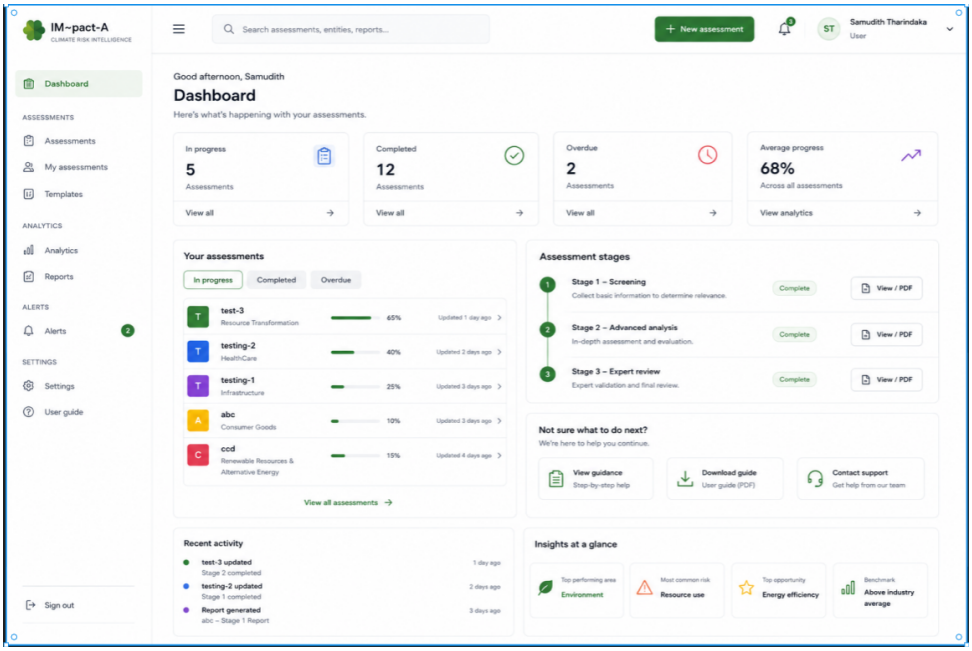
IMPACT-A

Guide 2 — Creating & Completing Assessments

A beginner-friendly walkthrough for starting an assessment, moving through the stages, and finishing correctly.



Purpose: A simple, step-by-step guide written so a first-time user can follow it without technical knowledge.

1. Before You Start

Have the information you need about the company, entity, project, or area being assessed. Keep supporting documents nearby if the assessment asks for evidence. Work carefully: clear and accurate information makes the final result more useful.

2. Create a New Assessment

Step 1: Select New assessment

From the top-right area of the Dashboard, select the green + New assessment button.

Step 2: Enter the basic information

Complete the fields shown on the assessment setup screen. Use clear names so you can easily recognize the assessment later.

Step 3: Choose the correct template

If templates are available, select the one that matches your assessment. A template controls the questions or structure you will work through.

Step 4: Review the details

Before creating the assessment, check the name, entity, category, and any other required information.

Step 5: Create the assessment

Select the button used to create or start the assessment. The new assessment should then appear in your assessment list.

> Good practice
>
> Use a consistent naming style. For example: Company Name — Assessment Type — Year. This makes searching and reporting easier.

3. Complete Stage 1 — Screening

Step 1: Open the assessment

Go to Assessments and select the assessment you just created.

Step 2: Read each question

Read the question completely before entering an answer. If a field is required, do not leave it blank.

Step 3: Enter accurate information

Use real information from the entity or available evidence. Do not guess when the system expects factual data.

Step 4: Save your work

Use the available Save, Continue, or Next action. Saving regularly reduces the risk of losing your progress.

Step 5: Finish the stage

Check that all required information is complete. Then continue to the next stage.

4. Complete Stage 2 — Advanced Analysis

Step 1: Review the information

Check the information collected in Stage 1 before continuing.

Step 2: Complete detailed analysis

Provide the requested detailed information. Take your time with values, categories, risks, and supporting evidence.

Step 3: Check for missing items

Look for blank required fields, unclear answers, or information that needs supporting evidence.

Step 4: Submit or continue

Use the available Continue, Save, or Submit action to move forward.

5. Complete Stage 3 — Expert Review

Step 1: Review the results

Read the assessment results and check whether the information is complete.

Step 2: Respond to review requests

If an expert or reviewer asks for changes, update the relevant information and save it.

Step 3: Complete the final review

Make sure there are no remaining required actions.

Step 4: Finalize the assessment

Use the final submission or completion action provided by the system.

Do not rush the final step

Once an assessment is finalized, changes may require additional review or permission. Always check your answers before final submission.

6. Checking Progress

The Dashboard shows a progress percentage for each assessment. The percentage is a quick indicator of how much of the assessment has been completed. It is not a quality score.

7. Common Mistakes to Avoid

- Starting with the wrong template.
- Entering unclear or incomplete information.
- Forgetting to save progress.
- Ignoring required fields.
- Finalizing before checking the results.
- Using inconsistent names that make assessments hard to find.

8. If You Get Stuck

First, read the field or stage instructions. Next, check the User guide or View guidance option. If the issue is still unclear, contact support and explain the assessment name, stage, and problem you are seeing.