Launch an Assessment

Last Modified on 11/12/2024 3:17 pm EST

Overview

Assessments are used to evaluate your organization's Requirements and Controls against compliance frameworks for a particular business unit.

User Account Requirements

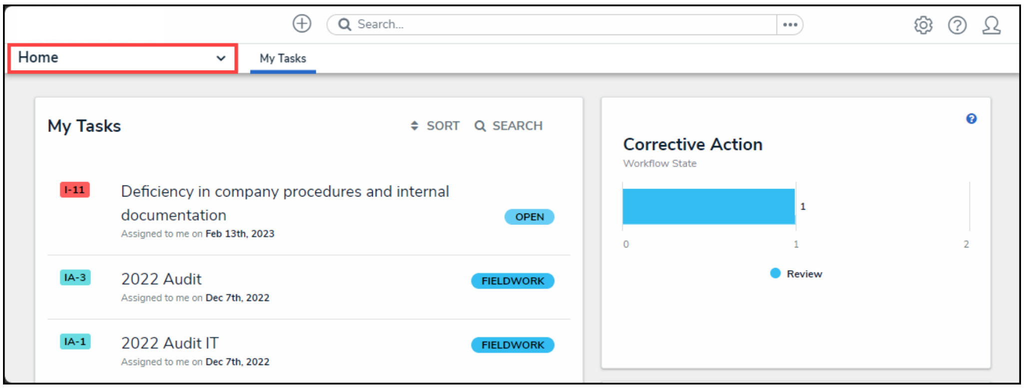
Only users in the **Compliance Team** user group can launch Compliance Assessments.

Related Information/Setup

Please refer to the Scope an Assessment in Compliance Management article for further information on scoping a Compliance Assessment.

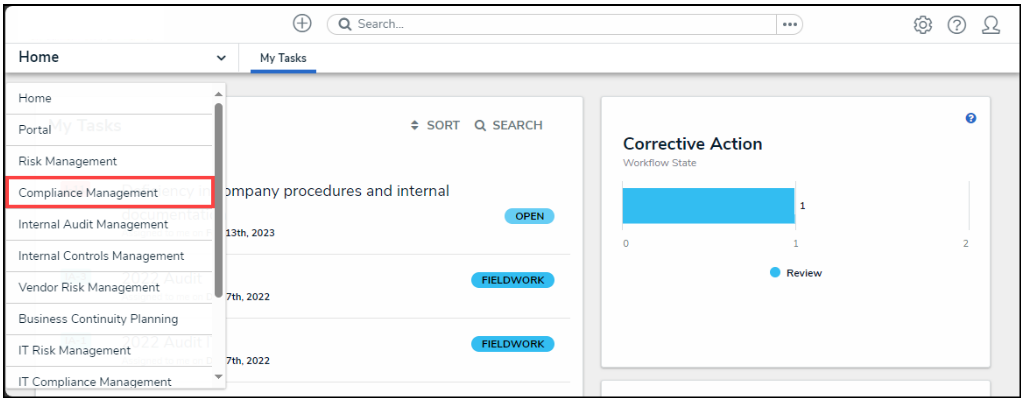
Navigation

1. From the ***Home*** screen, click the **Home** dropdown menu.



Home Dropdown Menu

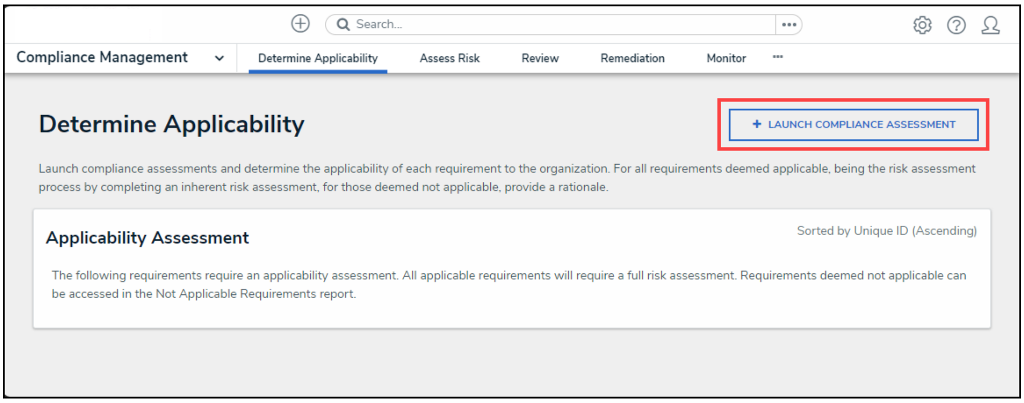
2. Select **Compliance Management** from the dropdown menu.



Compliance Management Link

Launching a Compliance Management Assessment

1. From the ***Determine Applicability*** screen, click the **+ Launch Compliance Assessment** button.



+ Launch Compliance Assessment Button

2. From the ***Create a New Compliance Assessment*** screen, enter an assessment name in the **Compliance Assessment Name** field. The **Compliance Assessment Name** is used to identify the assessment throughout the system and for historical purposes.

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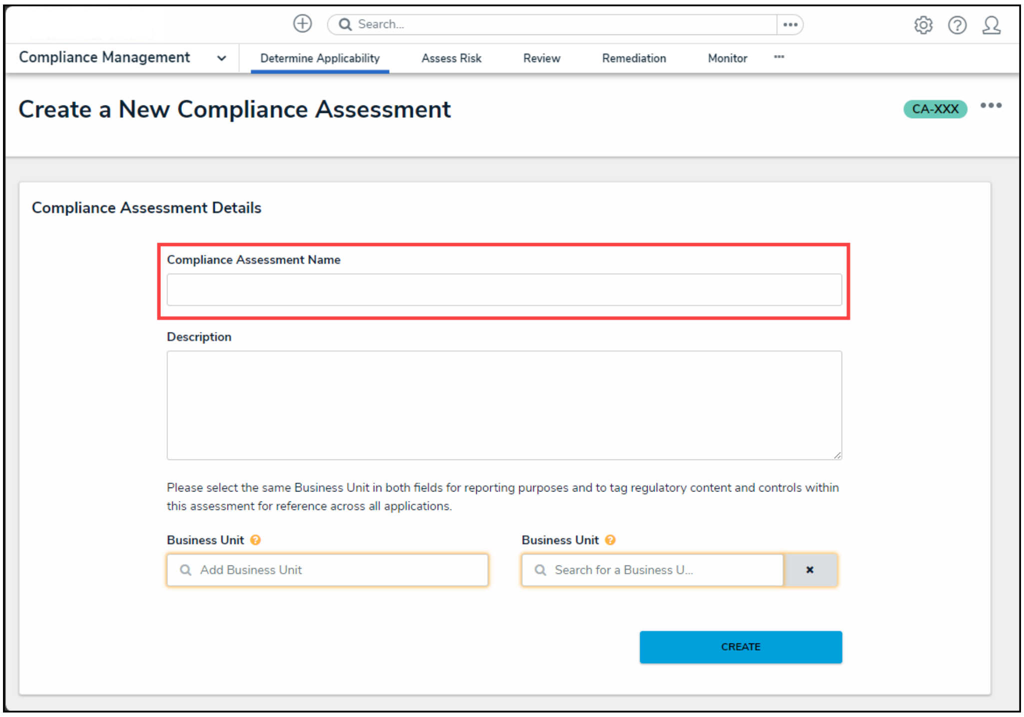
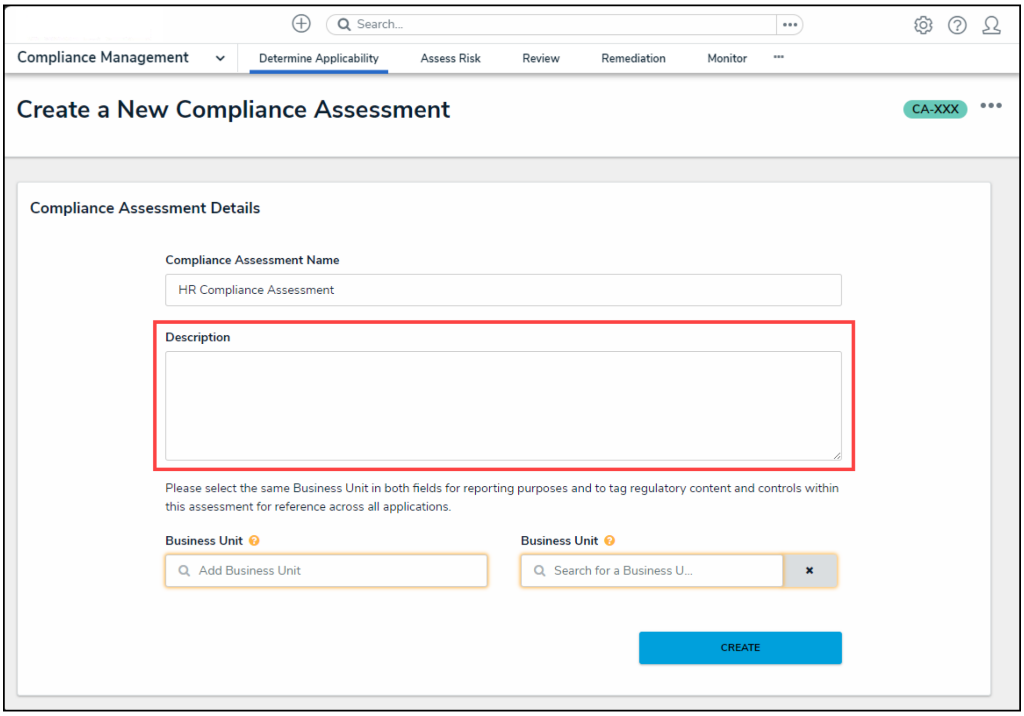


Compliance Assessment Name Field

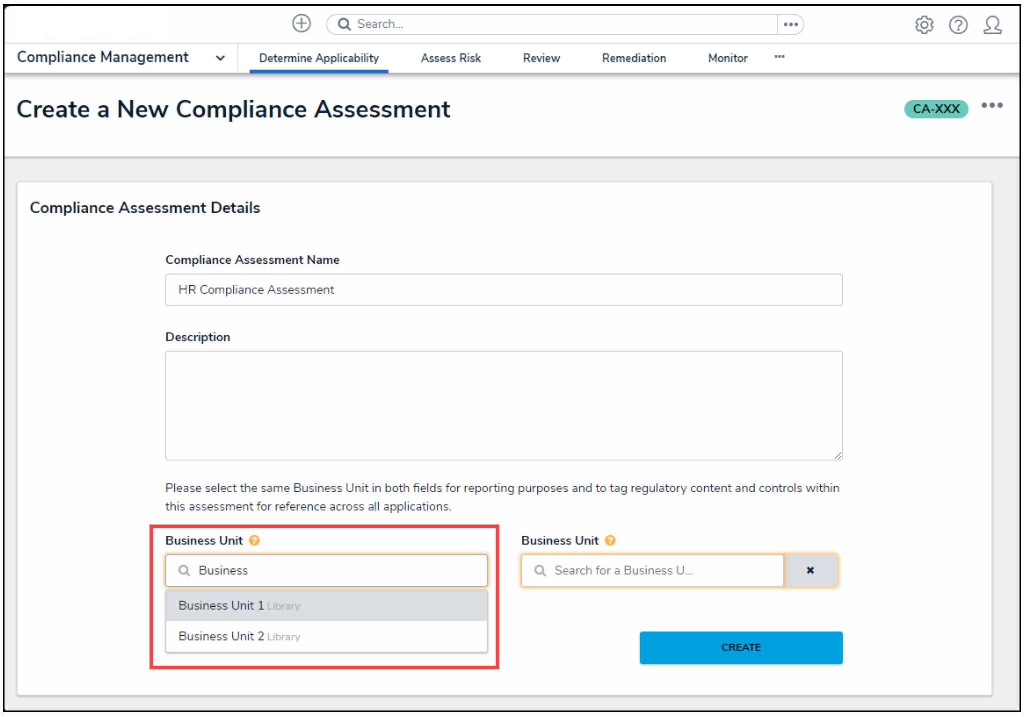
3. **(Optional)** Enter a brief description outlining the compliance assessment in the **Description** field.



Description Field

4. Enter a keyword in the **Business Unit** field and click on a **Business Unit** to add it to the assessment.

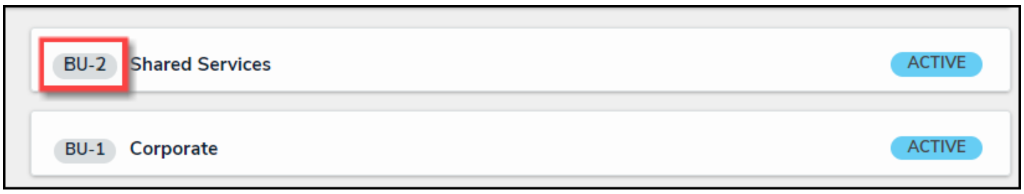
- This **Business Unit** field creates a reporting connection to the assessment and allows users to create assessment reports (reporting path Company>Business Unit>Assessment).



Business Unit Field

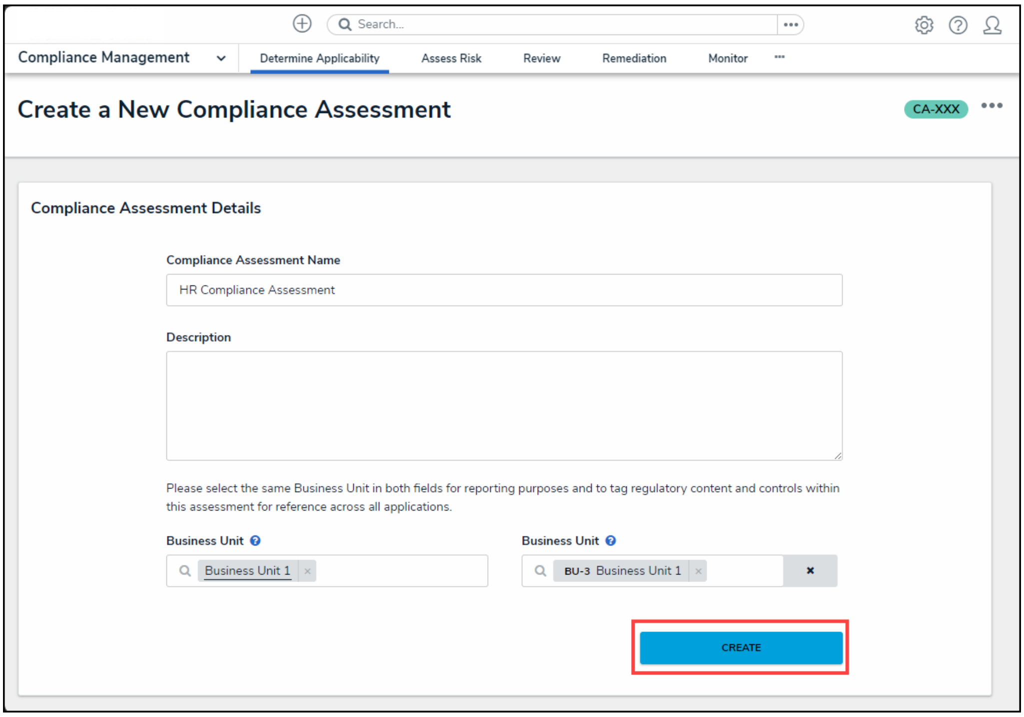
5. Enter the keyword you used in step 4 in the second **Business Unit** field and select the same **Business Unit** tag you used in the first **Business Unit** field.

    - This **Business Unit** field is the assessment dimension, which tags assessment data to the selected **Business Unit**. This Tag appears next to the object throughout the system (global searches, views, relationship tables, etc.).



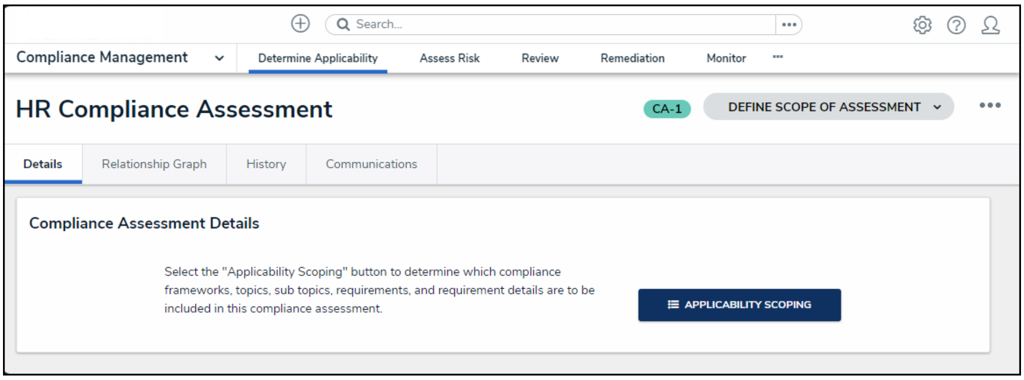
Business Unit Tag

6. Click the **Create** button to launch the assessment.



Create Button

7. The ***Compliance Assessment Details*** tab will appear. Now that the Compliance Assessment is launch the next step is to scope the assessment. Please refer to the Scope an Assessment in Compliance Management article for further information on scoping a Compliance Assessment.



Compliance Assessment Details tab