

Launching Bulk Assessments

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Overview

Bulk assessment launch will enable users to launch multiple assessments of the same type and scope by importing a template via an Excel file.

User Account Requirements

Users must have the [Bulk Create permission](#) for a given assessment type in order to use the Bulk Assessment launch.

Related Information/Setup

For more information on using assessments in Resolver, please refer to the [Assessments](#) section.

For more information on configuring permissions, please refer to the [Workflow Permissions](#) article.

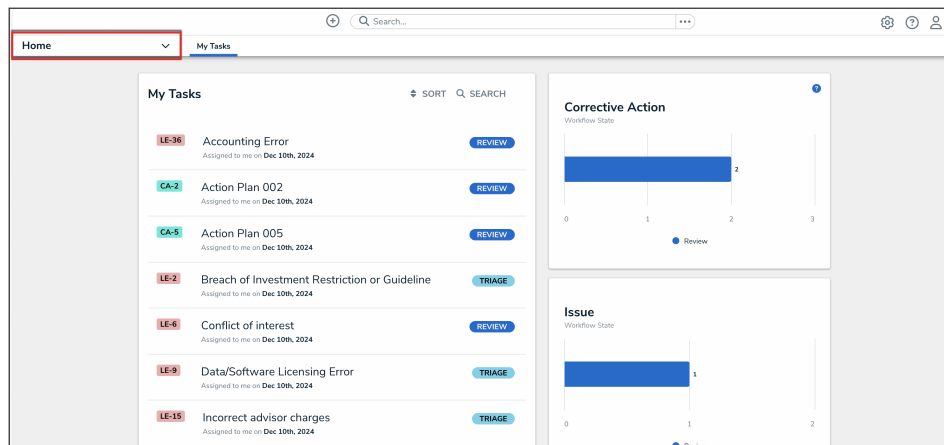
Configuration

Bulk assessment launch will only work for assessments that meet the following criteria:

- The assessment type must have a data definition and at least one dimension (object type or custom)
 - The assessment must be a Navigation form type
 - The form must have the following elements:
 - Assessment context (object type and custom dimension)
 - Assessment dimension
 - Open assessment scoping
 - The form must not have multiple initial scoping buttons
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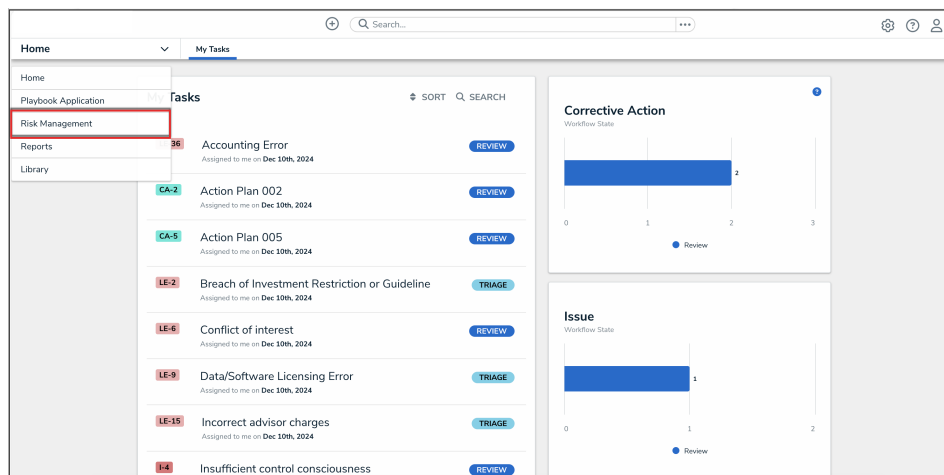
Navigation

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



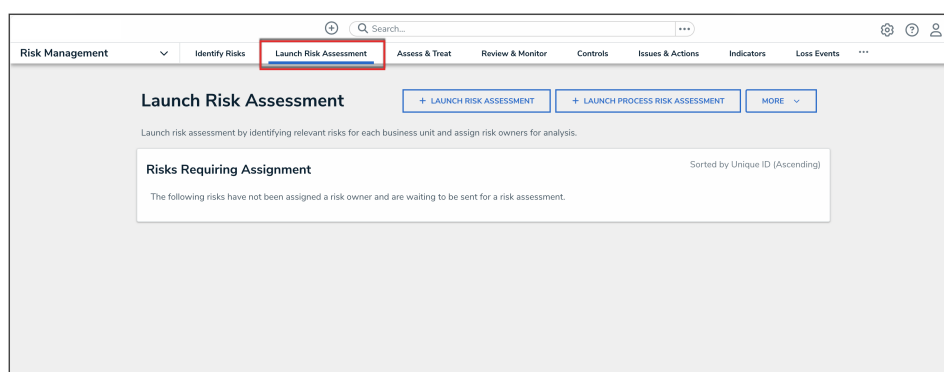
Home Dropdown Menu

- From the **Home** dropdown menu, click **Risk Management**.



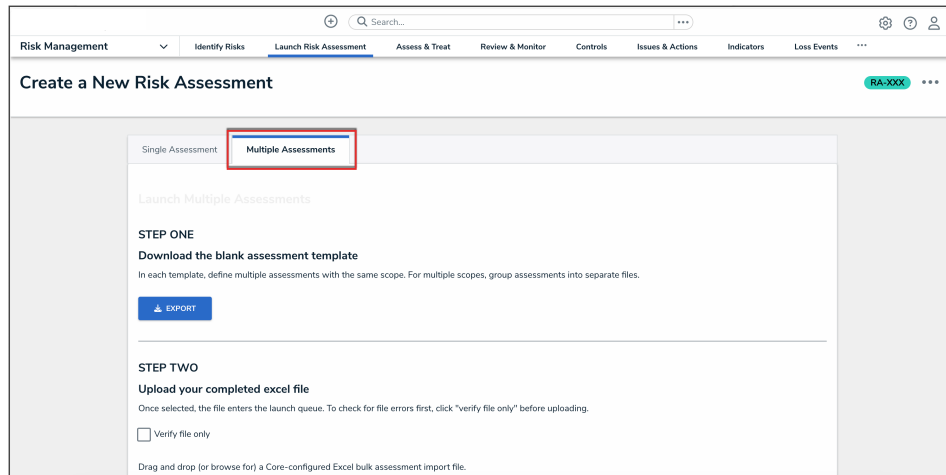
Risk Management Application

- Click the **Launch Risk Assessment** tab.



Launch Risk Assessment Tab

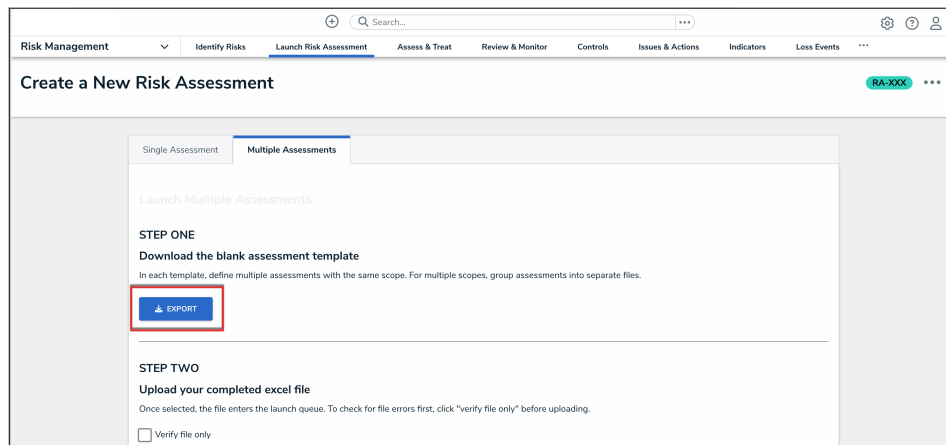
- From the **Create a New Risk Assessment** screen, click the **Multiple Assessments** tab.



Multiple Assessments Tab

Launching a Bulk Assessment

1. Under the **Step One** section, click the **Export** button to export a blank assessment template.



Export Button

2. Navigate to the Download folder on your PC and look for a filename with this naming convention: **<date of export><orgid>multipleassessmentlaunch.xlsx**
3. The blank assessment template file consists of three worksheets:
 - **Guidance:** This worksheet explains how to use the template to execute bulk assessment launch. It also includes some basic information on the assessment type this file launches and the expected inputs for the remaining worksheets.
 - **Assessments:** This worksheet is used to fill in the fields required for assessment creation. Each row on this sheet will launch one assessment. The **Risk Assessment Name** field and the dimension and custom dimension fields are mandatory.
 - **Scope:** Each assessment in a bulk launch will have the same scope as defined on this worksheet. To configure this worksheet, type an 'X' beside each object to

include in scope for the assessment launch. If a user accidentally omits a parent object of one of the selected objects, Resolver will automatically include any parent objects required to complete that branch's hierarchy when launching the assessments.

4. Fill in the necessary information and save the file to your PC.
5. Back in Resolver, under the **Step Two** section, click the **Verify file only** checkbox to check the data was entered correctly before uploading the file.

The screenshot shows the 'Launch Multiple Assessments' section of the Resolver application. It is divided into two steps: 'STEP ONE' and 'STEP TWO'. 'STEP ONE' is titled 'Download the blank assessment template' and includes an 'EXPORT' button. 'STEP TWO' is titled 'Upload your completed excel file' and includes a 'Verify file only' checkbox, which is highlighted with a red rectangular box. Below the checkbox is a large dashed-line box for file upload, with the text 'Drag file here or click to upload' and a note that 'Date field values will be imported in UTC timezone'.

Verify File Only Checkbox

- The **Verify File Only** checkbox will perform a test import without altering your data. It shows you any existing template errors and what specific fields they're occurring on. This practice will help reduce any possible confusion and you having to review your spreadsheet line by line if errors are reported.
6. If there are no file errors detected, drag and drop the file to the upload area or click the area to find and open the file for upload.

This screenshot is identical to the one above, showing the 'Launch Multiple Assessments' interface. In this view, the large dashed-line box for file upload, which contains the text 'Drag file here or click to upload', is highlighted with a red rectangular box. The 'Verify file only' checkbox remains unchecked.

Assessment Import Upload Area



Note:

Ensure the **Verify File Only** checkbox is de-selected before uploading.

7. If needed, correct any errors on the spreadsheet, save your changes, then re-upload the file.
8. Once the file is loaded, it may be placed in a queue if there is already an assessment in process.



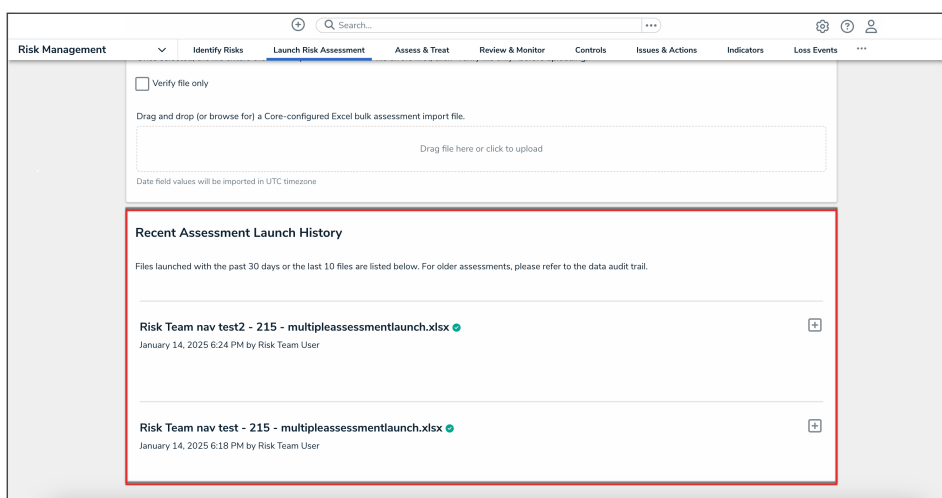
Note:

Individual assessments are prioritized over bulk assessments since these can take longer.

8. When a bulk assessment is being processed, the notification will show the name of all individual assessments being launched. Beside each individual assessment, the following status badges will appear as the assessment runs:

- **Completed** means the assessment was successfully launched
- **Failed** means the assessment launch was failed
- In progress has an animated ellipsis
- There is no indicator for an assessment that hasn't been started

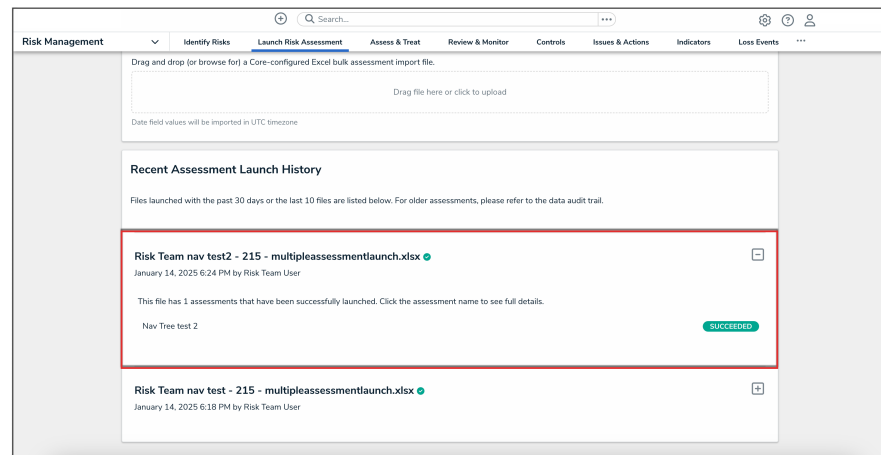
9. When the bulk assessment has been completed, it will be listed in the **Recent Assessment Launch History** section.



Recent Assessment Launch History Section

- In this section, there will be a list of bulk assessment files launched within the past 30 days or the most recent 10 files.

- Each bulk assessment launch file occupies a panel. Expanding the panel will show the name of each assessment launched by that file and whether it was successful.



Assessment Panel

- If one or more assessments failed to launch, an error icon will appear beside the name of the bulk assessment file and any failed assessments.