

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

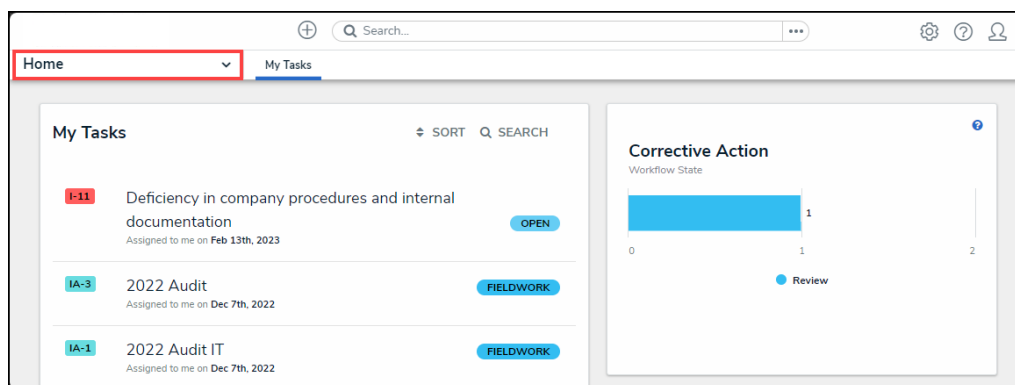
Only users in the **Compliance Team** user group can launch Compliance Assessments.

Related Information/Setup

Please refer to the [Scope an Assessment in Compliance Management](#) article for further information on scoping a Compliance Assessment.

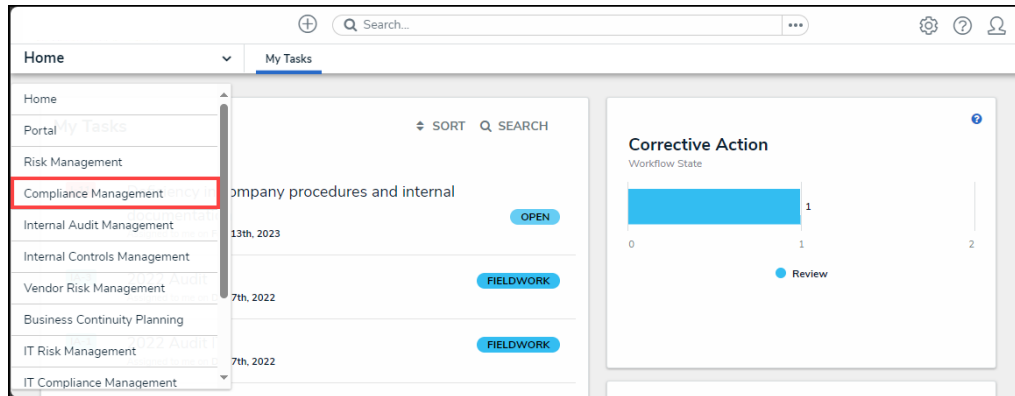
Navigation

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



Home Dropdown Menu

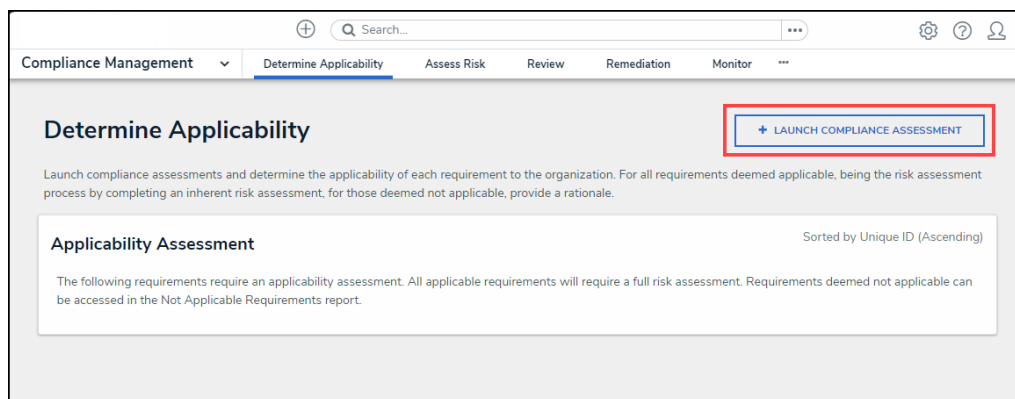
2. Select **Compliance Management** from the dropdown menu.



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.

The screenshot shows the 'Create a New Compliance Assessment' page in the Resolver application. The page has a top navigation bar with 'Compliance Management' selected and tabs for 'Determine Applicability', 'Assess Risk', 'Review', 'Remediation', and 'Monitor'. The main heading is 'Create a New Compliance Assessment' with a 'CA-XXX' identifier. Below this is the 'Compliance Assessment Details' section. The 'Compliance Assessment Name' field is highlighted with a red border. Below it is a 'Description' text area. A note states: 'Please select the same Business Unit in both fields for reporting purposes and to tag regulatory content and controls within this assessment for reference across all applications.' There are two 'Business Unit' dropdown menus, each with a search icon and a placeholder text. A blue 'CREATE' button is at the bottom right.

Compliance Assessment Name Field

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

This screenshot shows the same 'Create a New Compliance Assessment' page, but now the 'Description' text area is highlighted with a red border. The 'Compliance Assessment Name' field now contains the text 'HR Compliance Assessment'. The 'Business Unit' dropdown menus remain empty. The 'CREATE' button is still visible at the bottom right.

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.

The screenshot shows the 'Create a New Compliance Assessment' page. At the top, there's a navigation bar with 'Compliance Management' selected, and sub-tabs for 'Determine Applicability', 'Assess Risk', 'Review', 'Remediation', and 'Monitor'. The main heading is 'Create a New Compliance Assessment' with a green 'CA-XXX' tag. Below this is a 'Compliance Assessment Details' section. It contains a 'Compliance Assessment Name' field with 'HR Compliance Assessment' entered, and a 'Description' text area. A note states: 'Please select the same Business Unit in both fields for reporting purposes and to tag regulatory content and controls within this assessment for reference across all applications.' There are two 'Business Unit' dropdowns, both showing 'Business Unit 1'. A blue 'CREATE' button is highlighted with a red rectangle at the bottom right of the form.

Create Button

- 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.

The screenshot shows the 'HR Compliance Assessment' details page. The navigation bar is the same, but the sub-tab 'Determine Applicability' is now active. The main heading is 'HR Compliance Assessment' with a green 'CA-1' tag and a 'DEFINE SCOPE OF ASSESSMENT' button. Below this is a tabbed interface with 'Details', 'Relationship Graph', 'History', and 'Communications'. The 'Details' tab is selected. The 'Compliance Assessment Details' section contains a note: 'Select the "Applicability Scoping" button to determine which compliance frameworks, topics, sub topics, requirements, and requirement details are to be included in this compliance assessment.' A blue button labeled 'APPLICABILITY SCOPING' is visible at the bottom right of the details section.

Compliance Assessment Details tab