COVID-19
Information Portlet
Configuration Guide

Individual Risk Management

March 2020

RIZING

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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 and we can help free of charge.

Create Picklists

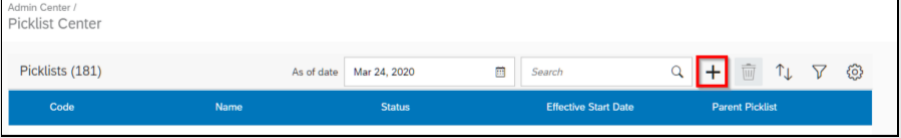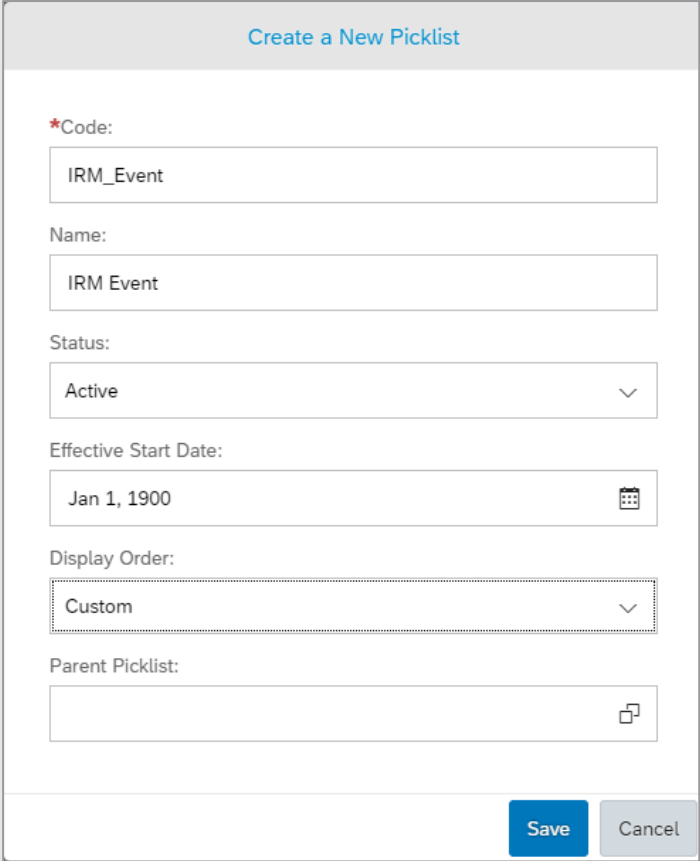| Step	Task	Description
1.1	Admin Center > Tools > Picklist Center	
1.2	Create the **IRM Event** Picklist Click the icon to add a new picklist	Admin Center / Picklist Center — Picklists (181) — As of date Mar 24, 2020 — Search — Code, Name, Status, Effective Start Date, Parent Picklist
1.3	Enter the information for the Picklist Code = IRM_Event Name = IRM Event Status = Active Effective Start Date = Jan 1, 1900 Display Order = Custom Parent Picklist = blank *For the remaining picklists, Parent Picklist will be as per the table* Save	**Create a New Picklist** *Code: IRM_Event Name: IRM Event Status: Active Effective Start Date: Jan 1, 1900 Display Order: Custom Parent Picklist: Save Cancel

1.4	Click the icon to add Picklist Values	
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*	

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 Admin Center / Picklist Center Picklists (7) As of date Mar 24, 2020 irm + 🗑 ↕ ▽ ⚙

	Code	Name	Status	Effective Start Date	Parent Picklist
○	IRM_Event	IRM Risk Event	Active	Jan 1, 1900	
○	IRM_Location	IRM Location	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
○	IRM_Name	IRM Risk Name	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
○	IRM_RiskPlanReason	IRM Risk Plan Reason	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
○	IRM_RiskSource	IRM Risk Source	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
○	IRM_Status	IRM Status	Active	Jan 1, 1900	IRM Risk Event (IRM_Event)
○	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
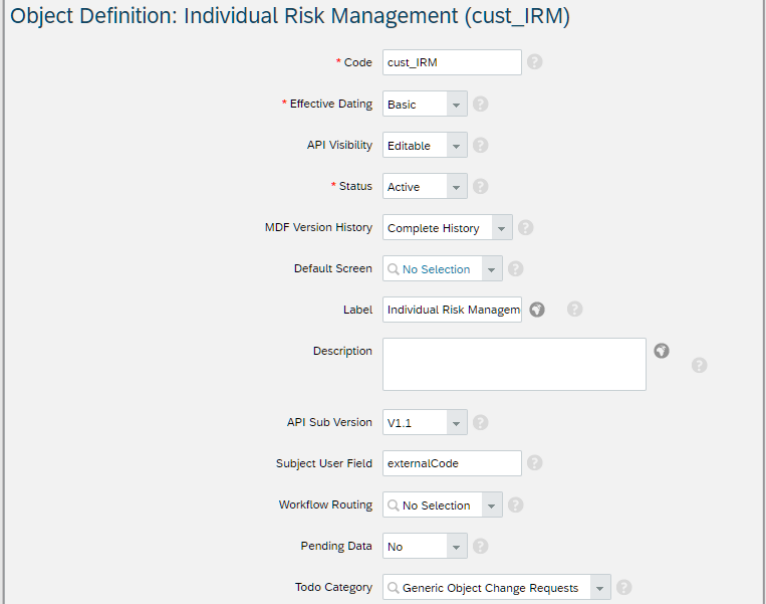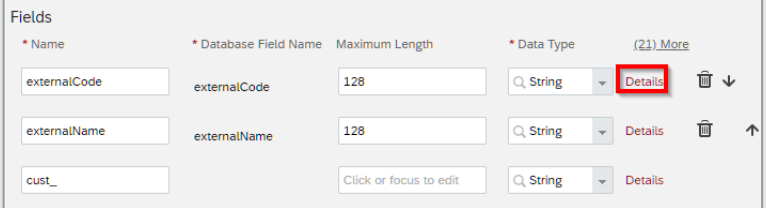
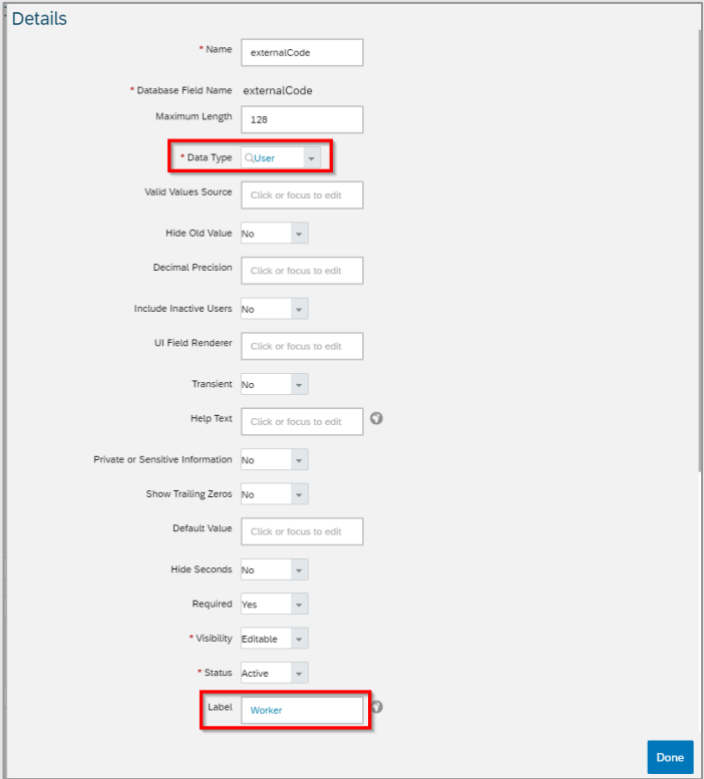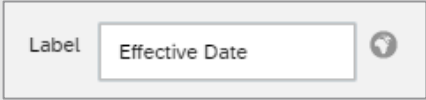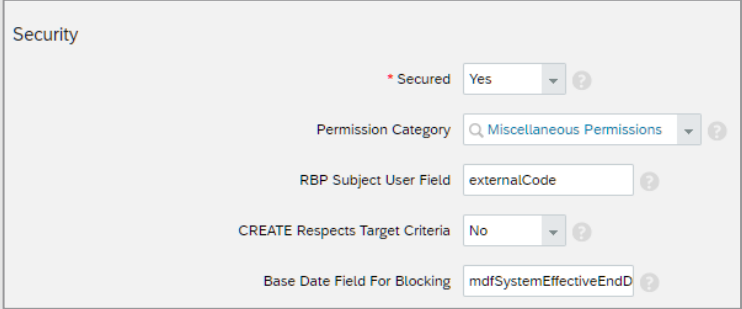| Picklist	External Code	Label	Parent Picklist	Status	Non-unique Code	SortOrder
IRM_Event	IRM_1	Pandemic		ACTIVE	1	10
IRM_Name	COVID-19	Coronavirus	IRM_1	ACTIVE	COVID-19	10
IRM_empStatus	IRM_EMP_1	No Interventions	IRM_1	ACTIVE	1	10

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 **Object Definition**	
2.2	Code = cust_IRM Effective Dating = Basic API Visibility = Editable Label = Individual Risk Management To Do Category = Generic Object Change Requests *If you receive warning messages when changing the Effective Dating, click Yes*	
2.3	Under **Fields**, click the Details link next to externalCode	

2.4	Data Type = User Label = "Worker" Leave remaining fields as default Click Done	
2.5	Under **Fields**, click the Details link next to effectiveStartDate Label = Effective Date Leave remaining fields as default Click Done	
2.6	Under **Security** set: Secured = Yes Permission Category = "Miscellaneous Permissions"	
2.7	Click Save *You will grant role-based permission in a later step*	
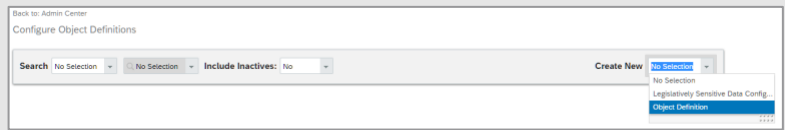
2.8	Admin Center > Tools > Configure Object Definition Create New Object Definition	
2.9	1. Code = cust_IRM_Detail 2. Effective Dating = From Parent 3. API Visibility = Editable 4. Label = Individual Risk Management Detail 5. To Do Category = Generic Object Change Requests *If you receive warning messages 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	
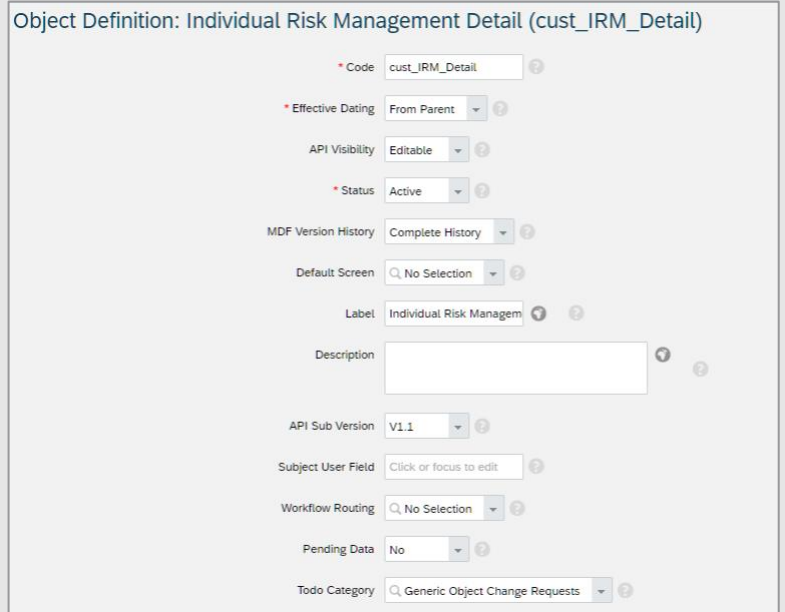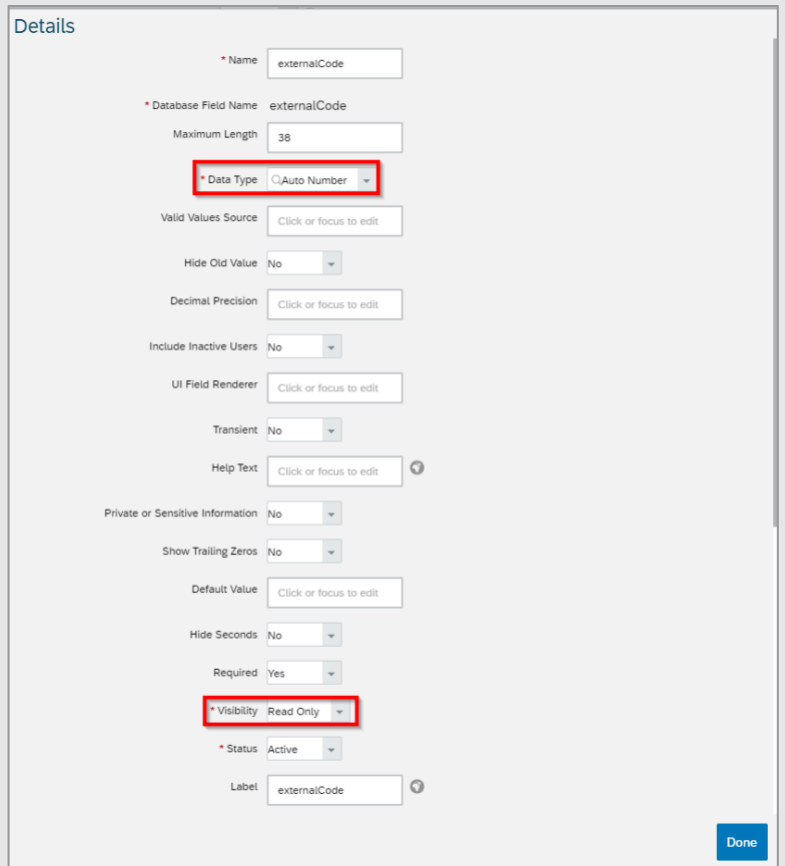
2.11	Under **Fields**, click the Details link next to **externalName**	
	Data Type = Picklist	
	Valid Values Source = IRM_Event	
	UI Field Renderer = displayPickListWithoutExternalCode	
	Required = Yes	
	Visibility = Editable	
	Label = Risk Event	
	Leave remaining fields as default	
	Click Done	
2.12	The next steps will add new fields by clicking Details in the next available "cust_" field	

2.13	Create the **Event Name** field Name = cust_Name Data Type = Picklist Valid Values Source = IRM_Name UI Field Renderer = displayPickListWithoutExternalCode Visibility = Editable Label = Name Click Done	
2.14	Create the **Status** field Name = cust_status Data Type = Picklist Valid Values Source = IRM_Status UI Field Renderer = displayPickListWithoutExternalCode Visibility = Editable Label = Risk Status Click 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	
2.16	Create the **Has Employee been contacted** field Name = cust_contacted Data Type = Boolean Visibility = Editable Label = Has employee been contacted? Click 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	
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	

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	**Details** * Name: cust_riskPlanReason * Database Field Name: sfFields.sfField7 Maximum Length: 38 * Data Type: Picklist Valid Values Source: IRM_RiskPlanReason Hide Old Value: No Decimal Precision: Click or focus to edit Include Inactive Users: No UI Field Renderer: displayPickListWithoutEx 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: No * Visibility: Editable * Status: Active Label: Reason for the plan Done
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	**Details** * Name: cust_riskSource * Database Field Name: sfFields.sfField13 Maximum Length: 38 * Data Type: Picklist Valid Values Source: IRM_RiskSource Hide Old Value: No Decimal Precision: Click or focus to edit Include Inactive Users: No UI Field Renderer: displayPickListWithoutExt 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: No * Visibility: Editable * Status: Active Label: Risk Source Done

2.21	Create the **Risk Plan Start Date** field Name = cust_riskPlanStart Data Type = Date Visibility = Editable Label = Risk Plan Start Date	
2.22	Create the **Risk Plan Review Date** field Name = cust_riskPlanReview Data Type = Date Visibility = Editable Label = Risk Plan Review Date	

2.23	Create the **Risk Plan End Date** field Name = cust_riskPlanEnd Data Type = Date Visibility = Editable Label = Risk Plan End Date	**Details** Name: cust_riskPlanEnd * Database Field Name: sfFields.sfField10 Maximum Length: 10 * Data Type: Date Valid Values Source: Click or focus to edit Hide Old Value: No Decimal Precision: Click or focus to edit Include Inactive Users: No UI Field Renderer: Click or focus to edit 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: No * Visibility: Editable * Status: Active Label: Risk Plan End Date Done
2.24	Create the **Comments** field Name = cust_Comments Maximum Length = 400 Data Type = String Visibility = Editable Label = Comments Click Done	**Details** * Name: cust_comments * Database Field Name: sfFields.sfField11 Maximum Length: 400 * Data Type: String Valid Values Source: Click or focus to edit Hide Old Value: No Decimal Precision: Click or focus to edit Include Inactive Users: No UI Field Renderer: Click or focus to edit 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: No * Visibility: Editable * Status: Active Label: Comments Done

2.25	Create the **Attachments** field Name = cust_attachment Data Type = Attachment Visibility = Editable Label = Attachment	Details
2.26	Under **Security** set: Secured = Yes Permission Category = "Miscellaneous Permissions"	Security
2.27	Click Save	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

2.29	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	
2.30	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*	
2.31	Admin Center > Tools > Configure Object Definition Search = Object Definition Individual Risk Management Detail Take Action > Make Correction	
2.32	Under **Save Rules** add rule riz_ClearRiskPlan Save the object *You will grant role-based permission in a later step*	
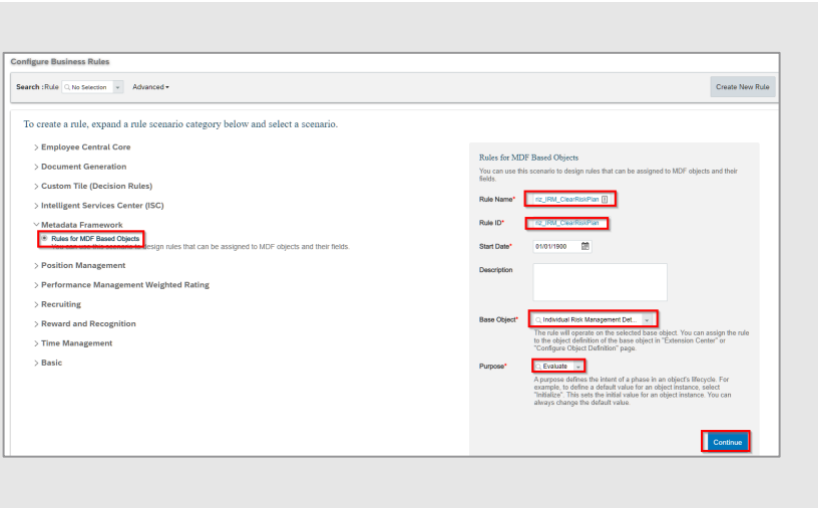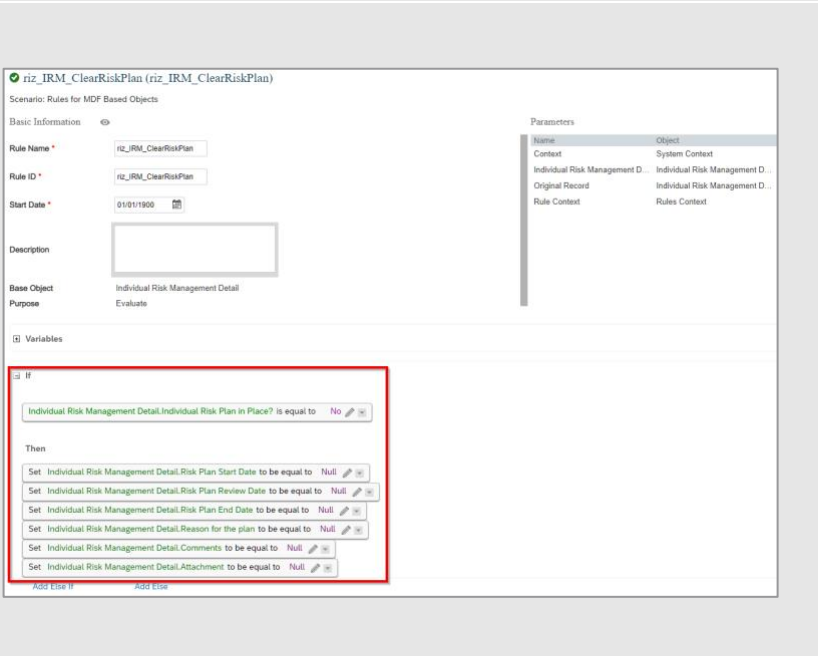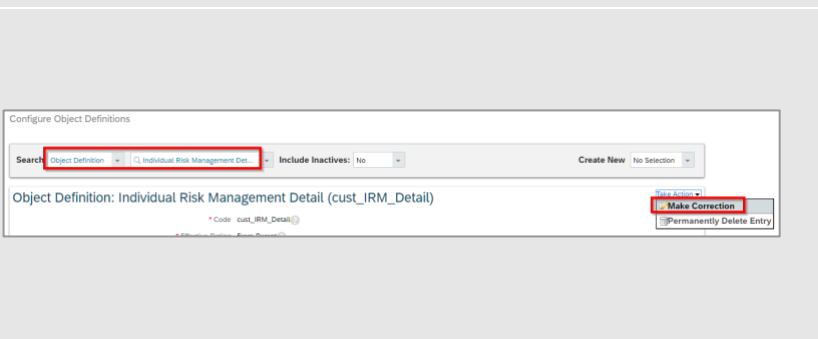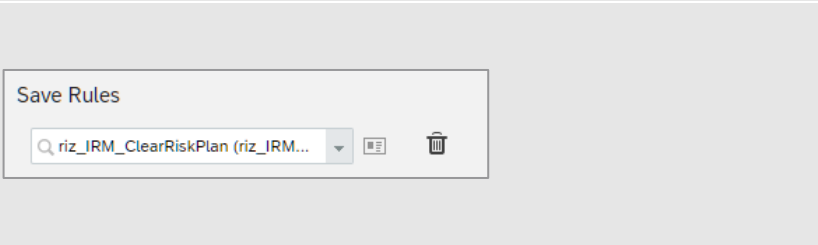
2.33	Admin Center > Tools > Configure Object Definition Search = Object Definition Individual Risk Management Take Action > Make Correction	
2.34	Scroll down to the Associations section Name = cust_toDetail Multiplicity = One to Many Destination Object = "Individual Risk Management Detail" Click Details link	
2.35	Set Label = "Detail" Click Done Save the Object	
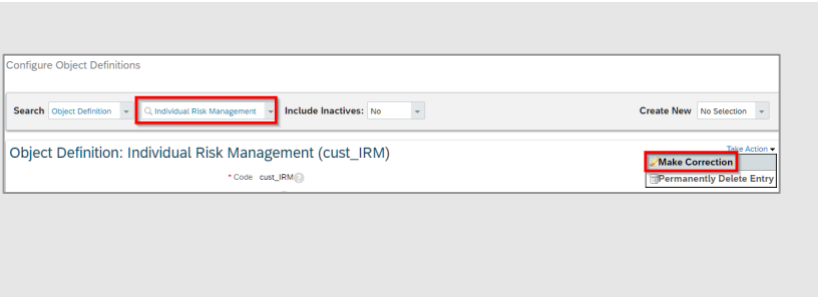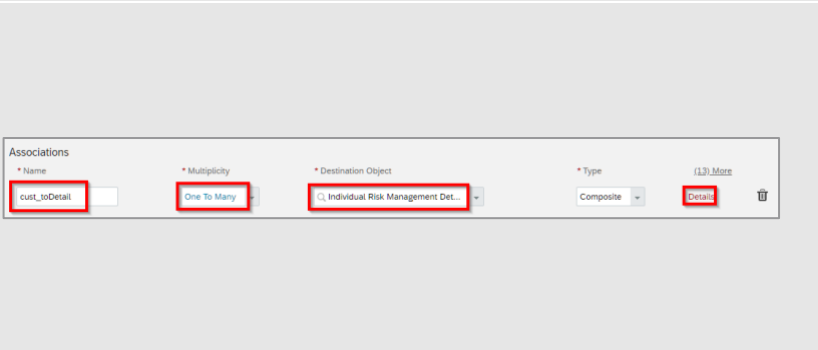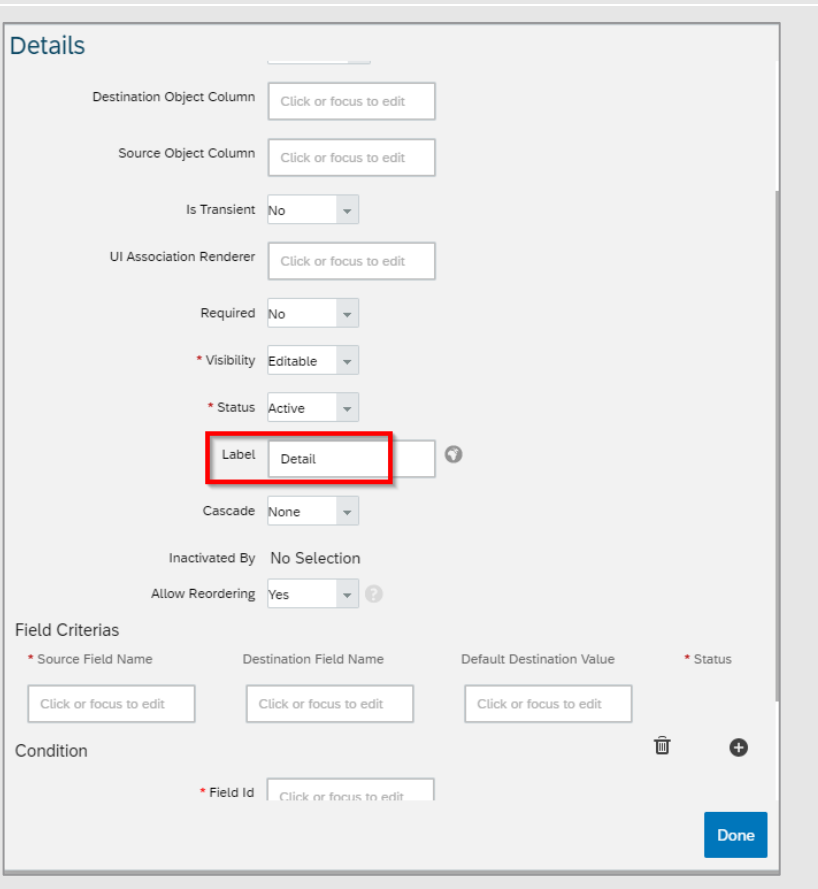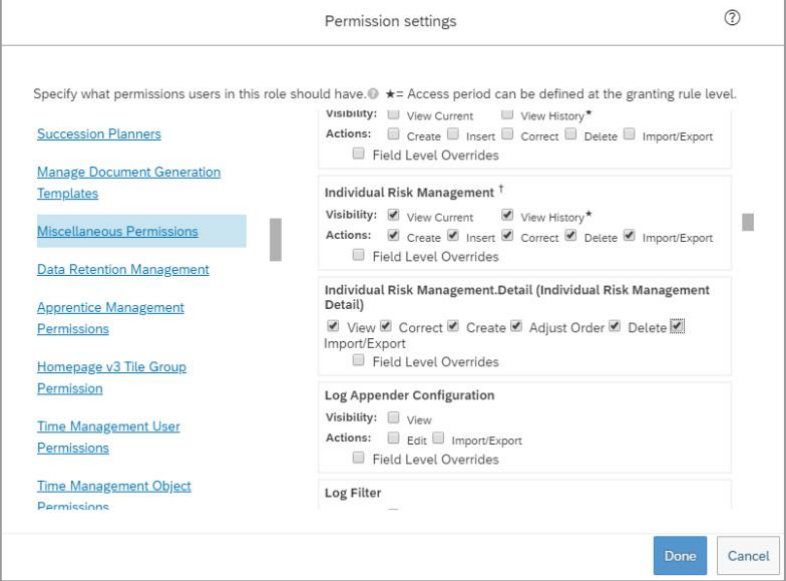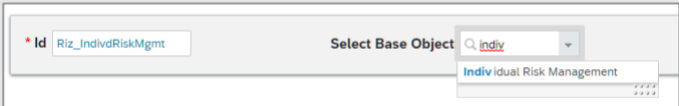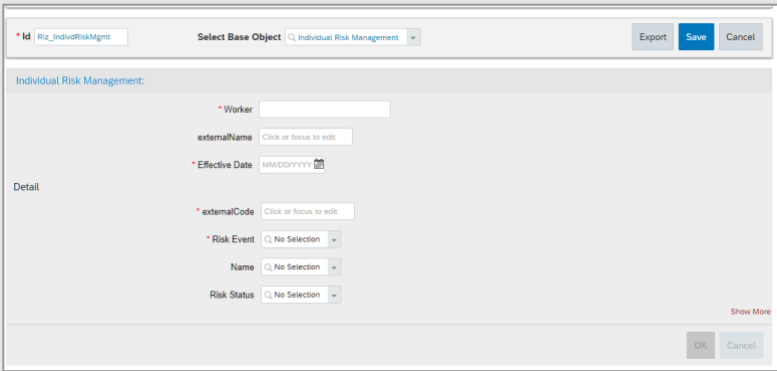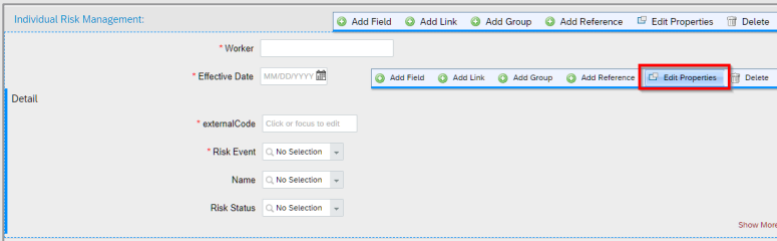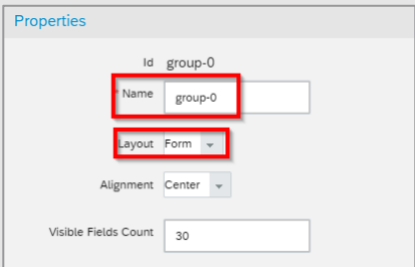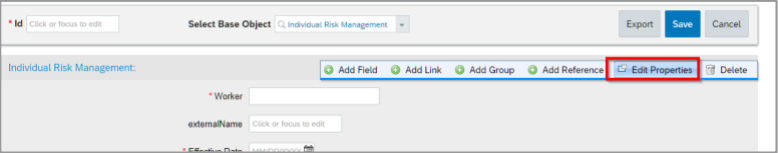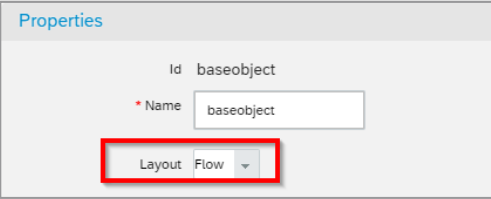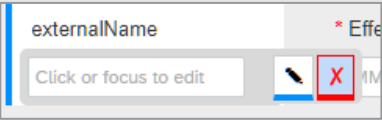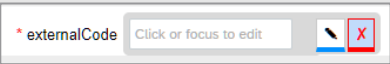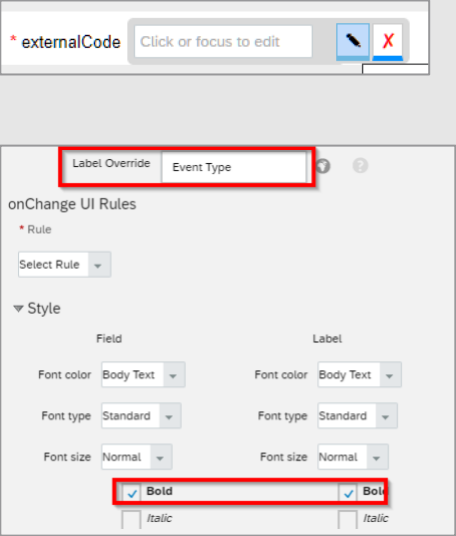
Permission for Custom Objects

Step	Task	Description
3.1	Admin Center > Tools > Manage Permission Role Select super admin role (or role responsible for maintaining portlet) Open Permission role and click "Permission" In "Miscellaneous Permissions" check appropriate permissions for the objects: Individual Risk Management • View Current • View History • Create • Insert • Correct • Delete • Import/Export Individual Risk Management Detail • View • Correct • Create • Adjust Order • Delete Click "Done" Click "Save Changes"	

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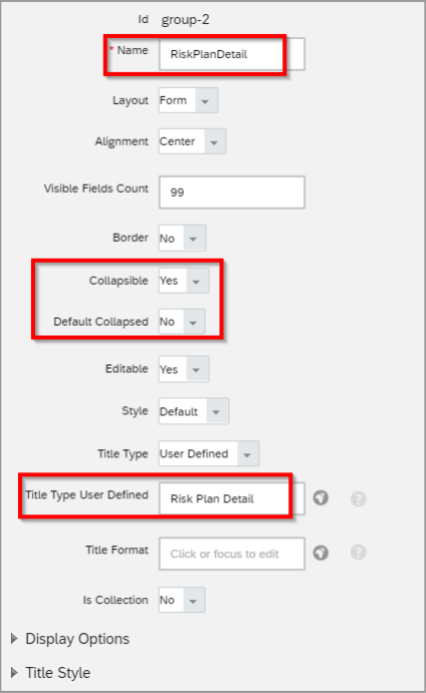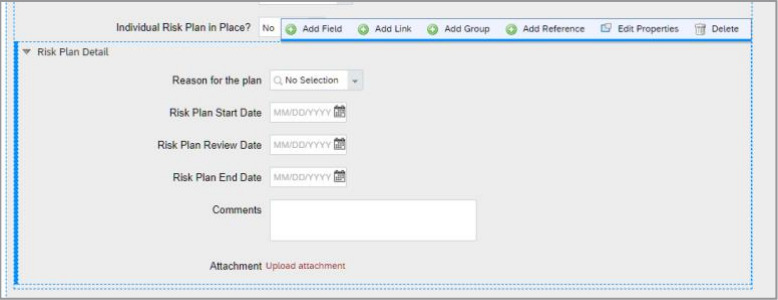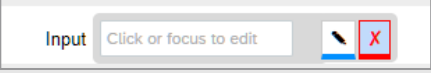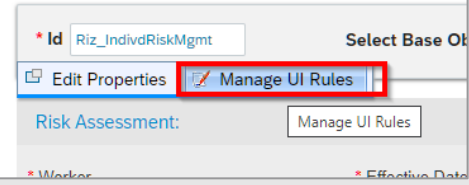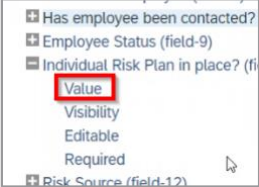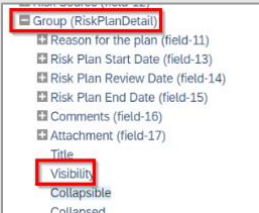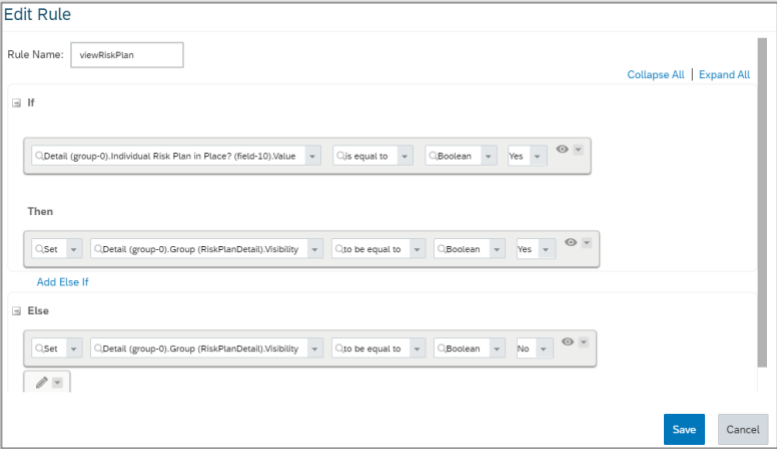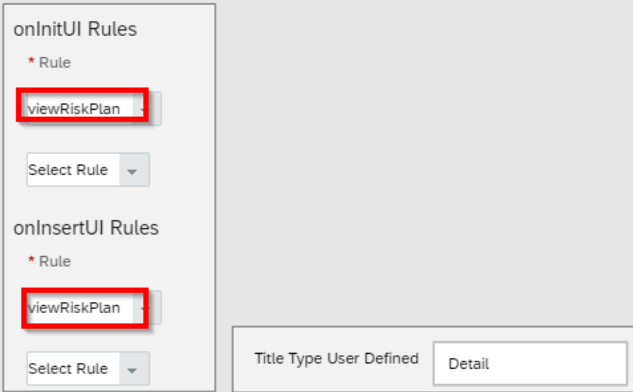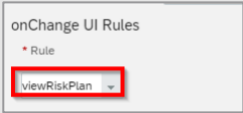
4.14	Name = "RiskPlanDetail" Collapsible = Yes Default Collapsed = No Title Type User Defined = Risk Plan Detail Click Ok	
4.15	Click on each field and drag into the new "Risk Plan Detail" group Reason for the plan Risk Plan Start Date Risk Plan Review Date Risk Plan End Date Comments Attachment	
4.16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

4.19	Enter rule logic and save Close the UI Rules window *Note, drill to the field value:* **Has employee been contacted?** **Employee Status (field-9)** **Individual Risk Plan in place? (fi** Value Visibility Editable Required **Risk Source (field-12)** **Group (RiskPlanDetail)** **Reason for the plan (field-11)** **Risk Plan Start Date (field-13)** **Risk Plan Review Date (field-14)** **Risk Plan End Date (field-15)** **Comments (field-16)** **Attachment (field-17)** Title Visibility Collapsible Collapsed	**Edit Rule** Rule Name: viewRiskPlan Collapse All | Expand All If Detail (group-0).Individual Risk Plan in Place? (field-10).Value ▾ is equal to ▾ Boolean ▾ Yes ▾ ◉ ▾ **Then** Set ▾ Detail (group-0).Group (RiskPlanDetail).Visibility ▾ to be equal to ▾ Boolean ▾ Yes ▾ ◉ ▾ Add Else If Else Set ▾ Detail (group-0).Group (RiskPlanDetail).Visibility ▾ to be equal to ▾ Boolean ▾ No ▾ ◉ ▾ ✏ ▾ Save Cancel *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.*
4.20	Hover over the header on top left of form and select "Edit Properties"	* Id Riz_IndivdRiskMgmt **Select Base** ⧉ Edit Properties ✐ Manage UI Rules Risk Assessn Edit Properties
4.21	Add new rule to onInitUI Rules and onInsertUI Rules Clear the Title Type User Defined field Click OK	onInitUI Rules * Rule viewRiskPlan ▾ Select Rule ▾ onInsertUI Rules * Rule viewRiskPlan ▾ Select Rule ▾ Title Type User Defined Detail
4.22	Hover over Individual Risk Plan in Place and click the edit icon Set the OnChange UI Rule Click OK	onChange UI Rules * Rule viewRiskPlan ▾

4.23	Click Save	
4.24	Admin Center > Tools > Configuration Object Definition Search Object Definition > Individual Risk Management Take Action > Make Correction	
4.25	Set the Default Screen to the new Config UI Save	
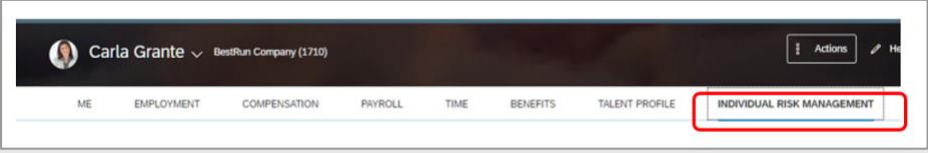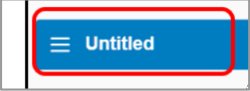
People Profile

Step	Task	Description
5.1	The next steps create the Section	
5.2	Admin Center > Tools > Configure People Profile

Select a new Section at the bottom of the page and enter a name

Click on the blue section bar to open the "Edit Section" options

Make sure "Show the section on the profile" is checked | |
| 5.3 | Use the icon by the title to drag the section to and change the position in the menu

Click Save at the bottom of the page | |

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	
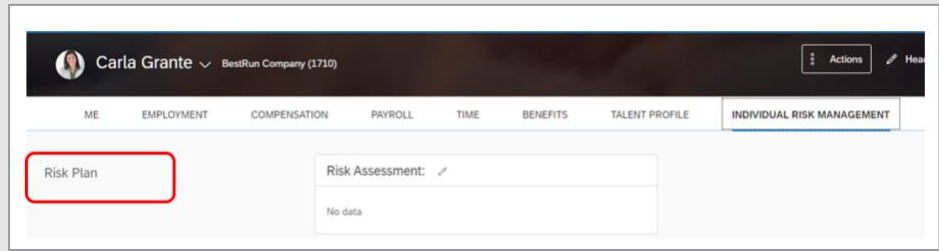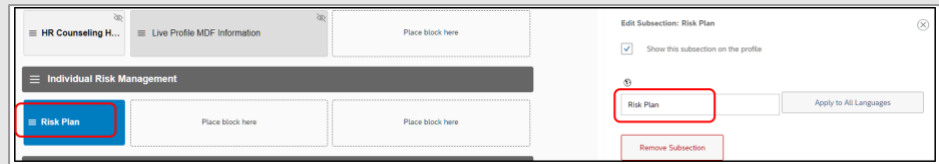
5.6	From the Available Blocks, find "Live Profile MDF Information" (scroll down to the Custom Blocks area) and drag it to the new section (you may need to close the "Edit Subsection" area") If the list of Available Blocks does not show, click the "x" to close the Edit window Click Save at the bottom 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	
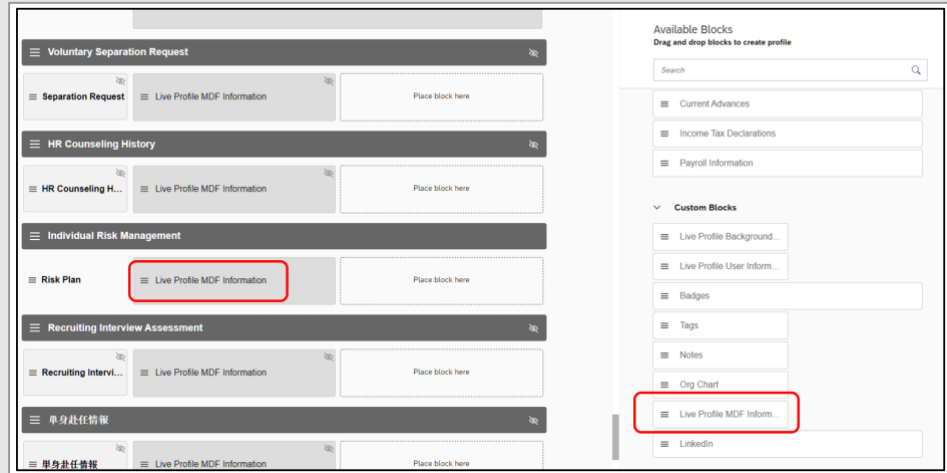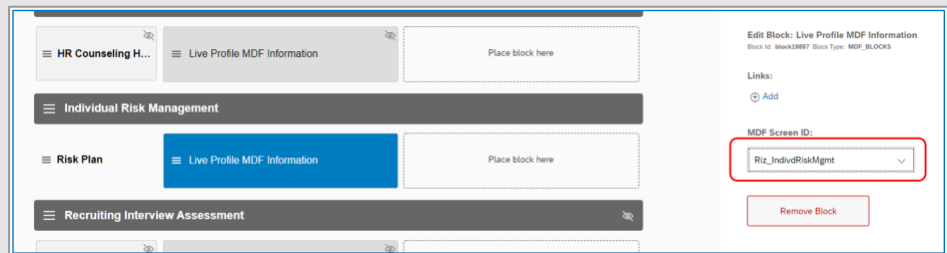
5.8	Admin Center > Tools > Manage Permission Role Open the admin role Open Permission and click "Permission" in the Permission Settings Under "Employee Views" check the new Section Click Done Click Save Change	
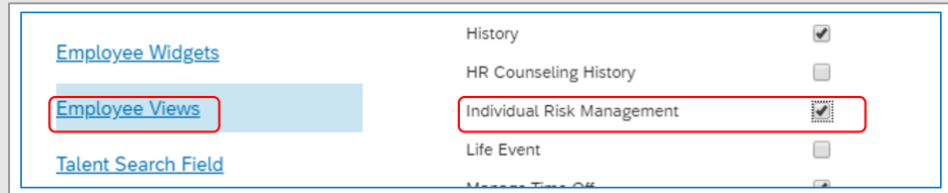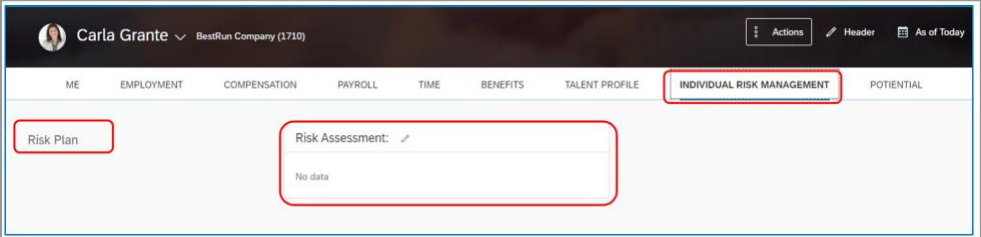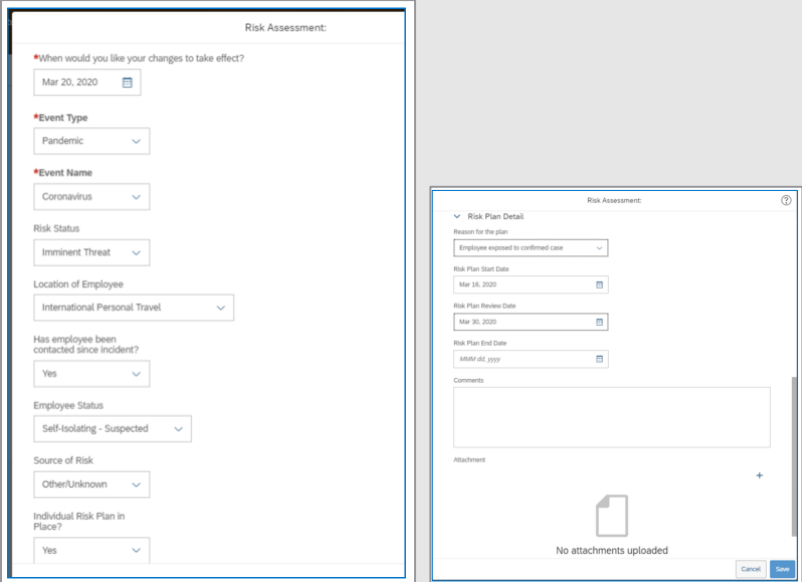
Validate Configuration

Step	Task	Description
6.1	Open the profile of a user for whom you have permission Validate that the Section, Subsection and Portlet appear on the Profile	
6.2	Edit the Risk Assessment and check that each field is working Picklist values can be updated in Picklist Center When "Individual Risk Plan in Place?" = Yes, the Risk Plan Detail section opens	
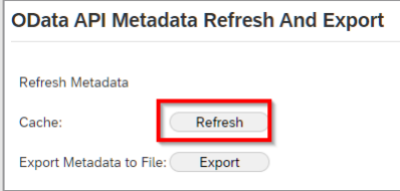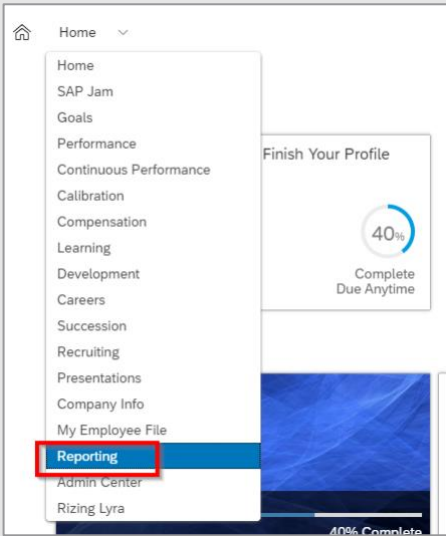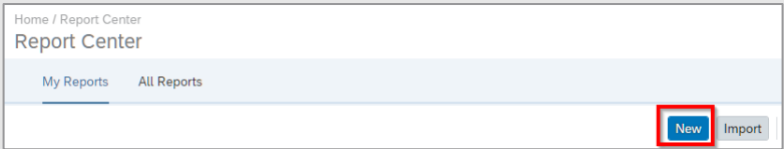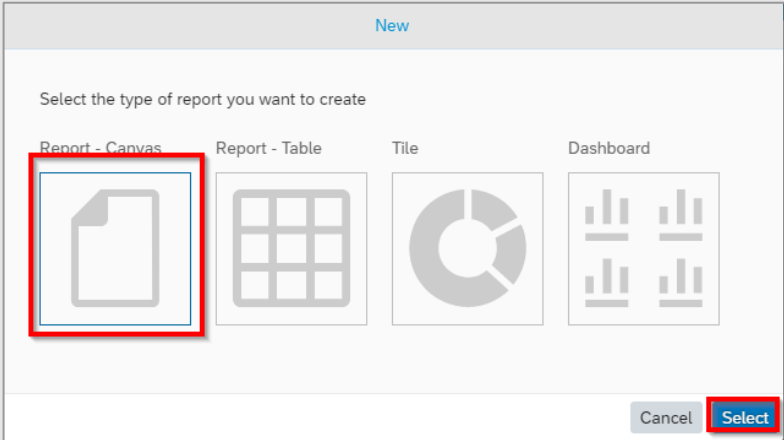
| 6.3 | Save entry
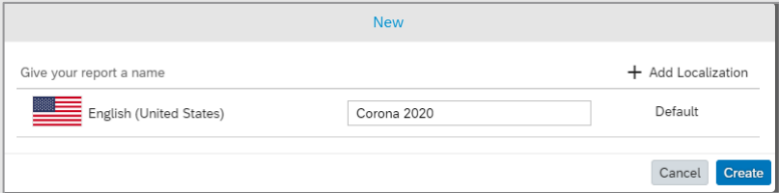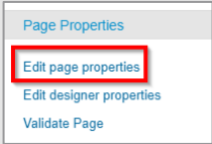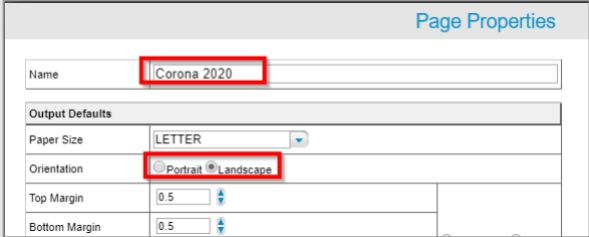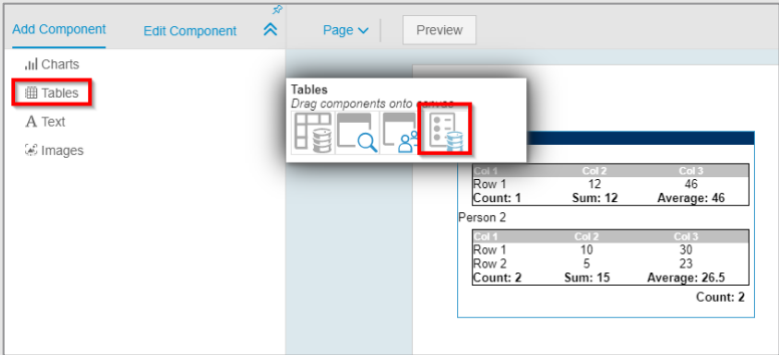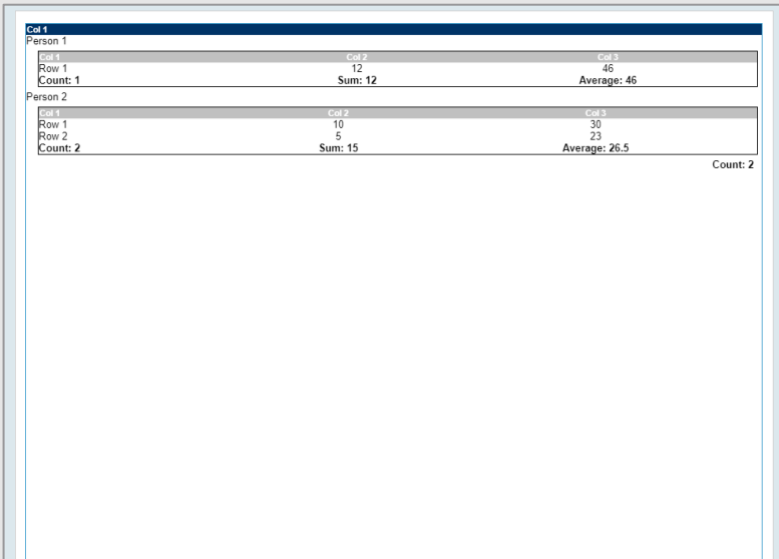
Note: Portlet is effective dated | |

EC Advanced Report

Step	Task	Description
7.1	Admin Center > Tools > OData API Metadata Refresh And Export Click Refresh	
7.2	Menu > Reporting	
7.3	Click New	
7.4	Click Report - Canvas Click Select	

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	
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)"	
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 | |
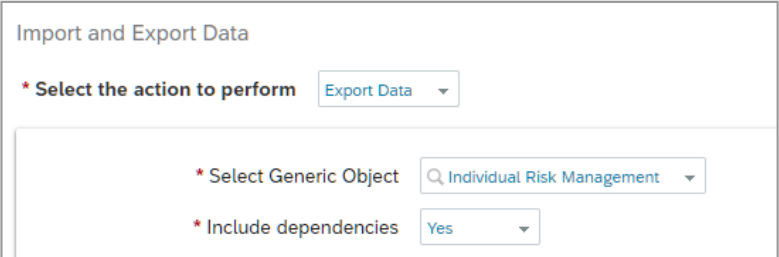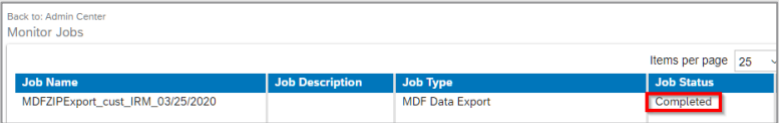
Extracting Data for Manual Report Creation

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	Data can be exported for manual report creation using Excel and VLOOKUPs Admin Center > Tools > Import and Export Data Action to perform = Export Data Select Generic Option = Individual Risk Management Include Dependencies = Yes Click Export	Import and Export Data * Select the action to perform — Export Data * Select Generic Object — Individual Risk Management * Include dependencies — Yes
8.2	Admin Center > Tools > Monitor Job Refresh screen until the export is complete	Back to: Admin Center Monitor Jobs Items per page 25 Job Name / Job Description / Job Type / Job Status MDFZIPExport_cust_IRM_03/25/2020 / / MDF Data Export / Completed
8.3	Scroll to the right and click the download link A Zip file will download Save file	Job Details / Download Status Download Status

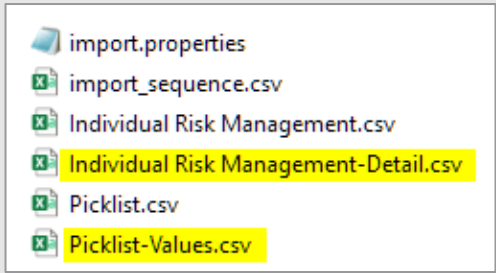|		
8.4	Extract the zip file Open files in Excel: Individual Risk Management-Detail.csv Picklist-Values.csv These 2 sheets contain the data needed to create reports	import.properties import_sequence.csv Individual Risk Management.csv Individual Risk Management-Detail.csv Picklist.csv Picklist-Values.csv

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