

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.



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Home ~	My Tasks		 	
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Administration Icon

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

Admin Overview		⊕ (Q		000	\$ \$ \$
Data Model	×		Views		
Object Types		Object Type Groups	Configurable Forms	LIII Data Visualizations	
e	Assessments	Data Definitions			
People			Application Management		
<u>S</u> Users	User Groups	Roles	Org Manager Applications	\bigtriangleup	

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.



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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admin :	Assessment	s					+ CRE/	ATE ASSESSMENT		
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IA		The <mark>internal</mark> audit p	roject assessment allows init/auditable entity.	the <mark>internal</mark> a	udit team to perforn	n tests to validate the e	effectiveness of contro	ols for a		
ICA		trols Assessme The <mark>internal</mark> control:	ent s assessment allows the <mark>i</mark>	<mark>nternal</mark> contro	ols team to perform	tests to validate the eff	fectiveness of controls	s within a		

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.

ata Model	~ (Object Types	Object Type Groups	Fields	Assessments Data Definition		
Configuration	Overview	Fields (19)	Formulas (3)	Relationships (1)	References (3) Roles (3)		
Object Type	As	sessment Data	Option to Link to Existing 😧	Fields to Sync	Workflow Name		
Internal Audit Pro (Assessment)	ject				Internal Audit Project Workflow	© CONFIGURE	
Process (Focus)	•		×	1	Internal Audit Project - Process Work	CONFIGURE H NEW	
Risk	•		×	1	Internal Audit Project - Risk Workflow	CONFIGURE NEW	
Control	•		×	1	Internal Audit Project - Control Workf	CONFIGURE HNEW	
Test	•		×	1	Internal Audit Project - Test Workflow	CONFIGURE HNEW	
Issue		×	×				
Corrective Action		×	×				
Request		×	×				
Asset		×	×				
Citation		×	×				
Policy		×	×				
Objective		×	×				

Configuration Tab

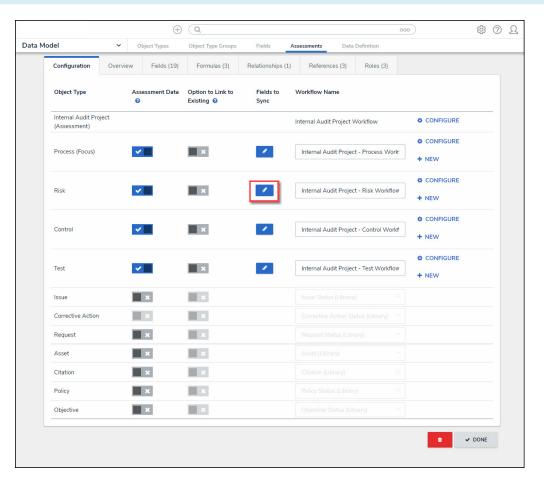
2. Click the Edit button next to an Object Type under the Fields to Sync column.



Note:

The Edit button will only appear for the corresponding Object Type, if the Assessment Data toggle switch is enabled. If the Assessment Data toggle switch is disabled the Edit button will not appear for that Object Type.

If the Assessment Data toggle switch is turned off after you have selected fields on the corresponding Object Type, all field selections will remain.



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.



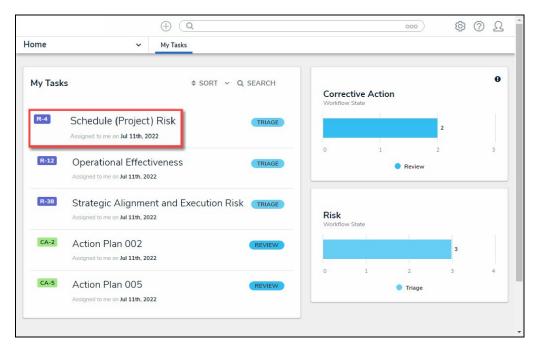
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ata Model	~	Object Types	Object Type Groups	Fields Assessments	Data Definition	
Configuration	Overvie	ew Fields (19)	Formulas (3)	RISK		\$
Object Type		Assessment Data	Option to Link to Existing 💡	PICK FIELDS TO ADD		
Internal Audit Pr	oiect			Name		PROPERTY
(Assessment)				Description		PROPERTY
		_	- L	Actor		FIELD SELECT LIST
Process (Focus)		✓	×	Archived Date		FIELD DATE & TIME
				Comments on Disposition		FIELD PLAIN TEXT
Risk		~	×	Consequences		FIELD PLAIN TEXT
				Contributing Factors		FIELD PLAIN TEXT
				Control Effectiveness		FIELD SELECT LIST
Control		✓	×	Count		FIELD SELECT LIST
				Enterprise or Process Risk?		FIELD SELECT LIST
Test		V	×	Inherent Impact		FIELD SELECT LIST
			-	Inherent Likelihood		FIELD SELECT LIST
Issue		×		Last Assessed Date		FIELD DATE & TIME
Corrective Action				Non-Financial Impact		FIELD SELECT LIST
				Residual Impact		FIELD SELECT LIST
Request		×	<u>×</u>	Residual Likelihood		FIELD SELECT LIST
Asset		×	×	Risk Response Comments		FIELD PLAIN TEXT

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

 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.



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Applicati	ons ~	•					
Schee	dule (Project)	Risk					R-4 TRIAGE ••••
Details	Trending & Analysis	Manage Assessments	Relationship Graph	History	Communications		
	Risk Name						
	Schedule (Project) Risk						
	Description						
	There is no schedule co	ntingency for this project					
	Risk Owner						
	Q						
	Risk Delegate						
	Q						



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.

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As							Last Mouli		
	A-2 Te	st 2 F	R-4.1 BUSI	INESS UNIT 1	RISK ASSESSME		2023-01-1		
RA	A-2 Te			INESS UNIT 1	RISK ASSESSME				

Manage Assessments Tab

(Optional) Add Assessments To Update

1. Click on the Add Assessments To Update button.



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Applica	tions	~						
Sche	dule (Proje	ect) Risk					R-4 TRIAGE	
Details	Trending & Analy	vsis Manage Assessments	Relationship Graph	History	Communications			
F	Jpdate Assessme Review assessments w Risk Assessment Assessment ID RA-2	nts here this object exists and push t Name Test 2	Object ID Dimen		s with the library. Workflow State	Last Sync	Last Modified	
C	ADD ASSESSMEN		ASSESSMENTS		NIK ASSESSME		2023-01-13	

Add Assessments To Update Button

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

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Applications ~	
Schedule (Project) Risk	ADD ASSESSMENTS TO UPDATE X
Details Trending & Analysis Manage Assessments Relationshi	Q. Start typing to find an existing assessment
Update Assessments Review assessments where this object exists and push updates as needer Risk Assessment	CONFIRM SELECTION Select All Select All Test 1 BUSINESS UNIT 1 MONITORING
Assessment ID Name Object ID RA-2 Test 2 R-4.1	
ADD ASSESSMENTS TO UPDATE Or UPDATE ASSESSMENTS	
	••



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

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chedule (Pr	oject) Risk		ADD ASSESSMENTS TO UPDAT	ſE		>
etails Trending &	Analysis Manage	Assessments Relations		d an existing assessment		
Update Asses Review assessme		sts and push updates as need	CONFIRM SELECTION A Risk Assessment		Select All	
Risk Assessment			1 Test 1			
Assessment ID	Name	Object ID				
RA-2	Test 2	R-4.1				
C ADD ASSES	SMENTS TO UPDATE	UPDATE ASSESSMENTS				



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.

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Applicati	ons ~						
Schee	dule (Project)	Risk					R-4 TRIAGE ••••
Details	Trending & Analysis	Manage Assessments	Relationship Graph	History	Communications		
A	sk Assessment ISSESSment ID Nar IA-2 Tes		Object ID Dimer R-4.1 BUSI	sion NESS UNIT 1	Workflow State	Last Sync	Last Modified 2023-01-13
	C ADD ASSESSMENTS TO	UPDATE (* UPDATE A	SSESSMENTS				

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.

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Applicat	tions ~	•							
Healt	th and Safety	Risk					R-3.1	REVIEW	***
Details	Trending & Analysis	Manage Assessments	Relationship Graph	History	Communications				
	Jpdate Library								
		the library to sync with this a	ssessment.						
	Name	Object ID	Last Syn	nc	L	ast Modified			
5	Health and Safety Risk	R-3			2	022-11-08			
	UPDATE LIBRARY								

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.

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Applicat	ions ~									
Healt	Health and Safety Risk								•••	
Details	Trending & Analysis	Manage Assessments	Relationship Graph	History	Communications					
U	Update Library Update or create an object in the library to sync with this assessment. Name Object ID Last Sync Last Modified									
1	Health and Safety Risk	R-3			2	022-11-08				
	UPDATE LIBRARY									

Update Library Button

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

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Applicati	ions 🗸									
Healt	h and Safety	Risk					R-3.1	REVIE	v	•••
Details	Trending & Analysis	Manage Assessments	Relationship Graph	History	Communications					
	Update or create an object in the library to sync with this Name Object ID		Last Sync No date to display							
N	lame	Object ID				Last Modified				

Add To Library Button