Introduction

This reference guide is aimed at Administrators who will be responsible for configuring and maintaining the RiskCat set of classifications to be used with Incident Entry and Incident Reports in RiskMan

What is RiskCat?

RiskCat is the tool which provides users entering incidents with the ability to select the nature of an incident e.g. Aggression, Falls, Medication Errors, Infection Control, Injuries, Pressure Ulcers. These listings are grouped up to 3 levels

- **Supergroups** (top level)
- **Classes** (second level)
- **Definitions** (third level)

Your RiskMan Administrator has full control over the content and layout of your RiskCat and a remapping tool to enable you to re-map existing posted and/or unposted incidents from old classifications to new classifications

The administration and management of these classifications is done through the 'Classification Editor' tool which includes the following options:

- Ability to add new, delete existing, or rename Supergroups, Classes and Definitions

- Design the layout of the RiskCat by changing the order in which the Supergroups are displayed as well as the order in which the accompanying classes and definitions are displayed within each Supergroup

- Specify the text and background colours for each Supergroup (and accompanying Classes and Definitions)

- Specify which Supergroups are not displayed for specific "Incident Involved" types

- Ability to re-map existing unposted and/or posted incidents to new supergroups/classifications/ definitions

Note: If you wish additional customisations that are not available in the standard Classification Editor e.g. certain incident fields or sections are only displayed based on a selected classification, please contact support at RiskMan - support@riskman.net.au

How do I access the Classification Editor?

The **'Classification Editor'** can be accessed by selecting *Administration -> Classification Editor* from the menu

How do I add a new Supergroup?

Option 1: Placing a new Supergroup at the bottom of the list of Supergroups

1. Click on the **Add New Supergroup** ❶ button

2. A Supergroup label **'New Supergroup'** ❷ will be added to the bottom of your list.
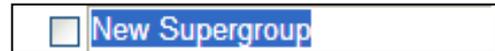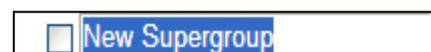

   Ensure that this label is selected (if not, double click the label) and enter the **Supergroup** name

3. Check mark the **Supergroup** to make it active

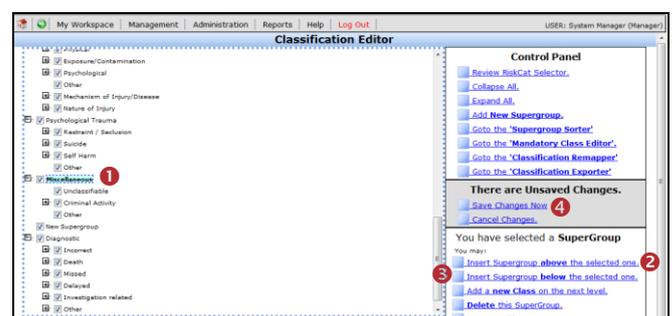4. Press **Save Changes Now** ❸ when ready to save
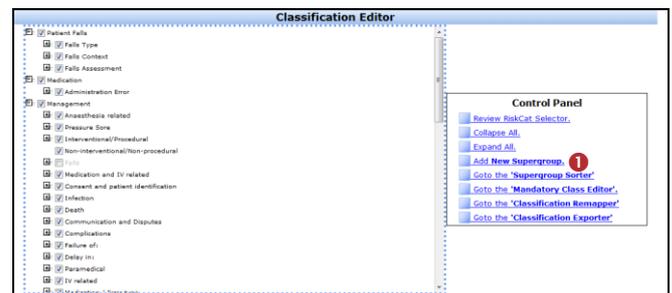
Option 2: Place the new Supergroup above or below a selected Supergroup

1. Highlight the Supergroup in the list ❶ where the new Supergroup is to appear above or below it, and the 'Control Panel' will expand to display extra options

2. Click on the respective **Insert Supergroup above the selected one** ❷ or **Insert Supergroup below the selected one** ❸ link. A new label **'New Supergroup'** will be added to the list. Ensure the label is selected (if not, double click the label) and enter your new **Supergroup** name

3. Check mark the **Supergroup** to make it active

4. Press **Save Changes Now** ❹ when ready to save

How do I add a new Class?

Option 1: Place a new Class at the end of a Supergroup listing

1. Highlight the Supergroup ❶ in the list where the Class is to appear under and the 'Control Panel' will expand to display extra options

2. Press the **Add a new Class on the next level** ❷ button and a new label **'New Class'** will be added to the bottom of the list.
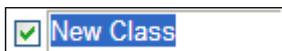
   ☑ New Class

   Ensure the label is selected (if not, double click the label) and enter your new **Class** name

3. Check mark the new **Class** to make it active

4. Press **Save Changes Now** ❸ when ready to save
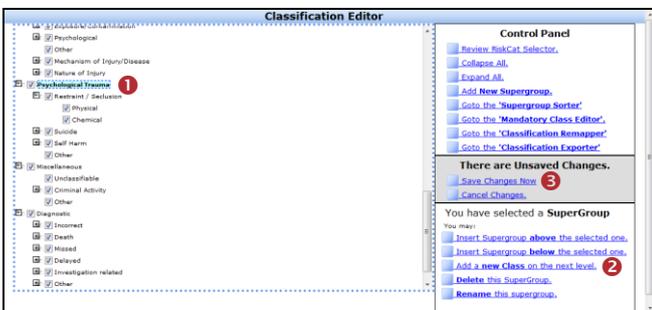
**Option 2: Place the new Class above or below a selected Class within a Supergroup**

1. Highlight the Class in the list where the new Class is to appear above or below it, and the 'Control Panel' will expand to display extra options

2. Click the respective **Insert a Class above the selected one** ❶ or **Insert a Class below the selected one** ❷ link.

   ☑ New Class

   A new label **'New Class'** ❸ will be added to the list.

   Ensure that this label is selected (if not, by double click the label) and enter your new **Classification** name

3. Check mark the new **Class** to make it active

4. Press **Save Changes Now** ❹ when ready to save
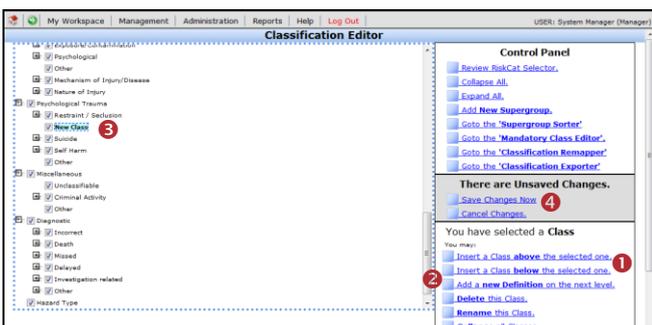
How do I add a new Definition?

Option 1: Place a new Definition at the end of a Class listing

1. Highlight the Class in the list ❶ where the Definition is to appear under and the 'Control Panel' will expand to display extra options

2. Press the **Add a new Definition on the next level** ❷ button and a new label **'New Definition'** will be added to the bottom of the list.
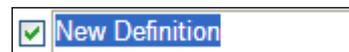
   ☑ New Definition

   Ensure the label is selected (if not, double click the label) and enter your new **Definition** name

3. Check mark the new **Definition** to make it active

4. Press **Save Changes Now** ❸ when ready to save

Option 2: Placing the new Definition above or below a selected Definition within a Class

1. Highlight the Definition in the list where the new Definition is to appear above or below it, and the 'Control Panel' will expand to display extra options

2. Click the respective **Insert a Definition above the selected one** ❶ or **Insert a Definition below the selected one** ❷ link. A new label **'New Definition'** ❸ will be added to the list.

   ☑ New Definition

   Ensure that this label is selected (if not, by double click the label) and enter your new **Definition** name

3. Check mark the new **Definition** to make it active

4. Press **Save Changes Now** ❹ when ready to save
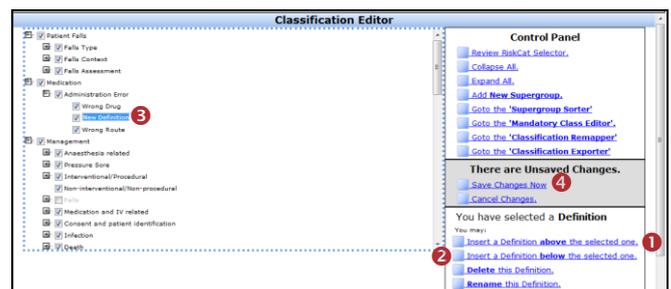
Mandatory Classes

There is an option to allow you to specify if a Supergroup/Class combination is to be a mandatory selection if it is displayed in the RiskCat

1. Click on the **Goto the Mandatory Class Editor** ❶ link in the 'Control Panel' of any of your Classification Editor pages

2. A new **Mandatory Class Editor** ❷ page will be displayed

3. Check mark the **Classes** ❸ that are to be mandatory if visible in RiskCat at the time the incident is being entered

4. Press **Save Changes Now** ❹ when ready to save
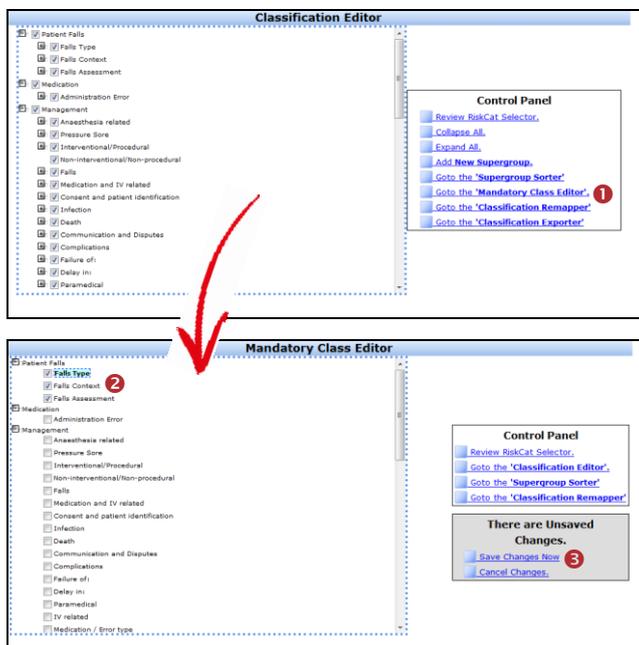
How do I rename a Supergroup, Class or Definition?

Option 1:

1. Double click the existing Supergroup, Class or Definition ❶ and enter the new label

2. Press **Save Changes Now** when ready to save

Option 2:

1. Highlight the Supergroup, Class or Definition ❶ in the list

2. Press the respective **Rename this Supergroup**, **rename this Class** or **Rename this Definition** link ❷ in the 'Control Panel' and enter the new label

3. Press **Save Changes Now** when ready to save
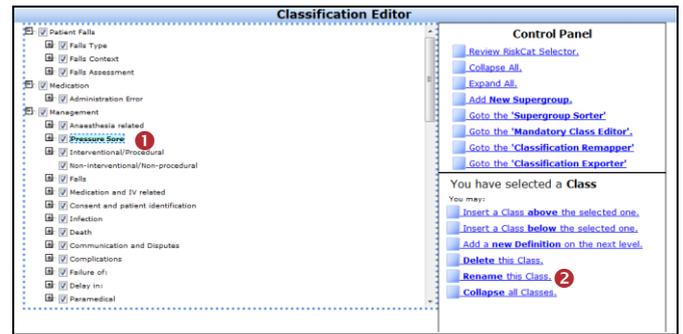
How do I delete a Supergroup, Class or Definition?

1. Highlight the Supergroup, Class or Definition ❶ in the list

2. Press the respective **Delete this Supergroup**, **delete this Class** or **Delete this Definition** link ❷ in the 'Control Panel'

3. A pop-up message ❸ will ask you to confirm or cancel the deletion

4. Press **Save Changes Now** when ready to save

Note: The pop-up message asking if you wish to continue with the deletion process will not display if you are deleting a Definition. The Definition will just delete from your list
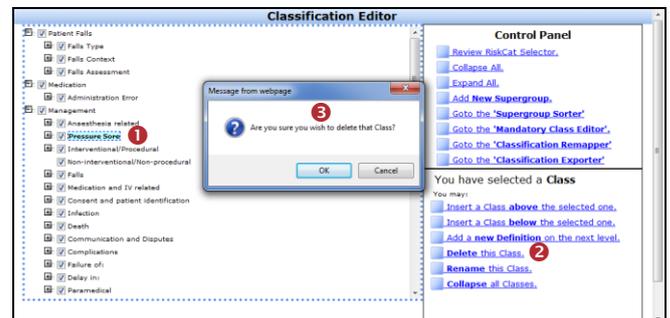
Can I change the layout of the RiskCat?

The order in which the Classes and Definitions appear in your RiskCat, as well as which Supergroup and/or Class they appear under can be done via the **'Classification Editor'** page. However, to re-arrange the layout of the Supergroups, this needs to be done via the **'Classification Supergroup Sorter'** page

To reposition the Classes and Definitions

1. Click on the respective Class or Definition in the list

2. Holding the mouse, drag to where you want it to appear

3. Release the mouse and the respective Class or Definition will be re-positioned accordingly

4. Press **Save Changes Now** when ready to save

Note: You can move a Class to appear under a different Supergroup and a Definition to appear under a different Class.

To reposition the Supergroups

1. Click on the **Goto the 'Supergroup Sorter' ❶** link.

2. This will take you to the **'Classification Supergroup Sorter'** page

3. To move a Supergroup, click on the icon next to the respective Supergroup and drag to the desired position

4. Press **Save Changes Now ❷** when ready to save

Can I view the changes I have made to RiskCat?

RiskCat, displaying all **active** Supergroups, Classes and Definitions, can be viewed by clicking on the **'Review RiskCat Selector' ❶** link which is available on **ANY** page accessed from the Classification Editor

Can I printout the RiskCat Classifications?

RiskCat, displaying all **active** Supergroups, Classes and Definitions, can be exported to Excel™ in spreadsheet format and printed from Excel™

To export your classifications, click on the **'Goto the Classification Exporter' ❶** link which is **ONLY** available on **'Classification Editor'** page

To export your classifications to Excel™, click on the **❷** icon. The classifications will display in spreadsheet format

What else does the 'Classification Supergroup Sorter' page do?

The **Classification Supergroup Sorter** page allows you to

• Specify the colour of the backgrounds and labels of your Supergroups and your Classes/Definitions

• Hide specific Supergroups when certain 'Incident Involved' types are selected in the Incident Notification e.g. you may only want to view specific hazard related classifications for Hazard incidents and OH&S related Supergroups for OH&S and staff incidents

• Specify if a selection from a Supergroup is mandatory if that Supergroup is displayed in RiskCat

• Specify if the classifications under a Supergroup are expanded to Class or Definition level or not expanded at all, by default

• Specify the alignment of your Supergroup titles e.g. left, right or centred

To access the Classification Supergroup Sorter page

Click on the **'Goto the Supergroup Sorter'** ❶ link on **ANY** of the Classification Editor pages
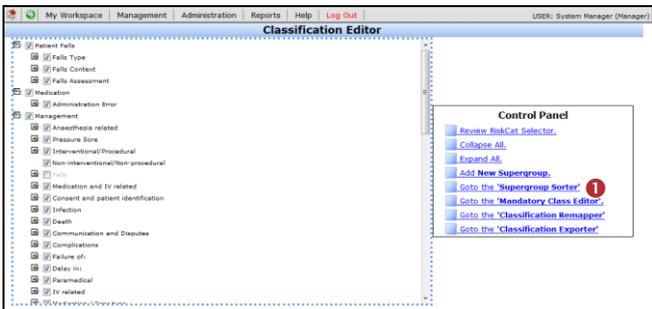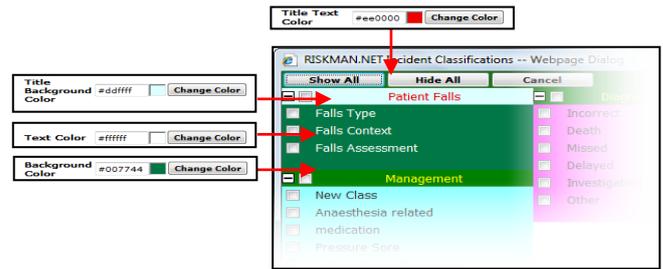

Modify the title text and background colours

1. Click on the **Supergroup** name

2. Click on the respective **Change Color** ❶ button and select a colour from the pop-up **Color Picker** ❷

3. If you know the colour code, type it next to the respective colour ❸ field or copy and paste from another Supergroup configuration
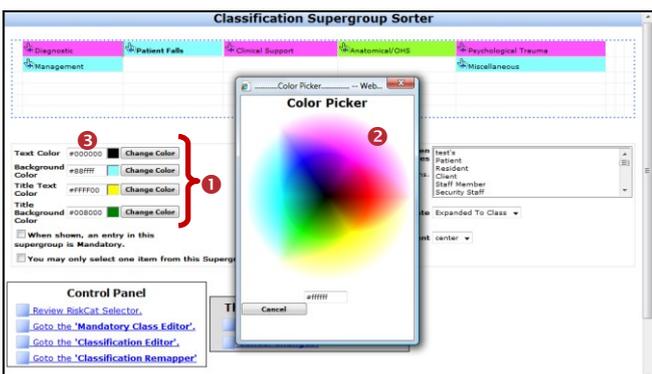
Example of how the colour selections affect your RiskCat

### Specify a Supergroup is mandatory when it is displayed in RiskCat

If a Supergroup is displayed, you can specify if it is a mandatory selection i.e. at least one of the classes and/or definitions needs to be selected before the incident can be submitted. To do this

1. Click on the Supergroup ❶ name that is to be made mandatory

2. Check mark the "When shown, an entry in this supergroup is mandatory" ❷ field

Specify if only one item may be selected from a Supergroup

Users can be restricted to only select one classification from a Supergroup. To do this

1. Click on the **Supergroup** ❶ name

2. Check mark the "You may only select one item from this Supergroup" ❸ field
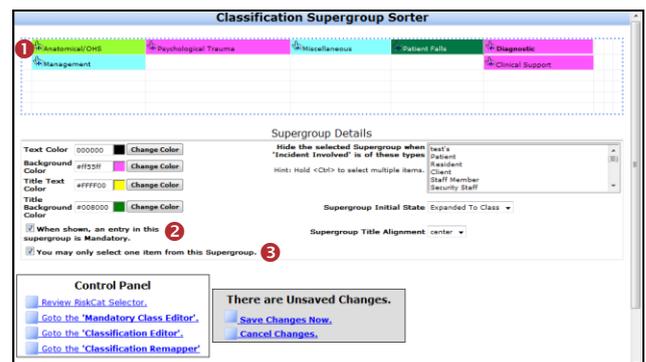
Altering the visual layout of your Supergroups

You are able to define the default layout for your Supergroups, including whether a Supergroup will display

- Fully collapsed, fully expanded, or expanded to the Class level and

- Left Justified, Right Justified or Centred

**To change the initial state of a Supergroup**

1. Click on the Supergroup ❶ name

2. Select the desired option from the **Supergroup Initial State** ❷ list box

   ❸ **Fully Expanded**: RiskCat will be expanded to Definition level (3rd level)

   ❹ **Expanded to Class**: Default setting where RiskCat is expanded to the Class level (2nd level). Users can expand to the 3rd level by clicking on an individual Class or by pressing **Show All**

   ❺ **Fully Collapsed**: RiskCat will not be expanded, and all that is viewed are the Supergroup headings. The user can then expand individual Supergroups to the Class and Definition levels or press **Show All** to fully expand all the classifications

   Suggestion: If you select "Fully Collapsed" position your Supergroups in one column - like a tree view. Refer to the section "How do I arrange my Supergroups into a tree view" for assistance

❹ Supergroup expanded to Class

❺ Supergroup fully collapsed

❸ Supergroup expanded to Definition
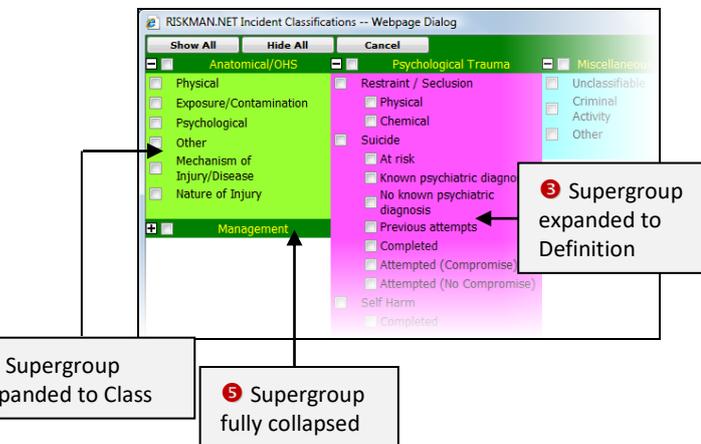
To change the title alignment for a Supergroup

1. Click on the **Supergroup** ❶ name

2. Select the desired alignment from the **Supergroup Title Alignment** ❷ dropdown box

Left aligned

Centred

Right aligned
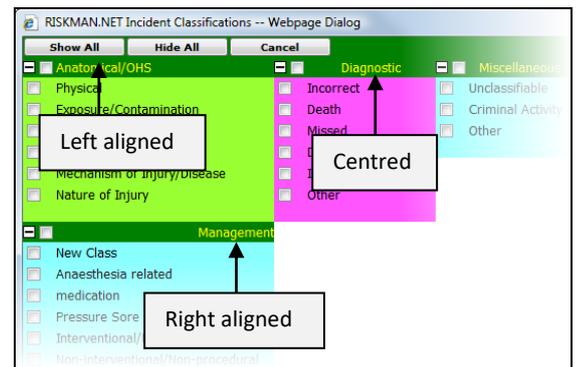
Supergroups can be hidden based on selected 'Incident Involved' types

Supergroups can be hidden based on a selected 'Incident Involved' type. For example, you may only want to show specific clinical Supergroups for Patient/Client/Resident incidents and OH&S specific Supergroups for Staff incidents

1. Click on the **Supergroup** ❶ name

2. Next to the **Hide the selected Supergroup when 'Incident Involved' is of** these **types** ❷, highlight the 'Incident Involved' types that you wish this Supergroup to be **HIDDEN**
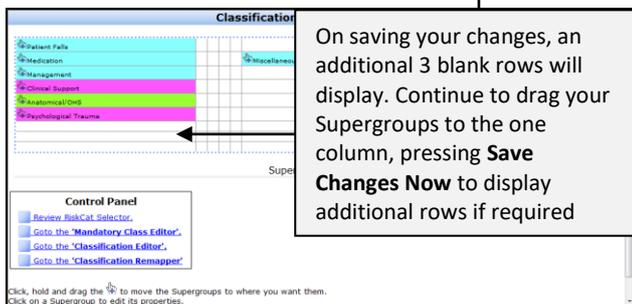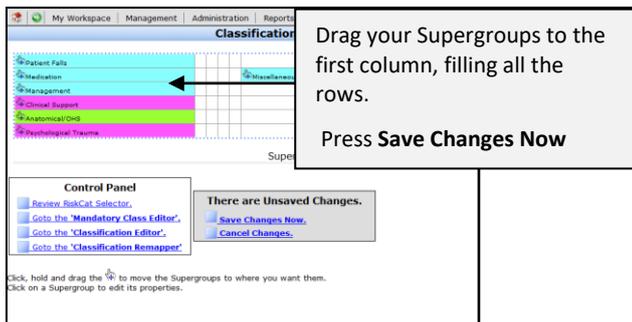
Note: Hold your CTRL key when selecting more than one type
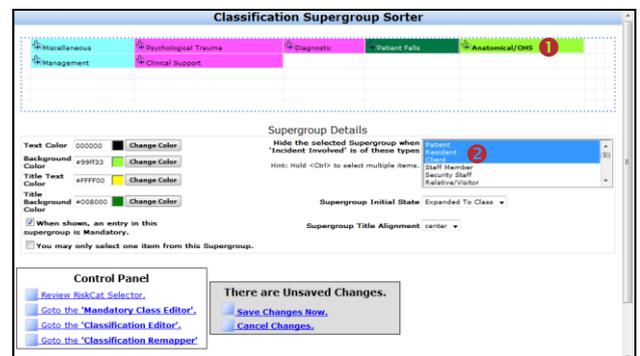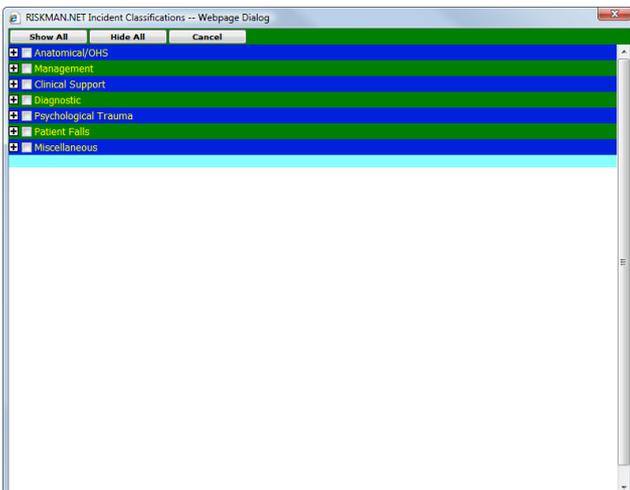
How do I arrange my Supergroups into a tree view?

1. Drag the Supergroups into the first column, until there are no rows left and press **Save Changes Now**

   You will notice that 3 additional blank rows appear

2. If you have more Supergroups to arrange continue to drag your Supergroups to the blank rows. Once these rows are filled with Supergroups you will need to press **Save Changes Now** again if you wish view an additional 3 blank rows

3. Continue with the above steps until you have dragged all your Supergroups to the one column

   *Suggestion: If you wish to display your Supergroups in one column, change the **Supergroup Initial State = Fully Collapsed** to enable a tree view. In this way a user will not see all the classifications at once and can expand individual Supergroups and Classes to see the list of respective Definitions*

Drag your Supergroups to the first column, filling all the rows.

Press **Save Changes Now**

On saving your changes, an additional 3 blank rows will display. Continue to drag your Supergroups to the one column, pressing **Save Changes Now** to display additional rows if required

Example of your RiskCat arranged in a tree view

Example of one of the Supergroups expanded in RiskCat

To view the Classes & Definitions under a Supergroup, click on the respective **Expand [+]** button
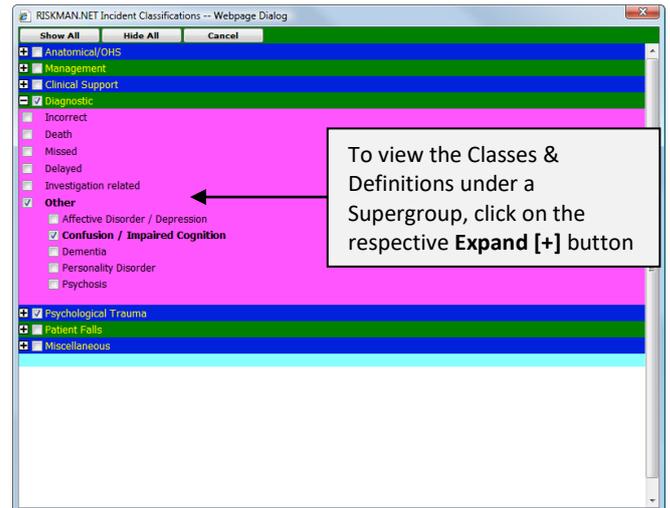
What happens to my existing incidents if changes are made to RiskCat?

If you make changes to the classifications in RiskCat your existing incidents (unposted and posted) will still retain the classifications originally selected.

It is **STRONGLY RECOMMENDED** that you re-map your existing **posted** incidents (where applicable) to your new classification set. This is to ensure that you have consistency with your Incident Reporting. It is not necessary to re-map your unposted incidents as you may like to keep the originally selected classifications for historical purposes.

Re-mapping of RiskCat classifications can be done through the re-mapping tool which is available from any of the Classification Editor pages

To access the Classification Re-Mapper page

Click on the **Goto the Classification Remapper** ❶ link in the respective 'Control panel'

**Re-mapping Incidents to New Classifications**

To only view a list of the classifications no longer active in the modified RiskCat for **Posted Incidents**, uncheck

☐ Apply to both Posted and Unposted(otherwise just Posted). ❶

To view a list of the classifications no longer active in the modified RiskCat for **Posted and Unposted Incidents** check

☑ Apply to both Posted and Unposted(otherwise just Posted). ❶

In both cases the list of "orphaned" classifications (ie. no longer available in RiskCat) will display in the left hand column labled **"Existing Classfications"** ❷
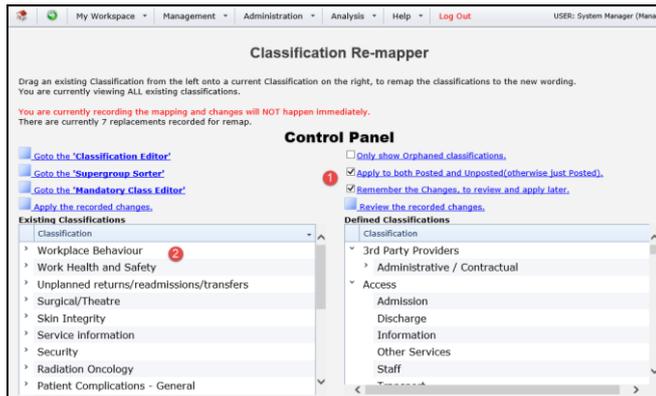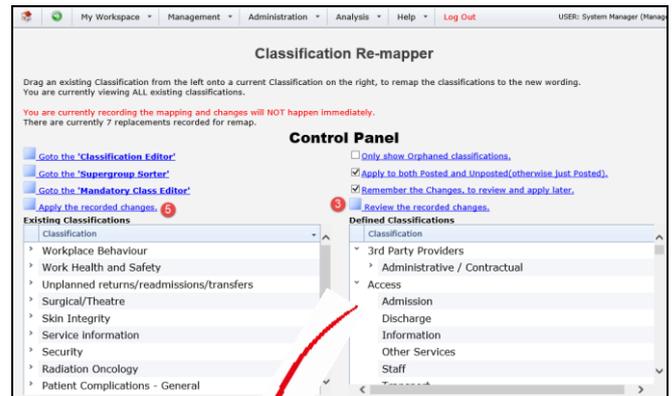

To re-map the existing classes/definitions to the modified active RiskCat

1. Click on the class or definition from the **Existing Classifications** ❶ list and holding your mouse, drag it over the top of the Class or Definition that you wish to re-map to in the **Defined Classification** ❷ list

2. For each class/definition that is re-mapped, it will be removed from the **Existing Classifications** list. Once all the classes/definitions are re-mapped for the selected Supergroup listing, it will disappear from the **Existing Classifications** list

    Note: Ideally there should be no classifications listed in the Existing Classifications list for posted incidents after you have done the re-mapping
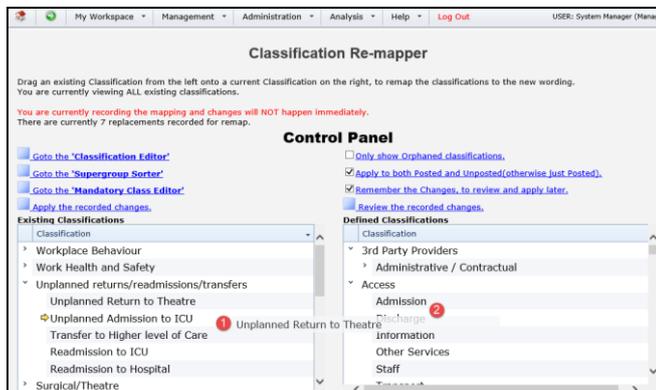
3. Before you apply the changes check your changes by clicking on the **Review the recorded changes** ❸ link. A pop-up spreadsheet will display your changes.

4. If a re-mapping is not correct, click on the respective **Delete** ❹ button. The classification will be available to re-map again from the **Existing Classifications** list

5. Once you are happy with the re-mapping changes that you have done, click on the **Apply the recorded changes** ❺ link. The re-mapping will not take long

6. Once it is finished the **Apply the recorded changes** link will no longer be visible on the **'Classification Re-mapper'** page