CENTRL

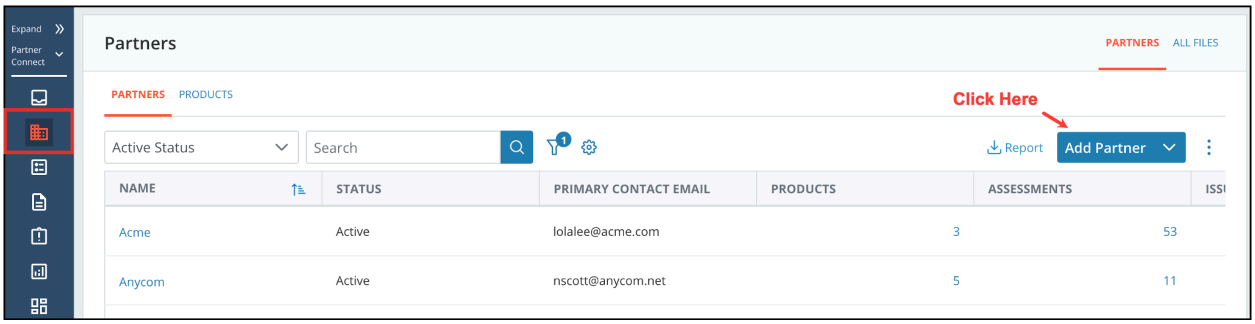
Quick Start Guide: Managing Partners and Assessments

The Centrl Platform helps customers publish assessments to assess risk across their partners and within their internal organization. The Partner Module helps customers track their Partners and the various issues and assessments related to them.

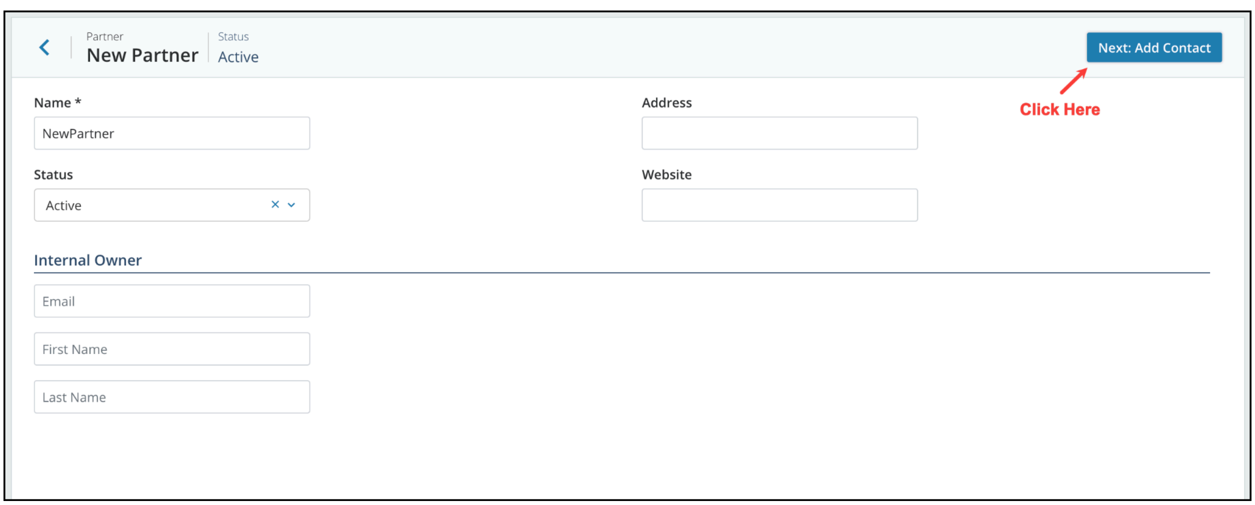
Partner Setup

Adding a Partner

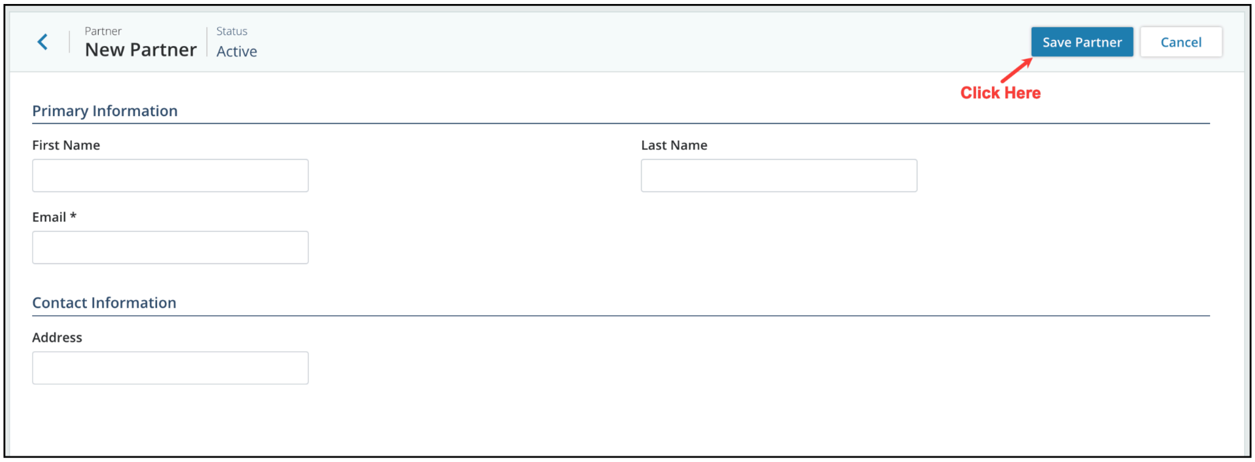
Users with the appropriate permissions canview and manage their Partner Data within the **Partner Module**. To add a Partner from the **Partner Module**, click the **Add Partner** button.



In the **Partner Details** screen, users enter Partner details such as Name, Status, Address, Website, and any custom attributes. Users can also assign an Internal Owner to the Partner. After adding the details, click the **Next: Add Contact** button to enter details for your Partner contact.

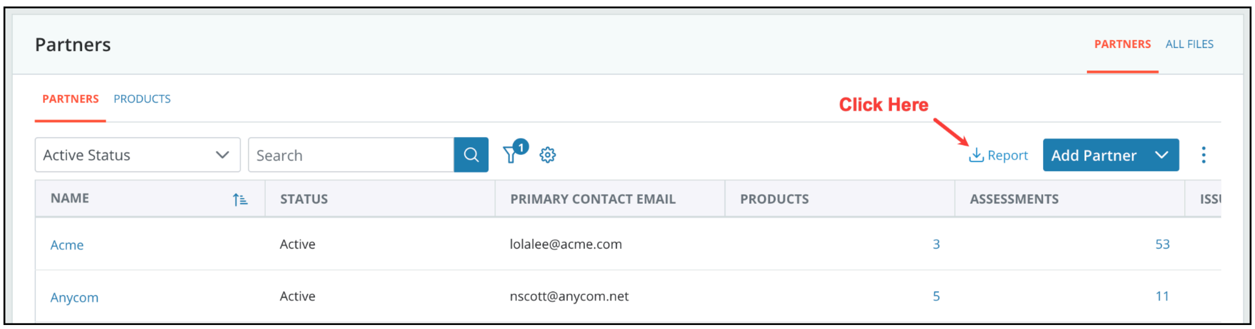


When finished adding a contact, click **Save Partner** to create the Partner record.



Exporting Partner Details

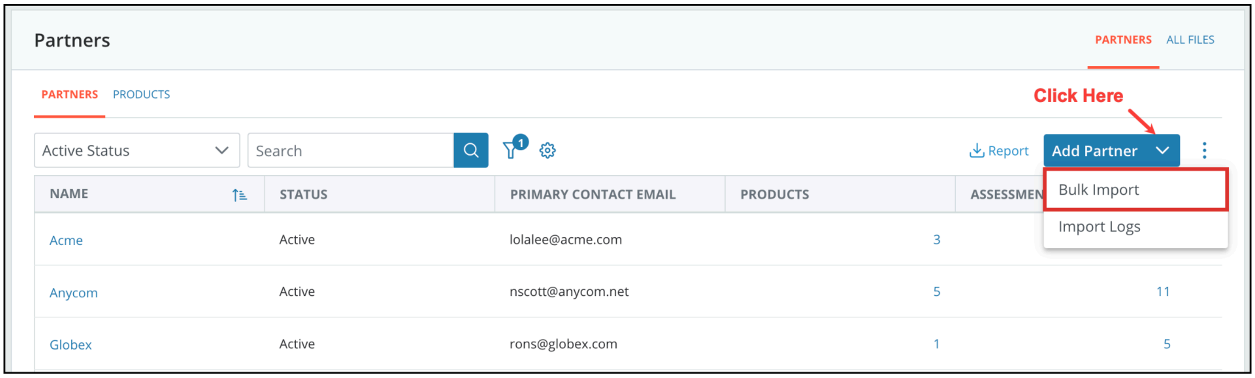
System administrators can export Partner details for reporting or data management. To export records, navigate to the **Partner** screen and click the **Download Report** link, as shown below. Users can import this file to add new records or adjust fields.



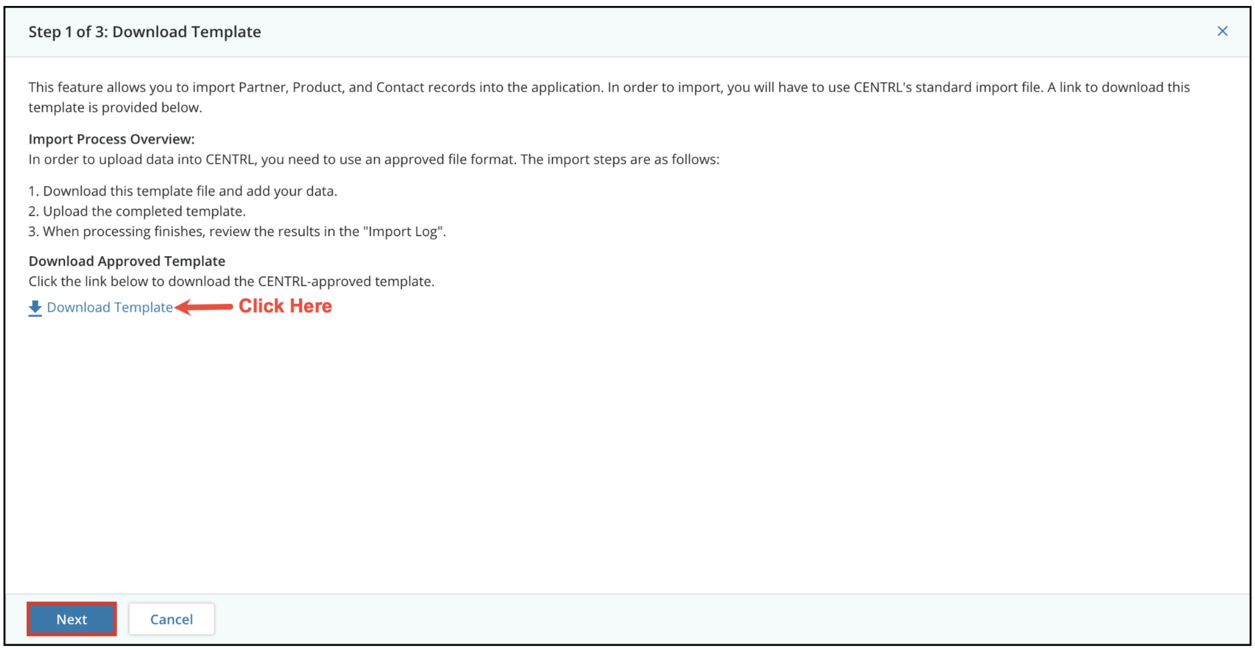
This action will send an email with a download link to an Excel file containing your complete Partner details.

Importing Partner Details

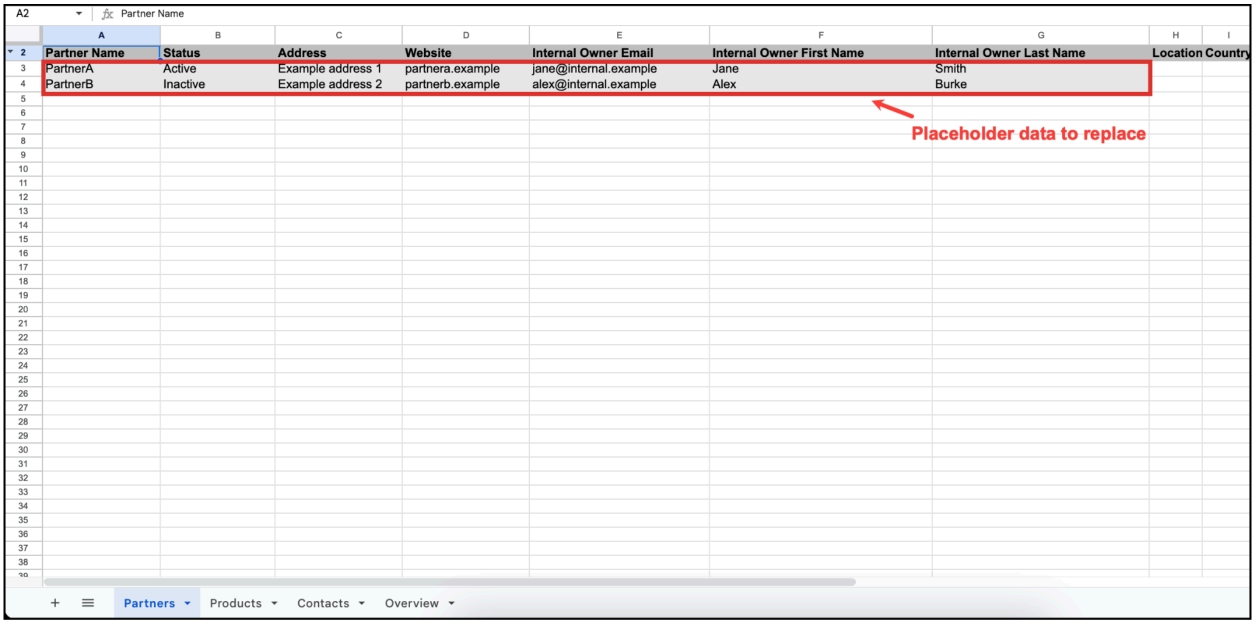
Users with the "*Add/Edit Partner*" permission can bulk import partners from an approved Excel or CSV file. This feature lets users easily update Partners details, such as their attributes, products, or contacts. To begin this process, navigate to your Partners table, as shown below, and click on the **dropdown** icon at the top right. From the dropdown, select **Bulk Import.**



You can download the import template as shown below. Within the template, you can add multiple Partners and their data, products, and contacts. Click on **Next** to upload the template back onto CENTRL to complete the import.



When downloading the template from this link, it will provide a blank import template. Do not alter the template columns or tabs as this will result in a format template error during import.



Please Note: The Bulk Import template has several tabs for updating Partner data, including Partners, Contacts, and Products. These tabs include reference data to show users how to format data for upload. Users should remove this data before import to avoid unintentional updates.

Do not alter the template columns or tabs to avoid formatting template errors.

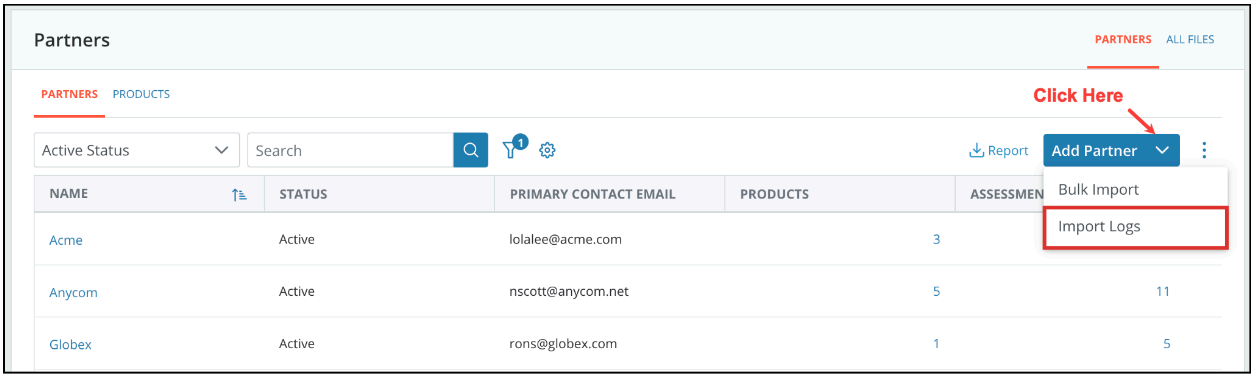
For a comprehensive guide on bulk importingPartner Data, please visit our articles here:

- Bulk Importing Partner from System Admin Module
- Bulk Importing Partners from Partners Module

Import Logs

Viewing Import logs for Partner Details can help users track the import progress, view errors, and make the necessary corrections to upload the file successfully.

To access your import logs from the **Partner Module**, navigate to the Partners screen, click on the **dropdown arrow** next to the **Add Partner** button, and select the **Import Logs** option as shown below.

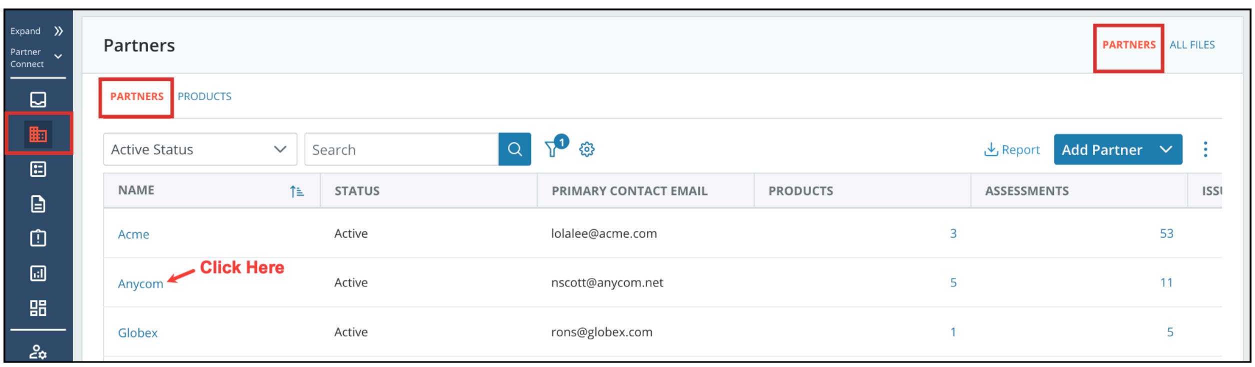


For an in-depth guide on how usingImport Logs, please refer to our Help Center article here: [Import Logs from the Partners Module](#).

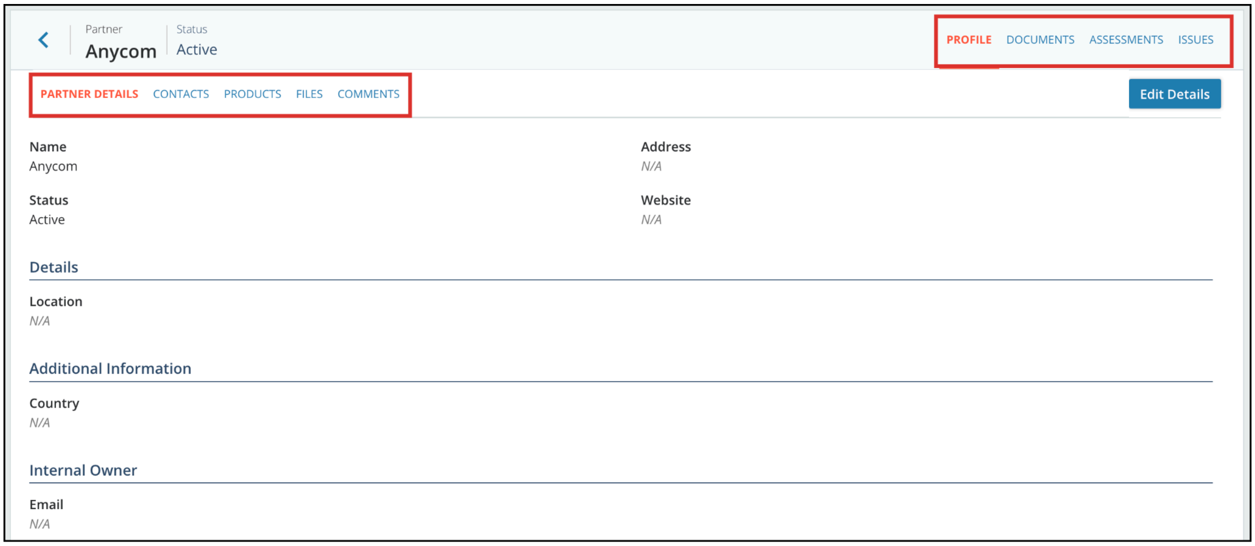
Viewing Partner Profile

Users with the appropriate permissions can view their Partner details within the Partner Profile Page.

1. Navigate to the **Partner Module** and click on a **Partner Name** from the Partners screen.

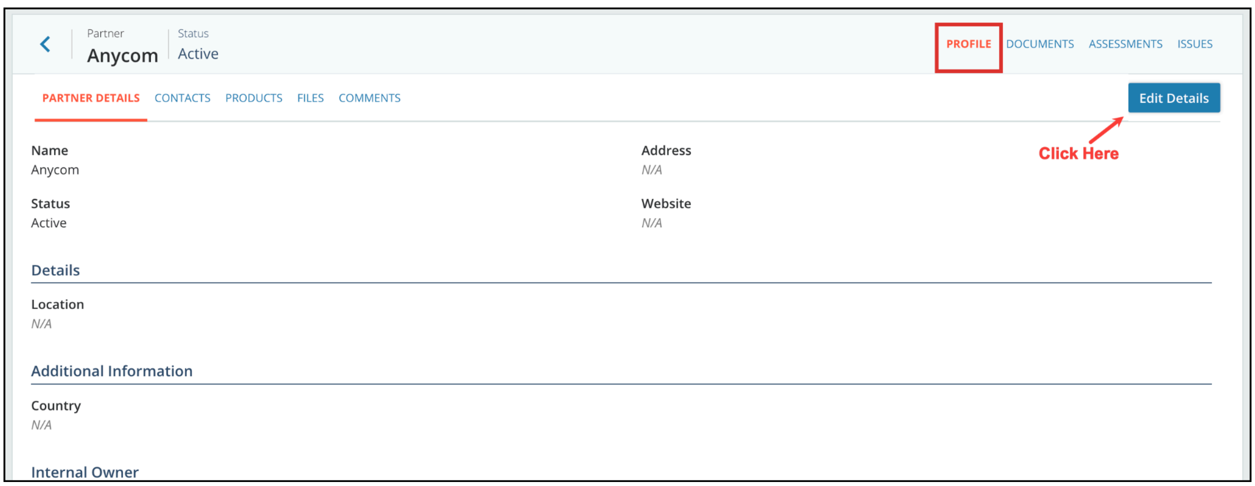


2. The Partner Details page provides an overview of the details for the selected Partner. You can select each tab below to navigate through the data about this Partner.



Editing Partner Details

1. Navigate to the **Profile** screen and click on the **Partner Details** tab.
2. Click on the **Edit Details** button to edit.



For more information on editing your Partner's details, please visit our Help Center articles here:

- Editing Partner Details from the Partner Module
- Editing Partner Details from the System Admin Module

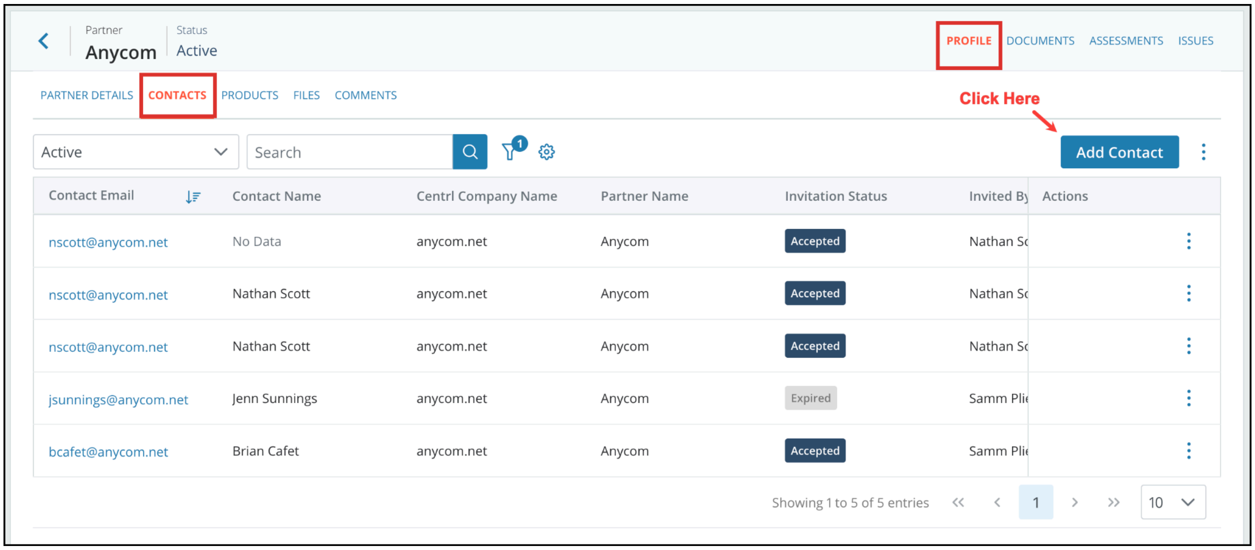
Custom Attributes

System administrators can add or remove attributes for their partners to capture additional information.

For more information on creating and adding custom attributes for your Partners, please visit our Help Center article here: Adding Custom Fields.

Adding Partner Contacts

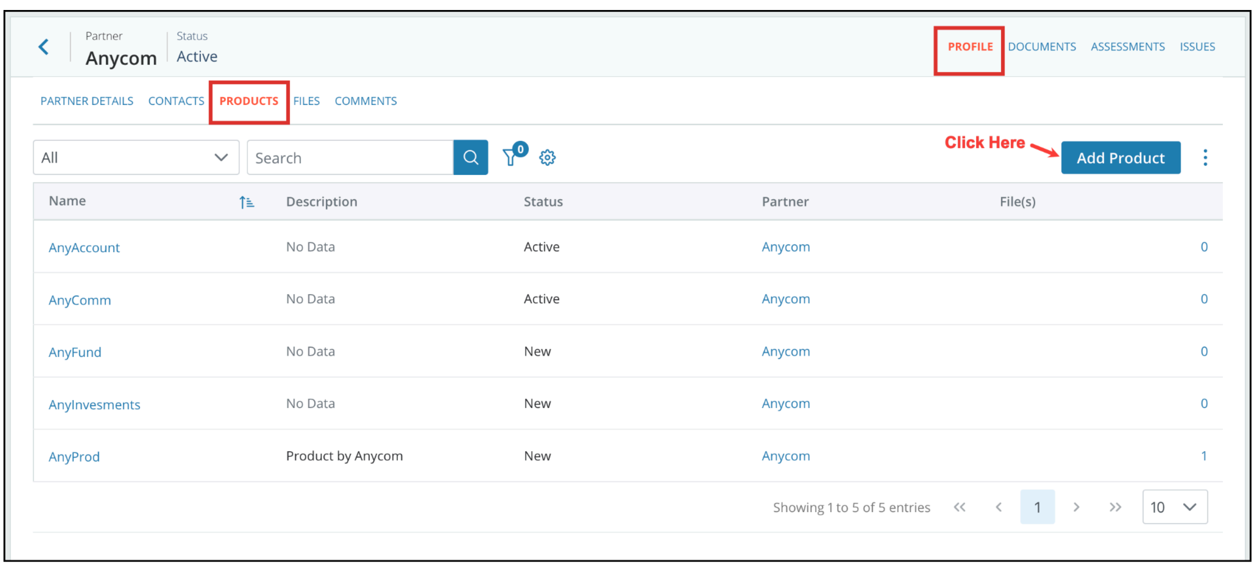
1. Within the **Profile** screen of the Partner profile, click on the **Contacts** tab. Here, you can view the contacts associated with the selected partner.
2. Click on the **Add Contact** button to add a new contact.



For more information on adding contacts to your Partners, please visit our Help Center article here: [Managing External Contacts from the Partners Module](#).

Adding Partner Products

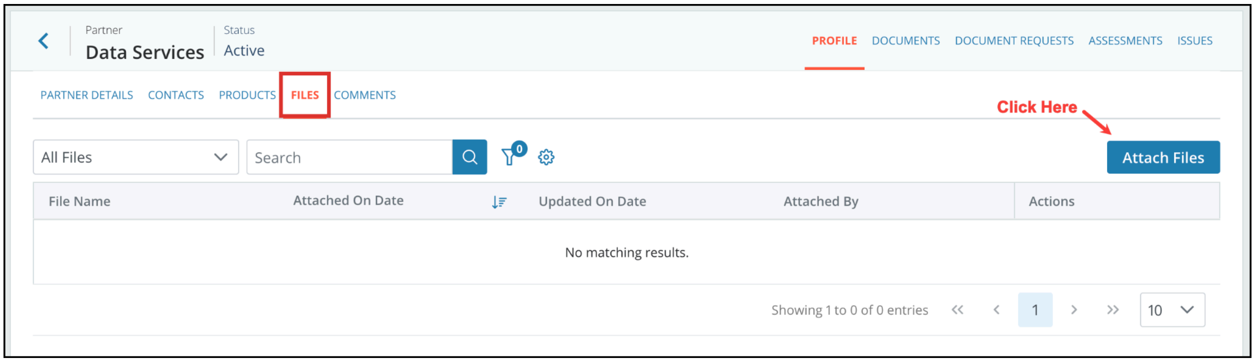
1. Within the **Profile** screen of the Partner profile, click on the **Products** tab. Here you can view the list of products associated with the selected Partner.
2. Click on the **Add Product** button to add a new Product.



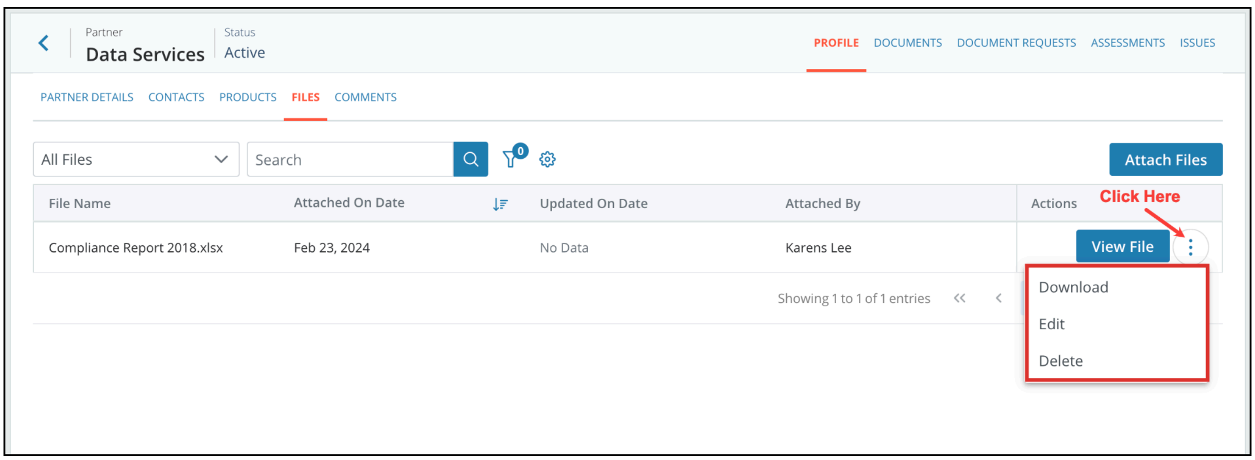
For more information on managing your Partner's Products, please visit our Help Center guide here: [Adding and Editing Partner Products from the Partners Module](#).

Attaching Files to a Partner's Profile

You can attach files and documentation related to a specific Partner. To do so, navigate to the Partner profile, click the **Files** tab, and then **Attach Files**.



ou can download, edit, or delete files by clicking the **three dots** option.



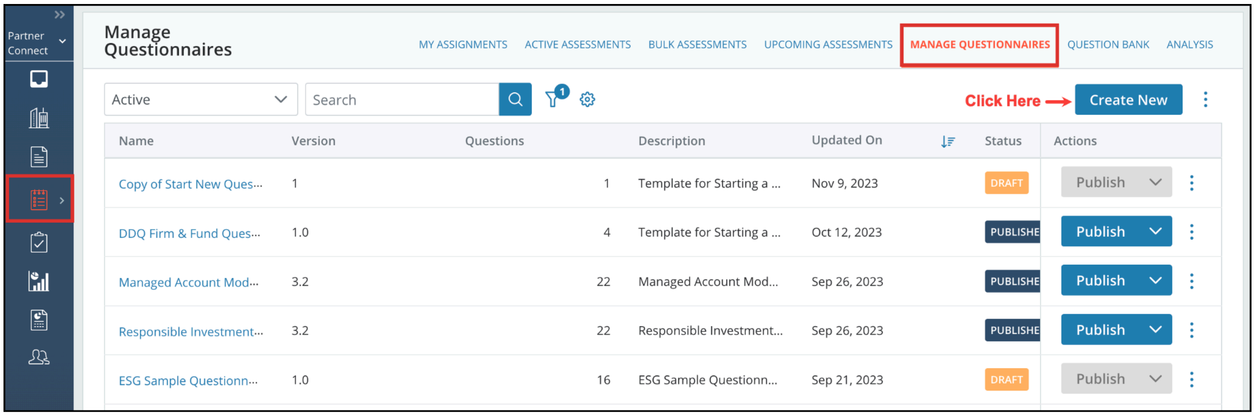
Assessments Module

Navigating to Manage Questionnaires

Within the **Manage Questionnaires** screen, users can create, manage, and publish questionnaires to their Partners.

1. Navigate to the **Assessments** module and click on the **Manage Questionnaires** screen.

2. Click on the **Create New** button to create a new questionnaire.



Creating a Questionnaire

You can create and publish questionnaires to your partner in the Assessments module. There are five ways to make a Questionnaire:

A.) **Using Industry Standard Templates:** You can create questionnaires using pre-digitized industry standard templates provided by CENTRL.

B.) **Create using an existing questionnaire:** You can create a new questionnaire by using an existing questionnaire your organization has made as a starting point. You can then edit the questionnaire to suit your needs.

C.) **Start new:** You can create a blank questionnaire using the template 'Start New Questionnaire' from the list of pre-digitized templates.

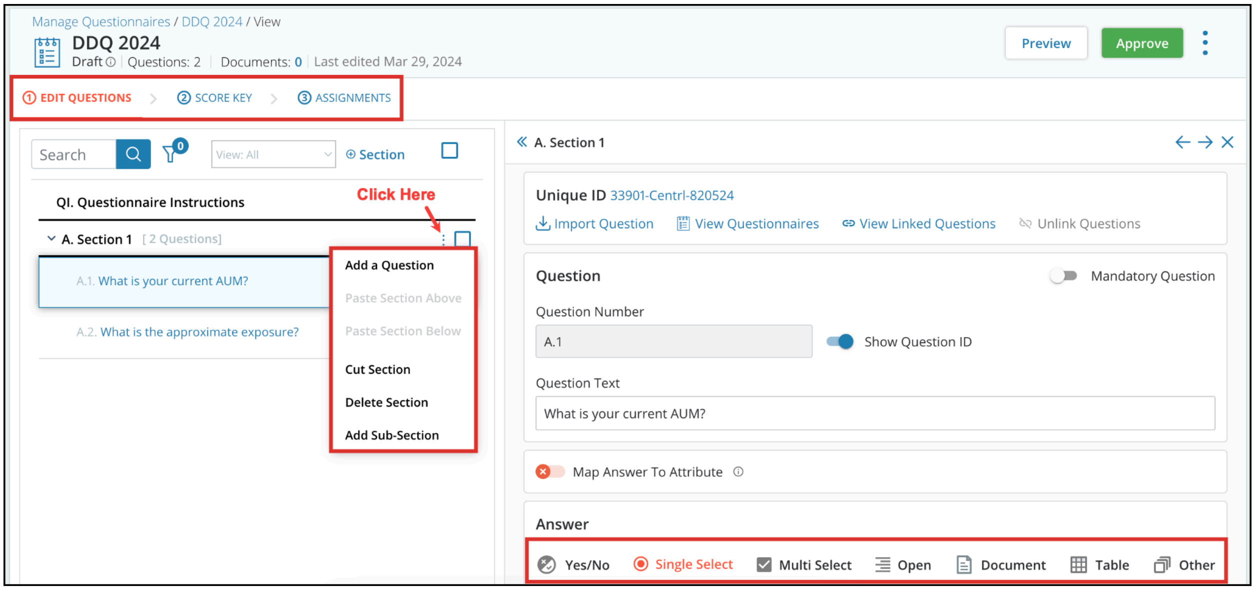
D.) **Import using the CENTRL Excel template**:You can create a new questionnaire by importing CENTRL's approved Excel questionnaire template. Users can view the import logs to track import progress, view errors, and make the necessary corrections to upload the file successfully. Visit our Help Center article on Importing Questionnaires: [Importing a Questionnaire].

E.) **Create using the Question Bank**: The Question Bank lets users create a questionnaire by selecting previously used questions across each assessment. For more information, visit our Help Center article: [Question Bank section].

For more in-depth details on the various ways to create questionnaires, view our Help Center article: [Creating A Questionnaire].

Editing a Questionnaire

After creating a questionnaire, you can customize it to suit your needs before publishing. You can add or edit questions, sections, sub-sections, and follow-up questions and change the questionnaire's format and properties.

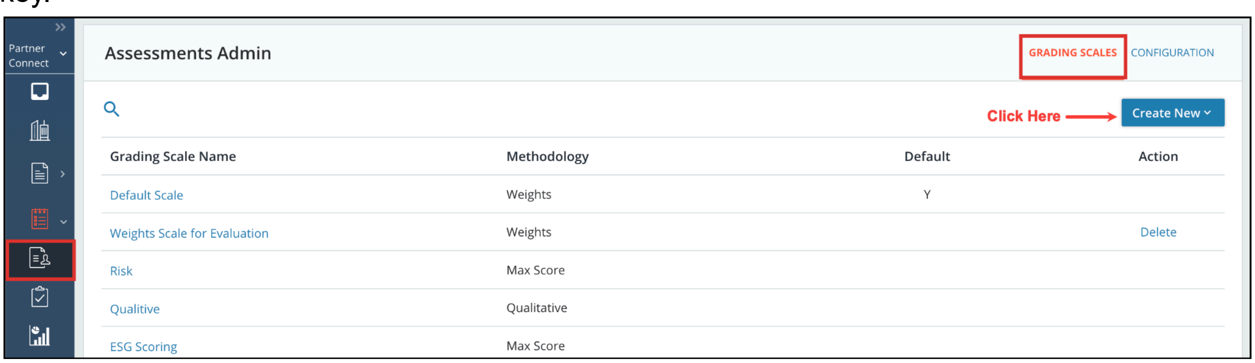


Note: Users can modify questionnaires in the Draft status. Questionnaires become locked once Approved.

Please visit our Help Center article here to learn more about how to edit your Questionnaires: [Editing a Questionnaire](#).

Score Key

The Score Key tab allows users to modify the necessary scoring configurations to score questionnaires. To create a score key, go to the **Assessments Admin Module** and access the **Grading Scales** screen. Click on the **Create New** button, as shown below, to create a score key.



These are the three scoring methodologies available for use:

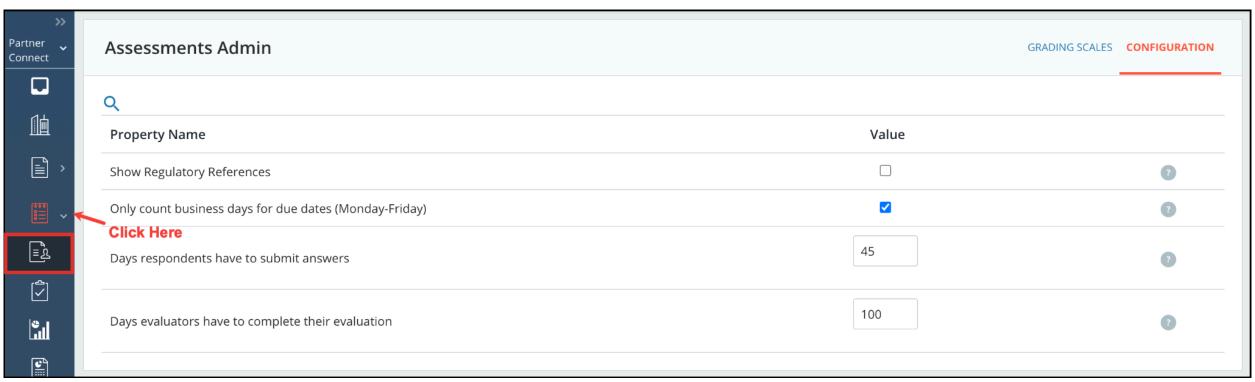
- **Weights** - allows users to define a "weight" for each question or section in the questionnaire. Our system will calculate the final grade as the weighted average of all question grades.
- **Max Scoring** - allows users to define a maximum score for each question in the questionnaire. The system will calculate the final grade as the percent of the maximum score.
- **Qualitative** - used to evaluate questionnaires when numeric scores are not applicable.

For a complete guide on creating, customizing, and utilizing your Score Key, please visit our Help Center article here: Grading and Scoring Methodology.

You can navigate to the Assessments Admin Module to configure your score keys.

Assessments Admin Module

Users with the proper permissions can access the **Assessments Admin Module** and configure questionnaire settings. They can also enable regulatory references within this module, set due dates to count only business days and more. To access this module**,** click on the **> dropdown** icon next to the **Assessments Module**, then click on the **Assessments Admin Module** icon, as shown below.

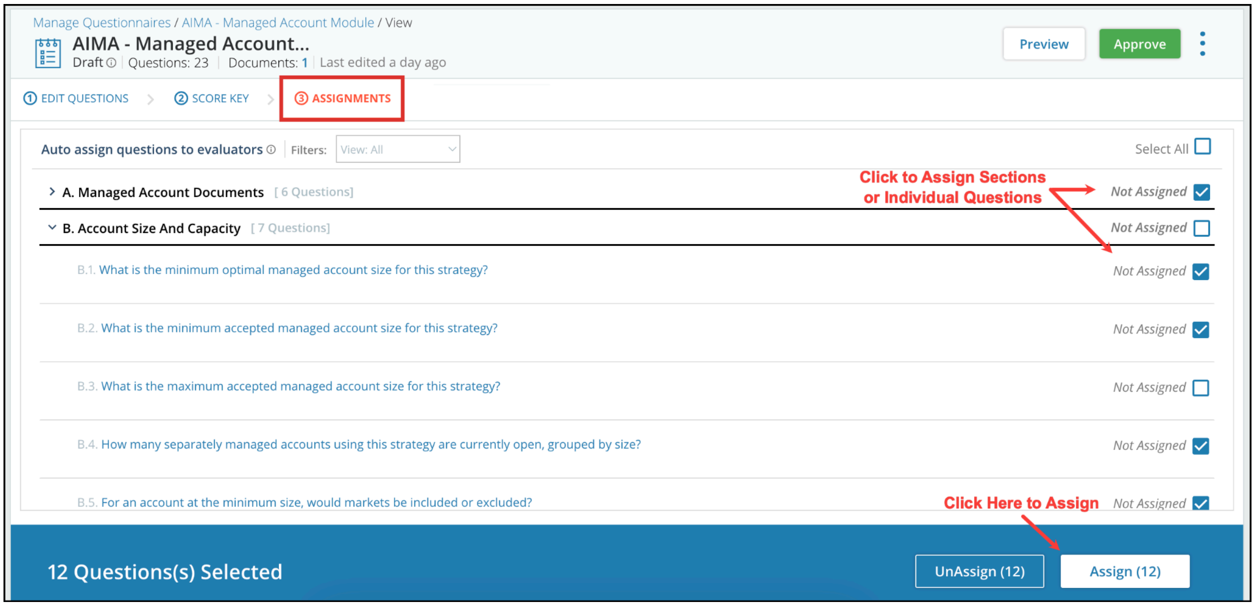


For a complete guide on the configurable settings within this module, please visit our Help Center article here: Configure Questionnaire Settings.

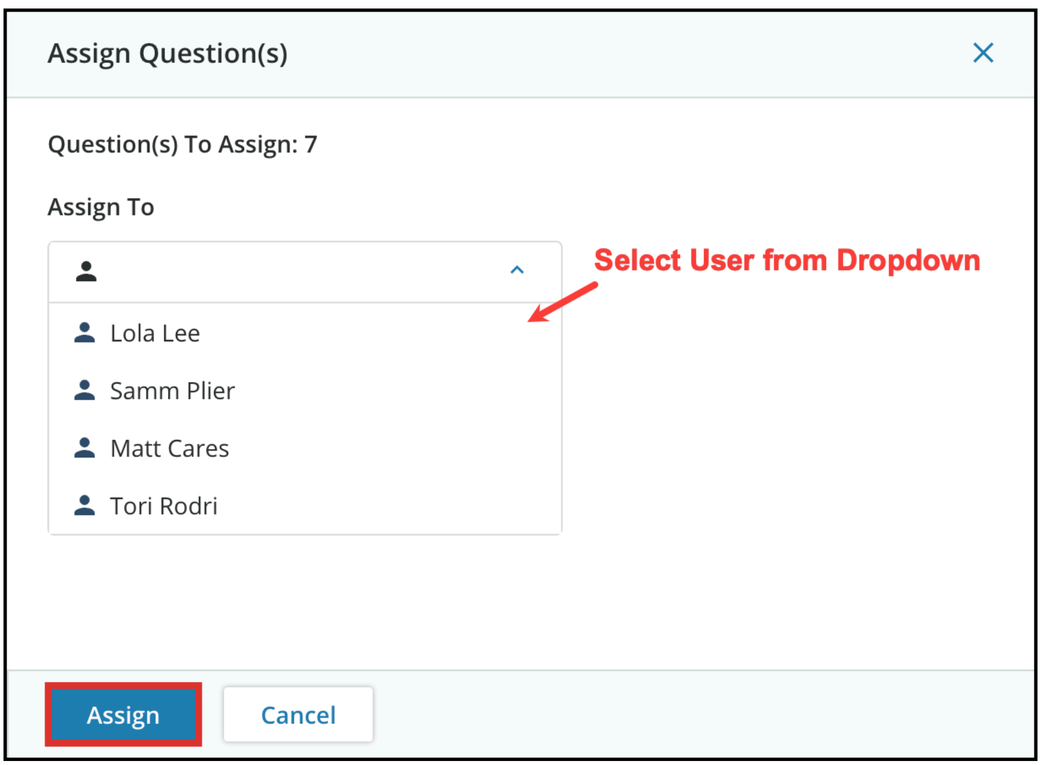
Assignments

The **Assignments** tab lets users set up rules to automatically assign a question or section to a user or group for evaluation.

Users can click the **checkboxes** for the questions/sections they wish to assign and click on the **Assign** button, as shown below.



In the *Assign Question(s) window,* you can select an internal user from the dropdown list. Click on **Assign** to confirm your selection.

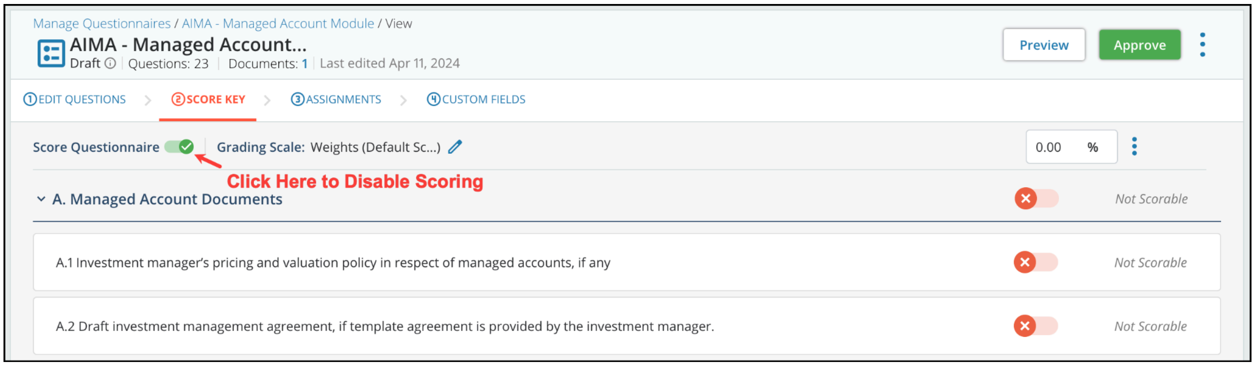


For more information on the *Assignments Tab,* please visit our article here: [Auto-assigning Questions and Sections](#).

Enabling Scoring for Questions

Scoreable and Non-scorable Questions

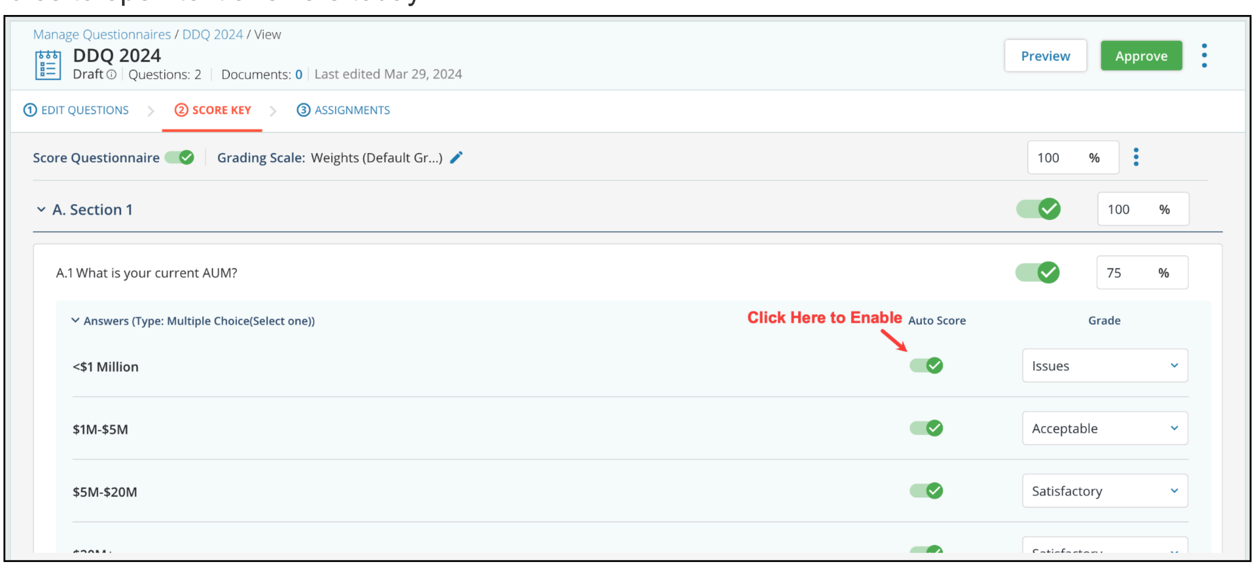
Users will also have the option to toggle particular questions or sections as scorable or non-scorable. Click the Toggle icon below to enable or disable scoring for an entire questionnaire.



For more information on non-scorable questions/sections, please refer to our Help Center article: [Setting a Questionnaire as Non-Scorable](#).

Enabling Auto-Scoring

The Auto-Evaluation feature lets users save time by creating rules to automatically score particular answers. Depending on the Scoring methodology used for the questionnaire, only particular answer types can enable Auto-Evaluation. For example, users cannot add scoring rules to open text answers today.

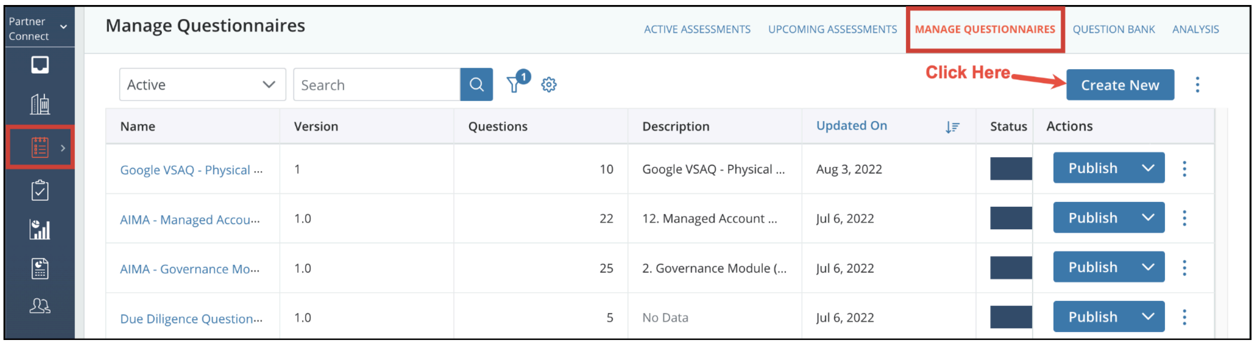


Please note: Auto-Evaluation is not enabled by default.

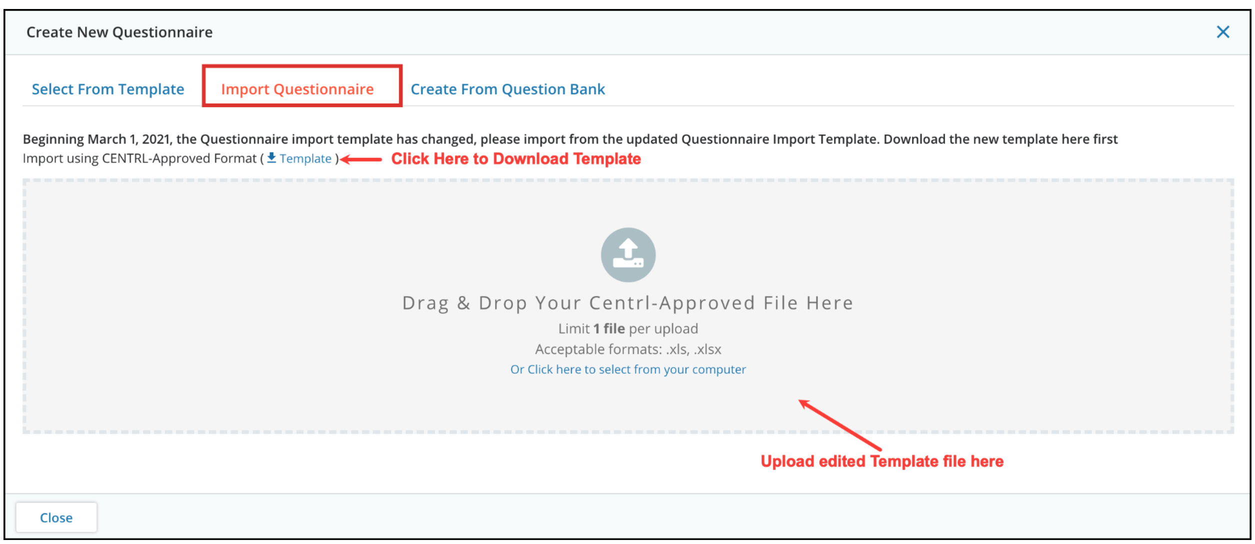
Visit our Help Center article for Auto Evaluation: [Enable Auto-Evaluation for Questionnaires](#).

Importing a Questionnaire

Users can create new Questionnaires by updating and importing the CENTRL approved questionnaire template. To download the template, navigate to the **Assessments Module** > **Manage Questionnaires** Screen > and click on the **Create New** button, as shown below.



Then, in the *Create New Questionnaire window,* select the **Import Questionnaire** tab, and then click on the **Download Template** link to download the template, as shown below.



After editing offline, you can upload the file in the same window to complete the import. For more information on the Import Questionnaire process, please visit our article here: [Importing a Questionnaire](#).

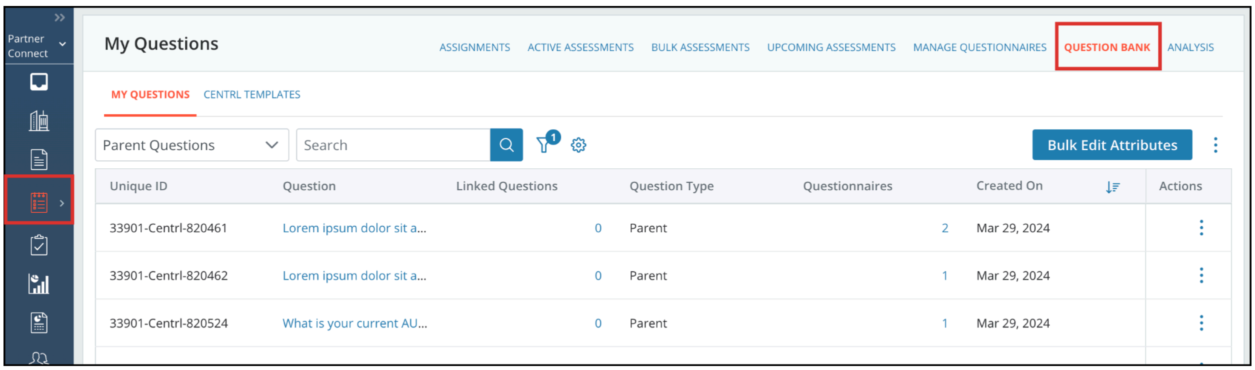
Question Bank

The Question Bank feature lets users manage all questions in a single place and quickly define custom attributes for each question. Most importantly, users can link questions together to tell the system when to treat different questions as the same. Linkage improves the process of prepopulating answers by telling the system to choose between the latest answer to a linked question when prepopulating answers.

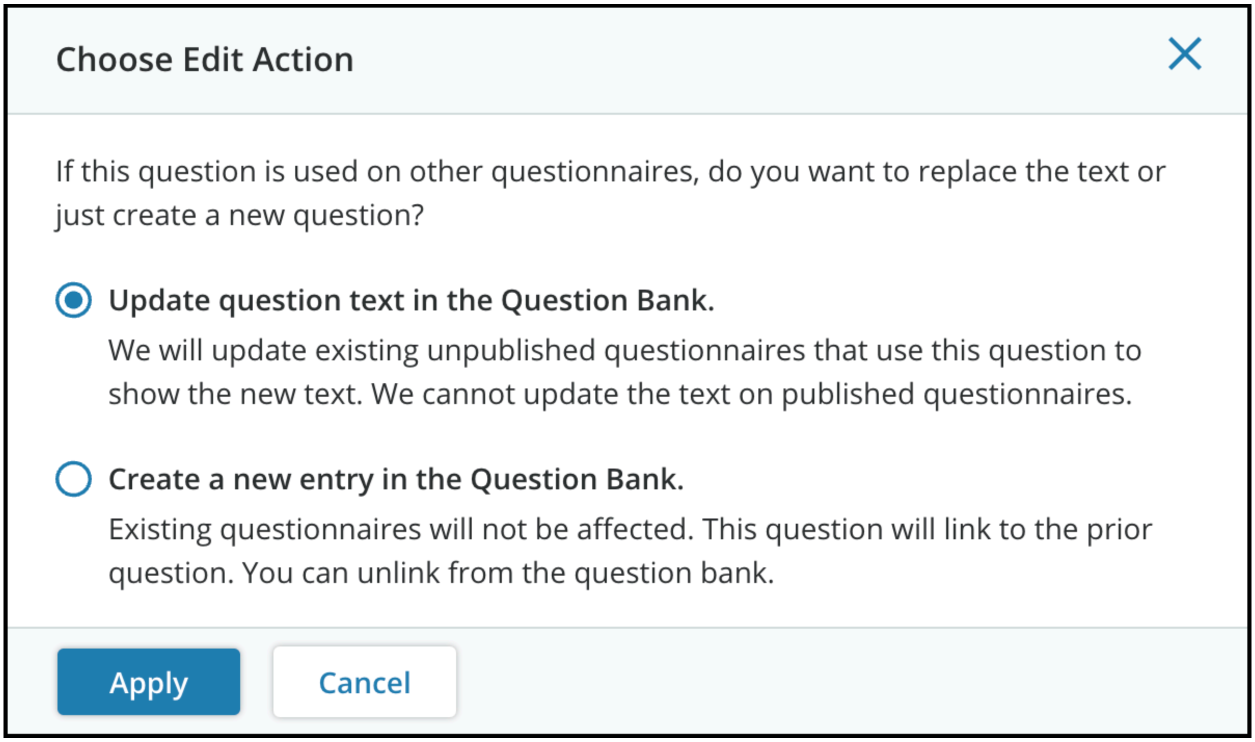
For example, let a customer have three linked questions:

1. Where are you headquartered?
2. Where is your headquarters located?
3. Where are you headquartered?

When prepopulating the answer to "Where is your headquarters located?" the system will look at the latest answer to these three questions.



Users can choose whether to create a linkage when updating an existing question. Users might not want to link the new question if they are entirely rewriting it as something else.

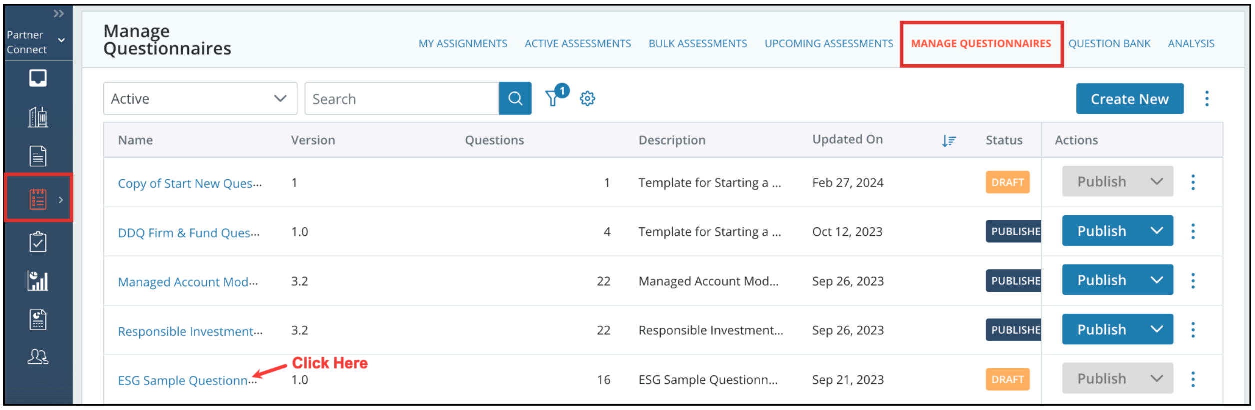


For more information on utilizing the Question Bank, please refer to our Help Center articles below:
[Viewing and Managing the Question Bank]
[Creating a Questionnaire from the Question Bank]
[Linking Questions for Pre-population]

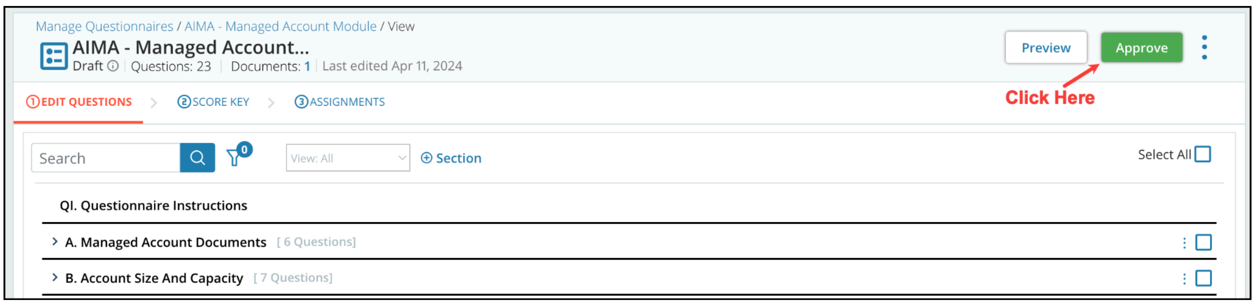
Approving a Questionnaire

In CENTRL's workflow, users can only publish approved questionnaires. Only users with the *Questionnaire Approve* permission enabled in their user profile or who are Questionnaire Admins can approve a questionnaire. Once approved, users cannot modify a questionnaire.

1. Navigate to the **Manage Questionnaires** screen and click on the name of any assessment in a *Draft* Status. The questionnaire will open the edit screen.



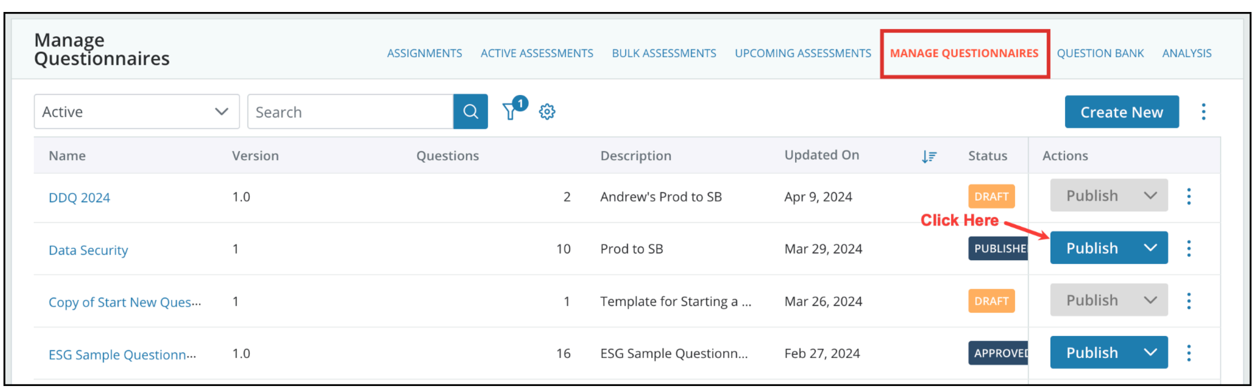
2. From the edit screen, click the **Approve** button.



For more information on approving a Questionnaire, please visit our Help Center article here: [Approving a Questionnaire](#).

Publishing a Questionnaire

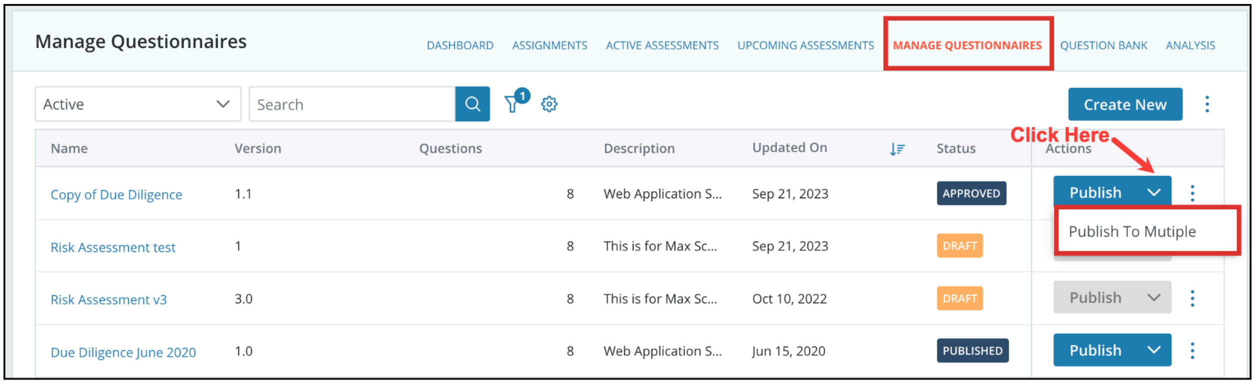
CENTRL allows you to publish approved or already published questionnaires. Furthermore, users can publish a questionnaire only if they have the *Publish* role permission enabled or if they are a Questionnaire Admin. To publish a questionnaire, navigate to the **Manage Questionnaires** screen and click the **Publish** button. Clicking this action will bring up the Start & Publish Assessment screen.



Please Note: Alternatively, you can also publish directly from the Questionnaire Edit screen.

Publishing to Multiple Partners

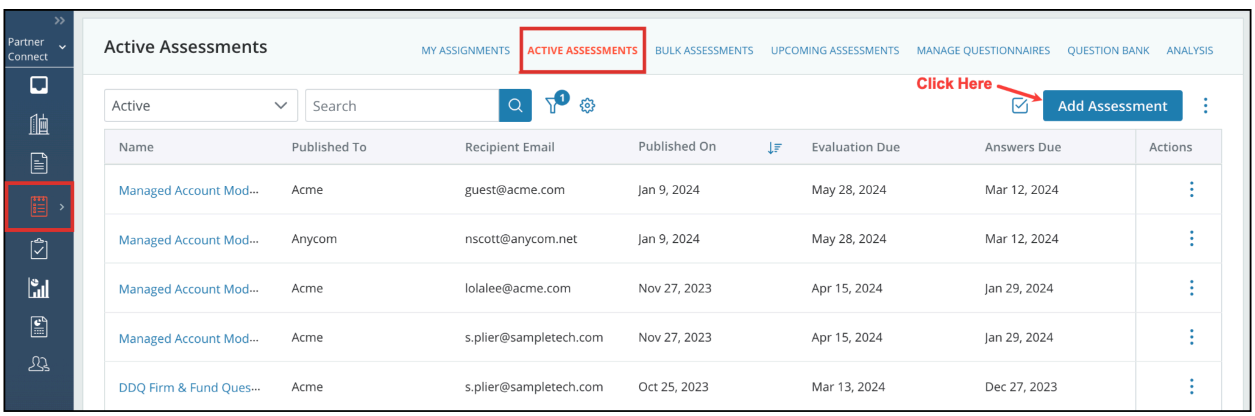
Users can use Bulk Publish to publish a questionnaire to multiple partners simultaneously.



To learn more about publishing to multiple partners, see the following article: [Publishing to Multiple Partners].

Publishing From Active Assessments Screen

A questionnaire can also be published directly from the Active Assessments table. To begin this process, navigate to the **Active Assessments** Screen and click the **Add Assessment** button, as shown below.



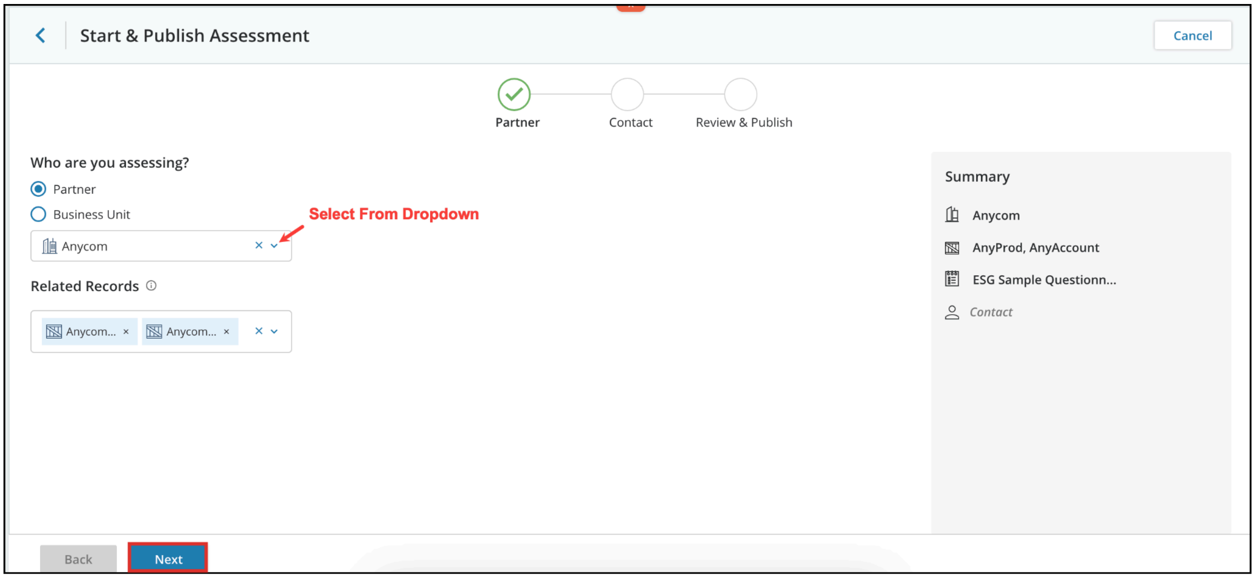
For more details about publishing an assessment, view our Help Center article: [Starting a new Active Assessment].

Publishing an Assessment

The publishing flow is a 3 stage process, as outlined below:

Step 1: Select Partner:

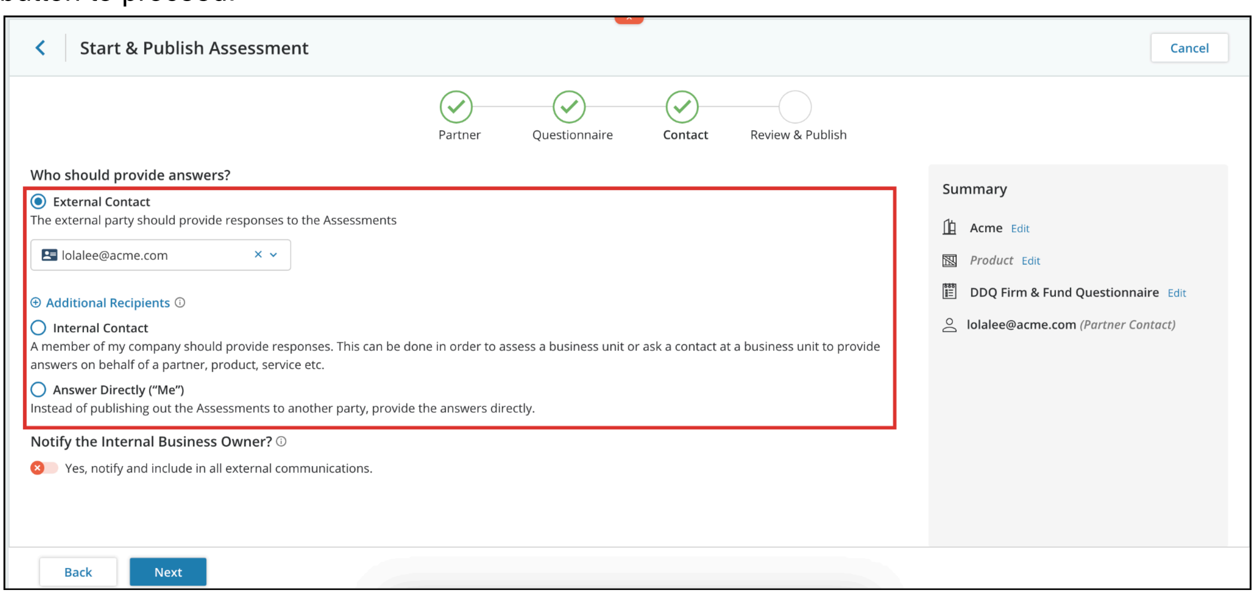
To start, select the Partner or Business Unit you wish to assess. Note that you cannot publish to Partners marked as Inactive. You can optionally select related records like products or relationships when publishing an assessment. Selecting related records indicates that this assessment covers not just this Partner but specifically its related records. Click on the Next button to proceed.



Please note: Users can add a new Partner on the fly by typing the partner's name in the dropdown field.

Step 2: Select Contact:

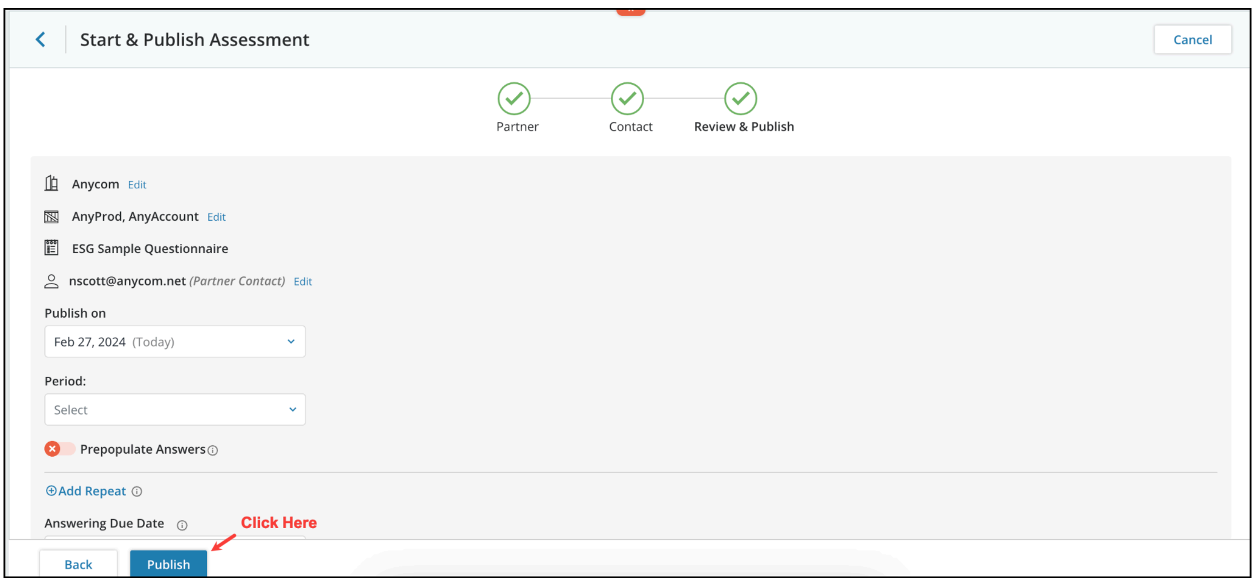
You can select which individuals will receive this assessment. Users can add one or many recipients by utilizing the Additional Recipients feature. Select a recipient(s) and click the **Next** button to proceed.



The following options are available:

- **External Contact:** Use this when publishing the questionnaire to your external partner contact(s). You can select an existing partner contact or add a new one.
- **Internal Contact** - When publishing the questionnaire to an internal business unit contact, select this option. To learn more about publishing to an Internal Business Unit Contact, view the article: Publishing to Internal Business Unit Contact.
- **Answer Directly ("Me")** - Select this option if you are answering the questionnaire on behalf of your Partner. To learn more on Self-publishing, view the article: Self-publishing Questionnaires - Answer on Behalf of a Partner.

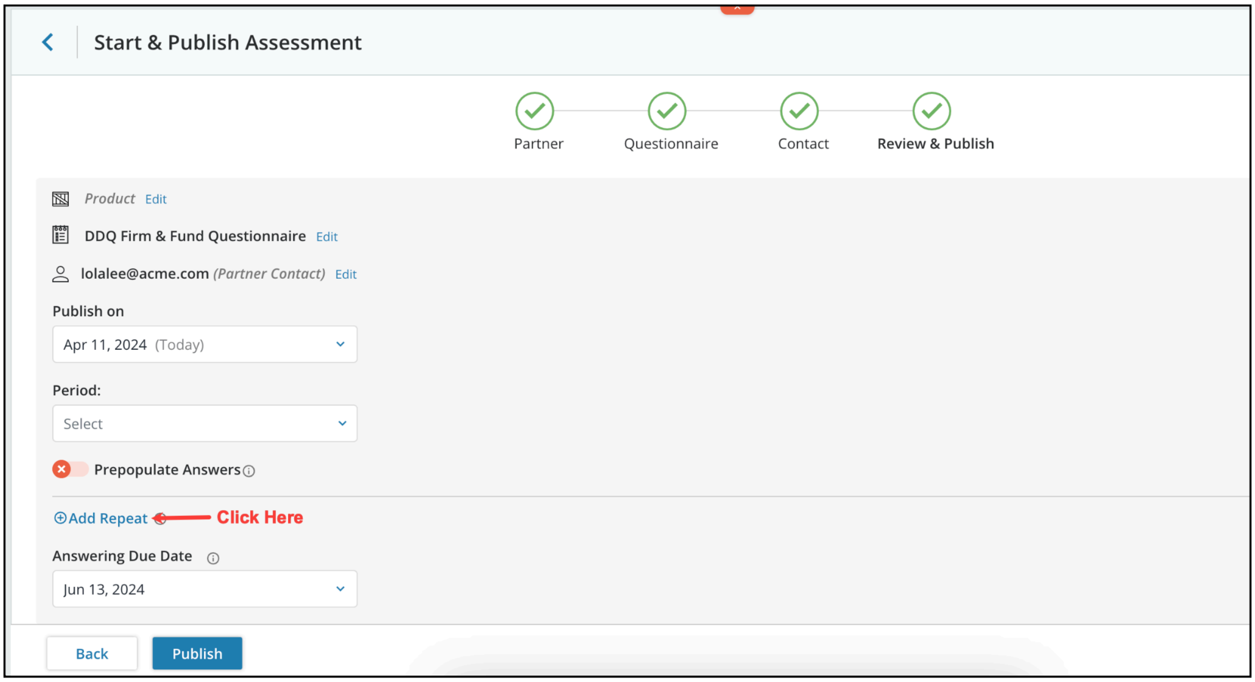
Step 3: Review and Publish:
The final stage is to review the assessment details, confirm the publish date, and configure additional details for this assessment. Once the questionnaire is published, users can view the Assessment in the Active Assessments table.



Please note: The recipient(s) will receive an email notification when you publish an assessment.

Adding a Repeat Occurrence

During the review stage of publishing an assessment, users can utilize the **Add Repeat** function to create a schedule of recurring assessments.

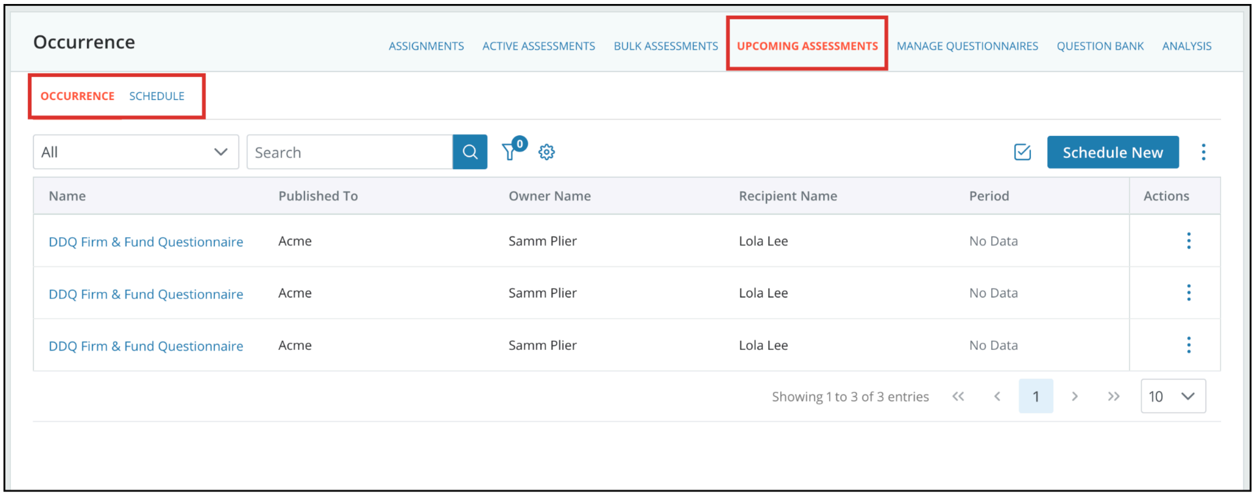


Users can customize the occurrence frequency, the next occurrence dates, and the end date for this recurring assessment.

For more information on adding occurrences, please refer to our Help Center article section: [Adding Recurrence]

Upcoming Assessments

Users can track future assessments in the **Upcoming Assessments** screen. Additionally, users can create a new schedule directly from this screen, as shown below:

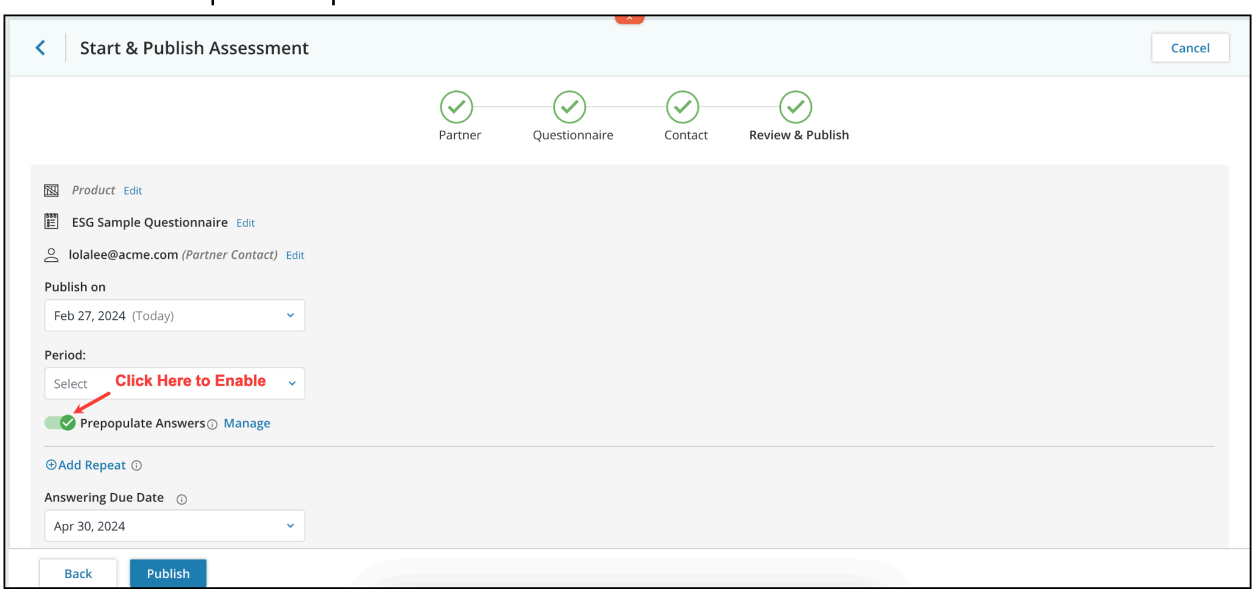


The **Schedule** tab displays the plans for any upcoming assessments, while the **Occurrence** tab displays the individual entities for each upcoming assessment scheduled from the plans.

For more information on upcoming assessments, please refer to our article: Scheduling an Upcoming Assessment.

Prepopulating Answers

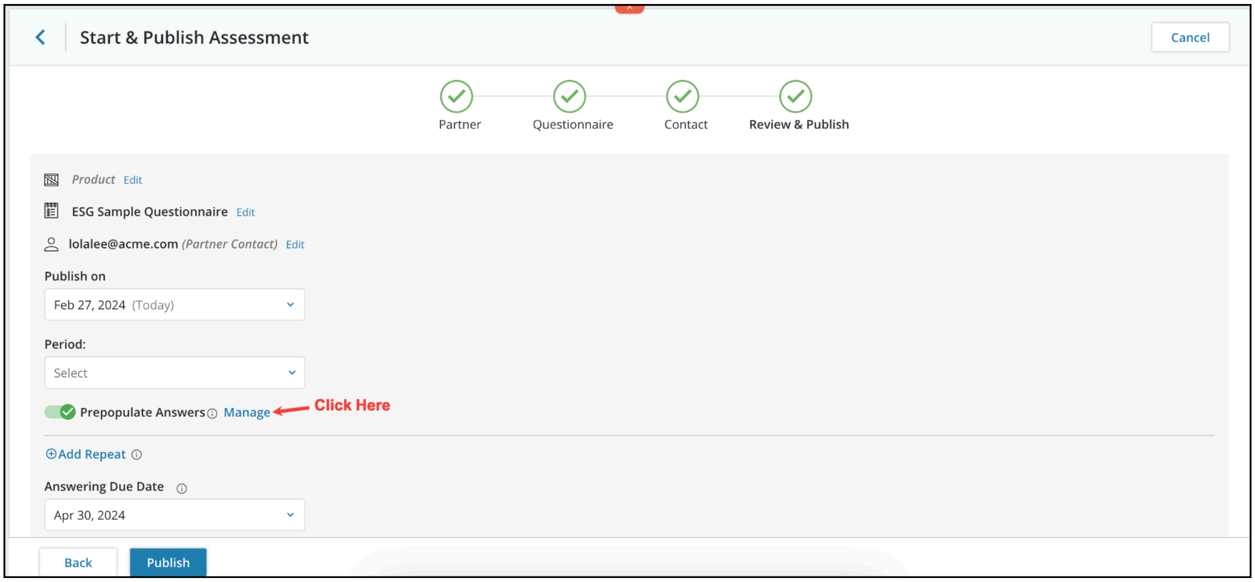
Users can prepopulate an assessment with answers a Partner has previously. Prepopulation helps a Partner quickly respond to an assessment by simply changing only the question answers that require an update.



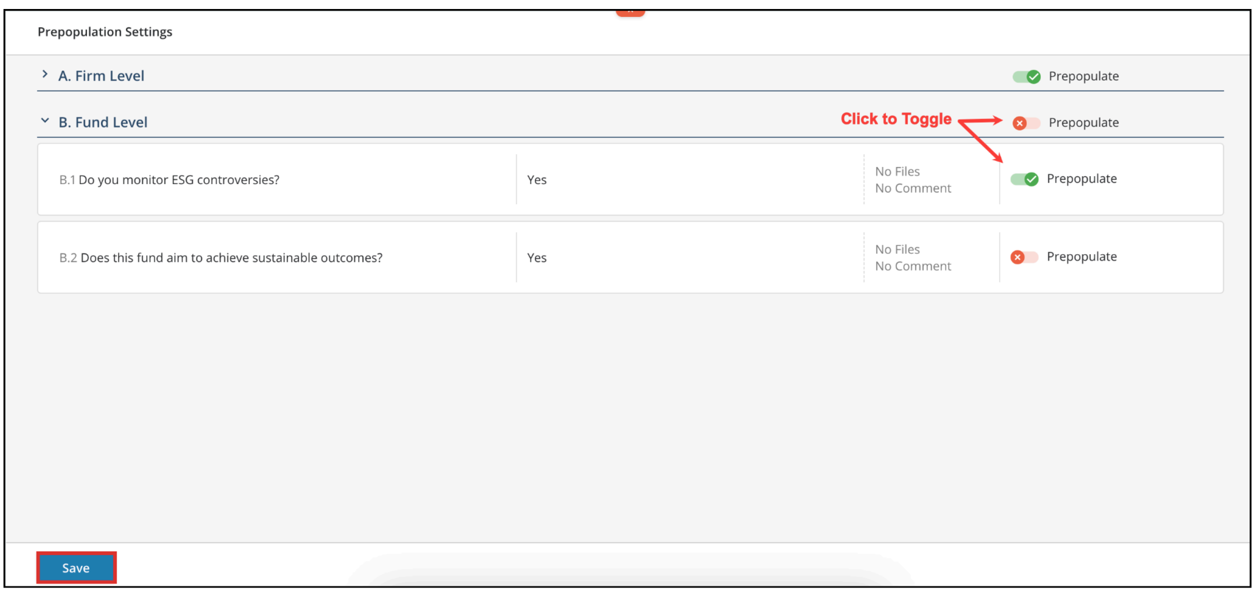
To learn more about the Pre-populate answer feature, please see the following article: Parameters for Pre-populating Assessments

Managing the Prepopulation Settings

1. From the Review & Publish screen, toggle the switch for Prepopulate Answers to enable pre-population, and click on the **Manage** button.



2. The Prepopulation Settings screen displays the prepopulated answers to the questions. From this screen, you can enable or disable the prepopulated answer for any questions, follow-up questions, or an entire section, as needed.

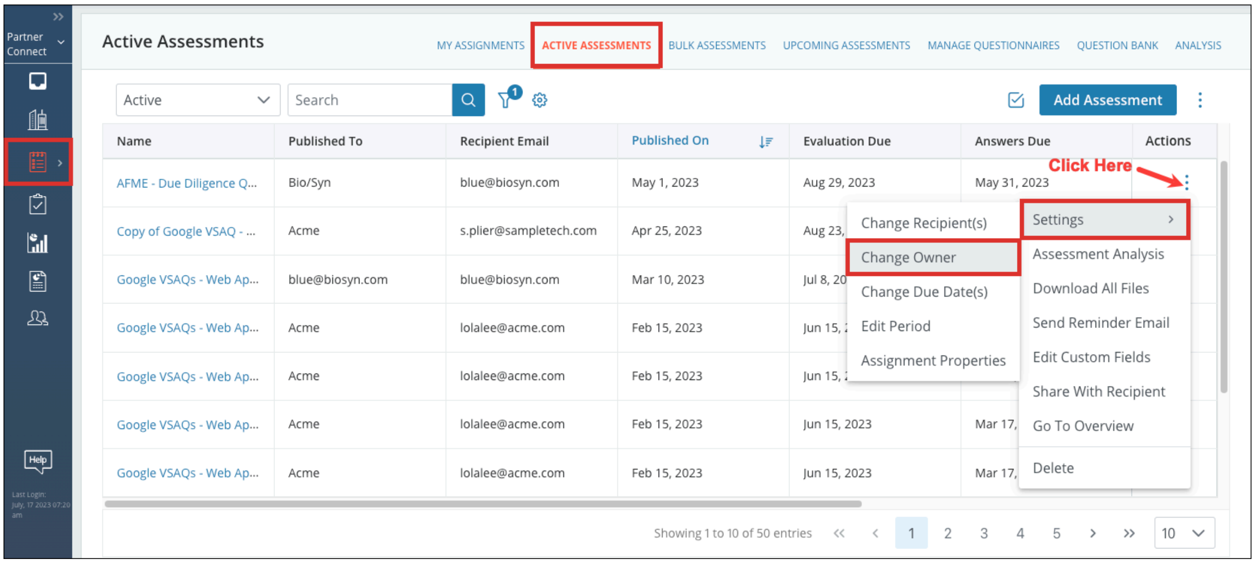


Please note: Enabling pre-population for answers saves time during evaluation by loading your last evaluation when answers remain unchanged.

For more information on Managing your Prepopulation settings, please refer to our Help Center article here: [Manage the Prepopulation Settings].

Change the Assessment Owner

1. From the **Active Assessments** tab in the **Assessments Module**, click on the **three dots** for the active assessment you wish to edit.
2. Click **Settings** and select **Change Owner**.

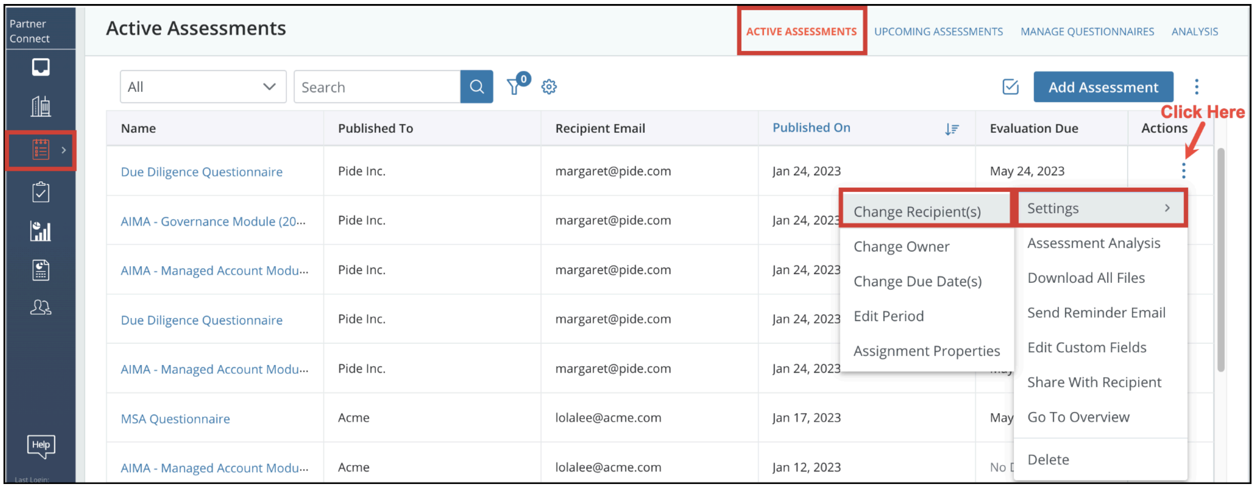


3. In the **Change Owner** screen, you can select the new owner from the dropdown menu.
4. Click on the **Change Owner** button to save your update.

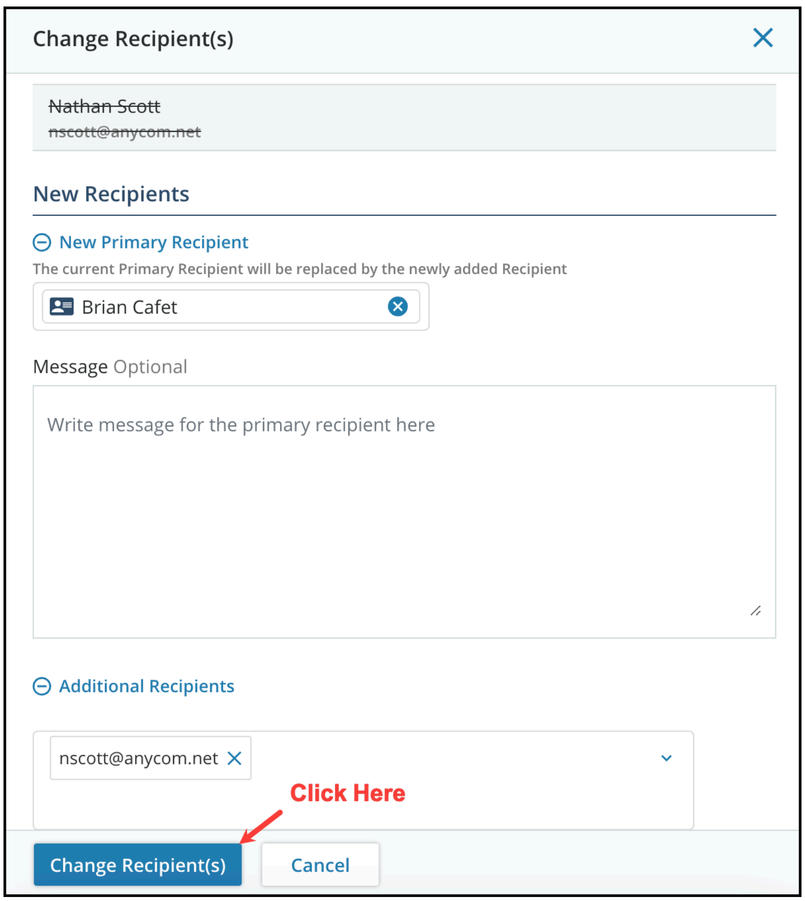
For more information on changing assessment owners, please visit our article here: [Changing the Assessment Owner].

Adding Additional Recipients

1. From the **Active Assessments** tab in the **Assessments Module**, click on the **three dots** for the active assessment you wish to edit.
2. Click **Settings** and then select **Change Recipient** to update the recipient(s).



3. You can manage the primary recipient and additional recipients within this modal. You can also add a new recipient by entering their email address. Click on the **Change Recipient(s)** button to update your changes.



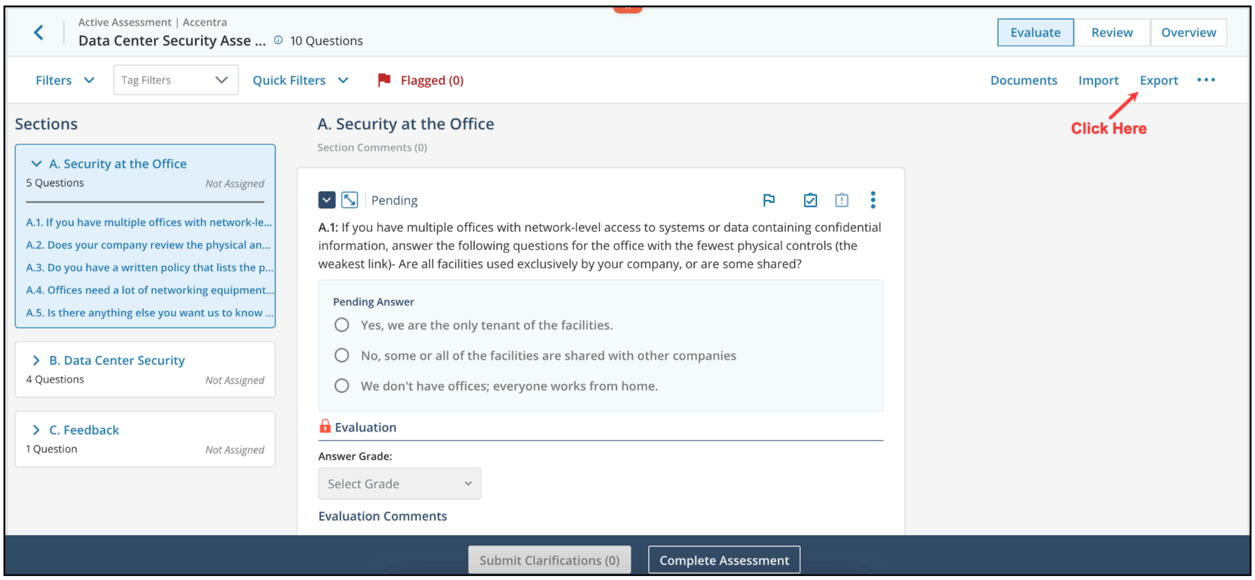
For a more in-depth guide on adding additional recipients, please visit our Help Center article here: [Adding Additional Recipients](#).

Export and Import an Assessment Answered Offline

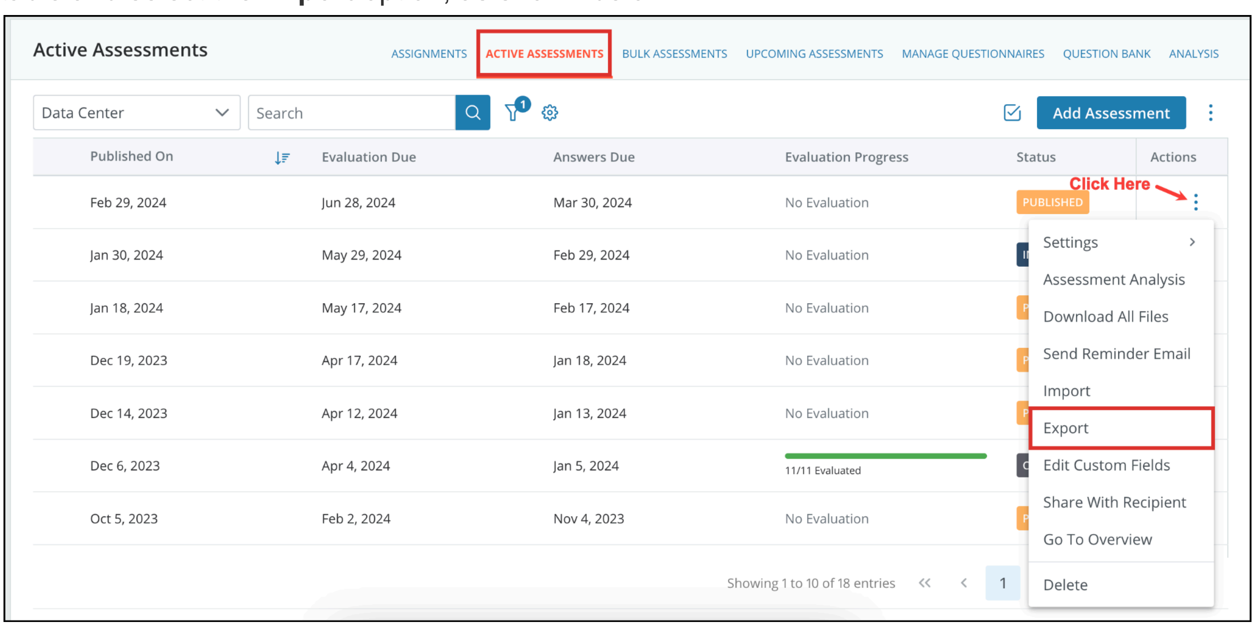
Export the file for offline answering

Questionnaire Admins and Assessment Owners can export an assessment offline answering file and then import the file with answers back into the platform. This feature is useful when the respondent prefers not to use the CENTRL platform to provide their responses.

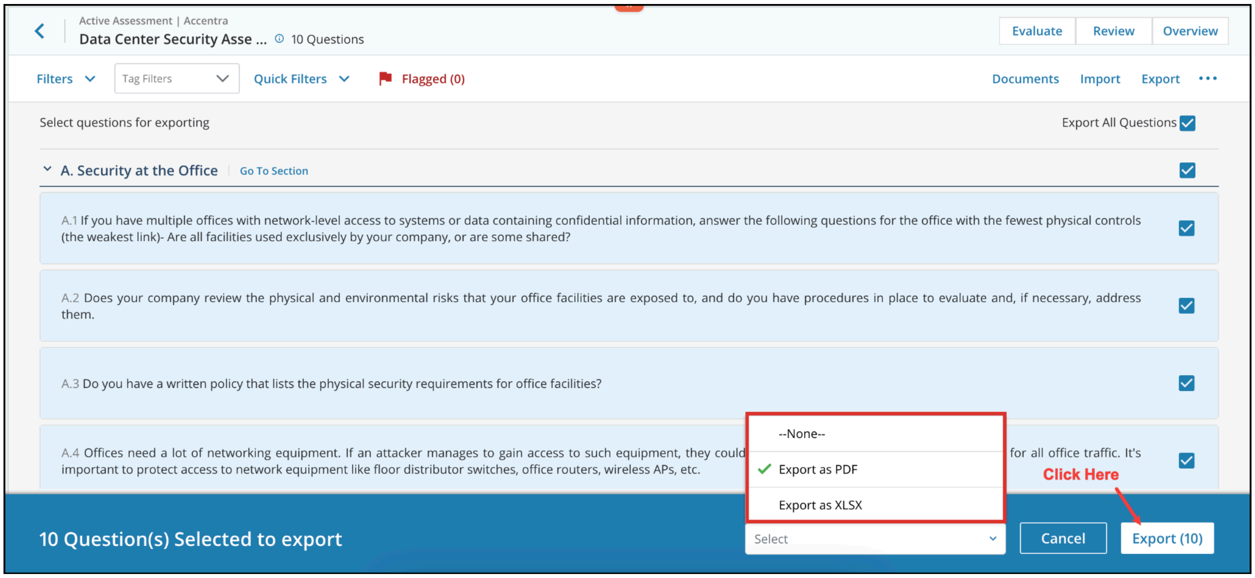
1. Within the **Evaluation** screen, click **Export** on the top right.



2. Alternatively, you can click on the **three dots** for the assessment on the Active Assessment table and select the **Export** option, as shown below.

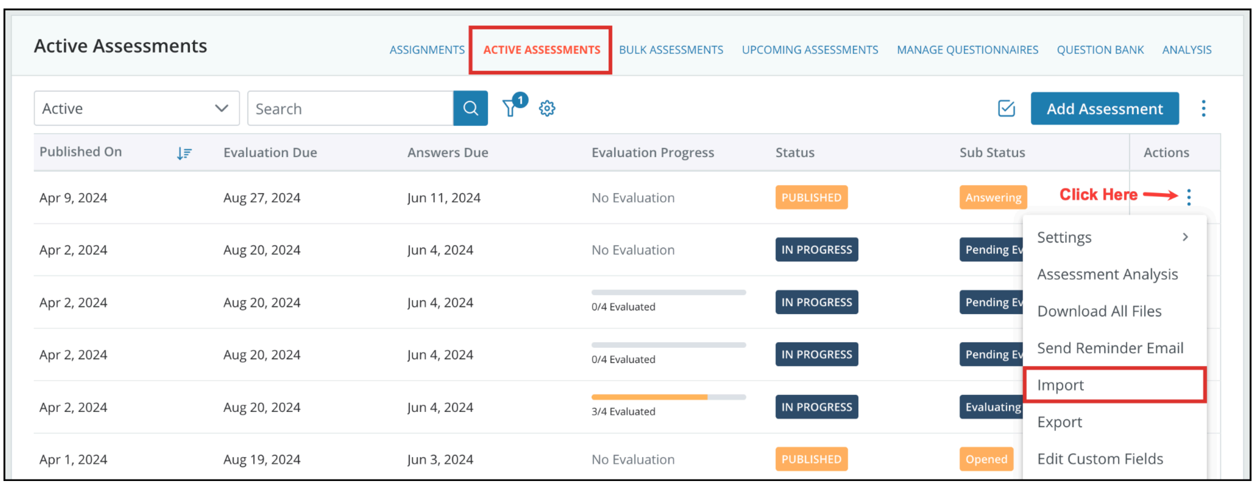


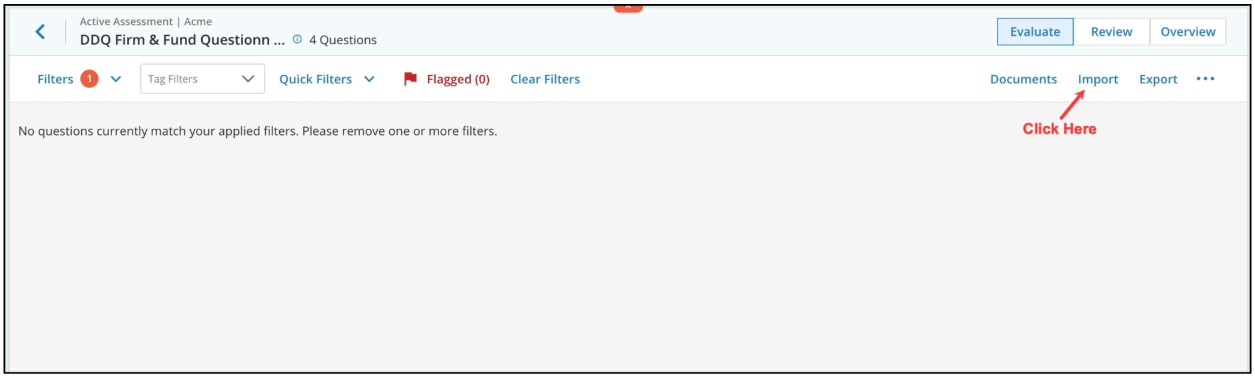
In the screen below, you can select which questions/sections you wish to export and select to export the assessment as a PDF or Excel file. Click the **Export** button to receive your file via email.



Import the Offline Answering File

To Import your Partner's answers back into the platform, select the Import options from the Evaluation screen or Active Assessments table.

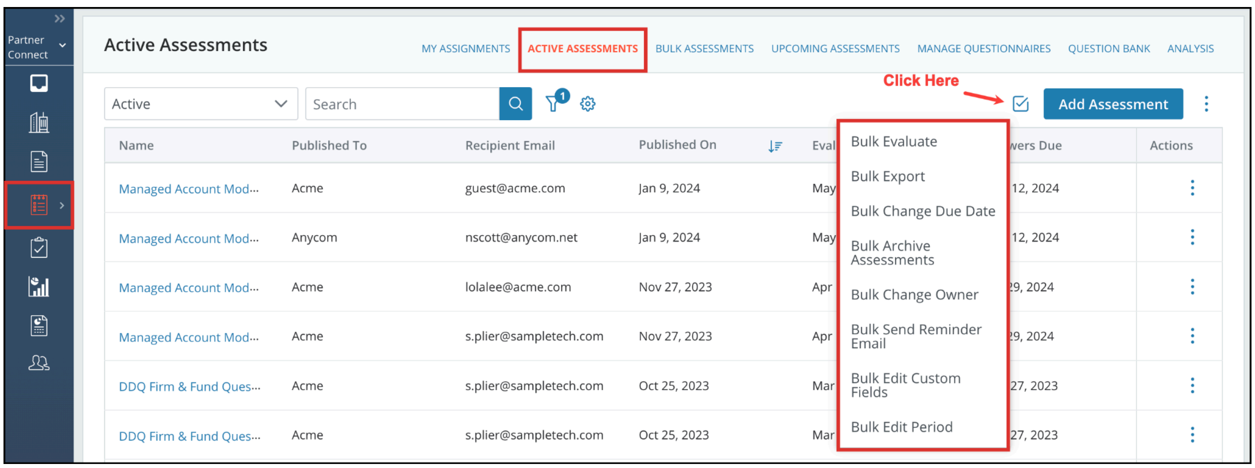




For more information on this process, please visit our article: [Import Assessments Answered Offline](#).

Bulk Actions

Our Bulk Actions feature lets users update multiple assessments at a time. To begin, click on the **Bulk Actions** icon, as shown below.

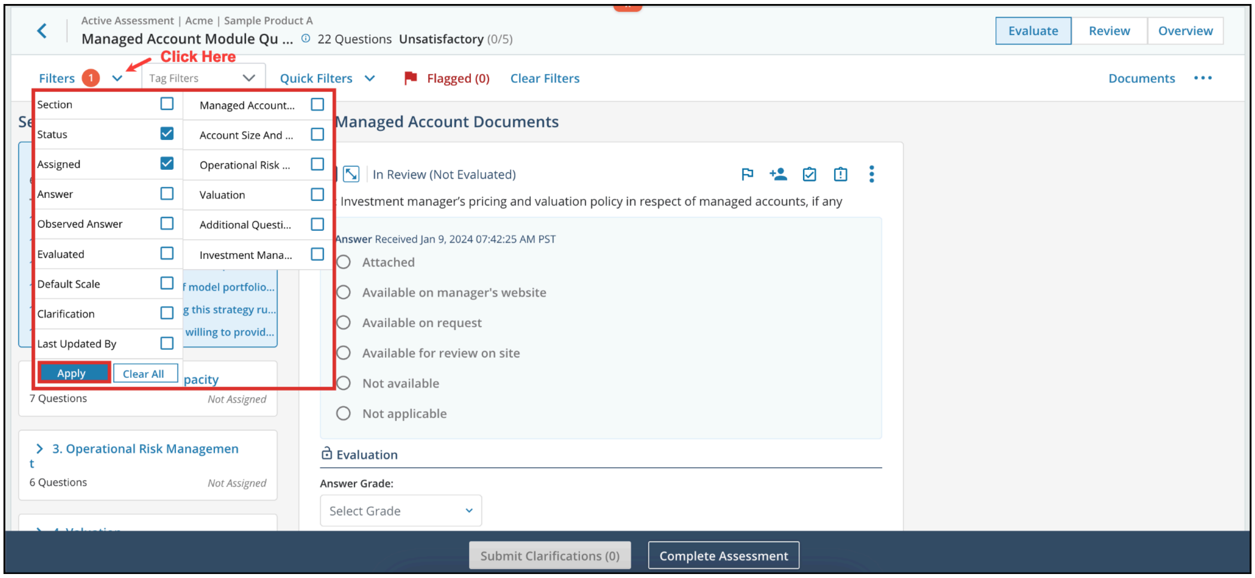


You can learn more about each bulk action function in our Help Center article here: [Assessment Bulk Options](#).

Evaluating an Assessment

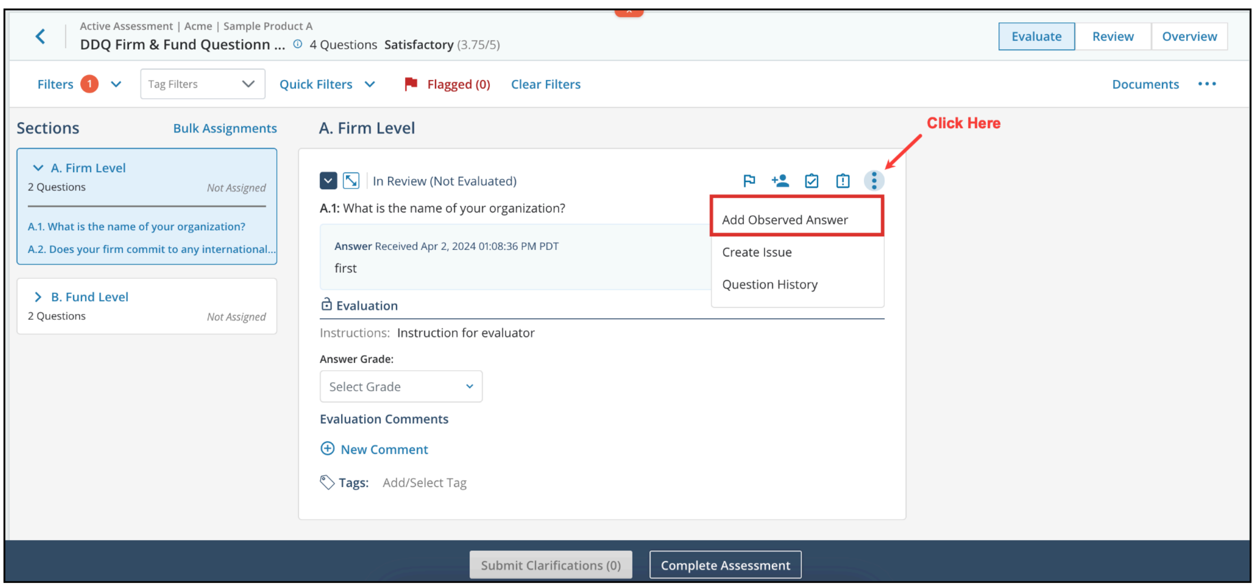
Using Filters for Evaluation

When evaluating a questionnaire, the platform provides the ability to filter by multiple dimensions to display questions that meet the criteria. To filter your questionnaire, select the **Filter** dropdown and click the **Apply** button to update your criteria.



Adding Observed Answers

During an evaluation, you can add observed answers to questions. Observed Answers are your answers added alongside the answers you received from the Partner.

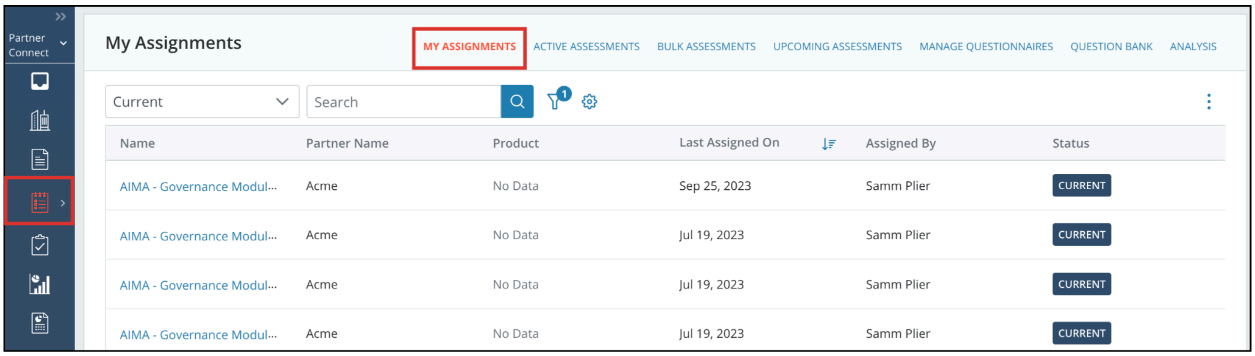


Visit our Help Center article here to learn more about adding observed answers: [Add Observed Answers].

Assigning Questions or Sections for Evaluation

During the process of evaluating an assessment, you have the option to manually assign a set of questions and/or sections to your colleagues. When the assignees have completed their assigned tasks, they will submit the questions back to you to complete the evaluation process.

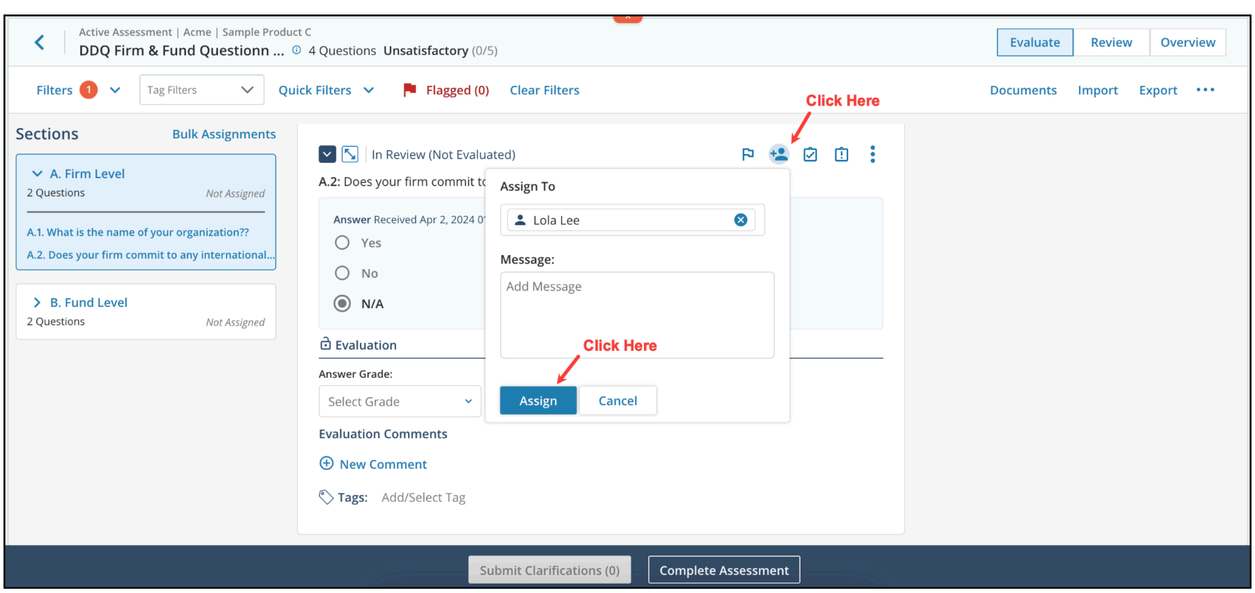
When you assign a question, the Assignees can view all their Assignments under the My **Assignments** tab from the **Assessments Module**.



Assigning an Individual Question

1. In an assessment, navigate to your question and click the **Assign** icon.

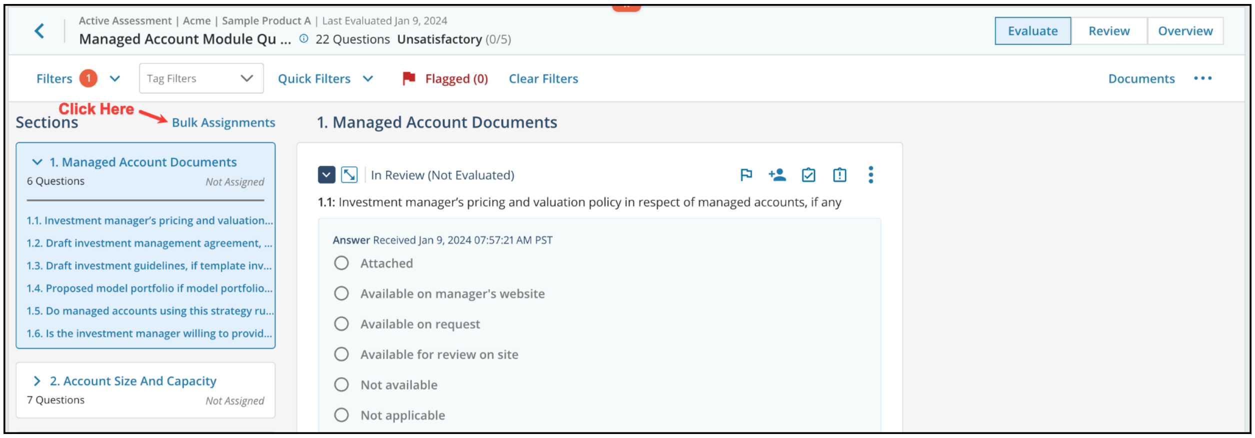
2. Click on the **Assign To** dropdown, select a user, and add an option message if necessary. Then, click on the **Assign** button to send the question.



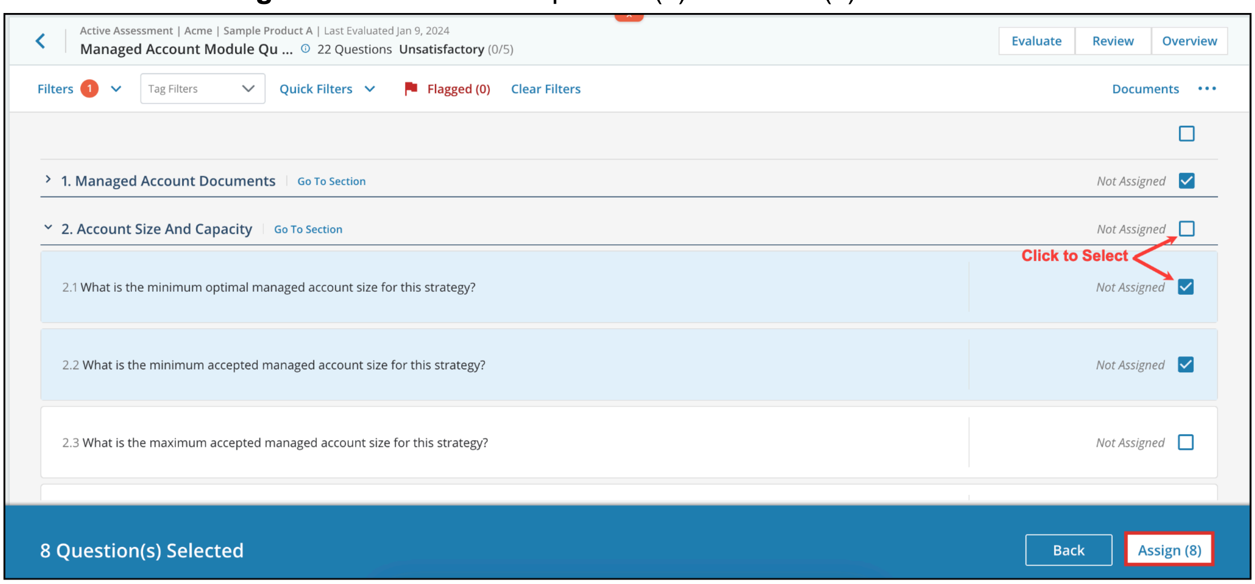
Bulk Assigning Questions

The "Bulk Assignments" feature lets you assign an entire section, questions, or assessment to a user for evaluation.

1. To bulk-assign questions, click on the **Bulk Assignments** at the top left.

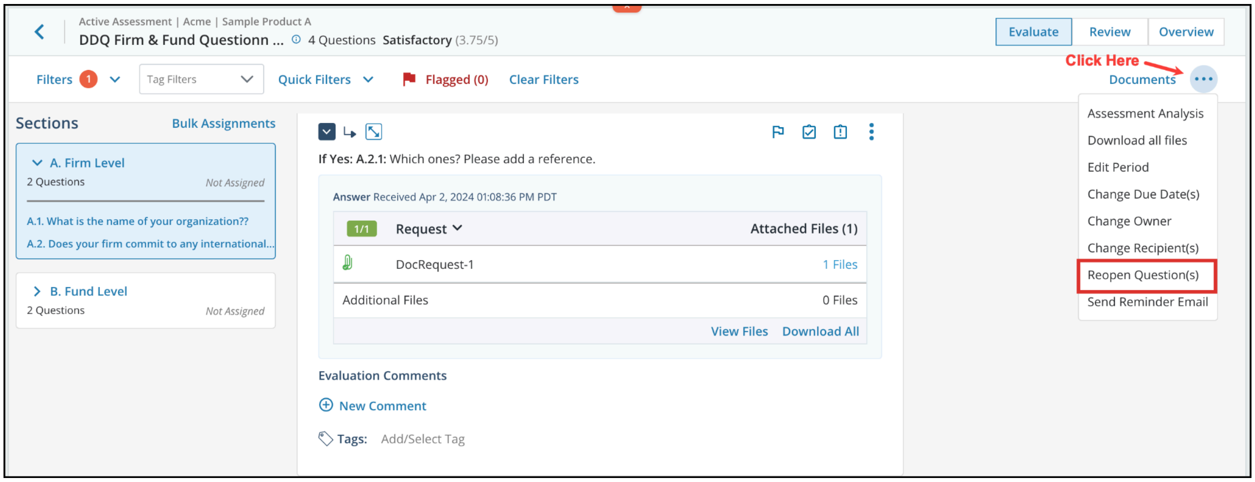


2. Select the question(s) or section(s) you want to assign to a user.
3. Click on the **Assign** button to send the question(s) or section(s).



Reopening Questions

During the evaluation process, Questionnaire Admins and Assessment Owners can reopen one or more questions to allow respondents to resubmit updated answers.



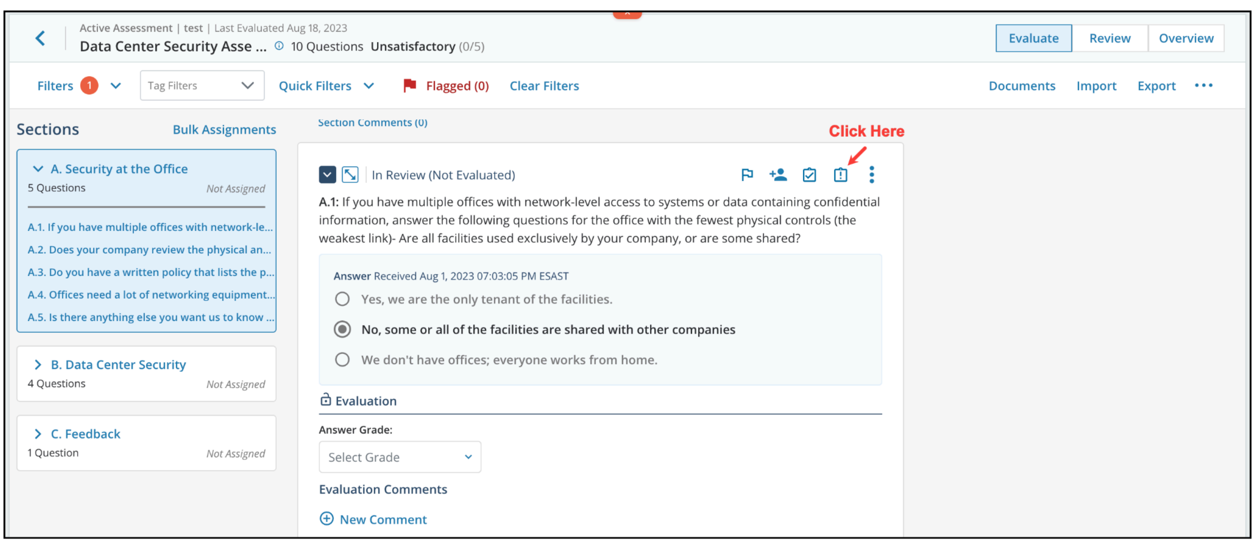
To learn more about this feature, click on the following article: [Reopening Questions](#).

Creating Clarifications

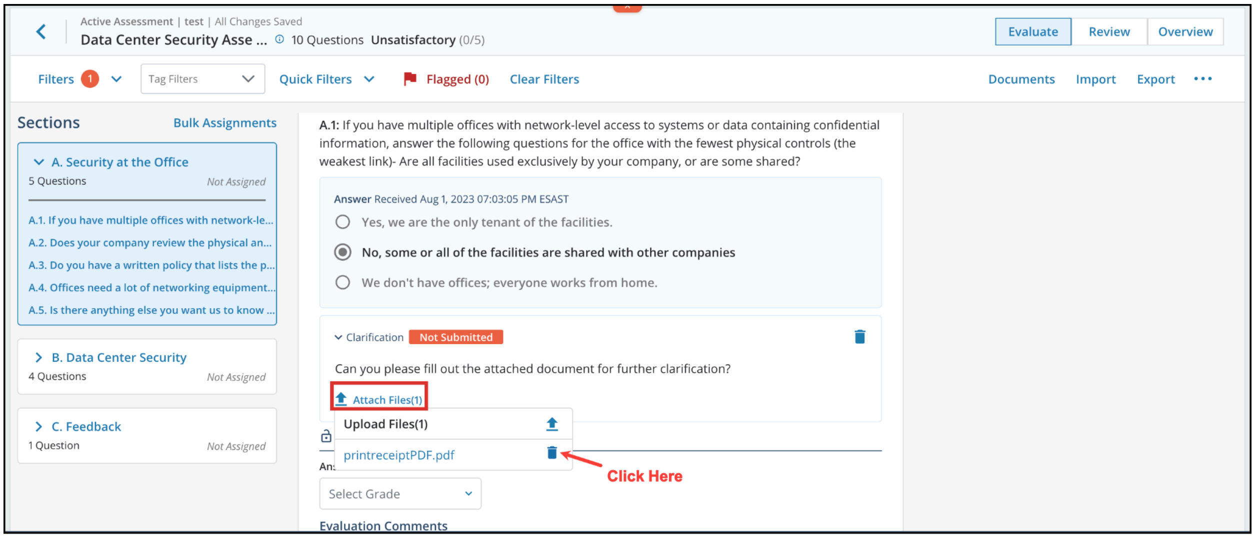
You can create clarifications during the evaluation process. Clarifications let users request additional information to add context to an answer.

Creating a Clarification

1. Navigate to a question to add a clarification.
2. Click on the **Clarification** icon as shown below.



3. Enter your clarification details and click on the checkmark to save the details.
4. You can include attachments on a clarification by clicking on **Attach Files**, as shown below. You can also remove any files using the **Delete** icon next to the file name.

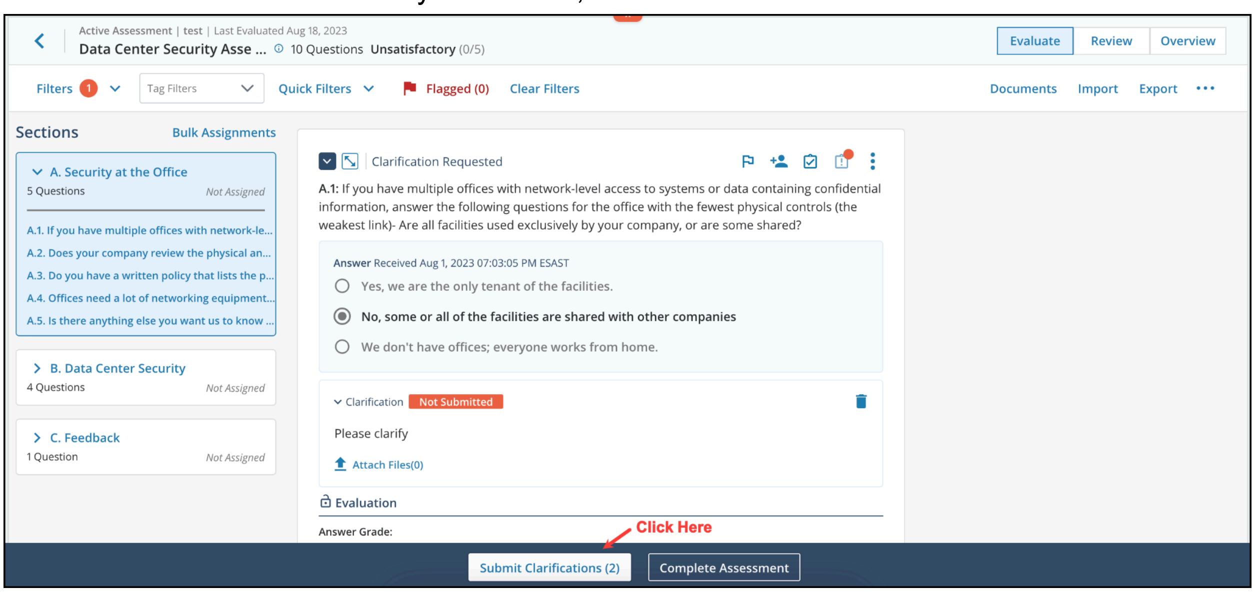


Please Note: You must submit your clarification(s) so your Partner can receive them.

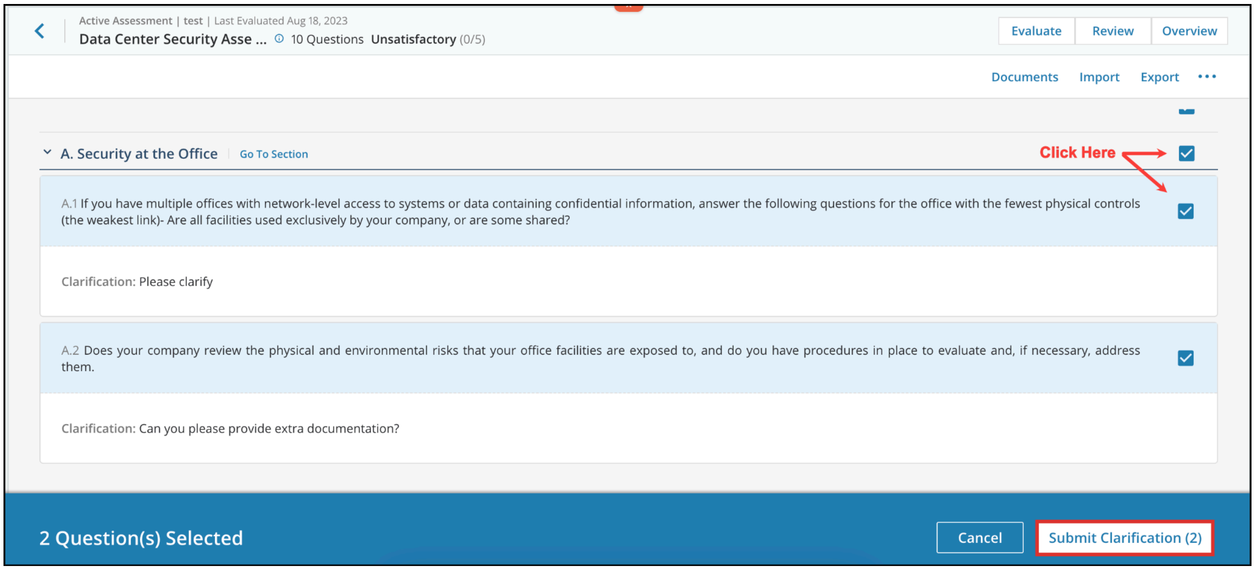
Submitting Clarifications

Only Questionnaire Admins and Assessment Owners can submit Clarifications. The **Submit Clarifications** button at the bottom shows the number of clarifications created and ready tto submit back to your Partner.

1. To submit the clarifications to your Partner, click the **Submit Clarifications** button.



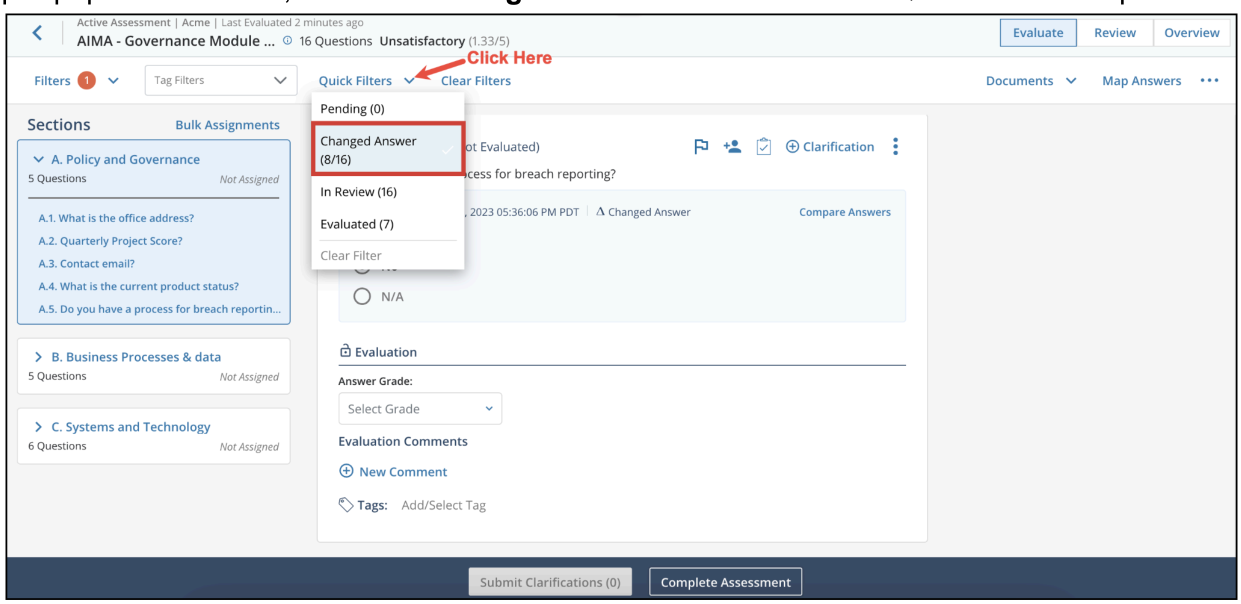
2. You can then review the details for clarifications before submission. Click the **Submit** button to proceed.



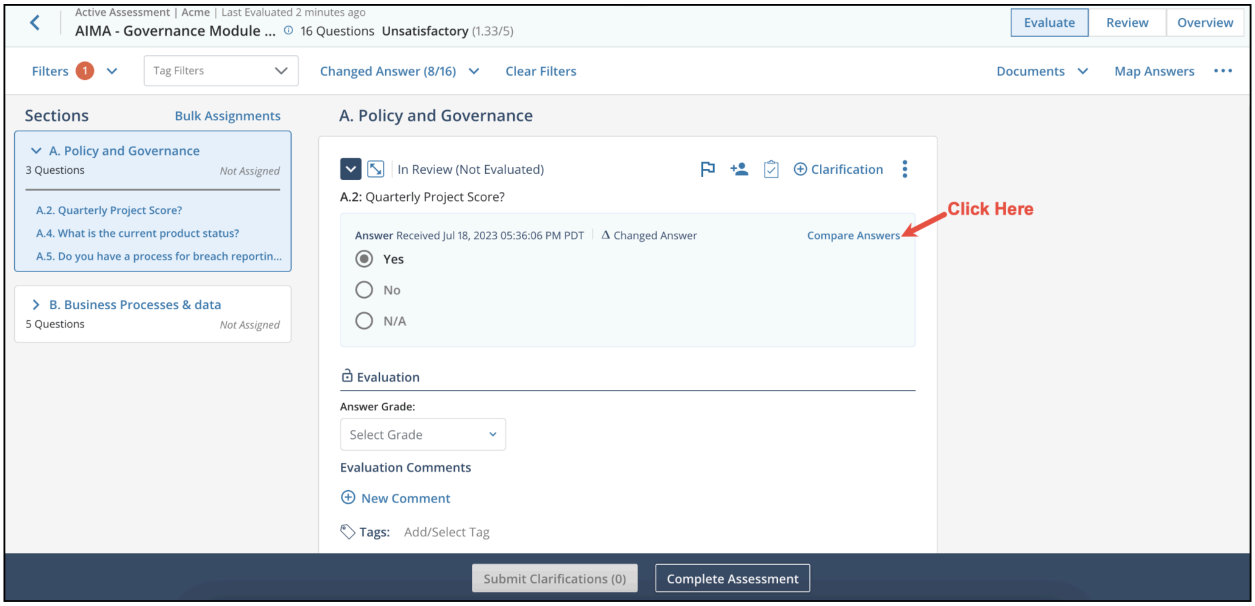
Please Note: Partners will receive a notification when they have new clarifications.

Comparing Changed Answers

When evaluating pre-populated assessments, users can compare any changed answers when new answers are submitted back. To view any updated answers that we changed from the pre-populated answer, utilize the **Changed Answers** filter under the **Quick Filters** dropdown.



When viewing a question with a changed answer, click **Compare Answers** link to see what has changed.



Please visit our Help Center article for more information: [View Changed Answers](#).

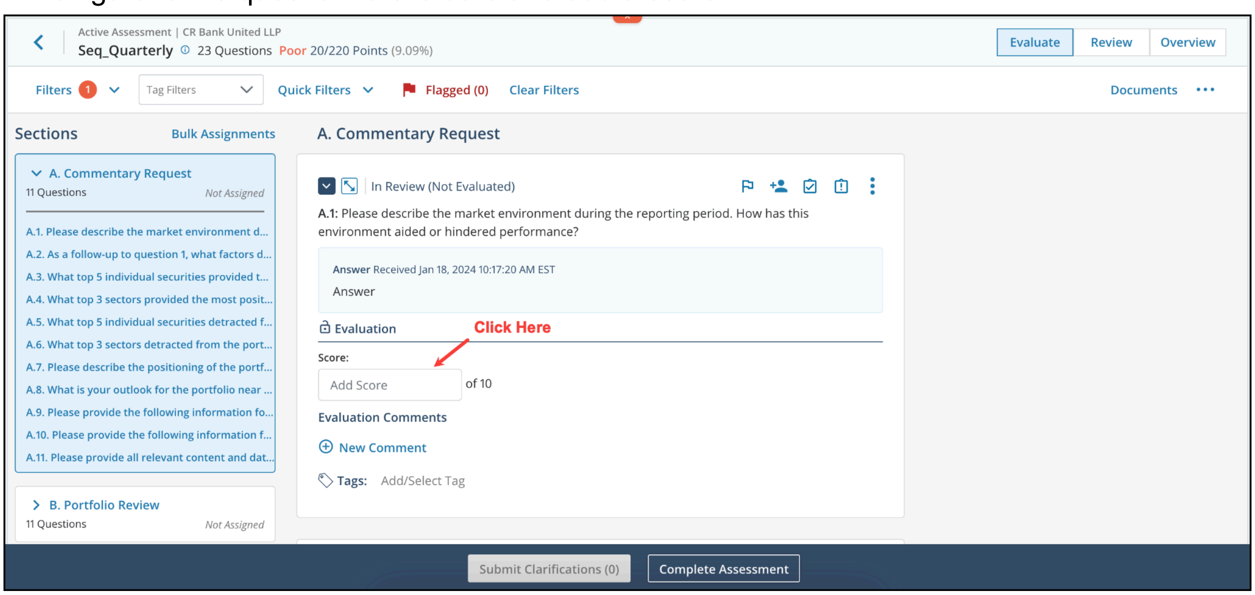
Evaluating Answers

Scoring an Answer

Part of the evaluation process is assigning grades or scores to your Partner's answers.

Please Note: You cannot evaluate questions until the recipient submits the answer. Unsubmitted answers show as Pending.

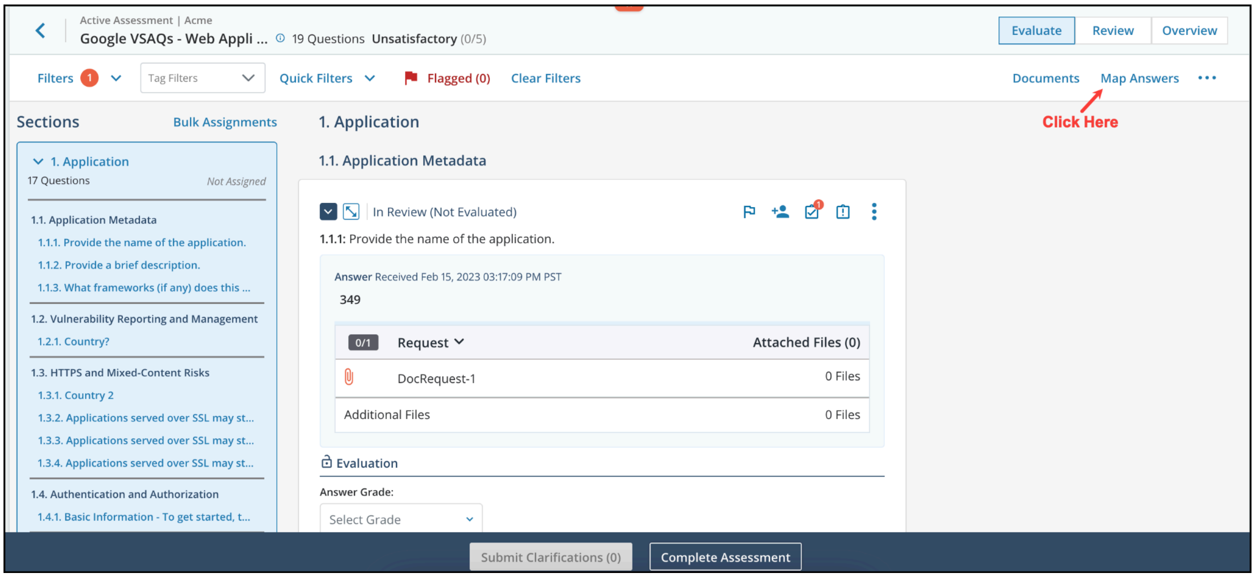
1. Navigate to the question to evaluate and add a score.



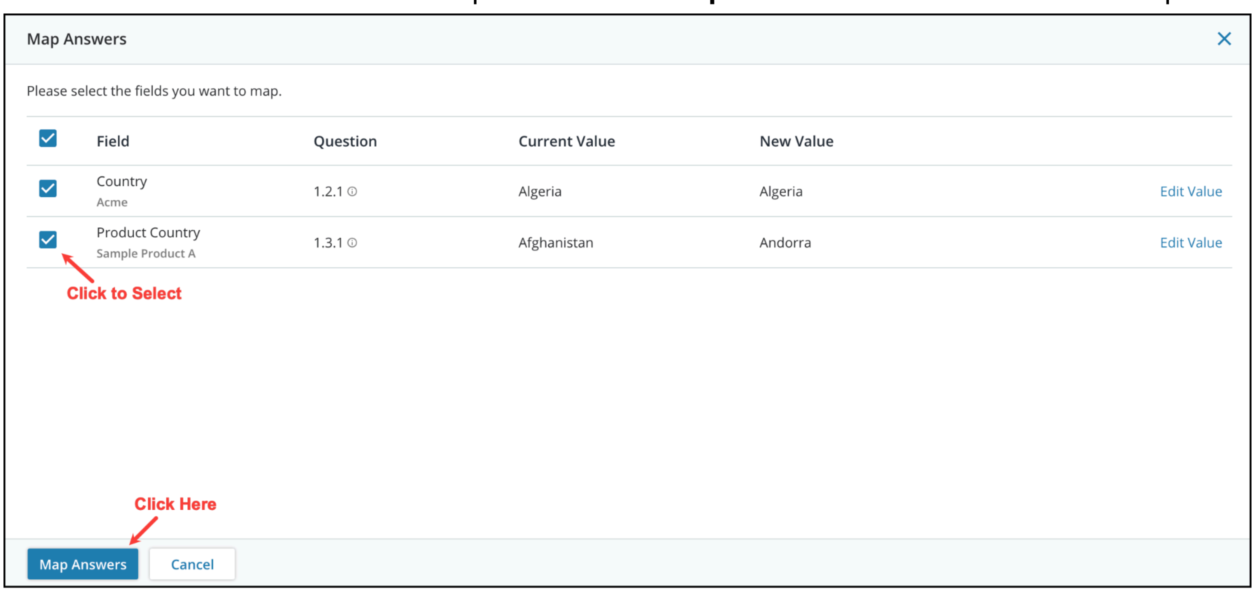
Mapping Answers During Evaluation

Users can use the Map Answers feature to update records associated with the assessment. This feature must be enabled when creating the questionnaire in order to be used in the assessment.

1. Open the relevant assessment. Click on **Map Answers** at the top right side of the page.

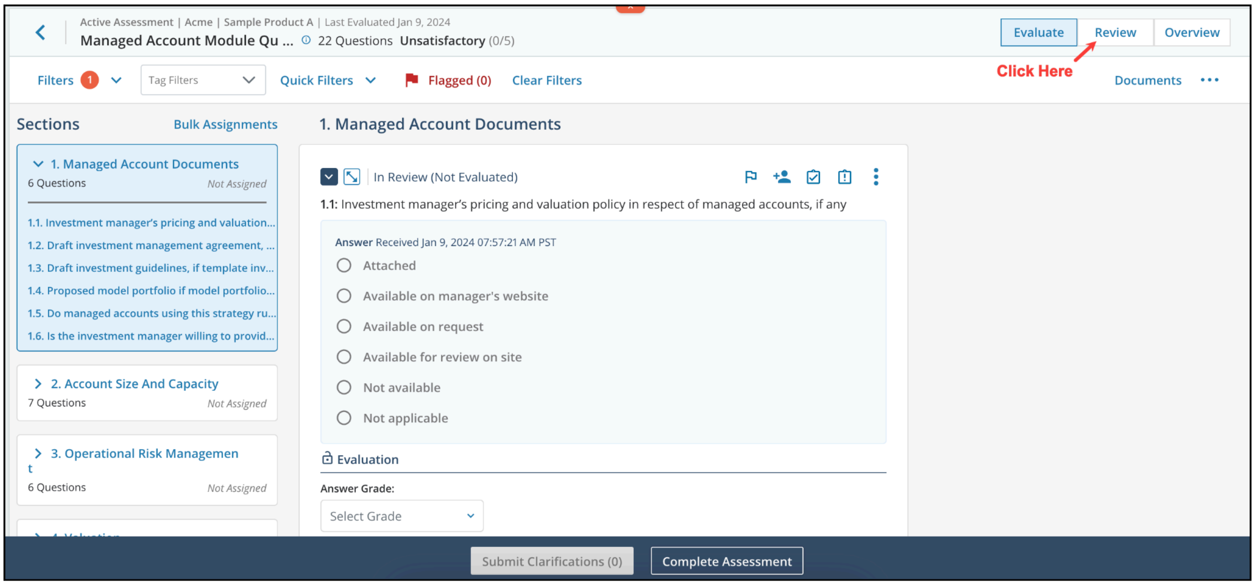


2. Confirm the attribute values to map and click the **Map Answers** button to confirm and update.



Reviewing an Assessment

The Review screen allows evaluators to review a summary overview of all received responses and evaluation scores at any time.

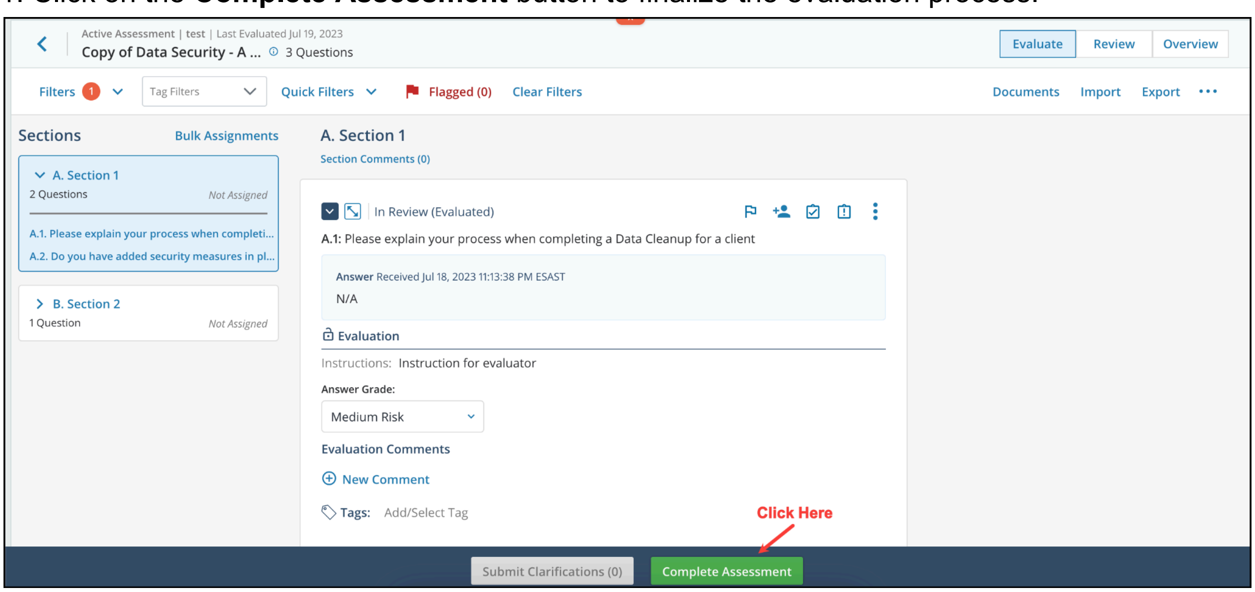


Completing an Assessment

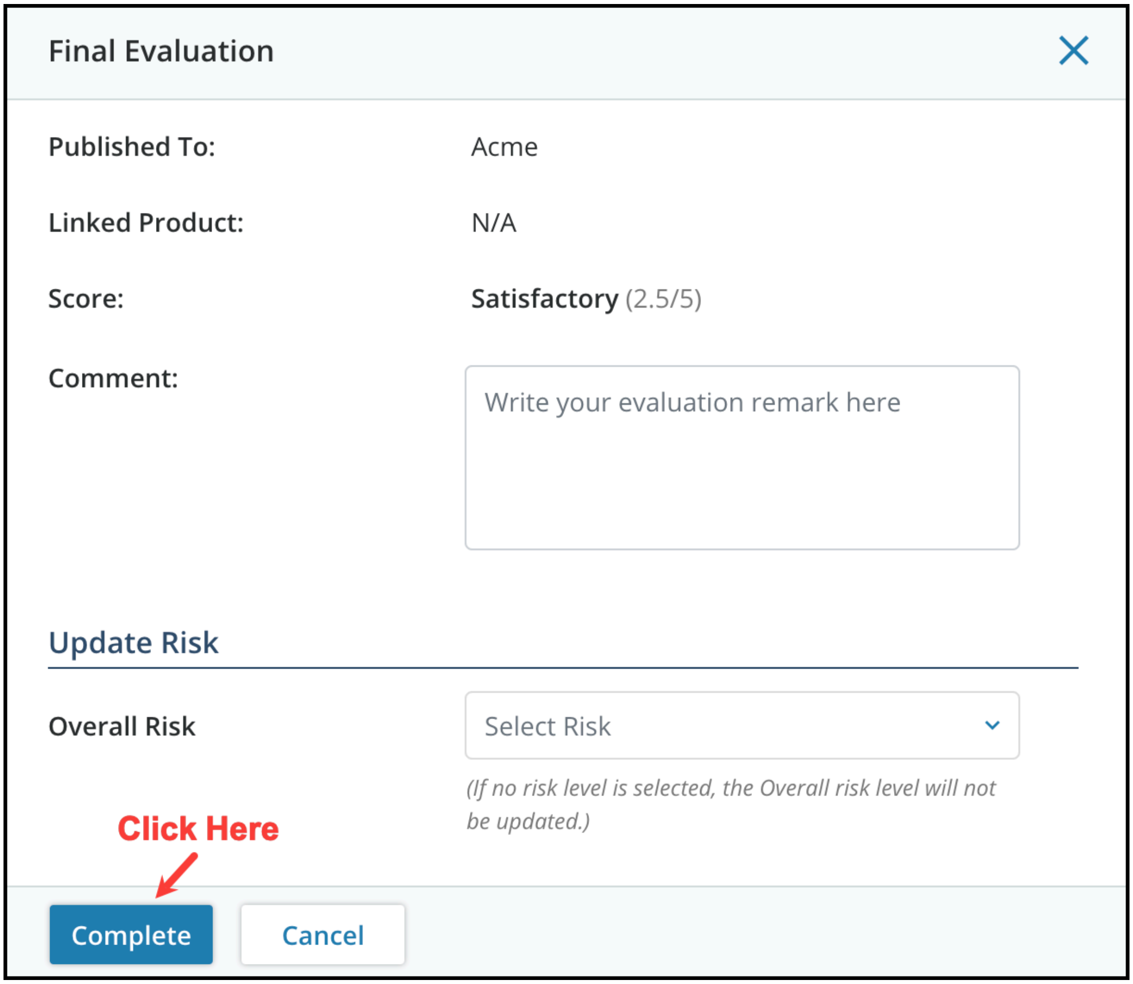
Completing an Assessment

When finalizing an assessment, the platform will present a calculated score.

1. Click on the **Complete Assessment** button to finalize the evaluation process.



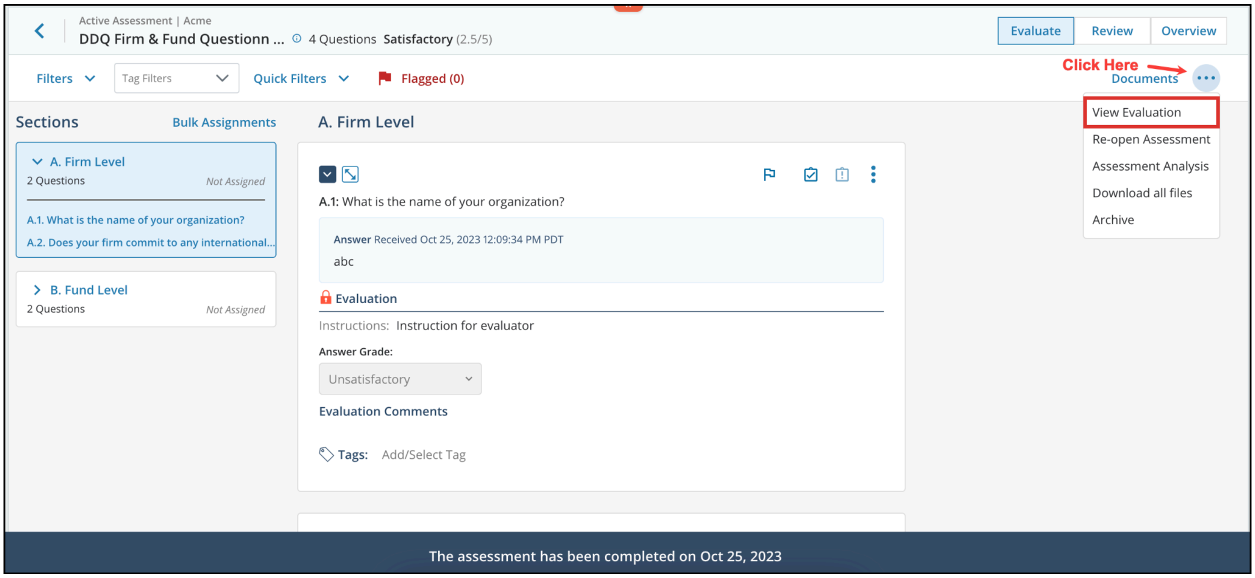
2. From this modal, you can review the final evaluation details of the assessment and add additional details, if applicable. Click **Complete** to finalize the evaluation process.



Viewing a Completed Assessment

After marking an assessment complete, you can review it in read-only mode.

1. Click on the **three dots** in the top right corner, then select **View Evaluation** to view the Evaluation summary for the Assessment.



Reopening a Completed Assessment

Reopening a completed assessment lets you re-evaluate or reopen questions to your partner for answering.

Note: Reopening an assessment removes the final evaluation score and comments. The assessment will no longer show as completed on reports until evaluated again.

To learn more about Reopening a Completed Assessment, Click the following article: [Reopening a Completed Assessment](#).