

# Assessment Data & Reference Data

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## Overview

When configuring an assessment's workflow(s), Administrators can choose if instances (clones) of the objects added to the assessment will be created or if they will be used only as reference data (important secondary data that needs to be included, but not actually assessed). This is done by enabling or disabling the **Assessment Data** option in the **Configuration** tab from the **Edit Assessment** page.

By default, the **Assessment Data** option is enabled for all the object types on the **Configuration** tab, which is populated based on the assessment's [data definition](#).

- **If Assessment Data is enabled:** Instances of objects added to the [dimension](#), [relationship](#), or [reference](#) fields on an assessment are created. To prevent unnecessary duplicate data, objects that were already cloned in an assessment are not cloned again if they're added to a relationship or reference field on the same assessment. For example, Assessment Data is enabled for the Control object type. The Control 1 object was added to Assessment A and the instance, Control 1.1, was created, but additional instances of Control 1 are not created when this object is added to the Risk relationship on Assessment A. However, adding Control 1 to Assessment B will create an additional instance (Control 1.2) because this object was not previously cloned in this particular assessment. This applies to library and assessment objects.
- **If Assessment Data is disabled:** Objects added to the [dimension](#), [relationship](#), or [reference](#) fields on an assessment are linked to the relationship/reference and/or assessment objects, but instances (clones) are not created. For example, Assessment Data is disabled for the Control object type. The Control 1 object was added to Risk Assessment A and the Risk relationship on Assessment A, but no clones of Control 1 are created. This applies to library and assessment objects on new and launched assessments.



**Note:**

You cannot create or configure workflows for object types added to assessments unless the **Assessment Data** option is enabled. Additionally, disabling **Assessment Data** for a [root object type](#) will also disable the option for any leaf (relationship or reference) object types in the data definition.

In the screenshot below, only objects from the Process object type will have instances created, while the IT Application and Risk object types, including the relationships and references saved to the Risk object type (i.e., Control, Issue, Corrective Action, and Test), will not have any instances created should any of their objects be added to the assessment as dimensions or relationship or reference objects.

| Configuration                       |                                     |                            |                                     |                                       |  |
|-------------------------------------|-------------------------------------|----------------------------|-------------------------------------|---------------------------------------|--|
| Overview                            |                                     |                            |                                     |                                       |  |
| Fields (19)                         |                                     |                            |                                     |                                       |  |
| Formulas (3)                        |                                     |                            |                                     |                                       |  |
| Relationships (1)                   |                                     |                            |                                     |                                       |  |
| References (3)                      |                                     |                            |                                     |                                       |  |
| Roles (3)                           |                                     |                            |                                     |                                       |  |
| Object Type                         | Assessment Data                     | Option to Link to Existing | Fields to Sync                      | Workflow Name                         |  |
| Internal Audit Project (Assessment) |                                     |                            |                                     | Internal Audit Project Workflow       |  |
|                                     |                                     |                            |                                     |                                       |  |
| Process (Focus)                     | <input checked="" type="checkbox"/> | <input type="checkbox"/>   | <input checked="" type="checkbox"/> | Internal Audit Project - Process Work |  |
|                                     |                                     |                            |                                     |                                       |  |
| Risk                                | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Risk Status (Library)                 |  |
| Control                             | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Control Status (Library)              |  |
| Issue                               | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Issue Status (Library)                |  |
| Corrective Action                   | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Corrective Action Status (Library)    |  |
| Citation                            | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Citation (Library)                    |  |
| Policy                              | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Policy Status (Library)               |  |
| Asset                               | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Asset (Library)                       |  |
| Requirement                         | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Requirement Status (Library)          |  |
| Request                             | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Request Status (Library)              |  |
| Test                                | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Test Status (Library)                 |  |
| Objective                           | <input type="checkbox"/>            | <input type="checkbox"/>   |                                     | Objective Status (Library)            |  |

Configuration Tab

## Important Notes

- When working with assessments, only one version of a child object's clone can be linked to a given parent. For example, only one version of a Control can be linked to a given Risk. If Control 421.1 is already linked, Control 421.1.1 (a separate instance) cannot be linked to the same Risk. This is expected behaviour to prevent duplication and confusion in control mapping.