Push Object Changes

Last Modified on 12/11/2024 2:43 pm EST

Overview

The **Push Object Changes** feature allows users to push Object Changes (e.g., Risk name change) to all linked Assessment Objects or Library Objects.

The **Push Object Changes** feature automatically includes the Name and Description properties. You will need to configure All other fields as synced fields on the assessment, see the Configure Synched Fields section for more information.

Adding/updating relationships between objects is not included with this feature.

Example:

- You can edit the name on the Library Risk Object and push to update the new name on all Assessment references associated with the Library Risk Object. Similarly, if the Risk name changes on the Assessment Object, you can push the change back to the Library Object.

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 the 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:
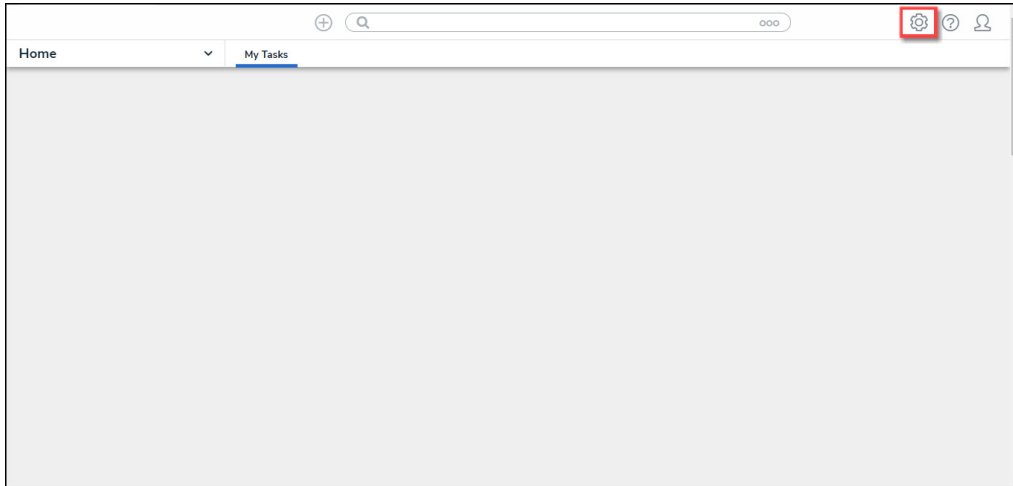
- Configure a Standard Form

For more information regarding the ***Manage Assessments*** tab, please review the **Manage Assessment Section** article:
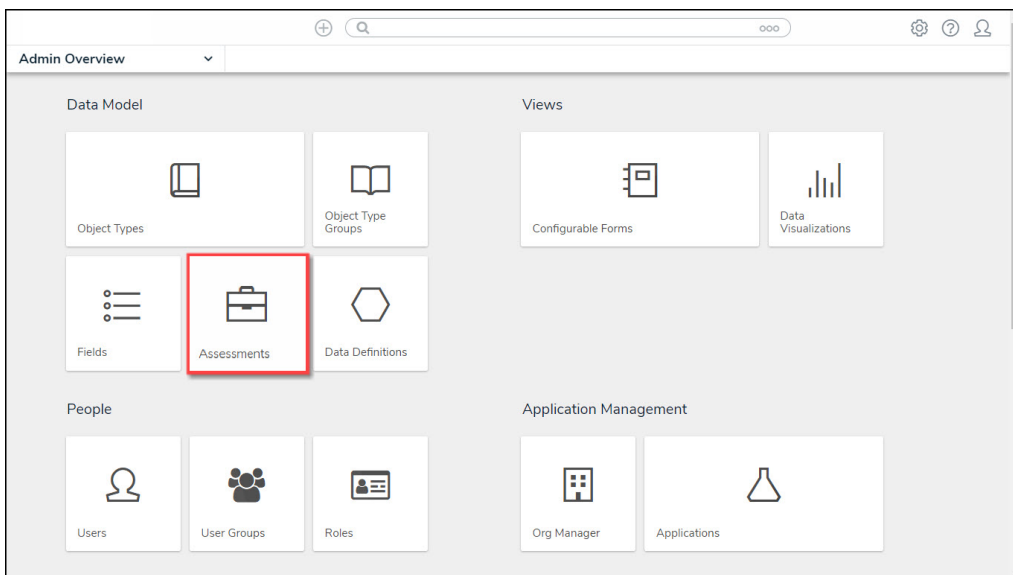
- Manage Assessments section

Navigation

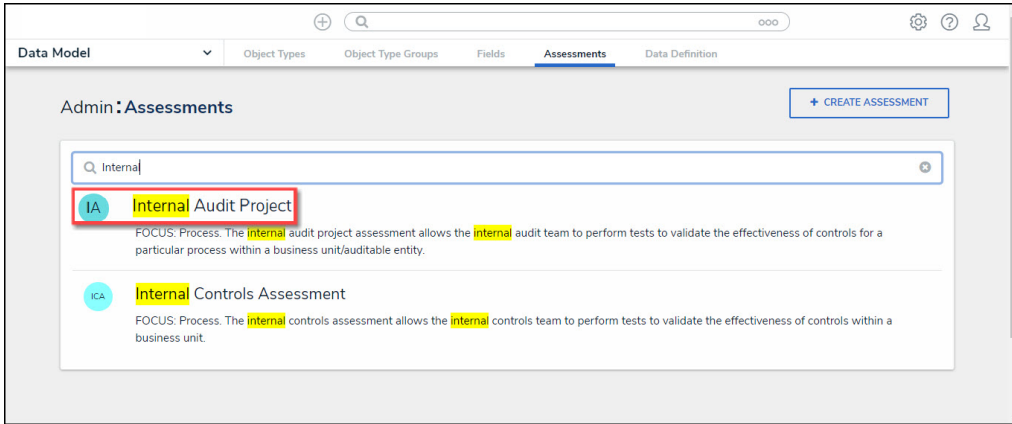1. From the ***Home*** screen, click the **Administration** icon.

Administration Icon

2. From the ***Admin Overview*** screen, click the **Object Types** tile on the ***Data Models*** section.

Assessments Tile

3. From the ***Assessments*** screen, enter an **Assessment Name** in the **Search** field to narrow down the **Assessment** list.
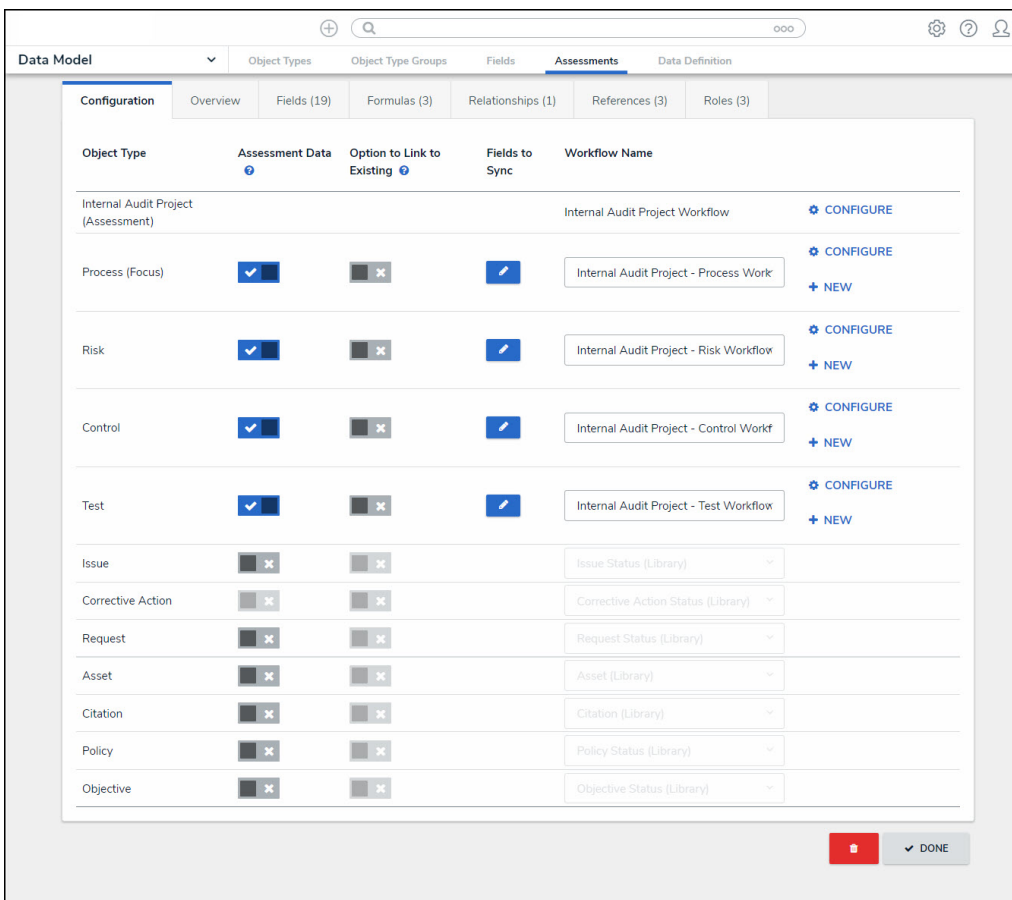4. Click an **Assessment Name**.

Assessment Name

Configure Synced Fields

Before using the Push Object Changes feature, users must select fields to be included when using the feature for each object type.

1. From the ***Edit Assessment*** screen, scroll to the **Configuration** tab.
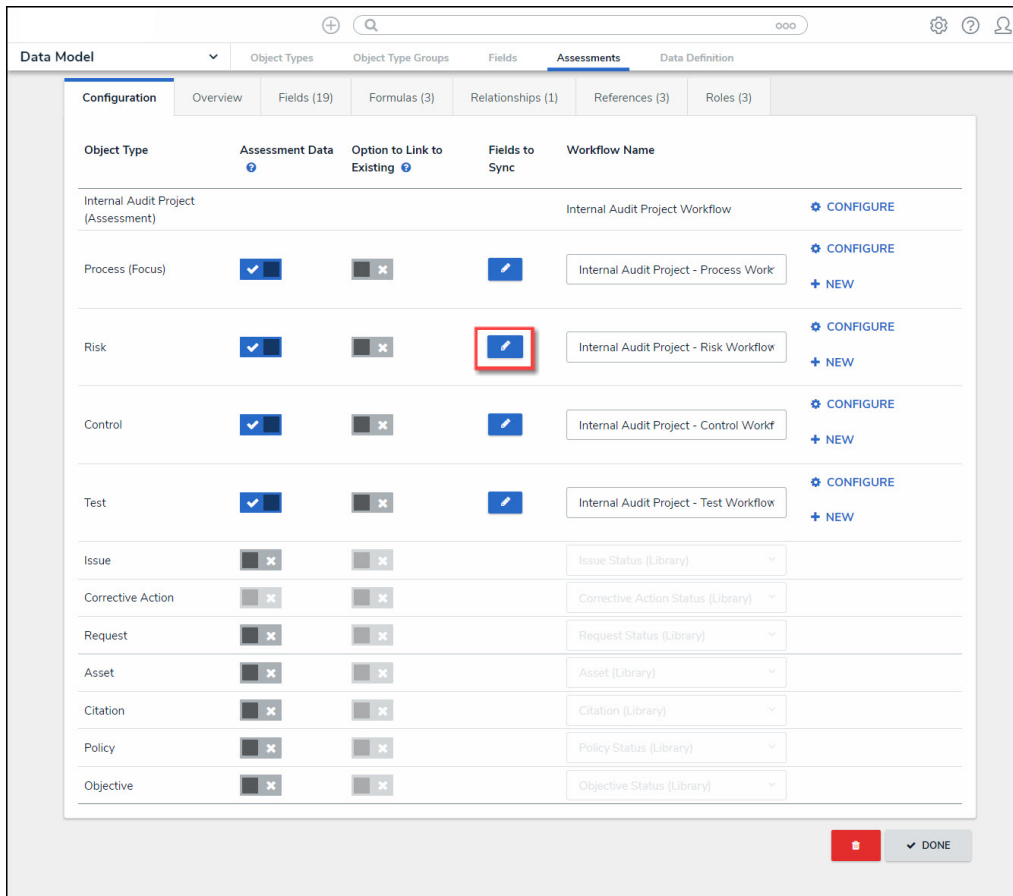

Configuration Tab

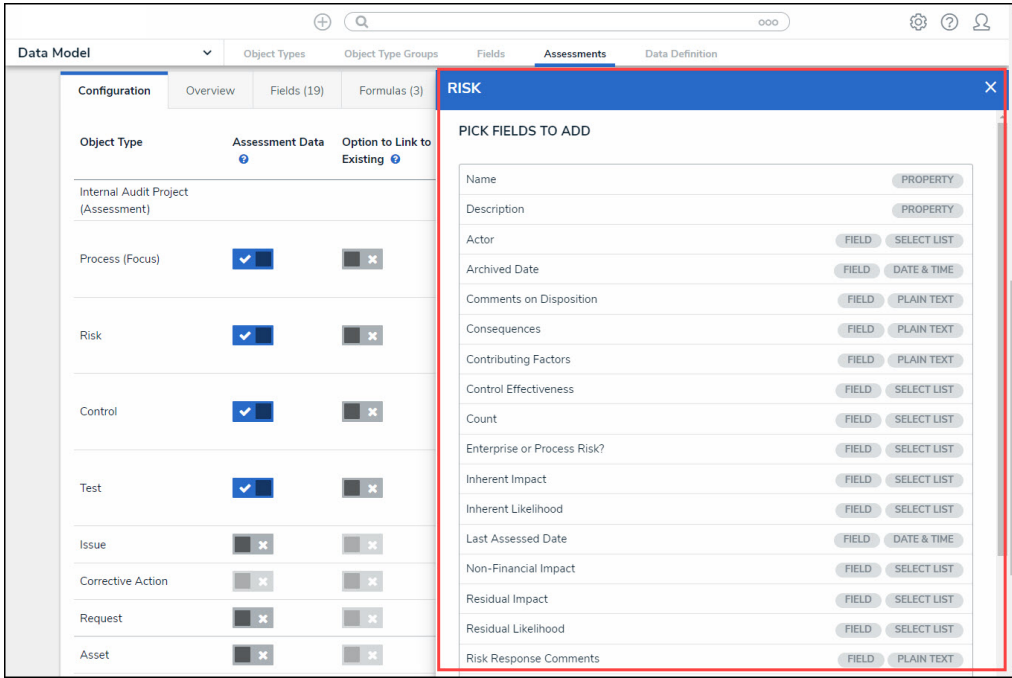2. Click the **Edit** button next to an **Object Type** under the **Fields to Sync** column.

Edit Button

3. From the **Pick Fields To Add** pop-up, click on Object Type Fields to add. Selected Fields will have a **Checkmark** in front of the Field name.
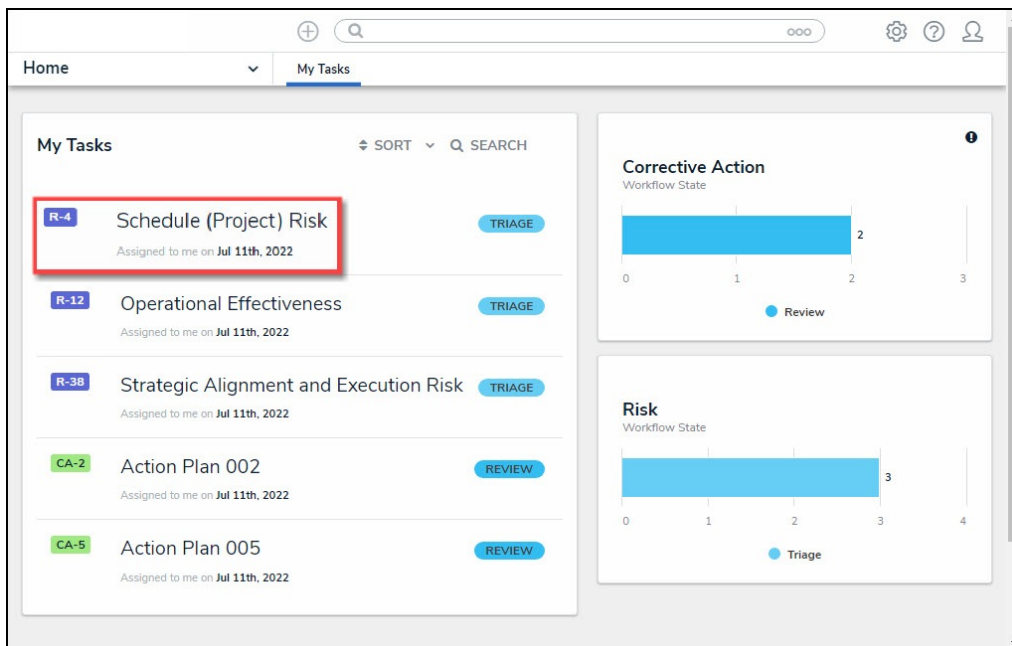
Select Object Type Fields to Edit

4. Click on the **x** in the top right-hand corner on the **Pick Fields to Add** pop-up to close the pop-up.
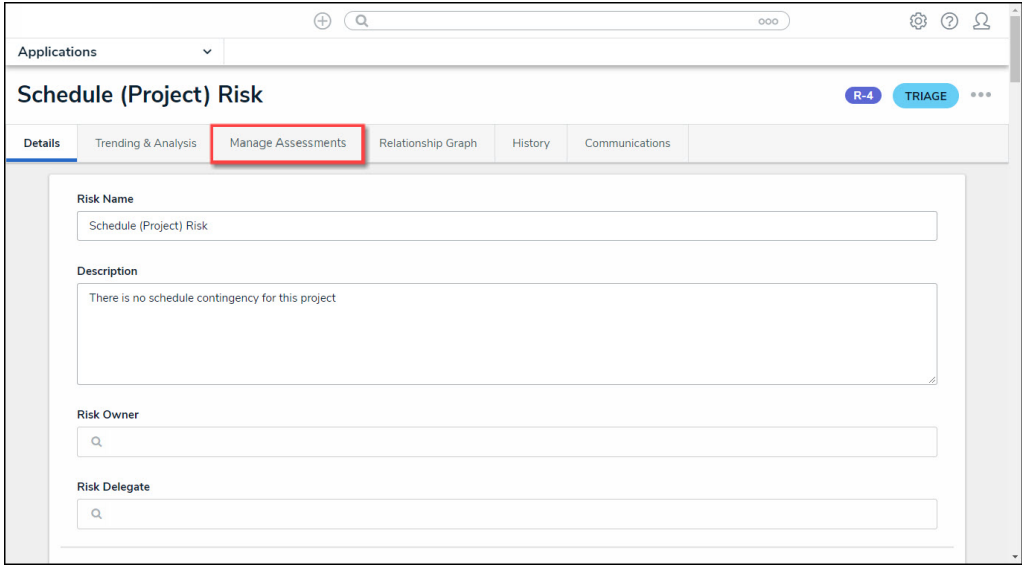
Navigation

1. From the **Home** screen, select a **Task** connected to the Object Type selected in Step 2 in the **Configure Synced Fields** section from the **My Tasks** list.

My Tasks List

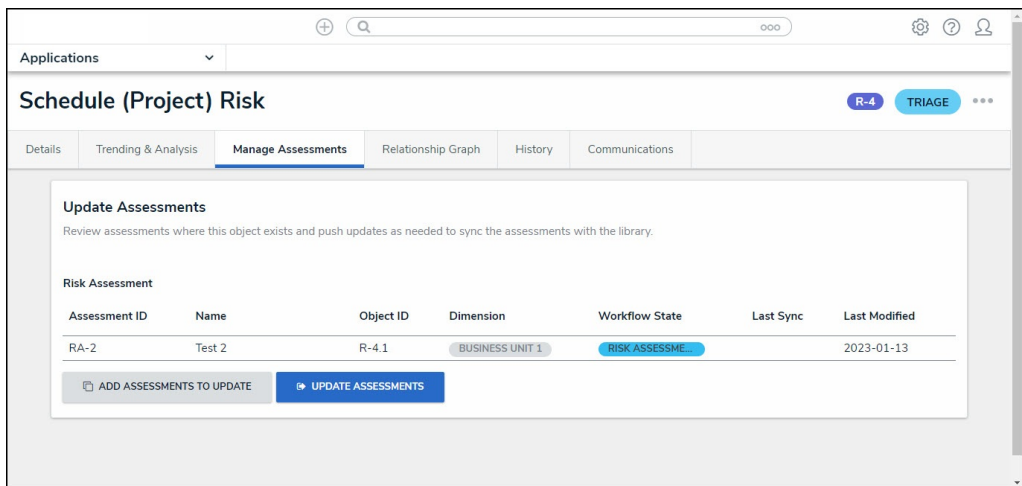2. From the **Form** screen, click on the **Manage Assessments** tab.

Manage Assessments Tab

Note:

If the **Manage Assessments** tab does not appear, you will need to contact your System Administrator to activate the tab.

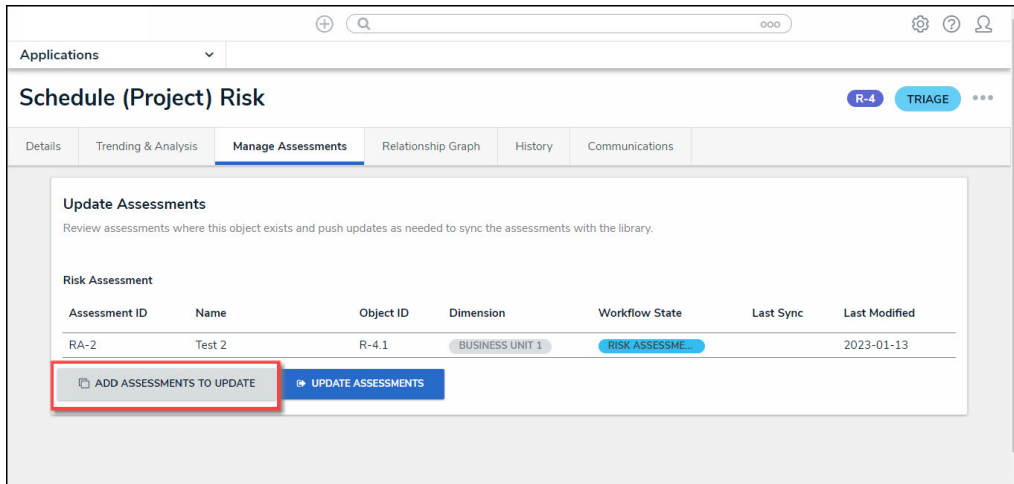# Push Object Changes From the Library to Assessments

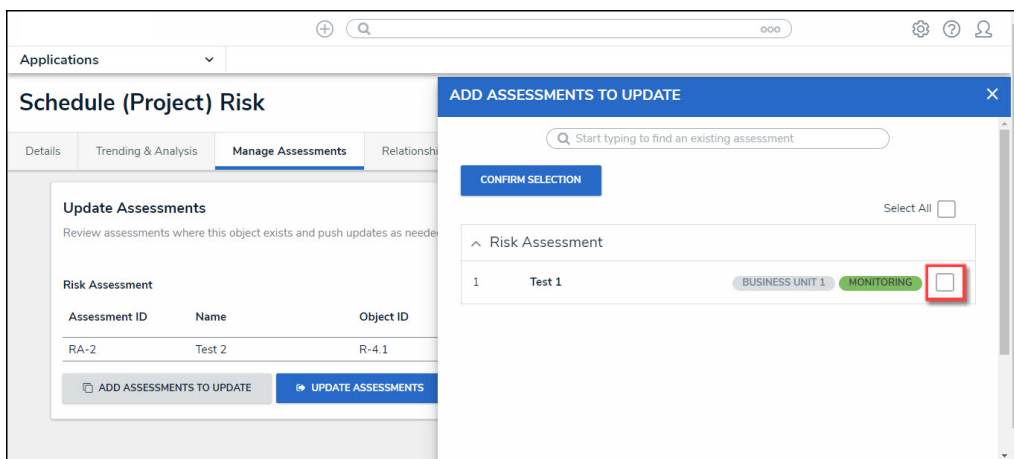1. The **Manage Assessments** tab will appear.

Manage Assessments Tab

(Optional) Add Assessments To Update

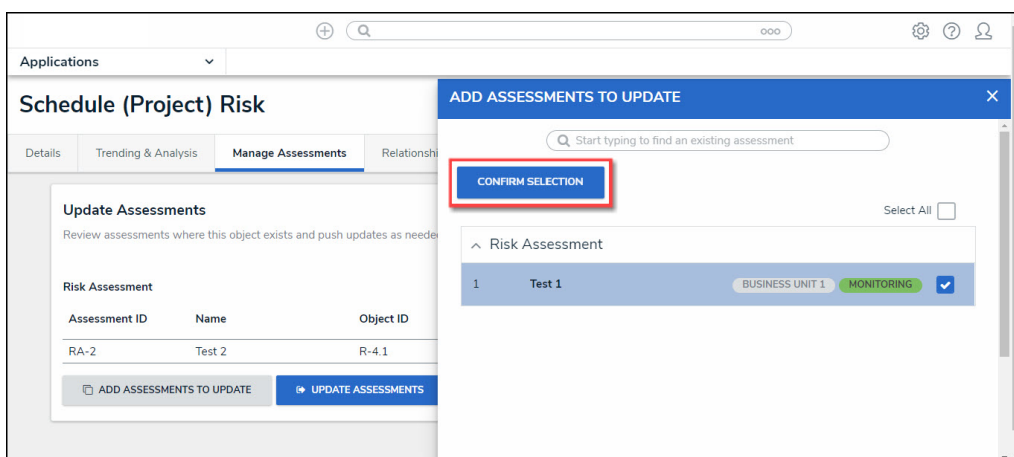1. Click on the **Add Assessments To Update** button.

Add Assessments To Update Button

2. From the **Add Assessments To Update** pop-up, click on the **Checkbox** next to an Assessment.
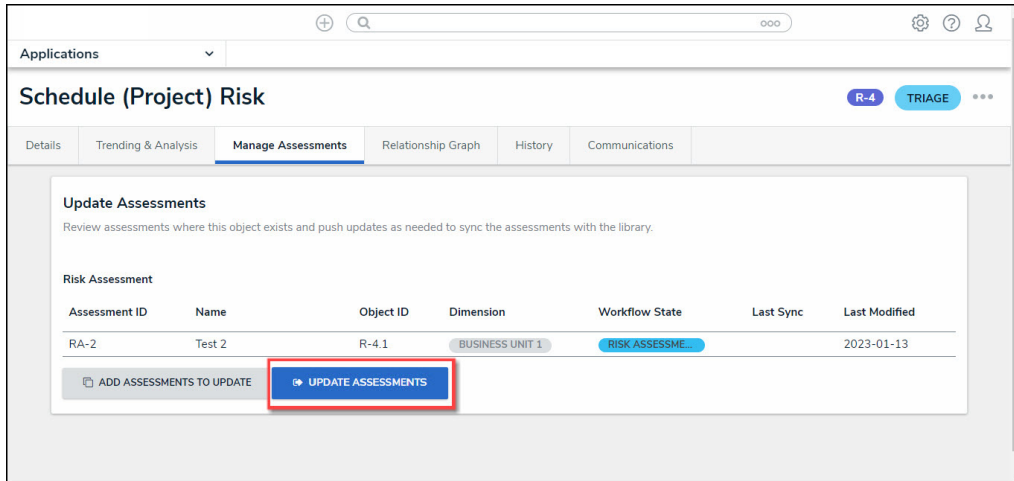

Checkbox

3. Click the **Confirm Selection** button to add the Assessment to the **Update Assessment** table.

Confirm Selection Button

2. Click on the **Update Assessments** button, to push object changes from the Library to Assessment.

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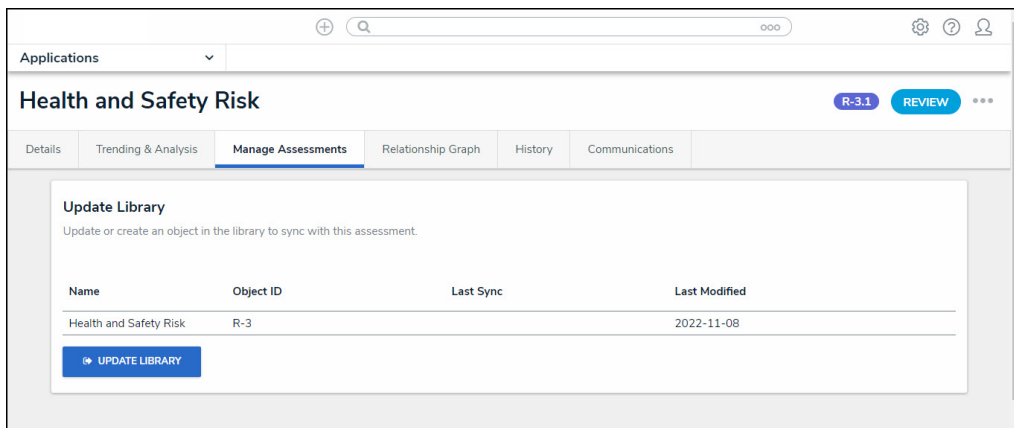

Update Assessment Button

Push Object Changes From an Assessment to Library

> **Note:**
> RTF (Rich Text Fields) are not supported when using the push object changes from an assessment to library feature.
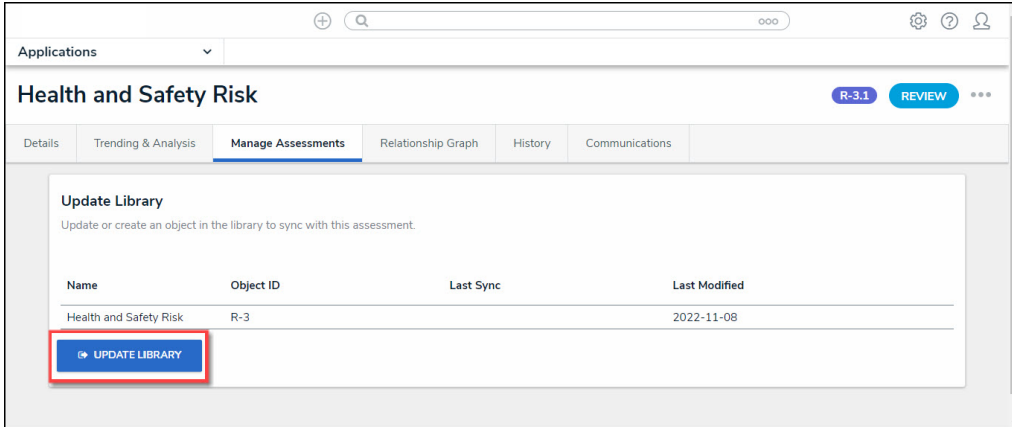
1. The **Manage Assessments** tab will appear.
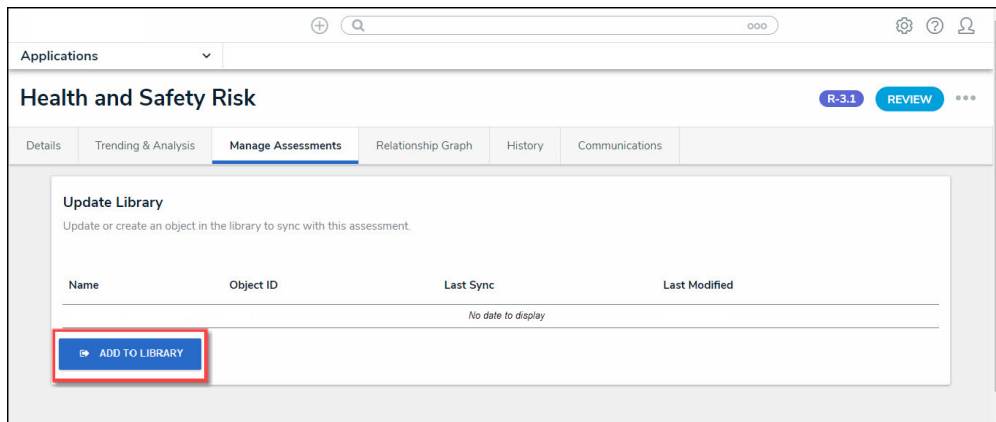

Manage Assessments Tab

2. Click on the **Update Library** or **Add To Library** buttons (depending on the circumstance), to push object changes from the Assessment to Library.

- **Update Library:** Use the **Update Library** button to push Assessment Object changes to a library Object.

Update Library Button

- **Add to Library:** Use the **Add To Library** button to create a new library Object from an Assessment.

Add To Library Button