

Manage Assessments Tab Overview

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Overview

The **Manage Assessments** tab can be enabled on standard form headers and appears at the top of the form. The **Management Assessments** tab allows you to:

- Add and update Objects in the library.
- Add the Object to Assessments already in progress.
- Push any Object changes to connected Assessments.

If you do not want your business users to have the ability to update or create library Objects, disable the **Manage Assessment** tab on the required forms or remove workflow permissions.

User Account Requirements

The user account you use to log into Resolver will need access to the form with the **Manage Assessment** tab enabled as well as relevant permissions for Objects you are creating or updating.

Related Information/Setup

You can enable/disable the **Manage Assessments** tab on individual form templates. For more information on how to activate/deactivate the **Manage Assessments** tab, please review the **Configure a Standard Form** article:

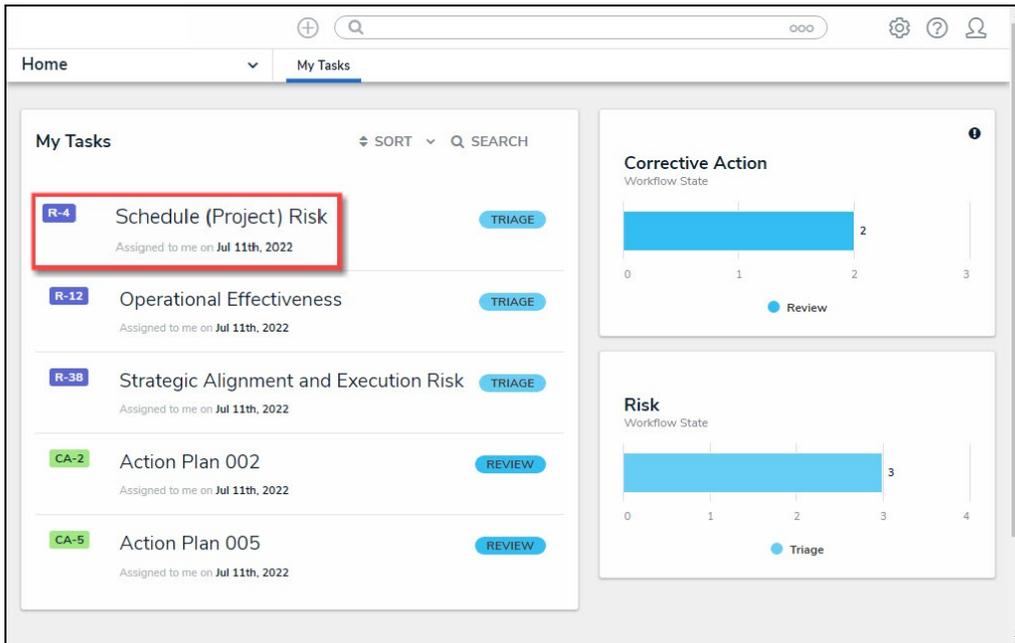
- [Configure a Standard Form](#)

The **Push Object Changes** feature allows users to push Object Changes (e.g., Risk name change) to all linked Assessment Objects and Library Objects. For more information on the **Push Object Changes** feature, please review the **Push Object Changers** article:

- [Push Object Changes](#)
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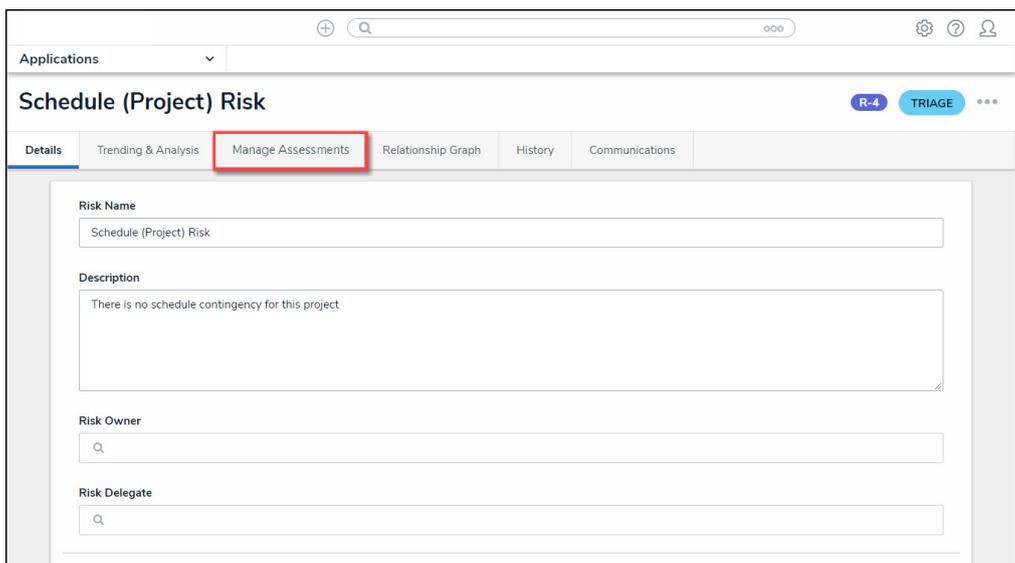
Navigation

1. From the **Home** screen, select a **Task** from the **My Tasks** list.



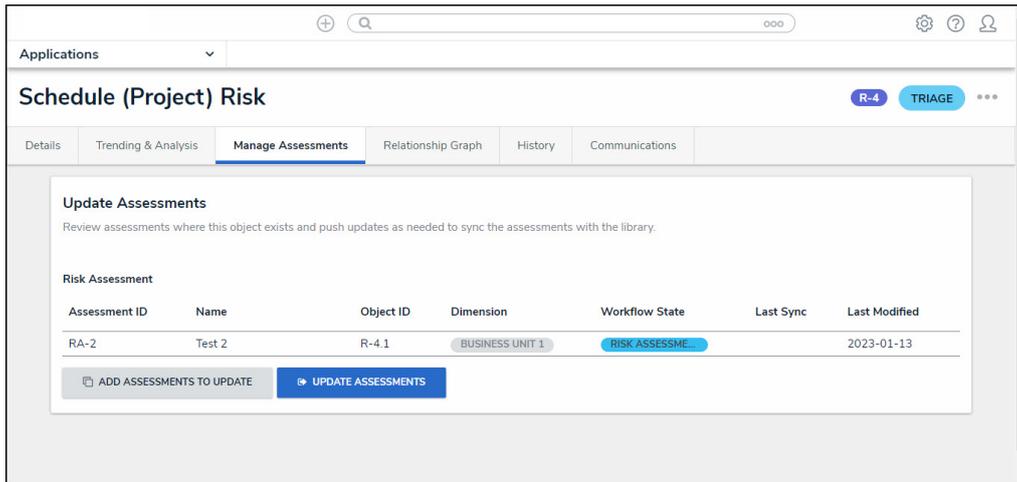
My Tasks List

2. From the **Form** screen, click on the **Manage Assessments** tab.



Manage Assessments Tab

3. The **Manage Assessments** tab will appear.



Manage Assessments Tab

Update Library Table

The **Update Library** table appears when the **Manage Assessment** tab is selected on an Object within an assessment.

Example:

- During a Risk Assessment, a Risk Owner clicks on an In Progress Risk from the **My Task** list on their **Home** screen and clicks the **Manage Assessment** tab.

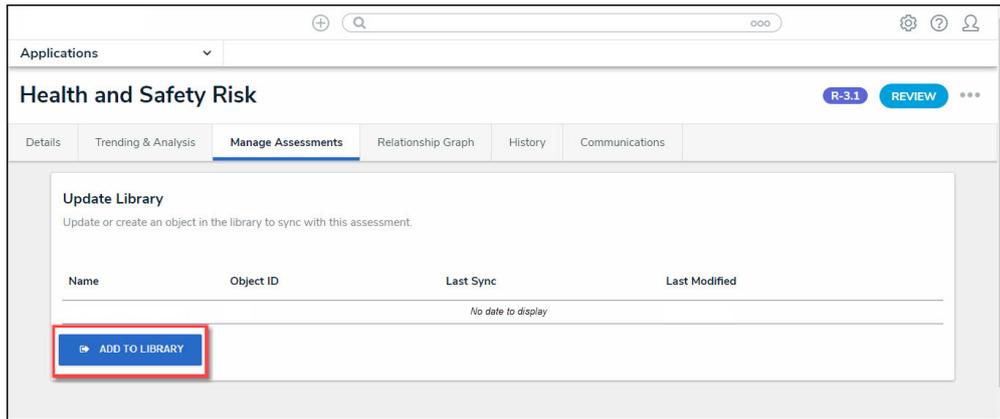
Users can create an Object in the library if they have create permissions on the library Object or can update an Object in the library if they have read/edit workflow permissions on the library Object.

The following fields appear on the **Update Library** table:

- **Name:** The name of the Object.
- **Object ID:** The Object's unique ID is used to identify the Object throughout the system.
- **Last Sync:** The date of the last data push from the Object to Library.
- **Last Modified:** The data of the last Object change.

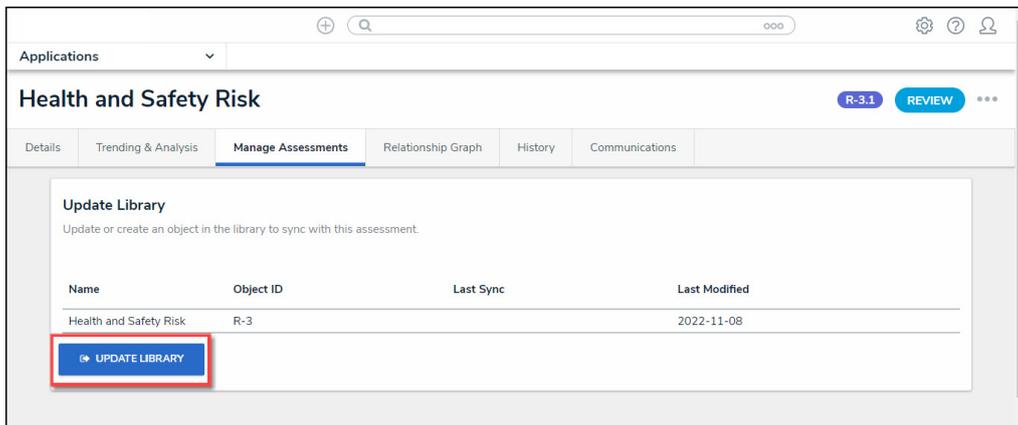
The following buttons will appear on the **Update Library** table depending on the circumstance:

- **Add to Library:** If the Object does not exist in the library, the **Add To Library** button will appear on the Manage Assessments tab. The Add To Library button allows users to create a new library Object from an Assessment.



Add To Library Button

- **Update Library:** If the Object does exist in the library, the **Update Library** button will appear on the **Manage Assessments** tab. The Update Library button allows users to push Assessment Object changes to a library Object.



Update Library Button



Note:

An Error message will appear at the top of the **Manage Assessments** tab if you attempt to update the Library by clicking the **Update Library** button but do not have edit permissions enabled on your user.

Update Assessments

The **Update Assessments** table appears when the **Manage Assessment** tab is selected on a library Object.

Example:

- When a Risk Team user opens a risk in the risk library, the **Update Assessments** table appears.

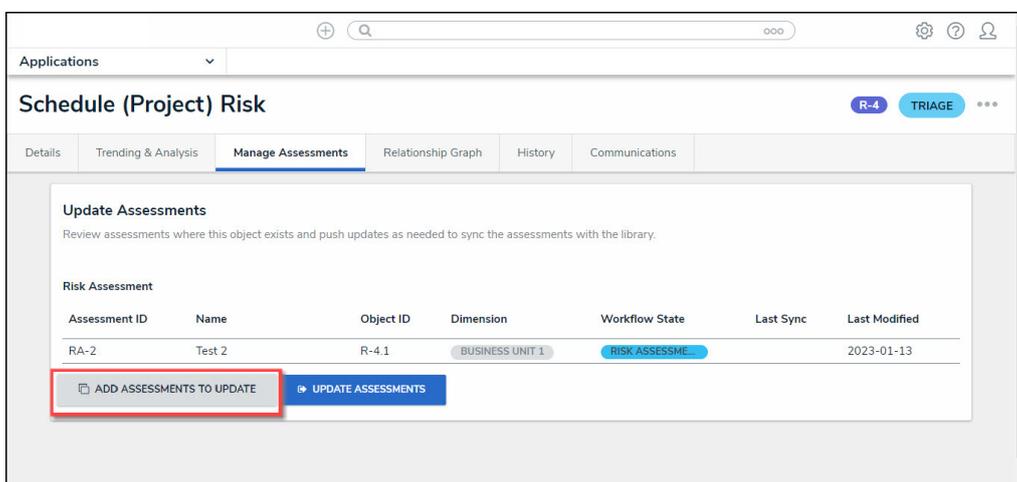
Users can push library Object changes to a linked or cloned Assessment.

The following fields appear on the **Update Assessments** table:

- **Assessment ID:** The Assessment's unique ID is used to identify the Object throughout the system. Click the **Assessment's ID** to open the **Object** pop-up for further information.
- **Name:** The name of the Assessment.
- **Object ID:** The Object's unique ID is used to identify the Object throughout the system. For existing Objects, the Object Clone's unique ID will be listed.
- **Dimension:** The category of data that appears on an assessment. Dimensions can be custom (e.g., select list) or based upon any relationships or references saved to the focus Object Type.
- **Workflow State:** The Current workflow state of the Object.
- **Last Sync:** The date of the last data push from the Library to Assessment.
- **Last Modified:** The date of the last Object change.
- Objects shared between assessments are displayed in the **Update Assessments** table.
 - **Existing Objects:** The **Update Assessments** table shows every Assessment containing a clone.
 - **New Objects:** The **Update Assessments** table will be blank.
 - **Read-only:** The **Manage Assessments** table is marked as **Read-only** if the user does not have permission to change assessments.

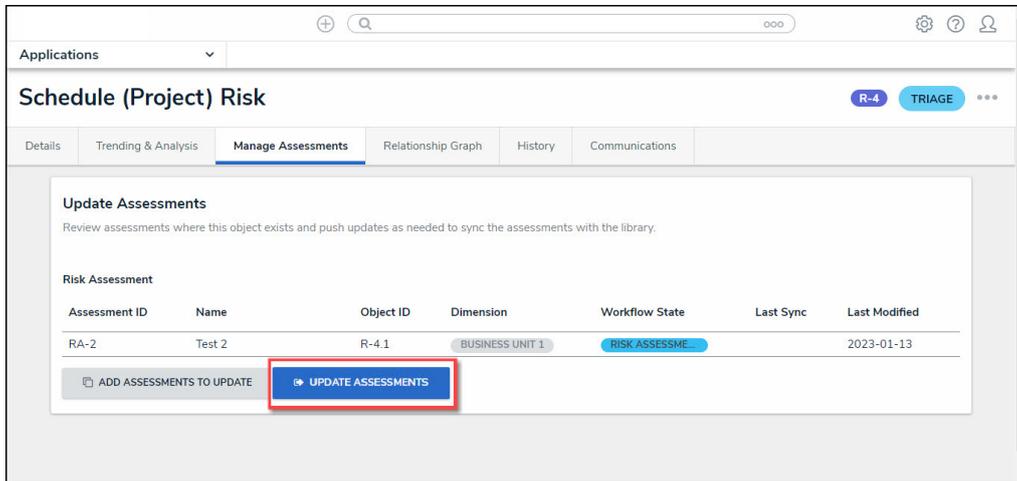
The following buttons will appear on the **Update Assessments** table depending on the circumstance:

- **Add Assessments To Update:** Use the **Add Assessments To Update** button to add impacted Assessments to the Update Assessments table to include the impacted Assessments in the Assessment update.



Add Assessments To Update Button

- **Update Assessments:** Use the **Update Assessments** button to push library Object changes to a linked or cloned Assessment.



Update Assessments Button

Additional Information

- The Name and Description properties are updated when a library Object is created from a cloned Object.
- Only **synced fields** are updated between the library and Assessment data.
- This feature does not add/update relationships between Objects.
- When a library Object is created from an assessment Object, the Object will be in the first workflow state after Creation.