



Rsam Platform

Quick Steps to Create Activity Center

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About this Guide

Activity Center is a feature of Rsam Home Pages and available from version 10 onwards. Administrators can design Activity Centers to act as a central location from where end users can access information and navigate to pending tasks. This guide provides the steps to quickly configure an Activity Center, associate a widget, and grant access on it to an end user.

This document does not provide details on all options available when configuring Activity Centers. For detailed information, refer the *Rsam Online Help*.

Intended Audience

This document is intended for use by *Rsam Administrators* or those users responsible for configuring and maintaining Home Pages in Rsam.

Quick Steps to Create Activity Center

This section explains the steps involved to create an Activity Center, associate a Saved Search Results widget and grant user access to it. The steps are as follows:

1. [Creating a Saved Search](#)
2. [Create an Activity Center](#)
3. [Adding Saved Search Results widget](#)

Note: To complete this tutorial, few Rsam elements are used from the *Risk Register* module. If these elements are not available in your Rsam instance, you can use existing elements or create elements as required.

Creating a Saved Search

To create a saved search, perform the following steps:

1. Log in to Rsam as an *Administrator*.
2. Navigate to **Search > Saved Searches & Charts**.
3. Click **+ New Record Search**.
The **New Search** page appears.
4. Click **Search Criteria**.
The **Select Fields** dialog box appears.

Field Type	Field	Display Order	Field Filter
Record Fields	Record Category	1	
Record Fields	Record Type	2	
Record Fields	Record Workflow State	3	
Object Fields	Object Name	4	

Attribute Types: Sort alphabetically Limit to selected Object Types/Record Types and ancestors

Update Cancel

- Select the required filters.

The following table lists the values set to create a search for completing this tutorial.

Field Type	Field	Display Order	Field Filter
Record Fields	Record Type		Risk
Record Fields	Record Workflow State		GEN: Finding Open
Record Attribute	Risk ID	1	
Object Fields	Object Name	2	
Record Attribute	Date Risk Reported	3	
Record Attribute	Short Description	4	
Record Attribute	Root Cause	5	
Record Attribute	Universal Severity / Risk	6	

The following image shows the search criteria configuration.

Quick Search


Select Record Type ⌵

Field Type	Field	Display Order	Field Filter
Record Fields	Record Type		Risk
Record Fields	Record Workflow State		GEN: Finding Open
Record Attribute	Risk ID	1	
Object Fields	Object Name	2	
Record Attribute	Date Risk Reported	3	
Record Attribute	Short Description	4	
Record Attribute	Root Cause	5	
Record Attribute	Universal Severity / Risk	6	

- Click **Update** to save the criteria.
The dialog box closes and the search results appear.
- Click **Save** to save the search.
The Search Manager dialog box appears.
- Provide a name for the search and save it.

Create an Activity Center

To create an Activity Center, perform the following steps:

1. Open the left navigation panel by clicking  and select a home page.

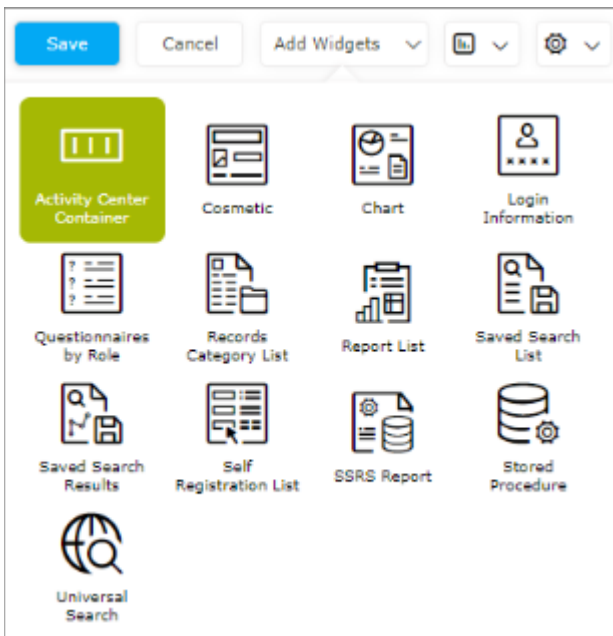
Note: Activity Center can be added to **Standard** and **Object Navigator** pages.

Also **Auto Adjust Layout** must be enabled to add Activity Centers on a page.

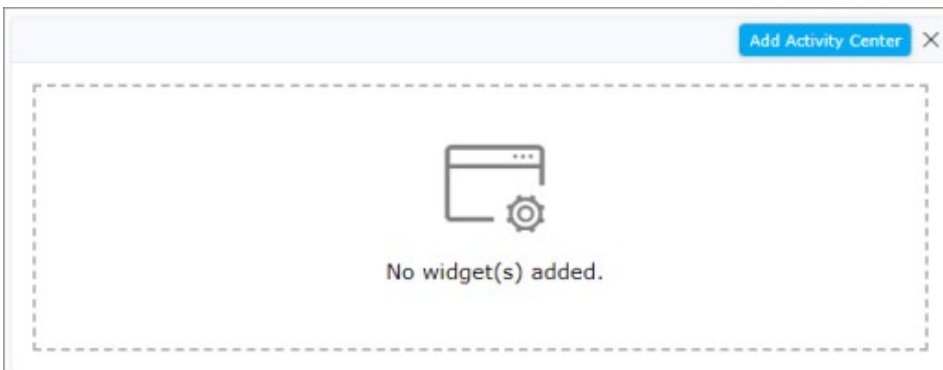
2. Click **Edit** button available at the top right corner of the page.
The page opens in the Edit mode.

Alternatively, you can navigate to the page from the Administration section (**Manage > Administration > Reports & Views > Home Page**), right-click the page name and select **Widget Arrangements**.

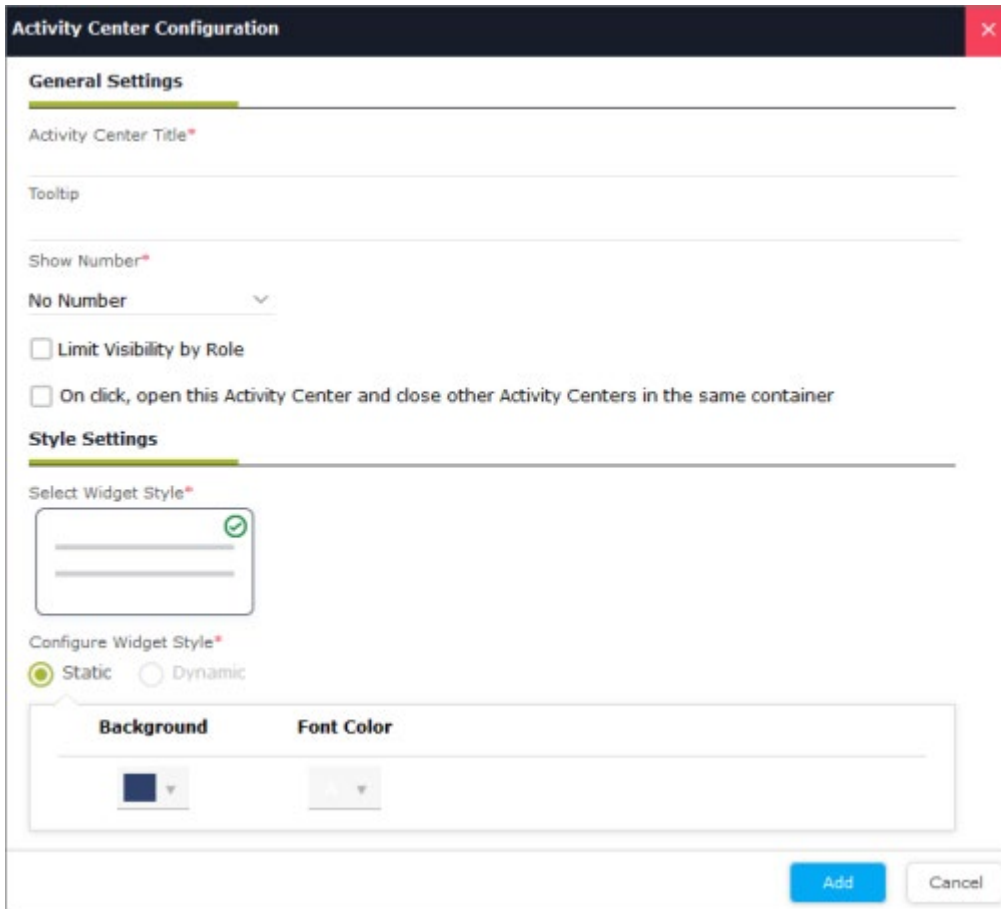
3. Click **Add Widgets > Activity Center Container**.



4. Drag and drop the container to a required area on the home page.
An Activity Center Container is added on the page.



- In the container, click **Add Activity Center**.
The **Activity Center Configuration** dialog box appears.



- Provide the values as listed in the following table.


Field	Value
Activity Center Title	Open Risks
Tooltip	Shows list Open risks
Show Number	Count
Select a Saved search for Numeric Value	Records:RR: BAC: Open Risks
Background (#)	b6d9fb
Font Color (#)	072138

- Click **Add** to add the Activity Center to the container.
The Activity Center is added and it displays the count of events from the saved search specified.



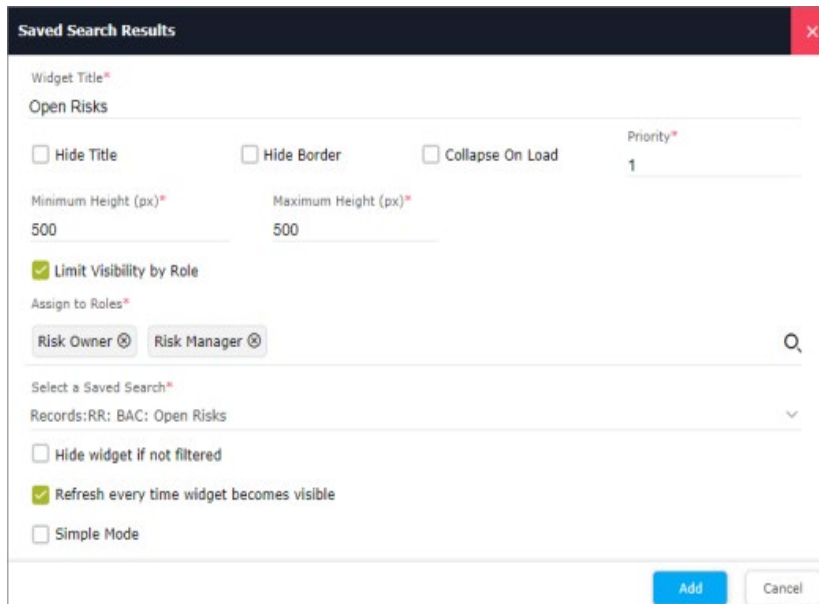
Adding Saved Search Results widget


To add a Saved Search Results widget to an Activity Center, perform the following steps:

1. Open the home page with the Activity Center in **Edit** mode and click  (**Add/Edit Widgets**). The Activity Center displays the widget area.
2. Click **Add Widgets > Saved Search Results** and drag and drop it to the widget area. The Saved Search Results widget properties dialog appears.
3. Provide values for the widget as listed in the following table.

Field	Value
Widget Title	Open Risks
Limit Visibility by Role	Select the check box
Assign to Roles <i>This ensures that only those users with these roles can view this widget.</i>	Risk Owner Risk Manager Note: Ensure that users with these roles are granted access to the home page where the Activity Center is configured.
Select a Saved Search	Records:RR: BAC: Open Risks
Refresh every time widget becomes visible	Select the check box

The following image shows the properties configured for the widget.



4. Click **Add**. The widget is added to the Activity Center. If you want to resize the widget, use the resize arrows () or set the values
5. Click **Update** to save the configuration for the Activity Center.
6. Click **Save** to save the configuration on the page.

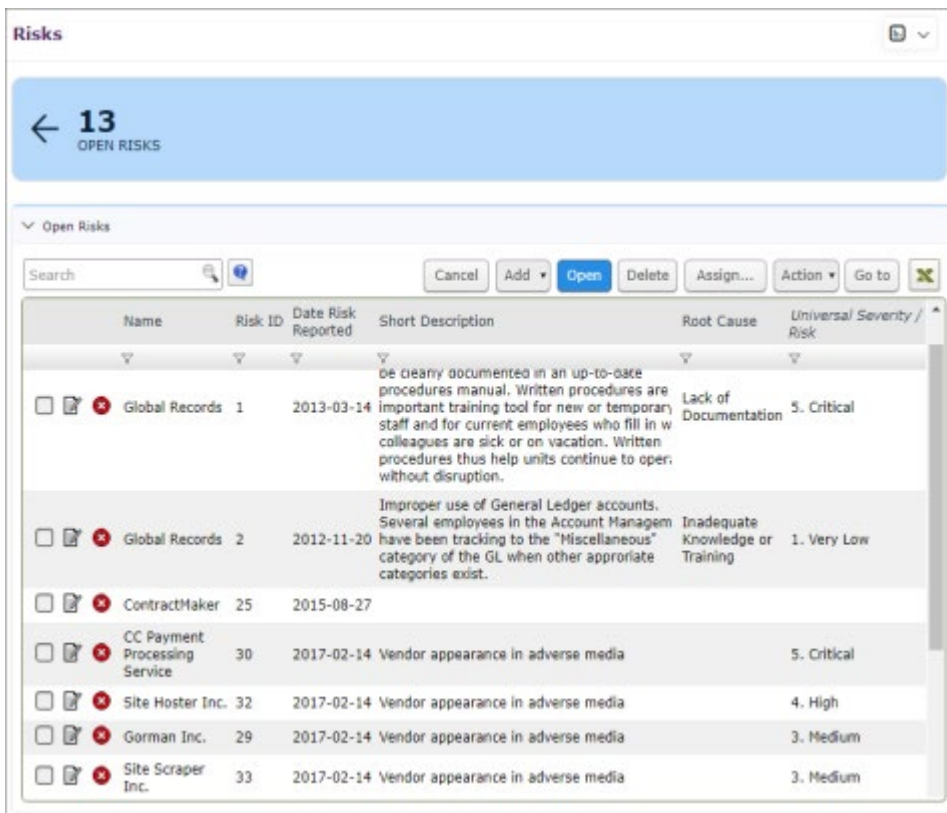
You can add more widgets to the Activity Center, as required.

View Activity Center and Widgets

Administrators can limit visibility of home pages as well as widgets on pages. Even if end users have access to a home page, they may not be able to view those associated widgets to which they are not granted access.

To view the Activity Center and widget configured in the previous section, perform the following steps:

1. Log in to Rsam as a user with *Risk Owner* or *Risk Manager* role.
2. Select the home page where the Activity Center is configured.
The page displays the Activity Center with the count.
3. Click the Activity Center to view the associated widget.
The Activity Center displays the associated Saved Search Results widget.



The screenshot shows a web interface titled "Risks" with a blue header bar indicating "13 OPEN RISKS". Below the header is a search bar and a toolbar with buttons for "Cancel", "Add", "Open", "Delete", "Assign...", "Action", and "Go to". The main content is a table of risk records.

Name	Risk ID	Date Risk Reported	Short Description	Root Cause	Universal Severity / Risk
Global Records	1	2013-03-14	Not clearly documented in an up-to-date procedures manual. Written procedures are important training tool for new or temporary staff and for current employees who fill in w colleagues are sick or on vacation. Written procedures thus help units continue to oper. without disruption.	Lack of Documentation	5. Critical
Global Records	2	2012-11-20	Improper use of General Ledger accounts. Several employees in the Account Managem have been tracking to the "Miscellaneous" category of the GL when other appropriate categories exist.	Inadequate Knowledge or Training	1. Very Low
ContractMaker	25	2015-08-27			
CC Payment Processing Service	30	2017-02-14	Vendor appearance in adverse media		5. Critical
Site Hoster Inc.	32	2017-02-14	Vendor appearance in adverse media		4. High
Gorman Inc.	29	2017-02-14	Vendor appearance in adverse media		3. Medium
Site Scraper Inc.	33	2017-02-14	Vendor appearance in adverse media		3. Medium

4. To navigate to any specific record, double-click the record or select the record and click **Open**.
The record opens.