

# Assessments

04/18/2024 11:37 am CDT

## Overview

With Assessments, you can gather data at the Agile Capability level for each **team, system, and organization**. The Assessment view allows authorized users of P2ANav to create new and manage existing assessments.



For details on facilitating capability assessments, see [Facilitating Agile Capability Assessments for Systems and Organizations](#).

For details on **Polling for Business Outcomes and Agile Outcomes**, see [Facilitating a Poll](#)

## Key User Interface Elements



Access to the Assessment view user interface elements is managed by individual P2ANav user permissions. Your screen may vary from the details displayed below.

## Assessments View

### No Assessments in Progress

1. If there are no assessments in progress, you'll see the Start New Assessment button.

There is no assessment in progress.

Start New Assessment

2. Click "Start New Assessment" to create an assessment for all levels of the company - organization, system, and team
3. Fill out the new assessment creation form:

- **Name:** A short descriptive name
- **Date:** Click to access a data selector
- **Populate:** If there are prior assessments published for the company, you can select one to populate the new assessment with prior data. All data will be included: Organization, system and team levels


4. Then click "Start Assessment." The assessment will be put into progress and will include all levels of the company - organization, system, and team.

### Assessment in Progress

Only one assessment can be in progress at a time.

A single assessment includes all levels of the company: Organization, System(s), and Team(s)

Users with appropriate permissions can manage details of an assessment in progress:

- **Name and Date:** Click the pencil icon , then edit the field. Changes take effect when you click out of the field
- **Tag:** Optional. Used to filter published assessment filter. Existing tags will display in the drop-down:

- **Delete Assessment:** All data for all levels in the company for this assessment will be deleted. This cannot be undone.
- **Publish Assessment:** This assessment will be published for all levels: organization, System(s), and

Team(s). The results will be published to the [Map](#) and [Capabilities](#) views, and will be used to update P2A index calculations on the [Prioritization](#) view.

## Managing and Launching Assessments

The in-progress assessment view will display a hierarchy of all Path to Agility levels.



Use the "toggle" to expand or collapse level children view



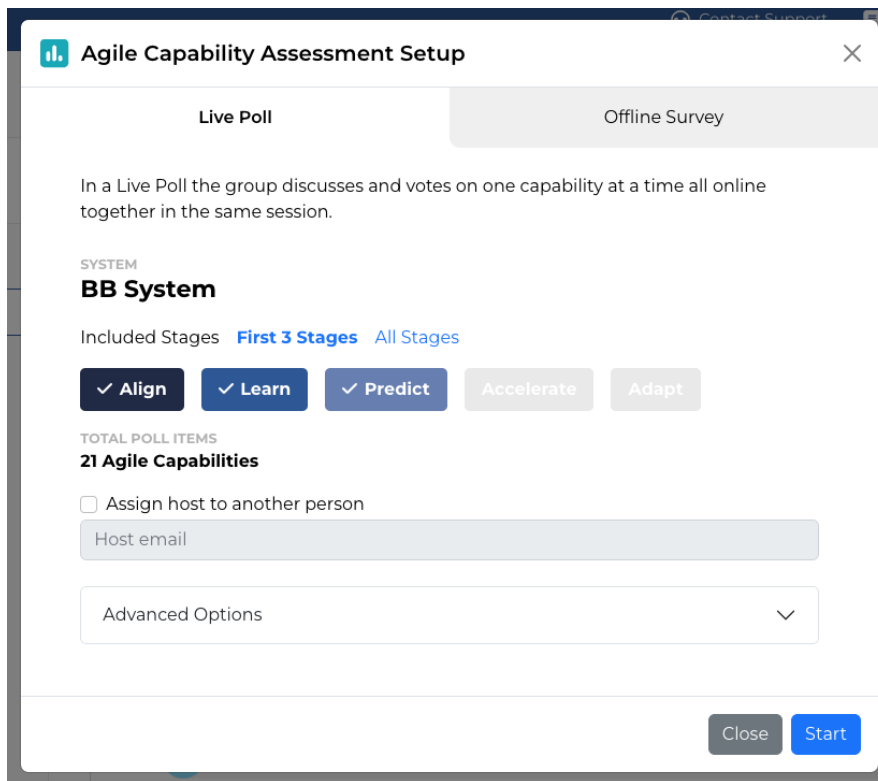
Each level has Interface elements that impact only that level. These elements are described below.

### Launch an Assessment



If an assessment **has not been started**, clicking the assess button next to a level opens the Agile Capability Assessment Setup Option for that layer

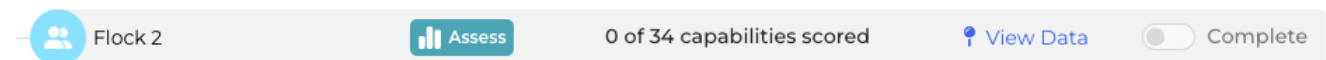
- **Included Stages:** Chose from [Path to Agility stages](#)
- **Assessment Options**
  - Live Poll – See [Facilitating a Live Poll](#)
  - Offline Survey – See [Facilitating an Offline Survey Assessment](#)
- **Assign host:** Available for Live Polls only. Optional. Enter the email address of another P2ANav user who will host the assessment
- **Start:** Starts the assessment for that level. For details see [Facilitating Agile Capability Assessments for Teams, Systems and Organizations](#)



If the assessment for a level **has been started**, the button text will read either **Continue Poll** or **Continue Survey**, and clicking the Assess button brings the host to the assessment facilitation view.

## Assessment Scoring Status

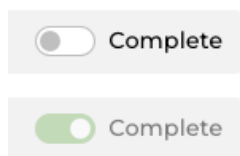
Each row in the assessment view will display the number of Agile Capabilities that have been scored compared to the total number of Agile Capabilities for that level.



## Assessment Completion

During an [assessment facilitation session](#), the host can mark that level's assessment as complete.

Assessment completion status can also be changed from the assessment view screen (provided at least one capability has been scored) using the Complete toggle for that level:



## View Data

Clicking on "View Data" will open the corresponding [Capability Heatmap](#)

## Publishing Assessment

When your organization has finished assessing all of the capabilities you want to assess at each level, click "Publish Assessment" to mark the organization's assessment complete.

[Publish Assessment](#)

### Publish Assessment

This assessment will be published for the entire organization.

Are you sure you want to publish this assessment? It will no longer be the active assessment and the results will be published to the progress page.

Cancel

Publish Assessment

Published assessments will then be selectable via the assessment filter drop for use on:

- [Capabilities Heatmap](#)
- [Capability Prioritization](#)
- [Path to Agility Map](#)



For details on facilitating assessments, see [Facilitating Agile Capability Assessments for Systems and Organizations](#)