

Configuring Filters for Scoping Assessments

Last Modified on 11/14/2025 8:40 am EST

Overview

Administrators now have greater control over how filters are displayed during assessment scoping by configuring which filters appear for each object type, helping users focus on the most relevant items when confirming the scope of an assessment.

Related Information/Setup

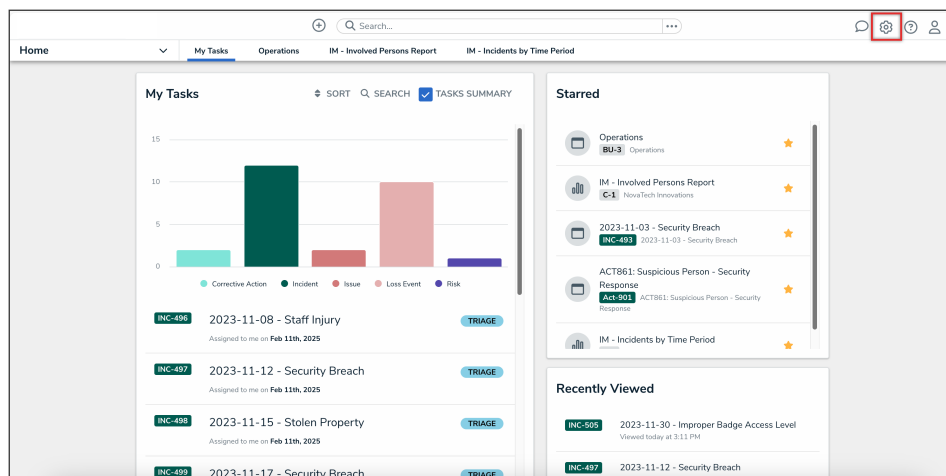
For further information on scoping an assessment, refer to the [Scope and Launch an Assessment](#) article.

User Account Requirements

The user must have Administrator permissions to access the **Assessments** tile.

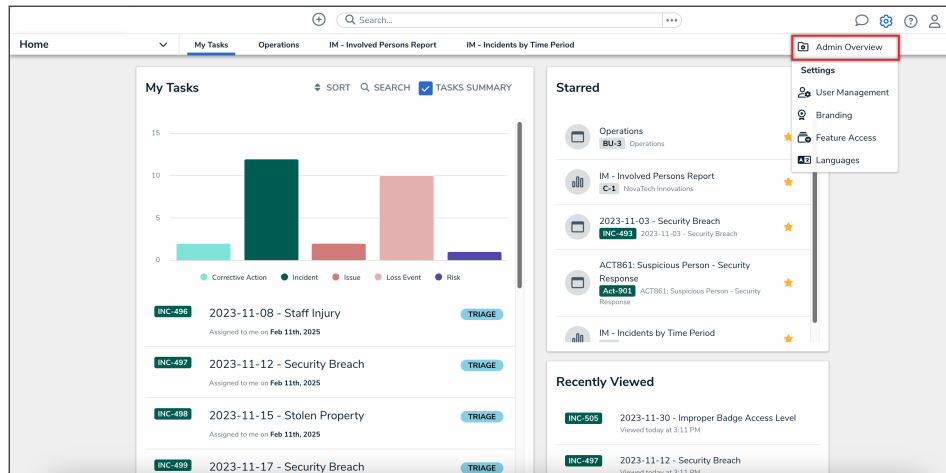
Navigation

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



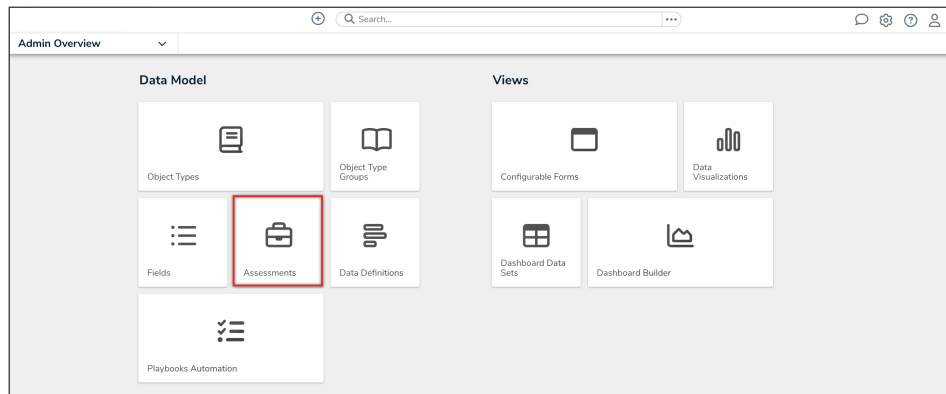
Administration Icon

2. From the **Administrator settings** menu, click the **Admin Overview** link.



Admin Overview Link

- From the **Admin Overview** screen, click the **Assessments** tile under the **Data Model** section.

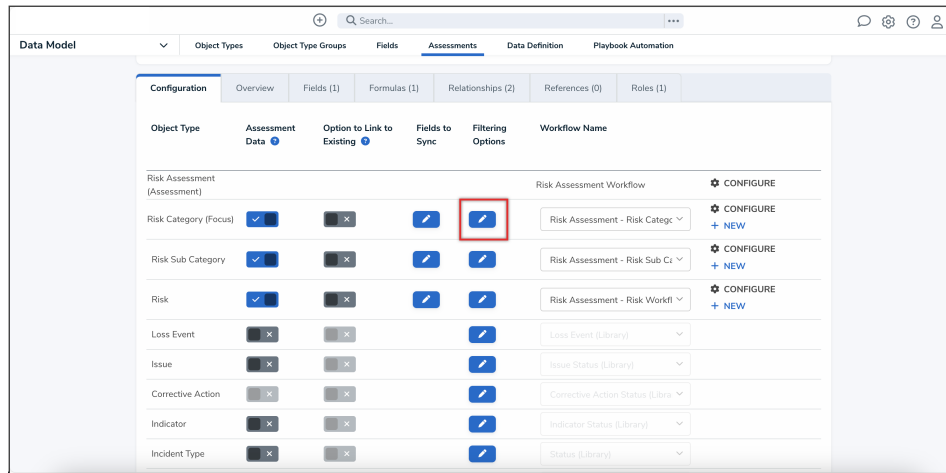


Assessments Tile

- From the **Admin: Assessments** screen, from the list of assessment types, click the assessment type that you want to scoping filters to.

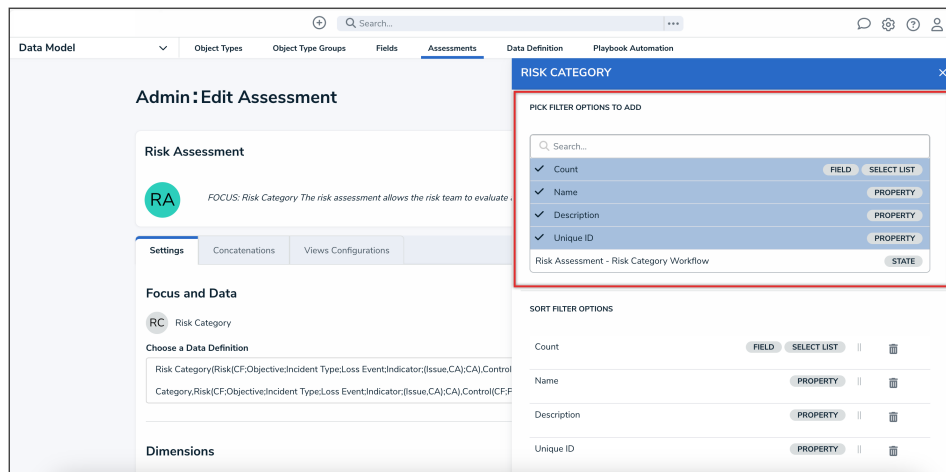
Configuring Filters for Scoping Assessments

- On the **Admin: Edit Assessment** screen, from the **Configuration** tab, click the **Edit Filtering Options** icon under the **Filtering Options** column.



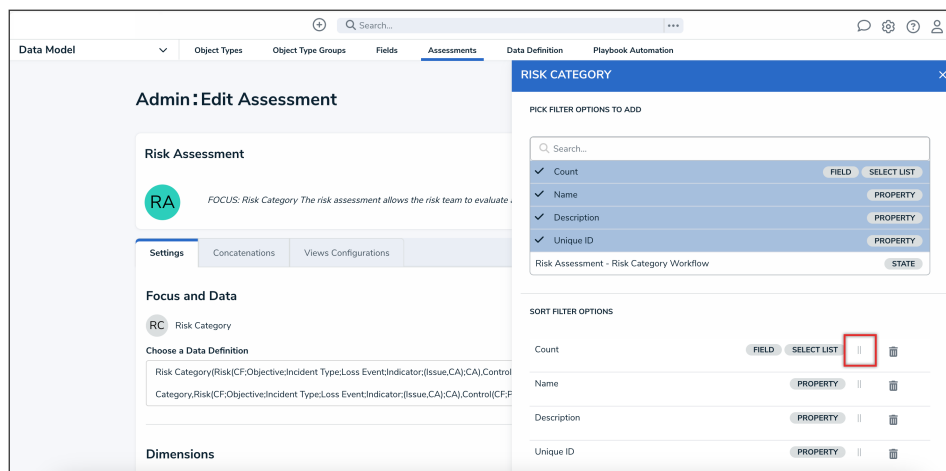
Edit Filtering Options Icon

2. From the **Pick Filter Options to Add** dropdown, search and select filters to add to the assessment scope.
 - To remove a filter from the assessment scope, click it again to deselect the filter.



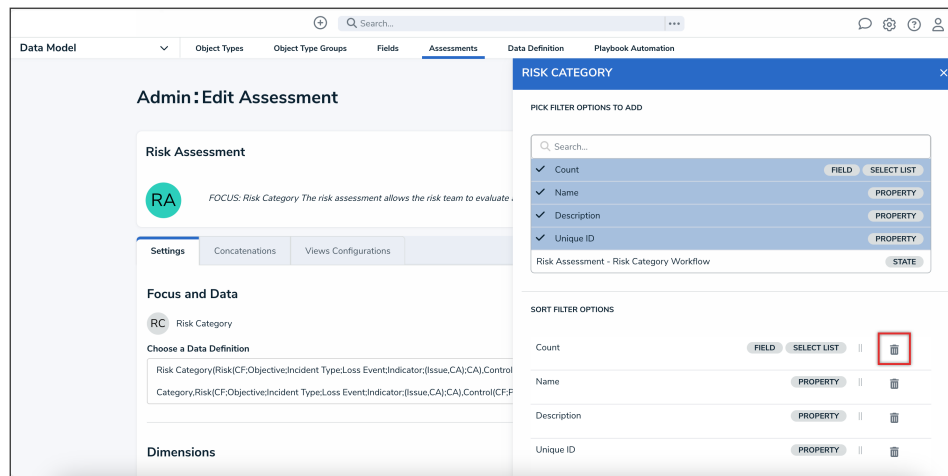
Pick Filter Options to Add Dropdown

3. **(Optional):** From the **Sort Filter Options** section, click the **Reorder** icon to drag the filters into the order you would like them to appear on the assessment scope.



Reorder Icon

4. **(Optional):** From the **Sort Filter Options** section, click the **Delete** icon to delete the filter from the assessment scope.



Delete Icon