

Activating the Link to Existing Feature

Last Modified on 11/30/2023 2:10 pm EST

Overview

The **Link to Existing** feature allows end-users to share data across assessments and applications, which helps to prevent assessing the same objects multiple times. When activated, users can add previously assessed data when scoping and launching another assessment (e.g., sharing controls across business units or between various applications, like Risk Management and Compliance Management). Users can also add previously assessed objects via an Advanced Relationship Table.

User Account Requirements

The users account you use to log into Resolver must have Administrator permission to activate the Link to the existing feature.

Related Information/Setup

Please refer to the Scope & Launch category for more information on scoping and launching an assessment.

Please refer to the Rely On Shared Objects in a Relationship Table article for more information on sharing previously assessed objects on an Advanced Relationship table.

Navigation

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

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Home	~	My Tasks		_



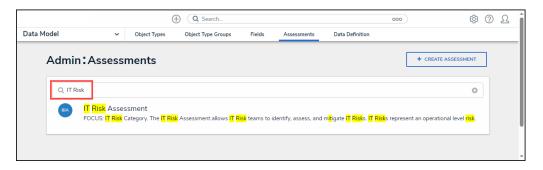
2. From the *Admin Overview* screen, click the **Assessments** tile under the **Data Model** section.



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Data Model			Views			
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Object Types		Object Type Groups	Configurable Forms		Data Visualizations	
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Fields	Assessments	Data Definitions	Dashboard Data Sets	Dashboard Builder		

Assessments Tile

3. From the *Admin: Assessments* screen, enter an assessment keyword (e.g., Assessment Name) in the search field to narrow the search results.



Search Field

4. Click on an Assessment Name link.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admin:	Assessr	nents					+ CRE	ATE ASSESSMENT]	
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	<mark>F Risk</mark> Asses OCUS: <mark>IT Risk</mark> C		<mark>k</mark> Assessment allows <mark>IT R</mark>	<mark>isk</mark> teams to ic	lentify, assess, and	m <mark>it</mark> igate <mark>IT Risk</mark> s. <mark>IT Risk</mark>	s represent an oper	ational level <mark>risk</mark> .		

Assessment Name Link

Activating the Link to Existing Feature

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



lodel	✓ 0	bject Types	Object Type Groups	Fields	Assessments	Data D	efinition		
Configuration	Overview	Fields (1)	Formulas (1)	Relationships	(1) Referen	ices (1)	Roles (0)		
Object Type	Asse Q	essment Data	Option to Link to Existing 😧	Fields to Sync	Workflow Na	me			
IT Risk Assessmen (Assessment)	nt				IT Risk Asses	ment Wor	rkflow		
IT Risk Category (Focus) 🗸		×	1	IT Risk Ass	essment IT	Risk Categor 🐣	CONFIGURENEW	
Risk	~		×	1	IT Risk Ass	essment R	isk Workflow 🐣	CONFIGURENEW	
Asset		×	×						
Vulnerability		×	×						
Control	~		~	1	IT Risk Ass	essment C	ontrol Workflc 🗸	CONFIGURENEW	
Policy		×	×						
Issue		×	×						
Corrective Action		×	×						
Issue		×	×						
Corrective Action		×	×						
Threat		*							

Configuration Tab

2. Activating the toggle switch on the **Assessment Data** column for the **Focus Object Type** will activate/deactivate the Assessment Data toggle switch for all other object types.



Caution:

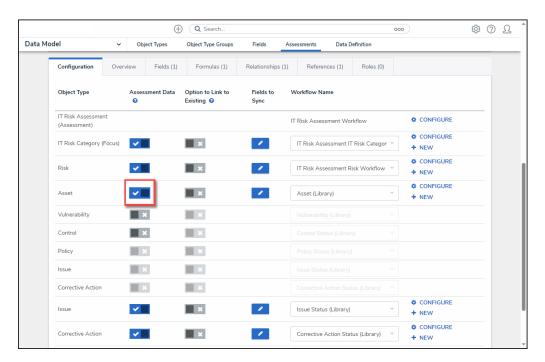
Resolver currently does not support the **Link to Existing** *feature for Focus objects. Toggling the switch for a focus object will not result in any change.*

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Data Mo	del	~	Object Types	Object Type Groups	Fields	Assessments	Data D	efinition			
	Configuration	Overview	Fields (1)	Formulas (1)	Relationships	(1) Referen	ices (1)	Roles (0)			
	Object Type	As 6	sessment Data	Option to Link to Existing 😧	Fields to Sync	Workflow Na	me				
	IT Risk Assessme (Assessment)	ent				IT Risk Assess	sment Wo	rkflow	CONFIGURE		
	IT Risk Category	(Focus)		×	1	IT Risk Asse	essment IT	Risk Categor 🐣	CONFIGURE		
	Risk			×	1	IT Risk Asse	essment R	isk Workflow 👋	CONFIGURE		
	Asset	~	-	×	1	Asset (Libra	ary)	~	CONFIGURENEW		
	Vulnerability	~	-	×	1	Vulnerabilit	y (Library)	~	CONFIGURE		
	Control	~		×	1	IT Risk Asse	essment C	ontrol Workflc $^{\vee}$	CONFIGURE H NEW		
	Policy	~	-	×	1	Policy Statu	ıs (Library)	×	CONFIGURE		
	Issue	~		×	1	Issue Status	s (Library)	~	CONFIGURE		
	Corrective Action	•		×	1	Corrective A	Action Stat	tus (Library) 🛛 👋	CONFIGURE		
	Issue			×	1	Issue Status	s (Library)	~	CONFIGURE		

Focus Object Type - Assessment Data Toggle Switch



3. The toggle switch on the **Assessment Data** column must be activated for an **Object Type** to activate the toggle switch on the **Option to Link to Existing** column. The toggle switch on the **Option to Link to Existing** column will be greyed out if the toggle switch on the **Assessment Data** column is deactivated.



Assessment Data Toggle Switch

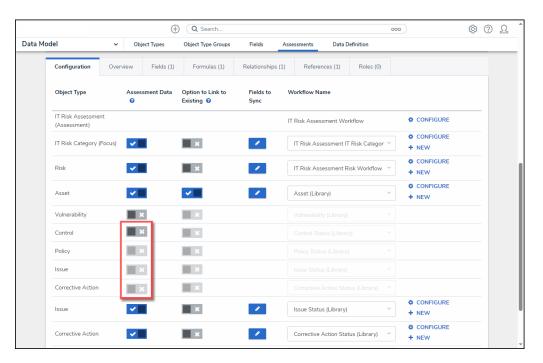
4. Click the toggle switch on the **Option to Link to Existing** column next to **Object Types** to activate the **Link to Existing** feature. The toggle switch will appear blue when the feature is active for the selected object type.

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Model	~	Object Types	Object Type Groups	Fields	Assessments	Data D	efinition		
Configuration	Overv	iew Fields	(1) Formulas (1)	Relationships	(1) Referer	nces (1)	Roles (0)		
Object Type		Assessment Da	ata Option to Link to Existing 😧	Fields to Sync	Workflow Na	me			
IT Risk Assessmen (Assessment)	nt				IT Risk Asses	sment Wo	rkflow		
IT Risk Category (Focus)	✓	×	1	IT Risk Ass	essment IT	Risk Categor 🗡	CONFIGURE	
Risk		~	×	1	IT Risk Ass	essment R	isk Workflow 🗠	CONFIGURE	
Asset		~		1	Asset (Libra	ary)	~	CONFIGURE	
Vulnerability		×							
Control		×	×						
Policy		×	×						
Issue		×	×						
Corrective Action		×	×						
Issue		~	×	1	Issue Statu	s (Library)	~	CONFIGURE	
Corrective Action		~	×	1	Corrective	Action Stat	tus (Library)	CONFIGURE	



Option to Link to Existing Toggle Switch

5. Some object types relate to an object type above it. When activating/deactivating a toggle switch for an object type, the toggle switch for all related object types below will also be activated/deactivated.



Deactivated Toggle Switches

del	~	Object Types	Object Type Groups	Fields	Assessments D	Data Definition		
Configuration	Overvie	w Fields (1) Formulas (1)	Relationships	(1) References (1) Roles (0)		
Object Type		Assessment Dat	a Option to Link to Existing 😧	Fields to Sync	Workflow Name			
IT Risk Assessmer (Assessment)	nt				IT Risk Assessmen	t Workflow	CONFIGURE	
IT Risk Category (Focus)	✓ <u> </u>	×	1	IT Risk Assessm	ent IT Risk Categor 👻	 CONFIGURE NEW 	
Risk		✓	×	1	IT Risk Assessm	ent Risk Workflow 👋	CONFIGURENEW	
Asset		✓	~	1	Asset (Library)	~	 CONFIGURE NEW 	
Vulnerability		×	×					
Control		~	×	1	IT Risk Assessm	ent Control Workflc 🗡	CONFIGURENEW	
Policy		~	×	1	Policy Status (Lik	brary) ~	CONFIGURENEW	
Issue		~	×	1	Issue Status (Lib	rary) ~	CONFIGURENEW	
Corrective Action		-	×	1	Corrective Action	n Status (Library) 🛛 🗸	CONFIGURE NEW	
Issue			-	_	Issue Status (Lib	ranı) v	CONFIGURE	



 If an object type relates to another, hovering the cursor over an **Object Type name** will open the *Related* pop-up that tells the users which object type it relates to.



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Model	~	Object Types	Object Type Groups	Fields	Assessments	Data D	efinition			
Configuration	Overviev	w Fields (1) Formulas (1)	Relationships	(1) Referen	ices (1)	Roles (0)			
Object Type		Assessment Data	Option to Link to Existing 🔞	Fields to Sync	Workflow Na	me				
IT Risk Assessme (Assessment)	nt				IT Risk Assess	sment Wo	rkflow	CONFIGURE		
IT Risk Category	(Focus)	~	×	1	IT Risk Ass	essment IT	FRisk Categor 🗠	CONFIGURENEW		
Risk		~	×	1	IT Risk Asse	essment R	isk Workflow 💙	CONFIGURE		
Asset		~	✓	1	Asset (Libra	ary)	~	CONFIGURE		
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Corrective Action		~	×	1	Corrective A	Action Stat	tus (Library) 🛛 🗠	CONFIGURENEW		
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Related Pop-up



Users can activate/deactivate a related object type by clicking the related object type's toggle switch.

7. If the **Link to Existing** feature is activated on duplicate object types, the system will randomly pull data from one object type path.

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Issue	~	~	Issue Status (Library)
Corrective Action	~	~	Corrective Action Status × + NEW
Threat	×	×	Threat (Library) 🗸
			🖞 🗸 DONE



7. Click the **Done** button to apply all changes and return to the previous screen.



ata Model	~	Object Types	Object Type Groups	Fields	Assessments	
Issue	~	×	Is:	sue Status (Library	A ~	CONFIGURE NEW
Corrective Action	~	×	Ca	orrective Action St	atus 🗸	CONFIGURE
Threat	×	×	TI	nreat (Library)	~	

Done Button