# Archer Questionnaire Assistant

In the realm of risk management, professionals and organizations often face the challenge of conducting thorough risk assessments, which often involve an extensive array of questions. These assessments are vital for identifying and mitigating potential hazards, vulnerabilities, and liabilities in various domains such as financial, environmental, operational, and cybersecurity. However, the abundance of questions in risk assessments poses a significant problem, as it can lead to several inefficiencies and uncertainties, hindering the effectiveness of the risk assessment process.

Risk assessments often consist of many questions, which can overwhelm assessors and stakeholders. The sheer volume of questions can lead to cognitive fatigue and reduced attention to critical risk factors. Identifying unanswered questions within an extensive assessment presents a hurdle for business users who need to save their progress and complete the assessment later. In instances where an assessment includes mandatory sections, business users must find and respond to the required questions prior to saving the assessment.  This task can become burdensome when the assessment encompasses many mandatory questions.

The challenge is to develop innovative approaches, methodologies, and tools to streamline and optimize the risk assessment process when it involves many questions. This should enable organizations and risk professionals to conduct comprehensive risk assessments efficiently, extract actionable insights, engage stakeholders effectively, and proactively manage the identified risks in an ever-evolving landscape.

Archer streamlines the business user experience in assessments by offering a feature that enables users to easily gauge their progress, find which questions still lack responses, and swiftly navigate to the unanswered questions.

The Archer Questionnaire Assistant Tool & Utility is a custom code that can be added to any questionnaire and provides real time information/display of the questions that have not been answered by the user. The unanswered questions are displayed at the top of the record and the administrator can customize the quantity displayed.

On this page

* [Release notes](#Releasenotes)
* [Overview](#Overview)
  + [Benefits](#Benefits)
  + [Prerequisites (ODA and system requirements)](#PrerequisitesODAandsystemrequirements)
* [Archer Questionnaire Assistant Tool & Utility components](#X527903be406e0282424b779ac37a85f338863ae)
  + [Architecture](#Architecture)
* [Installing Archer Questionnaire Assistant](#InstallingArcherQuestionnaireAssistant)
* [Configuring Archer Questionnaire Assistant](#ConfiguringArcherQuestionnaireAssistant)
  + [Configure Percentage of Questions Displayed](#ConfigurePercentageofQuestionsDisplayed)
  + [Configuring Question fields](#ConfiguringQuestionfields)
* [Troubleshooting](#Troubleshooting)
* [Certification environment](#Certificationenvironment)

## Release notes

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| --- | --- | --- |
| Release Version | Published Date | Notes |
| Archer 6.14 v3 | May 2024 | Improved tracking changes for Date and Attachment fields and addressed the following issues:   * Record layout scrolling * Tracking of modifications following access to a cross-reference lookup window * Inappropriately tracking Attachment and Cross-reference type question fields for Archer platform version 6.14 P2 |
| Archer 6.14 v2 | February 2024 | Updated Installing Archer Questionnaire Assistant Tool & Utility-Instruction about addition of script tags by the user has been removed |
| Archer 6.14 v1 | November 2023 | Initial Release |

## Overview

### Benefits

The Archer Questionnaire Assistant enables organizations to:

* Display the percentage of questions without responses based upon set threshold value.
* Customize the threshold value for unanswered questions in each assessment.
* Provide clickable links to navigate to unanswered questions.
* Implement the capability within any questionnaire which can be used for all question types including dropdown, radio buttons, checkboxes, list box, values pop-up and more.

### Prerequisites (ODA and system requirements)

The following table lists the components and prerequisites for the Archer Questionnaire Assistant Tool & Utility.

|  |  |
| --- | --- |
| Components | **Prerequisites** |
| Archer Solution Area(s) | Any |
| Archer Use Case(s) | Any |
| Archer Applications | Any application using Questionnaires |
| Uses Custom Application | Yes |
| Requires On-Demand License | No |
| Archer Requirements | Archer 6.14 and later |
| Supported Archer Environments | * On-Premises * Archer Hosted * Archer SaaS |

## Archer Questionnaire Assistant Tool & Utility components

### Architecture

The Archer Questionnaire Assistant Tool & Utility is a custom code written in JavaScript/jQuery. It displays the unanswered question in a tabular format. It uses the HTML DOM (Document Object Model) of the Questionnaire to find the questions responses.

It also captures the real time changes to the questions by find the underlying HTML DOM events associated with the questions.

It does not make any Web API calls resulting in faster refresh of the Questionnaire utility table.

## Installing Archer Questionnaire Assistant

1. Create a custom object and place it at the bottom of the layout builder.

* **Note:** Although the code execution starts only after the DOM loading is complete, however it is a better practice to place the code at the bottom of the layout.

1. Copy the code from Archer\_Questionnaire\_Assistant\_6.14\_Installation\_Package\_v3.zip file and paste it in the Code field of the Custom Object Properties.
2. Select Display when editing a record at the Display section of the custom object.
3. Click on Save properties and Save layout.

* **Important:** If deploying this custom object on a layout that also has the Reformat Layout Custom Object custom object, the Questionnaire Assistant Custom Object must be placed after the Reformat Layout Custom Object on the layout (either to the right of it or below it).

## Configuring Archer Questionnaire Assistant

### Configure Percentage of Questions Displayed

There is a global variable, Global Answered Percentage, in the custom code with default value set to 70. This value should be interpreted as a threshold above which the unanswered questions are displayed. It can be set by the user as needed for different questionnaires. The calculation of the variable is based on the following formula:

Global Answered Percentage = (Questions Answered / Total Questions) \* 100.

For example, assume that the global variable Global Answered Percentage is set at 60 for a questionnaire. It means that the Archer Questionnaire Assistant Tool & Utility will only be displayed after the user responds to 60% of the questions in the questionnaire.

### Configuring Question fields

The Archer Questionnaire Assistant Tool & Utility has been tested with the settings for the Questions fields mentioned in the table below.

**Note:** The Archer Questionnaire Assistant Tool & Utility may not behave correctly for other settings and/or Question field types. The Question field types in the Questionnaire should have the following settings.

| Question type | Display Advance Formatting options | Other options |
| --- | --- | --- |
| Dropdown | Horizontal (Display Field Name) | DISPLAY CONTROL:  Radio buttons  CONFIGURATION:  Minimum selections: No minimum  Maximum selections: 1 |
| Radio buttons | Horizontal (Display Field Name) | DISPLAY CONTROL:  Radio buttons  CONFIGURATION:  Column layout: 1 |
| Check-box | Horizontal (Display Field Name) | DISPLAY CONTROL:  Check boxes  CONFIGURATION:  Minimum selections: No minimum  Maximum selections: 12  Column layout: 6 |
| List box | Horizontal (Display Field Name) | DISPLAY CONTROL:  List box  CONFIGURATION:  Minimum selections: No minimum  Maximum selections: 12  Field Height: 5 |
| Values pop-up | Horizontal (Display Field Name) | DISPLAY CONTROL:  Values pop-up  CONFIGURATION:  Minimum selections: No minimum  Maximum selections: 2 |
| Text | Horizontal (Display Field Name) | DISPLAY CONTROL:  Single-line text field  CONFIGURATION:  Minimum Characters:  Input Mask:  Default Text: |
| Numeric | Horizontal (Display Field Name) | CONFIGURATION:  Decimal Places:  Negative Display: -1234.56  Increment By: No Increment  Minimum Value:  Maximum Value:  Prefix:  Suffix: |
| Date | Horizontal (Display Field Name) | DISPLAY CONTROL:  Text Box-Date  CONFIGURATION:  Default Value: None |
| Rich Text Editor | Horizontal (Display Field Name) | DISPLAY CONTROL:  Multi-line text area  CONFIGURATION:  Maximum Characters:  Field Height: 1  Default Text: |
| Cross Reference | Horizontal (Display Field Name) | DISPLAY CONTROL:  GRID  DISPLAY FORMAT:  Column-Hierarchical |
| Attachment | Horizontal (Display Field Name) | CONFIGURATION:  Minimum Attachments: No minimum  Maximum Attachments: No maximum  Maximum Size: 10 MB  Display Fields: Name, Size, Type, Upload Date, Downloads, History |

## Troubleshooting

The following points should be considered while using the Archer Questionnaire Assistant.

* Reacts in real time to the following question types:
  + Value-List -Dropdown, Radio buttons, Checkboxes, List box and Values popup
  + Text
  + Numeric
  + Date
  + Rich Text Editor
* Reacts to questions hidden by DDEs (Data Driven Events) during the questionnaire first load or after the Save/Edit button has been clicked.
* In cases where the questions are hidden/displayed on account of a user interaction in the Questionnaire (based on DDE actions), the utility will not update to hide/display the question numbers accordingly. To update the questions number in the Questionnaire utility, click the Save button.
* In the case of questionnaires having multiple tabs, the navigation between tabs will not update the question numbers in the Questionnaire utility. To update the questions number in the Questionnaire utility, click the Save button.
* The threshold is set at a tab level and the calculation changes when user navigates to a new tab by the new sets of questions.
* The custom code is configured to work only on the default HTML layout or layouts that have been changed with the Reformat Layout Custom Object found in the Archer Enhanced User Experience Tool & Utility to find the status of the Archer Questions. It may not work if any other custom code changes the default HTML layout of the questionnaire.
* In case the Questionnaire Utility is not responding, click on SAVE button to refresh the custom code.

## Certification environment

Date Tested: February 2024

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| --- | --- | --- |
| Product Name | Version Information | Operating System |
| Archer | 6.14 | Windows |