Introduction

This reference guide is aimed at managers who will be responsible for managing users within RiskMan where RiskMan is not configured to use network logins. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from the *Help -> Reference Guides*

Note: Some of the naming conventions used in this document may not be the same as the ones in your RiskMan system; however the concepts will still apply

How do I access the User Profiles to create, modify or delete a user?

To create a new user you will need to navigate to the Administration -> User Permissions -> User Profiles page

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The User Profiles page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risk, Quality Activity; with an additional non-register specific tab called **General**. Depending on your permissions you may see all tabs or just some of these tabs

The **General** User Profile is used to assign User permissions and Restriction Details that are common across all Registers as well as the Administrative Permissions

The information under each of the tabs allows you to, create or modify a user and also to activate/de-activate a user for a particular register. Users that no longer work for your organisation are deleted under the **General** tab only. Below are the definitions of the sections that are included under the Register tabs:

- Filter fields Used to search for an active, deleted or expired user or users who have no permission under the specific Register User Profile e.g. Risk
- Login Details Used to enter the details of a new user or modify the details of an existing user
- Current/Pending Delegation Used to create a delegation on behalf of another user (this section will only display if the user has the appropriate permission)

- Restriction Details Used to restrict users' entry/ update or reporting of notifications/items/activities based on common fields throughout RiskMan e.g. Site/Region & Campus/Location restrictions
- Specific Restrictions (<u>not available</u> under the General and Feedback tabs) - Used to restrict users' entry/update or reporting of notifications/items/activities for a specific Register

Note: The Feedback User Profiles will have a Restriction Details section which will contain a combination of common and Feedback specific restrictions

- Field Settings (<u>not available</u> under the General tab) -Specify the status of a field e.g. Hide, Entry Required, Read Only, Optional Entry on a specific Register. Field Settings are usually dictated by the user's assigned template
- User Permissions Specify a user's permissions that are either common across all registers e.g. administrative permissions (this is done under the General tab) or specific to a Register. User Permissions are usually dictated by the user's assigned template

Clients who have a User Licence

If your organisation has a User Licence rather than a Site Licence you will be limited to the number of users that you can create in RiskMan.

If the number of users is close to the maximum or you have reached the maximum, the following message will appear at the top of your User profiles page.



If you have reached the maximum number of users you will be able to delete and modify existing user but <u>will not</u> be able to create a new user. You will have the option to purchase more licences by contacting RiskMan International Pty Ltd, or delete users that are currently not using RiskMan

How do I create a New User?

Users can be setup under any of the tabbed sections of the User Profile. However when you do create a user, depending on your RiskMan setup, a user may only be activated for specific Registers e.g. Incident & Feedback, but not activated under the Risk or Quality Activity Registers. All users will be activated under the **General** tab

Note: At this stage, users will always be activated under the Feedback Register until this Register is merged into the new format

Note: If you want to restrict the Registers that a user is automatically activated for, please contact RiskMan Support -<u>support@riskman.net.au</u>

In this guide, it will be assumed

- A user is always activated under the Incident & Feedback Registers but not under the Risk & Quality Activity Registers
- The person creating, modifying or deleting a user has access to all the Register and General User Profiles

Creating a User

If you do not have permission to all the Register & General User Profiles, a user can be created under one of the Register tabs or the General tab.

Where a user is automatically activated e.g. under the Incident, Feedback & General tabs, they will be assigned the **"Default"** template. This will give the user the minimum access to RiskMan

If you wish the user to be assigned a different template then you will need to move between the Registers & General tab to assign the appropriate template

If your role is to provide Administrative support to RiskMan then we suggest that you have permission to all the Register and General User Profiles

<u>General tab</u>

The General User Profiles only contains the

- User permissions that are common across all Registers
- The Restriction Details that are common across all Registers
- The Administrative Permissions
- 1. Under the General tab press the New User **0** button

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- 2. Enter the user's details in the Login Details 29 section
 - Username: Suggest using the same naming conventions as your network logins
 - Password: Your Administrator has the ability to set the complexity and expiration of passwords used for RiskMan Standard accounts if desired. The settings can be modified via *Configuration > Global Settings > Users > Password Management*. Please refer to the **Global Settings Descriptions** Document for a detailed explanation for configuring password complexity rules. Below is some additional information about RiskMan passwords:
 - You can opt for passwords never to expire in a User Profile. This will override any password expiration setting you have enabled in the Global Settings:

User Display Name:	System Manager
User Name:	Manager
Password:	••••••• Last Changed: 28 Feb 2014 12:06
Password Never Expire	s 🗌

- Passwords are case sensitive
- Password recovery is not possible; if a user has forgotten their password it will need to be reset
- You can force users to change their password when they log in for the first time:

Login Details	
User Display Name:	Lauren
User Name:	Lauren
	_
Do you want to change Password:	Last Changed:
Password Never Expires:	\checkmark
Force Change Password: 🍡	\checkmark

When this box is checked, the next time the user logs in to the system, they will be required to create a new password for their account before they can continue. This change is not controlled by any settings and will be applied automatically.

- Users can change their password if they want. However, if a user wants to change their password they cannot use any of their last 12 passwords. This change is not controlled by any settings and will be applied automatically.
- It is possible to add to the ability to prevent users from changing their password too frequently. When enabled, users will only be able to change their passwords once a day. This prevents users, when forced to change their password, from imediately changing it back. This is controlled by Global Settings (See Global Settings guide).
- It is possible to lock out users who enter the wrong username and password combination successive times. The number of times they can enter the wrong combination before lock-out is defined in Global Settings (See Global Settings guide).
- Email Address: It is advisable that all managers have an email address registered with their User Profile so they can receive email notifications from RiskMan
- This user's RiskMan User Type is Select the template the user will be assigned to. This is used

as a reference when templates are updated and changes are applied to all users on that template

 Reset fields to this type S: Select the template the user will be assigned to (this will be the same as the template selected under the This user's RiskMan User Type is field). The User permissions for that template will be updated

Note: All restrictions under the Restriction Details section will either need to be manually selected for that user, or will need to be applied through the "Apply Template Changes" option which will affect all users on that template - refer to the RiskMan User Templates Guide

- Start Page ④: A default start page (the page the user will be presented with when they first logon to RiskMan) may display depending on the assigned template. This can be changed if required
- If required, select the user's overall Restriction Details
 i.e. the restrictions that are <u>common</u> across all Registers. Once selected, they will be applied across all Registers
 - Entry/Update Restrictions: If the user can only enter or update Register specific notifications/ items/activities based on Sites and/or Locations, select accordingly. To select more than one item in a list hold your CTRL button and click on the list items

To view the Location restrictions

- Click on the Filter List button
 under the Location Restriction box
- In the pop-up window, select the Site 2 and press the Filter list 6 button
- The list of Locations will populate into the **Restriction Details 4** section
- Highlight as required (Hold CTRL key if you wish to select more than one Location)

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 Reporting Restrictions: If the user has access to running Register specific Reports, you can restrict their access to what they can view in the report based on any of the displayed fields.

To view the Location restrictions follow the steps described above under the Entry/Update restrictions

Note: Additional Entry/Update and Reporting Restrictions can be added under the Specific Restrictions section under each of the Register User Profiles. The Specific Restrictions section is not available under the General tab

4. To save the user, press Save User 6

Assign a Register Specific Template for the New User

Once the user has been created under the **General** tab, you will need to move between each of the other Registers to ensure the user has the correct permissions to the other Registers, where applicable.

The following pages describe setting up the new user under all the Registers that the user will have permission to access.

Note: Because RiskMan is configured according to the requirements of each client, the following scenario may not directly apply to you. It is likely that you will have fewer or more Registers than what is depicted in this User Guide.

Incident tab

Click on the Incident tab

 and the newly created user will be displayed (we have assumed the user is automatically active under this Register)

General Incident Quality Activity Risk Feedback

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- 2. Assign the appropriate Incident Template in the Login Details section
 - This user's RiskMan User Type is 2: Select the Incident template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template
 - Reset fields to this type ②: Select the same Incident template the user will be assigned to. The Incident fields, User permissions, Field Settings and any "Restrict to these Reports" and/or "Restrict to these Journal Types" restrictions for that template will be updated

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide**

 Start Page : If this was selected under the General tab it will also display here. If not, you can select a start page from this list.

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- Restriction Details (9: If the user does not have any Restriction Details then this section will be collapsed.
 - To expose the Restriction Details section click on the section.

(All restriction Details (All restrictions in this section are shared between all modules.)

 If the user has restrictions this section will be exposed. If you make any changes to these restrictions they will affect all Registers the user is active under (as these are the common restrictions)

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Administrative Services (E) Ambulatory & Community Servic	Allergy, Immunology & Respirat	Aged Psychiatry Services.

- 4. **Specific Restrictions (5)**: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and/or Journal Type Restrictions as required
 - Show Only "Alerted" Incidents in Inbox: This
 option should <u>only</u> be checked if the user has
 access to the Incident Inbox (e.g. Risk/Quality
 Managers) and should only see incidents they have
 been alerted to
 - Show Only "Alerted" Incidents in Reports: This option should only be checked if the user has access to the Incident Reports (e.g. Risk/Quality Managers, Executives, Line Managers) and can only report on incidents they have been alerted to
 - If you restrict the list of reports the user <u>WILL NOT</u> have access to the Incident Custom Report Builder on the Incident Reports page to create, modify or delete Custom Report Layouts
- 5. To save the user, press Save User @

Feedback Tab

Click on the Feedback tab

 and the newly created user will be displayed

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- Assign the appropriate Feedback Template in the Login Details section ② (refer to the description under the Incident Tab)
- Restriction Details

 In this version, there is no Specific Restrictions section. The Site & Location Entry/Update or Reporting restrictions will be carried across from all other Registers. In addition, on the Feedback User Profile, the following restrictions can be included
 - Show Only "Alerted" Feedback in Inbox: This option should only be checked if the user has access to the Feedback Inbox (e.g. Risk/Quality Manager, Consumer Advocate) and should only see feedback they have been alerted to
 - Show Only "Alerted" Feedback in Reports: This option should only be checked if the user has access to the Feedback Reports (e.g. Consumer Advocate, Risk/Quality Manager, Executives, Managers) and can only report on feedback they have been alerted to
- 4. To save the user, press Save User ④

<u>Risk Tab</u>

In our scenario, users are **<u>not</u>** automatically activated under the Risk Tab.

- 1. Click on the Risk tab **0**
- A message will display at the top of the page specifying that the user you have created does not have a record in the Risk Register User profile i.e. they are not activated under this Register 2
- 3. If you would like this user to be an active Risk Register user, press the **Save User ()** button

General Incident	Quality Activity Risk Feedback					
	User Profiles (Risk)					
This user does not have a record in this Register. Save this page to create one. 2 'Default' configuration loaded, edit as required.						
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 Assign the appropriate Risk Template in the Login Details section (a) (refer to the description under the Incident Tab)

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FISKMAN REFERENCE GUIDE TO USER MANAGEMENT (Non-Network Logins)

- 5. **Restriction Details (5)**: If the user does not have any Restriction Details then this section will be collapsed
 - To expose the Restriction Details section click on the section.
 - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
- 6. **Specific Restrictions ()**: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and Journal Type Restrictions as required
 - Show Only "Alerted" Risk Items in Inbox: This option should <u>only</u> be checked if the user has the following Management Permission: Can Review Entries in Inbox (e.g. Risk/Quality Managers, Executives) and should only see Risks they have been alerted to
 - Show Only "Alerted" Risk Items in Reports: This option should only be checked if the user has access to the Risk Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on risks they have been alerted to
 - If you restrict the list of reports, the user <u>WILL</u>
 <u>NOT</u> have access to the Risk Register Custom
 Report Builder on the Risk Reports page to create,
 modify or delete Custom Report Layouts
- 7. To save the user, press Save User 🔗

Quality Activity Tab

In our scenario, users are **<u>not</u>** automatically activated under the Quality Activity Tab.

- 1. Click on the Quality Activity tab **0**
- A message will display at the top of the page specifying that the user you have created does not have a record in the Quality Activity User profile i.e. they are not activated under this Register (2)
- If you would like this user to be an active Quality Activity user, press the Save User ⁽³⁾ button

General Incident Q	uality Activity Risk	Feedback
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RiskMan User Type Filter:		
User Position Filter:		
User Created After Date:		Include users with no Permissions in Search:
		Only show active users in search:

 Assign the appropriate Quality Activity Template in the Login Details section () (refer to the description under the <u>Incident Tab</u>)

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FISKMAN REFERENCE GUIDE TO USER MANAGEMENT (Non-Network Logins)

- Restriction Details

 If the user does not have any Restriction Details then this section will be collapsed.
 - To expose the Restriction Details section click on the section click on
 - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
- 6. **Specific Restrictions ()**: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and Journal Type Restrictions as required
 - Show Only "Alerted" Quality Activity Items in Inbox: This option should <u>only</u> be checked if the user the following Management Permission: Can review entries in Inbox (e.g. Risk/Quality Managers, Executives) and should only see Activities they have been alerted to
 - Show Only "Alerted" Quality Activity Items in Reports: This option should only be checked if the user has access to the Quality Activity Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on activities they have been alerted to
 - If you restrict the list of reports the user <u>WILL NOT</u> have access to the Quality Activity Custom Report Builder on the Quality Activities Reports page to create, modify or delete Custom Report Layouts
- 7. To save the user, press Save User 📀

How do I modify an existing user?

To modify an existing user, ensure you are on the Administration -> User Permissions -> User Profiles page

Modifications that can be done under any of the Register tabs where the user is active

- Modifying the user's Login Details: All the details under the Login Details section can be modified <u>except</u> for the Username. If you wish to modify the Username you will need to delete the User Profile and create a new one
- Creating or modifying a delegation for a user: This can be done under any Register tab where the user is active, provided you have the Administrative User Permission: Can modify other users Delegates under the General tab

 Modifying the Entry/Update and Reporting Restrictions under the **Restriction Details** section, as these are common across all Registers

Modifications that need to be done under the specific Register tab

- Changing the user's assigned template in the Login Details section
- Activating a user under a specific Register e.g. Risk or Quality Activity Registers
- Modifying the Entry/Update and Reporting Restrictions under the Specific Restrictions section as these are specific to a Register

It is <u>strongly recommended</u> that User Permissions and Field Settings are <u>not</u> modified under a specific User Profile, if the user is assigned to one of your main Templates e.g. Default, Manager, Executive, Risk Manager. This is because if any of these templates are modified and an "Apply Template Change" is done across RiskMan, the user's field settings and user permissions will be overwritten.

If the user is assigned a template where the users on this template have special needs that are dictated by their User Profile, then you can modify the user's individual field settings and user permissions. Ensure the template that these users are assigned to is **never modified**

Searching for a User

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General Incident Quality	CLIVILY KISK FEEDDACK	
	User Profiles (General)	
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Only displaying first 500 users @		
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RiskMan User Type Filter:	Only Show Expired Users:	
User Position Filter:	 Only Show Deleted Users: 	
User Created After Date:	Include Deleted/Expired Users in Search:	
User Created After Date:		

Under any of the Register or General tabs, locate the user

- 1. Select the user from the Select User **0** list or
- Enter filter criteria in one of the filter fields
 - Press "Rebuild 'Select User' List Now" 😣
 - Select the user from the Select User **0** list

Modifications: Template Changes & Specific Restrictions

- 1. Click on the specific Register tab **0** and locate the user
- Modify the Template changes in the Login Details 2 as required
 - This user's RiskMan User Type is: Select the template the user will be assigned to for the selected Register. This is used as a reference when templates are updated and changes are applied to all users on that template
 - Reset fields to this type: Select the same template as selected in the *This user's RiskMan User Type is* field. The User permissions, Field Settings and any "Restrict to these Reports" and/or "Restrict to these Journal Types" restrictions for that template will be updated

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide**

3. Modify the **Specific Restrictions ()** as required

4. Press Save User 4

		U					
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Example: Modifying a User under the Incident Register User Profile

Modifications: Login Details & Restriction Details

- 1. Click on the specific Register tab 1 and locate the user
- 2. Modify the Login Details 2 as required
 - All fields in the Login Details section can be changed except for the Username. This cannot be changed because the username can be linked to Register Items
 - Template changes should be done under the respective Register or General tab - refer to the section <u>"Modifications: Template Changes &</u> <u>Specific Restrictions"</u>

Note: Advise that you <u>do not</u> modify the field settings or the user permissions as these are controlled by the User Templates and could potentially be overwritten if the templates are modified

3. Modify the **Restrictions Details (3)** as required

4. Press Save User 4

			tivity Risk	Feedback
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Modifications: Adding or Modifying a Delegate for a User

If a Manager is on annual leave or not available to perform their RiskMan duties for a period of time you can

- Check to see if the Manager has already assigned a delegate and if not assign a delegate on their behalf; or
- Modify a manager's delegation if the selected delegate becomes unavailable e.g. on sick leave

To assign a delegate

- 1. Locate the user under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Press the Add Delegate 2 button
- Search for the delegate using the Filter icon and then select the user from the Delegate list ³
- Enter the delegation period ④ (End Date should be the date the user is returning)

6. Press Save 6

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Phone Number:							
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To modify/delete an existing delegate

- 1. Locate the User under any Register or the General tab
- 2. Press the Edit Delegation ¹ button
- 3. Double click the **Delegate's Name 2** in the list
- If you wish to modify the details of the delegate, make any respective changes and press Update ⁽⁵⁾
- 5. If you wish to delete the delegation press Delete 4

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Modifications: Activate a User under a Register

Users can be active under some Registers e.g. Incidents & Feedback but not necessarily active in other Registers e.g. Risk and Quality Activity. This will depend on how your system is setup.

All users will be active under the General & Feedback tabs

If a user is not active under a Register, then they can be activated as follows:

1. Click on the specific Register tab 0 e.g. Risk

	Risk Feedback			
General Incident Quality Activit	y Risk Feedback			
	User Pro	iles (Risk)		
Select Users 1066 Users found.	•	User Registry	Save User	ew User Delete User
User Name Filter:	🔿 Only S	how Users with no permissions i	in this register: Rebuild	Select User' List Now
RiskMan User Type Filter:	•			
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User Created After Date:	Includ	users with no Permissions in S	iearch:	
User Has Organisation* Restriction:	• Only s	iow active users in search:		

- 2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
 - Enter the user's first or last name in the User
 Name Filter ² field
 - Check the "Only Show Users with no permissions in this register" ⁽⁶⁾ option
 - Press the Rebuild Select User List Now 4 button

📚 🥹 My Workspace Mana	agement Administration Re	leports Help Log Out USER: System Manager (Manager)
General Incident 0	uality Activity Risk	Feedback
		User Profiles (Risk)
Select Useri 4 Users found.	•	User Registry Save User New User Delete User
User Name Filter:	david [2]	Only Show Users with no permission his register: Rebuild 'Select User' List Now
RiskMan User Type Filter:		•
User Position Filter:		•
User Created After Date:		① Include users with no Permissions in Search:
User Has Organisation® Restriction:		Only show active users in search:

- 3. Select the user from the Select User ⁽⁵⁾ list
- 4. Press Save User 6
 - A message will display to inform you that the User is now activated

т		User Profiles (Risk) a record in this Register. Save this page ' configuration loaded, edit as required.	to create one.
Select User: Binns, Di 4 Users f		User Registry Save User	6 New User Delete User
lser Name Filter: LiskMan User Type Fil Iser Position Filter:	david	 Only Show Users with no permissions in this register 	Rebuild 'Select User' List Now
iser Created After D		Include users with no Permissions in Search: Only show active users in search:	
ser Created After Di ser Has Organisation Login Details	* Restriction		on ks: Manager
ser Created After Di ser Has Organisation Login Details iser Display Namei	* Restriction:	Only show active users in search	
ser Created After Di ser Has Organisation login Details iser Display Namei Iser Name:	* Restriction	Only show active users in search:	pe is: CLO
ser Created After D. Ser Has Organisation Login Details Iser Display Name: Iser Name: Iser Name:	* Restriction: Sinna, David Format as (Lastname, Firstname) David Binna	Only show active users in search Only show active users in search This user's position This user's Rishtan User Ty	pe is: CLO type:
ser Created After D. ser Has Organisation Login Details iser Display Name: her Name: tassword: mail Address:	* Restriction: Sinna, David Format as (Lastname, Firstname) David Binna	Only show active users in search This user's post This user's post This user's distance target This user's distance target The search distance target	pe is: CLO type: ress:
ser Created After Di ser Has Organisation login Details liser Display Name: her Name: tassword: mail Address: thone Number:	* Restriction: Sinna, David Format as (Lastname, Firstname) David Binna	Only show active users in search This user's posit This user's posit This user's fields to this Admonts field Add Thisk work field Add Thisk work	pe is: CLO type: ress:
Jace Position Fatteri Jace Created After D. Jace Has Organisation Login Details User Display Name: User Name: Password: Email Address: Phone Number: Poolfie Duration:	Binna, David Format as (Lastname, Firstname) David Binns	Only show active users in search This user's posit This user's posit This user's fields to this Admonts field Add Thisk work field Add Thisk work	pe is: CLO type: mber:

 If required, modify the User's Profile as appropriate e.g. Assign the appropriate template in the Login Details section and press Save User ß

How do I delete a user?

Users can ONLY be deleted from the General tab

Note: In this version, users can also be deleted under the Feedback tab, however once Feedback is included in the new Register paradigm, users can then only be deleted under General tab

If you delete a user from any of the Register tabs it will **only de-activate** them from that specific Register

If you wish to delete a user who no longer works for your organisation then prior to deleting the user the following should be checked

- Does the user have staff reporting to them or they report to a manager? Check under the Administration -> Manager Staff -> Staff Hierarchy page and edit under the Administration -> Manager Staff -> Edit Staff page. Remove all relationships for that user
- Does the user have an alert assigned to them? Check under the Administration -> Alert Management page.
 Either remove the user from the allocated user list for that alert and assign a replacement, or delete the alert

To de-activate a user from a Register

(Note: Not applicable to the Feedback Register)

- Click on the specific **Register 1** tab e.g. Risk, Incident, Quality
- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields

 and
 Press "Rebuild 'Select User' List Now"

 Select the user from the Select User

3. Press Delete User 6

4. A **message (**) will display to let you know that this user has been deleted from this Register only.

General Incident Q	uality Activity Risk	Feedback
		User Profiles (Risk)
	 Undates to us 	er David Binns have been saved. 5
Select User: Binns, David (David Bin		User Registry Save User New User Delete User
15 Users found.		
User Name Filter:	david	Only Show Users with no permissions in this register: Rebuild 'Select User' List Now
RiskMan User Type Filter:		•
User Position Filter:		
User Created After Date:		Include users with no Permissions in Search:
User Has Organisation* Restriction		Only show active users in search:
Login Details		
cogin crecans		
User Display Name	14	
User Display Name: Binna, Dav		This user's position is: Manager
Format as	(Lastname, Firstname)	
Format as		
Format as	(Lastname, Firstname)	
Format as Uper Name: David Binn	(Lastname, Firstname) Secondbist address satisfies address	This weeks Richtline User Type in: CLO
Format as User Name: David Rinn	(Lastname, Firstname) Secondbist address satisfies address	
Ver Name David Binn	(Lastname, Firstname)	Planted Rolling Unit Yog Br. C.D
Ver Name David Binn	(Lastname, Firstname) Secondbist address satisfies address	This weeks Richtline User Type in: CLO
Ver Name David Binn	(Lastaame, Firsteame) gement Administration Rep Quality Activity Risk	Derts Heb Log Out USER: System Manager (Fordback
Ver Name David Binn	(Lastaame, Firsteame) gement Administration Rep Quality Activity Risk	Planted Rolling Unit Yog Br. C.D
Terret as Ver Neteri t 🕲 My Workspace Mana General Incident Q	(Lashanne, Firstanne)	Big track Rolling (per track) CO
Terret as Ver Neteri t 🕲 My Workspace Mana General Incident Q	(Latrame, Finitane) gement Administration Reg Quality Activity Risk wid Binns' for registe	ports Hep Log Out USER: System Navager (Feedback User Profiles (Risk) V Risk has been marked as deleted (not physically deleted)
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Connect as Connect Connect as Connect as Connect as Conn	(Latitane, Firitane) gement Administration Reg Quality Activity Risk wid Binns' for register and car	Teochad User Profiles (Risk) Trisk has been marked as deleted (not physically deleted) The trask as been marked as deleted (not physically deleted) The restrict of the there The there is the there The the the there The t
Concernant as Concernant and Concernant Incident Concernant Incident Concernant Concernation	(Latrame, Finitane) gement Administration Reg Quality Activity Risk wid Binns' for registe	Topologic Content of the second
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Concernant as Concernant and Concernant Incident Concernant Incident Concernant Concernation	(Latitane, Firitane) gement Administration Reg Quality Activity Risk wid Binns' for register and car	ports Help Lag Oxt USER. System Nanager (Feedback User Profiles (Risk) ar Risk has been marked as deleted (not physically deleted) n be restored if necessary.
My Workspace Mana General Incident C The User Profile 'Da Salet User User Name Fifer Nakisha User Yape Film:	(Latitane, Firitane) gement Administration Reg Quality Activity Risk wid Binns' for register and car	Configuration of the second seco
Comments	(Latane, Frietens) Bandhi dir, and exactly the genent Administration Reg Justifty Activity Risk wid Binns' for registe and car david	ports Help Lag Out USER: System Nanager (Foodback USER Forfiles (Risk) In be restored if necessary. Outy these Users with no permissions in this register. Tabular Tabular (Outy these users are permissions in this register. Tabular Solutions

To delete a user from RiskMan

Deleting a user from RiskMan can only be done via the General tab

Note: Deleting a user can also be done from the Feedback tab until the Feedback User profiles becomes part of the other Register paradigm in a future release

1. Click on the General **0** tab

	User Profiles (General)	6
Select Useri Binns, David (David Binns) 2 18 Users found.	v User Registry Save User New User De	elete User
User Name Filters David	4 Rebuild 'Select User' List Now	
RiskMan User Type Filter:	Only Show Expired Users:	
User Position Filter:	Only Show Deleted Users:	
User Created After Date:	Include Deleted/Expired Users in Search:	
User Has Campus [®] Restriction:	 Exclude Deleted/Expired Users from search: 	

- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields ⁶ and Press "Rebuild 'Select User' List Now" ⁴. Select the user from the Select User ² list
- 3. Press Delete User (5)

If the user has **<u>not used RiskMan</u>** they will be deleted from the database.

General Incident	Quality Activity Risk	Feedback	
	L	Jser Profiles (General)	
	The User Prof	file 'David Binns' has bee	n deleted.
Select Useri 17 Users found.	•	User Regist	
User Name Filter:	David		Rebuild 'Select User' List Now
RiskMan User Type Filters		Only Show Expired Users:	
User Position Filter:		Only Show Deleted Users:	
User Created After Date:		Include Deleted/Expired Users in Search	
User Has Campus* Restriction:	-	Exclude Deleted/Expired Users from sea	irchi

General Incident	Quality Activity	Risk Feedback		
peneral incident	Quality Activity			
		User Profiles (G	ieneral)	
	The Us	er Profile 'anne' has	records in Ris	skMan.
n order not to los	e the historical	record it has been n	andread are dealed	eted (not physically deleted), and
				eted (not physically deleted), and
elect User:		can be restored if	necessary.	
				Save User New User Delete User
elect User: 17 Users found.	•		necessary.	Save User Delete User Delete User
elect User: 17 Users found. User Name Filter:		can be restored if	User Registry	
elect User: 17 Users found.	•		User Registry	Save User Delete User Delete User
elect User: 17 Users found. User Name Filter:	•	can be restored if	User Registry	Save User Delete User Delete User
elect User: 17 Users found. User Name Filter: RiskMan User Type Filter:	•	can be restored if	User Registry	Save User Delete User Delete User

If the user **<u>has used RiskMan</u>** then their user profile will be flagged as deleted and can be restored if required.

How do I restore a deleted user?

If a user was been deleted from RiskMan from the **General** tab and their User Profile was flagged as deleted, it will need to be restored under the **General** tab and then restored under each of the other Register tabs as required

Note: Users will automatically be activated in the Feedback User Profile

To restore a user that was flagged as deleted from <u>RiskMan</u>

- 1. Click on the **General 0** tab
- In the Filter Criteria section check "Only Show Deleted Users" ②
- 3. Press the Rebuild 'Select User' List Now ⁶ button
 - The Select User ④ list will now show all users who have been flagged as deleted. Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users



4. Press the Undelete User ⁶ button

General Incident Quality	Activity Risk Feedback	
	User Profiles (General)	6
ielect Useri anne (anne) v		User Registry New User Undelete User
User Name Filter:		Rebuild 'Select User' List Now
RiskMan User Type Filter:	Only Show Expired Users:	Repair and One Litt New
User Position Eilter	Only Show Deleted Users:	
User Created After Date:	Include Deleted / Expired Users in Sear	arb:
User Has Campus ⁺ Restriction:	O Exclude Deleted/Expired Users from s	

- The User is now restored ⁽³⁾ under the General & Feedback tabs
 - If there are no changes to the user's profile, it will not be necessary to press the Save User button
 - If you wish to make changes to the user's profile, modify as required and press Save User
- Repeat steps 2 5 under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

	User Profiles (General)	
	6 User Undeleted.	
elect User: anne (anne) 👻		elete User
User Name Filter:	Rebuild 'Select User' List Now	
RiskMan User Type Filter:	Only Show Expired Users:	
User Position Filter:	 Only Show Deleted Users: 	
User Created After Date:	O Include Deleted/Expired Users in Search:	
User Has Campus ⁺ Restriction:	O Exclude Deleted/Expired Users from search:	
Login Details		

To reactivate a user under a specific Register

Note: This does not apply to the Feedback Register

- 1. Click on the specific **Register** tab e.g. Risk, Incident, Quality
- 2. In the Filter Criteria section check the **"Only Show** Users with no permissions in this register" option
- 3. Press the Rebuild 'Select User' List Now button
 - The **Select User** list will now show all users who do not have permission to the selected Register
 - Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users

- 4. Press the Undelete User button
- 5. The User is now activated under the selected Register
 - If there are no changes to the user's profile, it will not be necessary to press the Save User button
 - If you wish to **make changes** to the user's profile, modify as required and press **Save User**

Modifying the Field & Section Labels/Colours on a Register Form

The label of a Field or Section Name and the background

colour of a Section can be modified if the following icon appears in front of the Label

A Who Was Affected?	
La Incident Involved	Entry Required 👻
& First Name	Entry Required 👻
& Surname	Entry Required 👻
Browne Right war and a second second	- Beauired -

Example: Fields on the Incident Entry form

To be able to modify the label of a field or background colour of a section on a Register form

- The user requires the following Administrative
 Permission under the General tab: Can Modify Global
 Settings
- A user profile needs to be open in the respective Register
- 1. Click on the respective **Register 0** tab
- 2. Select any user from the Select User 2 list

nistration Reports Help Log Out	USER: System Manager (Manager)
ivity Risk Feedback	
User Profiles (Incident)	
• User Regi	stry Save User New User Delete User
Only Show Users with no permis	sions in this register: Rebuild 'Select User' List Now
 Only Show Users with no permis 	sions in this registers Rebuild 'Select User' List Now
 Only Show Users with no permis 	sions in this registern Rebuild 'Select User' List Now
Only Show Users with no permis Only Show Users with no Permissio Only Show Users with no Permissio	
	Vity Risk Feedback User Profiles (Incident)

To modify a field label

1. Click on the 4 icon 1 next to the respective field

0 A Sur	nmary	<u></u>		Entry Required 👻	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
di Del	tails		<u>محمد معمر</u>	Optional Entry 👻	
Edit Config	uration Webpage Dialo	g	Edit Field Titles		«
			Luit field files		
Current Title Tablename	Text	Summary			
Tablename Fieldname		main Description			
New Title Te	xt	Summary	2		
New Reporti	ng Title	Summary	ð		
Alert Title		Summary	Ă		=
	the entry page. If unsure, o This field may also contain	n special HTML fo ontact RiskMan. certain values lik	ormatting, or other code. Care need be tak e '*GS_SomeName'. These refer to Global	an when changing such fields. Altering them can 'break' Settings naming values. If unsure, contact RiskMan.	
Reporting Title	This is the value displayed need to be selected in isola	when selecting an tion e.g. there ma	nd displaying fields for reporting. This may vy be several 'Other' fields used for differer	need to be more distinct than the Title Text, as it will it purposes.	
Alert Title	This is the value displayed in isolation e.g. there may l	when selecting fie e several 'Other'	elds in Alerts. This may need to be more di fields used for differnt purposes.	stinct than the Title $Text,$ as it will need to be selected	
Save Car	ncel				

- 2. Enter the label in the **New Title Text 2** field (*this is the field on the respective Register form*)
- The new title should be reflective in the Reports and Alerts, so modify the New Reporting Title ③ and Alert Title ④ fields accordingly
- 4. If your Entry form has more than one label with the same name, ensure the labels for the Alert Title and Report Title are such that users are able to distinguish which Entry form label the field is referring to (refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)

A Key Personnel			
BReported By BAccountable Executive BResponsible Manager BClosed By	Optional Entry	Reported to RNotify of Associated Incidents RNotify of Associated Incidents	Optional Entry V Optional Entry V
Edit Configuration Webpage Dia	log		×
	-	dit Field Titles	
Current Title Text Tablename Fieldname New Title Text	Notify of Associated RiskReg1 RRNotifyLvl1OfAI Notify of Associated		
New Reporting Title	Notify Accountable 8	Executive of Associated Incident	
Alert Title	Notify Accountable 8	Executive of Associated Incident	
This may potentially con the entry page. If unsure This field may also conta Reporting Title This is the value display	, contact RiskMan. in certain values like '*GS_S ed when selecting and display	, or other code. Care need be taken when changing such iomeName'. These refer to Global Settings naming value ving fields for reporting. This may need to be more distin	s. If unsure, contact RiskMan.
Alert Title This is the value display		aral 'Other' fields used for different purposes. erts. This may need to be more distinct than the Title Te ed for differnt purposes.	ext, as it will need to be selecte
Save Cancel		11	

Example: "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form

	Edit Field Titles			
Current Title Text	Notify of Associated Incidents			
Tablename	RiskReg1			
Fieldname	RRNotifyLvl2OfAI			
New Title Text	Notify of Associated Incidents			
New Reporting Title	Notify Responsible Manager of Associated Incidents			
Alert Title	Notify Responsible Manager of Associated Incidents			
This may potentially con the entry page. If unsure, This field may also conta Reporting Title This is the value displays	ed as the field label on an entry form. sin special HTM Lomating, or othere code. Care need be taken when changing such fields. Altering them can "break constart fiskMan, in certain values like " 605_SomeName". These refer to Global Settings naming values. If unsure, contact RiskMan, do when selecting and displaying helds for reporting. This may need to be more distinct than the Title Text, as it will labion og, there may be severe? 10 CMF telds used for different purposes.			
	ad when selecting fields in Alerts. This may need to be more distinct than the Title Text, as it will need to be selected y be several 'Other' fields used for differnt purposes.			

Example: "Notify of Associated Incidents" referring to the Responsible Manager on the Risk Entry form

 If a field label is determined by the Global Settings e.g. Site, Location, Program; the Title Text, Report Title and Alert Title will be displayed in a similar way to that in the example below of the "Site" field

		Edit Field Titles	
Current Title	Text	*GS_SiteName	
Tablename		main	
Fieldname		Site	
New Title Tex	t	*GS_SiteName	
New Reportin	ng Title	*GS_SiteName	
Alert Title		*GS_SiteName	
	This may potentially contain s the entry page. If unsure, cont	he field label on an entry form. pecial HTML (branating, or other code. Care need be taken when changing such fields. Altering them can 'break' sct RiskMan. tain values like " [™] CS_SomeName'. These refer to Global Sattings naming values. If unsure, contact RiskMan.	
		en selecting and displaving fields for reporting. This may need to be more distinct than the Title Text, as it will	
Reporting Title		n e.g. there may be several 'Other' fields used for different purposes.	
Reporting Title Alert Title	need to be selected in isolatio This is the value displayed wh		

 If you make a change to any of these labels, it will only affect the label on that Register Entry form and will <u>NO</u> <u>LONGER</u> obey the Global Settings label. An example where this may be useful

Global Settings = Site where Incident Occurred

This would be useful on the Incident Entry form but not on the Risk Register, Feedback Entry or Quality Activity form. You might want to call this field

- Site of Risk in the Risk Register
- Site on the Quality Activity form
- Site where Feedback is initiated in Feedback*

8. Press Save when complete

*Note: Editing fields for the Feedback Entry form can only be done via the Feedback Global Settings. Select Administration -> Configuration -> Feedback Global Settings and click on the Naming Conventions tab. Some of the field labels are editable directly under this tab and the rest are editable by clicking on the Open Editor button (refer to example below). Ensure you change the respective Alert and Report label if you change the Form Label

						USER: System Manager (M
Incidents	s Feedback					Save Change
		Global Settin	gs (Feedbac	k)		
Administrat	tion Color Schemes	Naming Conventions	Scheduled Joi	bs	Program Functionality	Mail
Naming Co	onventions		_			
Feedback Field Lab				Open Ed	litor	
1. What name to u	use for Consumer "Admission Date"?			ate of to	Imission	
2. What name to u	ise for Consumer "Discharge Date"?		D	ate of D	scharge	
3. What name to u	ise for Consumer "Contact Status"?		0	ions. Stat	tus	
4. What name to u	se for Complainant "Contact Status"	7	0	omp. S	itus	
Note: Choosing	"Self" as the R'ship to Consumer wi	I auto select the Consumer "Conti of Status" list	act Status" from the			
	to use for Complainant "Act on behal		н	as Cons	umer Permission?	
6. What question t	to use for Complainant "Act on behal	f (Access Medical Info)" permissi	in? Pr	ermiasie	n to access medical info?	
7. What name to u	ise for "Date of First Formal Respon	se"?	D	ate Firs	Formal Response	
9. What name to u	ise for "Outcome"?		0	utcome		
9. What name to u	use for "Outcome Notes"?		0	utcome	liotes	
Field Label	l Editor Webpage Dialo	9	-			
Field Label	Editor Webpage Dialo	9 Field Lat	oel Edito	r V	7	
. To edit a f	This page allo field label, click the labe to tick "Save Changes"	Field Lal ws you to change the l l in the column, Form L before clicking the "Cl	abels for Feedl	back f	or Alert Label. It will	
. To edit a f . Make sure Drag a colum	This page allo field label, click the labe e to tick "Save Changes" nn header here to group	Field Lal ws you to change the I l in the column, Form L before clicking the "Cl by that column.	abels for Feedl abel, Report Li ose" button at	back f	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colum ype	This page allo field label, click the labe e to tick "Save Changes" nn header here to group Location	Field Lal ws you to change the I l in the column, Form L before clicking the "Cl by that column. Field Name	abels for Feedl abel, Report Li ose" button at Form Label	back f abel o the bo	or Alert Label. It will	
. To edit a f . Make sure Drag a colum	This page allo field label, click the labe e to tick "Save Changes" nn header here to group	Field Lal ws you to change the I l in the column, Form L before clicking the "Cl by that column.	abels for Feedl abel, Report Li ose" button at	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colun ype Jutton	This page allo field label, click the labe e to tick "Save Changes" nn header here to group Location	Field Lal ws you to change the I l in the column, Form L before clicking the "Cl by that column. Field Name	abels for Feedl abel, Report Li ose" button at Form Label	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colun ype Button Button	This page allo field label, click the labe to tick "Save Changes" nn header here to group Location Actions	Field Lal ws you to change the I I in the column, Form L before clicking the "Cl by that column. Field Name CompleteAction	abels for Feedl abel, Report Li ose" button at Form Label Action Comple	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colum ype	This page allo field label, click the labe to tick "Save Changes" nn header here to group Location Actions Actions	Field Lat ws you to change the I I in the column, Form L before clicking the "CI by that column. Field Name CompleteAction AddAction	abels for Feedl abel, Report Li ose" button at Form Label Action Comple Add Action	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colun ype Sutton Sutton Sutton Sutton	This page allo field label, click the labe a to tick "Save Changes" nn header here to group Location Actions Actions Actions	Field Lat ws you to change the I lin the column, Form 1 before clicking the "Cl by that column. Field Name CompleteAction AddAction CancelAction	abels for Feedl abel, Report Li ose" button at Form Label Action Comple Add Action Cancel	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.
. To edit a f . Make sure Drag a colum Type Sutton Sutton Sutton	This page allo field label, click the labe to tick "Save Changes" nn header here to group Location Actions Actions Actions Actions	Field Lab ws you to change the I I in the column, Form L before dicking the "Cl by that column. Field Name CompleteAction AddAction CancelAction ActionJournal	abels for Feedl abel, Report Li ose" button at Form Label Action Comple Add Action Cancel Journal Action Save	back f abel o the bo	or Alert Label. It will ottom of this page.	become editable.

To modify a Section Title/Colour or Background Colour

1. Click on the 🌌 icon 🛛 next to the Section Title

d Dates 1	میں میں میں میں میں اور اور اور میں میں میں میں میں میں میں اور
Admission Date	Dont Display 🗸
lIncident Date	Entry Required 👻
Notification Date	Dont Display 🗸
Date Closed	Dont Display 🚽

2. Modify the label in the **Current Section Title 2** field (*this is the field on the respective Register form*)

Note: If the title starts with *GS_ it means that the label is coming from the Naming Conventions in the Global Settings. If the label is changed it will not be affected by future Global Setting changes and will only affect that Register

Edit Configuration Webpage Dialog	en Die eine de la company d	-
	Edit Field Titles	^
Current Section Title	*GS_DatesSectionName	11
New Section Title	*GS_DatesSectionName 2	
Background Colour	#997788	
Choose Background Colour		=
Text Colour	#FFFFF	
Choose Text Colour		
	'Section' on the entry form. Sections usually contain related values.	
Background Colour The background colour use	d for the entire section.	
Foreground Colour The text colour used for th most suitable.	e entire section. It is recomended that this contrast with the background colour. Usually Black or White is the	
Save Cancel		
		-
< [m	

 To change the background colour and text colour of the section click on the respective Choose Background Colour ⁽²⁾ or Choose Text Colour ⁽²⁾ buttons and a colour picker will display. Select your colour. If you want the colours to be the same as another section, copy the respective Colour code e.g. #997788 from one section to the other

Note: If you want Black text enter the colour code **#000000.** Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support - support@riskman.net.au

4. Press Save when complete

d Dates	ער מאמש אב הערוב האינות אינות אינו אינו אינו אינו אינו אינו אינו אינו	~-、
Admission Date	Dont Display 👻	
6Incident Date	Entry Required 👻	
Notification Date	Dont Display 🗸	
Date Closed	Dont Display 👻	

Example: "Dates" section after changing the text and background colours

How can I view a summary listing of all the users in RiskMan?

The **"User Registry"** page provides you with a summary list of all registered users in your RiskMan. Depending on any Entry/Update restrictions you have in your User Profile, you will only be able to view users that match your restrictions

To access the User Registry page either

 Click on the User Registry button at the top of any of the User Profiles pages or select Administration -> User Permissions -> User Registry from the menu

General Incident Quality	Activity Risk Feedback	
Selleral Incluence Quality /		
	User Profiles (General)	
elect User: Hayden, Anne (abayden)	User Registry	Save User New User Delete User
1148 Users found. Only displaying first 500 users 10		,
Only displaying first 500 users 😥		
		tehuild 'Select User' List Now
User Name Filteri		
User Name Filteri RiskMan User Type Filteri	Only Show Expired Users:	
RiskMan User Type Filter:	Only Show Expired Users	

The list of users you have permission to view (this could be all users or users matching your Entry/Update Restriction Details) will be listed. These users may be grouped by a column (depending on the last time you visited this page) or ungrouped

International Distribution Statute Distribution

Display Option Definitions

- Show Columns: Uncheck the columns that you do not want displayed in your list. Some columns will always display and therefore will not be an option to hide
- **Display:** Select the type of users that you wish to display in your list ie. Deleted Users, Expired Users, Active Users
- Expand: Click this button if you wish to view all the users in your list if the list is collapsed. Alternatively if you only wish to expand a specific group of users, click on the H button next to the collapsed group of users
- Collapse: Click this button if you wish to collapse an expanded list of users that have been grouped.
 Alternatively if you only wish to collapse a specific group of users click on the button next to the expanded group of users
- To export your list to Excel[™] click on the Export button

<u>User List</u>

The following is a list of options available in the User List

• Username link: If you click on the <u>username</u> it will direct you to the User profiles page. This is useful if you wish to make an alteration to a specific user profile e.g. correct an email address, delete (from the General tab) the user as they are no longer employed, change the user's template in one or more Registers

To then return to your **User Registry** page, click on the **User Registry** button at the top of any of the User Profile tabbed sections

Email Address Link: If you wish to send an email to a
particular user, click on the user's respective <u>email</u>
<u>address</u> link. An email will open with the email address
auto-populated ready for you to send an email

Suggested Groupings for your User Profile List

The list of users can be grouped by any of the column headings – *refer to examples below*

1. **Templates** – Indicates the General or Register specific Template a user is assigned to.

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Example: Users grouped by their assigned Feedback Template.

Email Domain – Checks that users have entered the correct domain for their email address (the details after the "@" symbol e.g. @riskman.net.au) and highlights to you if users have entered an email address outside your organisations domain e.g. @hotmail.com or entered an incorrect domain for your organisation

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	Medibank						
	RiskMan User						
	Line Manager						
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-	domain: @cpl,com.au						
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-	domain: @riskman.net						
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-	domain: @riskman.net.au						
	Anne Hayden						
	Simon						
	chrissyn						
	Scott Esler						
	anneh						
	Lauren						
	default						
-	domain: @softwaredesign.com.au						
	Brett						
-	domain: @test.com						
	tuser						

3. **Display Name** – Checks to see if a user has more than one logon in RiskMan



How do I assign staff to Managers?

Refer to the **RiskMan Manager/Staff Relationships Guide** accessible via the menu *Help -> Reference Guides*