

Assessments - Restrict Access/update actions for Users

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This article explains setting up an Assessment with access restricted to specific users in the organisation.

Step 1: Build the Assessment

Step 2: Setup the Workflow Controller

1. From Administration, click **Workflows > Workflow Controllers**.
2. In the panel, click **New**.
3. Add **Name**.

Dashboard

Administration

Workflow

Workflow Controllers

New

Workflow controllers

Dashboard / Administration / Workflow / Workflow Controllers / New

Details

Type

Assessment Workflow Controller

Name*

Save Workflow controller

Cancel

In the Controller screen, add the Group assignments for each State and Transitions.

States		
Name	Group	
new	Directors	Edit
approved	Directors	Edit
cancelled	Directors	Edit
draft	Directors	Edit
ongoing		Edit
submitted_for_approval		Edit
archived	Directors	Edit

Transitions					
Action Name	From State	To State	Required Role Name	Performed By Group	
create	new	draft	assessment_runner	Directors	<button>Edit</button>
archive	approved	archived	assessment_approver	Directors	<button>Edit</button>
ongoing_assessment	draft	ongoing	assessment_runner	Directors	<button>Edit</button>
cancel	draft	cancelled	assessment_runner	Directors	<button>Edit</button>
approve	draft	approved	assessment_approver	Directors	<button>Edit</button>
perform	ongoing	ongoing	assessment_runner	Directors	<button>Edit</button>
cancel	submitted_for_approval	cancelled	assessment_approver	Directors	<button>Edit</button>
approve	ongoing	approved	assessment_approver	Directors	<button>Edit</button>
cancel	ongoing	cancelled	assessment_runner	Directors	<button>Edit</button>
reject	submitted_for_approval	draft	assessment_approver	Directors	<button>Edit</button>
approve	submitted_for_approval	approved	assessment_approver	Directors	<button>Edit</button>
submit for approval	ongoing	submitted for approval	assessment_runner		<button>Edit</button>

This will control the list of users who can add these states and transitions.

Step 3: Link Assessment with the controller

In the Assessment Builder Screen, Choose the Controller.

Close

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☒ Shareable with Patient

☐ Enable client side validation (recommended)

☒ Enable modern printing

Summary Display

1

In which views should this assessment be available?

☒ Patient

☐ Admission

☐ Location

☐ Provider

Workflow Support

Workflow Controller

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Templates Used In This Assessment

None