

# **COVID-19 Information Portlet Configuration Guide**

Individual Risk Management

March 2020

# **RIZING**

# Table of Contents

---

TABLE OF CONTENTS..... 2

OVERVIEW ..... 3

CREATE PICKLISTS ..... 4

CREATE OBJECT DEFINITIONS ..... 9

PERMISSION FOR CUSTOM OBJECTS ..... 22

CREATE CONFIGURATION UI..... 23

PEOPLE PROFILE ..... 29

VALIDATE CONFIGURATION ..... 33

EC ADVANCED REPORT..... 35

EXTRACTING DATA FOR MANUAL REPORT CREATION ..... 40

# Overview

This guide walks through the configuration of a custom MDF portlet that can be used to gather information on an individual's risk due to a specific event such as the 2020 COVID-19 pandemic.

If you do not have the in-house ability to complete the configuration, reach out to your Rizing representative or [hcm@rizing.com](mailto:hcm@rizing.com) and we can help free of charge.

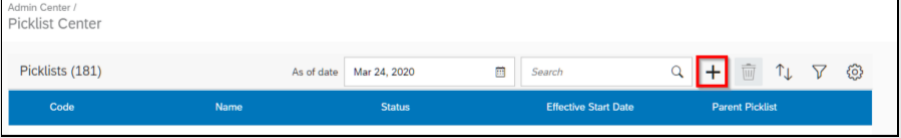
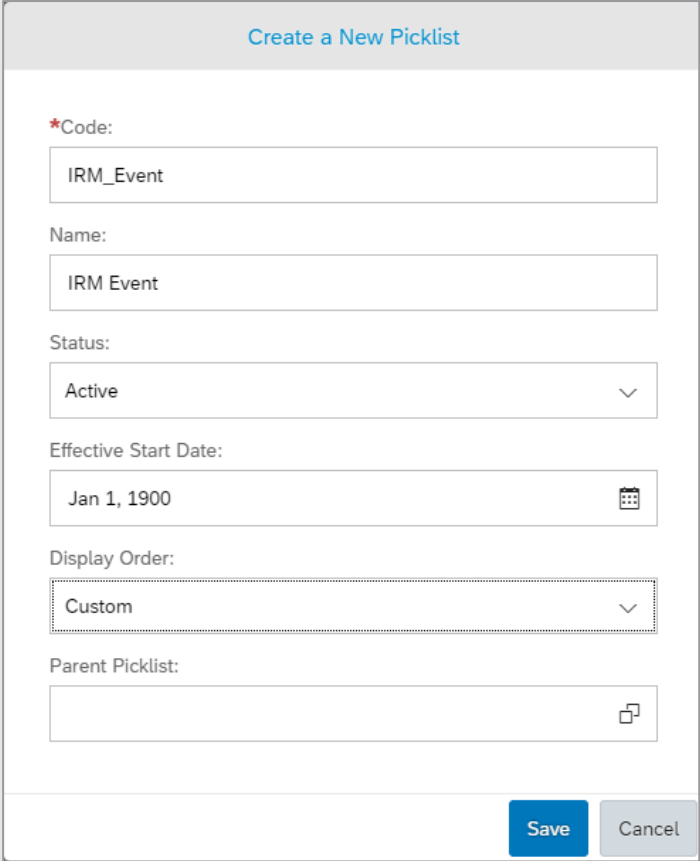
The screenshot shows a user interface for 'Carla Grante' at 'BestRun Company (1710)'. The 'CORONAVIRUS' portlet is active, displaying a 'Risk Assessment' for 'Coronavirus'. The assessment is effective as of Mar 25, 2020. Key details include: Event Type: Pandemic; Event Name: Coronavirus; Risk Status: Imminent Threat; Location of Employee: Local; Has employee been contacted since incident?: Yes; Employee Status: Self-Isolating - No Symptoms; Source of Risk: Other/Unknown; Individual Risk Plan in Place?: Yes. A 'Risk Plan Detail' section shows: Reason for the plan: Employee exposed to suspected case; Risk Plan Start Date: Mar 16, 2020; Risk Plan Review Date: Mar 30, 2020; Risk Plan End Date: Apr 30, 2020; Comments: -; Attachment: -.

COVID-19 Risk Plan ▾

Page 1 of ... < > 1 Go View

Country	Employee ID	First Name	Last Name	Event	Event Type	Event Status	Employee Status
Ireland	100039	Test	Test	Coronavirus	Pandemic	Potential Threat	Self-Isolating - Suspected
Australia	100018	Clark	Kent TEST USER	Coronavirus	Pandemic	Potential Threat	Self-Isolating - Suspected
United States	dddd	Test	Drew	Coronavirus	Pandemic	Potential Threat	Self-Isolating - Suspected

# Create Picklists

Step	Task	Description
1.1	Admin Center > Tools > Picklist Center	
1.2	Create the <b>IRM Event</b> Picklist Click the icon to add a new picklist	
1.3	Enter the information for the Picklist  Code = IRM_Event Name = IRM Event Status = Active Effective Start Date = Jan 1, 1900 Display Order = Custom Parent Picklist = blank  <i>For the remaining picklists, Parent Picklist will be as per the table</i>  Save	

1.4 Click the icon to add Picklist Values

Admin Center / Picklist Center / Versions /

IRM\_Event-t  
Effective Jan 1, 1900

Name: IRM Event      Status: Active  
Code: IRM\_Event-t      Effective Start Date: Jan 1, 1900  
Parent Picklist:      Legacy Picklist ID: IRM\_Event-t  
Display Order: Custom

Picklist Values (0)      Search      **+**

External Code	Label	Status	Parent Picklist Value
No data found. Try adjusting the filter settings.			

1.5 Add Pandemic Values and click the Create button

External Code = IRM\_1  
Label = Pandemic  
Status = Active  
Sort Order = 10

*Parent Picklist will be added for remaining picklists*

\*External Code:

\*Label:

Parent Picklist Value:

Status:

Non-unique External Code:

Sort Order (L Value):

R Value:

Min value:

Max value:

Value:

1.6 Repeat steps 1-6 for each picklist

*Note:*

*The names of the picklists must be as specified here*

*The values in each picklist can be customized*

See **Picklist Values** Chart below

The screenshot shows the 'Admin Center / Picklist Center' interface. It features a search bar with 'irm' entered and a date filter set to 'Mar 24, 2020'. Below the search bar is a table with 7 picklists. Each row includes a radio button, a code, a name, a status, an effective start date, and a parent picklist.

Code	Name	Status	Effective Start Date	Parent Picklist
<input type="radio"/> IRM_Event	IRM Risk Event	Active	Jan 1, 1900	
<input type="radio"/> IRM_Location	IRM Location	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
<input type="radio"/> IRM_Name	IRM Risk Name	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
<input type="radio"/> IRM_RiskPlanReason	IRM Risk Plan Reason	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
<input type="radio"/> IRM_RiskSource	IRM Risk Source	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
<input type="radio"/> IRM_Status	IRM Status	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
<input type="radio"/> IRM_empStatus	IRM Employee Status	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)

## Picklist Values

Code	Name	Status	Effective Start Date	Display Order	Parent Picklist Code
IRM_Event	IRM Risk	ACTIVE	1/1/1900	CUSTOM	
IRM_Location	IRM Location	ACTIVE	1/1/1900	CUSTOM	IRM_Event
IRM_Name	IRM Risk Name	ACTIVE	1/1/1900	CUSTOM	IRM_Event
IRM_RiskPlanReason	IRM Risk Plan Reason	ACTIVE	1/1/1900	CUSTOM	IRM_Event
IRM_RiskSource	IRM Risk Source	ACTIVE	1/1/1900	CUSTOM	IRM_Event
IRM_Status	IRM Status	ACTIVE	1/1/1900	CUSTOM	IRM_Event
IRM_empStatus	IRM Employee Status	ACTIVE	1/1/1900	CUSTOM	IRM_Event


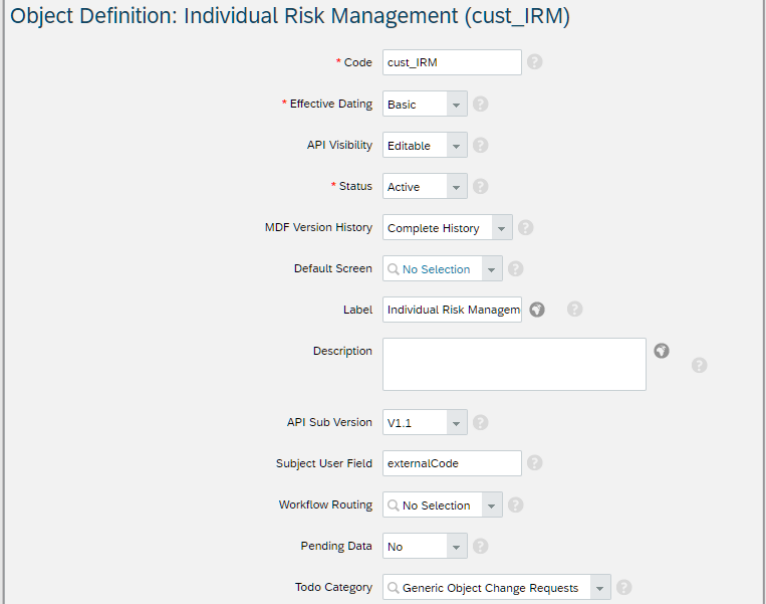
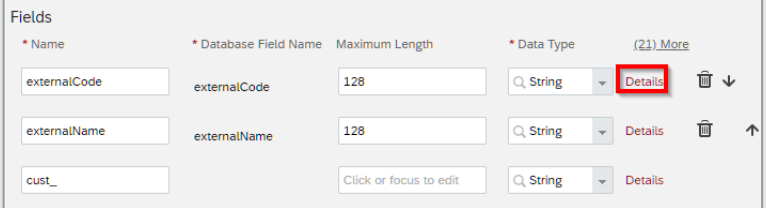
Picklist	External Code	Label	Parent Picklist	Status	Non-unique Code	SortOrder
IRM_Event	IRM_1	Pandemic		ACTIVE	1	10
IRM_Name	COVID-19	Coronavirus	IRM_1	ACTIVE	COVID-19	10
IRM_empStatus	IRM_EMP_1	No Interventions	IRM_1	ACTIVE	1	10

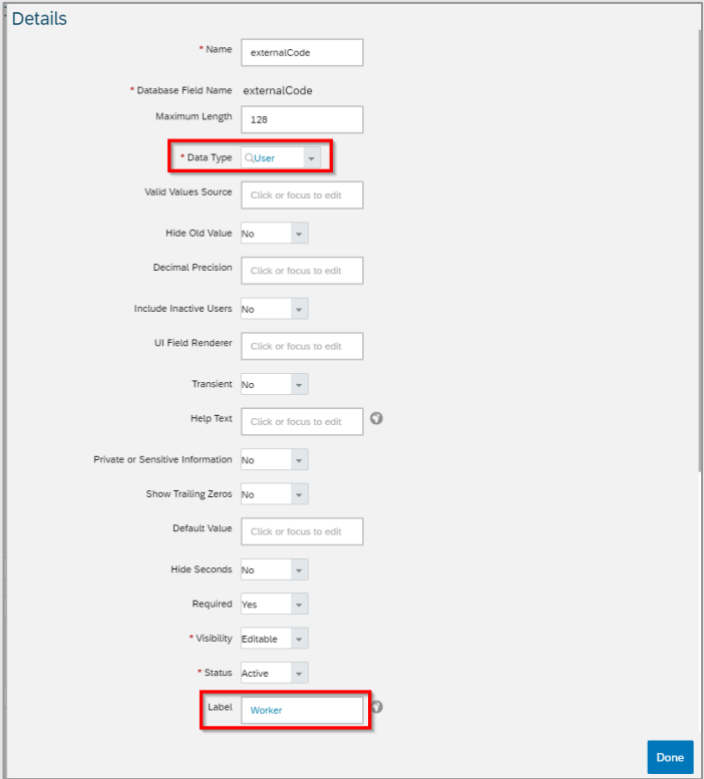
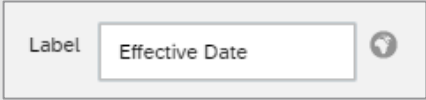
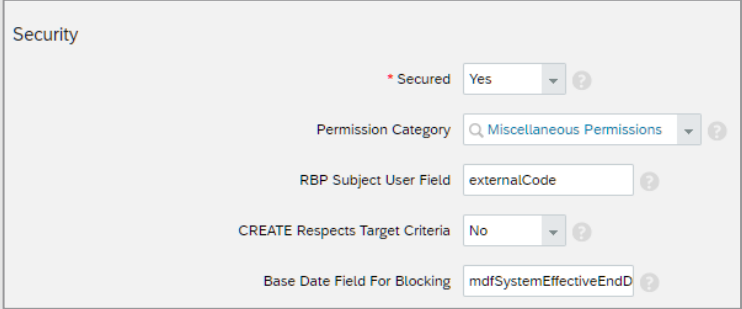

IRM_empStatus	IRM_EMP_2	Self-Isolating - No Symptoms	IRM_1	ACTIVE	2	20
IRM_empStatus	IRM_EMP_3	Self-Isolating - Suspected	IRM_1	ACTIVE	3	30
IRM_empStatus	IRM_EMP_4	Self-Isolating - Confirmed	IRM_1	ACTIVE	4	40
IRM_empStatus	IRM_EMP_5	Hospitalized - Suspected	IRM_1	ACTIVE	5	50
IRM_empStatus	IRM_EMP_6	Hospitalized - Confirmed	IRM_1	ACTIVE	6	60
IRM_empStatus	IRM_EMP_7	Recovered	IRM_1	ACTIVE	7	70
IRM_empStatus	IRM_EMP_8	Death	IRM_1	ACTIVE	8	80
IRM_Location	IRM_Loc_1	Local	IRM_1	ACTIVE	1	10
IRM_Location	IRM_Loc_2	International Personal Travel	IRM_1	ACTIVE	2	20
IRM_Location	IRM_Loc_3	International Business Travel	IRM_1	ACTIVE	3	30
IRM_Location	IRM_Loc_4	Domestic Personal Travel	IRM_1	ACTIVE	4	40
IRM_Location	IRM_Loc_5	Domestic Business Travel	IRM_1	ACTIVE	5	50
IRM_Location	IRM_Loc_6	Requires Evacuation	IRM_1	ACTIVE	6	60
IRM_RiskPlanReason	IRM_RPR_1	Employee exposed to confirmed case	IRM_1	ACTIVE	1	10
IRM_RiskPlanReason	IRM_RPR_2	Employee exposed to suspected case	IRM_1	ACTIVE	2	20
IRM_RiskPlanReason	IRM_RPR_3	Employee in an At-Risk category	IRM_1	ACTIVE	3	30
IRM_RiskPlanReason	IRM_RPR_4	Employee subjected to mandated social distancing	IRM_1	ACTIVE	4	40
IRM_RiskPlanReason	IRM_RPR_5	Other	IRM_1	ACTIVE	5	50

IRM_RiskSource	IRM_RC_1	Family / Friend	IRM_1	ACTIVE	1	10
IRM_RiskSource	IRM_RC_2	Colleague	IRM_1	ACTIVE	2	20
IRM_RiskSource	IRM_RC_3	Customer	IRM_1	ACTIVE	3	30
IRM_RiskSource	IRM_RC_4	Other/Unknown	IRM_1	ACTIVE	4	40
IRM_Status	IRM_Status_1	Imminent Threat	IRM_1	ACTIVE	1	10
IRM_Status	IRM_Status_2	Potential Threat	IRM_1	ACTIVE	2	20
IRM_Status	IRM_Status_3	Active Threat	IRM_1	ACTIVE	3	30
IRM_Status	IRM_Status_4	Threat Resolved	IRM_1	ACTIVE	4	50



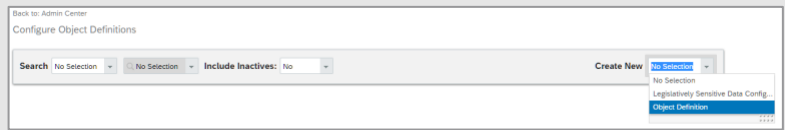
# Create Object Definitions

Step	Task	Description																				
2.1	Admin Center > Tools > Configure Object Definition Create New <b>Object Definition</b>																					
2.2	Code = cust_IRM Effective Dating = Basic API Visibility = Editable Label = Individual Risk Management To Do Category = Generic Object Change Requests  <i>If you receive warning messages when changing the Effective Dating, click Yes</i>																					
2.3	Under <b>Fields</b> , click the Details link next to externalCode	 <table border="1"> <thead> <tr> <th>Name</th> <th>Database Field Name</th> <th>Maximum Length</th> <th>Data Type</th> <th>(21) More</th> </tr> </thead> <tbody> <tr> <td>externalCode</td> <td>externalCode</td> <td>128</td> <td>String</td> <td>Details</td> </tr> <tr> <td>externalName</td> <td>externalName</td> <td>128</td> <td>String</td> <td>Details</td> </tr> <tr> <td>cust_</td> <td>Click or focus to edit</td> <td></td> <td>String</td> <td>Details</td> </tr> </tbody> </table>	Name	Database Field Name	Maximum Length	Data Type	(21) More	externalCode	externalCode	128	String	Details	externalName	externalName	128	String	Details	cust_	Click or focus to edit		String	Details
Name	Database Field Name	Maximum Length	Data Type	(21) More																		
externalCode	externalCode	128	String	Details																		
externalName	externalName	128	String	Details																		
cust_	Click or focus to edit		String	Details																		

<p>2.4</p>	<p>Data Type = User Label = "Worker"</p> <p>Leave remaining fields as default</p> <p>Click Done</p>	
<p>2.5</p>	<p>Under <b>Fields</b>, click the Details link next to effectiveStartDate</p> <p>Label = Effective Date</p> <p>Leave remaining fields as default</p> <p>Click Done</p>	
<p>2.6</p>	<p>Under <b>Security</b> set: Secured = Yes Permission Category = "Miscellaneous Permissions"</p>	
<p>2.7</p>	<p>Click Save</p> <p><i>You will grant role-based permission in a later step</i></p>	

2.8

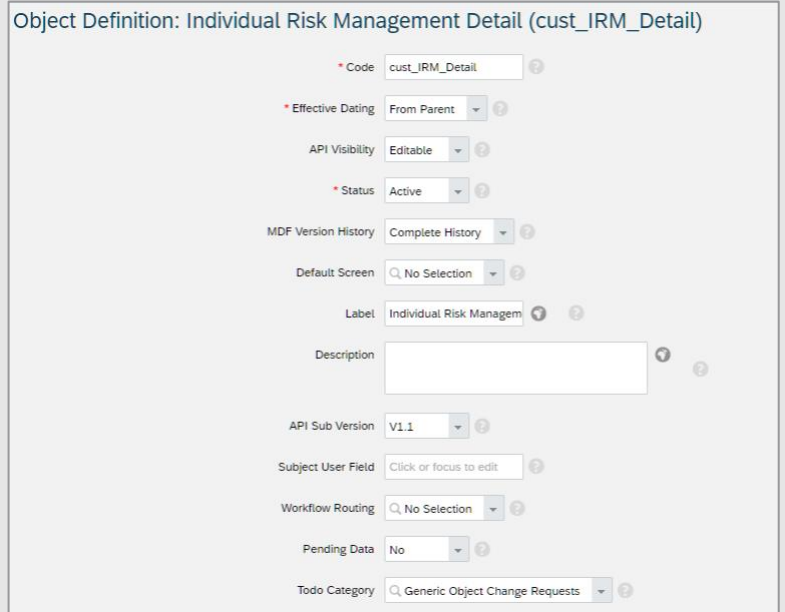
Admin Center > Tools >  
Configure Object Definition  
Create New Object Definition



2.9

1. Code = cust\_IRM\_Detail
2. Effective Dating = From Parent
3. API Visibility = Editable
4. Label = Individual Risk Management Detail
5. To Do Category = Generic Object Change Requests

*If you receive warning messages when changing the Effective Dating, click Yes*



2.10

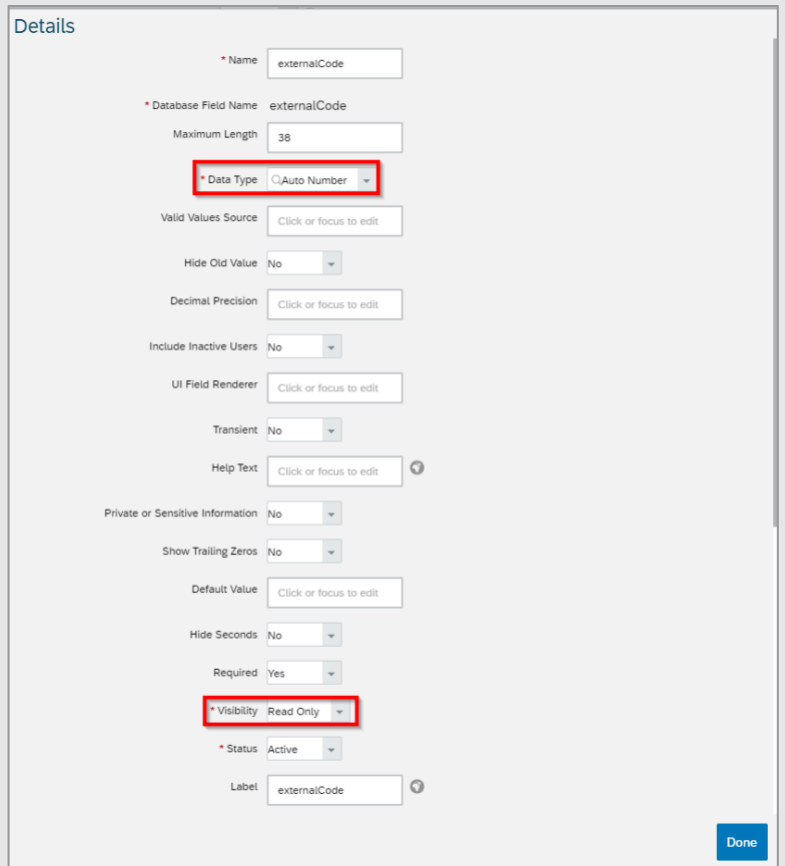
Under **Fields**, click the Details link next to **externalCode**

Data Type = Auto Number

Visibility = Read Only

Leave remaining fields as default

Click Done



2.11

Under **Fields**, click the Details link next to **externalName**

Data Type = Picklist

Valid Values Source = IRM\_Event

UI Field Renderer = displayPickListWithoutExternalCode

Required = Yes

Visibility = Editable

Label = Risk Event

Leave remaining fields as default

Click Done

Details

\* Name externalName

\* Database Field Name externalName

Maximum Length 38

\* Data Type  Picklist

Valid Values Source IRM\_Event

Hide Old Value No

Decimal Precision Click or focus to edit

Include Inactive Users No

UI Field Renderer displayPickListWithoutExternalCode

Transient No

Help Text Click or focus to edit

Private or Sensitive Information No

Show Trailing Zeros No

Default Value Click or focus to edit

Hide Seconds No

Required Yes

\* Visibility Editable

\* Status Active

Label Risk Event

Done

2.12

The next steps will add new fields by clicking Details in the next available "cust\_" field

* Name	* Database Field Name	Maximum Length	* Data Type	(2) More
externalCode	externalCode	128	String	Details
externalName	externalName	128	String	Details
cust_		Click or focus to edit	String	Details

Create the **Event Name** field

Name = cust\_Name

Data Type = Picklist

Valid Values Source =  
IRM\_Name

2.13 UI Field Renderer =  
displayPickListWithoutExternalCode

Visibility = Editable

Label = Name

Click Done

Details

\* Name

\* Database Field Name sfFields.sfField1

Maximum Length

\* Data Type  Picklist

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility

\* Status

Label

Done

Create the **Status** field

Name = cust\_status

Data Type = Picklist

Valid Values Source =  
IRM\_Status

2.14 UI Field Renderer =  
displayPickListWithoutExternalCode

Visibility = Editable

Label = Risk Status

Click Done

Details

\* Name

\* Database Field Name sfFields.sfField2

Maximum Length

\* Data Type  Picklist

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility

\* Status

Label

Done

2.15

Create the **Location** field

Name = cust\_location

Data Type = Picklist

Valid Values Source =  
IRM\_Location

UI Field Renderer =  
displayPickListWithoutExternalCode

Visibility = Editable

Label = Location of Employee

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_location'. The field is of type 'Picklist' and is linked to the 'IRM\_Location' valid values source. The UI Field Renderer is set to 'displayPickListWithoutExternalCode'. The field is visible and editable. The label is 'Location of Employee'. A 'Done' button is located at the bottom right.

Details

Name:

Database Field Name: sfFields.sfField3

Maximum Length:

Data Type:  Picklist

Valid Values Source:

Hide Old Value:

Decimal Precision:

Include Inactive Users:

UI Field Renderer:

Transient:

Help Text:

Private or Sensitive Information:

Show Trailing Zeros:

Default Value:

Hide Seconds:

Required:

Visibility:

Status:

Label:

Done

2.16

Create the **Has Employee  
been contacted** field

Name = cust\_contacted

Data Type = Boolean

Visibility = Editable

Label = Has employee been  
contacted?

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_contacted'. The field is of type 'Boolean' and has a valid values source of 'yesNo'. The field is visible and editable. The label is 'Has employee been contacted?'. A 'Done' button is located at the bottom right.

Details

Name:

Database Field Name: sfFields.sfField6

Maximum Length:

Data Type:  Boolean

Valid Values Source:

Hide Old Value:

Decimal Precision:

Include Inactive Users:

UI Field Renderer:

Transient:

Help Text:

Private or Sensitive Information:

Show Trailing Zeros:

Default Value:

Hide Seconds:

Required:

Visibility:

Status:

Label:

Done

2.17

Create the **Employee Status** field

Name = cust\_empStatus

Data Type = Picklist

Valid Values Source = IRM\_empStatus

UI Field Renderer = displayPickListWithoutExternalCode

Visibility = Editable

Label = Employee Status

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_empStatus'. The field is associated with the database field 'sfFields.sfField4' and has a maximum length of 38. The data type is set to 'Picklist', and the valid values source is 'IRM\_empStatus'. The UI field renderer is 'displayPickListWithoutExternalCode'. The visibility is set to 'Editable', and the label is 'Employee Status'. Other settings include 'Hide Old Value' set to 'No', 'Decimal Precision' set to 'Click or focus to edit', 'Include Inactive Users' set to 'No', 'Transient' set to 'No', 'Help Text' set to 'Click or focus to edit', 'Private or Sensitive Information' set to 'No', 'Show Trailing Zeros' set to 'No', 'Default Value' set to 'Click or focus to edit', 'Hide Seconds' set to 'No', 'Required' set to 'No', and 'Status' set to 'Active'. A 'Done' button is located at the bottom right.

2.18

Create the **Individual Risk Plan in Place** field

Name = cust\_riskPlan

Data Type = Boolean

Visibility = Editable

Label = Individual Risk Plan in place?

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_riskPlan'. The field is associated with the database field 'sfFields.sfField5' and has a maximum length of 5. The data type is set to 'Boolean', and the valid values source is 'yesNo'. The UI field renderer is set to 'Click or focus to edit'. The visibility is set to 'Editable', and the label is 'Individual Risk Plan in Place?'. Other settings include 'Hide Old Value' set to 'No', 'Decimal Precision' set to 'Click or focus to edit', 'Include Inactive Users' set to 'No', 'Transient' set to 'No', 'Help Text' set to 'Click or focus to edit', 'Private or Sensitive Information' set to 'No', 'Show Trailing Zeros' set to 'No', 'Default Value' set to 'Click or focus to edit', 'Hide Seconds' set to 'No', 'Required' set to 'No', and 'Status' set to 'Active'. A 'Done' button is located at the bottom right.

2.19

Create the **Risk Plan Reason** field

Name = cust\_riskPlanReason

Data Type = Picklist

Valid Values Source =  
IRM\_RiskPlanReason

UI Field Renderer =  
displayPickListWithoutExternalCode

Visibility = Editable

Label = Reason for the plan

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_riskPlanReason'. The field is a Picklist type with a maximum length of 38. The valid values source is 'IRM\_RiskPlanReason'. The UI Field Renderer is set to 'displayPickListWithoutExternalCode'. The field is visible and editable, with a label 'Reason for the plan'. The status is 'Active'.

2.20

Create the **Risk Source** field

Name = cust\_riskSource

Data Type = Picklist

Valid Values Source =  
IRM\_RiskSource

UI Field Renderer =  
displayPickListWithoutExternalCode

Visibility = Editable

Label = Risk Source

Click Done

The screenshot shows the 'Details' configuration page for a field named 'cust\_riskSource'. The field is a Picklist type with a maximum length of 38. The valid values source is 'IRM\_RiskSource'. The UI Field Renderer is set to 'displayPickListWithoutExternalCode'. The field is visible and editable, with a label 'Risk Source'. The status is 'Active'.



Create the **Risk Plan Start Date** field

2.21

Name = cust\_riskPlanStart

Data Type = Date

Visibility = Editable

Label = Risk Plan Start Date

Details

\* Name

\* Database Field Name sfFields.sfField8

Maximum Length

\* Data Type

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility

\* Status

Label

Done

Create the **Risk Plan Review Date** field

2.22

Name = cust\_riskPlanReview

Data Type = Date

Visibility = Editable

Label = Risk Plan Review Date

Details

\* Name

\* Database Field Name sfFields.sfField9

Maximum Length

\* Data Type

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility

\* Status

Label

Done

Create the **Risk Plan End Date** field

2.23

Name = cust\_riskPlanEnd

Data Type = Date

Visibility = Editable

Label = Risk Plan End Date

Details

Name

\* Database Field Name sfFields.sfField10

Maximum Length

\* Data Type  Date

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility  Editable

\* Status

Label

Done

Create the **Comments** field

2.24

Name = cust\_Comments

Maximum Length = 400

Data Type = String

Visibility = Editable

Label = Comments

Click Done

Details

\* Name

\* Database Field Name sfFields.sfField11

Maximum Length

\* Data Type  String

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

\* Visibility  Editable

\* Status

Label

Done

2.25 Create the **Attachments** field

Name = cust\_attachment  
 Data Type = Attachment  
 Visibility = Editable  
 Label = Attachment

Details

\* Name

\* Database Field Name sfFields.sfField12

Maximum Length

\* Data Type

Valid Values Source

Hide Old Value

Decimal Precision

Include Inactive Users

UI Field Renderer

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

Visibility

\* Status

Label

Done

2.26 Under **Security** set:

Secured = Yes  
 Permission Category = "Miscellaneous Permissions"

Security

\* Secured

Permission Category

RBP Subject User Field

CREATE Respects Target Criteria

Base Date Field For Blocking

2.27 Click Save

2.28 Create Business Rule

Admin Center > Tools > Configure Business Rules

Click the icon to create a new rule

Admin Center / Business Rules Admin

\*As Of Date:  Scenario:

Last Modified By:  Rule Type:  Base Object:

Adapt Filters

Business Rules (95)

Support

Under **Metadata Framework**, select **Rules for MDF Based Objects**

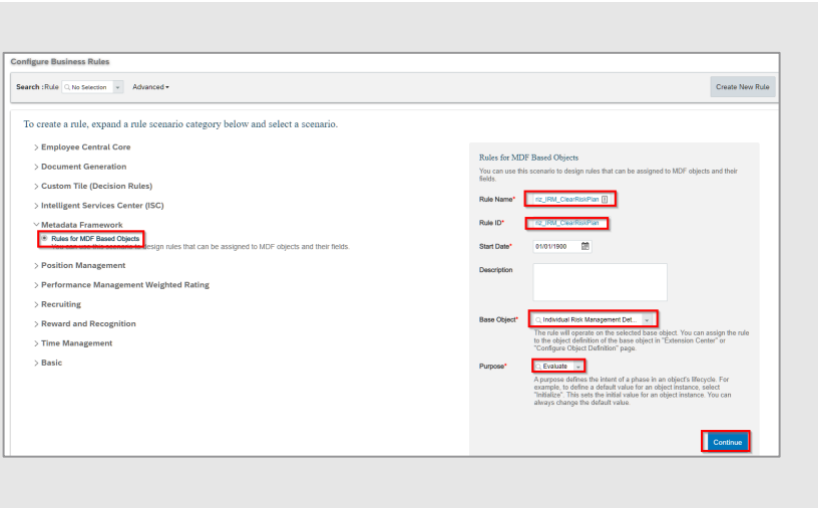
Rule Name = riz\_IRM\_ClearRiskPlan

Rule Id = riz\_IRM\_ClearRiskPlan

Base Object = Individual Risk Management Detail

Purpose = Evaluate

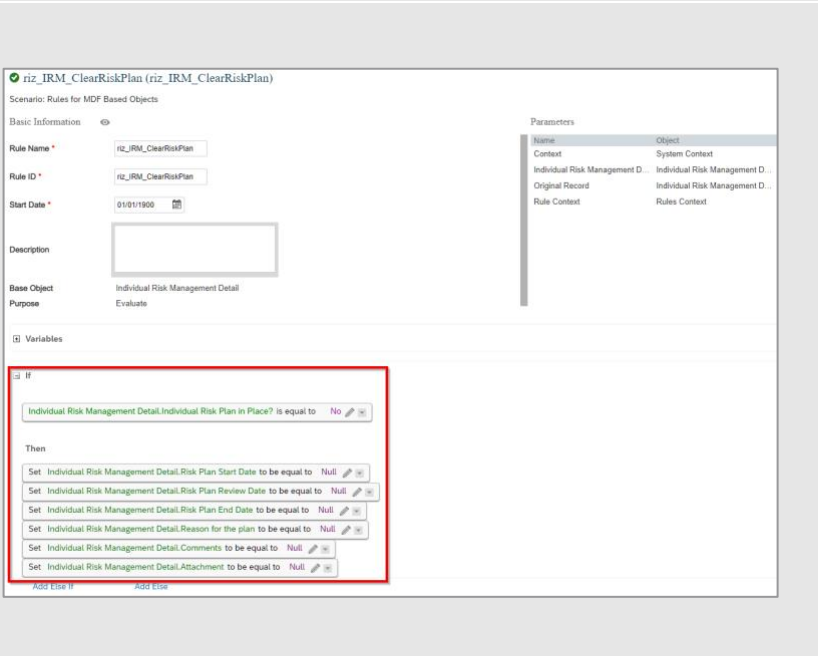
Click Continue



Build the IF and THEN statements as per the screen shot

Save the rule

*Note: to get to the statement, click the dropdown and select Edit > Set*

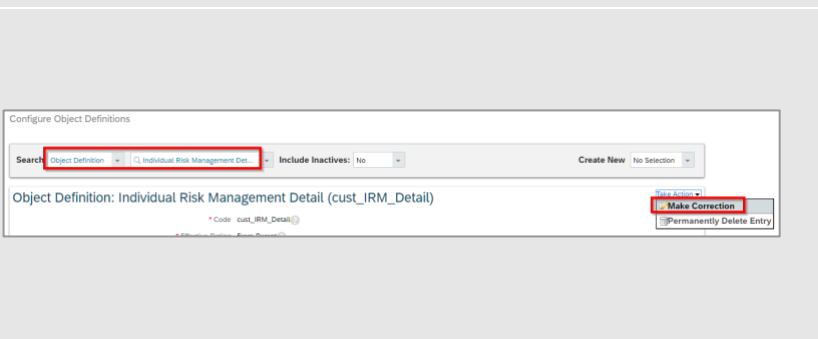


Admin Center > Tools > Configure Object Definition

Search = Object Definition

Individual Risk Management Detail

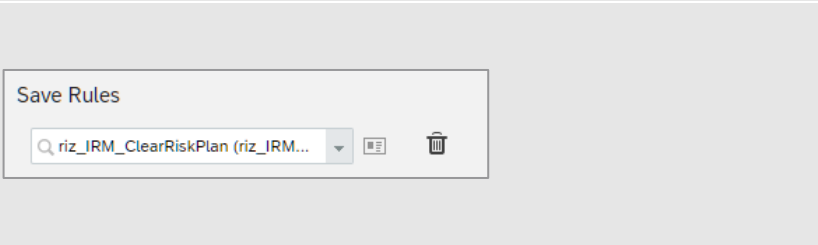
Take Action > Make Correction



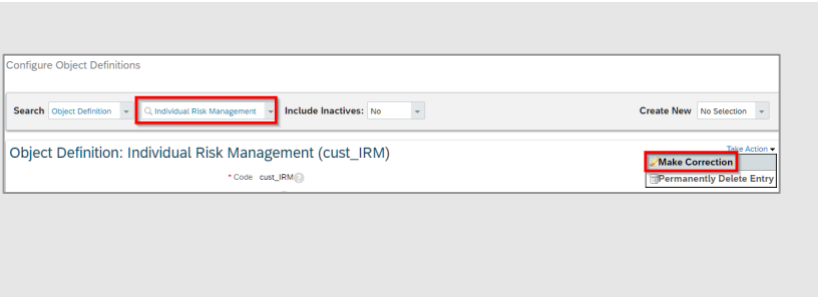
Under **Save Rules** add rule riz\_ClearRiskPlan

Save the object

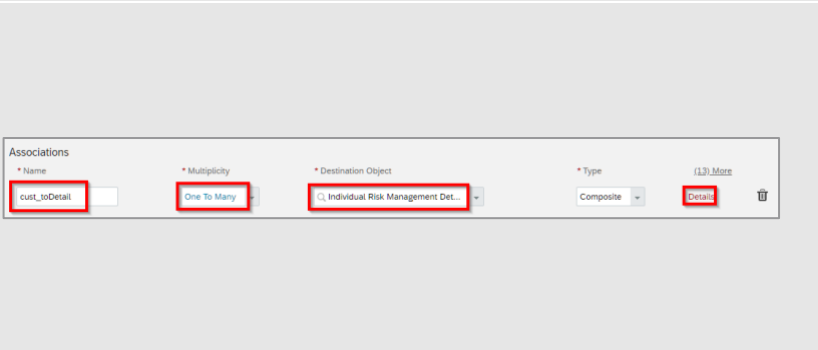
*You will grant role-based permission in a later step*



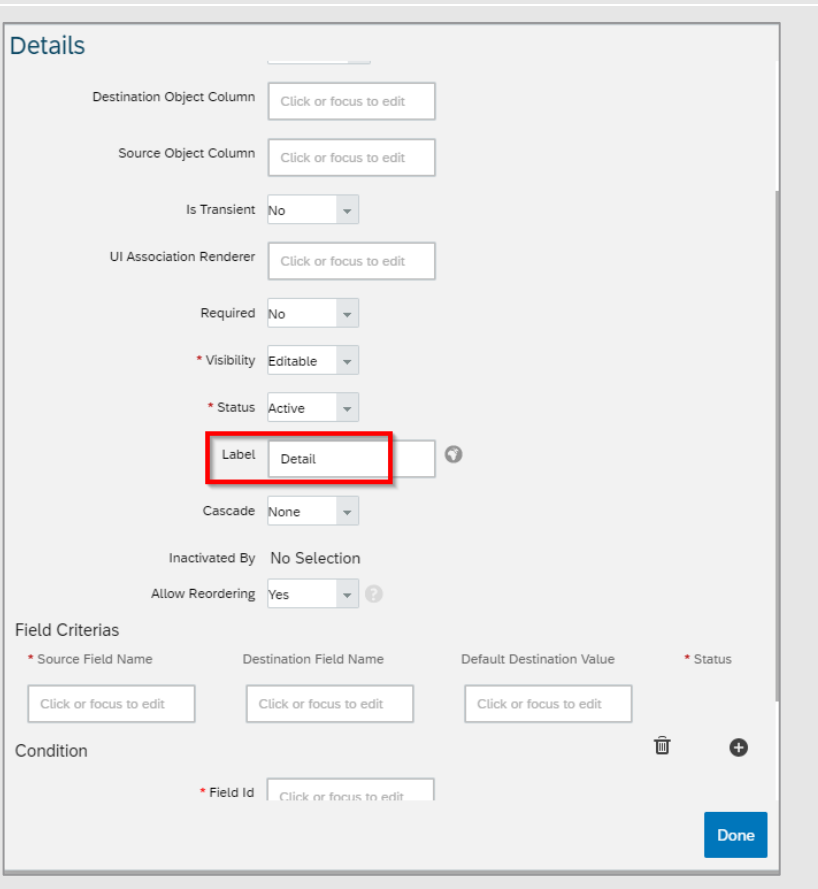
2.33 Admin Center > Tools > Configure Object Definition  
 Search = Object Definition  
 Individual Risk Management  
 Take Action > Make Correction



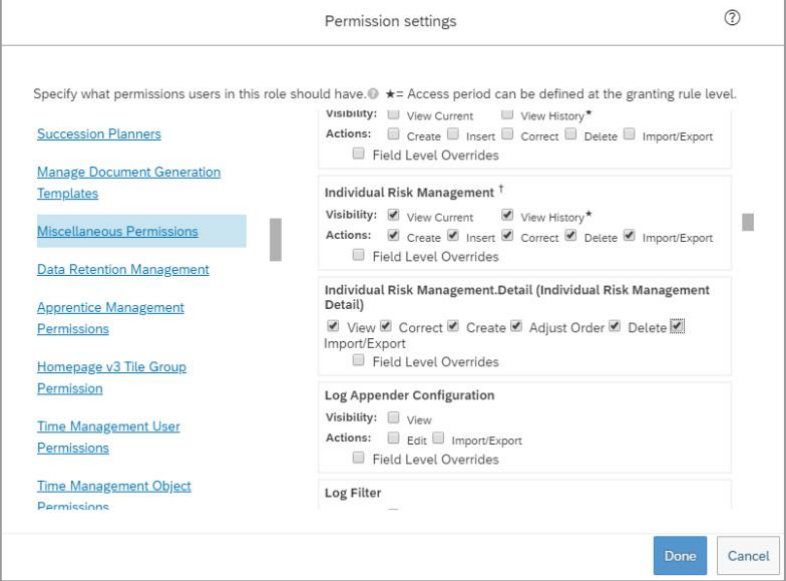
2.34 Scroll down to the Associations section  
 Name = cust\_toDetail  
 Multiplicity = One to Many  
 Destination Object = "Individual Risk Management Detail"  
 Click Details link




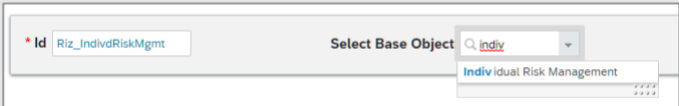
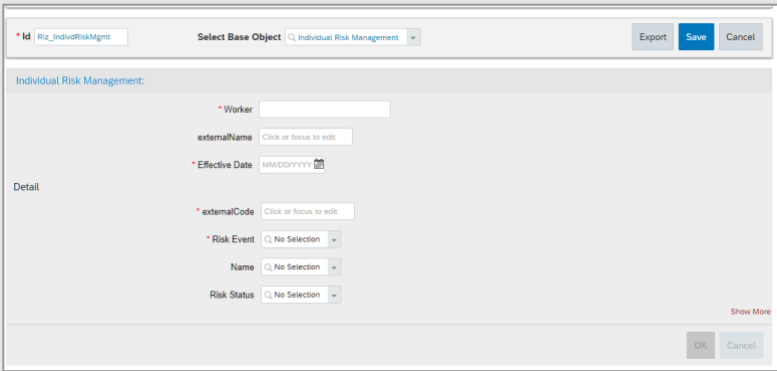
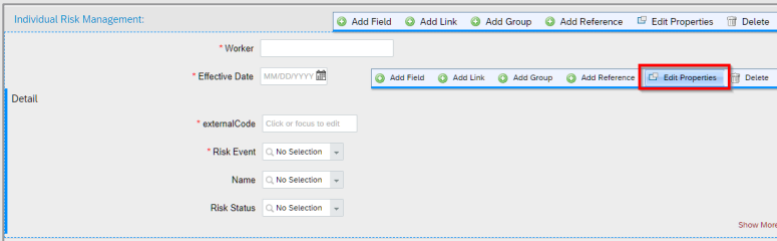
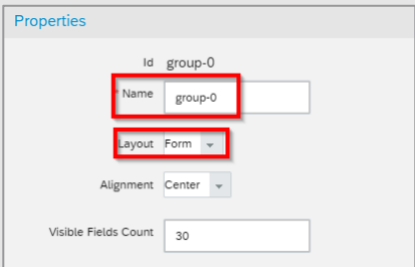
2.35 Set Label = "Detail"  
 Click Done  
 Save the Object

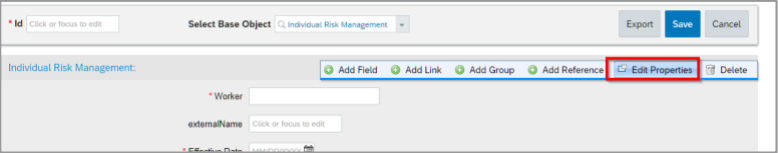
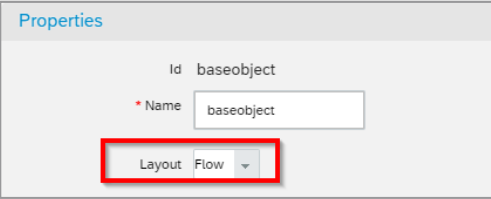
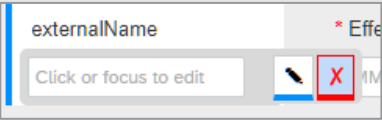
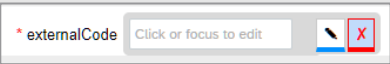
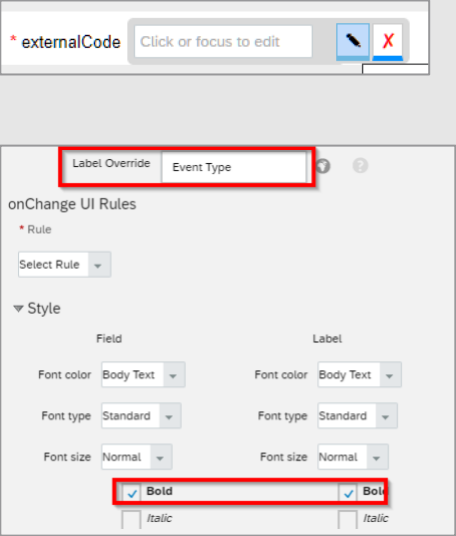


# Permission for Custom Objects

Step	Task	Description
3.1	<p>Admin Center &gt; Tools &gt; Manage Permission Role</p> <p>Select super admin role (or role responsible for maintaining portlet)</p> <p>Open Permission role and click “Permission”</p> <p>In “Miscellaneous Permissions” check appropriate permissions for the objects:</p> <p>Individual Risk Management</p> <ul style="list-style-type: none"> <li>• View Current</li> <li>• View History</li> <li>• Create</li> <li>• Insert</li> <li>• Correct</li> <li>• Delete</li> <li>• Import/Export</li> </ul> <p>Individual Risk Management Detail</p> <ul style="list-style-type: none"> <li>• View</li> <li>• Correct</li> <li>• Create</li> <li>• Adjust Order</li> <li>• Delete</li> </ul> <p>Click “Done”</p> <p>Click “Save Changes”</p>	

# Create Configuration UI

Step	Task	Description
4.1	Admin Center > Tools > Manage Configuration UI  Create New	
4.2	Id = Riz_IndividRiskMgmt  Select base object = Individual Risk Management	
4.3	Object opens	
4.4	Hover over the Details section and click "Edit Properties"  <i>Note, you will see a second menu bar</i>	
4.5	Set properties:  Layout = Form  Visible Fields Count = 30  Click OK	

4.6	Click "Edit Properties" on the main form menu (top right of form)	
4.7	Select Layout = flow  Click ok	
4.8	Hover over the externalName field Click the X to remove the field	
4.9	Hover over the externalCode field Click the X to remove the field	
4.10	Hover over the Risk Event field and click the edit icon  Set the Label Override to "Event Type"  Set the Style for Field and Label to Bold  Click OK	



4.11

Hover over the Name field and click the edit icon

Set Required = Yes

Set the Label Override to "Event Name"

Set the Style for Field and Label to Bold

Click OK

4.12

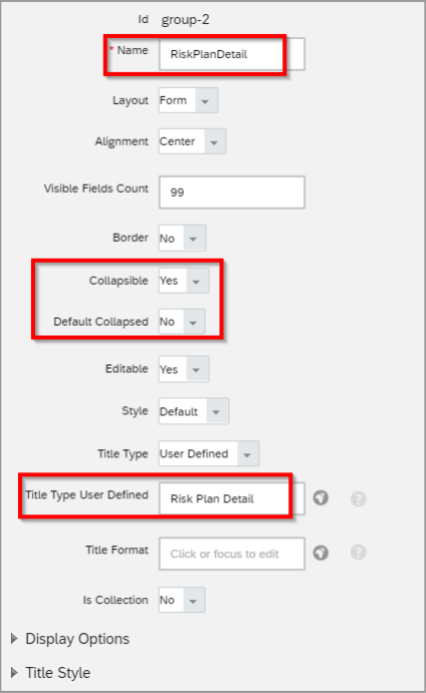
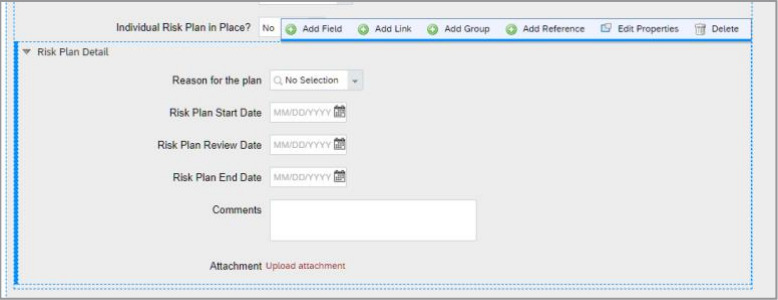
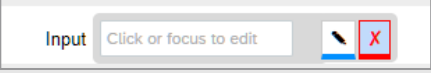
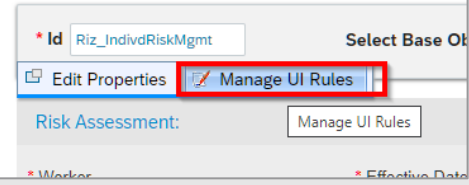

Hover over the Detail section and click "Add Group"

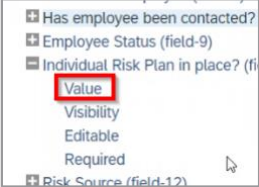
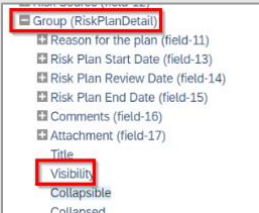
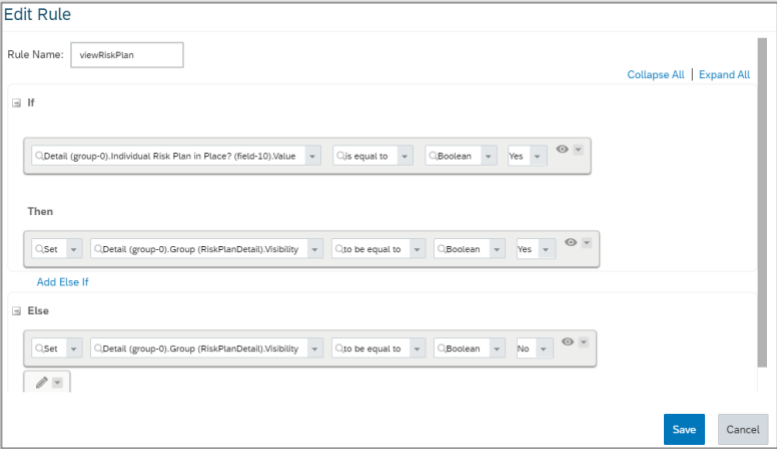

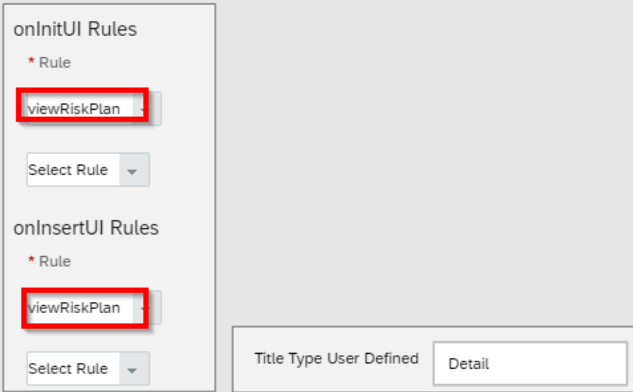
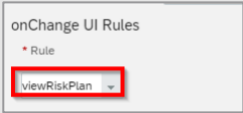
*Note: make sure you select the menu in the Details area*

4.13

Hover over the new Group and click "Edit Properties"

*Note, you will see a new menu bar in the Title Section*

<p>4.14</p>	<p>Name = "RiskPlanDetail"</p> <p>Collapsible = Yes</p> <p>Default Collapsed = No</p> <p>Title Type User Defined = Risk Plan Detail</p> <p>Click Ok</p>	
<p>4.15</p>	<p>Click on each field and drag into the new "Risk Plan Detail" group</p> <p>Reason for the plan</p> <p>Risk Plan Start Date</p> <p>Risk Plan Review Date</p> <p>Risk Plan End Date</p> <p>Comments</p> <p>Attachment</p>	
<p>4.16</p>	<p>Hover over the "input" field and delete</p>	
<p>4.17</p>	<p>Hover over the header on top left of form and select "Manage UI Rules"</p>	
<p>4.18</p>	<p>Click Add Rule</p>	

<p>4.19</p>	<p>Enter rule logic and save</p> <p>Close the UI Rules window</p> <p><i>Note, drill to the field value:</i></p>  	 <p><i>Note, if the rule does not save, change the Else Boolean to Yes and Save. Then, edit the rule and the value back to No and Save.</i></p>
<p>4.20</p>	<p>Hover over the header on top left of form and select "Edit Properties"</p>	
<p>4.21</p>	<p>Add new rule to onInitUI Rules and onInsertUI Rules</p> <p>Clear the Title Type User Defined field</p> <p>Click OK</p>	
<p>4.22</p>	<p>Hover over Individual Risk Plan in Place and click the edit icon</p> <p>Set the OnChange UI Rule</p> <p>Click OK</p>	

4.23

Click Save

The screenshot shows a configuration form for 'Individual Risk Management'. At the top right, there are buttons for 'Delete', 'Export', 'Save' (highlighted in red), and 'Cancel'. Below this is a 'Risk Assessment' section with various dropdown menus and checkboxes. At the bottom, there is a 'Risk Plan Detail' section with date pickers and a comments field.

4.24

Admin Center > Tools > Configuration Object Definition

Search Object Definition > Individual Risk Management

Take Action > Make Correction

The screenshot shows the 'Configure Object Definitions' page. A search bar contains 'Individual Risk Management'. Below the search bar, the object definition 'Individual Risk Management (cust\_IRM)' is displayed. To the right of the object name, there are two buttons: 'Make Correction' and 'Permanently Delete Entry'.

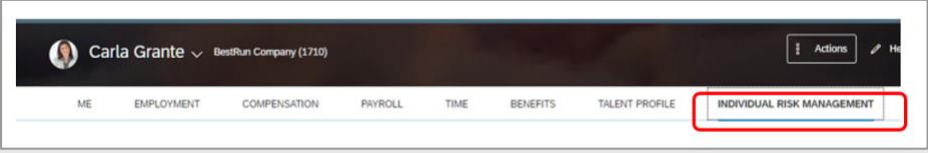

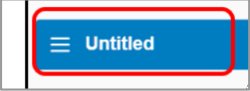
4.25

Set the Default Screen to the new Config UI

Save

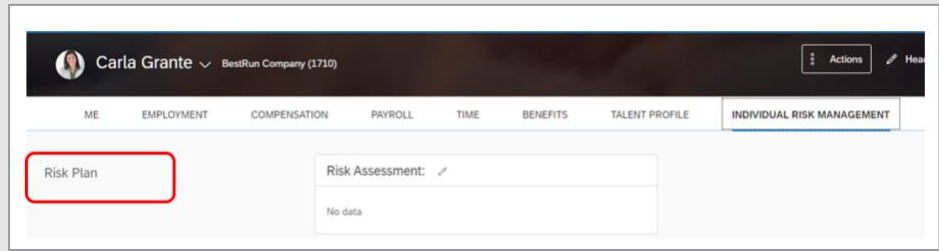
The screenshot shows the configuration page for 'Object Definition: Individual Risk Management (cust\_IRM)'. It contains several settings: 'Code' (cust\_IRM), 'Effective Dating' (Basic), 'API Visibility' (Editable), 'Status' (Active), 'MDF Version History' (Complete History), 'Default Screen' (Riz\_IndivdRiskMgmt, highlighted with a red box), and 'Label' (Individual Risk Managem).

# People Profile

Step	Task	Description
5.1	The next steps create the Section	
5.2	<p>Admin Center &gt; Tools &gt; Configure People Profile</p> <p>Select a new Section at the bottom of the page and enter a name</p> <p>Click on the blue section bar to open the “Edit Section” options</p> <p>Make sure “Show the section on the profile” is checked</p>	
5.3	<p>Use the icon by the title to drag the section to and change the position in the menu</p> <p>Click Save at the bottom of the page</p>	

5.4

The next steps add the Subsection

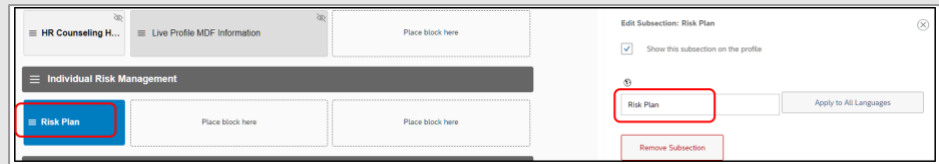


5.5

Select a new Subsection and enter a name. Make sure “Show the subsection on the profile” is checked

Click on the blue “Section” to open the “Edit Section” options

Click Save at the bottom of the page

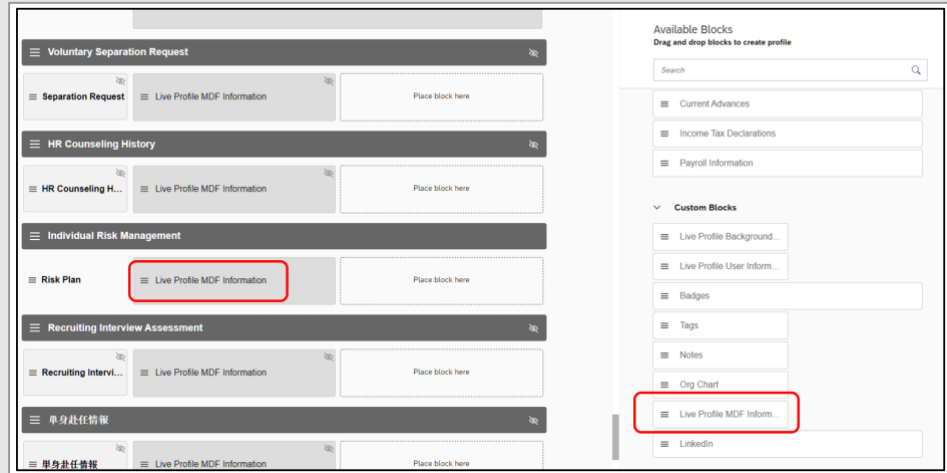


5.6

From the Available Blocks, find “Live Profile MDF Information” (scroll down to the Custom Blocks area) and drag it to the new section (you may need to close the “Edit Subsection” area”

If the list of Available Blocks does not show, click the “x” to close the Edit window

Click Save at the bottom of the page

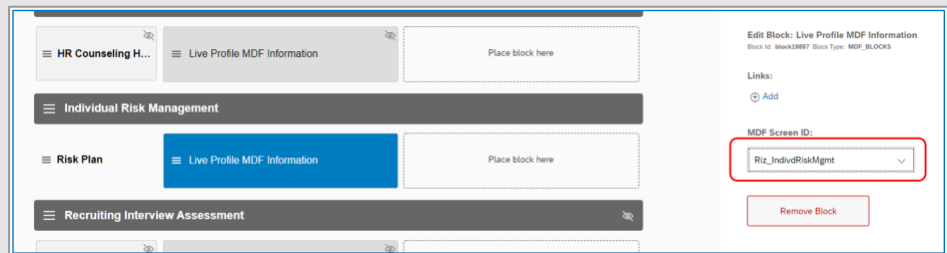


5.7

Select the new block to open the “Edit Block” options

Set the MDF Screen ID to the new Config UI

Click Save at the bottom of the page



5.8

Admin Center >  
Tools > Manage  
Permission Role

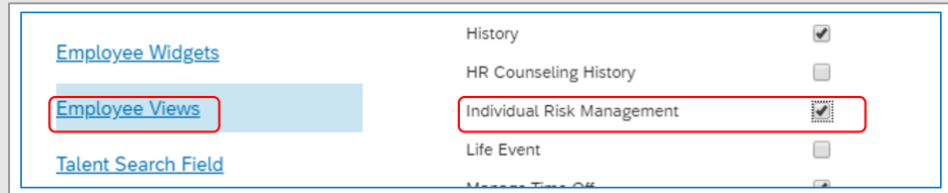
Open the admin  
role

Open Permission  
and click  
“Permission” in  
the Permission  
Settings

Under  
“Employee  
Views” check the  
new Section

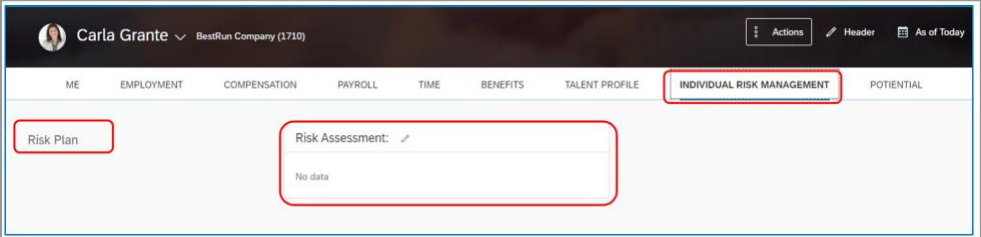
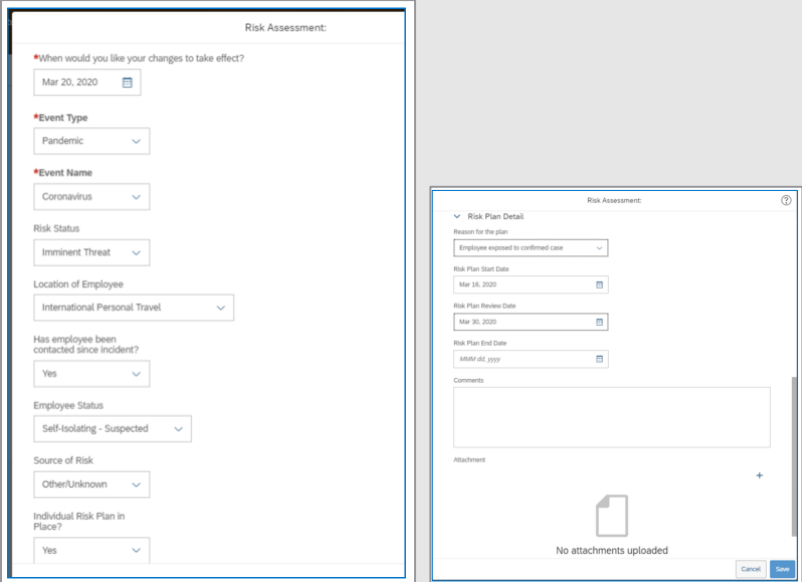
Click Done

Click Save  
Change





# Validate Configuration

Step	Task	Description
6.1	<p>Open the profile of a user for whom you have permission</p> <p>Validate that the Section, Subsection and Portlet appear on the Profile</p>	
6.2	<p>Edit the Risk Assessment and check that each field is working</p> <p>Picklist values can be updated in Picklist Center</p> <p>When “Individual Risk Plan in Place?” = Yes, the Risk Plan Detail section opens</p>	

6.3

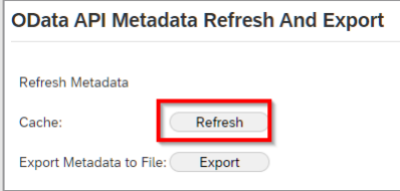
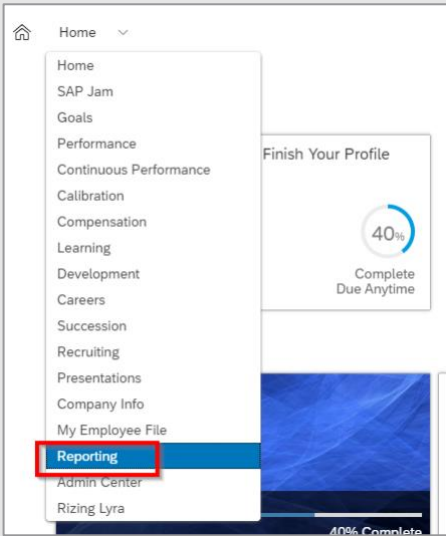
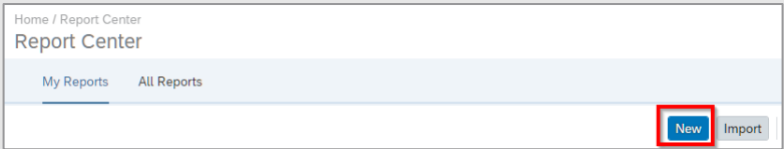
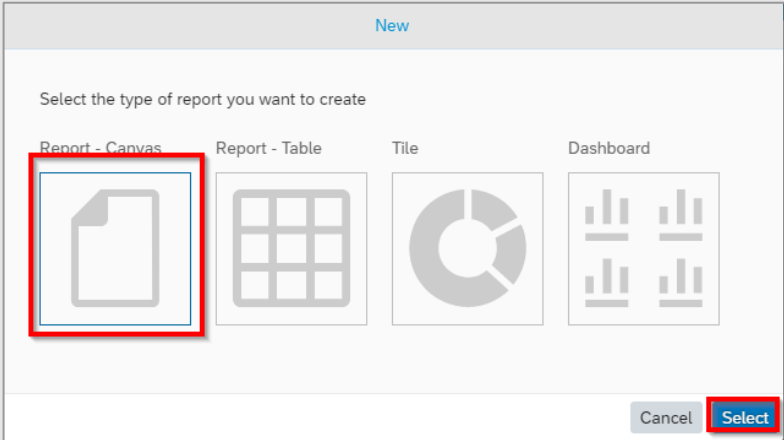
Save entry

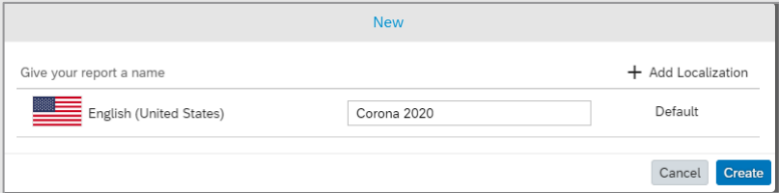
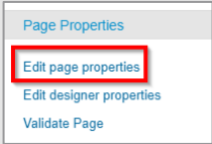
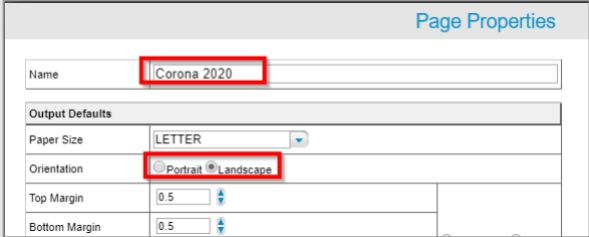
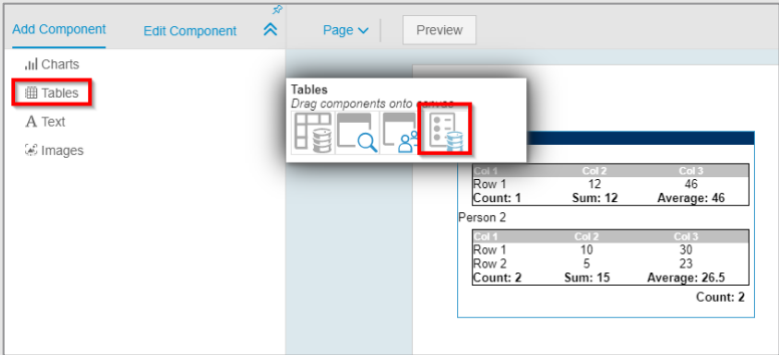
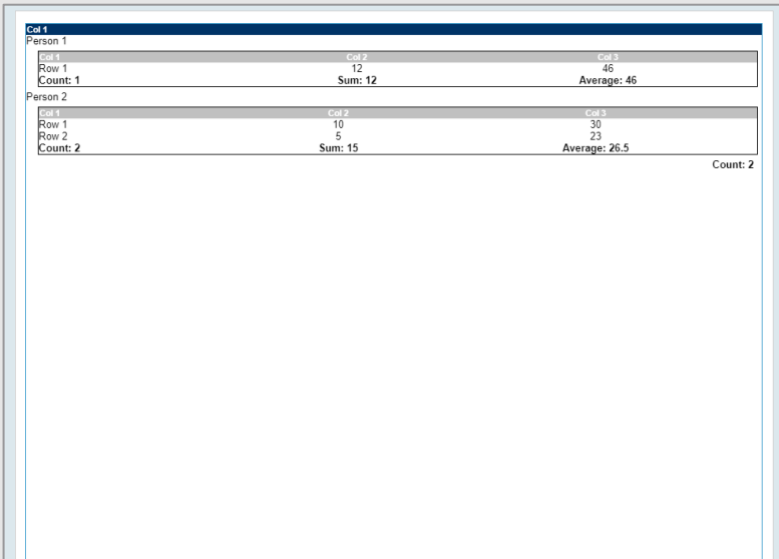
Note: Portlet is effective dated

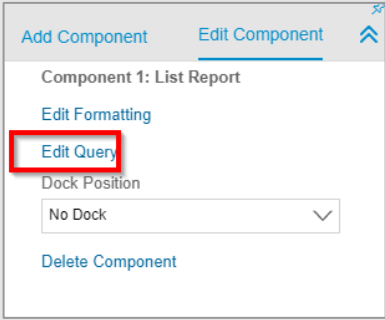
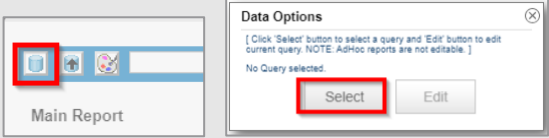
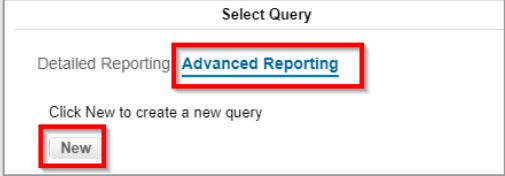
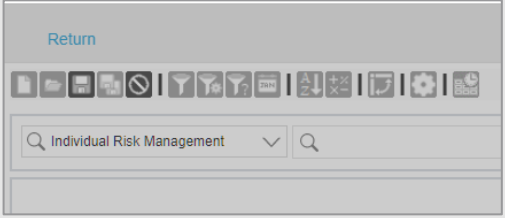
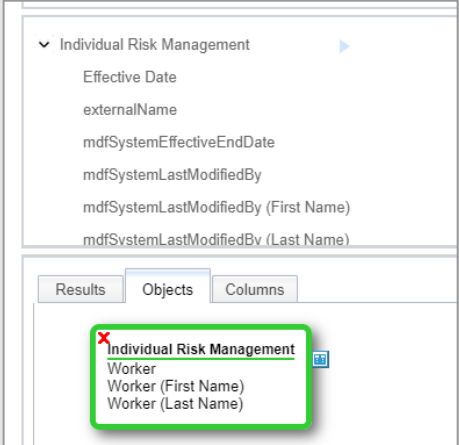
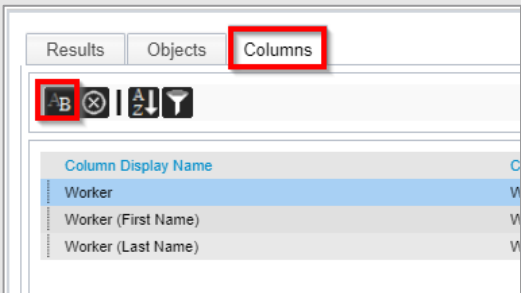
The screenshot shows the BestRun HR system interface for user Carla Grante. The top navigation bar includes the BestRun logo, a home icon, 'My Employee File', a search bar, and notification icons. Below the navigation bar, the user's name 'Carla Grante' and company 'BestRun Company (1710)' are displayed. A horizontal menu contains tabs for ME, EMPLOYMENT, COMPENSATION, PAYROLL, TIME, BENEFITS, TALENT PROFILE, and INDIVIDUAL RISK MANAGEMENT. The 'INDIVIDUAL RISK MANAGEMENT' tab is active, showing a 'Risk Plan' section. A 'Risk Assessment' form is open, with a red square highlighting a save icon. The form contains the following data:

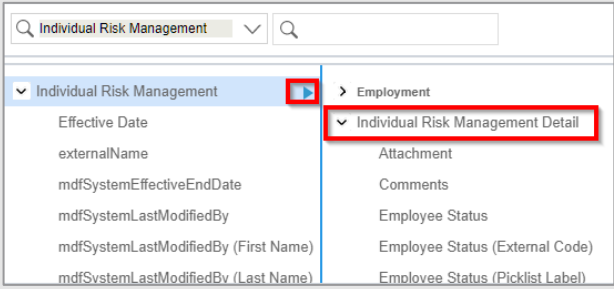
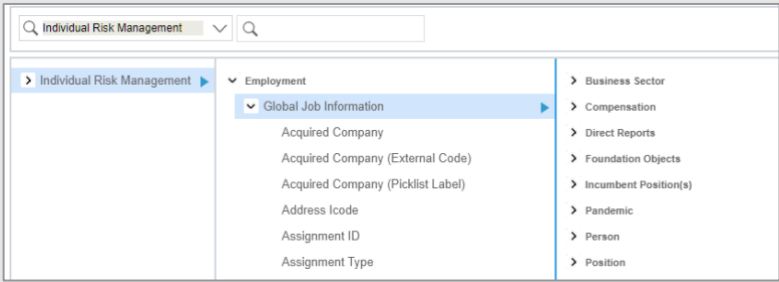


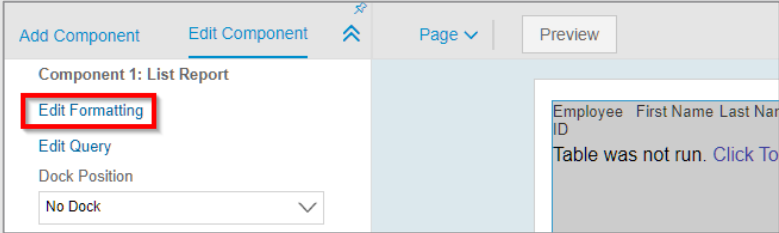
Risk Assessment:	
Effective as of:	Mar 20, 2020
Event Type	Pandemic
Event Name	Coronavirus
Risk Status	Imminent Threat
Location of Employee	International Personal Travel
Has employee been contacted since incident?	Yes
Employee Status	Self-Isolating - Suspected
Source of Risk	Other/Unknown
Individual Risk Plan in Place?	Yes
Risk Plan Detail	
Reason for the plan	Employee exposed to confirmed case
Risk Plan Start Date	Mar 16, 2020
Risk Plan Review Date	Mar 30, 2020
Risk Plan End Date	-
Comments	-
Attachment	-

# EC Advanced Report

Step	Task	Description
7.1	Admin Center > Tools > OData API Metadata Refresh And Export  Click Refresh	 <p><b>OData API Metadata Refresh And Export</b></p> <p>Refresh Metadata</p> <p>Cache: <b>Refresh</b></p> <p>Export Metadata to File: <b>Export</b></p>
7.2	Menu > Reporting	 <p>Home</p> <ul style="list-style-type: none"> <li>Home</li> <li>SAP Jam</li> <li>Goals</li> <li>Performance</li> <li>Continuous Performance</li> <li>Calibration</li> <li>Compensation</li> <li>Learning</li> <li>Development</li> <li>Careers</li> <li>Succession</li> <li>Recruiting</li> <li>Presentations</li> <li>Company Info</li> <li>My Employee File</li> <li><b>Reporting</b></li> <li>Admin Center</li> <li>Rizing Lyra</li> </ul> <p>Finish Your Profile</p> <p>40% Complete Due Anytime</p>
7.3	Click New	 <p>Home / Report Center</p> <p>Report Center</p> <p>My Reports All Reports</p> <p><b>New</b> Import</p>
7.4	Click Report - Canvas Click Select	 <p>New</p> <p>Select the type of report you want to create</p> <p>Report - Canvas Report - Table Tile Dashboard</p> <p><b>Select</b></p>

7.5	Name the Report Click Create																												
7.6	Edit Page Properties (bottom left of screen)																												
7.7	Update name Set Orientation to Landscape  Click OK																												
7.8	Add Component Table > List Report Drag to the Canvas	 <table border="1" data-bbox="1097 961 1393 1119"> <thead> <tr> <th>Col 1</th> <th>Col 2</th> <th>Col 3</th> </tr> </thead> <tbody> <tr> <td>Row 1</td> <td>12</td> <td>46</td> </tr> <tr> <td>Count: 1</td> <td>Sum: 12</td> <td>Average: 46</td> </tr> <tr> <td colspan="3">Person 2</td> </tr> <tr> <td>Col 1</td> <td>Col 2</td> <td>Col 3</td> </tr> <tr> <td>Row 1</td> <td>10</td> <td>30</td> </tr> <tr> <td>Row 2</td> <td>5</td> <td>23</td> </tr> <tr> <td>Count: 2</td> <td>Sum: 15</td> <td>Average: 26.5</td> </tr> <tr> <td colspan="3" style="text-align: right;">Count: 2</td> </tr> </tbody> </table>	Col 1	Col 2	Col 3	Row 1	12	46	Count: 1	Sum: 12	Average: 46	Person 2			Col 1	Col 2	Col 3	Row 1	10	30	Row 2	5	23	Count: 2	Sum: 15	Average: 26.5	Count: 2		
Col 1	Col 2	Col 3																											
Row 1	12	46																											
Count: 1	Sum: 12	Average: 46																											
Person 2																													
Col 1	Col 2	Col 3																											
Row 1	10	30																											
Row 2	5	23																											
Count: 2	Sum: 15	Average: 26.5																											
Count: 2																													
7.9	Resize the component to fill the canvas																												

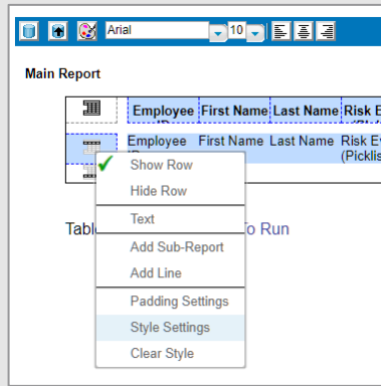
7.10	Edit Query	
7.11	Modify the data source Data Option = Select	
7.12	Click "Advanced Reporting" Click "New"	
7.13	Select "Individual Risk Management"	
7.14	Drag fields to the Objects Window  Worker Worker (First Name) Worker (Last Name)	
7.15	In the Columns tab, select each field and click the "Rename" option to rename  Worker = Employee Id Worker (First Name) = First Name	

	Worker (Last Name) = Last Name																																																	
7.16	Drill to the Details																																																	
7.17	Drag Fields to the report and rename as needed  For Picklist fields, be sure to use the fields with “(Picklist Label)”	<table border="1" data-bbox="651 537 1419 829"> <thead> <tr> <th>Column Display Name</th> <th>Column Original Name</th> <th>Table Name</th> </tr> </thead> <tbody> <tr><td>Employee ID</td><td>Worker</td><td>Individual Risk Management</td></tr> <tr><td>First Name</td><td>Worker (First Name)</td><td>Individual Risk Management</td></tr> <tr><td>Last Name</td><td>Worker (Last Name)</td><td>Individual Risk Management</td></tr> <tr><td>Event</td><td>Name (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Event Type</td><td>Risk Event (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Event Status</td><td>Risk Status (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Employee Status</td><td>Employee Status (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Risk Source</td><td>Risk Source (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Location of Employee</td><td>Location of Employee (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Has employee been contacted since incident?</td><td>Has employee been contacted since incident?</td><td>Individual Risk Management Detail</td></tr> <tr><td>Individual Risk Plan in Place?</td><td>Individual Risk Plan in Place?</td><td>Individual Risk Management Detail</td></tr> <tr><td>Reason for the Plan</td><td>Reason for the plan (Picklist Label)</td><td>Individual Risk Management Detail</td></tr> <tr><td>Risk Plan Review Date</td><td>Risk Plan Review Date</td><td>Individual Risk Management Detail</td></tr> <tr><td>Risk Plan Start Date</td><td>Risk Plan Start Date</td><td>Individual Risk Management Detail</td></tr> <tr><td>Risk Plan End Date</td><td>Risk Plan End Date</td><td>Individual Risk Management Detail</td></tr> </tbody> </table>	Column Display Name	Column Original Name	Table Name	Employee ID	Worker	Individual Risk Management	First Name	Worker (First Name)	Individual Risk Management	Last Name	Worker (Last Name)	Individual Risk Management	Event	Name (Picklist Label)	Individual Risk Management Detail	Event Type	Risk Event (Picklist Label)	Individual Risk Management Detail	Event Status	Risk Status (Picklist Label)	Individual Risk Management Detail	Employee Status	Employee Status (Picklist Label)	Individual Risk Management Detail	Risk Source	Risk Source (Picklist Label)	Individual Risk Management Detail	Location of Employee	Location of Employee (Picklist Label)	Individual Risk Management Detail	Has employee been contacted since incident?	Has employee been contacted since incident?	Individual Risk Management Detail	Individual Risk Plan in Place?	Individual Risk Plan in Place?	Individual Risk Management Detail	Reason for the Plan	Reason for the plan (Picklist Label)	Individual Risk Management Detail	Risk Plan Review Date	Risk Plan Review Date	Individual Risk Management Detail	Risk Plan Start Date	Risk Plan Start Date	Individual Risk Management Detail	Risk Plan End Date	Risk Plan End Date	Individual Risk Management Detail
Column Display Name	Column Original Name	Table Name																																																
Employee ID	Worker	Individual Risk Management																																																
First Name	Worker (First Name)	Individual Risk Management																																																
Last Name	Worker (Last Name)	Individual Risk Management																																																
Event	Name (Picklist Label)	Individual Risk Management Detail																																																
Event Type	Risk Event (Picklist Label)	Individual Risk Management Detail																																																
Event Status	Risk Status (Picklist Label)	Individual Risk Management Detail																																																
Employee Status	Employee Status (Picklist Label)	Individual Risk Management Detail																																																
Risk Source	Risk Source (Picklist Label)	Individual Risk Management Detail																																																
Location of Employee	Location of Employee (Picklist Label)	Individual Risk Management Detail																																																
Has employee been contacted since incident?	Has employee been contacted since incident?	Individual Risk Management Detail																																																
Individual Risk Plan in Place?	Individual Risk Plan in Place?	Individual Risk Management Detail																																																
Reason for the Plan	Reason for the plan (Picklist Label)	Individual Risk Management Detail																																																
Risk Plan Review Date	Risk Plan Review Date	Individual Risk Management Detail																																																
Risk Plan Start Date	Risk Plan Start Date	Individual Risk Management Detail																																																
Risk Plan End Date	Risk Plan End Date	Individual Risk Management Detail																																																
7.18	Drill to Employment Details to add job related fields																																																	
7.19	Add runtime or report filters if needed																																																	
7.20	Click Save Click Return Click O																																																	
7.21	Click “Edit Formatting”																																																	

7.22

Use Style Settings and menu tools to format as needed

Click OK

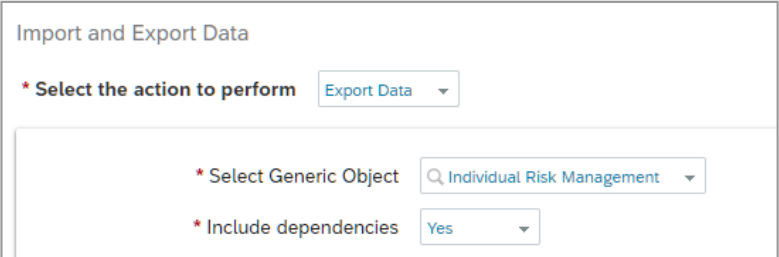
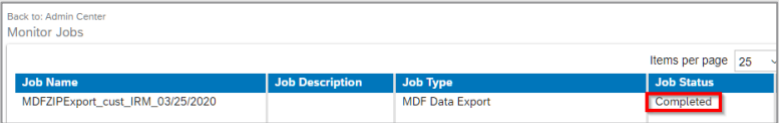



The screenshot shows a report viewer window titled 'Page 1 of ...'. It contains a table with the following data:

Country	Employee ID	First Name	Last Name	Event	Event Type	Event Status	Self-Is
Ireland	100039	Test	Test	Coronavirus	Pandemic	Potential Threat	Self-Is
Australia	100018	Clark	Kent TEST USER	Coronavirus	Pandemic	Potential Threat	Self-Is
United States	dddd	Test	Drew	Coronavirus	Pandemic	Potential Threat	Self-Is

# Extracting Data for Manual Report Creation

For clients who do not have Employee Central Advanced Reporting, the data can be extracted to combine and format in Excel

Step	Task	Description
8.1	<p>Data can be exported for manual report creation using Excel and VLOOKUPS</p> <p>Admin Center &gt; Tools &gt; Import and Export Data</p> <p>Action to perform = Export Data</p> <p>Select Generic Option = Individual Risk Management</p> <p>Include Dependencies = Yes</p> <p>Click Export</p>	
8.2	<p>Admin Center &gt; Tools &gt; Monitor Job</p> <p>Refresh screen until the export is complete</p>	
8.3	<p>Scroll to the right and click the download link</p> <p>A Zip file will download</p> <p>Save file</p>	



8.4

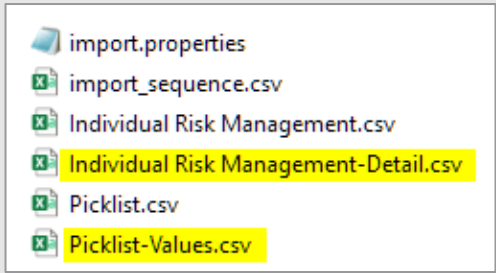
Extract the zip file

Open files in Excel:

Individual Risk Management-  
Detail.csv

Picklist-Values.csv

These 2 sheets contain the data  
needed to create reports



# Disclaimer

---

This document, or any related presentation, is subject to change and may be changed by Rizing LLC or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties of merchantability or fitness for a particular purpose. No contractual obligations are formed either directly or indirectly by this document. This document is for informational purposes and is not incorporated into an agreement with Rizing LLC and/or its affiliates. Rizing LLC and its affiliates assume no responsibility for errors or omissions in this document, except if such damages were caused by its or their intentional or gross negligence.

Rizing is/are trademarks or registered trademarks of Rizing LLC and/or its affiliates in the United States and other countries.

SAP SuccessFactors is/are the trademark(s) or registered trademark(s) of SAP SE in Germany and in several other countries.

All other trademarks referenced herein are the property of their respective owners.