



Rsam Platform

Impact of Assessment Questionnaire Edits on Active Object Assessments

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Contents

- Overview3
- Questionnaire Management (before & after the Assessment Questionnaire Interface)4
 - Legacy Questionnaire Management (before AQ)4
 - Changes to the Questionnaire Management (with new AQ)4
- Details / Impacts of Publishing New and Changed Questions5
- Example Change Scenarios6
- Conclusion7

Overview

Historically, customers leveraging questionnaires in Rsam (specifically Control Types, Criticality Factors and Standards), were unable to stage alterations to those questionnaires without impacting live assessment data. This required customers to make all their questionnaire edits directly without a good workflow for staging them in their production instance before publication.

In 2017, Rsam released the new records-based method of editing questionnaires (the "Assessment Questionnaire" or "AQ" interface) which allows for additional workflow and staging of the assessment question edits before impacting actual assessments. The following document is designed to help customers understand how the questionnaire edits and publication affect ongoing object assessments, and how this differs from the original questionnaire interface.

Questionnaire Management (before & after the Assessment Questionnaire Interface)

Legacy Questionnaire Management (before AQ)

The original questionnaire system forced all questions to be edited via the admin screen. This required administrative access and provided no capabilities for integrated workflow, searching, bulk updates, etc.

- Any changes made in the question library (Controls / Criticality Factors) would have an immediate impact on related objects the moment the change was saved.
- There was no ability to draft changes / review them in the production instance before publishing.
- Existing objects would immediately be impacted by any new question added to the object type, and likewise, questions would be immediately removed from existing objects as they were removed from the object type.

Changes to the Questionnaire Management (with new AQ)

In the new assessment questionnaire approach, Rsam has leveraged "records" for the modification of questions / responses. Using records allows for many enhanced features which include the following:

- Customers can now edit questions / create new questions in "Draft" mode without impacting existing objects and then publish the questions in bulk when ready.
- Customers can now establish a proper workflow for adding, editing, reviewing, and managing questions.
- Customers can now leverage record-based features like searching, reporting, exporting, importing, bulk editing, and inline editing to more effectively manage assessment questions.
- For object assessments that are in progress, customers can now protect those objects from being impacted by newly added questions. This allows those objects to complete their assessment workflow using all and only the questions that were active at the time the assessments were created while also allowing for newly created assessments to begin immediately using the latest additions / removals of questions.

Details / Impacts of Publishing New and Changed Questions

While managing questions in the library, there are many activities that a customer can perform without impacting an in-flight object assessment. At the same time, there are many activities that do have an impact. The following summary shows what can and cannot be done without impacting live assessments.

What you can do WITHOUT impacting existing object assessments:

- Edit assessment questions in draft mode.
- Edit possible responses / add new possible responses in draft mode.
- Add new (active) assessment questions and responses to an object type.

What actions WILL impact existing object assessments:

- Changes to Standards related to active questions / responses
- Changes to published (active) assessment questions that are already in use by an object including the questions, possible responses, auto-answers, domains, etc
- Disassociating the object type

The following table shows the activity and the respective impact on live objects.

Activity	Impacts Live Objects
Add new questions / responses in Draft	No
Edit questions and responses in Draft	No
Publish new questions to Active	No (unless object is refreshed)
Changing standards for question responses	Yes
Publishing changes made to existing questions / responses that are already included in the in-flight assessments	Yes
Changes to Standards, Auto-Answers, Domains for published questions / responses	Yes
Disassociating the object type	Yes

Example Change Scenarios

Consider the following scenarios to better understand how changes made to assessment questions will impact an object that is currently undergoing assessment.

- a) Object "X" has been created and is in the middle of an assessment.
- b) Two existing Assessment Questions are edited (in draft) that are already associated with that object.
 - i. The object still shows the old active questions and responses.
- c) Two new Assessment Questions are associated with that object type and then published.
 - i. The object does NOT get the new questions unless the object is refreshed.
- d) Two other assessment questions that are already associated with that object are edited AND published (in active).
 - i. The object shows the changed questions / responses as they were published.
 - ii. These questions already exist in the object and existing questions always reflect the active items from the library.
- e) The standards for the questions are updated for gap generation.
 - i. Those modified standards are in effect for the object. So, when the object has a report run or gap generation, the results will reflect the changed standards.

Conclusion

While the new Assessment Question method has numerous advantages for both end user and administrator, it is important to manage the changes and publications of those changes as it relates to active object assessments. Please refer to this guide when making such changes.