

Configure Assessment Workflows

Last Modified on 02/19/2025 10:13 am EST

Overview

Objects in an assessment may require different processes depending on the assessment type, administrators can configure unique workflows for object types added to assessments. While assessment types can only have one workflow, the object types added to an assessment can have multiple.



Note:

An Assessment's workflow does not support required fields on creation.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions.

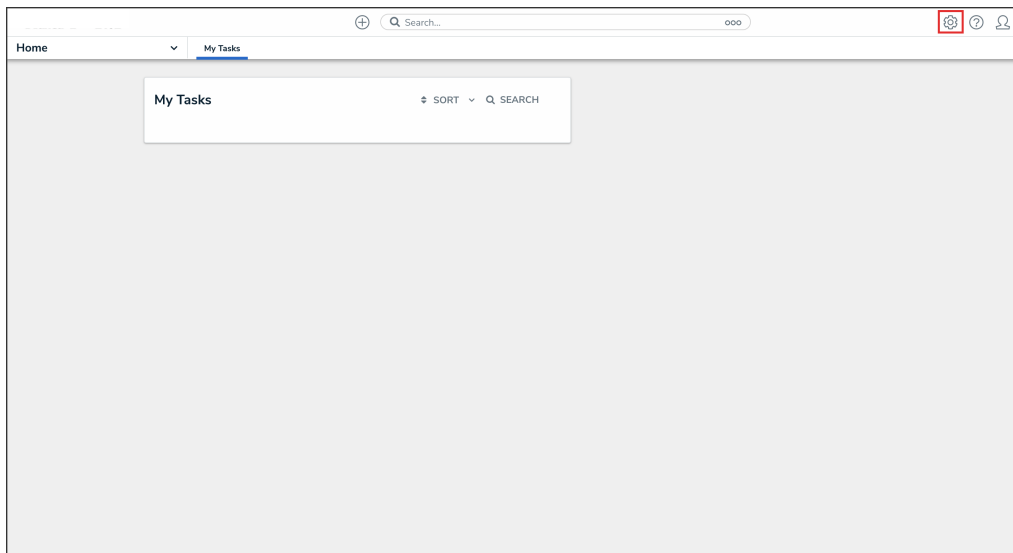
Related Information/Setup

Please refer to the [Assessment Reference Data](#) article for more information on Assessment Reference Data.

Please refer to the [Activating the Link to Existing Feature](#) article for more information on the Link to Existing feature.

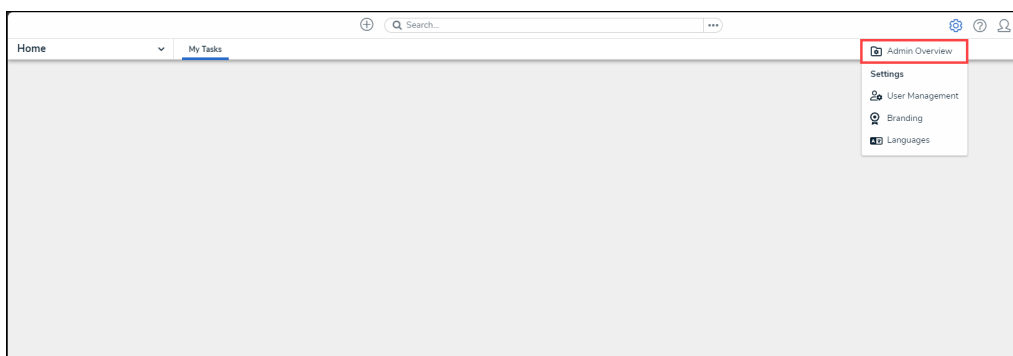
Navigation

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



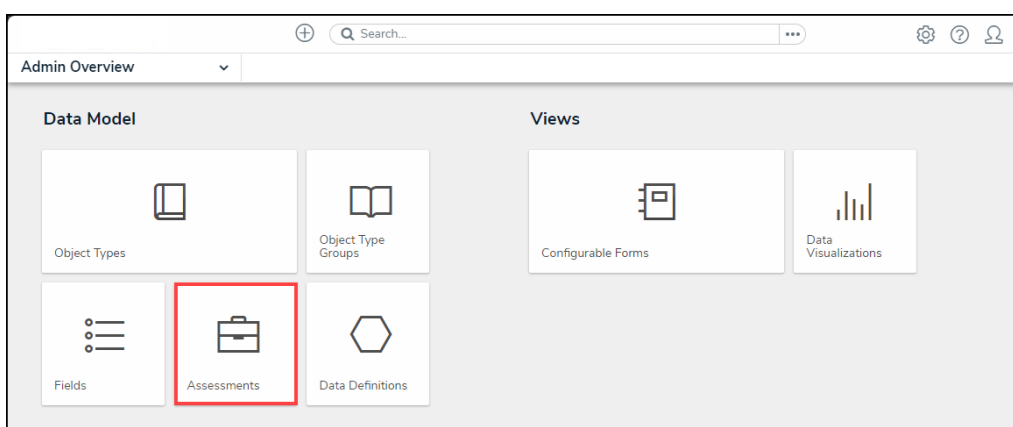
Administration Icon

- From the **Administrator Settings** menu, click **Admin Overview**.



Admin Overview

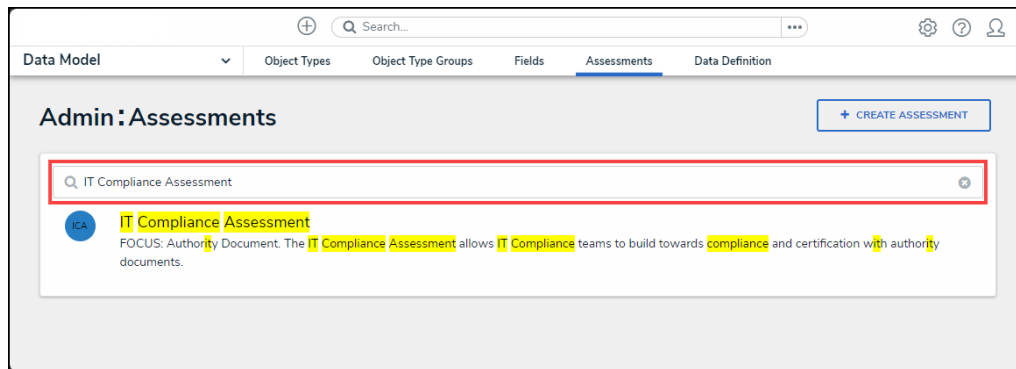
- From the **Admin Overview** screen, click the **Assessment** tile from the **Data Model** section.



Assessment Tile

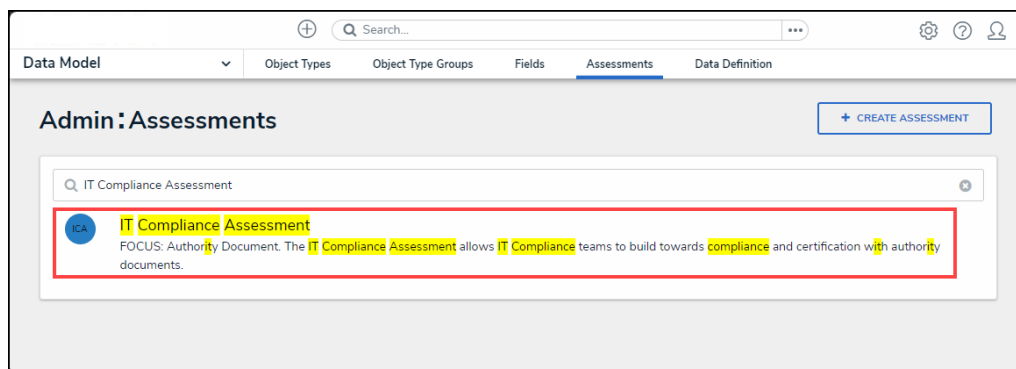
- From the **Admin: Assessments** screen, enter an **Assessment Object Type Name** in the

Search field to narrow the search results.



Search Field

5. Click on an **Assessment Object Type Name**.



Assessment Object Type Name

Configuring an Assessment's Workflow

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

The screenshot shows the 'Configuration' tab in the Resolver interface. The 'Assessment Data' column is active, showing a table of object types and their configuration status. The table has columns for 'Object Type', 'Assessment Data', 'Option to Link to Existing', 'Fields to Sync', and 'Workflow Name'. The 'Assessment Data' column contains toggle switches that are either blue (active) or grey (inactive). The 'Option to Link to Existing' column contains checkboxes. The 'Fields to Sync' column contains edit icons. The 'Workflow Name' column contains dropdown menus and 'CONFIGURE' and '+ NEW' links.

Object Type	Assessment Data	Option to Link to Existing	Fields to Sync	Workflow Name
IT Compliance Assessment (Assessment)	☒	☐	☒	IT Compliance Assessment Workflow CONFIGURE
Authority Document (Focus)	☒	☐	☒	IT Compliance Assessment Authori CONFIGURE + NEW
Category	☒	☐	☒	IT Compliance Assessment Catego CONFIGURE + NEW
Sub Category	☒	☐	☒	IT Compliance Assessment Sub Ca CONFIGURE + NEW
Citation	☒	☐	☒	IT Compliance Assessment Citatio CONFIGURE + NEW
Control	☒	☒	☒	IT Compliance Assessment Control CONFIGURE + NEW
Issue	☐	☐	☐	Issue Status (Library) CONFIGURE + NEW
Corrective Action	☐	☐	☐	Corrective Action Status (Library) CONFIGURE + NEW
Policy	☐	☐	☐	Policy Status (Library) CONFIGURE + NEW
Regulator	☐	☐	☐	Regulator (Library) CONFIGURE + NEW

At the bottom right of the configuration area, there is a red button with a trash icon and a grey button labeled 'DONE'.

Configuration Tab

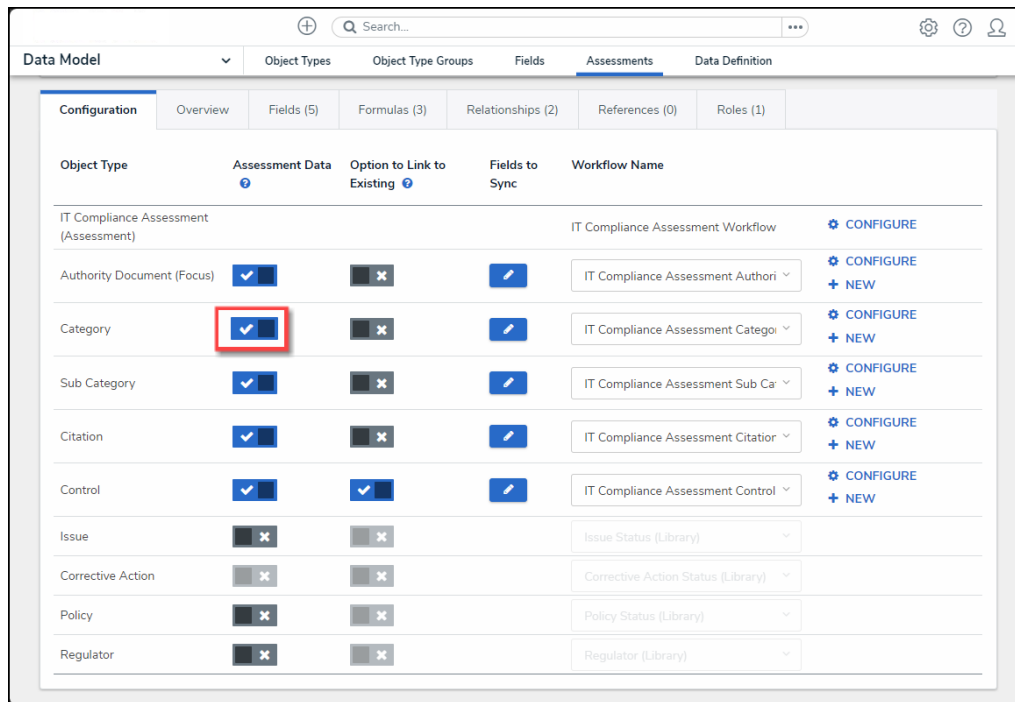
2. Click the **Assessment Data** toggle switch next to the object type to activate or deactivate the **Assessment Data** option. Please refer to the [Assessment Reference Data](#) article for more information on Assessment Reference Data.

- **Activate:** Data is not marked as reference and allows instances (clones) of its objects to be created.
- **Deactivate:** Marks data from an object type as reference data and prevents instances (clones) of its objects from being created during the assessment.



Note:

Users cannot configure object workflow types flagged as reference data in an assessment.



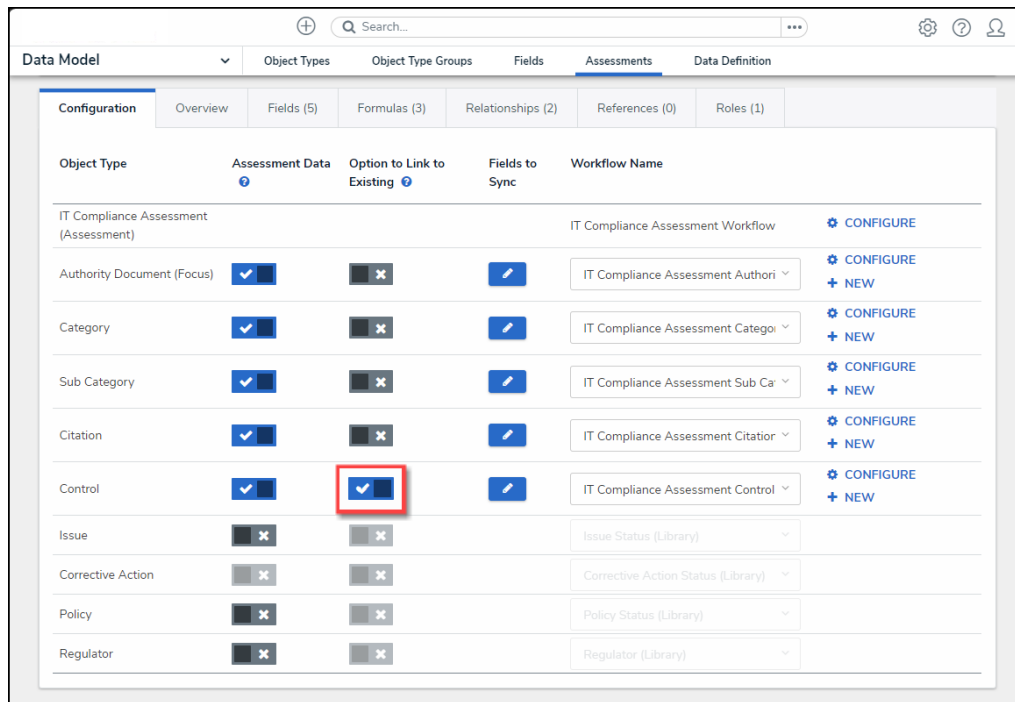
Assessment Data Toggle Switch

- Click the **Option to Link to Existing** toggle switch next to an object type to activate or deactivate the Option to Link to Existing Assessments option. Please refer to the [Activating the Link to Existing Feature](#) article for further information on the Link to Existing feature.
 - Activate:** Allows other assessments to reuse the instances (clones) from this assessment.
 - Deactivate:** Removes the ability to reuse clones from other assessments on the current assessment.



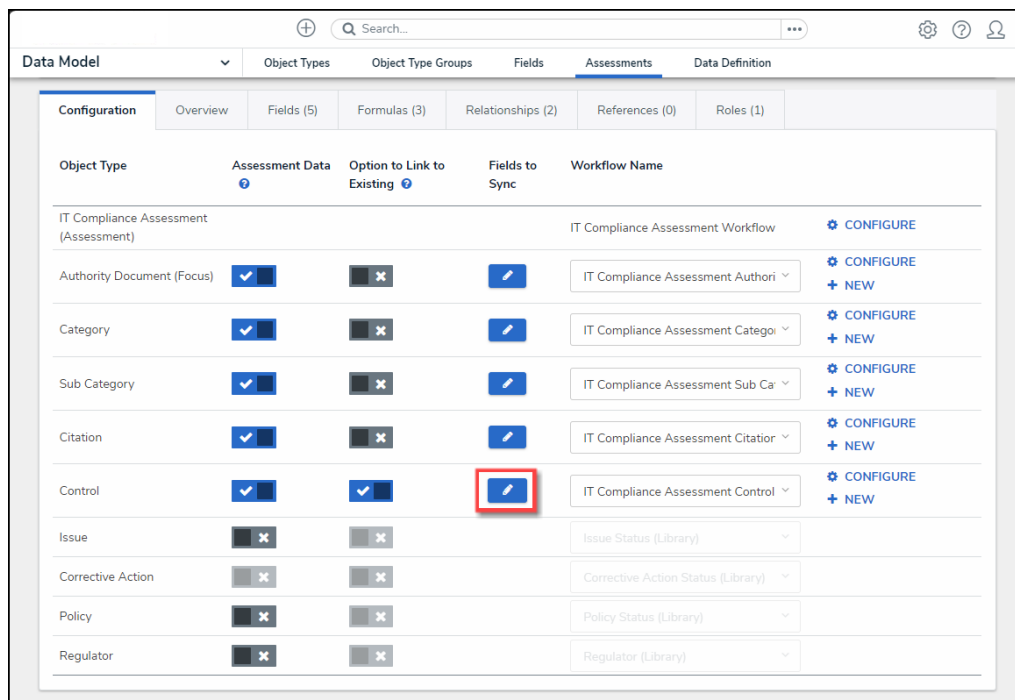
Note:

The Assessment Data toggle switch must be activated in order to activate the Option to Link to Existing Assessments feature.



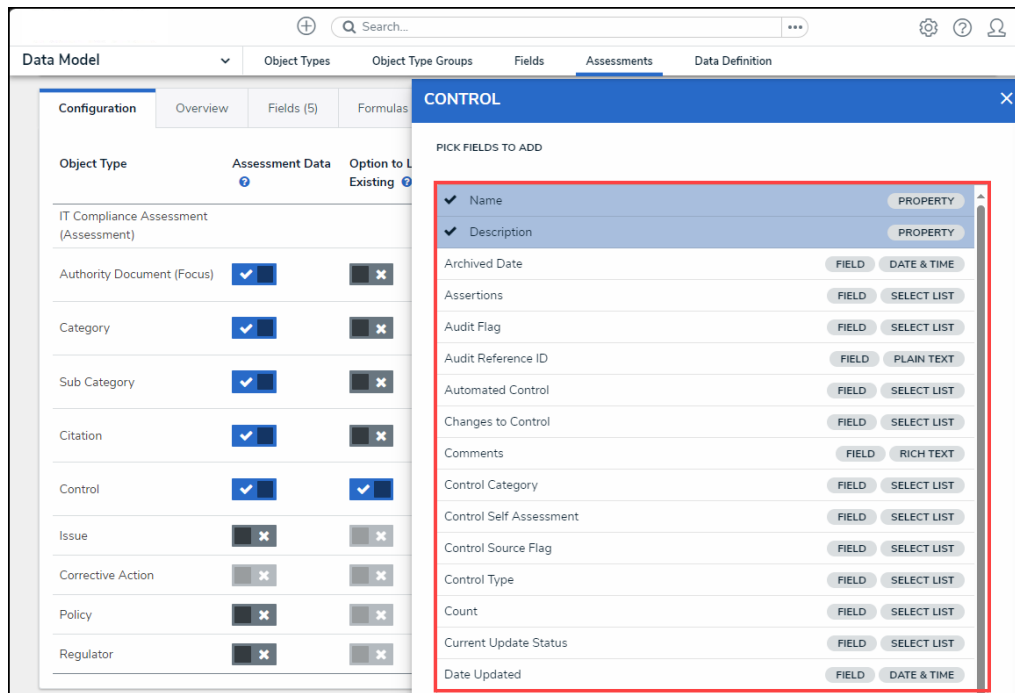
Option to Link to Existing Toggle Switch

- Click the **Edit** button under the **Fields to Sync** column next to an object type.



Edit Button

- From the **Pick Fields to Add** pop-up select which field will be updated when the user pushes an update to an assessment by clicking properties and fields.



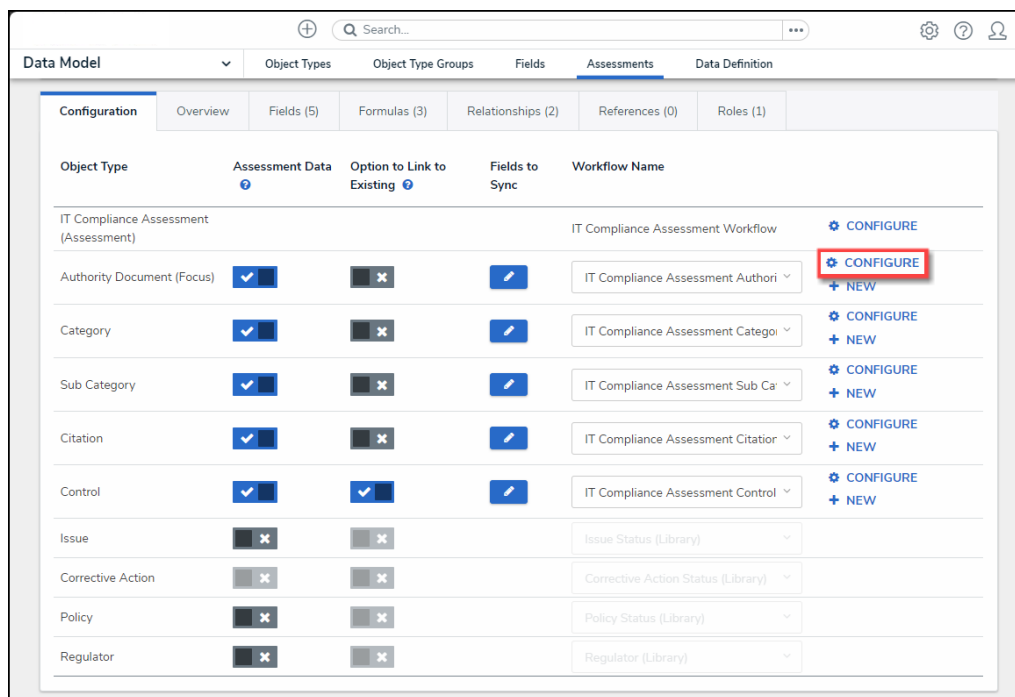
Pick Fields to Add Pop-up



Note:

The Assessment's focus object, relationships, references, roles, attachments, images, files, or web links associated to an assessment cannot be updated.

6. Click the **Configure** link.



Configure Link

- The **Admin: Edit Workflow** screen will open allowing users to edit the existing assessment workflow.

The screenshot shows the 'Admin: Edit Workflow' interface. At the top, there's a search bar and navigation tabs: Data Model, Object Types, Object Type Groups, Fields, Assessments, and Data Definition. The main title is 'Admin: Edit Workflow'. Below it, the workflow name 'IT Compliance Assessment Authority Document Workflow' is displayed with an edit icon. The 'States' section contains two states: 'CREATION' and 'IN SCOPE FOR ASSESSMENT'. Each state has a 'TRIGGERS' section with an 'ADD TRIGGER' button and a 'TRANSITIONS' section. The 'CREATION' state has a transition 'Create' leading to 'In Scope for Assessment'. The 'IN SCOPE FOR ASSESSMENT' state has a transition 'Begin Assessment' leading to 'Assessment in Progress' and another transition 'OE: IT Compliance Assessment to Authority Document. Send to In Progress' leading to 'Assessment in Progress'. Buttons for 'REORDER' and '+ ADD STATE' are at the top right of the states section.

Admin: Edit Workflow Screen

- (Optional) Click the **Workflow Name** dropdown menu to select a workflow if multiple workflows exist for the object type.

The screenshot shows the 'Workflow Name Dropdown Menu' within the 'Assessments' tab. The table lists object types and their associated workflows. The 'Authority Document (Focus)' row has a dropdown menu open, showing 'IT Compliance Assessment Authority' selected. The table has columns: Object Type, Assessment Data, Option to Link to Existing, Fields to Sync, and Workflow Name. The 'Workflow Name' column contains dropdown menus for each object type.

Object Type	Assessment Data	Option to Link to Existing	Fields to Sync	Workflow Name
IT Compliance Assessment (Assessment)				IT Compliance Assessment Workflow
Authority Document (Focus)	☒	☐	☒	IT Compliance Assessment Authority
Category	☒	☐	☒	IT Compliance Assessment Category
Sub Category	☒	☐	☒	IT Compliance Assessment Sub Category
Citation	☒	☐	☒	IT Compliance Assessment Citation
Control	☒	☒	☒	IT Compliance Assessment Control
Issue	☐	☐		Issue Status (Library)
Corrective Action	☐	☐		Corrective Action Status (Library)
Policy	☐	☐		Policy Status (Library)
Regulator	☐	☐		Regulator (Library)

Workflow Name Dropdown Menu

- Click the **New** link to create a new workflow for object types **not** flagged as reference data.

+

Search...

...

Data Model

Object Types

Object Type Groups

Fields

Assessments

Data Definition

Configuration

Overview

Fields (5)

Formulas (3)

Relationships (2)

References (0)

Roles (1)

Object Type	Assessment Data	Option to Link to Existing	Fields to Sync	Workflow Name	
IT Compliance Assessment (Assessment)				IT Compliance Assessment Workflow	CONFIGURE
Authority Document (Focus)	☒	☐	☐	IT Compliance Assessment Authori	CONFIGURE + NEW
Category	☒	☐	☐	IT Compliance Assessment Catego	CONFIGURE + NEW
Sub Category	☒	☐	☐	IT Compliance Assessment Sub Ca	CONFIGURE + NEW
Citation	☒	☐	☐	IT Compliance Assessment Citator	CONFIGURE + NEW
Control	☒	☒	☐	IT Compliance Assessment Control	CONFIGURE + NEW
Issue	☐	☐		Issue Status (Library)	
Corrective Action	☐	☐		Corrective Action Status (Library)	
Policy	☐	☐		Policy Status (Library)	
Regulator	☐	☐		Regulator (Library)	

New Link