

Release Notes

For RiskMan Version 16.02

Last reviewed Apr 2017



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Introduction

This document provides an overview of new features, and enhancements to existing features, included in RiskMan version **1602**. The previous released version of RiskMan was 1601.

This document does not include corrections, improvements, bug fixes, and other “invisible” changes made to the back end of the system, however an exhaustive list of these modifications can be found by navigating to *Help > Release History*.

Should you have further questions about the content of this document, please contact RiskMan Support on **+61 3 9686 5456**, or via email: support@riskman.net.au.

If you would like to enquire about formal training for any of the features listed in this document, please contact the training team on **+61 3 9686 0009**, or via email: training@riskman.net.au.

New Features

New features are rated on a scale of 1 to 3 by their significance, and need for training. This rating system is designed to provide you with a simple method for identifying the impact the introduction of a new feature might have if you elect to use it.

Significance Scale Explanation

● ○ ○	A small or simple feature which makes using the system easier
● ● ○	A significant feature; might be used by a select group of your users
● ● ●	A major feature which greatly enhances the system, OR is a complete re-write of an existing feature

Need for Training Scale Explanation

● ○ ○	Users may only need to be told the feature is there; intuitive and simple, generally no training required
● ● ○	A feature that will likely require internal training to ensure proper use, or you might learn it yourself
● ● ●	A feature which is more involved and is likely to require RiskMan training in its proper use

Note

All new features introduced in a new version of RiskMan are turned OFF by default, unless stated otherwise.

The following is a summary of the new features introduced in RiskMan version 1602.

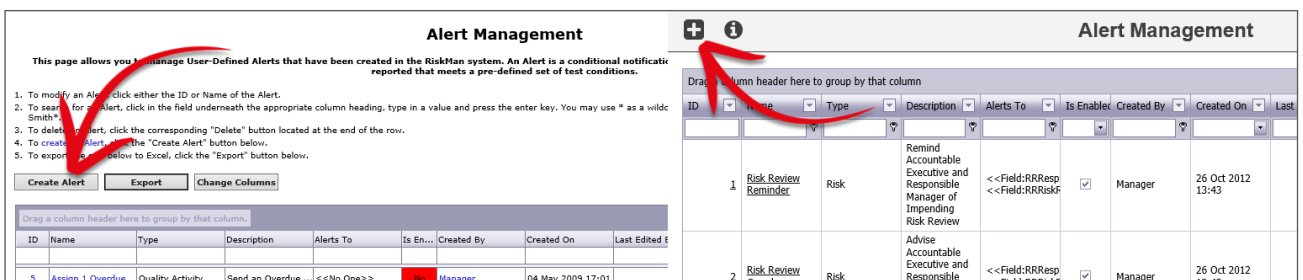
Alerts Version 2

Significance: ● ● ● **Need for training:** ● ● ○

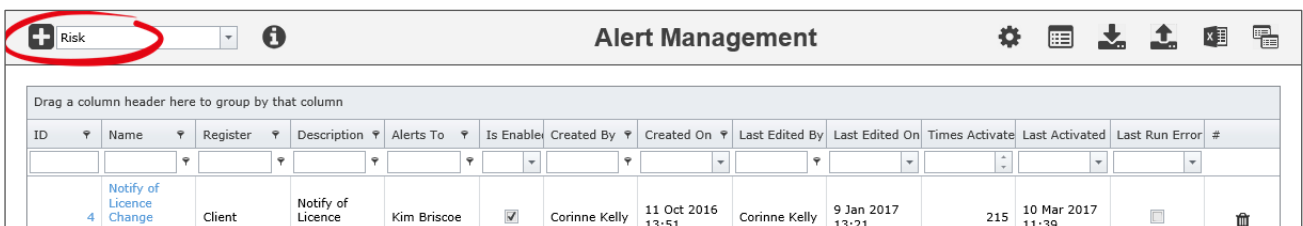
Alerts have always been one of the most important facets of your RiskMan system. However, until now, the alert creation screen has not been the most intuitive or user-friendly experience. In this version of RiskMan, we have introduced Alerts V2, which is a complete rewrite of alerts, both from a technical and end-user perspective.

Key points:

- **Alerts V2 does not replace the original Alerts.**
Due to Alerts V2 being a complete rewrite, Alerts V2 will sit alongside original Alerts.
- **All the existing functionality of original Alerts has been replicated in Alerts V2.**
If you elect to start using Alerts V2, you can rest assured that you will be able to do exactly the same things as you have done with your original alerts.
- **If a user has permission to original Alerts, they will also be able to see Alerts V2.**
There are two separate menu options, but they are both connected to the register-specific permission “Can manage alerts”.
- **At this point, there is no migration pathway to import your alerts from V1 to V2.**
We understand that many of you will have a lot of alerts in your system already (some clients have many hundreds or more!). Unfortunately, due to the complex technical differences between the old and new features, we currently don’t have the ability to migrate your existing alerts to the new version. We envisage that many clients will keep using Alerts V1 as-is, and use Alerts V2 for any new alerts going forward (in particular to utilise the new features we have included in Alerts V2). Having both versions of Alerts operating in tandem in your system will not affect system performance.
- **The “Alert Management” page remains the same as it was in the previous version, with one difference**
In Alerts V1, in order to create a new alert, you were able to click either “Create Alert” (older system versions), or the “Add” icon in the toolbar (newer system versions), as shown here:

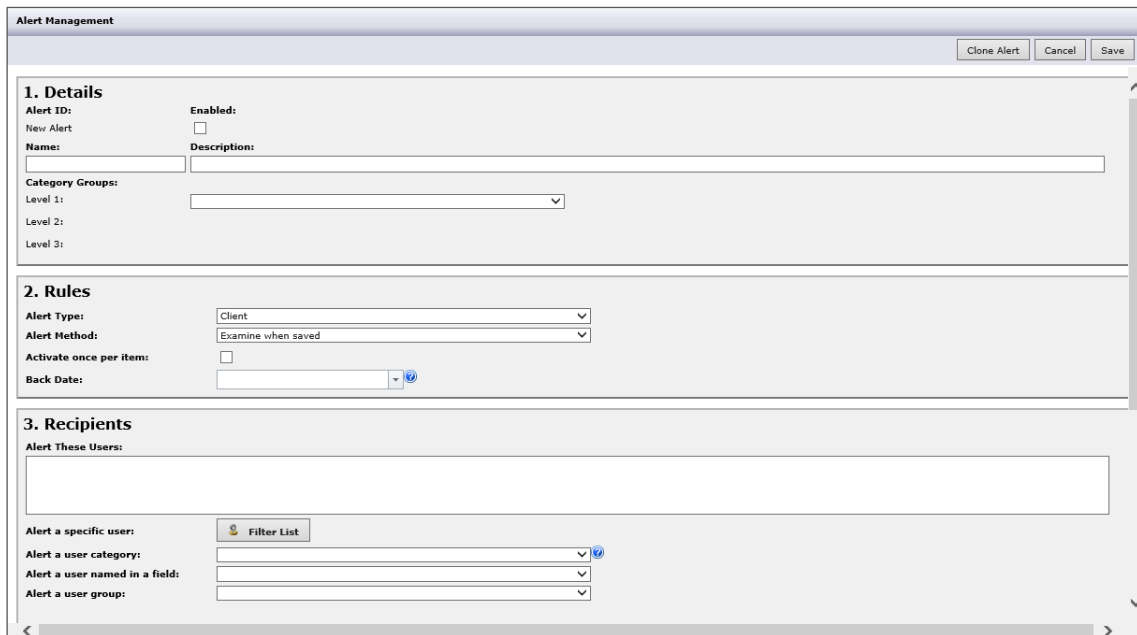


In Alerts V2, you must first choose the register that you wish to create an alert for, then click the “Add” icon:

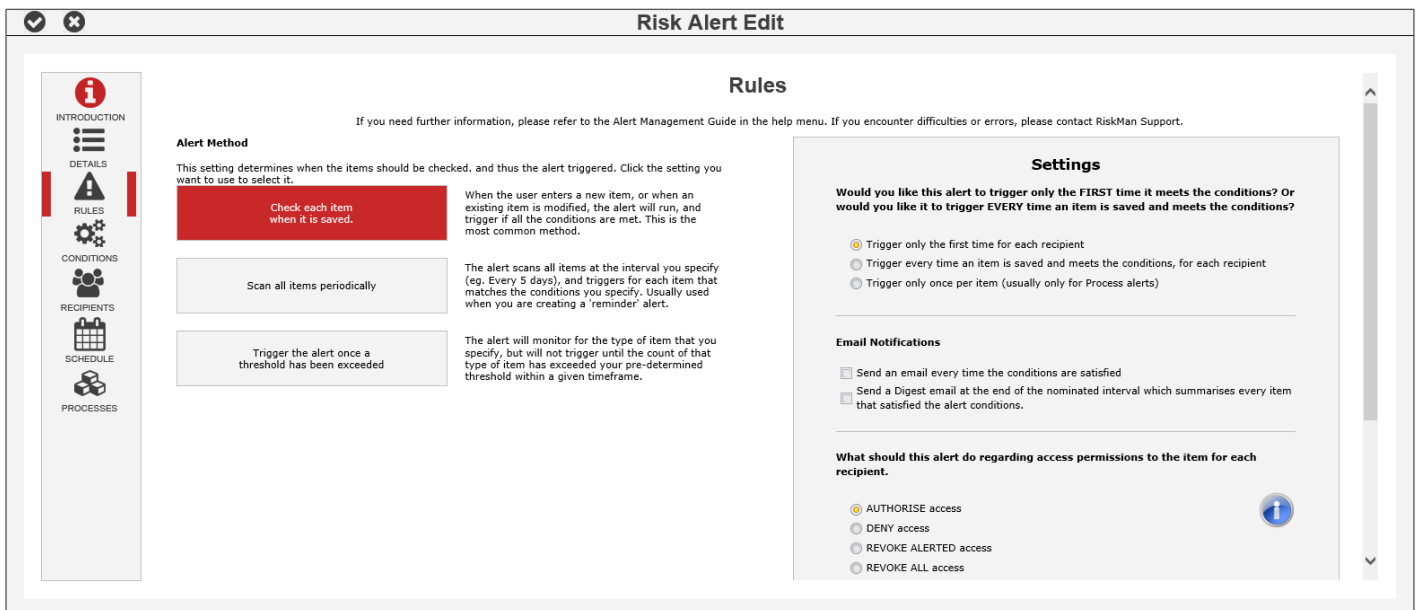


Interface comparison

One of the shortcomings of the original Alert interface was that there was very little guidance (if any) shown on the screen to explain what each setting actually does:



The new interface is far more user-friendly, with information provided for almost every setting:



In the screenshot above you will notice the settings groups represented with icons down the left hand side – these are the same as the numbered sections from the old alerts screen. The idea is to work through each group of options from top to bottom.

Also, certain settings groups will only be displayed if they are relevant to your alert. For example, the Email settings group will not be shown unless you select the option to send an email when your alert is triggered.

New functionality available in Alerts V2

- **Ability to include information from subforms in alert emails**
You can now include subform data in the email generated by an alert:

Location on body	Classification	When was pressure injury(s) identified?	Worsening of existing pressure injury?*	Device related?	Mucosal pressure injury?	Confirmed PI?	
Back of Right Elbow	Stage 1 - non-blanchable erythema	Within first 8 hours of admission/inpatient service	No	No	No	Yes	✘

EMail Notification

Email Subject
New pressure injury recorded

Email Body

A pressure injury has been recorded.
Location: [Program]
Details:

Location on body	Classification	When identified?	Worsening of existing injury?	Device related?	Device involved	Confirmed PI?
[BodyLocation]	[UlcerStage]	[IncPII]	[IncPIW]	[IncPID]	[IncPIDA]	[IncPIDConf]

- **“Digest” emails**
You now have the option of sending a “digest” email – where the records that match your alert conditions over a period of time are summarised into a single email, rather than sending one email for each record. An example of using this feature might be sending an email to the CEO every Monday morning, which summarises all the serious incidents that happened in the previous week. Digest emails can be sent as well as, or instead of, regular emails.

My Workspace Management Administration Data Reports Help Log Out USER: System Manager (Manager)

Incident Alert Edit

INTRODUCTION

A Digest email summarises all records that this alert has fired for in the specified period. The email can contain a table of the appropriate items identified. Please note: the table will list the items that fired the alert. If the item has been edited, it may no longer meet the alert conditions, but it will still be included in the table.

For a Digest email, since there is no single specific item that it is based on, there is no single field replacements available. You can add a summary table covering all the items that the Digest email relates to.

Add summary table to email

Digest Email

Time Frame: The previous 7 Day(s) up to Prior Day End

Run Frequency: Every week on Monday at 08:00

Digest Email Subject
Serious Incident Summary

Email Body

The following is a list of the serious (ISR1 & 2) incidents which occurred last week Monday to Sunday:

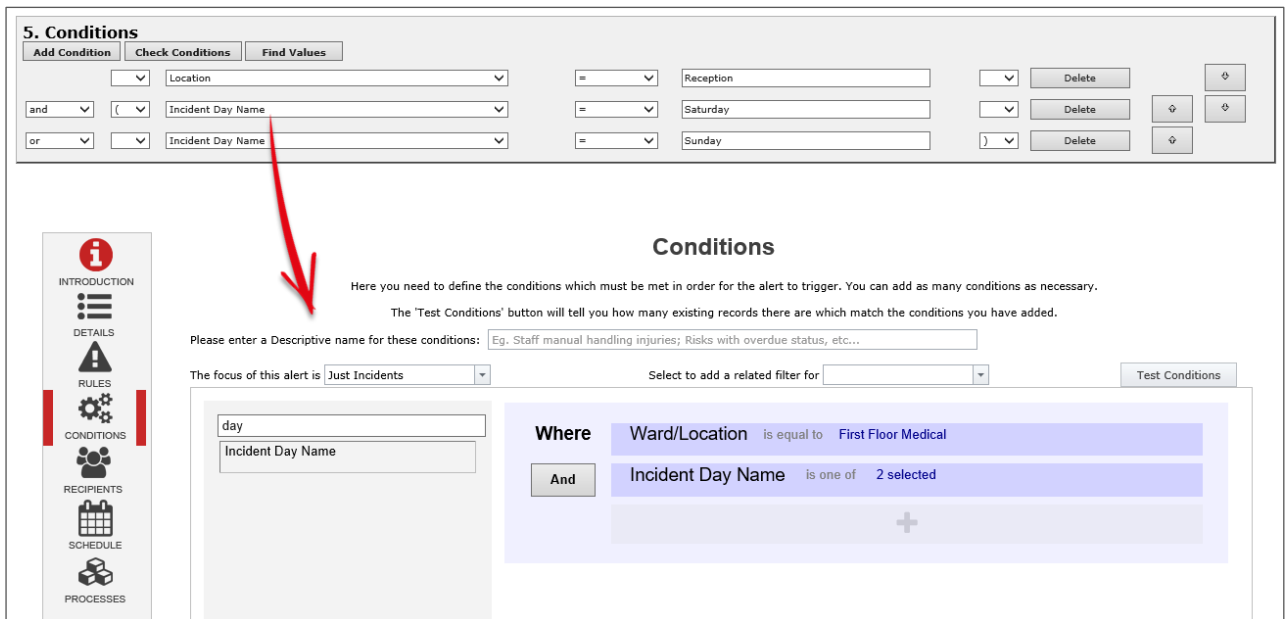
ID	Day	Time	Ward/Location	Initial SAC	Actual SAC	Summary of incident
[DisplayID]	[IncidentDayName]	[IncidentTime]	[Program]	[Outcome]	[IncActu]	[SACRating][Description]

Create a summary table that gives a brief overview of each record. The first column, DisplayID, is a link the user can click on to open each respective record in the table

Set the time frame and run frequency for the digest email (same as scheduled reports)

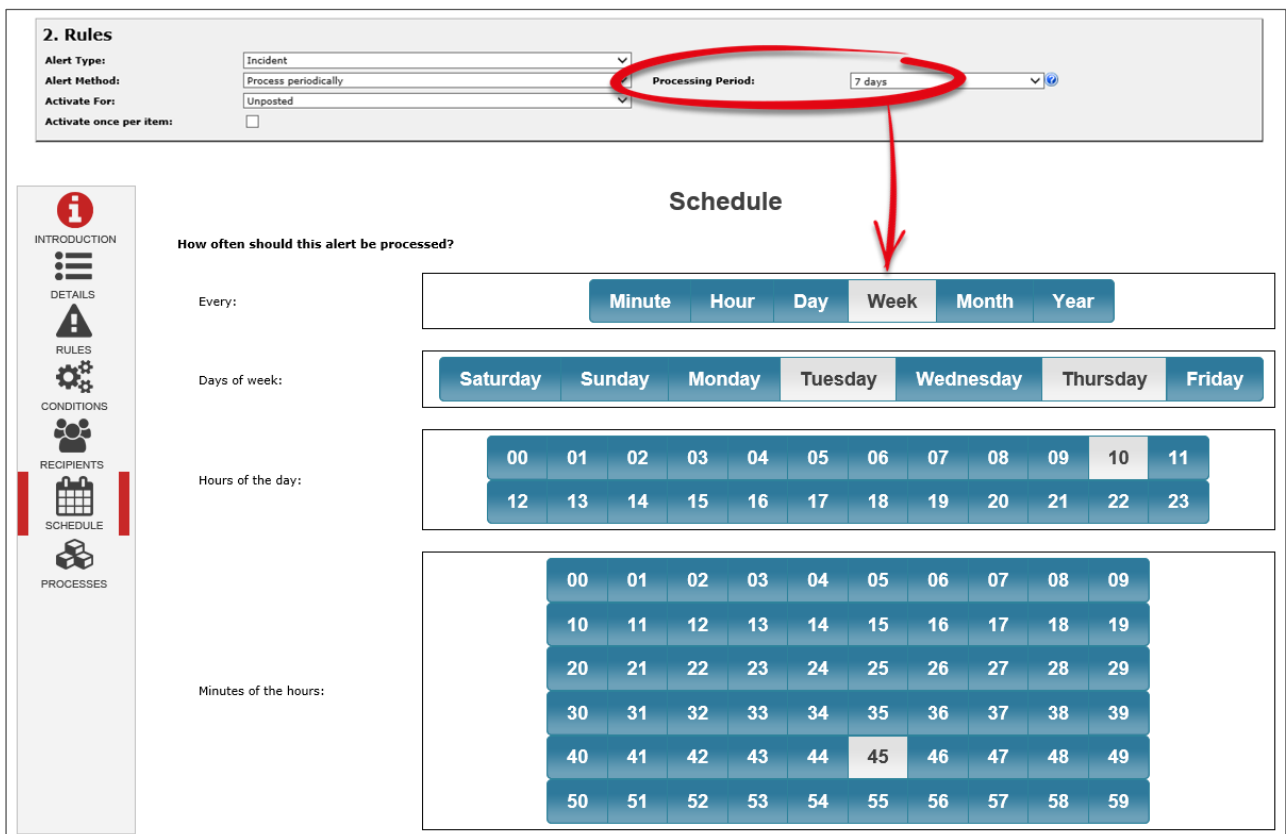
- **Advanced Conditions Builder tool**

Alerts V2 now uses the same intuitive conditions builder found in the Datasource Builder. For those of you upgrading from a version without the Datasource Builder, it is a new method of adding conditions, with some improved functionality:



- **Determine exactly when reminder emails should be sent**

The new **Schedule** option gives you greater control over when reminder emails should be sent. This replaces the “Processing Period” setting from V1. In the below screenshot, a reminder alert has been configured to send an email twice a week – at 10:45am on Tuesdays and Thursdays:



- **Alert Chaining**

This new feature allows you to specify that, for example, a record should only trigger Alert “B”, if that record has already triggered Alert “A” (and other variations on this theme). This can help accommodate complex workflows.

- **Each alert now has extensive logging**

In original Alerts, the only details logged were who last edited the alert, and when it most recently ran. Now, extensive logging has been added, which will capture:

- Any time the alert is enabled or disabled, and by whom
- Any time the alert is modified, including what changes were made, and by whom
- When the alert is triggered (i.e. The alert found a record that matched the specified conditions)
- Successful alert processing (i.e. the alert ran, but found no matching records)
- Unsuccessful alert processing (when errors occur)

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INTRODUCTION

DETAILS

LOGGING

Logging

Refresh Table Clear Logged Errors

Action	Records Found	Recipients Found	Emails Sent	Date	Duration(Seconds)	User	Details
Save Alert Update				20 Feb 2017 10:19		System Manager (Manager)	Show Edit Details
Processing Complete	0	0	0	10 Feb 2017 17:51	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:50	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:48	1.01400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:46	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:44	0.90500		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:42	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:41	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:40	0.98300		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:39	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:37	0.84200		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:35	0.95200		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:33	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:32	0.88900		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:31	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:30	0.84200		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:28	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:26	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:24	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:22	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:21	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:20	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:18	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:16	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:14	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:12	0.9200		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:10	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:09	0.87400		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:08	1.20100		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:06	0.88900		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:04	1.10800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:02	0.95200		No new items found.
Processing Complete	0	0	0	10 Feb 2017 17:00	0.85800		No new items found.
Processing Complete	0	0	0	10 Feb 2017 16:59	0.88900		No new items found.
Processing Complete	0	0	0	10 Feb 2017 16:58	0.87400		No new items found.

The following is an example of a change recorded in the Logging section:

✕

Edits made to the Alert:
 Alert was backdated to 26 Jan 2017
 Checking will start from reference ID 2476 onwards. NOTE: This is not the ID shown to users.
 Alert has been Enabled.

◀

▶

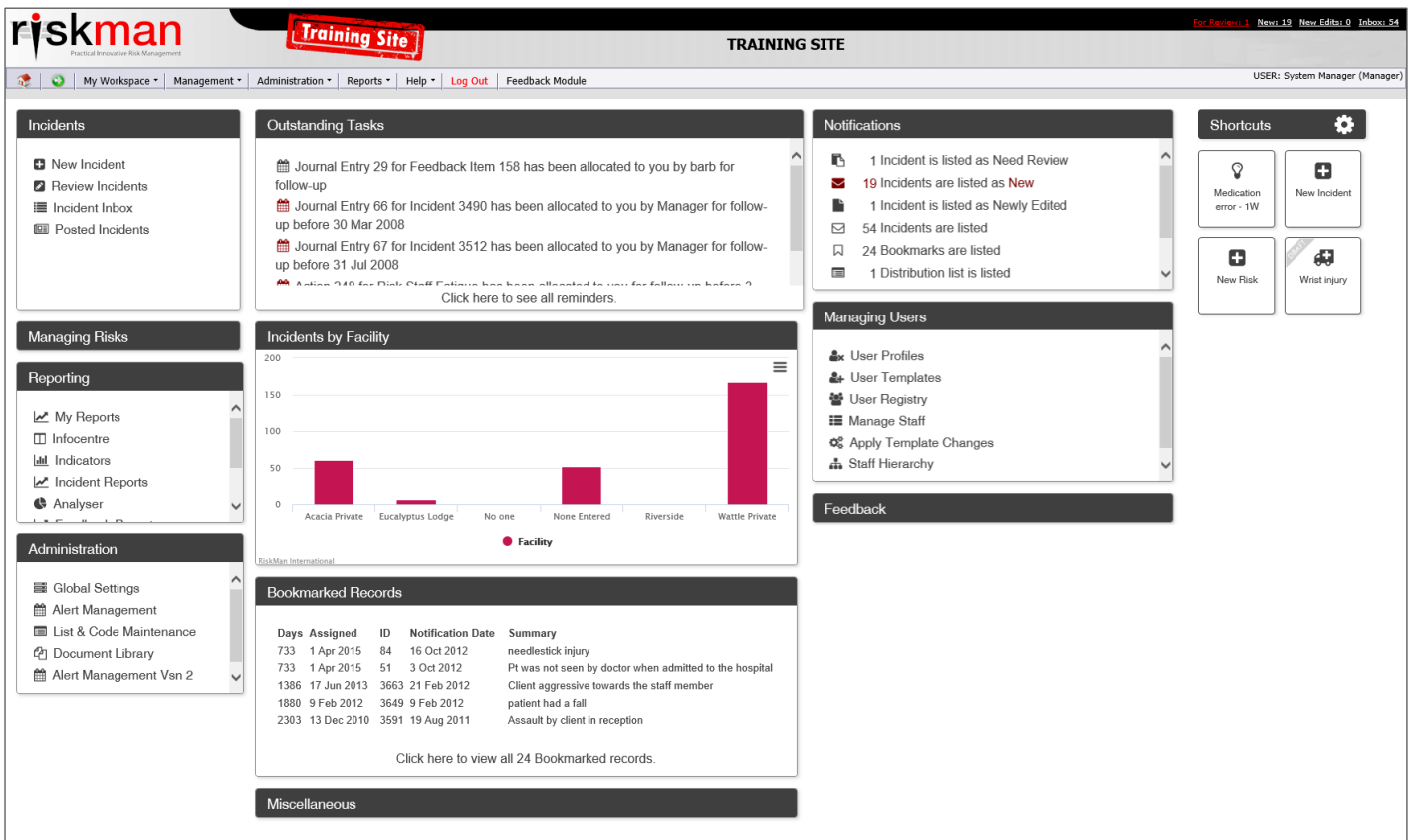
New Homepage

Significance: ●●○ Need for training: ●●○

The homepage has been completely re-written to be more functional and useful to end users. It has also allowed us to introduce some important new functionality.



The old homepage



The new homepage


Key points:

- **The new homepage replaces the old homepage.**
There is no new user permission around accessing the homepage. The most important note is that the new homepage is compatible with Internet Explorer version 9 and newer. Any users who have IE version 8 or older will automatically be shown the old homepage.
- **There is an administrative component to the homepage**
Users with the appropriate administrative permissions can control what can be seen on the homepage.
- **Widgets can be displayed on the homepage**
Widgets from the InfoCentre can also be displayed on the homepage.
- **“Shortcuts” have been introduced**
This user permission allows a user to create a ‘template’ record, and share it with other users.
- **“Drafts” have been introduced**
Allows a user to save a partially-completed form (irrespective of mandatory fields being incomplete) as a Draft. Users can save multiple drafts.

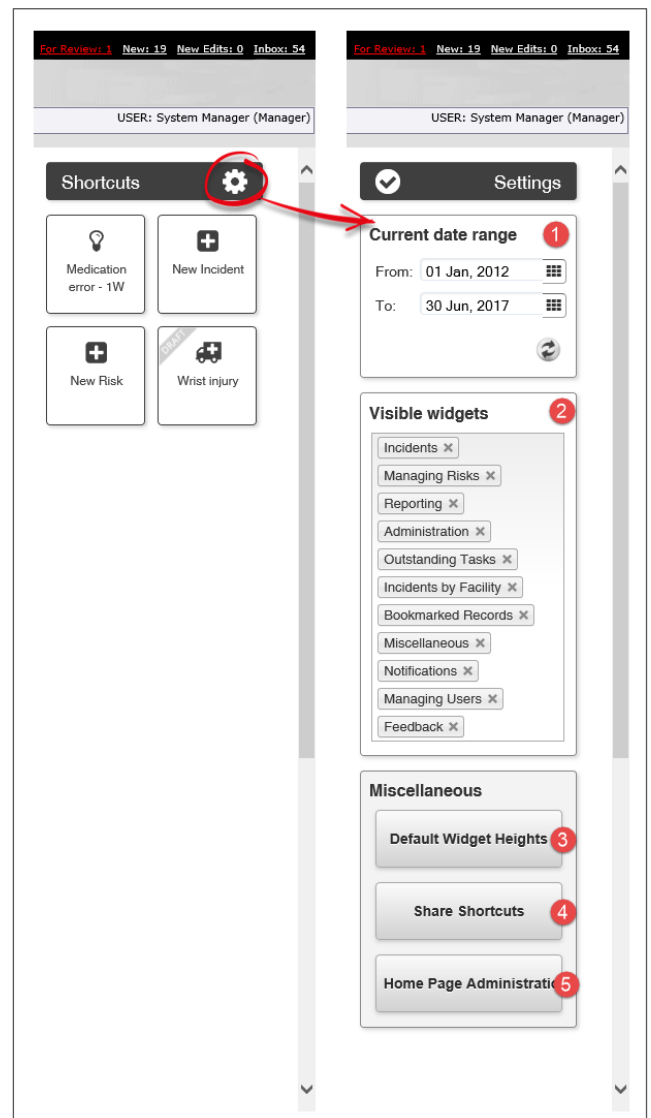
Functionality Overview

- **The homepage can be customised by each user**
The Homepage is divided into two sections: Shortcuts and Widgets. The width and number of columns (including the shortcuts) varies automatically depending on the width of your browser window.

The Homepage can be customised by the user, including widget height and visibility. The shortcuts can also be repositioned. All customisation is automatically saved as part of the user’s profile.

Click the cog  to reveal the Homepage Settings:

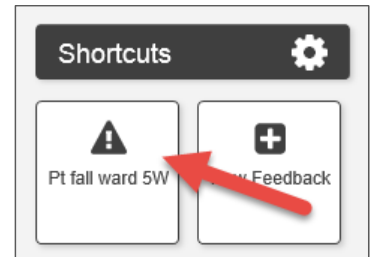
- 1 Date range for any widgets on the homepage
- 2 Available widgets that a user can show or hide
- 3 Return all widgets to their default heights
- 4 Manage the sharing permissions of Shortcuts
- 5 Access homepage administration settings



- **Shortcuts**

A Shortcut allows you to create new record with some fields already completed. They are designed to save time by eliminating the need to enter data which frequently needs to be recorded by a user.

For example, in a clinical setting, a nurse might frequently need to record falls which occur on a ward they work in. The nurse could create a Shortcut which starts a new incident, and pre-fills certain content, such as the Incident Involved type was a patient, where it occurred, the classification that it was a fall, and so on. The nurse could then complete the rest of the details on the form and submit the incident.



The following user permissions have been introduced:

[Register Name] > Basic Permissions > **Can create Shortcut**

[Register Name] > Basic Permissions > **Can share Shortcut**

As with all shareable items in RiskMan, a Shortcut can be shared with specific users, and/or an entire Template of users.

- **Drafts**

A draft is a partially completed form that a user intends to submit at a later stage.

A user can have multiple Drafts at any given time for any Register.

Drafts are differentiated from Shortcuts by a “DRAFTS” banner in the top left corner of the widget.

Drafts can also be set expire after a certain period of time has elapsed, which is controlled by a Global Setting.



The following user permission has been introduced:

[Register Name] > Basic Permissions > **Can create Draft**

The following Global Setting has been introduced:


Item Entry Defaults > Shortcuts > Draft shortcut expiry time (days)

Letter Builder

Significance: ● ● ○ **Need for training:** ● ● ○

The Letter Builder allows you to create highly formatted documents, which when generated based on a single record, can then have information from that record populated automatically at the points you determine. The Letter Builder is similar in concept to performing a mail merge in programs such as Microsoft Word™.

This is an example of a document that was generated using the Letter Builder tool:


 RiskMan Health Complaints Management Department
 11 Meaden Street
 Southbank 3006 Victoria
 Australia

John Citizen
 47 Hopkins Road
 Manly NSW 2095

Dear John

This letter is to acknowledge receipt of your complaint lodged with Amy Hopkins on 6/6/2016 at RiskMan Health.

You have stipulated that your desired outcome(s) of this complaint are:

- *Apology*
- *Action to prevent a recurrence*
- *Compensation/reimbursement*

The following are the actions associated with your complaint:

Related Issue	Description	Responsible Person	Status
<i>Car parking</i>	<i>Reimburse patient for the parking fine they obtained due to process taking longer than expected</i>		<i>Closed</i>
<i>Incorrect/inadequate information</i>	<i>Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit</i>	<i>Nick Jones</i>	<i>Open</i>

Your complaint is being managed by **Nick Jones**, who will be in contact with you soon to arrange a follow up.

Nick Jones can be contacted directly on **96860009**, should you wish to discuss any aspect of your complaint in further detail.

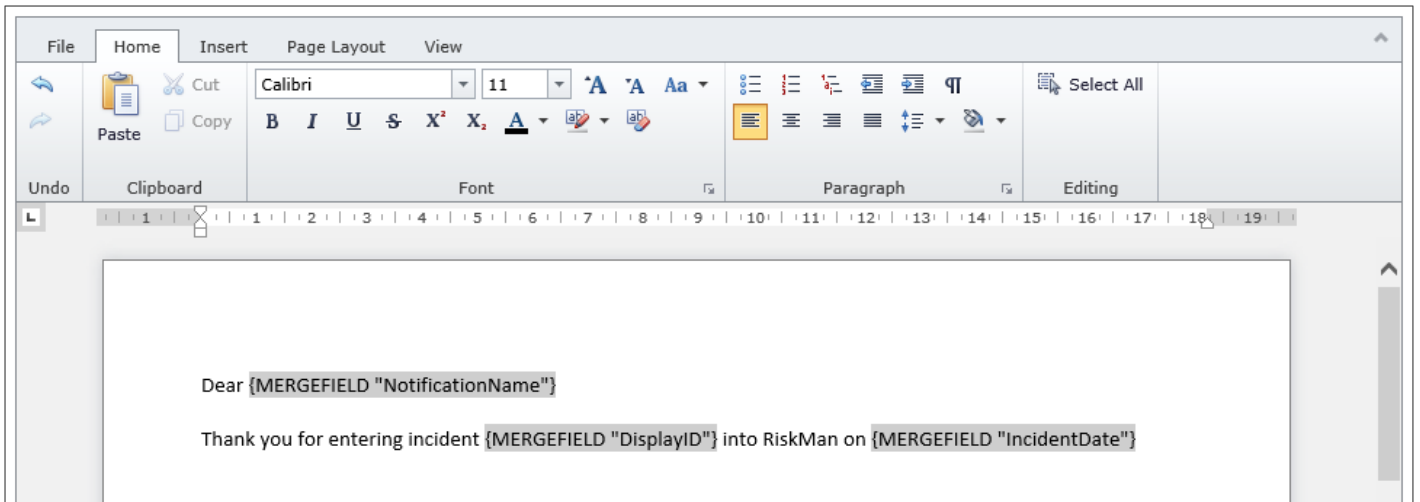
Regards,

Sarah Smith
 Client Liaison Officer
 RiskMan Health

Some examples of when the Letter Builder might be used:

- To create an acknowledgement letter that is generated when a consumer lodges a complaint
- To create a notification letter for a WHS event based on an employee incident
- As a means of creating your own single-record report form; for example, you could create an internal document that needs to be printed which details key information when a critical incident occurs

The Letter Builder tool is similar in concept to creating an Alert email. The interface is designed to emulate Microsoft Word for familiarity:

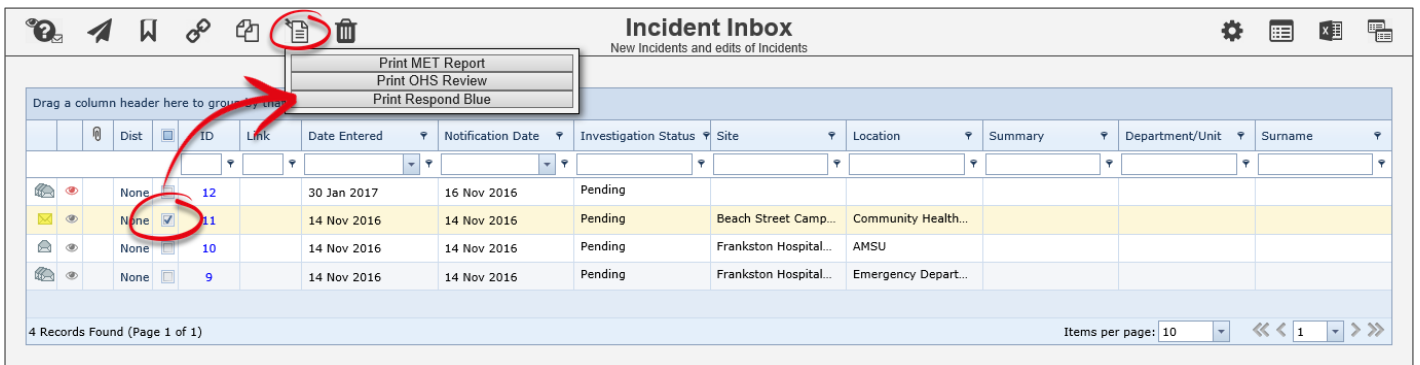


You can also import Microsoft Word documents directly into the Letter Builder, and then add your own customisations.

Generating a letter or document

Letters are generated by selecting a record from a list page, and using the custom action icon to choose a letter to generate, based on that record.

RiskMan will assist you in adding a configured letter to your desired list page.



Letter Builder permissions

There are 2 new user permissions associated with the Letter Builder:

[Register Name] > Basic Permissions > **Can generate results using Letter Builder**

This permission allows a user to see the custom action button and subsequently generate a letter based on a record.

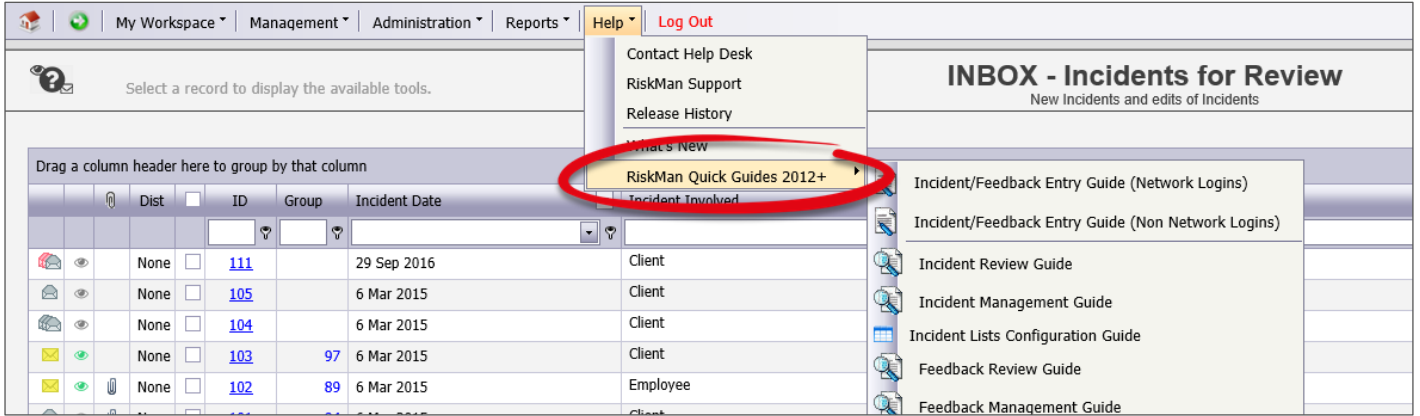
[Register Name] > Management Permissions > **Can generate and edit Letter Builder items**

This permission allows a user to create letters and documents via the *Administration > Letter Builder* menu option.

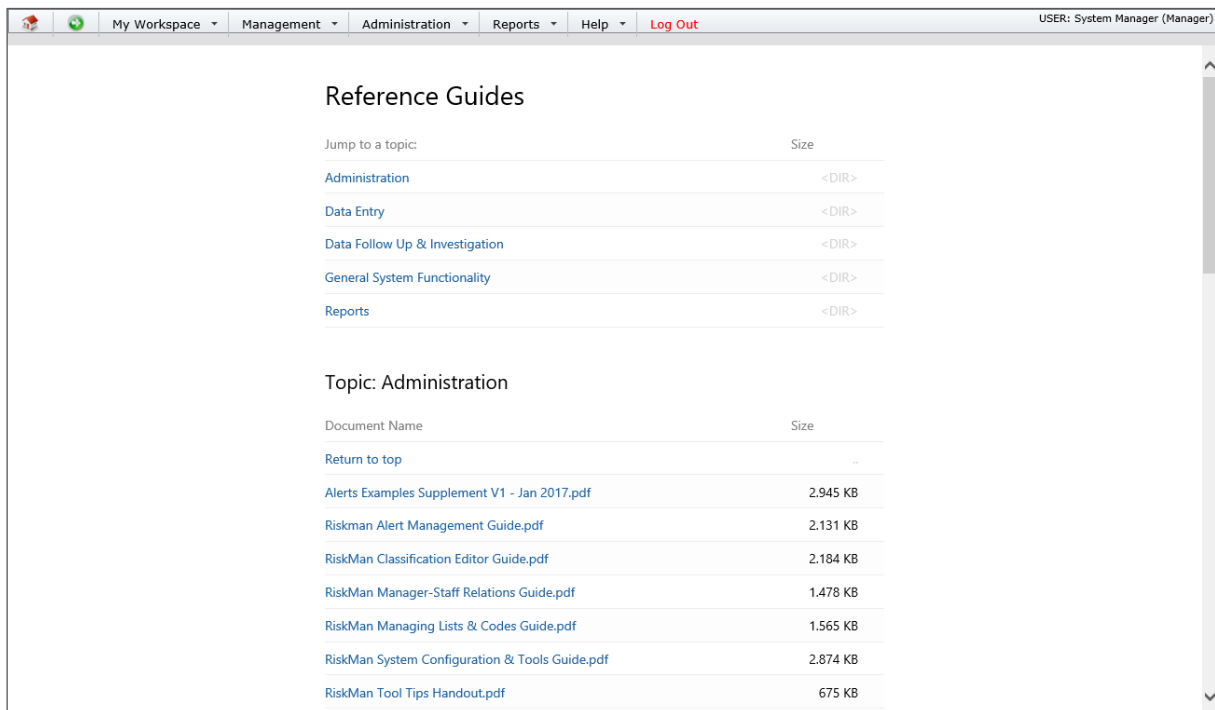
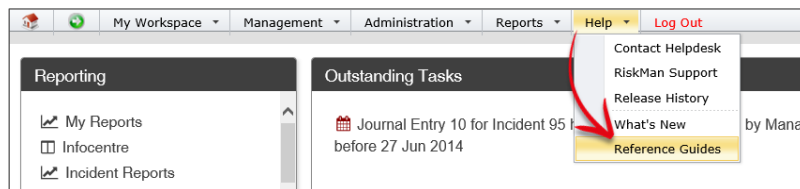
New Reference Guides Menu Option

Significance: ● ○ ○ ○ **Need for training:** ● ○ ○ ○

In previous versions of the system, under the Help menu, there was a “Reference Guides” option, which would pop out another menu that contained direct links to our PDF reference guides:



This menu option has been replaced with a new one called “Reference Guides”. When you select this menu option, instead of another pop out menu, a list of the guides will load in the main application area.



The reason for this change was to allow RiskMan to publish reference guides at any time that were up to date. The old method meant that you were unable to see the most up to date reference guides until you upgraded.

ADFS User Authentication

Significance: ● ● ○ **Need for training:** ● ○ ○

RiskMan can now be configured to support ADFS User Authentication. This can help provide a seamless login experience, whereby a user is automatically/silently logged in based on their login to the computer they are currently using.

For a non-tech person, what is ADFS?

Active Directory Federation Services (ADFS) is a software component developed by Microsoft that can be installed on Windows Server operating systems to provide users with single sign-on access to systems and applications located across organizational boundaries. ADFS is basically Microsoft's solution for Single Sign On and web-based authentication.

It is used primarily to provide a single set of credentials that can access a variety of sites/online systems not necessarily hosted within the same domain.

Key points about ADFS:

ADFS is better designed for the web as it communicates over standard HTTPS.

Although it does use make use of some open standards (HTTPS, SAML etc.), it is Microsoft-specific and requires Internet Information Services (IIS) which only runs on Windows Servers.

It works by having a single site (site A) that hosts the ADFS / ADFS proxy servers, which has access to the credentials (usually by communicating with an Active Directory Domain Controller). It is then given a trust between other sites (sites B & C – your RiskMan system, for example) that require authenticating through the ADFS.

Are ADFS servers typically accessible from the internet (whereas corporate Active Directory domain controllers would not be)?

Yes, nearly always. ADFS is based on the notion that it will be primarily used for website/online system authentication.

The ADFS-proxy site is the one that is usually accessible from the internet. However the ADFS itself is not. The ADFS is generally a separate server from the ADFS-proxy.

ADFS Server: Server that links to the credentials, and has the claims configuration as well as the trusts. Generally not publicly accessible.

ADFS Proxy Server: Server that hosts the IIS instance that has the login pages for the websites requiring authentication. Communicates back to the ADFS when requiring authentication. Generally publicly accessible.

If you want to investigate using ADFS in your organisation's deployment of RiskMan, please contact RiskMan Support in the first instance.

Enhancements and Changes

Enhancements and changes are rated on a scale of 1 to 3 by their significance, and need for training. Some enhancements and modifications made to existing system features might be invisible

Significance Scale Explanation

● ○ ○	A small change that would scarcely be noticed, or something has been made much easier than before
● ● ○	A significant change; expansion of existing functionality that may change the way you use the system
● ● ●	A major enhancement or modification that would require proper planning to be rolled out

Need for Training Scale Explanation

● ○ ○	Users may only need to be told about the change; intuitive and simple, so usually no training required
● ● ○	A change that will likely require internal training to ensure proper use; you may pick it up yourself
● ● ●	A change which is highly involved and is likely to require RiskMan training in its proper use

Note

Where the ability to do so exists, all new functionality and settings introduced in a new version of RiskMan are turned OFF by default, unless stated otherwise.

User Management Changes

The following changes relate to User Profiles, Templates, and the User Registry.

User Profiles

- **Changes and enhancements have been made to password management (non-LDAP accounts)**
Significance: ● ● ○ **Need for training:** ● ○ ○

We have made extensive security enhancements around user password management for standard RiskMan accounts. These changes have no effect on LDAP accounts, as passwords for those accounts are not stored.

1. **When using RiskMan standard accounts, passwords are now one-way encrypted. This has several implications:**
 - a. Password recovery is not possible, even by RiskMan technical staff.
 - b. The 'Recover Password' function has been replaced by a 'Reset Password' function.
 - c. Passwords for RiskMan standard accounts will now be case sensitive. Previously they were not.
 - d. Password encryption is not optional.
2. **You can now force users to change their password when they login for the first time.**
 A new setting has been added to User Profiles for RiskMan standard accounts:

When 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.

A new Global Setting has been added to complement this change:

Users > Password Management > 95) Enforce new users to change password on first login

When enabled, this will tick the 'Force Change Password' checkbox on User Profiles page when a new user is created. On a per-user basis, a system administrator can untick this option in a user's profile if they do not wish to enforce the change password rule.

3. **You can now temporarily “lock” a user out if they exceed a set number of unsuccessful login attempts.**

A new Global Setting has been added to control this change:

Users > User Control > 140) Maximum number of successive failed login attempts allowed

This setting can be used to define the maximum number of successive failed login attempts allowed before the user gets locked out. Set this to "Disable" to prevent user lock out altogether. Once a user completes the number of attempts defined in the setting, they will be locked out for a period of 30 minutes. After 30 minutes, the user will once again have the defined number of login attempts.

If this Global Setting is set to "Disable", the user lock out feature will be switched off, and users will have unlimited failed login attempts.

4. **Users with standard (non-LDAP) accounts will now be prevented from using their 12 most recent passwords when they attempt to change their password.**

RiskMan now securely (and invisibly) stores the 12 most recent passwords a user has used on their account. If the user attempts to use one of those when changing their password (for whatever reason), they will be forced to use a new password.

This change is not controlled by a setting, and will be applied automatically.

5. **Added the ability to prevent users from changing their password too frequently.**

A new Global Setting has been added to control this change:

Users > Password Management > 25) Only allow one password change per day

When enabled, users will only be able to change their passwords once per day. This prevents users, when forced to change their password, from immediately changing it back.

• **When a user self-registers, we've added ability for you to specify which Template they should be assigned to, based on the user's Site**

Significance: ● ● ○ **Need for training:** ● ○ ○

When a user self-registers in RiskMan, normally they are allocated to the 'Default' template for each register, and for General.

Now, we have allowed you to define which template a user should be allocated to, based on their site.

A new list in List & Codes Maintenance has been added to control this change:

Default template to apply to self-created users, based on selected Site.

During self-registration, if the user is allowed to specify their own Site, then the above list will be referred to and, if the Site is found, the Template the user should be allocated to is retrieved from here.

Should the user choose 2 or more Sites, one will be selected randomly.

Should the site appear more than once in this list, one will be selected randomly.

For each Register, the system will attempt to assign the user to the defined Template. If the Template does not exist in a Register, the user will be assigned to the 'Default' Template instead.

To appear as an option in this list, a Template must exist under the 'General' tab or in the 'Incidents' register.

This list will have no effect on users created by an administrator.

• **The User Registry page has been updated and is cross-browser compatible**

Significance: ● ○ ○ **Need for training:** ● ○ ○

Reports Changes

The following changes and improvements have been made to the various reporting tools in the system.

Scheduled Reports

- **Send an email to a specific email address in case a schedule fails**

Significance: ● ○ ○ **Need for training:** ● ○ ○

You now have the ability to send an email to a certain person in case a scheduled report job fails. The purpose of this is to allow an administrator know of potential issues with the scheduler utility.

A new Global Setting has been added to control this feature:

Scheduled Jobs > 90) Address to notify for scheduled report failures

The system will generate an email and send it to the address that you enter in this setting.

Advanced Conditions Builder

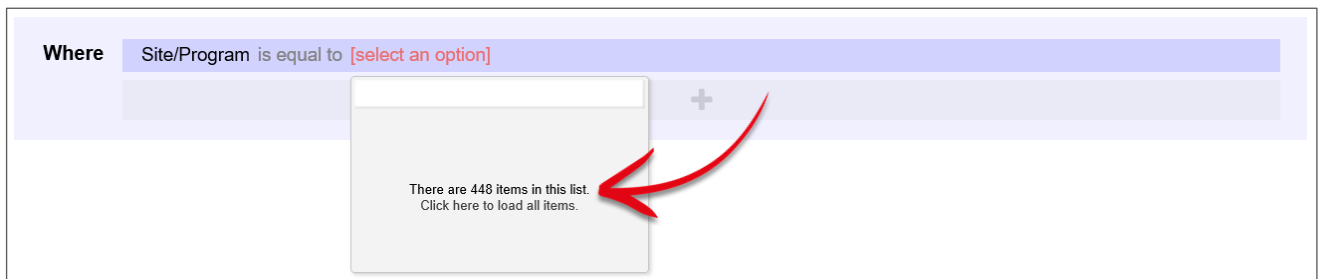
- **Improvements have been made to the Advanced Conditions Builder interface**

Significance: ● ○ ○ **Need for training:** ● ○ ○

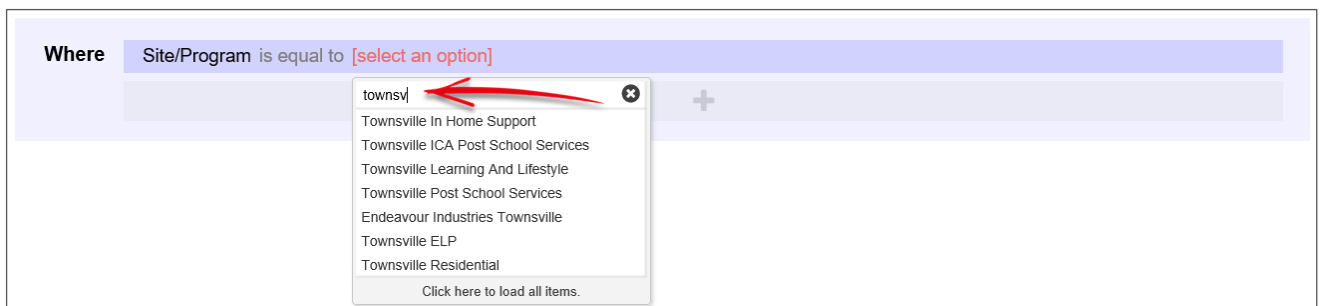
As accessed in the Datasource Builder, or Alerts V2

When trying to add a filter condition that referred to a large list, previously the system might have been slow to load that list. This resulted in a poor user experience.

The system has now been modified so that large lists do not load all values by default:



The user can start typing the value they want, and the system will display all the matching list values:



At any point, the user can opt to click the **Click here to load all items** option. If the user opts to retrieve all the values in a larger list, there might be a few seconds' delay. However, a "loading" icon will be displayed during that time, so that the user knows that their request is being processed.

Widgets (InfoCentre / Homepage)

- Additional formatting controls have been added to chart widgets

Significance: ● ○ ○ Need for training: ● ○ ○

1. Charts now have 3D formatting controls available:

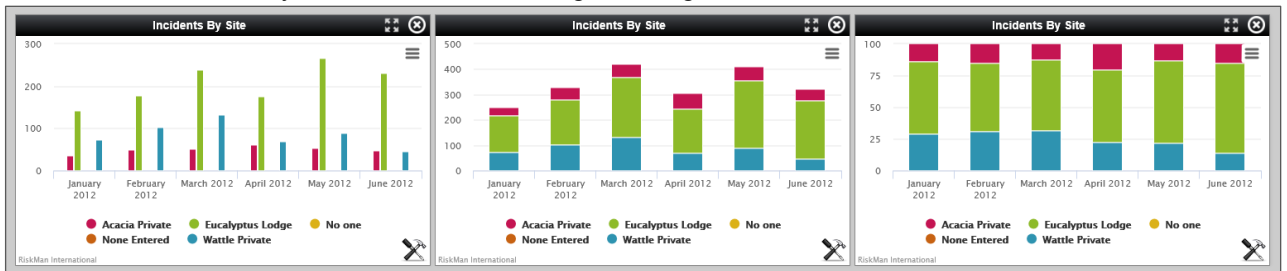


The same widget without and with 3D formatting

The 3D formatting can be modified by clicking the widget's icon, and clicking the 3D tab:

- Adjusts the depth of the 3D effect
- Adjusts the rotation of the chart on X/Y/Z axes
- Changes the margin (i.e. The amount of space from the chart image to the edge of the widget frame. You will need to use these settings to counter undesirable results when experimenting with the depth and rotation of the chart. The letters stand for Top, Right, Bottom, and Left.

2. For multi-series charts, you can now use stacking to change the look of the chart:



The same widget with no stacking; standard stacking; and 100% stacking

The stacking property can be modified by clicking the widget's icon, and clicking the Custom tab:

- Off:** The series will be displayed as individual bars/columns/lines
- Standard:** The series will be stacked to the sum of their parts
- Percent:** The series will be stretched to 100% and each part represented as a percentage of the sum of all parts

InfoCentre

- You can now limit the number of groups, and the number of widgets that can be added per group
Significance: ● ○ ○ **Need for training:** ● ○ ○

Previously there was no limit to the number of widgets that could be added to a group in the InfoCentre. This meant that a user could add a large number of widgets to a group which meant that when the group was opened, there could be quite a delay in loading all the widgets.

You are now able to limit the number of widgets that can be added to a group for performance purposes. You can also restrict the number of groups that a user can add to their view of the InfoCentre.

2 new Global Settings have been added to control this feature:

Reports > 160) What is the maximum number of widget groups allowed in the InfoCentre?

Reports > 170) What is the maximum number of widgets allowed per group in the InfoCentre?

Note

These restrictions will not apply to users who have the permission to see Global Settings

Reports

- Improvements to information privacy and security when qualitative reports are run**
Significance: ● ● ○ **Need for training:** ● ● ○
- If a user does not have permission to see a field (i.e. The field is set to “Do Not Display” in their User Template) - for example, “Investigations/Findings” - BUT they also have permission to run a My Report where the layout used contains the Investigations/Findings field, then they WILL see the content of that field when they run the report.
 Now you can ensure that the user will not see the content of those fields when they run a report.

2 new Global Settings have been added to control this feature:

Reports > 180) When producing reports, mask fields that the user doesn't have permission to

Reports > 190) What mask to use when obscuring "Don't Display" fields

When the first setting is on, fields that the user has no permission to will be masked when reports are generated. The second setting is what string of characters will appear instead of the content. The default character string is “*****”.

Here you can see two examples of the same report generated by the same user. The upper was run with the Global Setting turned off, and the lower was run with the Global Setting on.

Incident Date/Time	ID	Gender	Age	Summary	First Name	Surname	Division Location	Department/Service
Incident Involved Child / Young Person								
4 Mar 2016 10:25	152	Male	0		Mark	Rodgers	Disability & Community Services In the home	Youth Support
Incident Involved Client								
6 Jan 2016 08:30	16	Male	90		John	Smith	Client Services (None Entered)	Location
8 Jan 2016 04:00	76	Female		Description			Disability and Community Services (None Entered)	Location
11 Jan 2016 08:21	78	Not Specified		Description	Jo		Strategy and Growth (None Entered)	Location
Incident Involved Child / Young Person								
4 Mar 2016 10:25	152	*****	*****	*****	*****	*****	Disability & Community Services In the home	Youth Support
Incident Involved Client								
6 Jan 2016 08:30	16	*****	*****	*****	*****	*****	Client Services (None Entered)	Location
8 Jan 2016 04:00	76	Female		Description			Disability and Community Services (None Entered)	Location
11 Jan 2016 08:21	78	Not Specified		Description			Strategy and Growth (None Entered)	Location

2. An extension of this new functionality allows you, via RiskMan configuration, to nominate fields in your system as “Identifying” fields. Fields marked with this configuration property will always be masked, irrespective of the user having permission to see those fields.

A new User Permission has been added to allow you to control this functionality:

General > Reporting Permissions > Can see “identifying” fields in reports

If a user has this permission, then they will be able to see the content of fields marked as identifiable when they run reports. This effectively allows you to setup a privileged group of users who can see identifiable information in reports, whereas other users cannot.

Note

This functionality will be a quoted project to add to your system, as it requires configuration work to be completed by RiskMan. Please contact us for further information.

Data Entry Form Changes

The following changes generally apply to the data entry form (irrespective of register, unless otherwise specified)

Attach Documents section

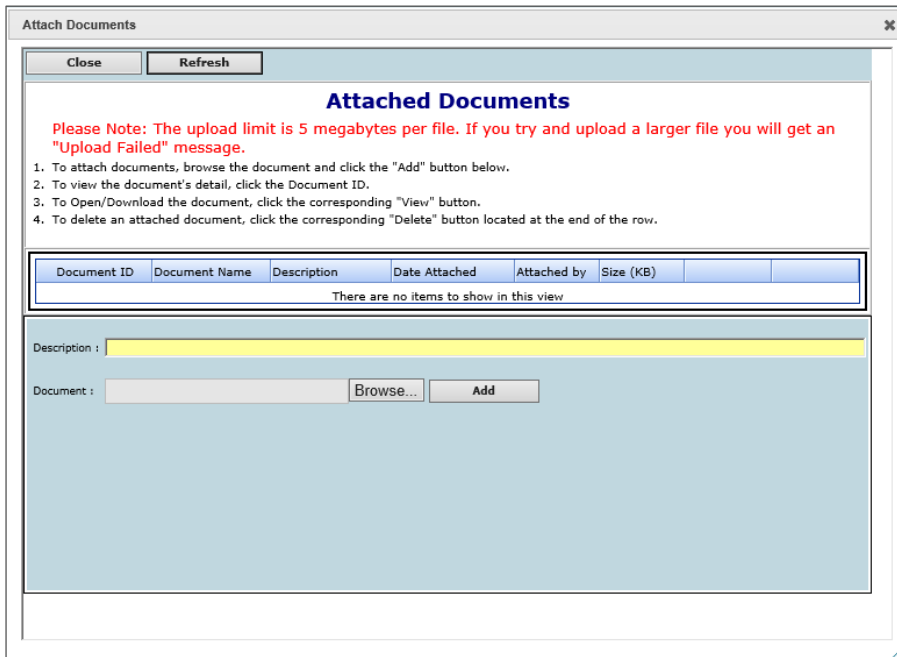
- **The user interface of the Attach Documents section has been modernised**

Significance: ● ○ ○ **Need for training:** ● ○ ○

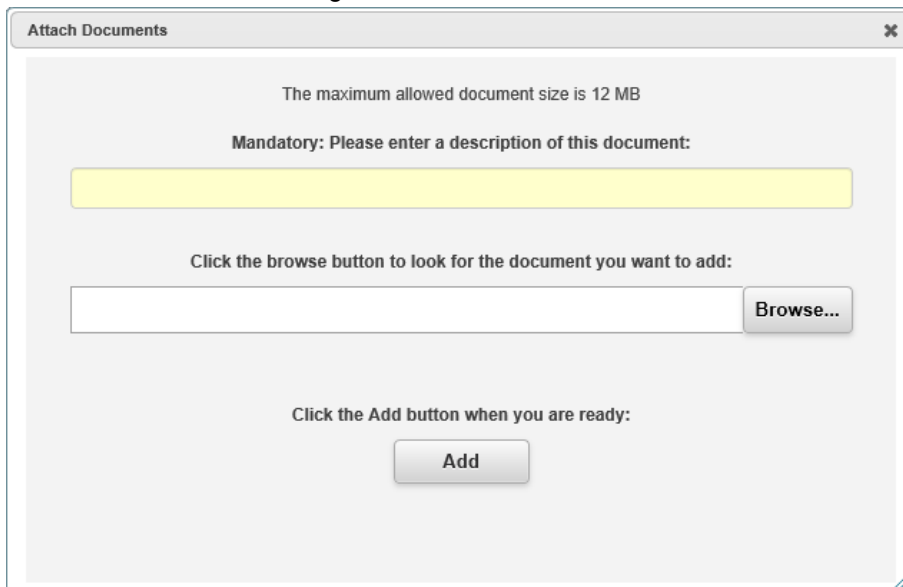
The Attach Documents experience has been made simpler and cleaner. The “Attach” dialog is very simple and steps the user through the process. As well as that, the table in which your documents sit has been modernised.

There is no setting to turn this change on or off.

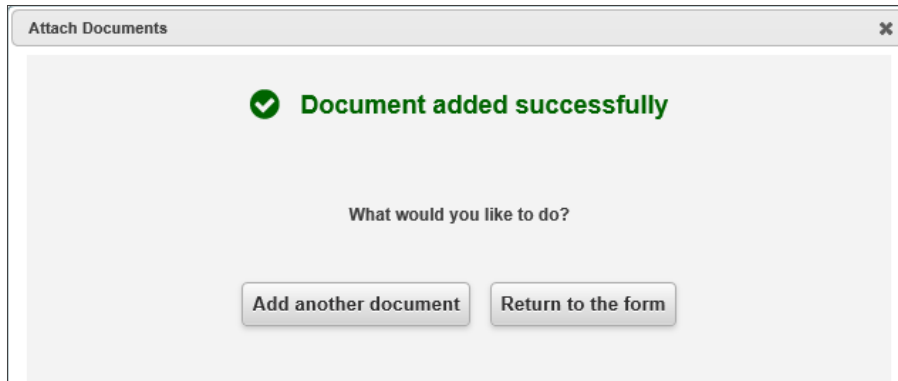
Previous attach document dialog:



New attach document dialog:



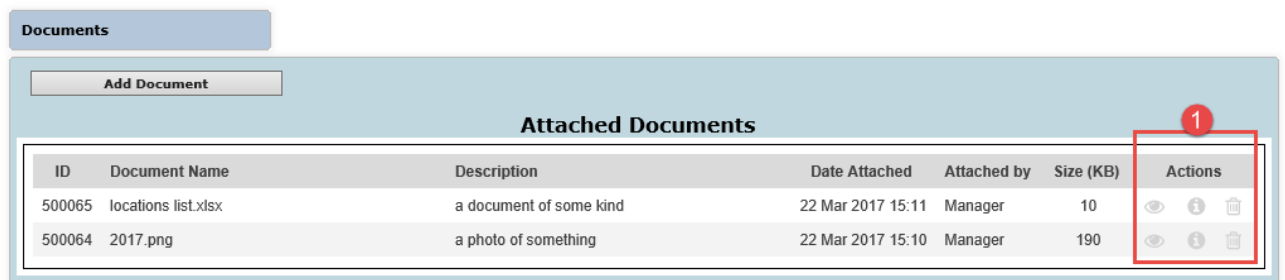
After attaching your first document, you will be asked what you want to do:



Previous Attach Document section design:

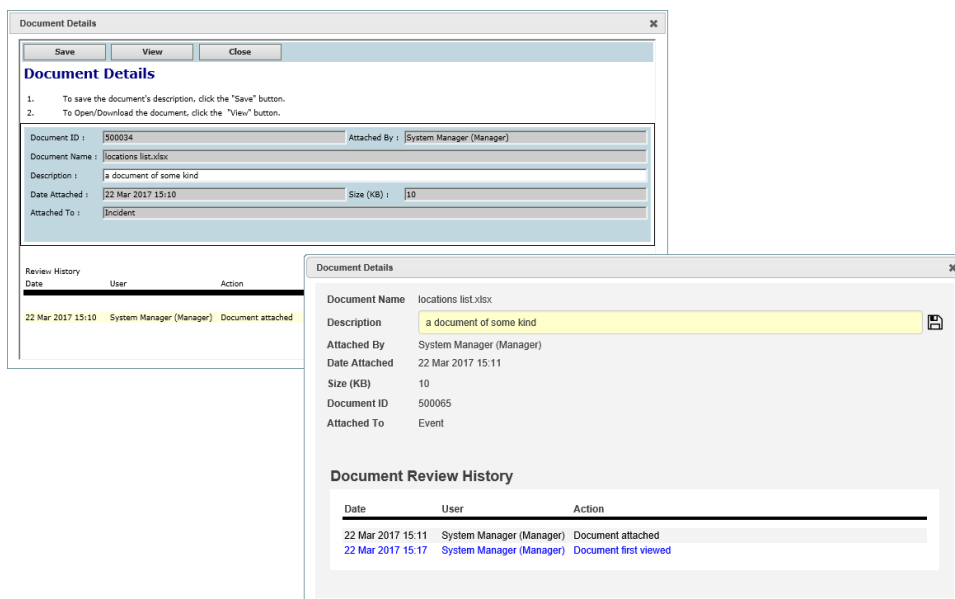


New Attach Document section design:



1 The action buttons have been changed to icons. Note also that the Document Properties icon – the magnifying glass icon in the first screenshot – is now located on the right hand side with the other icons.

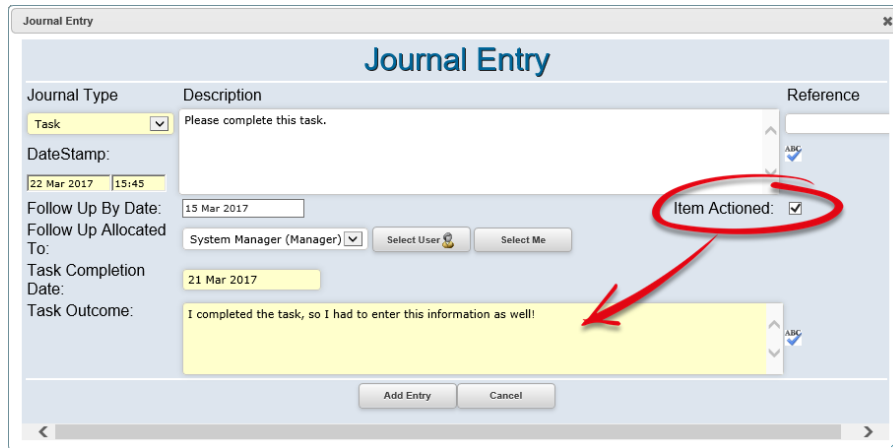
The previous and new document properties dialogs:



Journals

- When a user actions a Journal, users will be prompted to complete 2 mandatory fields
Significance: ● ● ○ **Need for training:** ● ○ ○

The two fields are called **Task Completion Date** and **Task Outcome**:



This change is optional, and is controlled by a new Global Setting:

Item Entry Defaults > Journals > 40) When a Journal is actioned, it is mandatory to enter the "Task Outcome" and "Task Completed Date" fields

When enabled, a user actioning a journal will be required to enter information in the Task Outcome field, and also supply a Task Completion Date.

These fields will be shown even if they are set to not be displayed under the current rules for the Journal Type (via List & Codes Maintenance).

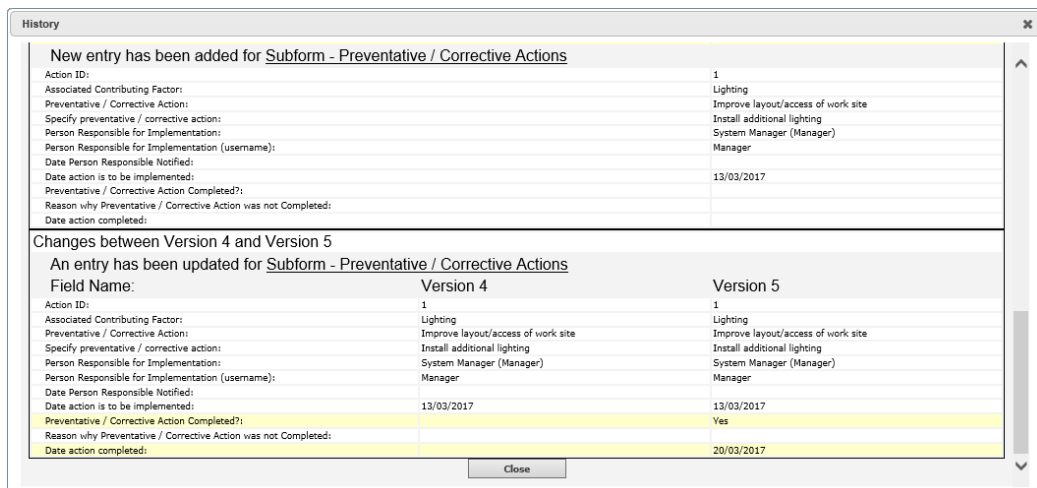
When a journal is displayed, e.g. in a report, the outcome and task completion date will be shown if the item is actioned and there is a value in the task completion date field.

Change History

- The Change History now includes all changes made to subforms
Significance: ● ● ○ **Need for training:** ● ○ ○

This includes when a new subform is added, a subform is edited, and a subform is deleted.

These changes are not controlled by any settings, and will be applied automatically.



Linked Records

- **Linked Records dialog modernised; new functionality available**
Significance: ● ● ○ **Need for training:** ● ○ ○

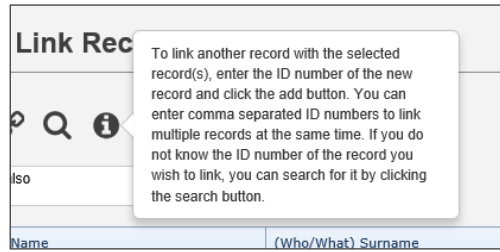
- ① Add the ID of a record you wish to link
- ② **New:** Enter the reason you are linking/de-linking this new record. The reason will be recorded in the Review History of the master record. Another Review History entry will be made in the master record while performing actions like linking, de-linking, changing the master record, and dissolving the group.

Review History

Date	User	Notes
16 Mar 2010 15:49	Nurse, Mary (Nurse)	Created the incident item.
16 Mar 2010 15:49		Risk Manager Email SENT.
16 Mar 2010 15:49	Nurse, Mary (Nurse)	Most recently viewed.
16 Mar 2010 15:49	Esler, Scott D. (Scott Esler)	Manager Email SENT.
16 Mar 2010 15:49	Esler, Lucinda (Unit Manager)	Manager Email NOT SENT: No Email address in their User Profile.
16 Mar 2010 15:49		Email sending process after initial incident entry was successful.
15 Aug 2012 10:30	Welsh, Simon (Simon)	Email SENT: Distribution List
20 Aug 2012 11:25	Welsh, Simon (Simon)	Most recently viewed.
20 Aug 2012 11:25	Welsh, Simon (Simon)	Incident first viewed after being assigned on System Manager (Manager)'s distribution list.
4 May 2017 10:38	System Manager (Manager)	Linked to ID 3614
4 May 2017 10:38	System Manager (Manager)	Linking/De-Linking Reason: These were part of the same event.

- ③ Click to link the record you entered in ①
- ④ **New:** Search tool helps you find a record so that you don't necessarily need to know its ID number:

- ⑤ This info icon will display a tool tip, providing the user with advice on using the tool:



- 6 De-link all records (previously the “Dissolve Group” button)
- 7 Click to exit the dialog
- 8 **New:** The Master record will now always be the first one listed
- 9 Click to promote a record to be the Master record
- 10 Click to de-link the selected record

New Global Settings

The following Global Settings have been added to allow you control over the enhancements to the Linked Records dialog:

Register Item Lists > 30) Reason for linking records together

When set to **yes**, the “Reason for linking / de-linking” text box will be shown in the Link Records dialog.

Register Item Lists > 40) Minimum length of Reason for linking text when enabled

When the Reason for linking feature is enabled, this setting will define the minimum number of characters the user will need to enter in the Reason For Linking text box. Any value greater than "0" will make the field mandatory. Set it to "0" to make the field optional.

Register Item Lists > 50) Maximum length of Reason for linking text when enabled

When the Reason for linking feature is enabled, this setting will define the maximum number of characters a user can enter as Reason For Linking text.

General Configuration Enhancements

This is a collection of small enhancements and improvements pertaining to the data entry form in general. Some of them are user-controlled; others require intervention by RiskMan to setup, as they are related to your specific configuration of the data entry form.

- **Add a prefix or suffix to mandatory fields**
Significance: ● ○ ○ **Need for training:** ● ○ ○

You now have the ability to add a prefix or suffix to the label of a field which is mandatory:



Mandatory field with no prefix/suffix



Mandatory field suffixed with two bold red asterisks

New Global Settings

The following Global Settings have been added to enable this feature:

Item Entry Defaults > 150) Mandatory field prefix/suffix setting

Controls whether mandatory fields should have a prefix, a suffix, both, or none at all. You can make register-specific versions of this setting.

Item Entry Defaults > 160) Prefix string for the title of mandatory fields

This setting contains the text you want as a prefix on the labels of mandatory fields. You can use HTML tags to control the format of the text. You can make register-specific versions of this setting.

Item Entry Defaults > 170) Suffix string for the title of mandatory fields

This setting contains the text you want as a suffix on the labels of mandatory fields. You can use HTML tags to control the format of the text. You can make register-specific versions of this setting.

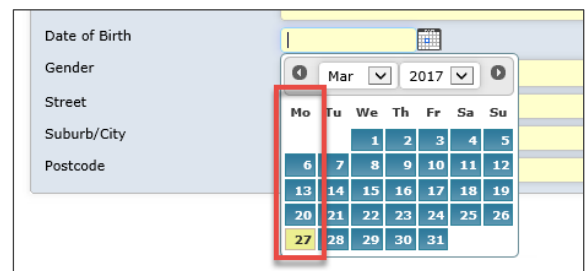
- **Change which day of the week is first on date pickers**
Significance: ● ○ ○ **Need for training:** ● ○ ○

A new Global Setting has been added to allow you to change which day of the week should be in the first column on date pickers. The default day is Sunday.

New Global Settings

The following Global Setting has been added:

Item Entry Defaults > 180) Date pickers should start the week on what day?



- **Restrict a user from editing a record unless they have the “Can do item entry” permission**
Significance: ● ● ○ **Need for training:** ● ○ ○

A new global setting has been added to allow you to determine whether a user should be able to modify a record when they do not have the user permission “Can do item entry”, but do have the permission “Can review own/subordinates entries”.

What this means in a practical sense is that you can setup a user who cannot enter new records, but can see existing records as they are granted permission to do so, and then determine whether the user should be able to modify those records or not.

New Global Settings

The following Global Setting has been added:

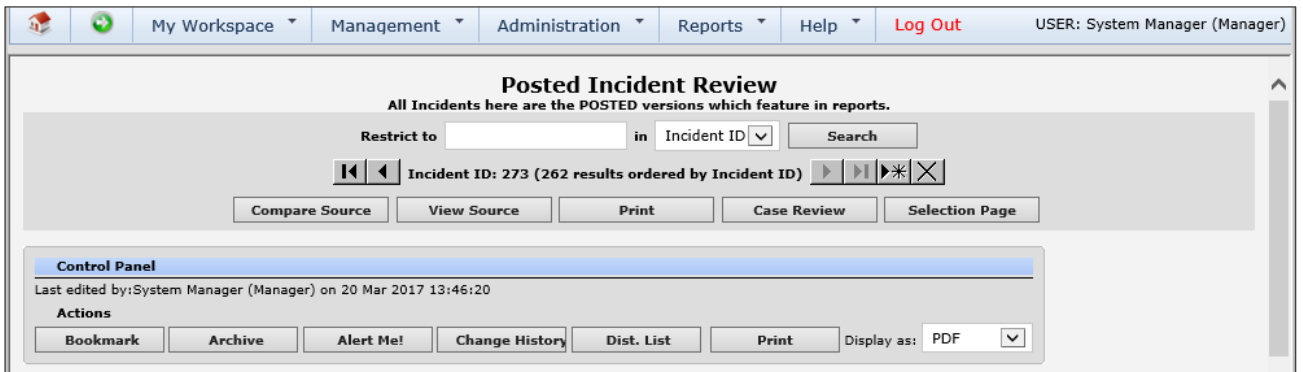
Item Entry Defaults > Item Version Management > 40) "Can review own/subordinates entries" edit mode when "Allow item entry" is OFF

It has 2 options:

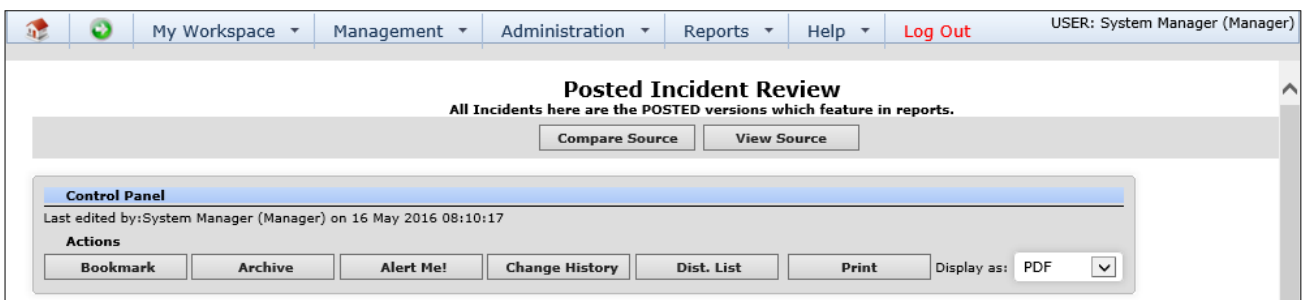
- Allow Edits even if "Allow item entry" is OFF
- Do Not Allow Edits unless "Allow item entry" is ON

- **The available functions when viewing a posted record have been modified**
Significance: ● ○ ○ **Need for training:** ● ○ ○

We have removed obsolete/confusing functionality from the top of the posted record review page:



The top of the old posted record review page

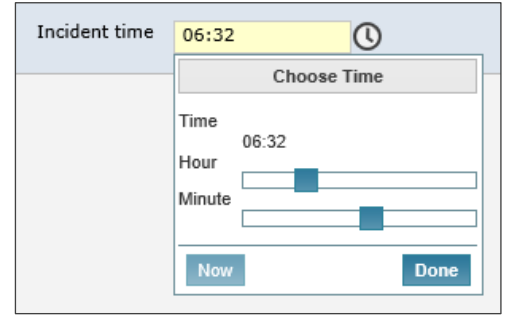


The posted record review page as seen in this version

- **The “Time Picker” tool has been disabled**
Significance: ● ○ ○ **Need for training:** ● ○ ○

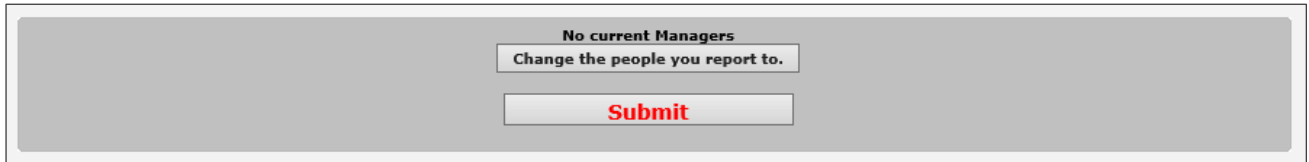
We have disabled the time picker tool that appears on time fields. Please note that the “clock” icon still appears as a visual cue, but is non-functional.

The time picker tool can be reinstated if desired, however this is a back-end configuration task which would need to be completed by RiskMan.

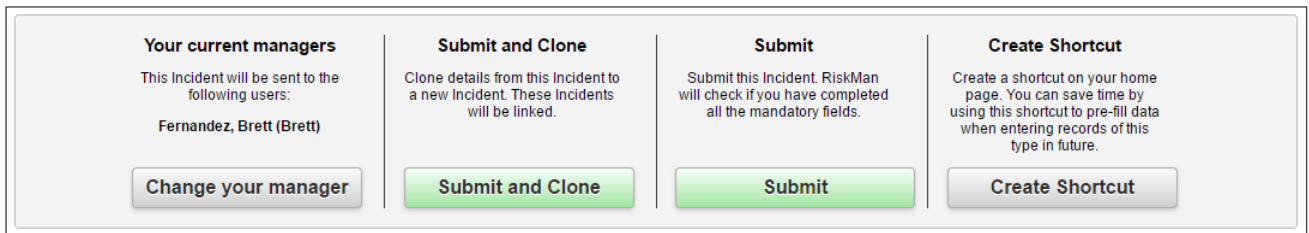


- **The record submission section and mandatory field check dialog have been modernised**
Significance: ● ○ ○ **Need for training:** ● ○ ○

At the bottom of the form is the grey record submission section (i.e. Submit / Save / Post buttons etc.). This section has been modernised, and a new button has been added – **Submit & Clone**. This button appears if the logged in user has the permission **Can created group entries**. When clicked, the initial record is saved, and a new, linked record form is presented to the user. This basically bypasses the confirmation screen to make the process of entering consecutive linked records quicker.

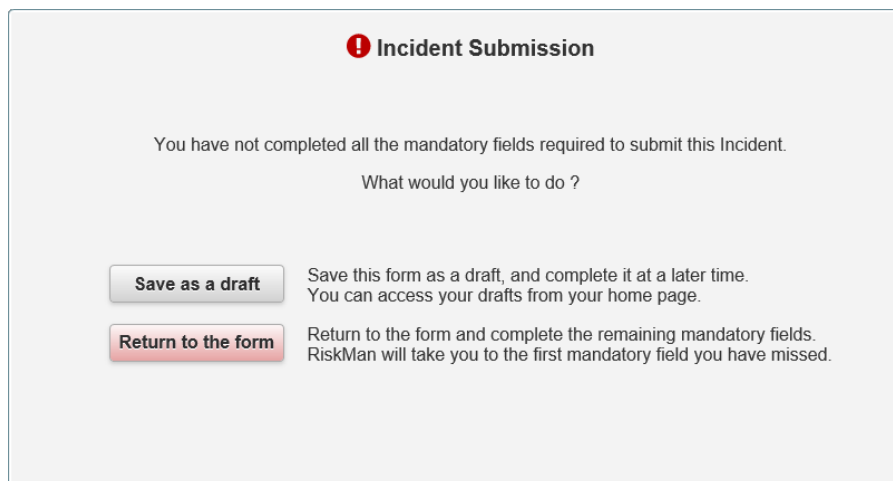


The old record submission section



The new record submission section, including the new “Submit & Clone” button.

The dialog displayed when the mandatory field check is performed has been modernised, and allows for new functionality introduced with the new Homepage:



These changes are not controlled by any settings, and will be applied automatically.

- **Tools like the Body Part Selector can now be displayed on the form instead of a separate dialog**
Significance: ● ○ ○ ○ **Need for training:** ● ○ ○ ○

It is now possible to display helper screens like the Body Part Selector in its own section on the data entry form, instead of it only being displayed as a pop up dialog.

Implementing this is a back-end configuration task which would need to be completed by RiskMan.

The Body Part Selector tool displayed in its own section on the Incident Entry form

- **Multi-select lists can now be displayed as multi-checkbox fields on the data entry form**
Significance: ● ○ ○ ○ **Need for training:** ● ○ ○ ○

It is now possible to display multi-select fields as a series of checkboxes on the data entry form, instead of in a pop up dialog.

Implementing this is a back-end configuration task which would need to be completed by RiskMan.

Left: Multi-select field displayed as a pop up dialog. Right: Multi-select list displayed as checkboxes on the data entry form

System Changes

The following changes relate to administrative functionality in the system.

System Event Logging

- **The Audit Log now captures a wider range of system events**
Significance: ● ● ○ **Need for training:** ● ○ ○

The Audit Log can now be configured to capture the following system events:

- When a user profile has been added
 - When a user profile has been modified, including when a user's password is changed
 - When a user profile has been deleted
 - When a template has been added
 - When a template has been modified
 - When a template has been deleted
 - Options selected when using the 'Apply Template Changes' page
 - When a new record (row) has been added to a list in List & Codes Maintenance
 - When a record has been modified in a list in List & Codes Maintenance
 - When a record has been deleted in a list in List & Codes Maintenance
 - When a qualitative report has been generated
- **You can now impose a limit on how long various system logging entries are stored**
Significance: ● ● ○ **Need for training:** ● ○ ○

Audit and error logs, along with sent emails, can now be automatically purged once each respective record type reaches a certain age.

New Global Settings

The following Global Settings have been added:

Scheduled Jobs > 100) Maximum age (days) of email entries

Scheduled Jobs > 110) Maximum age (days) of Error Log entries

Scheduled Jobs > 100) Maximum age (days) of Audit Log entries

These new Global Settings have a default value of 0, implying that the data should never be deleted.

General System Changes

- **The Global Settings page has been modernised and is now cross-browser compatible**
Significance: ● ○ ○ **Need for training:** ● ○ ○
- **The Login Page Editor has been modernised and user experience improved**
Significance: ● ○ ○ **Need for training:** ● ○ ○
- **The “Incident Record Count” data in the top right corner of the window can now be disabled**
Significance: ● ○ ○ **Need for training:** ● ○ ○

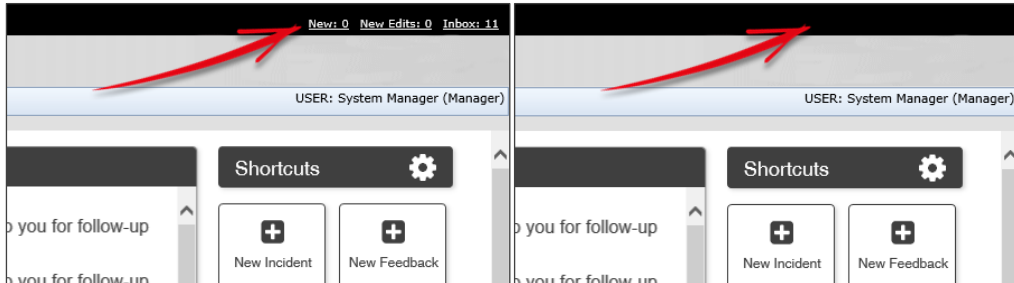
This feature harks back a long way – back to when RiskMan *only* consisted of an Incident register. The information shown here can be misleading in modern implementations of the system, as it is not specific to the

logged-in user; rather, across the whole system. In addition to that, the information was only regarding the Incident register.

New Global Setting

The following Global Setting has been added to control this feature:

Registers > Incidents > 280) Show Incidents Notifications in top right hand corner of home page?



Left: Global Setting set to “Yes” **Right:** Global Setting set to “No”

We would recommend hiding this feature to avoid confusing end users.

System Security

- **Numerous improvements to system security have been added**
Significance: ● ● ○ **Need for training:** ● ○ ○

We have introduced modern web application security techniques to improve the overall security of the application against various threats.

SQL Injection - refers to an injection attack, where an attacker can execute malicious SQL statements that control a web application's database server.

Cross-Site Scripting (XSS) - enables attackers to inject client-side scripts into web pages viewed by other users. A cross-site scripting vulnerability may be used by attackers to bypass access controls such as the same-origin policy.

Cross-Site Request Forgery (CSRF) - occurs when a malicious web site, email, blog, instant message, or program causes a user's web browser to perform an unwanted action on a trusted site for which the user is currently authenticated.

User Validation – checks for a valid logged in user in the system before granting access to any page