Create an Application & Activities

Last Modified on 04/22/2020 1:14 pm EDT

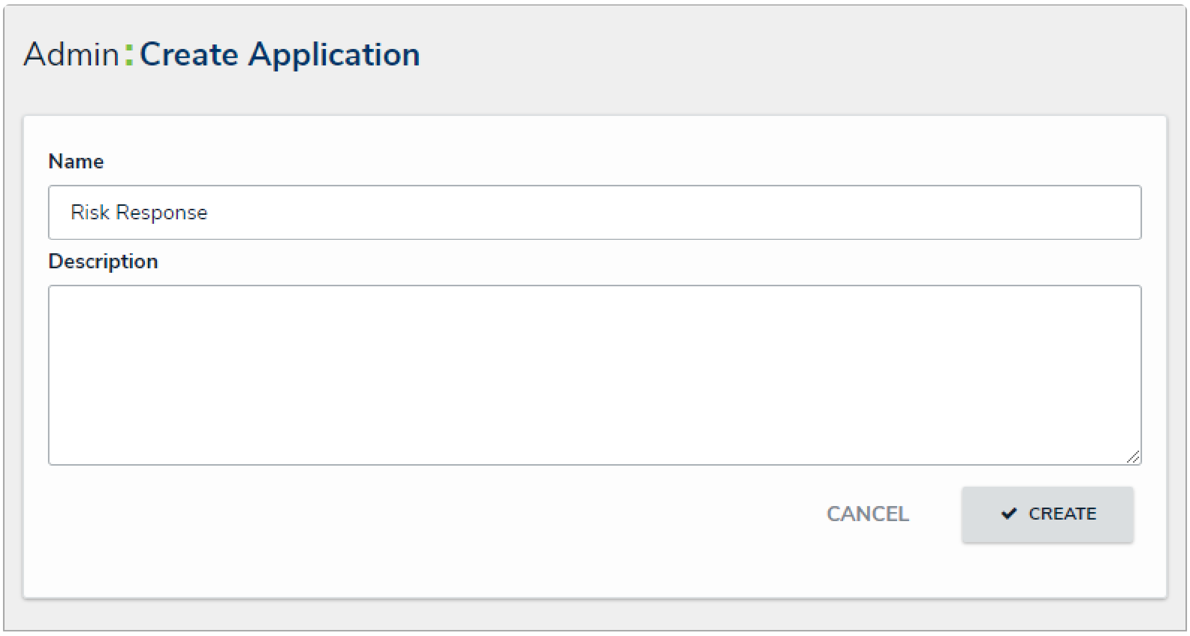
For more detailed information on applications and activities, see the Applications section in the **Resolver Core Administrator's Guide**.

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.

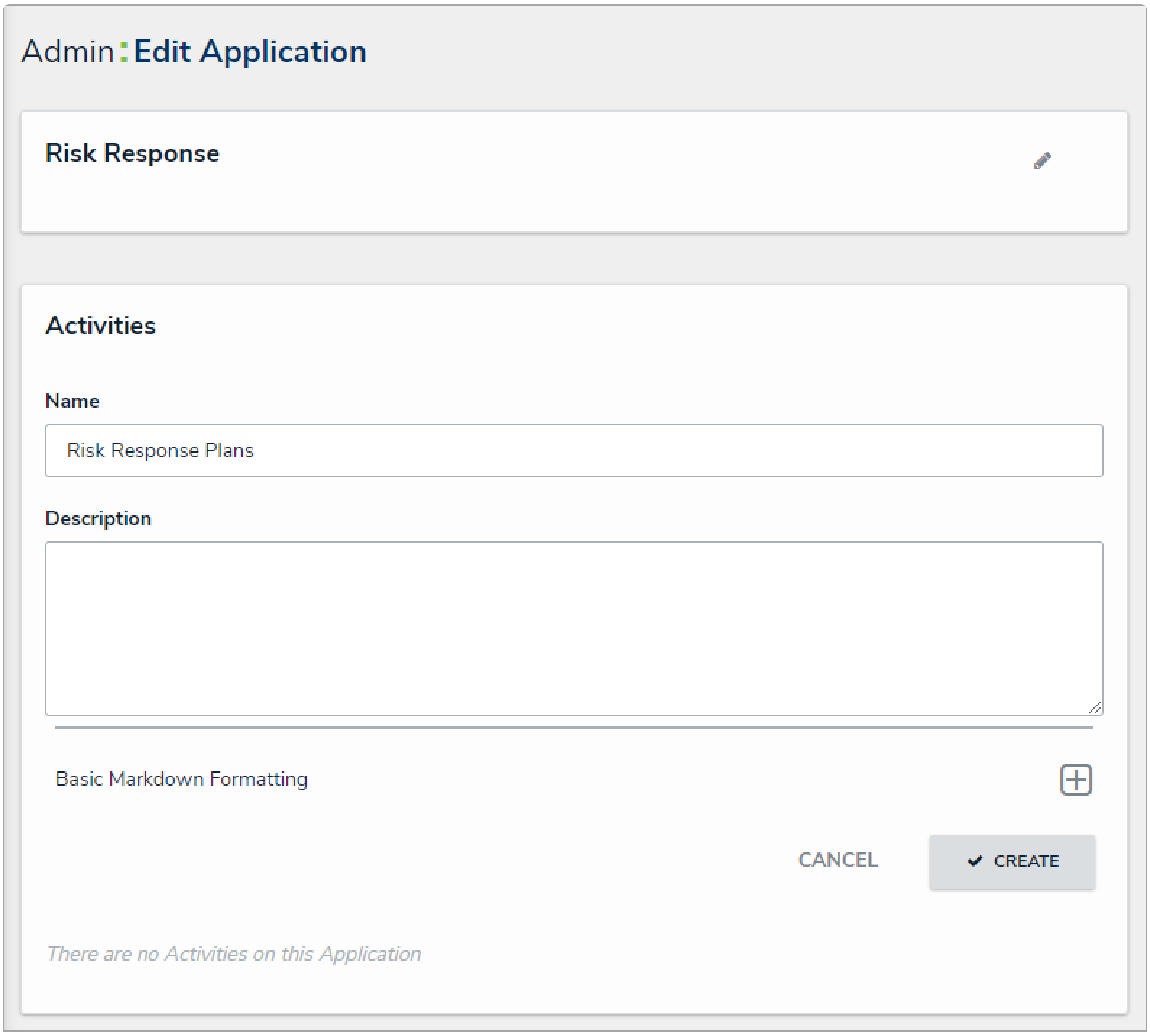
To create an application and activity:

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.



The Create Application page.

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



The Edit Application page.

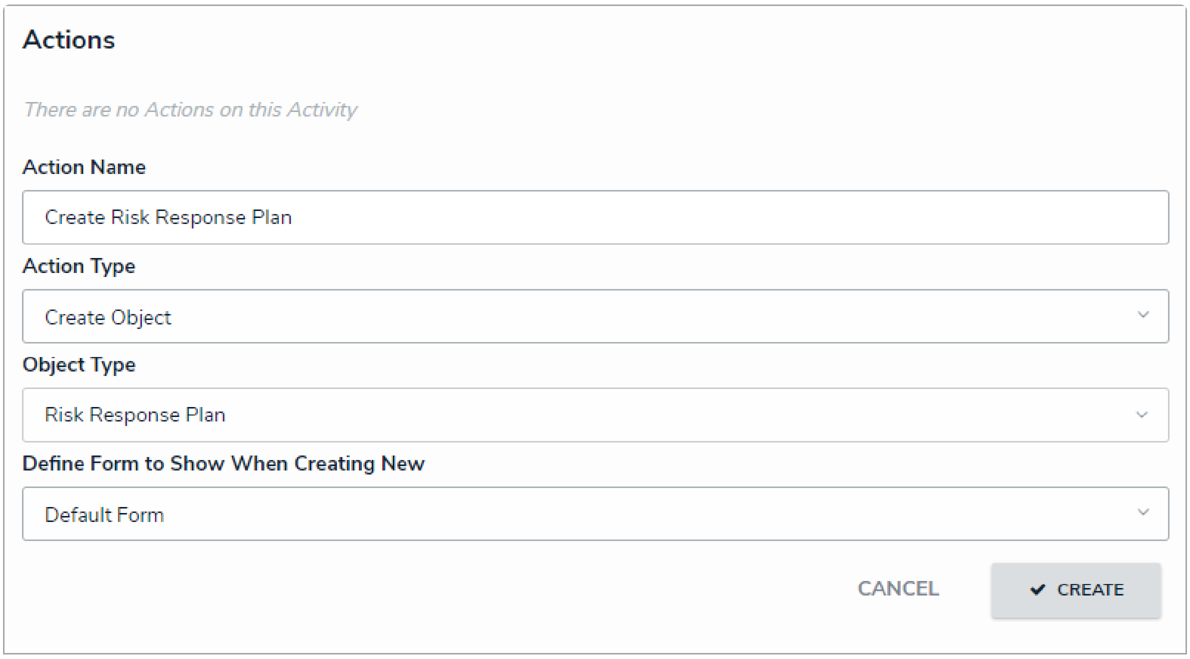
7. Click **Create**.

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.
6. Ensure **Default Form** is selected in the **Define Form to Show When Creating New** dropdown menu.



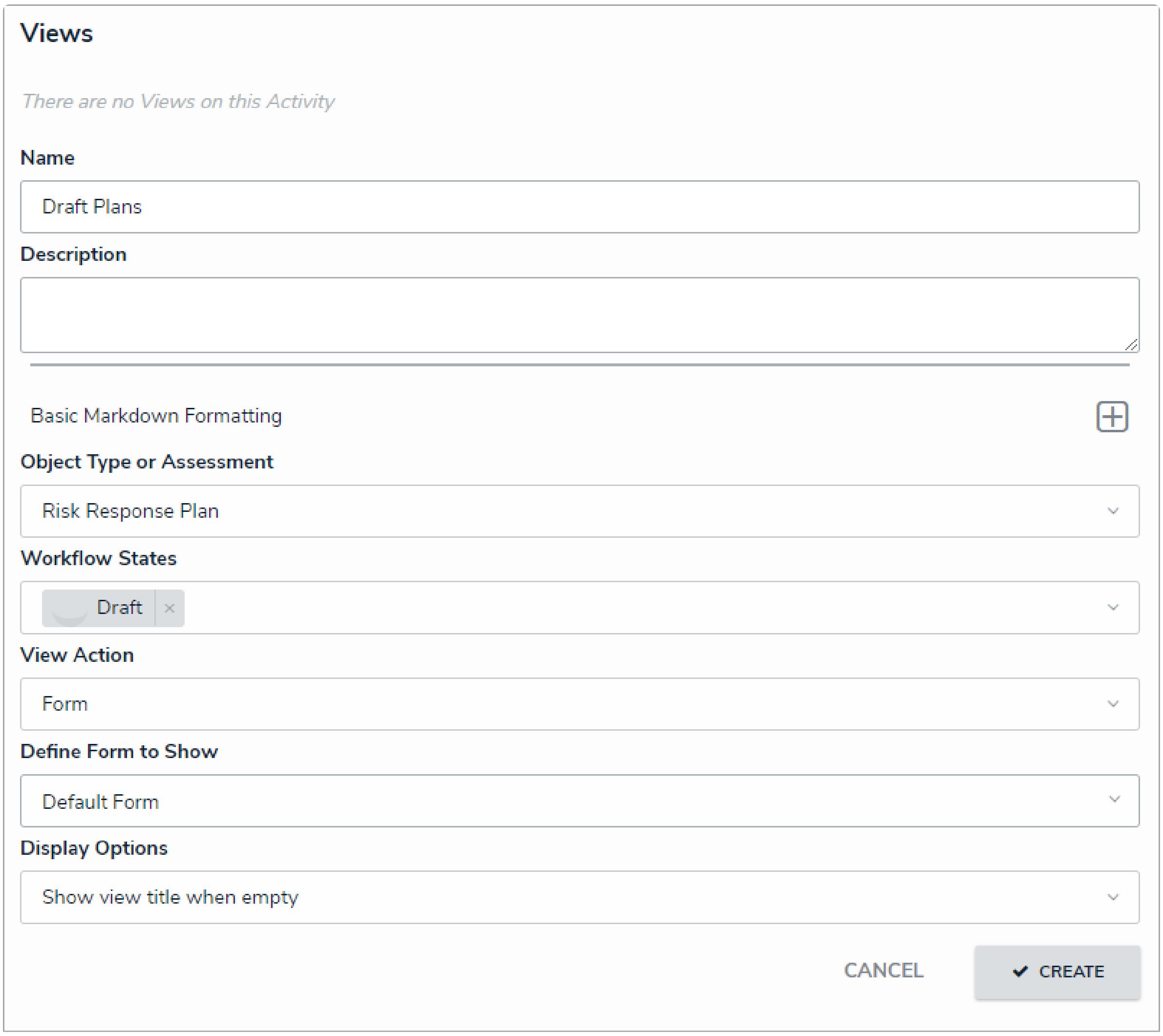
The Actions section of the Edit Activity page.

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.



The Views section of the Edit Activity page.

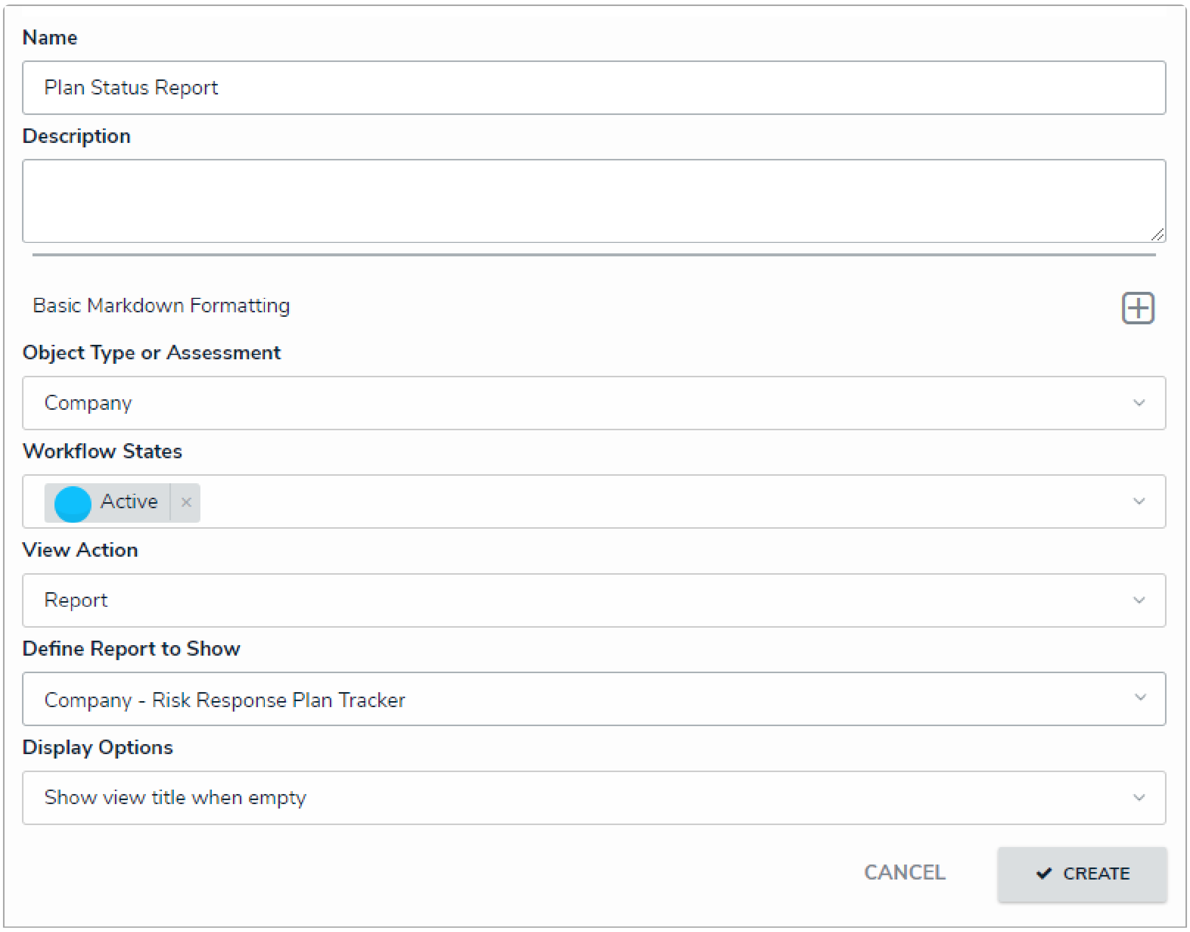
5. Click **Create**.
6. Repeat the above steps to create two equivalent views for the **Active** and **Pending Update** workflow states.

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.
6. Select **Company - Risk Response Plan Tracker** in the **Define Report to Show** dropdown menu.



The Views section of the Edit Activity page.

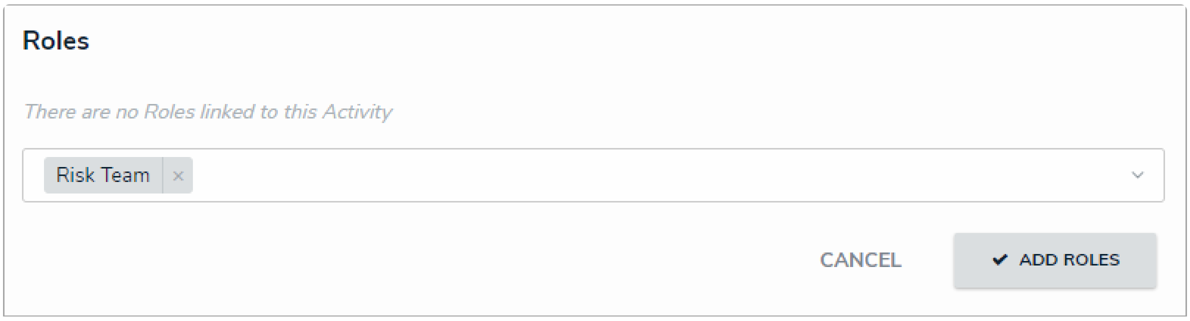
7. Click **Create.**

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.



The Roles section of the Edit Activity page.

3. Click **Add Roles**.

<< Previous   **Next >>**