

# Export Assessment to PDF

Risk Assess Guide  
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# Introduction

The following document provides an overview of how to Export an assessment, and how to save it as a PDF.

## Export Assessments to PDF

### Business Need

One of the most important aspects of managing third parties is to communicate expectations and performance effectively. Risk Assess customers use **Assessments** to directly source information from internal and external stakeholders. As part of the overall process of conducting such assessments, more often than not, clients want to have the ability to send completed assessments back to respondents. Asking the respondent to review a completed assessment online is not always desirable. There is a need to send a summary in an offline format that is standards based and that can be easily customized by the client. With this need in mind, Risk Assess has introduced the ability to export an assessment to a PDF file.

### Feature Overview

This capability relies on a previously defined XSL (Extensible Stylesheet Language) file to “transform” the XML document that represents a completed assessment into a PDF document for consumption by various stakeholders.

To represent an assessment in PDF requires that a XSLT (Extensible Stylesheet Language Transform) file be specified and linked to the assessment. The Risk Assess Community tab provides a default XSLT file that exports any assessment to a PDF document and is formatted in a pre-defined format.

It is possible to author an assessment-specific XSLT file to transform and format into a PDF as per client and assessment-specific requirements. To do so clients will need to follow the steps outlined below:

- ❖ Enable the Export to PDF capability in your instance of Risk Assess
- ❖ Develop your own Assessment-specific XSLT
  - Enable export Assessment to XML format
  - Download XML document for the Assessment
  - Author and upload your own XSLT
  - Export your Assessment to PDF

## Enable “Export to PDF” for your instance of Risk Assess

Each Assessment can be represented as an XML document. This ability needs to be enabled first.

- ❖ Download the Evaluation Default HTML, Evaluation Default PDF files from Risk Assess Community Library.
- ❖ Upload both file to [Configuration Files](#) under Admin as an HTML and FO output format type respectively.

Name	Type	Format Type	File	Status
<a href="#">Default Evaluation</a>	Program Result Summary	HTML		Active
<a href="#">Default Evaluation</a>	Program Result Summary	FO		Active

- ❖ This shall enable the ability to export any Assessment that is either completed or pending Approval.

## Enable your own Assessment-specific XSL

### Enable export assessment to XML format

- ❖ Download the ShowXML file from Risk Assess Community Library.
- ❖ Upload it to [Configuration Files](#) under Admin as an HTML output format type.

### Download XML document for the Assessment

- ❖ Go to a completed assessment that you want to format/export to PDF

Overall Scores	Internal
STATUS: Completed	SCORE: 80.00
FINAL SCORE: 80.00	OVERVERRIDE:

[Action Plan](#) | [Change Log](#) | [Detailed Status](#) | [Result Summary](#)

- ❖ Click on [Result Summary](#). This will show a popup window.

## Result Summary

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- [Default Evaluation \(FO\)](#)
- [ShowXML \(HTML\)](#)
- [Default Evaluation \(HTML\)](#)

✕ Close

- ❖ Click on [ShowXML \(HTML\)](#). This will open a new window and provide an XML representation of this assessment.
- ❖ From the Browsers menu click on File >> Save As to save this as an XML file (save the file with a .xml extension). This is the XML representation (of the Scorecard) that can then be used to author the custom XSLT file to be used in subsequent steps.

## Author and upload your own XSLT

- ❖ Write your own XSLT using the XML document representing the Assessment from the previous step.
- ❖ Save this as a separate XSL file. For example, you could call it Assessment1.xsl.
- ❖ Upload this Assessment1.xsl to Risk Assess from Admin >> Configuration files as an FO file.

## Export your Assessment to PDF

- ❖ Open a completed assessment
- ❖ Click on [Result Summary](#). This will now provide a popup window to allow the user to select an appropriate XSL File to use to transform to PDF.

## Result Summary

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- [Assessment 1 \(FO\)](#)
- [ShowXML \(HTML\)](#)
- [Default Evaluation \(HTML\)](#)

✕ Close

Click on the link [Assessment 1 \(FO\)](#) to export to PDF.