

# Adding Assessment Type Data to a Data Set

Last Modified on 01/29/2025 4:48 pm EST

## **Overview**

Administrators can include Assessment-Type data within a Data Set to generate a programmatic link between all library objects on your data path and their assessments (clones). Using the Assessment-Type data feature, you can aggregate across assessments on your Dashboard to reveal insights like Top 10 Risks or Average Risk Score by Category.

*Note:* The Include Assessment Data toggle switch cannot be enabled or disabled after creating a Data Set.

#### **User Account Requirements**

The user account you use to log into Resolver must have Administrator permission or Data Management advanced permissions to add assessment type data to a Data Set.

### **Related Information/Setup**

Please refer to the Creating a New Dashboard Data Set article for more information on adding a Data Set to the system.

### Navigation

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

		Q Search	***	\$ ®
Home	✓ My Tasks			
	My Tasks	¢ sort Q search		

#### Administration Icon



2. From the Administrator Settings menu, click the Admin Overview link.

			•••	<b>8</b> ? 2
Home	∽ My Tasks			Admin Overview
				Settings
	My Tasks	SORT Q SEARCH		🈂 User Management
				Branding
				Az Languages

Administrator Settings Menu

3. From the *Admin Overview* screen, click on the **Dashboard Data Sets** tile under the **Views** section.

			• Q Search				\$ ? 2
Admin Over	view ~						
	Data Model			Views			
	Object Types	1	Object Type Groups	Configurable Forms		<b>D</b> ata Visualizations	
	Fields	Assessments	Data Definitions	Dashboard Data Sets	Dashboard Builder	<u>ک</u>	
	Playbooks Automation						

Dashboard Data Sets Tile

## Adding Assessment Type Data to a Data Set

 From the *Admin: Dashboard Data Set* screen, click a **Data Set** with the **Include** Assessment Date toggle switch enabled.

	00	··· 章 ② 오								
Views	~	Forms	Data Visualizations	Dashboard Data Sets	Dashboard Builder					
Admin: Dash	+ CREATE DATA SET									
Q Search	Q Search									
1 Data Sets   1/50 Pub	lished Data S ent Manag	ets   0 Unpu ement	blished Data Sets 🥑							



#### Data Set

2. From the *Admin: Edit Data Set* screen, scroll to the *Assessment Type* tab section.



Assessment Type Tab

3. Click the + Add Assessment Type(s) button.

		⊕ Q Search			000	\$ \$	Ω	*
Views	~	Forms Data Visualiza	ations Dashboard Da	ta Sets Dashboard Bu	uilder			
					CANCEL	UPDATE		
Assessment Type	Fields (0/100)	Formulas (0/100)	Properties (12/100)	Data Transformation	Roles			
	+ ADD ASSESSI	MENT TYPE(S)						
All of the assessment	types that are assoc	ciated with <b>Incident Manaç</b>	gement.					l
					ŵ	✓ DON	E	Ļ

+ Add Assessments Type(s) Button

4. From the Add Assessments Types pop-up, click on an Assessment Name from the list.



	$\oplus$	Q Search		000	(j)	?	Ω	
/iews ~	Forms	Data Visualizations	Dashboard Data Sets	Dashboard Builder				
Incident		ADD ASSESSMENT	TYPES				×	
Select Data Paths Clicking relationship and object type node:	s below will	SELECT WHICH ASSESSM	IENT TYPES YOU'D LIKE TO IN	ICLUDE IN YOUR DATA SET				Î
□ Incident		Q Search						
Involved Location(s)								I
IL Involved	Location <b>~</b>	+ ADD SELECTED (0	p					l
Primary Incident Type	ł.	Select All						
🗈 🕕 Incident	Туре✔		_					
Related Cases (Reference)	ence)	IT Risk Assessm	ent					
C Case		Compliance Ass	essment					
		Process Risk Ass	sessment					
		IT Compliance A	ssessment					
Assessment Type Fields (0/10	)0) F	Internal Controls	Assessment					•

Assessment Name

5. When you have added all the Assessments you wish to include, click the **+ Add Selected** button to add them to the Data Set.

	$\oplus$	Q Search		000	\$ <u>\$</u>	?	Ω	*
Views ~	Forms	Data Visualizations	Dashboard Data Sets	Dashboard Builder				
Incident		ADD ASSESSMENT	TYPES				×	
Select Data Paths Clicking relationship and object type node	s below will	SELECT WHICH ASSESSM	ENT TYPES YOU'D LIKE TO IN	CLUDE IN YOUR DATA SET				
□ Incident		Q Search						
Involved Location(s)			_					
	Location <b>~</b>	+ ADD SELECTED (3)						h
Primary Incident Type	•	Select All						
🛛 🕕 Incident	Туре✔							1
Related Cases (Reference)	ence)	IT Risk Assessme	ent				.	
C Case		<ul> <li>Compliance</li> </ul>	Assessment					
		Process Risk Ass	essment					
		<ul> <li>IT Complian</li> </ul>	ce Assessment					
Assessment Type Fields (0/10	00) F	<ul> <li>Internal Cor</li> </ul>	trols Assessment					

+ Add Selected Button

6. Click the **Select All** checkbox to include all listed Assessments in the Data Set.



	$\oplus$	Q Search		000	\$ \$	) <u>R</u>	4
/iews	✓ Forms	Data Visualizations	Dashboard Data Sets	Dashboard Builder			
Incident		ADD ASSESSMEN	T TYPES			×	
Select Data Paths Clicking relationship and object type	e nodes below will	SELECT WHICH ASSESS	MENT TYPES YOU'D LIKE TO IN	CLUDE IN YOUR DATA SET			Î
	_	Q Search					
Involved Location	on(s)						l
	volved Location	+ ADD SELECTED (1	12)				l
Primary Incident	t Type	Select All					
🛛 🕕 Inc	ident Type✔						l
Related Cases (	Reference)	✓ IT Risk Ass	essment				
C Ca	se✔	<ul> <li>Compliance</li> </ul>	e Assessment				
		<ul> <li>Process Ris</li> </ul>	sk Assessment				
		<ul> <li>IT Complia</li> </ul>	nce Assessment				
Assessment Type Fields	s (0/100) F	<ul> <li>Internal Co</li> </ul>	ntrols Assessment				
							~

Select All Checkbox

7. Click the + Add Selected button to add all selected Assessments to the Data Set.

	$\oplus$	Q Search		000	¢	?	Ω	*
Views ~	Forms	Data Visualizations	Dashboard Data Sets	Dashboard Builder				
Incident		ADD ASSESSMENT	TYPES				×	
Select Data Paths Clicking relationship and object type nodes	below will	SELECT WHICH ASSESSM	IENT TYPES YOU'D LIKE TO IN	ICLUDE IN YOUR DATA SET				Î
□ Incident		Q Search						
Involved Location(s)								
IL Involved	Location <b>~</b>	+ ADD SELECTED (1	2)					h
Primary Incident Type		Select All						
🛚 🕕 Incident	Гуре🗸							
Related Cases (Refere	nce)	✓ IT Risk Asse	essment					
C Case		<ul> <li>Compliance</li> </ul>	Assessment					l
		✓ Process Ris	k Assessment					l
		✓ IT Compliar	nce Assessment					
Assessment Type Fields (0/10	0) F	<ul> <li>Internal Cor</li> </ul>	ntrols Assessment					<b>•</b> •

+ Add Selected Button

8. The selected Assessments will appear under the *Assessment Type* tab on the Data Set.



	( Q Search					000	\$ <u></u>	?	Ω	4
Views 🗸	Forms Data Visuali	zations	Dashboard Dat	a Sets	Dashboard B	uilder				
Related Cases (Referentiation)	ce)									
C Case										
									_	
						CANCEL	UF	DATE		
Assessment Type Fields (0/100	) Formulas (0/100)	Prope	rties (12/100)	Data	Transformation	Roles				
					Г					
					L	+ ADD ASSESS	MENT TY	PE(S)		
All of the assessment types that are as	sociated with Incident Man	agement.								1
IT Risk Assessment								\$5	i .	I
IT Compliance Assessment								S		I
· · · · · · · · · · · · · · · · · · ·										I
Internal Controls Assessment								\$5	i -	I
			•				_		_	
						ů	•	DON	IE	

Assessments