

Create an Application & Activities

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For more detailed information on applications and activities, see the Applications section in the **Resolver Core Administrator's Guide**.

Create an Application & Activity

If your organization currently has a Portal application, it's recommended the activity referenced in the instructions below is also created in the portal for use by the Plan Owner role.

To create an application and activity:

- 1. Click the 👸 icon in the top bar > Applications in the Application Management section.
- 2. Click Create Application.
- 3. Enter Risk Response in the Name field.

dmin : Create Application	
Name	
Risk Response	
Description	
	<i>h</i>
	CANCEL
The Create Application p	

- 4. Click **Create** to display the **Edit Application** page.
- 5. Click Create an Activity.
- 6. Enter Risk Response Plans in the Name field.



dmin: Edit Application		
Risk Response		Ø
Activities		
Name		
Risk Response Plans		
Description]
Basic Markdown Formatting		\oplus
	CANCEL	✓ CREATE
There are no Activities on this Application		

The Edit Application page.

7. Click Create.

Create an Action

If creating this activity in a portal, one view for all plans in both the Active and Pending Update workflow states may suffice. In this case, these views would use the Plan Owner forms.

To create a new action:

- 1. From the Edit Application page for Risk Response, click the Risk Response Plans activity.
- 2. Click Add Action.
- 3. Enter Create Risk Response Plan in the Action Name field.
- 4. Ensure **Create Object** is selected in the **Action Type** dropdown menu.
- 5. Select **Risk Response Plan** from the **Object Type** dropdown menu.
- Ensure Default Form is selected in the Define Form to Show When Creating New dropdown menu.

Resolver.

Actions		
There are no Actions on this Activity		
Action Name		
Create Risk Response Plan		
Action Type		
Create Object		~
Object Type		
Risk Response Plan		~
Define Form to Show When Creating New		
Default Form		~
	CANCEL	✓ CREATE

The Actions section of the Edit Activity page.

7. Click Create.

Create a Form View

To create a form view:

- 1. From the Edit Activity page for Risk Response Plans, click Add View.
- 2. Enter **Draft Plans** in the **Name** field.
- 3. Select **Risk Response Plan** in the **Object Type or Assessment** dropdown menu.
- 4. Select **Draft** in the **Workflow States** dropdown menu.

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Views		
There are no Views on this Activity		
Name		
Draft Plans		
Description		
		/}
Basic Markdown Formatting		\pm
Object Type or Assessment		
Risk Response Plan		~
Workflow States		
Draft ×		~
View Action		
Form		~
Define Form to Show		
Default Form		~
Display Options		
Show view title when empty		~
	CANCEL	✓ CREATE

The Views section of the Edit Activity page.

- 5. Click Create.
- Repeat the above steps to create two equivalent views for the Active and Pending Update workflow states.

Create a Report View

Note that the following report is not required in the Portal application.

To create a report view:

- 1. From the Edit Activity page for Risk Response Plans, click Add View.
- 2. Enter Plan Status Report in the Name field.
- 3. Select **Company** from the **Object Type or Assessment** dropdown menu.
- 4. Select **Active** in the **Workflow States** dropdown menu. Note that the **Draft** workflow state may also be selected.
- 5. Select Report in the View Action dropdown menu.
- Select Company Risk Response Plan Tracker in the Define Report to Show dropdown menu.

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Name		
Plan Status Report		
Description		
		/
Basic Markdown Formatting		\oplus
Object Type or Assessment		
Company		~
Workflow States		
Active ×		~
View Action		
Report		\sim
Define Report to Show		
Company - Risk Response Plan Tracker		~
Display Options		
Show view title when empty		~
	CANCEL	✓ CREATE
The Views section of the B	Edit Activity page	

7. Click Create.

Add Roles to the Activity

Note that only the Plan Owner role is required in the Portal application.

To add roles to the activity:

- 1. From the Edit Activity page for Risk Response Plans, click Add Roles.
- 2. Search for and select **Risk Team** in the **Roles** field.

Roles		
There are no Roles linked to this Activity		
Risk Team ×		~
	CANCEL	✓ ADD ROLES

The Roles section of the Edit Activity page.

3. Click Add Roles.

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