- Roam & Roam Script Builder -

FOR RISKMAN VERSION 18.07

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INTRODUCTION

How does it all work?

The RiskMan **Roam app** has been designed to allow users to easily capture data using mobile devices.

In order to facilitate this, you need to determine exactly which data you want them to collect.

For example, you may wish to enable your users to capture incidents using the app. However, your incident entry form (presumably for default users) might have a large number of fields – more than 50, depending on your system configuration and Template settings. Obviously it would be impractical to force users to fill in so many fields using their mobile device; after all, the intent is generally to enable *quick* data capture.

What you need to do is create a **script**, using the **Roam Script Builder** – the administrative component of the overall process. A script contains **paths**, which in turn contain the fields you want your users to complete when they use the Roam app, and also all of the settings required; in this scenario, you could look at the script as a simplified version of your “Default” incident User Template.

So far, we have:

A user’s **mobile device** with the **Roam app** installed (we’ll just refer to this as the **app** from now on for simplicity).

The **Roam Script Builder**, which is a feature in your RiskMan system.

A **Script**, which defines what data you want your users to collect when they use the **app**. The data is arranged into **paths**.

The next step is to get the **script** you create into the hands of your users, so they can start recording data.

To do this, a user needs to open the **app**, and register their current device. Once registered, the **app** will automatically download your **script**. The user can then start recording data. We’ll explain more about registration later.

Exactly how the app downloads the script you create is important, and we'll try to explain that now in terms which (hopefully) aren't too technical.

When you create a **script**, you will also define a **passkey**. The passkey is usually just a logical name for your script, for example "CompanyNameRoam2018". Once you're happy with the script you've created, its **passkey** is then stored on the **RiskMan Verification Server** (or RVS for short). The **RVS** is a secure server which is accessible via the internet. When a user installs the Roam app on their device, they will use the **passkey**, along with their RiskMan username and password, in order to determine that they are a valid user, and that their device should download the specific **script** that you created for them.

Now we also have:

The **RiskMan Verification Server** (**RVS**), which authenticates **app users** as being part of your organisation

The **passkey**, which is a property of the script you create. You will need to communicate the passkey to your users to allow them to use the app.

The final piece of the puzzle is **RoamConnect**, which is a function that runs on your organisation's servers. This is a secure service that acts as the go-between for your RiskMan system and your app users.

Ordinarily, a system such as RiskMan would be contained on your internal network, and never exposed to the internet. **RoamConnect** is the bridge that allows your users to send data via the internet, and safely pass that into your RiskMan system as a new record, thereby keeping your RiskMan system safe and private.

Finally:

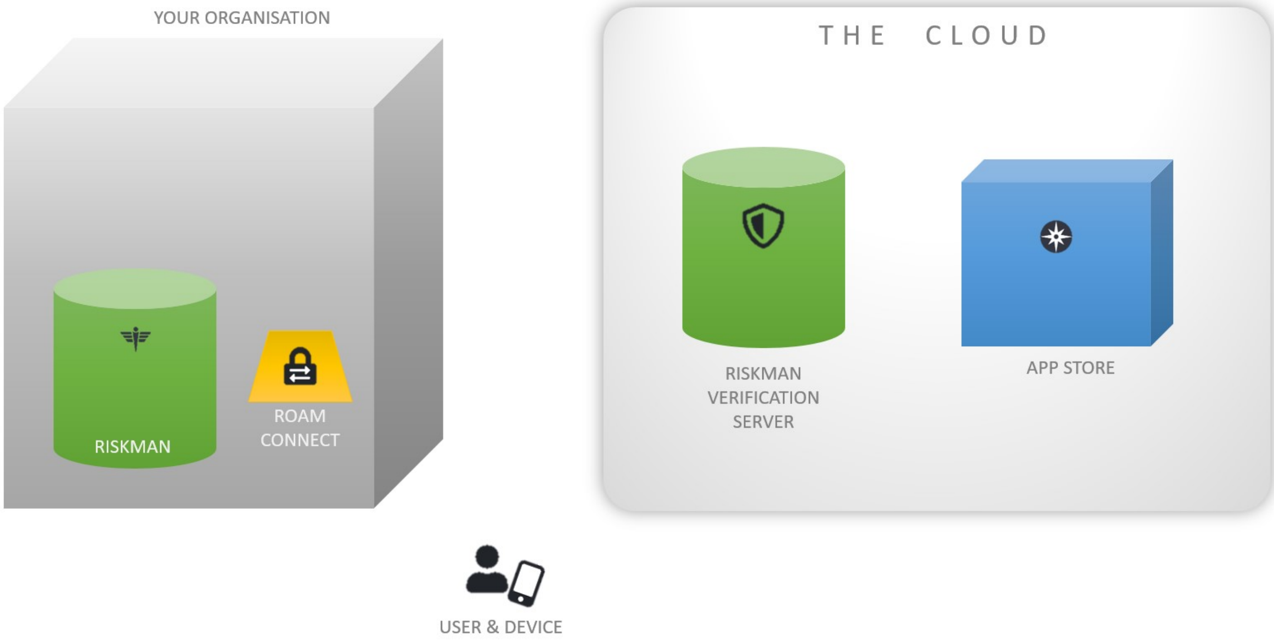
RoamConnect, which allows your users to safely and securely transmit data from the **app** to your RiskMan system.

You need to supply the **passkey** to your **app users** so that they can register their devices. One way to do this might be by sending it in an email, along with instructions of what the users need to do.

Once a user has the passkey, they will use that, plus their usual RiskMan username and password to verify their identity. The app then talks directly to RoamConnect to download your script to the Roam app, and your users are now ready to go!

Let's look at all of that information diagrammatically:

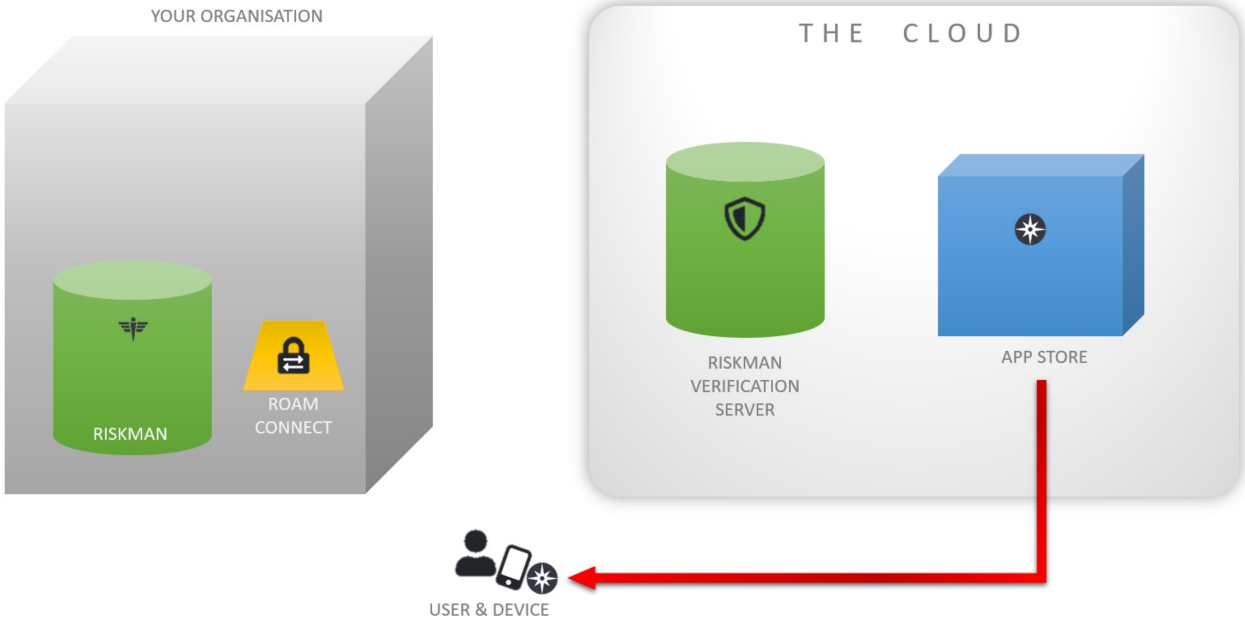
Step 1


YOUR ORGANISATION
RISKMAN
ROAM CONNECT
THE CLOUD
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

Above, we can see your organisation. Within your organisation is your **RiskMan system**, and **RoamConnect**.

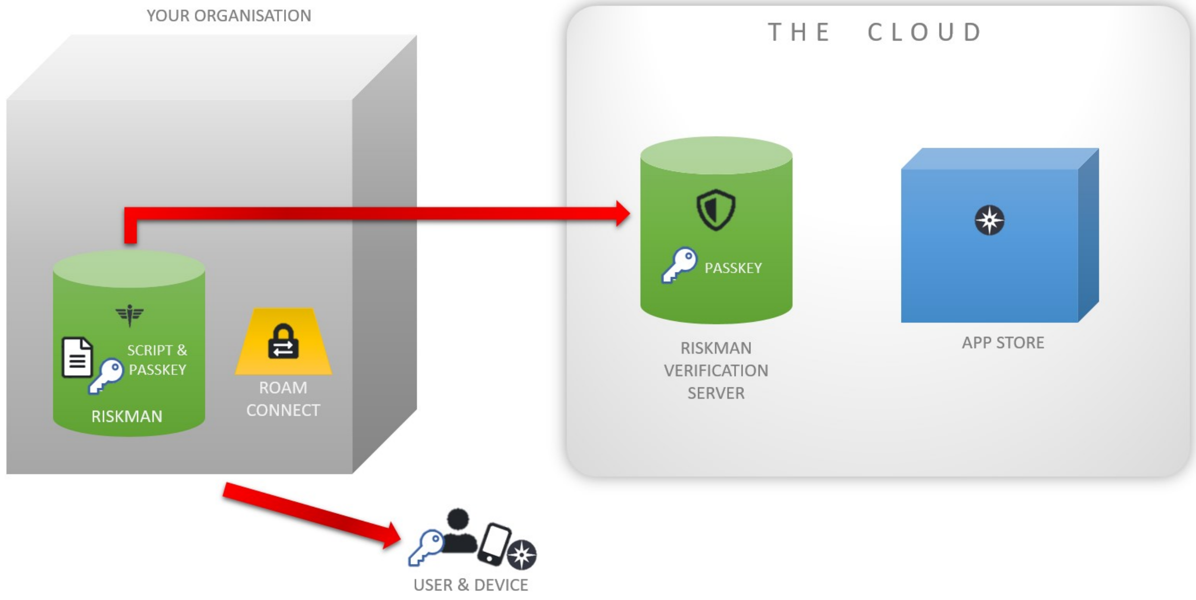
In the cloud, you can see the **RVS**, and **app store**. Finally, there is a **user** with their **device**.

Step 2


YOUR ORGANISATION
RISKMAN
ROAM CONNECT
THE CLOUD
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

The user needs to get **Roam** on to their device; they can either download it themselves from the respective **app store**, or your IT team can deploy it to company-owned devices.

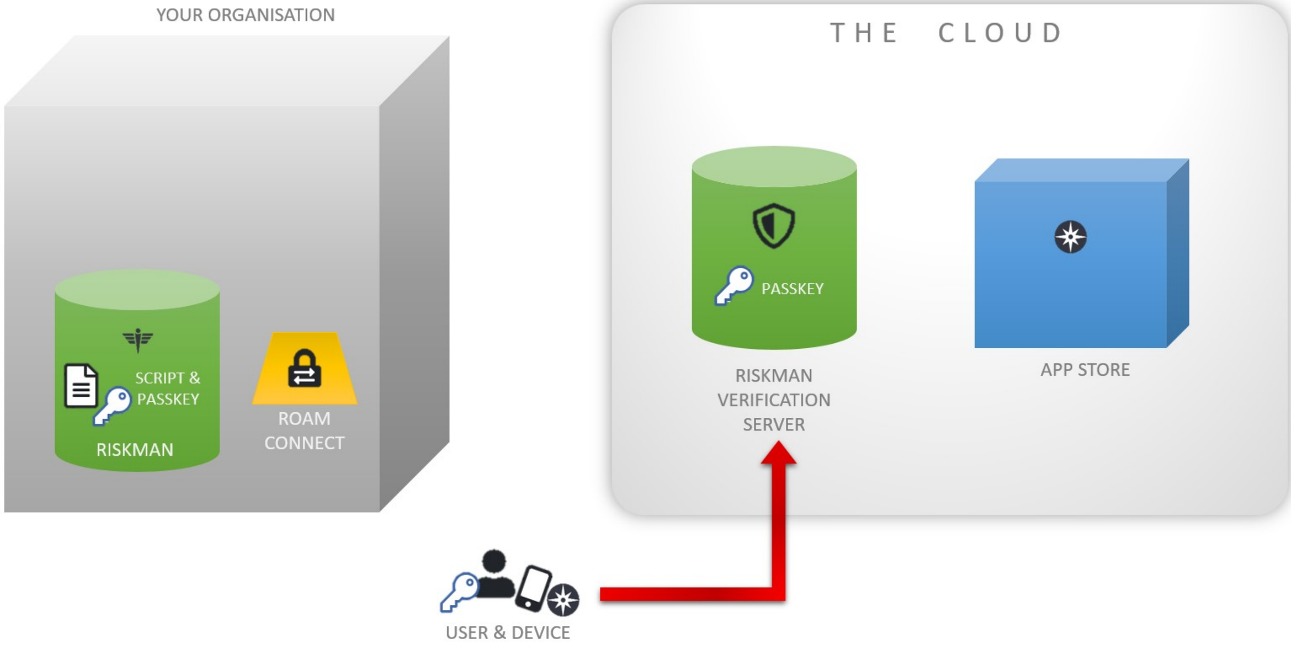
Step 3


YOUR ORGANISATION
SCRIPT & PASSKEY
RISKMAN
ROAM CONNECT
THE CLOUD
PASSKEY
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

Once you have created your **script**, along with its **passkey**, you will publish it. The **passkey** will be sent to the **RVS**.

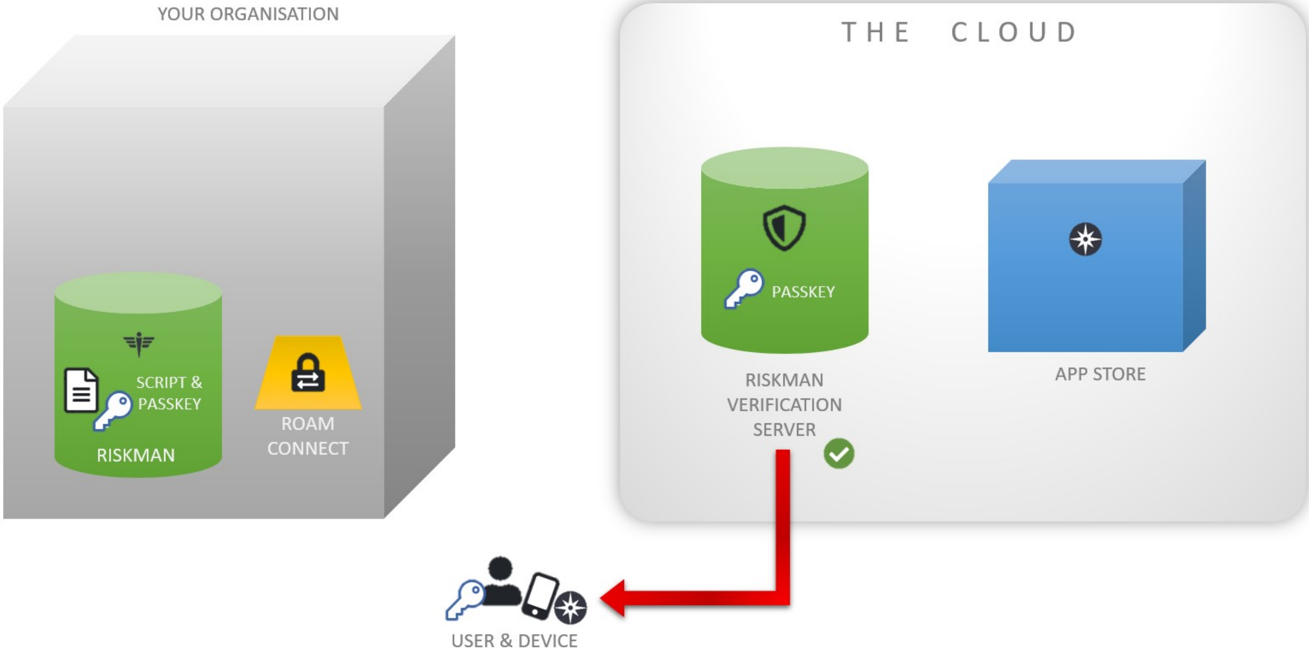
You will also need to send the passkey to the user.

Step 4


YOUR ORGANISATION
SCRIPT & PASSKEY
RISKMAN
ROAM CONNECT
THE CLOUD
PASSKEY
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

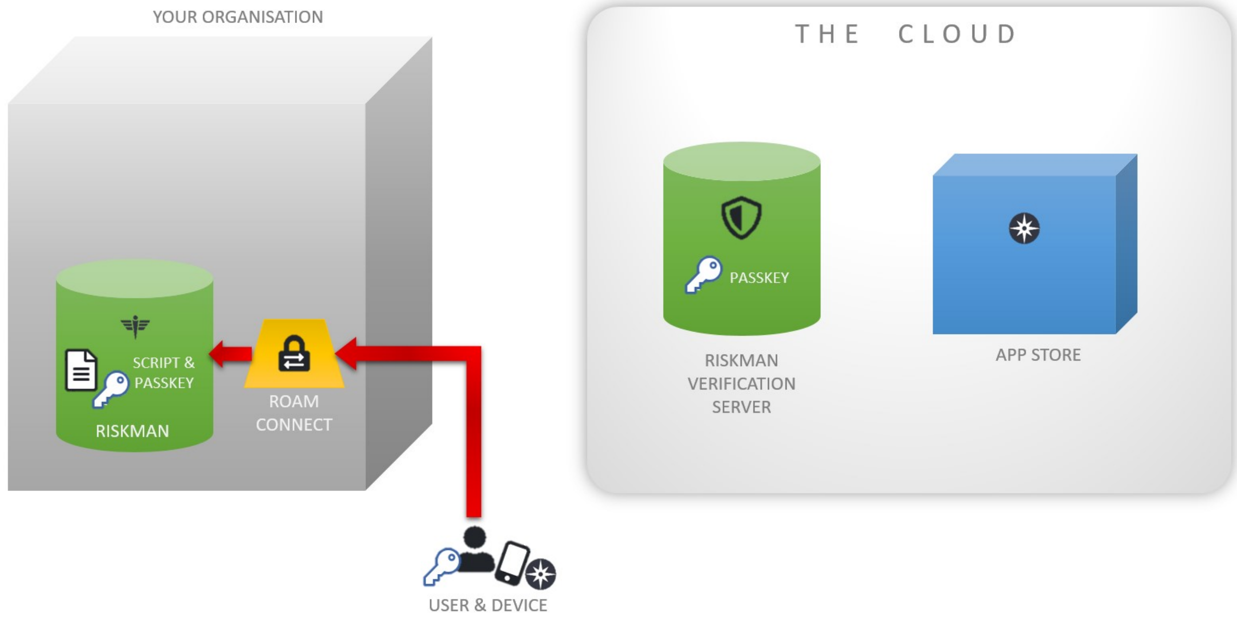
The user will then enter the **passkey** and their login details into the **Roam app**. The app talks to the **RVS** to check that the passkeys match.

Step 5


YOUR ORGANISATION
SCRIPT & PASSKEY
RISKMAN
ROAM CONNECT
THE CLOUD
PASSKEY
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

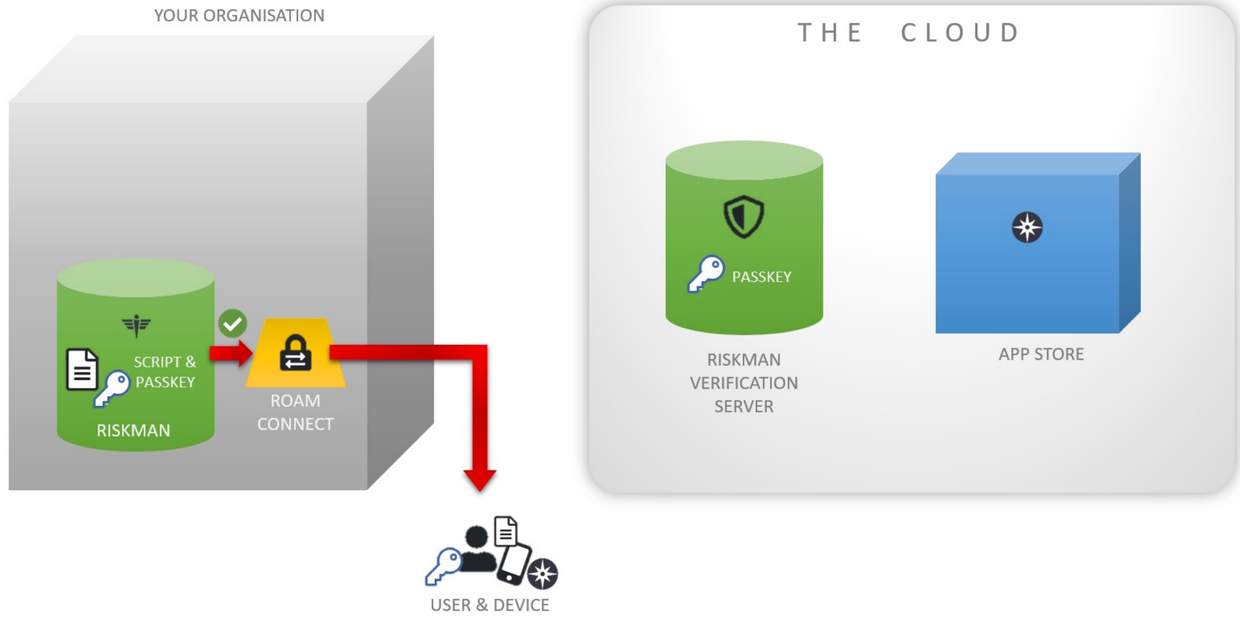
Once verified, the **RVS** sends the app on the user's device the information required to talk to **RoamConnect** in your organisation.

Step 6


YOUR ORGANISATION
SCRIPT & PASSKEY
RISKMAN
ROAM CONNECT
THE CLOUD
PASSKEY
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

The **app** then talks to **RoamConnect** in your organisation to verify their username and password.

Step 7


YOUR ORGANISATION
SCRIPT & PASSKEY
RISKMAN
ROAM CONNECT
THE CLOUD
PASSKEY
RISKMAN VERIFICATION SERVER
APP STORE
USER & DEVICE

Once the credentials are verified, the **script** is downloaded to the **user's device** and they are ready to go.

Please note that steps 4 to 7 usually take just a few seconds to complete!

When the user has new records to transmit, the app will talk to RoamConnect securely to send that information to your RiskMan system. Users can capture new records when they are offline; they will be stored on their device, and transmitted when they next have an active data connection (be it WiFi or cellular).

About the Roam app

The Roam app is available for iOS (Apple) and Android devices. The app can be found and downloaded to your device by searching for “riskman roam” or even just “roam” in your preferred app marketplace. There is no charge to download and use the app.

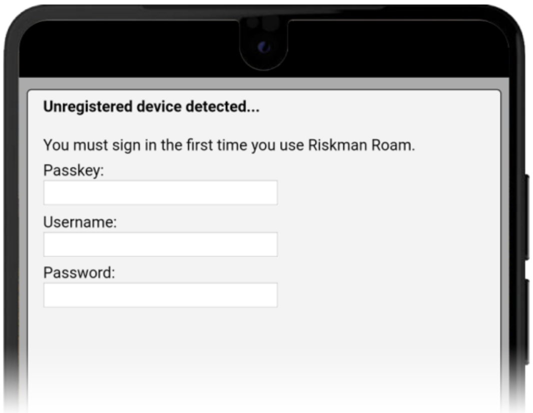
The app is designed so that the user experience between iOS and Android devices is essentially identical.

The minimum operating system requirements to use Roam on a mobile device are:

- **iOS 10** for Apple devices
- **Marshmallow (Version 6.0)** for Android devices

Though the app can be freely downloaded and installed on a device, users will not be able to capture any data until you have setup and deployed your required script(s) using the Roam Script Builder.

Registering to use the app



Unregistered device detected...

You must sign in the first time you use Riskman Roam.

Passkey:

Username:

Password:

After Roam is installed on a mobile device, users will need the following in order to authenticate themselves before they can capture data:

- **Passkey** – a unique text string that identifies a user as belonging to your organisation, and subsequently allows the app to use your **RoamConnect** service via the internet. The passkey is defined by you and needs to be provided to all staff who wish to use the app.
- **Username & Password** – the user’s existing username and password to login to RiskMan.

Once a user has successfully registered their device, they no longer need to sign in when they want to use the app.

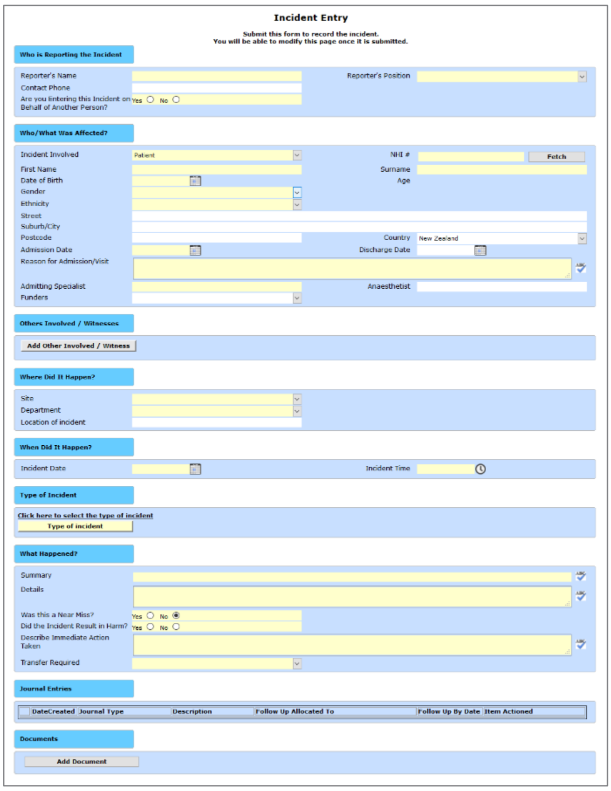
Roam Script Builder: Defining your users’ experience

You are in total control of what users will see when they use the app – you can make the experience a good one, or you can make it a poor one.

We’re going to use a reasonably simple incident register throughout this document to explain how to use the Roam Script Builder.

As mentioned earlier in this document, in many situations you will not want to force the users to capture *all* of the fields they would need to complete if they were entering data via a computer.

The incident entry form, as seen by Default users, is shown to the right. With almost 40 fields being shown, and the majority of them mandatory, it can be argued that forcing the user to complete all of them on a mobile device would be onerous and/or time-consuming.



Incident Entry

Submit this form to record the incident.
You will be able to modify this page once it is submitted.

Who is Reporting the Incident

Reporter’s Name
Reporter’s Position
Contact Phone
Are you Entering this Incident on Behalf of Another Person? Yes ○ No ○

Who/What Was Affected?

Incident Involved: Patient
NHI #
Fetch
First Name
Surname
Date of Birth
Age
Gender
Ethnicity
Street
Suburb/City
Postcode
Country: New Zealand
Admission Date
Discharge Date
Reason for Admission/Visit
Admitting Specialist
Anaesthetist
Funders

Others Involved / Witnesses

Add Other Involved / Witness

Where Did It Happen?

Site
Department
Location of incident

When Did It Happen?

Incident Date
Incident Time

Type of Incident

Click here to select the type of incident
Type of incident

What Happened?

Summary
Details
Was this a Near Miss? Yes ○ No ●
Did the Incident Result in Harm? Yes ○ No ○
Describe Immediate Action Taken
Transfer Required

Journal Entries

	DateCreated	Journal Type	Description	Follow Up Allocated To	Follow Up By Date	Item Actioned

Documents

Add Document

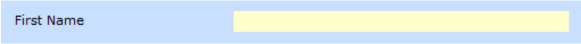
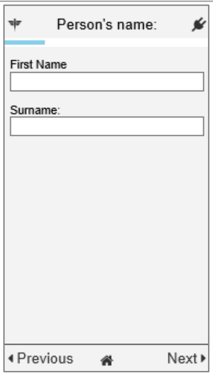
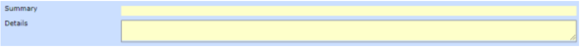
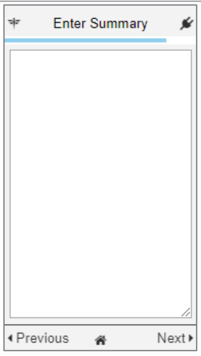
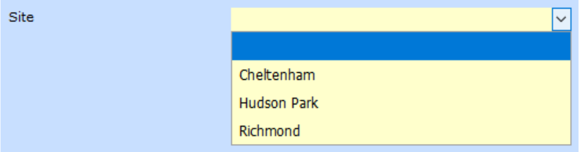
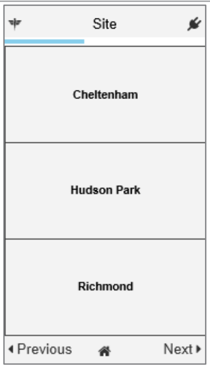
Instead, we want to specify that only certain fields need to be entered via the app - therefore, preparation is key.

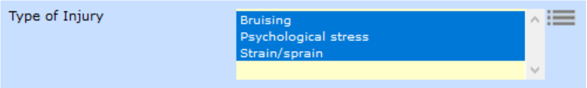
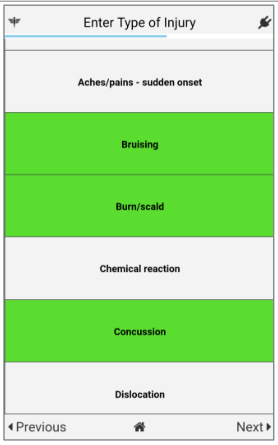
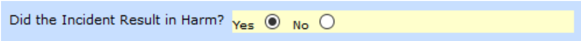
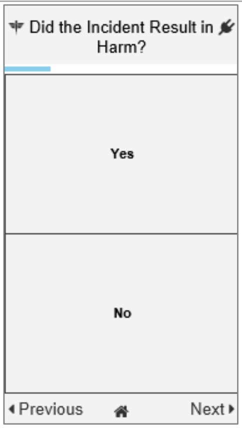
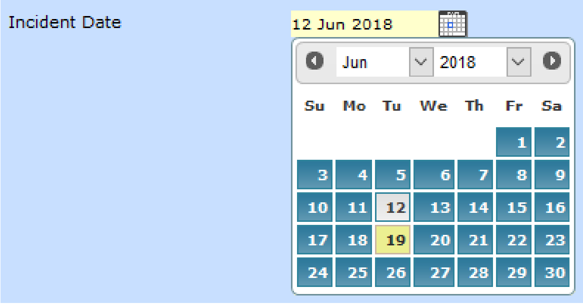
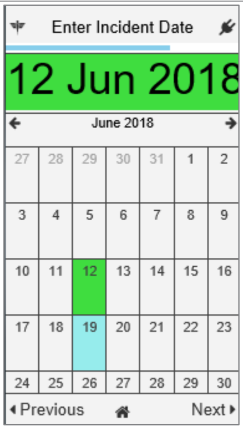
In situations like this, we’d strongly recommend that you do not start in the Script Builder; rather, start with the actual data entry form. Scan through all of the fields and make a list of the fields that you want in the app.

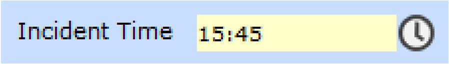
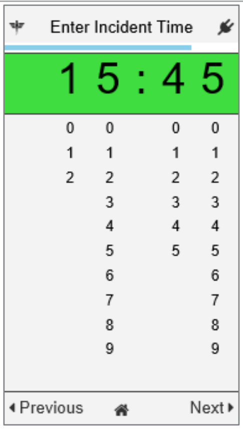
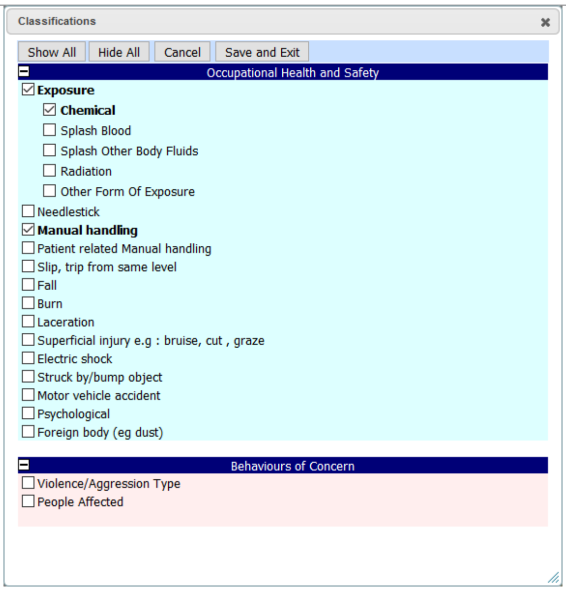
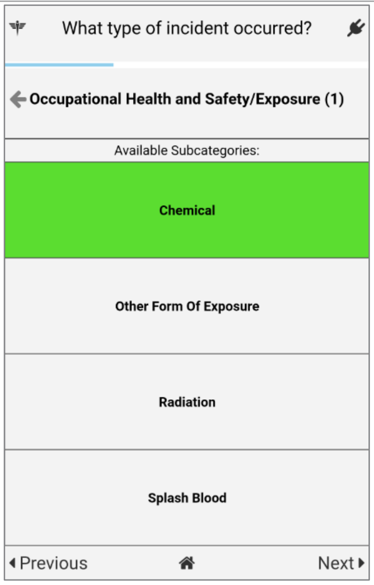
Having a goal to work towards will make the process of using the Script Builder *much* easier.

Which field types are supported in the Roam app?

The following fields can be included in scripts that you create:

FIELD TYPE	APPEARANCE IN RISKMAN	APPEARANCE IN ROAM
Free text		 Person's name: First Name Surname: Previous Next
Text area	 Summary Details	 Enter Summary Previous Next
Drop down list	 Site Cheltenham Hudson Park Richmond	 Site Cheltenham Hudson Park Richmond Previous Next

Multi-select	 Type of Injury Bruising Psychological stress Strain/sprain	 Enter Type of Injury Aches/pains - sudden onset Bruising Burn/scald Chemical reaction Concussion Dislocation Previous Next
Yes / No and radio buttons	 Did the Incident Result in Harm? Yes ● No ○	 Did the Incident Result in Harm? Yes No Previous Next
Date	 Incident Date 12 Jun 2018	 Enter Incident Date 12 Jun 2018 June 2018 Previous Next

Time	 Incident Time 15:45	 Enter Incident Time 1 5 : 4 5 0 0 0 0 1 1 1 1 2 2 2 2 3 3 3 4 4 4 5 5 5 6 6 7 7 8 8 9 9 Previous Next
Classification	 Classifications Show All Hide All Cancel Save and Exit Occupational Health and Safety ☑ **Exposure** ☑ **Chemical** ☐ Splash Blood ☐ Splash Other Body Fluids ☐ Radiation ☐ Other Form Of Exposure ☐ Needlestick ☑ **Manual handling** ☐ Patient related Manual handling ☐ Slip, trip from same level ☐ Fall ☐ Burn ☐ Laceration ☐ Superficial injury e.g : bruise, cut , graze ☐ Electric shock ☐ Struck by/bump object ☐ Motor vehicle accident ☐ Psychological ☐ Foreign body (eg dust) Behaviours of Concern ☐ Violence/Aggression Type ☐ People Affected	 What type of incident occurred? **Occupational Health and Safety/Exposure (1)** Available Subcategories: **Chemical** **Other Form Of Exposure** **Radiation** **Splash Blood** Previous Next

The following field types currently can’t be utilised in a Roam script:

- Subforms
- Journals
- Associated risks
- Any other multi-select pop up screens
- Visual selection tools, e.g. the body part selector

THE SCRIPT BUILDER INTERFACE

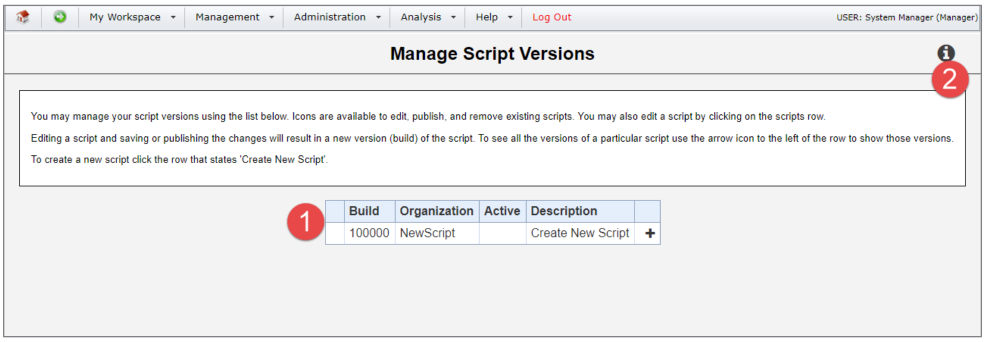
Script Versions page

To access the Roam Pathbuilder, a user must have the following user permission:

- General > Administrative Permissions > **Can manage Roam Script Builder**

Access the Roam Script Builder by navigating to *Administration > Roam > Roam Script Builder*.

The first thing you will see is the Script Versions Page:



Manage Script Versions

You may manage your script versions using the list below. Icons are available to edit, publish, and remove existing scripts. You may also edit a script by clicking on the scripts row.

Editing a script and saving or publishing the changes will result in a new version (build) of the script. To see all the versions of a particular script use the arrow icon to the left of the row to show those versions.

To create a new script click the row that states 'Create New Script'.

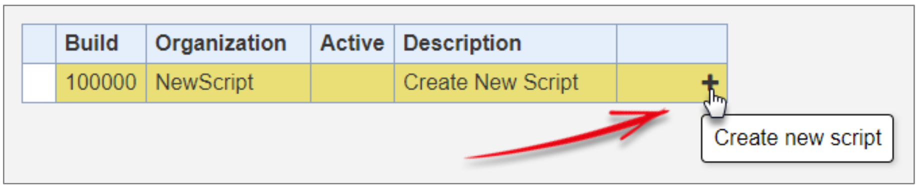
	Build	Organization	Active	Description	
	100000	NewScript		Create New Script	+

❶ This table is empty in the beginning, but is where the scripts you create will be stored. We'll explain the meaning of each column in the table after we've created a basic script.

❷ The info icon shows and hides the help text in the white box at the top of the page.

Later, once we have at least one script saved, there will be further options available on this page.

To create a new script, click the + icon in the first row of the table:



	Build	Organization	Active	Description	
	100000	NewScript		Create New Script	+

CREATING A BASIC, LINEAR PATH

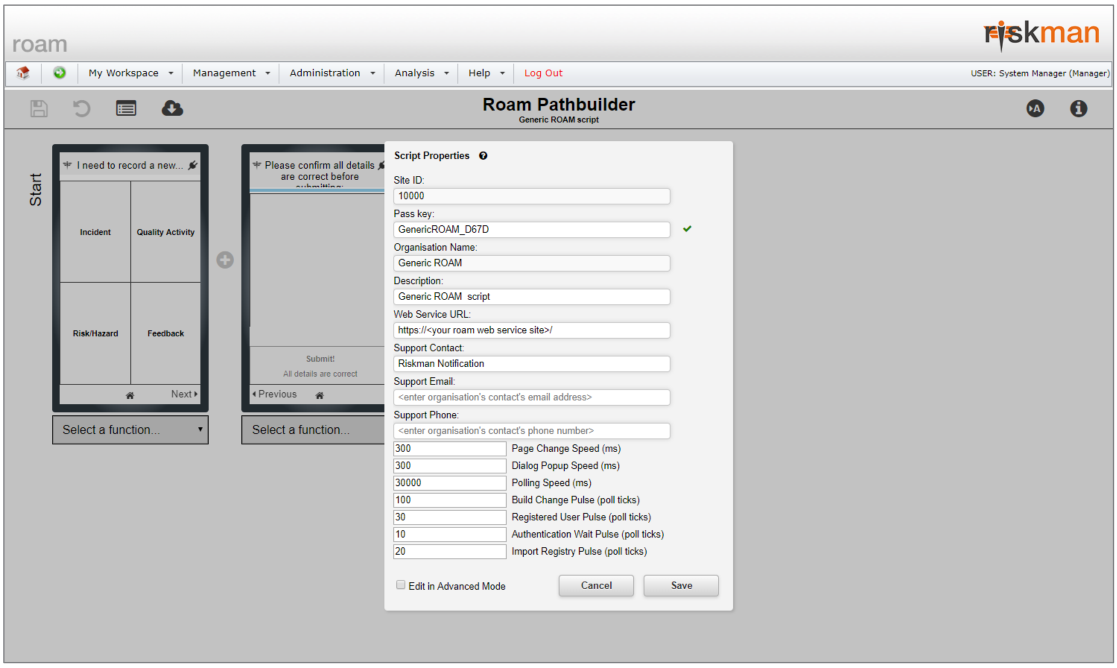
We're now going to look at creating a basic path to introduce you to the interface and basic functionality. Remember, we strongly recommend you only start using the Script Builder tool once you have identified all the fields that you want users to complete!

We're going to create a script, containing a path, which will allow users to capture **incidents**.

After reviewing the fields on the incident entry form, we've decided that we want the users to capture the following data:

- Reporter's name
- Incident Involved
- First name & Surname
- Site
- Department
- Location of incident
- Incident date, Incident time
- Type of incident
- Summary
- Ability to attach photographs

After clicking Create new script, the screen will appear as follows:


roam
riskman
My Workspace
Management
Administration
Analysis
Help
Log Out
USER: System Manager (Manager)
Roam Pathbuilder
Generic ROAM script
Start
I need to record a new...
Incident
Quality Activity
Risk/Hazard
Feedback
Next
Select a function...
Please confirm all details are correct before submitting:
Submit!
All details are correct
Previous
Select a function...
Cancel
Save

Script Properties

Site ID: 10000

Pass key: GenericROAM_D67D ✓

Organisation Name: Generic ROAM

Description: Generic ROAM script

Web Service URL: https://<your roam web service site>/

Support Contact: Riskman Notification

Support Email: <enter organisation's contact's email address>

Support Phone: <enter organisation's contact's phone number>

300 Page Change Speed (ms)
300 Dialog Popup Speed (ms)
30000 Polling Speed (ms)
100 Build Change Pulse (poll ticks)
30 Registered User Pulse (poll ticks)
10 Authentication Wait Pulse (poll ticks)
20 Import Registry Pulse (poll ticks)

☐ Edit in Advanced Mode

As you can see, the first thing we need to do before we can start creating paths is fill in the relevant **Script Properties**.

Script Properties

All properties are mandatory unless stated otherwise.

Site ID

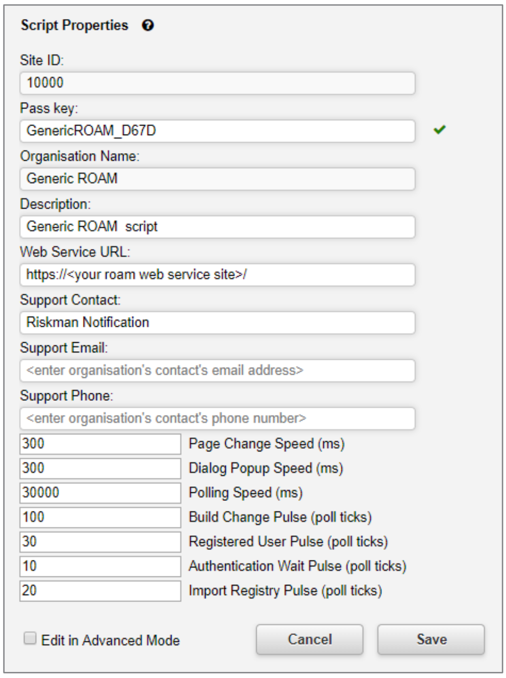
This is automatically populated based on a setting in your system.

Pass key

This is the code that you will need to communicate to your users. A generic passkey is automatically populated, however you can create your own. The passkey is **not** case-sensitive.

Organisation Name

Automatically populated from a Global Setting in your system.



Script Properties

Site ID: 10000

Pass key: GenericROAM_D67D ✓

Organisation Name: Generic ROAM

Description: Generic ROAM script

Web Service URL: https://<your roam web service site>/

Support Contact: Riskman Notification

Support Email: <enter organisation's contact's email address>

Support Phone: <enter organisation's contact's phone number>

300 Page Change Speed (ms)
300 Dialog Popup Speed (ms)
30000 Polling Speed (ms)
100 Build Change Pulse (poll ticks)
30 Registered User Pulse (poll ticks)
10 Authentication Wait Pulse (poll ticks)
20 Import Registry Pulse (poll ticks)

☐ Edit in Advanced Mode

Description

A short description of the purpose of this script. This description is shown on the Script Versions page.

Web Service URL

This is the URL the app needs to connect to in order for your users to transmit their data. This URL should be provided to you by your IT team after they have finished setting up all required modifications on your server.

Support Contact, Email, and Phone

These properties are not yet implemented in the app, but once they are, they will form the basis of what happens when a user asks for help via the app. These details will be displayed so that the user can take action.

Note

The following properties will generally be fine with their default values. It's only likely you will need to change them when advised to by RiskMan.

Page Change Speed

The speed in milliseconds for the ‘page change’ effect (when moving from one screen to the next). The default value of 300ms should be fine in most circumstances. A lower value will make the page change quicker.

Dialog Popup Speed

The speed in milliseconds for a dialog box to animate. The default value of 300ms should be fine in most circumstances. A lower value will make the dialog popup effect appear quicker.

Polling Speed

“Polling” is when the app and RoamConnect will periodically talk to each other to see if a user is connected. The Polling Speed is the speed in milliseconds between checks. A higher value will decrease the server load. The optimal value is around 30000 (30 seconds). A lower value (i.e. more frequent polling) could affect the battery usage of a user’s device. If you get feedback from users saying that Roam is using a high amount of battery, you can consider increasing this value. Please note that the subsequent settings rely on the polling speed, so for example setting polling speed to 60000 (60 seconds) means that the functionality attached to the following settings will take twice as long to execute.

Build Change Pulse (poll ticks)

If you make changes to a script, users will need to update their app. The Build Change Pulse is the setting that tells the app how frequently it should check with RoamConnect to see if the script on the user’s phone is up to date. A higher value will decrease server load. The optimal value is around 1200.

Registered User Pulse (poll ticks)

The app will periodically check with RoamConnect to see if a user is still registered – that is, their RiskMan user profile is active (not deleted or expired). This is an important check to perform, as a user might have left your organisation, however may still have the app, and your script, on their device. The Registered User Pulse is the setting that tells the app how frequently it should check with RoamConnect to verify if a user is registered or not. A higher value will decrease the server load. The optimal value is around 120.

Authentication Wait Pulse (poll ticks)

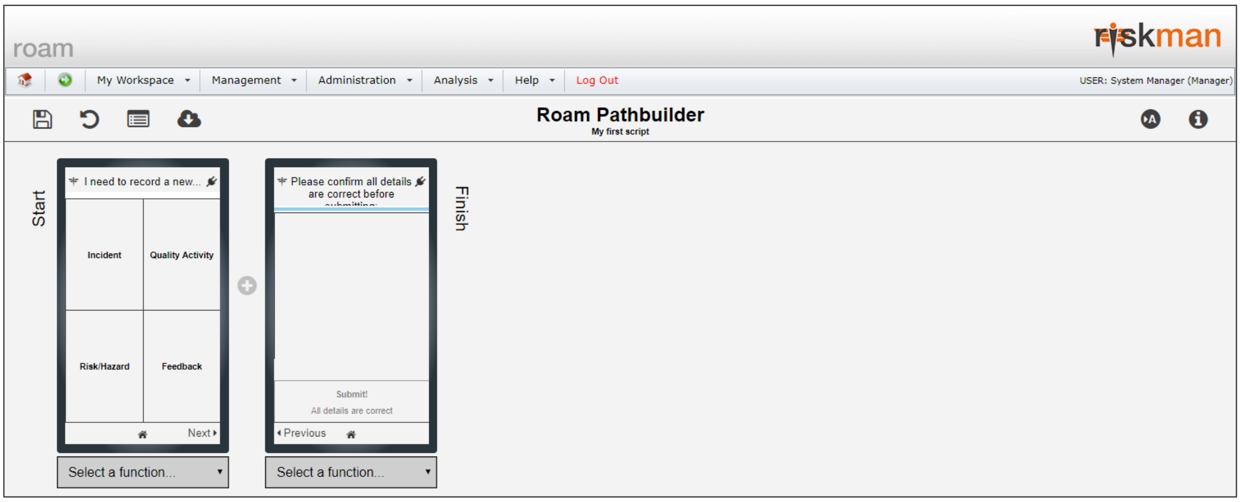
Roam will periodically request the user to authenticate their username and password. When asked to do this, the user can opt to tap “Later” if they didn’t want to do it right then. This setting controls how long it will take to ask the user to authenticate after tapping “Later”.

Import Registry Pulse (poll ticks)

This setting controls how often the app will attempt to transmit new records saved on the device to RoamConnect, so that the data can be added as new records in your RiskMan system. A higher value will decrease the server load. The optimal value is around 600.

Once you have entered all the required script properties, click the **Save** button to start creating a path!

The Path Builder screen


roam
riskman
My Workspace
Management
Administration
Analysis
Help
Log Out
USER: System Manager (Manager)
Roam Pathbuilder
My first script
Start
I need to record a new...
Incident
Quality Activity
Risk/Hazard
Feedback
Next
Please confirm all details are correct before submitting
Submit!
All details are correct
Previous
Finish
Select a function...
Select a function...

This is the Path Builder screen. Like many other parts of RiskMan, you'll notice there is a toolbar up the top, with functionality icons on the left and right hand sides. The most essential ones are:

Save the script

Undo your last action

Return to the **Script Versions** page

Switch to **Advanced** mode (covered later in this guide)

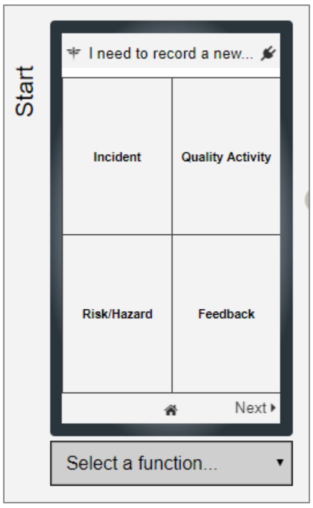
Show some basic **Information** about the script

We'll explain the other icons as they become relevant to what we're doing.

Beneath the toolbar, you can see there are two simulated Roam screens, to give you an idea of what each step in your path will look like. These are the first and last screens in your path – the register selection screen, and the final step, asking the user to confirm that all details are correct before submitting a new record. As you add new steps in your path, you will see more simulated screens representing each step, which will be displayed horizontally.

Under each simulated screen, you can see a drop down box. This contains various functionality to modify each step in some way.

Working with the first step


Start
I need to record a new...
Incident
Quality Activity
Risk/Hazard
Feedback
Next
Select a function...

You may notice a small floating label which asks you to select a register to get started.

Before doing so, notice that in our example there are 4 registers to choose from.

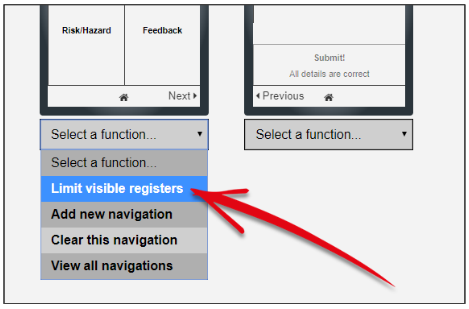
What if you weren't intending to use Roam to record quality activities? Or any of the other registers?

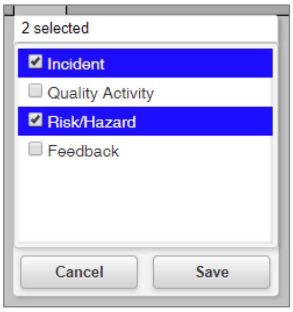
Fortunately, you can remove registers from this screen if you aren't going to use Roam to capture data for them. Let's say we only want to use Roam to record incidents, and risks and hazards.

1.1.1 Removing a register from the Start screen

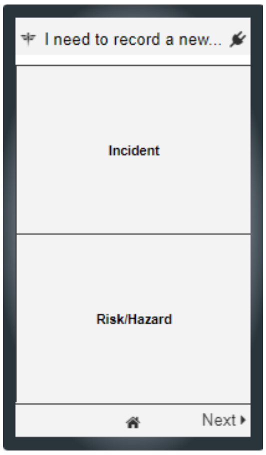
Click the **Select a function…** drop down under the Start screen and select **Limit Visible Registers**.

A small dialog will appear:


Risk/Hazard
Feedback
Next
Submit!
All details are correct
Previous
Select a function...
Select a function...
Select a function...
Limit visible registers
Add new navigation
Clear this navigation
View all navigations

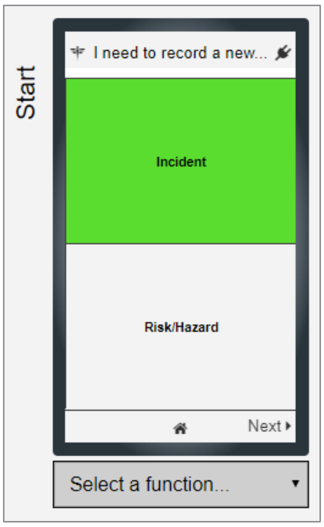

2 selected
☑ Incident
☐ Quality Activity
☑ Risk/Hazard
☐ Feedback
Cancel
Save

Use this multi-select list to specify which registers should be available to users when they use Roam. The result:


I need to record a new...
Incident
Risk/Hazard
Next

It should also be noted that the list of available registers will also be filtered based on a user's individual profile permissions. For example, if you opted to show the quality activity register, but a user didn't actually have permission to that register in RiskMan, then that same rule will be obeyed by Roam and user will not see it.

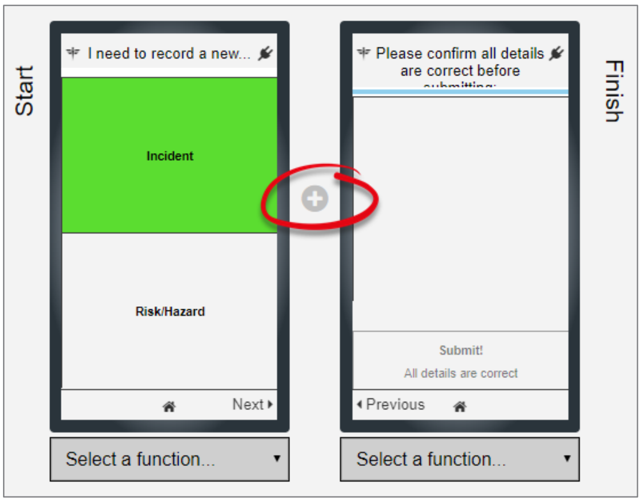
We'll now click on the **Incident** value to start the path for the incident register:


Start
I need to record a new...
Incident
Risk/Hazard
Next
Select a function...

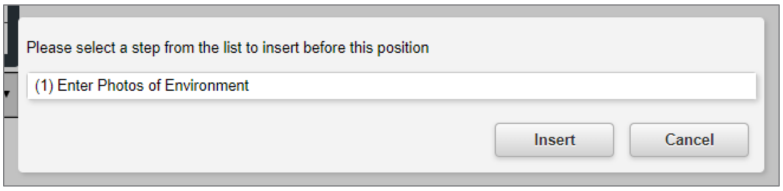
Now that we've selected the incident register, every subsequent step we add to the path will be for the incident register.

1.1.2 Adding the first step to your path

To add a step to your path, click the **plus** icon in between the two screens:


Start
I need to record a new...
Incident
Risk/Hazard
Next
Select a function...
Please confirm all details are correct before submitting:
Submit!
All details are correct
Previous
Select a function...
Finish

This will show you a drop down box with all of the fields that can be added to your path:



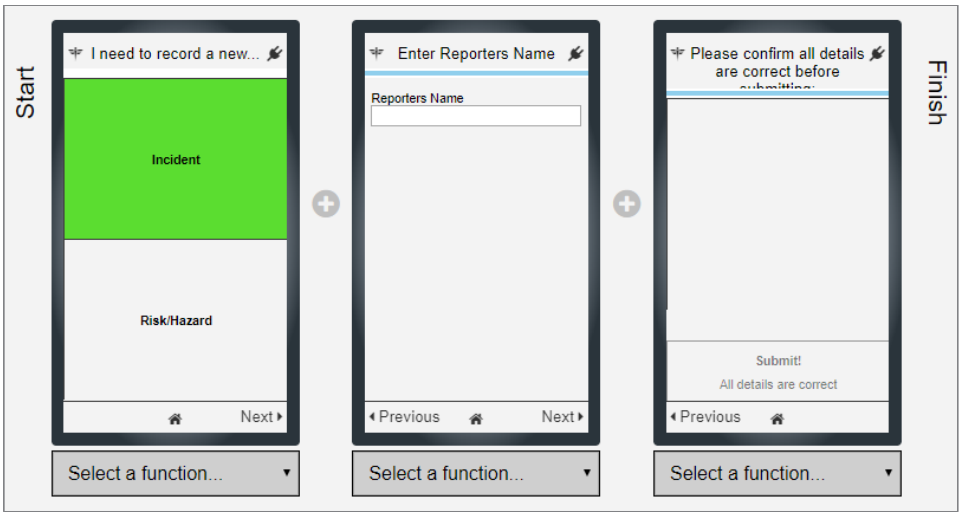
Please select a step from the list to insert before this position

(1) Enter Photos of Environment

Insert
Cancel

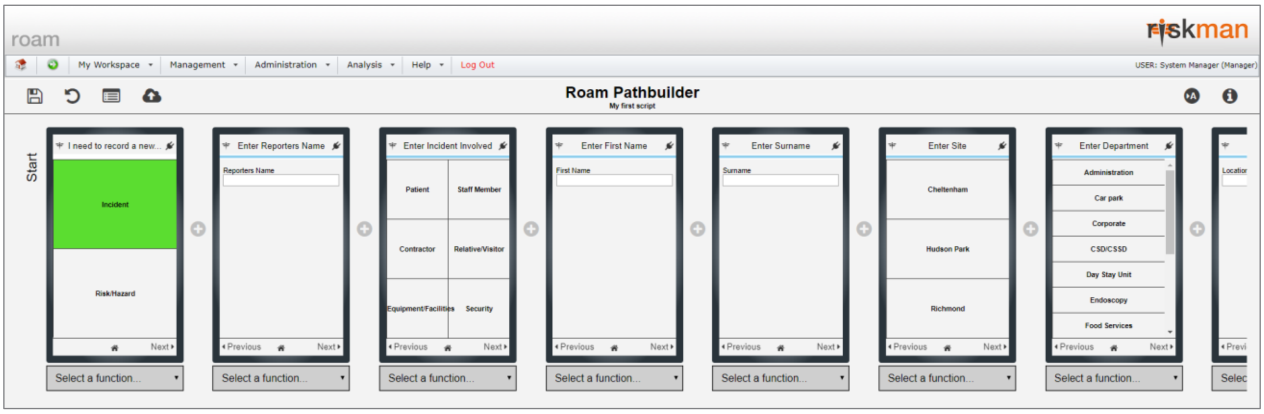
Open the drop down box to find the field you want to add. You can also type the name of a field, and the list will be filtered as you type. Select your desired field and click the **Insert** button.

The first field we'll add in this example will be **Reporter's Name**. Now, the screen looks like this:



Start
I need to record a new...
Incident
Risk/Hazard
Next
Select a function...
Enter Reporters Name
Reporters Name
Previous
Next
Select a function...
Please confirm all details are correct before submitting:
Submit!
All details are correct
Previous
Select a function...
Finish

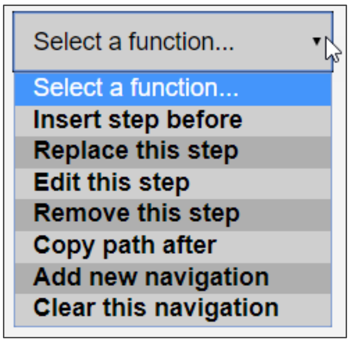
Repeating this to add all the fields we listed on page 9, our complete path looks like this:



roam
riskman
My Workspace
Management
Administration
Analysis
Help
Log Out
USER: System Manager (Manager)
Roam Pathbuilder
My first script
Start
I need to record a new...
Incident
Risk/Hazard
Enter Reporters Name
Reporters Name
Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Enter First Name
First Name
Enter Surname
Surname
Enter Site
Cheltenham
Hudson Park
Richmond
Enter Department
Administration
Car park
Corporate
CSD/CSSD
Day Stay Unit
Endoscopy
Food Services
Location
Previous
Next
Select a function...

We can scroll horizontally to see the entirety of our linear path.

Ways you can modify a step


Select a function...
Select a function...
Insert step before
Replace this step
Edit this step
Remove this step
Copy path after
Add new navigation
Clear this navigation

The following options are available in the drop down box beneath each step:

Insert step before inserts a new step to the left of the selected one.

Replace this step allows you to replace the current step with a new one, without affecting the rest of the path.

Edit this step provides you with a variety of options, depending on the type of field in question. We'll look at examples of this on the next page.

Remove this step removes the current step without affecting the rest of the path.

Copy path after copies the rest of the steps in the path after the selected one, which allows you to paste it in an alternative path.

Add new navigation and **Clear this navigation** will be explained later.

Properties common to every step

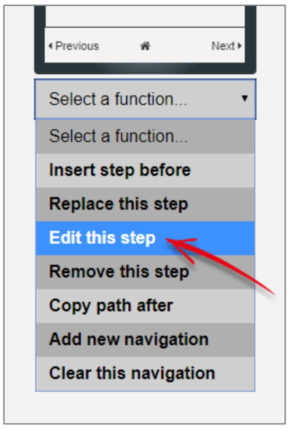
1.1.3 The ID field

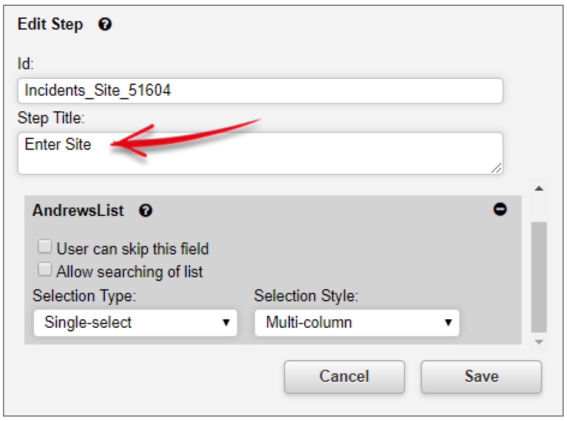
Every step that you add to every path needs to have an individual ID number. As you can see, an ID number is generated by default, which follows the pattern of [Register name]_[Field name]_[Random number]. There generally should be no need to replace this ID value.

1.1.4 Changing the title of a step

The default title for each step in your path is simply “Enter [field name]”. In some cases, you may wish to modify the title, either because it doesn’t make sense, or perhaps to shorten the length of the title.

To edit the title of a step, click its respective dropdown box and select **Edit this step**. We’re going to change the title for our Site step. The **Edit Step** dialog box appears:


Previous
Next
Select a function...
Select a function...
Insert step before
Replace this step
Edit this step
Remove this step
Copy path after
Add new navigation
Clear this navigation


Edit Step

Id: Incidents_Site_51604

Step Title: Enter Site

AndrewsList

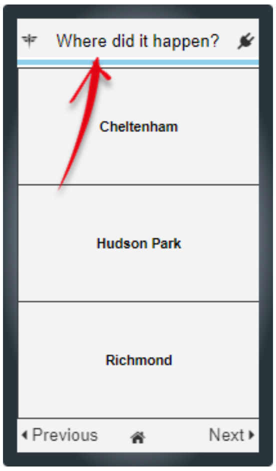
☐ User can skip this field
☐ Allow searching of list

Selection Type: Single-select

Selection Style: Multi-column

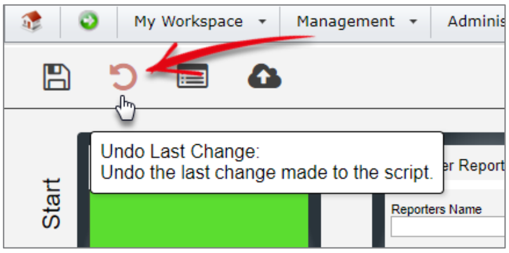
Cancel
Save

In the **Question** field, you can modify the text that appears at the top of a step. We’re going to change the text to read *Where did it happen?* Then click **Save** to see your changes:


Where did it happen?
Cheltenham
Hudson Park
Richmond
Previous
Next

Note

Did you make a mistake? If you do, notice that one of the icons on the left toolbar is an ***undo*** *function. There is no limit to the number of steps that can be undone.*



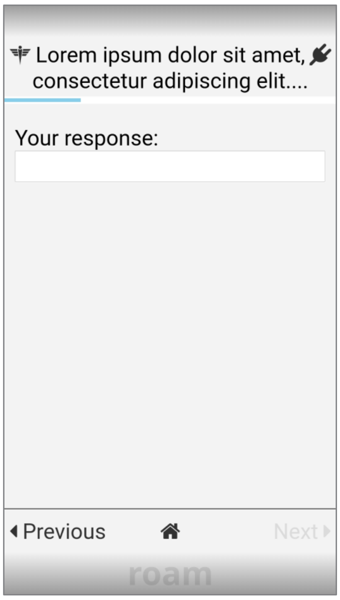
Undo Last Change:
Undo the last change made to the script.

My Workspace
Management
Adminis
Start
r Report
Reporters Name

1.1.5 What happens when the title of a step is very long?

Sometimes it isn't possible to shorten the title of a step; for example, an audit question.

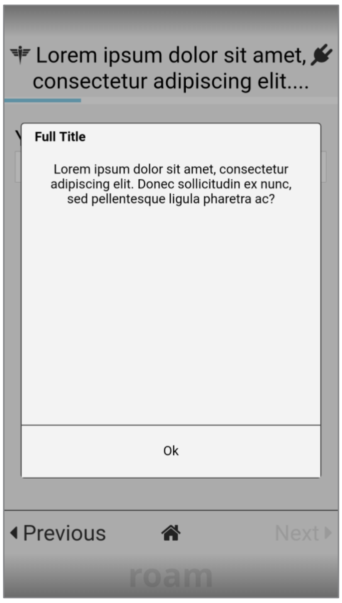
The space for a step title can expand, but only to a certain point. If there are more characters in a step than can be displayed, the remainder of the characters will be truncated:



Lorem ipsum dolor sit amet, consectetur adipiscing elit....

Your response:

The presence of the ellipsis lets you know that there is more text in the title. **Tap** the title itself to see the whole thing:



Lorem ipsum dolor sit amet, consectetur adipiscing elit....

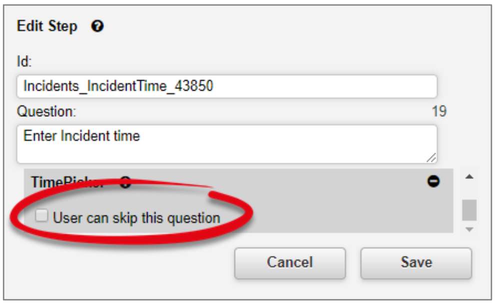
Full Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec sollicitudin ex nunc, sed pellentesque ligula pharetra ac?

There is no practically enforced maximum number of characters for a step title.

1.1.6 Making a step optional

By default, every step that you add to a path is mandatory. If desired, you can make a step optional. To do this, check the box marked **User can skip this question**.



Edit Step

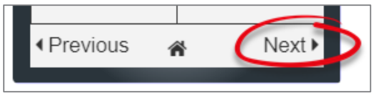
Id: Incidents_IncidentTime_43850

Question: Enter Incident time

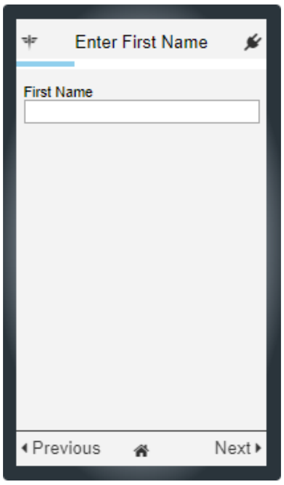
TimePicker

☐ User can skip this question

This will allow the user to tap the **Next** button at the bottom of their screen without having completed the question:

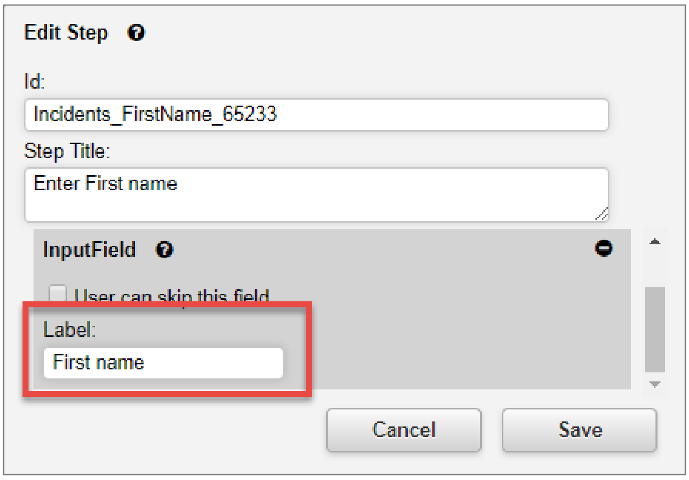


Properties unique to free text fields



1.1.7 Modify the field label

Every step has a title, but when your step contains a free text field, there is also a field label. In the example above, you can see the label reads “First Name”. This text can be modified as shown here:



Edit Step

Id: Incidents_FirstName_65233

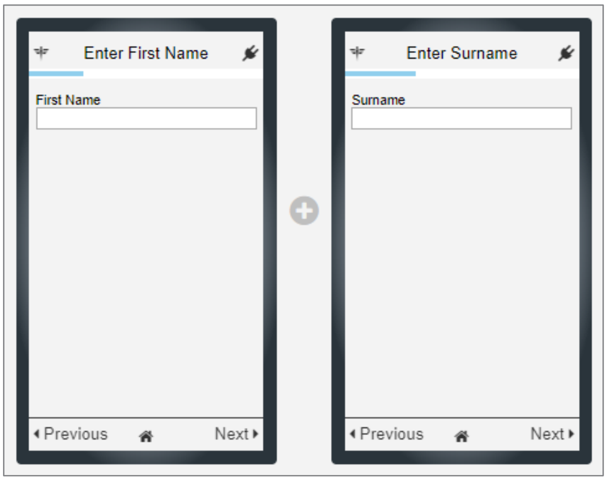
Step Title: Enter First name

InputField

☐ User can skip this field

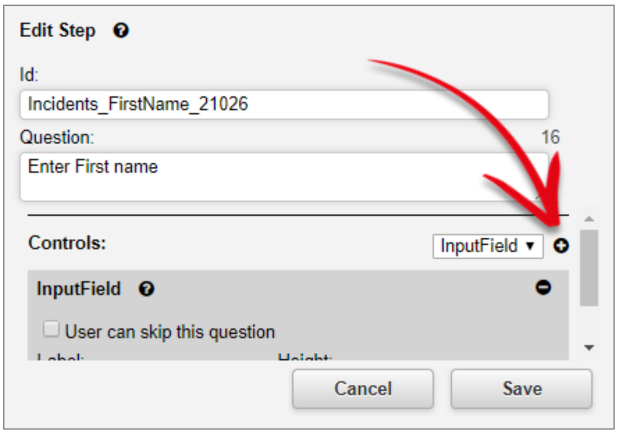
Label: First name

1.1.8 Put multiple text entry fields in the one step


Enter First Name
First Name
Previous
Next
Enter Surname
Surname
Previous
Next

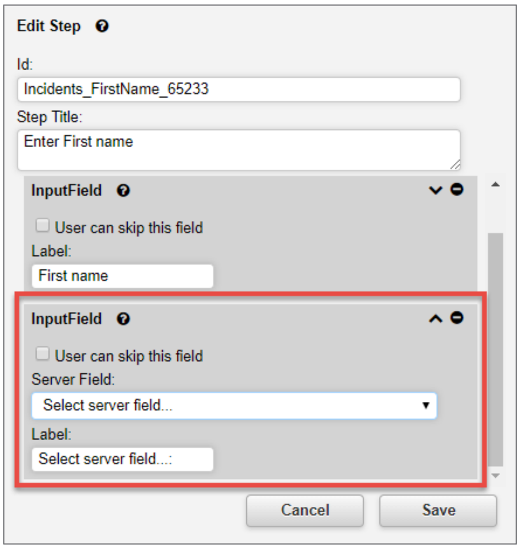
In the current path, we have added two steps – First Name and Surname. Instead of having two steps with single free text fields, you are able to add multiple free text fields to the one step.

To do this, we're going to **edit** the **First Name** step, and click the **(+)** icon indicated:


Edit Step
Cancel
Save

Id:
Incidents_FirstName_21026
Question: 16
Enter First name
Controls: InputField ▾
InputField
☐ User can skip this question

This adds a second dark grey area, where we can specify another free text field that we want included in this step:


Edit Step

Id:
Incidents_FirstName_65233

Step Title:
Enter First name

InputField

☐ User can skip this field

Label:
First name

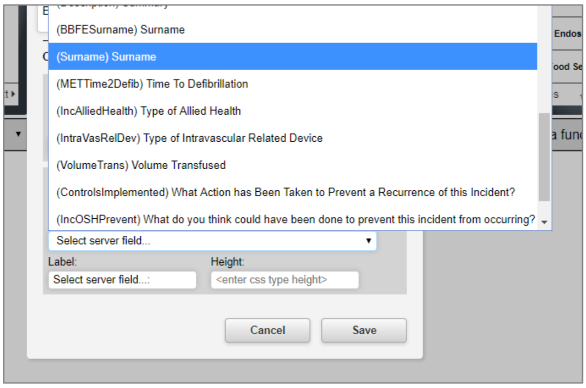
InputField

☐ User can skip this field

Server Field:
Select server field...

Label:
Select server field...:

From the **Server Field** drop down box, we’ll find the correct **Surname** field:

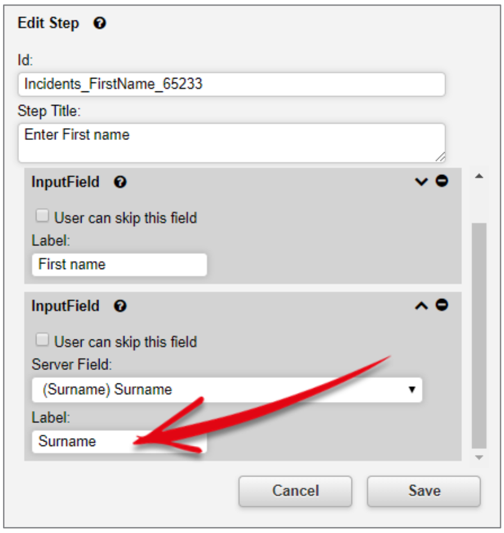

(BBFESurname) Surname
(Surname) Surname
(METTime2Defib) Time To Defibrillation
(IncAlliedHealth) Type of Allied Health
(IntraVasRelDev) Type of Intravascular Related Device
(VolumeTrans) Volume Transfused
(ControlsImplemented) What Action has Been Taken to Prevent a Recurrence of this Incident?
(IncOSHPrevent) What do you think could have been done to prevent this incident from occurring?

Select server field...

Label:
Select server field...:

Height:
<enter css type height>

And, we’ll leave the label as its default of **Surname**:


Edit Step

Id:
Incidents_FirstName_65233

Step Title:
Enter First name

InputField

☐ User can skip this field

Label:
First name

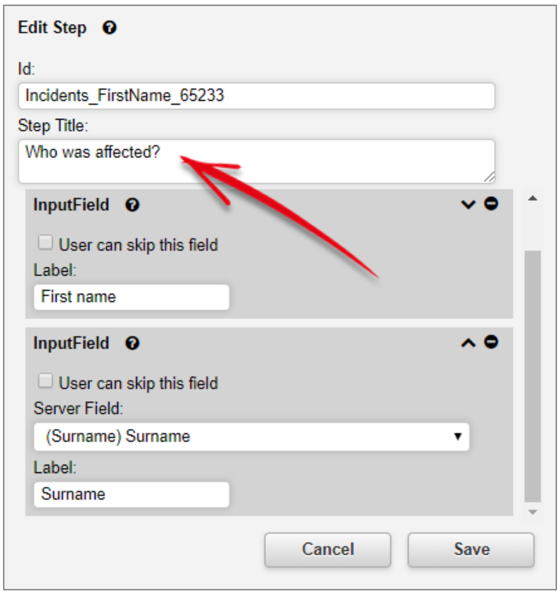
InputField

☐ User can skip this field

Server Field:
(Surname) Surname

Label:
Surname

To make this step complete, we'll modify its **Question** to be something more appropriate:



Edit Step

Id: Incidents_FirstName_65233

Step Title: Who was affected?

InputField

☐ User can skip this field

Label: First name

InputField

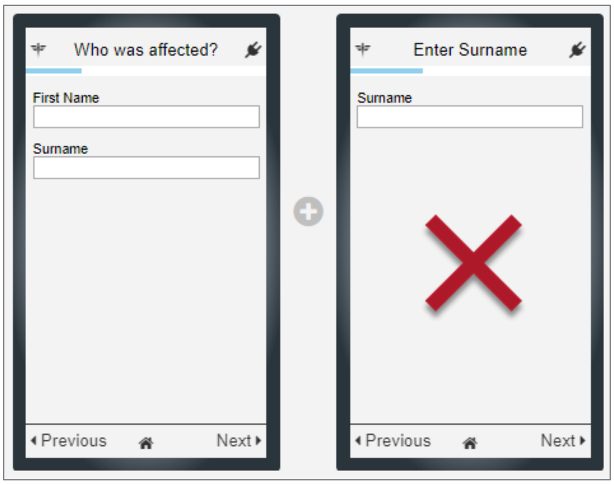
☐ User can skip this field

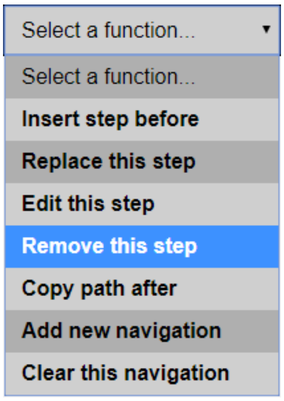
Server Field: (Surname) Surname

Label: Surname

Cancel
Save

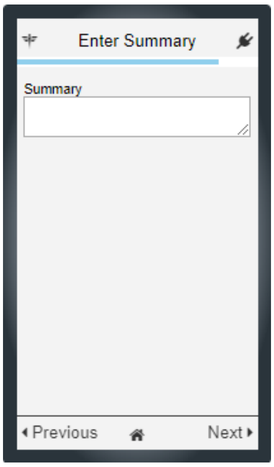
The final result is shown here. Now we can remove the **Surname** step altogether, seeing as it is no longer needed.


Who was affected?
First Name
Surname
Previous
Next
Enter Surname
Surname
Previous
Next

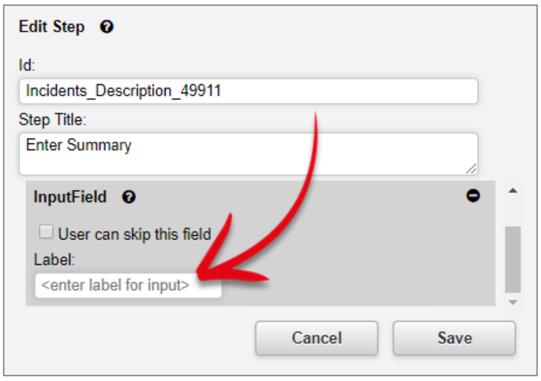

Select a function...
Select a function...
Insert step before
Replace this step
Edit this step
Remove this step
Copy path after
Add new navigation
Clear this navigation

Properties unique to a text area fields

1.1.9 Make the text area take up the entire space on the screen


Enter Summary
Summary
Previous
Next

In the example above, the title of the step is “Enter Summary”, followed by a field label of “Summary” above the actual text input area. This appears to be redundant. If you were to delete the **Field Label** (i.e. Leave it blank), the text area will take up the entire space available.


Edit Step
InputField
Cancel
Save

Id: Incidents_Description_49911

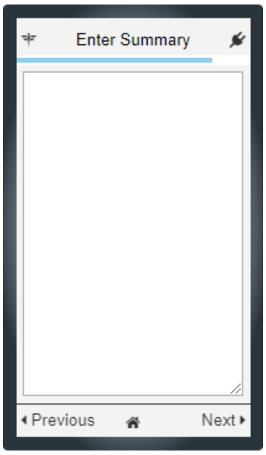
Step Title: Enter Summary

☐ User can skip this field

Label: <enter label for input>

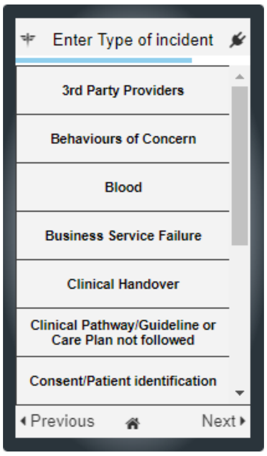
In the above example, we’ve removed the “Summary” text from the label field.

Once we save the step, it looks like this:

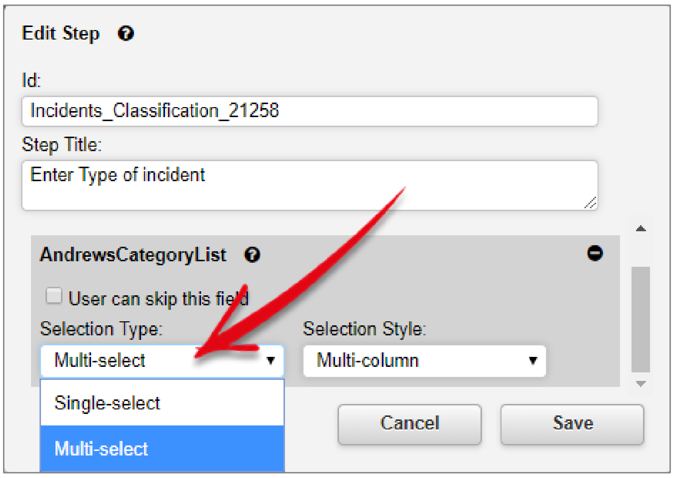

Enter Summary
Previous
Next

Properties unique to list fields

1.1.10 Make a list field single-select or multi-select


Enter Type of incident
3rd Party Providers
Behaviours of Concern
Blood
Business Service Failure
Clinical Handover
Clinical Pathway/Guideline or Care Plan not followed
Consent/Patient identification
Previous
Next

You have the ability to set whether a user can chose only one, or multiple values in list fields. In the **Edit Step** dialog, you will see a drop down list called **Selection Type**:


Edit Step

Id:
Incidents_Classification_21258
Step Title:
Enter Type of incident

AndrewsCategoryList

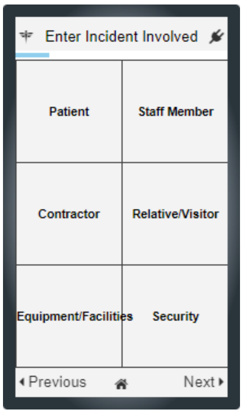
☐ User can skip this field

Selection Type: Multi-select

Selection Style: Multi-column

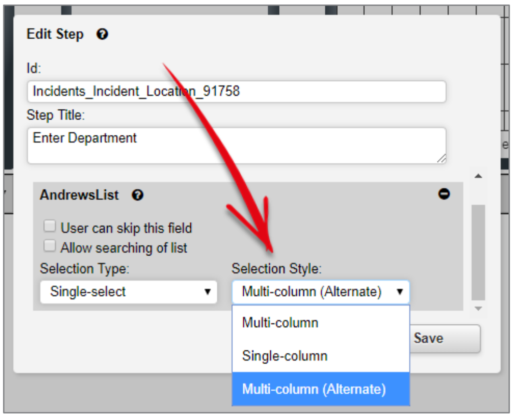
Single-select
Multi-select
Cancel
Save

1.1.11 Change the way the list is presented to the user


Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Previous
Next

As you may have noticed, Roam will change the layout of a list to make the best use of the device's screen, depending on whether the screen is in portrait or landscape orientation.

The default method of showing lists with 4 or more values is to use multiple columns when there is an even number of values in that list, as shown in the example above. Sometimes, depending on the content of the list (in particular the text length of the values in that list), you can opt to force the list to be displayed in a single column at all times. In the Edit this step dialog, you will find a drop down list called **Selection Style**:



Edit Step

Id: Incidents_Incident_Location_91758

Step Title: Enter Department

AndrewsList

☐ User can skip this field

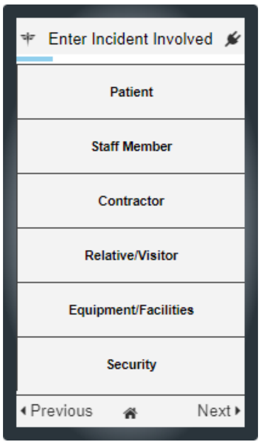
☐ Allow searching of list

Selection Type: Single-select

Selection Style: Multi-column (Alternate)

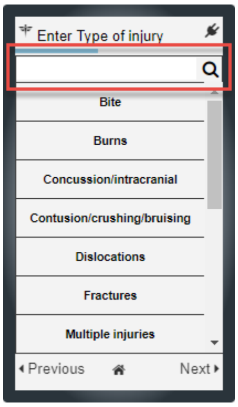
Multi-column
Single-column
Multi-column (Alternate)
Save

The default is **Multi-column**, however if you change it to **Single-column**, the values will appear in one column:


Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Previous
Next

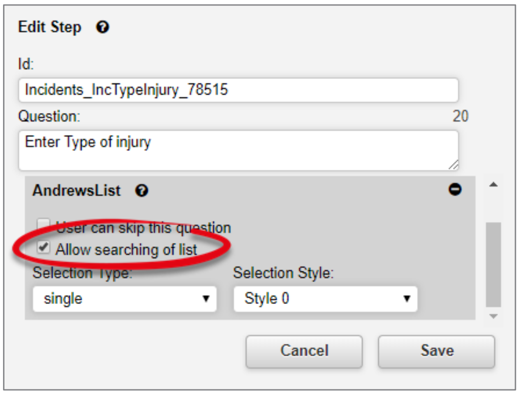
There is also another value, **Multi-column (Alternate)**, which may be suited to use on larger devices like tablets; a bit of experimentation might be in need to see which you prefer.

1.1.12 Add a search box to a list field


Enter Type of injury
Bite
Burns
Concussion/intracranial
Contusion/crushing/bruising
Dislocations
Fractures
Multiple injuries
Previous
Next

Sometimes, a list field that you select might have many values in it. In order to improve the user experience, you can add a search box to a step, so that the user does not need to scroll through a long list of values.

To do this, in the **Edit Step** dialog, check the box labelled **Allow searching of list**:



Edit Step

Id:
Incidents_IncTypeInjury_78515

Question: 20
Enter Type of injury

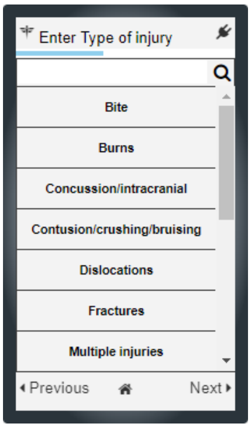
AndrewsList

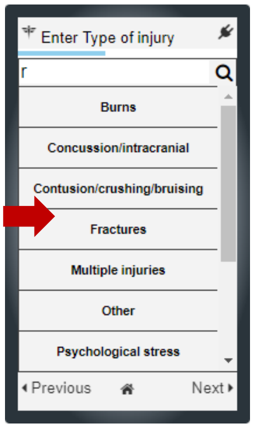
☐ User can skip this question
☑ Allow searching of list

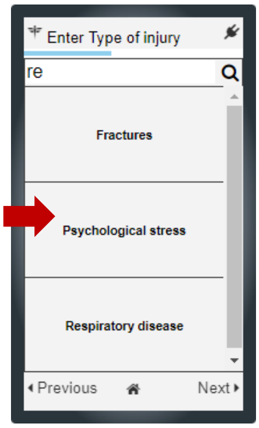
Selection Type: single
Selection Style: Style 0

Cancel
Save

This enables a search box at the top of the step, under the question. The list will be filtered as the user types:


Enter Type of injury
Bite
Burns
Concussion/intracranial
Contusion/crushing/bruising
Dislocations
Fractures
Multiple injuries
Previous
Next

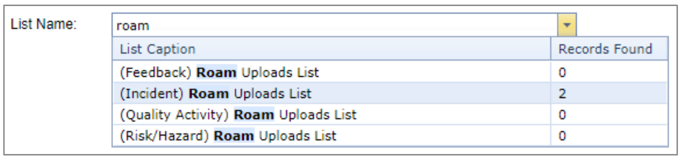

Enter Type of injury
r
Burns
Concussion/intracranial
Contusion/crushing/bruising
Fractures
Multiple injuries
Other
Psychological stress
Previous
Next


Enter Type of injury
re
Fractures
Psychological stress
Respiratory disease
Previous
Next

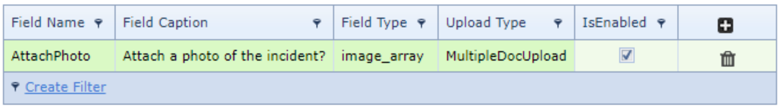
Allowing the user to attach photos to the record

There is a step available to add to a path which allows the user take a photo and attach it, or upload an existing photo from their device. Roam will automatically compress or resize image files which are too large (because mobile devices are capable of taking photos at increasingly high resolutions, meaning very large file sizes). At present it is not possible to take and attach video, however we will be exploring this for a future release.

This feature must be configured in List & Code Maintenance before you can use it in Roam. To do this:

1. Navigate to *Administration* > *List & Codes Maintenance.*
2. Search for **roam** in the search box.
   - 

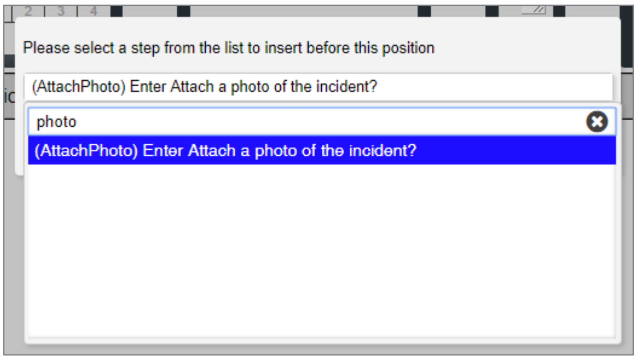
     List Name: roam

List Caption	Records Found
(Feedback) **Roam** Uploads List	0
(Incident) **Roam** Uploads List	2
(Quality Activity) **Roam** Uploads List	0
(Risk/Hazard) **Roam** Uploads List	0
3. Select the register that you want attachments to be enabled for. In our case, we chose the Incident upload list.
4. Click the ⊞ icon in the toolbar to add a new row.
5. There are 5 properties that need to be configured:
   - **Field Name**: You must create a unique name in the database for your attachment step here.
   - **Field Caption**: This is the step title as it will appear in the Roam editor.
   - **Field Type**: There is only one value in this drop down list (image_array). You must select this.
   - **Upload Type**: Here you can determine if the user should be able to attach multiple images, or just one.
   - **IsEnabled**: Makes the step visible in Roam.
   - Our completed entry looks like this:
   - 

Field Name	Field Caption	Field Type	Upload Type	IsEnabled
AttachPhoto	Attach a photo of the incident?	image_array	MultipleDocUpload	☑

     Create Filter
6. Click the ✔ icon in the toolbar to save your changes.

You will now be able to add this as a step in Roam. To do so, click the ⊕ icon as you usually would. Search for the caption you set in step 5 and your entry will appear:



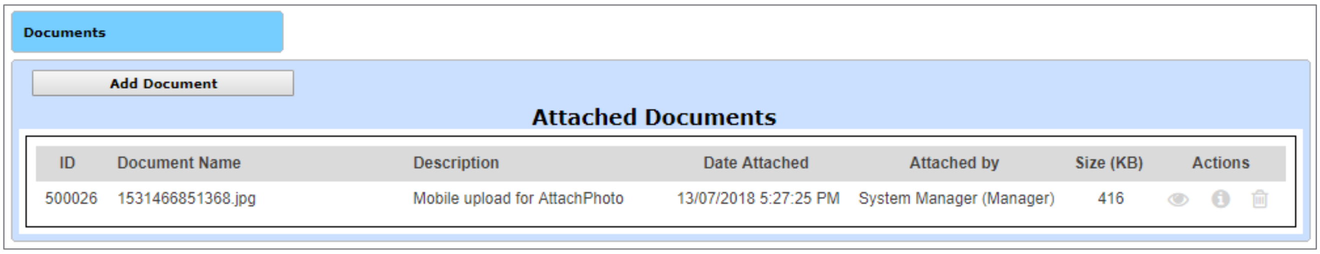
Please select a step from the list to insert before this position

(AttachPhoto) Enter Attach a photo of the incident?

photo

(AttachPhoto) Enter Attach a photo of the incident?

You can then modify the step properties as with any other step. Image attachments will appear in the **Documents** section of the form when you view the record on a computer:



Attached Documents

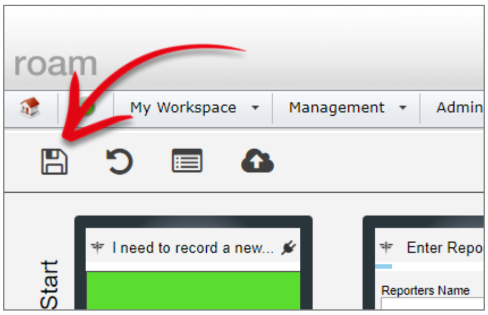
ID	Document Name	Description	Date Attached	Attached by	Size (KB)	Actions
500026	1531466851368.jpg	Mobile upload for AttachPhoto	13/07/2018 5:27:25 PM	System Manager (Manager)	416	

ONCE YOU HAVE FINISHED CREATING PATHS

Once you have finished creating all of the various paths you want, follow these steps to get the script on to your device.

Save the script

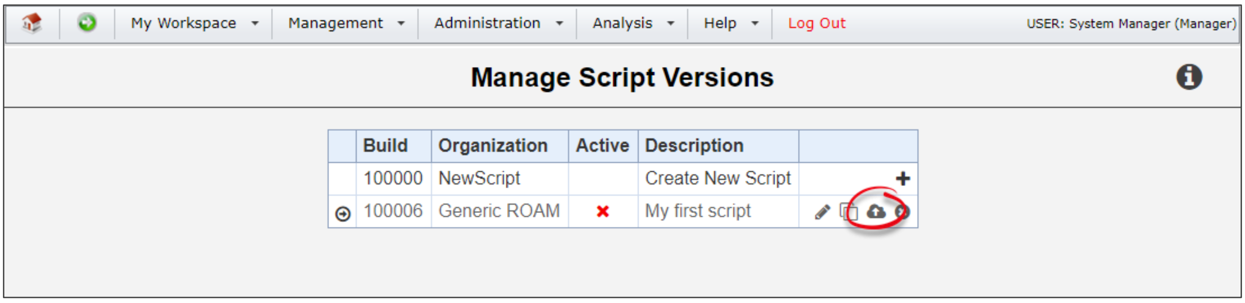
Click the 🖫 icon in the toolbar to save your script. You will then be taken back to the **Manage Script Versions** page.


roam
My Workspace
Management
Admin
Start
I need to record a new...
Enter Repo
Reporters Name

Publish your script

Publishing your script means it will be available to users to download to their devices.

To do so, click the ☁ icon in the toolbar.


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

Manage Script Versions

Build	Organization	Active	Description	
100000	NewScript		Create New Script	+
100006	Generic ROAM	✗	My first script	

(If you need to remove the script for any reason, just click its ☁ icon to **unpublish** it.)

Test your script

It is a good idea to test your script prior to informing users that it is available to download. If possible, perhaps even create a script on your test or training environment for this purpose.

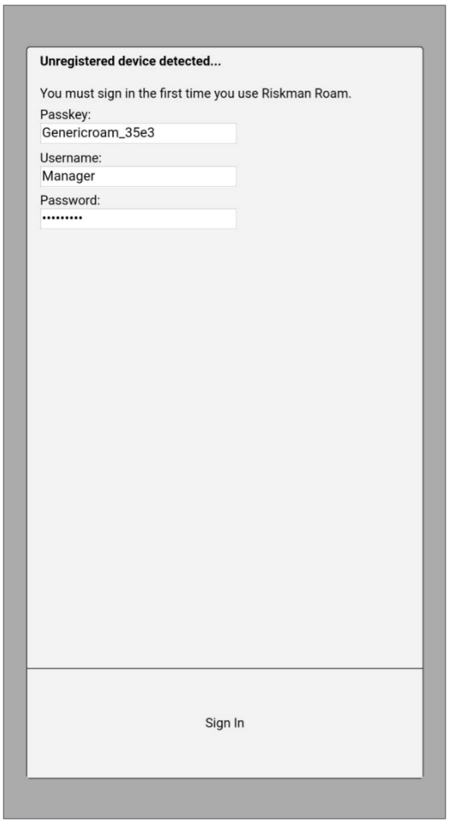
1.1.13 Download the script to your device

The first time you open the Roam app, you will be prompted to enter your credentials. After entering your credentials, tap **Sign In**.

Roam will attempt to authenticate your credentials; when this is successfully completed, Roam will download your script.

There are many variables which will affect how quickly the script takes to be downloaded to your device.

Generally it will be quite fast (2 or 3 seconds), however it wouldn't be unusual for it to take 10 seconds or so.



Unregistered device detected...

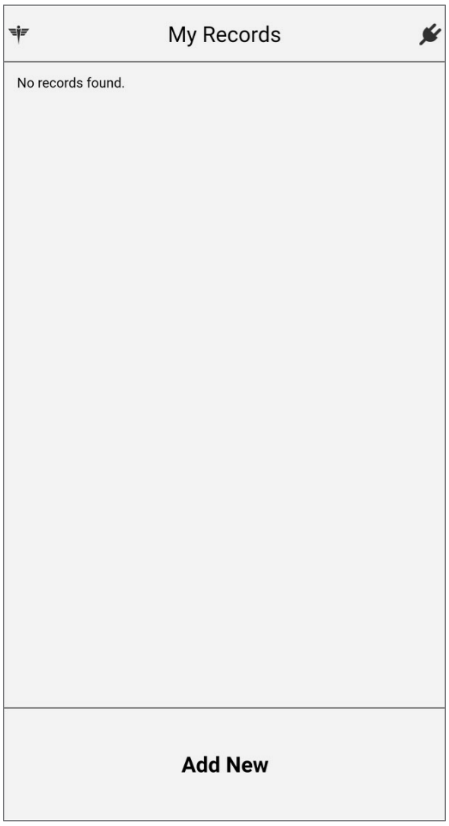
You must sign in the first time you use Riskman Roam.

Passkey: Genericroam_35e3

Username: Manager

Password: ••••••••••

1.1.14 Enter a new record



No records found.

Once the script has been successfully downloaded to your device, you will land on the **My Records** screen.

This contains a list of records you have created using Roam, which is of course empty at this point.

Tap **Add New** to try out your new script!

We recommend entering several new records, testing all of the different fields in the path you created, ensuring everything behaves as you would expect.

If possible, test your script on different devices.

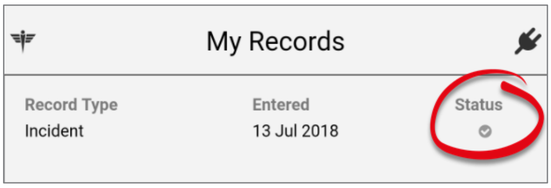
As you use the app with your script, you might realise that you want to do things such as change the way certain lists are displayed, change the order of the steps to flow more logically, or remove unwanted steps altogether.

When you submit your first record, you will land back on the My Records screen.

You'll notice your record is listed now, and there is also a column in the list named **Status**.

This column contains a colour-coded tick icon, and lets you know when your record has successfully been transmitted to your actual RiskMan system.

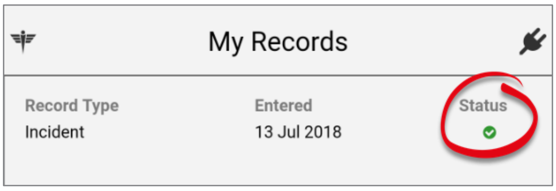
If the tick is grey, the record has not yet been transmitted to your RiskMan system.



My Records

Record Type	Entered	Status
Incident	13 Jul 2018	✓

The tick will turn green to indicate that the record has been transmitted to your RiskMan system.



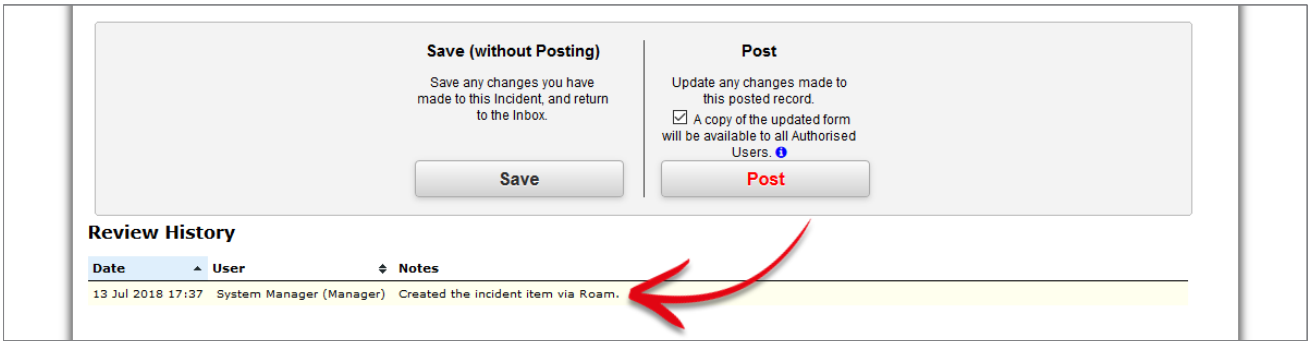
My Records

Record Type	Entered	Status
Incident	13 Jul 2018	✓

1.1.15 Review the transmitted record(s) in RiskMan

Log in to your RiskMan system to review the data you recorded via Roam.

Notice that in the **Review History** of the record, the first entry states that it was originally submitted via Roam:



Save (without Posting)

Save any changes you have made to this Incident, and return to the Inbox.

Post

Update any changes made to this posted record.

☑ A copy of the updated form will be available to all Authorised Users.

Review History

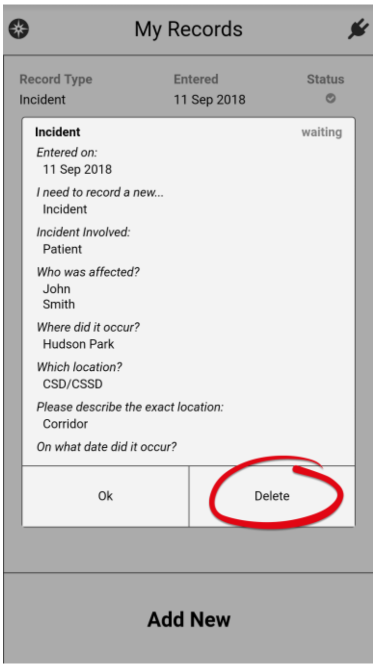
Date	User	Notes
13 Jul 2018 17:37	System Manager (Manager)	Created the incident item via Roam.

1.1.16 Deleting a record from the app

If you tap a record in your My Records list, you can view (but not edit) its contents. There is also a delete button.

If you delete a record from the app which has already been transmitted to your RiskMan system, **the record in your RiskMan system will not be affected**.

If you delete a record from the app which has not yet been transmitted, **it is permanently lost**.



Record Type	Entered	Status
Incident	11 Sep 2018	

Incident waiting

Entered on:
11 Sep 2018

I need to record a new...
Incident

Incident Involved:
Patient

Who was affected?
John
Smith

Where did it occur?
Hudson Park

Which location?
CSD/CSSD

Please describe the exact location:
Corridor

On what date did it occur?

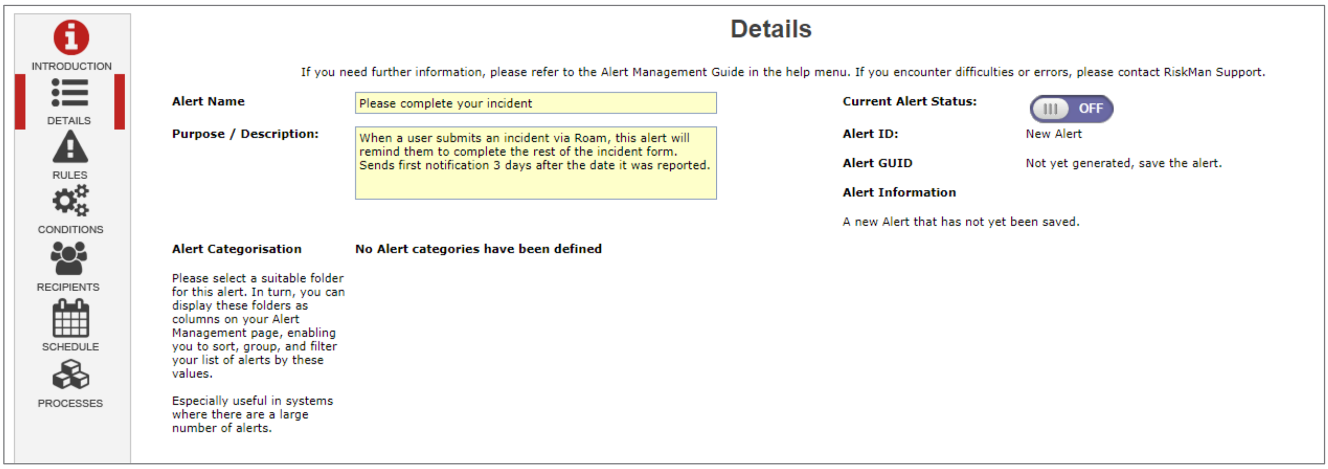
Prompting users to complete a record after submitting via Roam

Remember that in our example script, we ended up with 11 steps in our path. However, in reality, a default user would need to complete several more mandatory fields than this if they submitted an incident by using RiskMan on a computer (In other cases, all relevant fields might be completed via the app, eg. an audit).

If this is the situation you find yourself in, we would recommend configuring an alert which prompts the original reporter to log in to RiskMan via computer and complete the remaining mandatory fields on the form.

Let's take a look at how the alert setup would be done over the next few pages (Any setting that is not explicitly mentioned can be assumed to be left at its default setting).

1.1.17 Alert Details



Details

If you need further information, please refer to the Alert Management Guide in the help menu. If you encounter difficulties or errors, please contact RiskMan Support.

Alert Name Please complete your incident

Purpose / Description: When a user submits an incident via Roam, this alert will remind them to complete the rest of the incident form. Sends first notification 3 days after the date it was reported.

Current Alert Status: OFF

Alert ID: New Alert

Alert GUID Not yet generated, save the alert.

Alert Information

A new Alert that has not yet been saved.

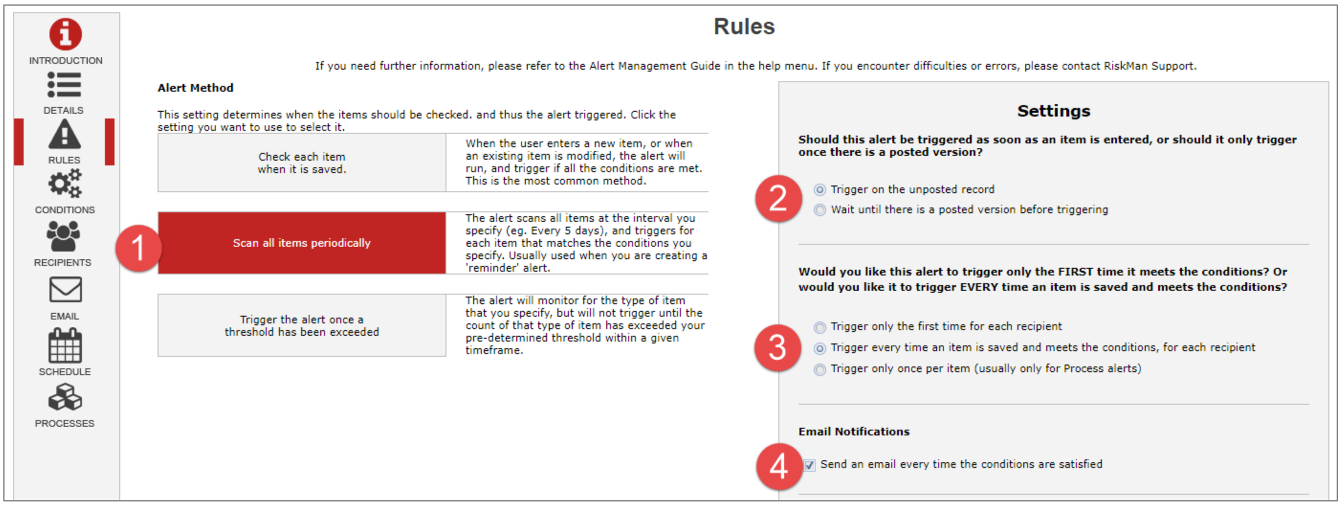
Alert Categorisation **No Alert categories have been defined**

Please select a suitable folder for this alert. In turn, you can display these folders as columns on your Alert Management page, enabling you to sort, group, and filter your list of alerts by these values.

Especially useful in systems where there are a large number of alerts.

As always, enter a meaningful name and description for the alert so that other administrators know exactly what the alert is designed to do.

1.1.18 Alert Rules



Rules

If you need further information, please refer to the Alert Management Guide in the help menu. If you encounter difficulties or errors, please contact RiskMan Support.

Alert Method

This setting determines when the items should be checked. and thus the alert triggered. Click the setting you want to use to select it.

Check each item when it is saved.	When the user enters a new item, or when an existing item is modified, the alert will run, and trigger if all the conditions are met. This is the most common method.
Scan all items periodically	The alert scans all items at the interval you specify (eg. Every 5 days), and triggers for each item that matches the conditions you specify. Usually used when you are creating a 'reminder' alert.
Trigger the alert once a threshold has been exceeded	The alert will monitor for the type of item that you specify, but will not trigger until the count of that type of item has exceeded your pre-determined threshold within a given timeframe.

Settings

Should this alert be triggered as soon as an item is entered, or should it only trigger once there is a posted version?

● Trigger on the unposted record
○ Wait until there is a posted version before triggering

Would you like this alert to trigger only the FIRST time it meets the conditions? Or would you like it to trigger EVERY time an item is saved and meets the conditions?

○ Trigger only the first time for each recipient
● Trigger every time an item is saved and meets the conditions, for each recipient
○ Trigger only once per item (usually only for Process alerts)

Email Notifications

☑ Send an email every time the conditions are satisfied

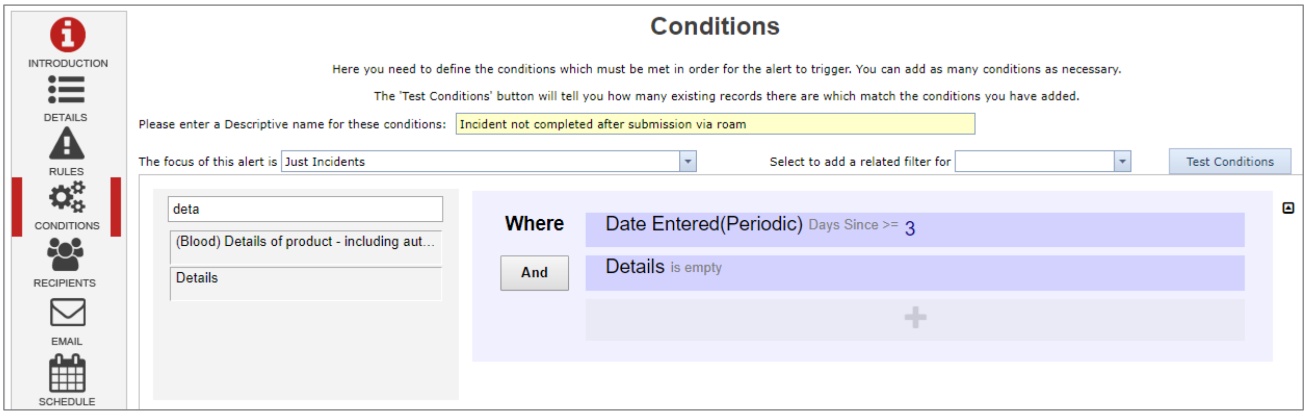
❶ The Alert Method needs to be set to **Scan all items periodically**.

❷ If the target register uses posting, we recommend setting the alert to **Trigger on the unposted record**.

❸ Because we want the user to be reminded more than once to complete the record, we will set the alert to **Trigger every time an item is saved and meets the conditions, for each recipient**.

❹ We definitely want to **Send an email**!

1.1.19 Alert Conditions



Conditions

Here you need to define the conditions which must be met in order for the alert to trigger. You can add as many conditions as necessary.

The 'Test Conditions' button will tell you how many existing records there are which match the conditions you have added.

Please enter a Descriptive name for these conditions: Incident not completed after submission via roam

The focus of this alert is Just Incidents

Select to add a related filter for

deta

(Blood) Details of product - including aut...

Details

Where Date Entered(Periodic) Days Since >= 3

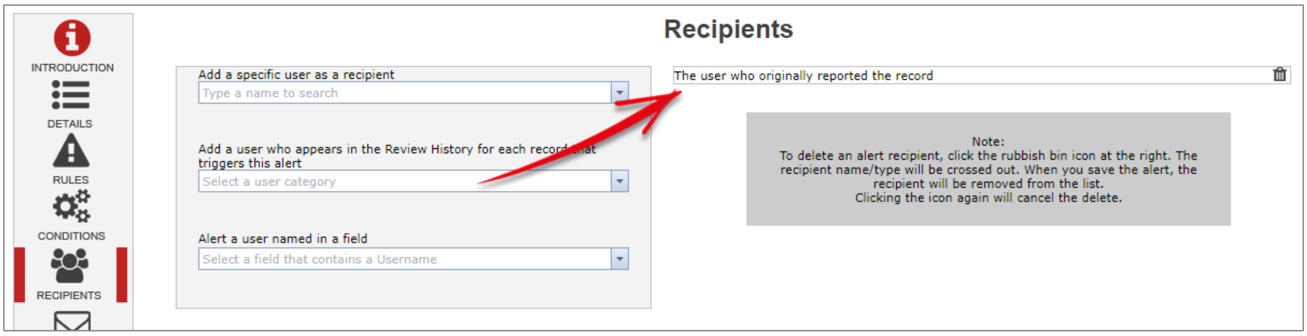
And Details is empty

Here we will state what needs to happen for the alert to trigger.

As with every reminder alert, the first thing we need to define is *when do we want to start reminding the user?* In this case, we have said we want to start reminding the user 3 days after the incident was entered.

As well as that, we need another condition which looks for a field which is mandatory for default users, but was not one of the fields included in the app. If that field is empty, we know the default user has not yet completed the incident.

1.1.20 Alert Recipients



Recipients

Add a specific user as a recipient
Type a name to search

Add a user who appears in the Review History for each record that triggers this alert
Select a user category

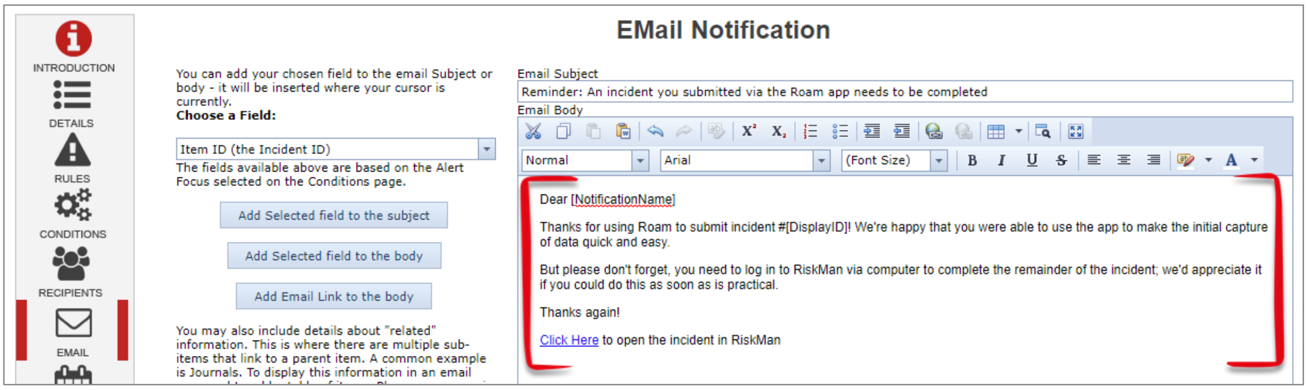
Alert a user named in a field
Select a field that contains a Username

The user who originally reported the record

Note:
To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list.
Clicking the icon again will cancel the delete.

This part is simple; we need to select **The user who originally reported the record** from the field **Add a user who appears in the Review History for each record that triggers this alert**

1.1.21 Alert Email


INTRODUCTION
DETAILS
RULES
CONDITIONS
RECIPIENTS
EMAIL
Add Selected field to the subject
Add Selected field to the body
Add Email Link to the body
Normal
Arial
(Font Size)
B
I
U
S
A

EMail Notification

You can add your chosen field to the email Subject or body - it will be inserted where your cursor is currently.

Choose a Field:

Item ID (the Incident ID)

The fields available above are based on the Alert Focus selected on the Conditions page.

You may also include details about "related" information. This is where there are multiple sub-items that link to a parent item. A common example is Journals. To display this information in an email

Email Subject

Reminder: An incident you submitted via the Roam app needs to be completed

Email Body

Dear [NotificationName]

Thanks for using Roam to submit incident #[DisplayID]! We're happy that you were able to use the app to make the initial capture of data quick and easy.

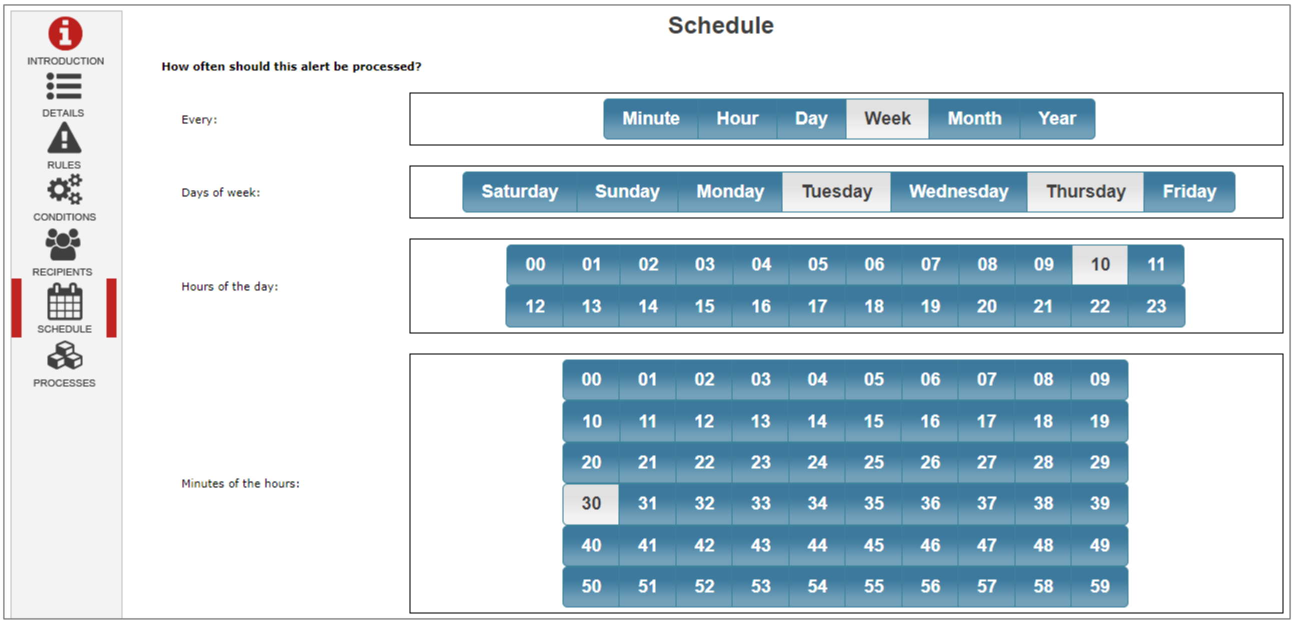
But please don't forget, you need to log in to RiskMan via computer to complete the remainder of the incident; we'd appreciate it if you could do this as soon as is practical.

Thanks again!

Click Here to open the incident in RiskMan

Compose the email you want the users to receive, such as we’ve done in this example.

1.1.22 Alert Schedule


INTRODUCTION
DETAILS
RULES
CONDITIONS
RECIPIENTS
SCHEDULE
PROCESSES
Minute
Hour
Day
Week
Month
Year
Saturday
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
00 01 02 03 04 05 06 07 08 09 10 11
12 13 14 15 16 17 18 19 20 21 22 23
00 01 02 03 04 05 06 07 08 09
10 11 12 13 14 15 16 17 18 19
20 21 22 23 24 25 26 27 28 29
30 31 32 33 34 35 36 37 38 39
40 41 42 43 44 45 46 47 48 49
50 51 52 53 54 55 56 57 58 59

Schedule

How often should this alert be processed?

Every:

Days of week:

Hours of the day:

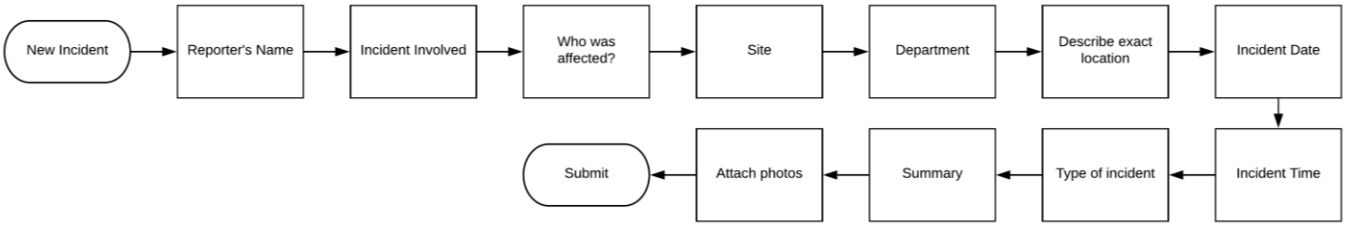
Minutes of the hours:

The final step is to determine how often we want the user to receive a reminder email about an incomplete incident.

In the example above, we’ve set the schedule up so that the user is reminded twice a week (on Tuesdays and Thursdays), and the email should be sent at 10:30am.

NONLINEAR PATHS

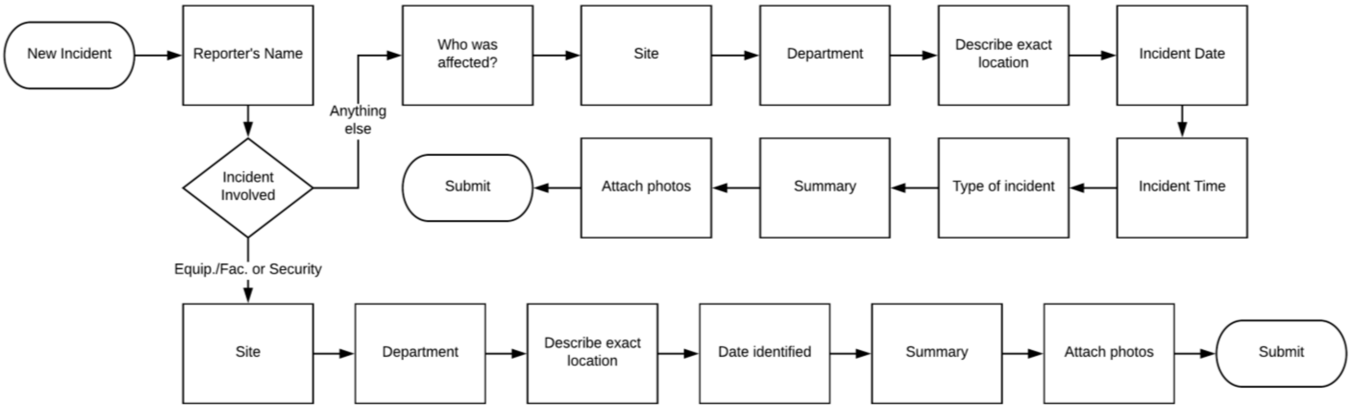
So far, we have kept things simple and just created a linear path – meaning that irrespective of the choices the user makes, they will always see the same fields in the same order.


New Incident
Reporter's Name
Incident Involved
Who was affected?
Site
Department
Describe exact location
Incident Date
Incident Time
Type of incident
Summary
Attach photos
Submit

But what if you wanted the user to collect different information based on different choices they make?

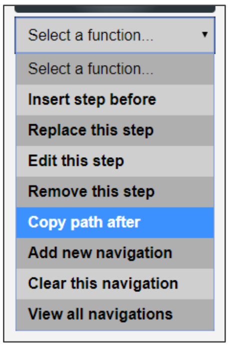
In our script, we ask the user to choose who was affected. In that list, we have two non-person values; Equipment/Facilities and Security. Because we created a fixed path, when the user selects either, they will be asked to choose the name of the person affected, which of course makes no sense. So, in much the same way as your incident form shows and hides various fields depending on the type of person or thing affected, you are able to create alternate paths, based on the values they choose when recording data.

With that in mind, we are going to create multiple paths which collect different information depending on the value selected in Incident Involved:


New Incident
Reporter's Name
Incident Involved
Anything else
Who was affected?
Site
Department
Describe exact location
Incident Date
Incident Time
Type of incident
Summary
Attach photos
Submit
Equip./Fac. or Security
Site
Department
Describe exact location
Date identified
Summary
Attach photos
Submit

As you can see, we'll collect different information when the user is capturing a security or equipment/facilities-related incident.

Copy a path

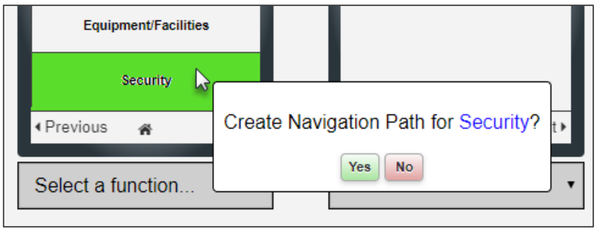

Select a function...
Select a function...
Insert step before
Replace this step
Edit this step
Remove this step
Copy path after
Add new navigation
Clear this navigation
View all navigations

In our current circumstances, where we have two different paths which vary only slightly, one of the quickest ways to achieve our goal is to literally copy and paste the path, and modify the new path as required.

The first step is to determine which step we want to copy from, which in this case, is **Incident Involved**. Click its drop down box and select **Copy path after** (as shown to the right).

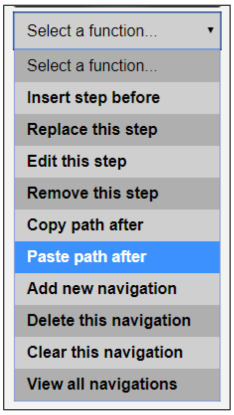
What you have just done is literally copied every step in the path after the Incident Involved step.

Create a new navigation path


Create Navigation Path for Security?
Equipment/Facilities
Security
Previous
Select a function...
Yes
No

The next step is to determine which value(s) will present the user with an alternate path. In our case, we're going to start with Security, and click on it. When you do, you will be asked if you want to create a new navigation for that value:

Paste the path

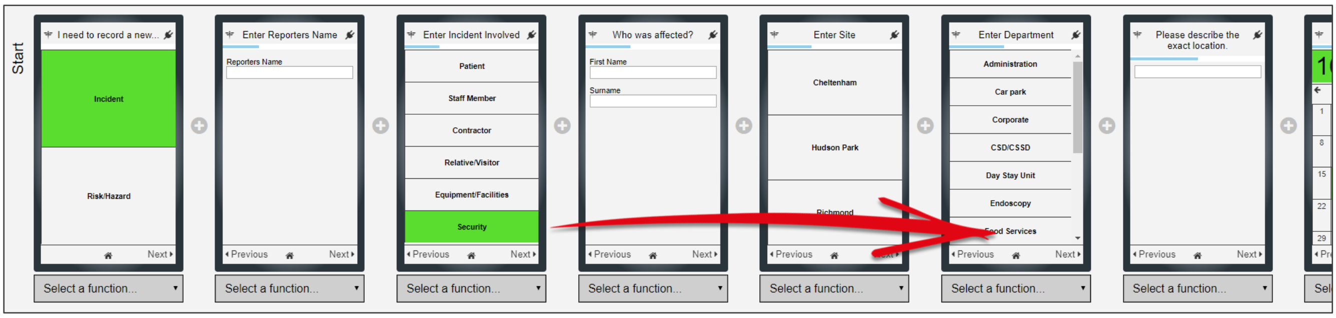

Select a function...
Select a function...
Insert step before
Replace this step
Edit this step
Remove this step
Copy path after
Paste path after
Add new navigation
Delete this navigation
Clear this navigation
View all navigations

After clicking **Yes**, you will see all of the subsequent steps are removed, and only the Submit screen will follow.

Now you are free to go and add the fields you want the user to see when they tap **Security**, but in our case, we've copied the path, so let's paste it.

Click on the drop down box for Incident Involved, and select **Paste path after**:

All of the steps you copied before will be inserted after Incident Involved:


Start
I need to record a new...
Incident
Risk/Hazard
Next
Enter Reporters Name
Reporters Name
Previous
Next
Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Who was affected?
First Name
Surname
Enter Site
Cheltenham
Hudson Park
Richmond
Enter Department
Administration
Car park
Corporate
CSD/CSSD
Day Stay Unit
Endoscopy
Food Services
Please describe the exact location.
Select a function...

Now we can go and remove the steps that we don't need when the user is entering a security incident, and also add any steps required for this path.

After defining the fields that should show for a security incident, we can go ahead and use the same copy and paste technique to add the same path when Equipment / Facilities is selected.

The other values for Incident Involved will all follow the original path.

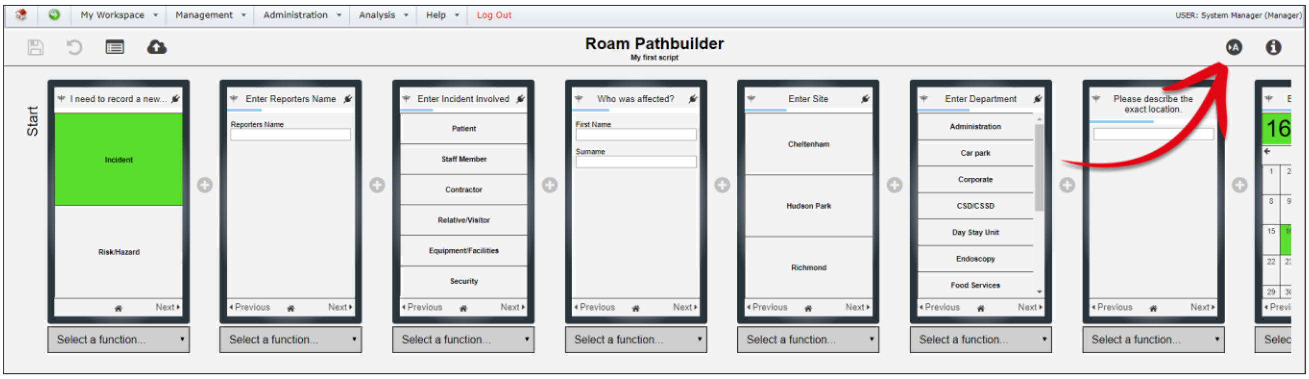
As you can probably tell, this means there are myriad ways you could define different paths depending on the selections the user makes. Because of this, we strongly recommend you define all of this *before* you attempt to build your script.

EDITING A SCRIPT IN ADVANCED MODE

Additional functionality is available when editing your script in advanced mode. However, we do recommend that you switch to advanced mode once you are comfortable editing scripts in basic mode, and you determine that you need to use some of the advanced functionality we're about to describe.

Switching between Basic and Advanced modes

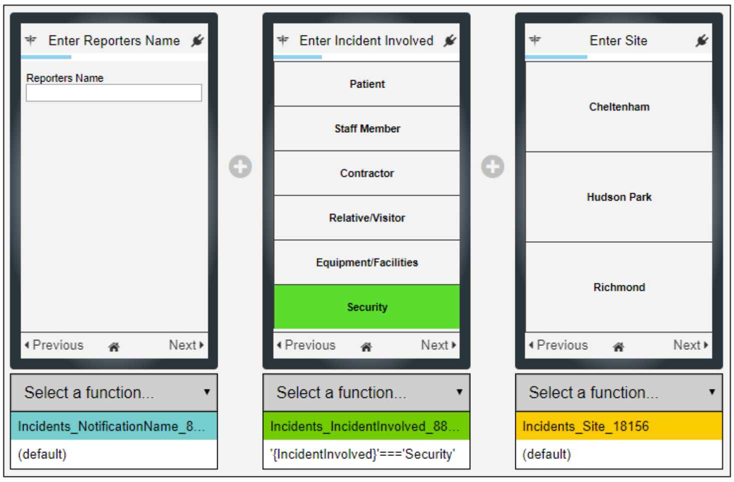
To switch to advanced mode, click the Ⓐ icon on the toolbar:


My Workspace
Management
Administration
Analysis
Help
Log Out
USER: System Manager (Manager)
Roam Pathbuilder
My first script
Start
I need to record a new...
Incident
Risk/Hazard
Next
Enter Reporters Name
Reporters Name
Previous
Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Who was affected?
First Name
Surname
Enter Site
Cheltenham
Hudson Park
Richmond
Enter Department
Administration
Car park
Corporate
CSD/CSSD
Day Stay Unit
Endoscopy
Food Services
Please describe the exact location.
Select a function...

That icon now changes to this one: Ⓑ Click the icon again when you want to return to basic mode.

The Path Builder screen in Advanced Mode

The first and most obvious difference you will see when in advanced mode is the present of more information under each step in your path. This information shows the step ID, and denotes if nothing is selected, or if a value is selected:


Enter Reporters Name
Reporters Name
Previous
Next
Enter Incident Involved
Patient
Staff Member
Contractor
Relative/Visitor
Equipment/Facilities
Security
Previous
Next
Enter Site
Cheltenham
Hudson Park
Richmond
Previous
Next
Select a function...
Select a function...
Select a function...

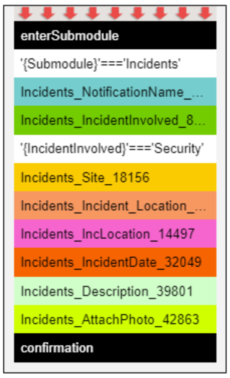
Incidents_NotificationName_8...
(default)

Incidents_IncidentInvolved_88...
'{IncidentInvolved}'==='Security'

Incidents_Site_18156
(default)

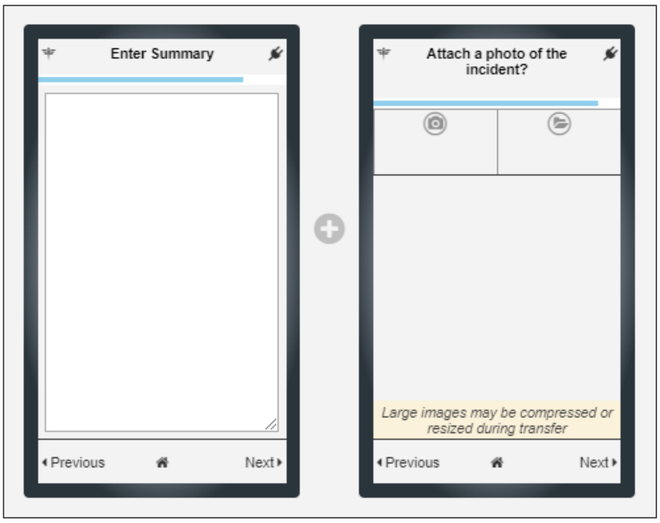
In the example above, in the white space underneath the Reporter’s Name step, you can see the text reads “(default)”.

However, in the Incident Involved step, it states that the currently selected value is Security, and thus the path for Security is being shown after it. This can be useful when used with one of the new icons being displayed in the left toolbar: **Show all paths**.


enterSubmodule
'{Submodule}'==='Incidents'
Incidents_NotificationName_...
Incidents_IncidentInvolved_8...
'{IncidentInvolved}'==='Security'
Incidents_Site_18156
Incidents_Incident_Location_...
Incidents_IncLocation_14497
Incidents_IncidentDate_32049
Incidents_Description_39801
Incidents_AttachPhoto_42863
confirmation

Clicking this icon will show you all of the various paths you have configured based on the step ID. If you hover your mouse over a step ID, the name of the step will be shown as a tooltip.

Creating steps for your path which aren't fields in your RiskMan system

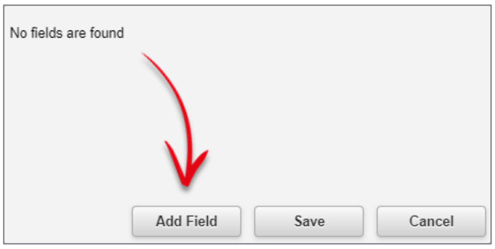

Enter Summary
Previous
Next
Attach a photo of the incident?
Large images may be compressed or resized during transfer
Previous
Next

In advanced mode, you have the ability to add steps to a path which are not fields from your RiskMan system. This allows you added flexibility; you can include more complex navigation choices.

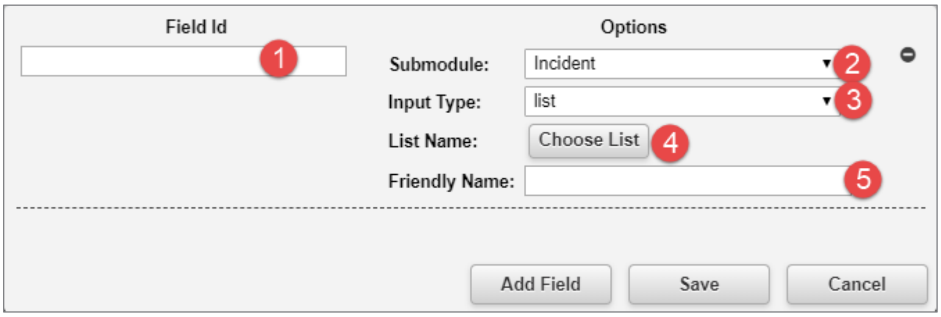
Alternatively, it can help the user make sense of your path. In the example to the right, we go from Summary, straight to attach photos. This could potentially confuse some users – they might think that they *must* attach a photo (even though the step is not mandatory - they could simply tap Next). To remove any ambiguity, we can create a **Flow Field** which asks the user if they want to attach a photo. If yes, next will be the attach photo step. If no, we'll skip the attach photo step.

1.1.23 Create a Flow Field

To create a flow field, click the ⚍ icon on the right side of the tool bar. A dialog will pop up telling you that there are no fields found. Click the **Add Field** button:


No fields are found
Add Field
Save
Cancel

You're then presented with the following dialog:


Field Id
Options
1
Submodule:
2
Input Type:
3
List Name:
Choose List
4
Friendly Name:
5
Add Field
Save
Cancel

Submodule: Incident
Input Type: list

❶ **Field Id** is the unique name for the flow field you're creating. We'll name ours **addaphoto**.

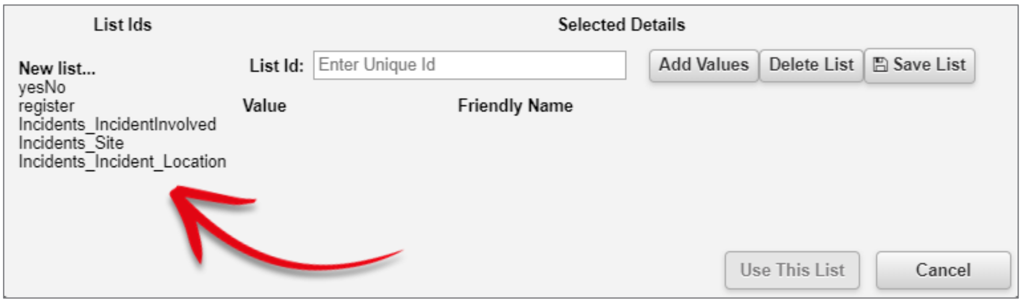
❷ Choose the register you want this flow field to refer to. This is because you are also able to create a flow field that uses the values from an existing field from that register, but we'll look at that concept a little later.

❸ At this stage the only value in the **Input Type** is **list**.

❹ Click **Choose List** to create or configure the content of your flow field. We go into detail on this over the page.

❺ Create a **friendly name** for your flow field. We'll call ours **Do you want to add a photo?** and then we'll click **Add Field**.

1.1.24 Specifying List Values


List Ids
Selected Details
New list...
yesNo
register
Incidents_IncidentInvolved
Incidents_Site
Incidents_Incident_Location
List Id:
Enter Unique Id
Add Values
Delete List
Save List
Value
Friendly Name
Use This List
Cancel

This dialog lets you specify the values that will be in your flow field. Highlighted above are some of the preset and existing list fields could use in your list:

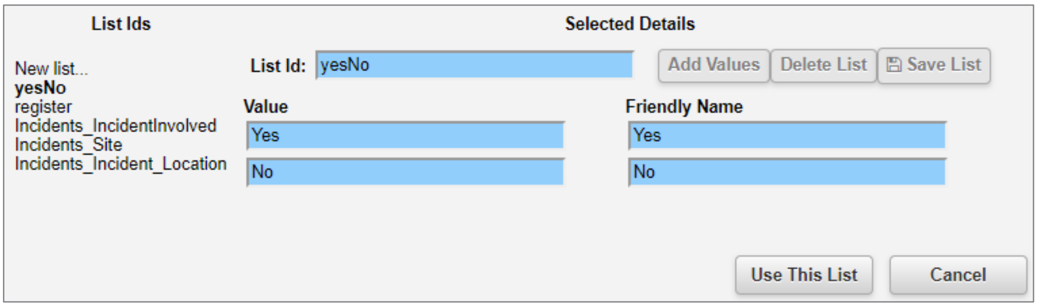
New list… allows you to create your own list, with the values you require.

yesNo: This is your standard Yes / No question.

register: Is the list of registers in your system.

After that are all of the list fields which are already present on your existing path(s).

For the purpose of this example, we'll select **yesNo**, which is a hard-coded list that cannot be modified:



List Ids

New list...
yesNo
register
Incidents_IncidentInvolved
Incidents_Site
Incidents_Incident_Location

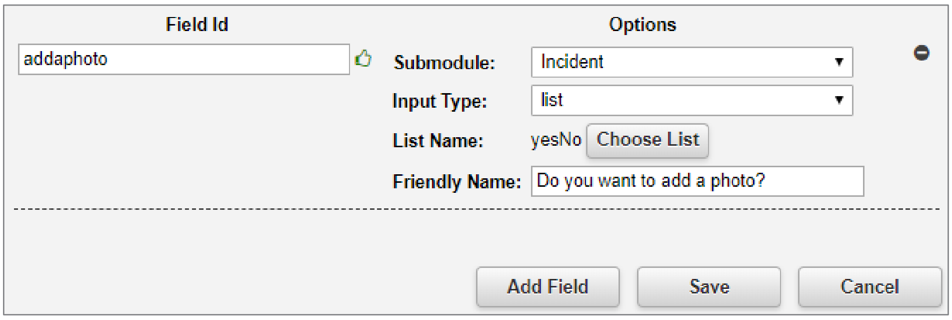
Selected Details

List Id: yesNo

Value	**Friendly Name**
Yes	Yes
No	No

Add Values
Delete List
Save List
Use This List
Cancel

Click **Use This List**, which will take you back to the previous screen:



Field Id: addaphoto

Options

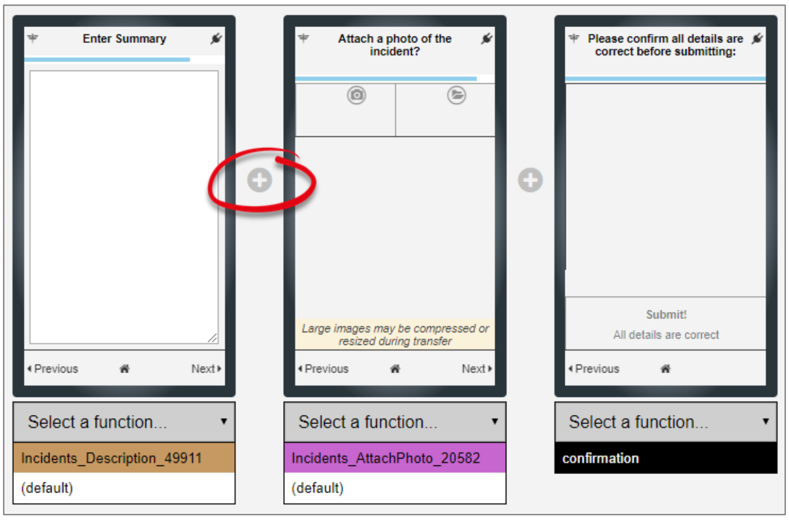
Submodule: Incident
Input Type: list
List Name: yesNo
Friendly Name: Do you want to add a photo?

Choose List
Add Field
Save
Cancel

This dialogue will contain all of the flow fields you create. Click **Save** to finish the process. If you want to create another flow field, click the **Add Field** button. We'll look at more examples of flow fields a little later.

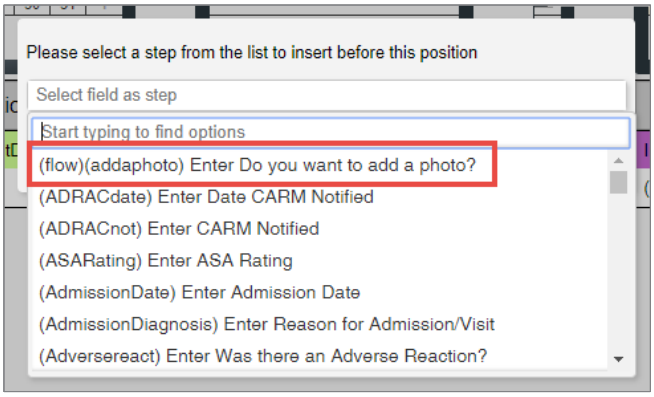
1.1.25 Add the flow field to your path

Now you can add your flow field to the path. Click the (+) icon:


Enter Summary
‹Previous
Next›
Select a function...
Incidents_Description_49911
(default)
Attach a photo of the incident?
‹Previous
Next›
Select a function...
Incidents_AttachPhoto_20582
(default)
Please confirm all details are correct before submitting:
Submit!
All details are correct
‹Previous
Select a function...
confirmation

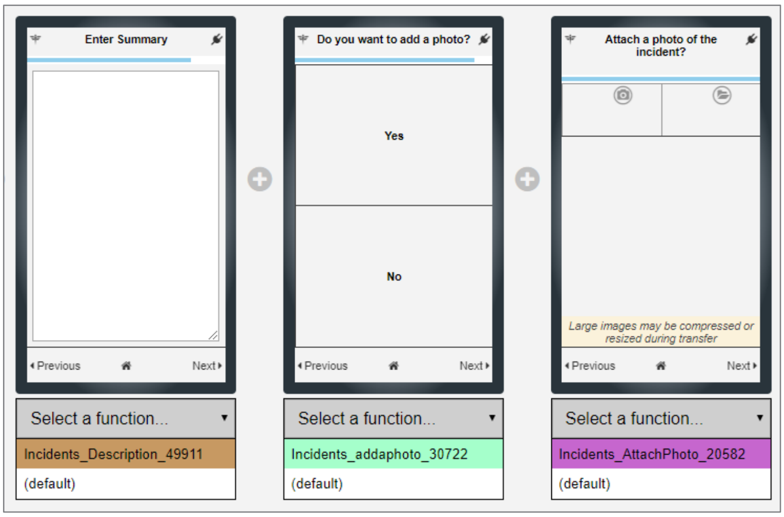
Large images may be compressed or resized during transfer

Your flow field now appears in the list with the rest of the fields from that register:


Please select a step from the list to insert before this position

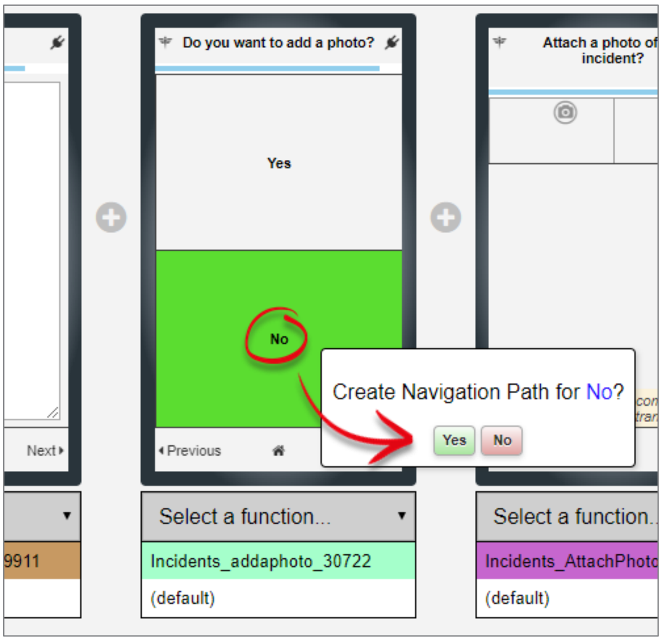
Select field as step
Start typing to find options
(flow)(addaphoto) Enter Do you want to add a photo?
(ADRACdate) Enter Date CARM Notified
(ADRACnot) Enter CARM Notified
(ASARating) Enter ASA Rating
(AdmissionDate) Enter Admission Date
(AdmissionDiagnosis) Enter Reason for Admission/Visit
(Adversereact) Enter Was there an Adverse Reaction?

Add the field to your path:


Enter Summary
‹Previous
Next›
Select a function...
Incidents_Description_49911
(default)
Do you want to add a photo?
Yes
No
‹Previous
Next›
Select a function...
Incidents_addaphoto_30722
(default)
Attach a photo of the incident?
‹Previous
Next›
Select a function...
Incidents_AttachPhoto_20582
(default)

Large images may be compressed or resized during transfer

Remember, the behaviour we want is that the user will see the **Attach Photo** step if they answer **Yes**, and if they answer **No**, they will be taken straight to the **Confirmation** step. Click **No** to start your alternate navigation:


Do you want to add a photo?
Yes
No
Previous
Next
Attach a photo of incident?
Create Navigation Path for No?
Yes
No
Select a function...
Select a function...
9911
Incidents_addaphoto_30722
(default)
Incidents_AttachPhoto
(default)

When you click **Yes**, all steps after this one will be removed – which in this case is just the **Attach Photo** step. That means the **Confirmation** step is left, and that just happens to be what we want as the end of this path.

Switch between **Yes** and **No** to verify that there is a difference. In this scenario, you do not need to create a new navigation path for Yes, as it already does what we want it to do.

Good to know

You can add the same flow field anywhere in your script, multiple times. Such as in this example, you now have a generic yes / no question you can add anywhere to direct the user down a different path; just change the name of the step when you add it.

1.1.26 Creating a flow field using your own custom list values

You can create a flow field that contains any list values you want – just keep in mind that the value the user selects will not be in the saved record in your RiskMan system (hence the name “flow” field: they are usually used to send the user off down different paths).

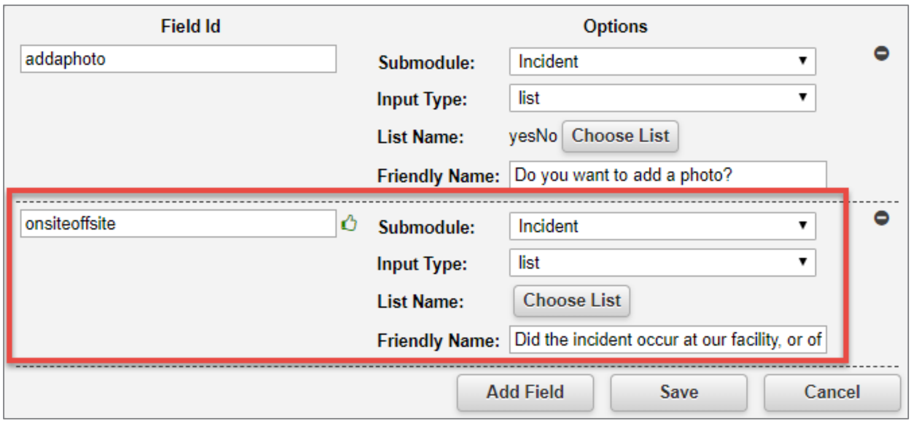
We’re going to use the example of whether an incident occurred at one of our sites, or if it occurred offsite.

If the user says that the incident occurred at one of our sites, the next steps they will see will be **Site** and **Department**.

If they indicate the incident happened offsite, they will be taken straight to the **Location** step.

Click the 〒 icon in the toolbar to bring up your list of flow fields.

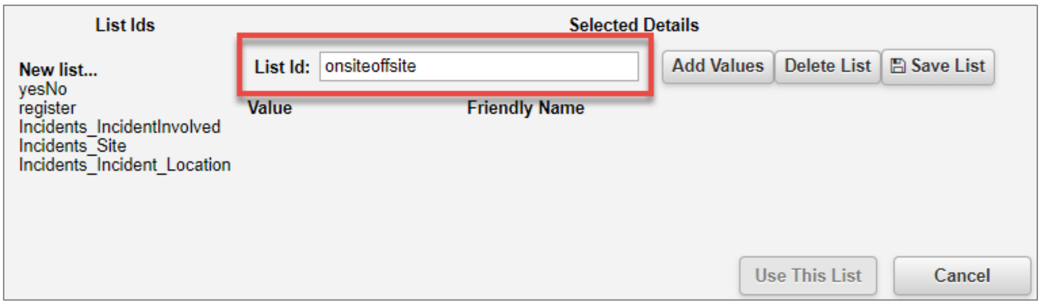
We’re going to enter onsiteoffsite as the **Field ID**, and the **Friendly Name** will be Did the incident occur at our facility, or offsite?



Field Id: addaphoto
Submodule: Incident
Input Type: list
List Name: yesNo
Friendly Name: Do you want to add a photo?

Field Id: onsiteoffsite
Submodule: Incident
Input Type: list
List Name:
Friendly Name: Did the incident occur at our facility, or of

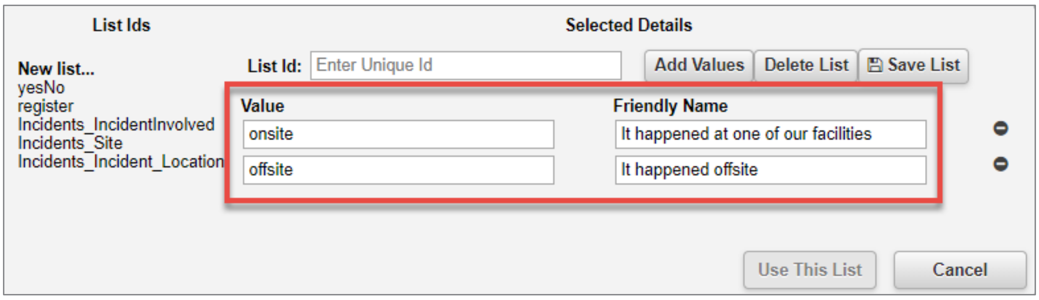
Now we’ll click **Choose List**, and give our new list a unique ID:



List Ids
New list...
yesNo
register
Incidents_IncidentInvolved
Incidents_Site
Incidents_Incident_Location

Selected Details
List Id: onsiteoffsite

Next we’ll add the values we want in our list by clicking the **Add Values** button, enter the details we want, and then click the **Add Values** button again for the second value. It will now look something like this:

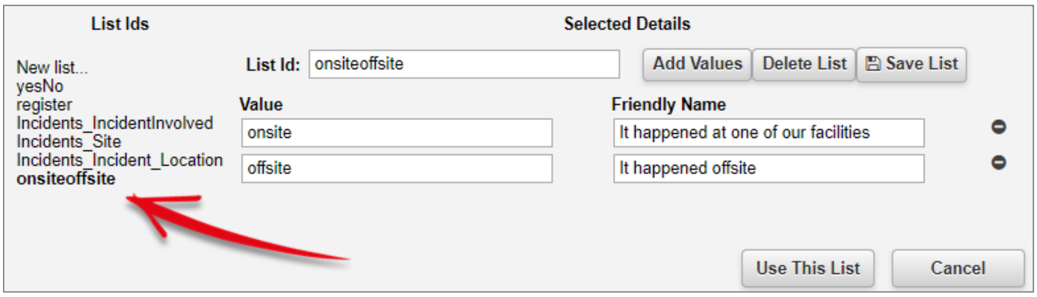

List Ids
Selected Details
Add Values
Delete List
Save List
Use This List
Cancel

New list...
yesNo
register
Incidents_IncidentInvolved
Incidents_Site
Incidents_Incident_Location

List Id: Enter Unique Id

Value	Friendly Name
onsite	It happened at one of our facilities
offsite	It happened offsite

Note that the **Value** should be the unique property, and **Friendly Name** is what the user will see. Once we have all the values we need, click **Save List**. Note that your new list is now one of those listed on the left:


List Ids
Selected Details
Add Values
Delete List
Save List
Use This List
Cancel

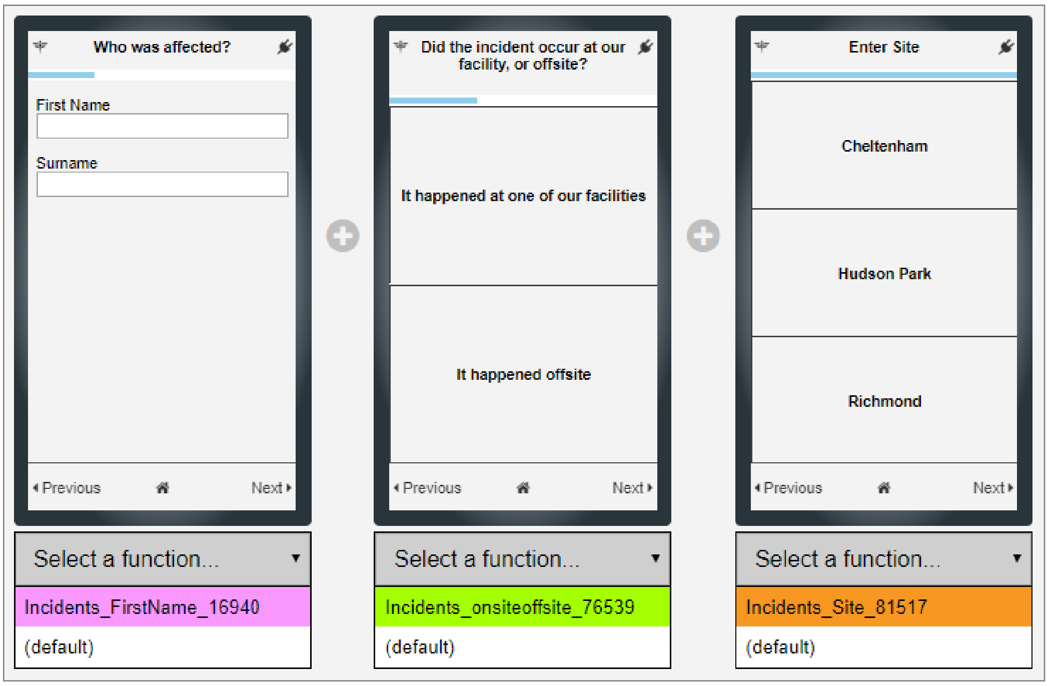
New list...
yesNo
register
Incidents_IncidentInvolved
Incidents_Site
Incidents_Incident_Location
onsiteoffsite

List Id: onsiteoffsite

Value	Friendly Name
onsite	It happened at one of our facilities
offsite	It happened offsite

Click the **Use This List** button, and then click the **Save** button on the next dialog.

You can then add your new flow field in the appropriate place, and then configure the paths after it accordingly:


Who was affected?
First Name
Surname
Previous
Next
Did the incident occur at our facility, or offsite?
It happened at one of our facilities
It happened offsite
Previous
Next
Enter Site
Cheltenham
Hudson Park
Richmond
Previous
Next
Select a function...
Select a function...
Select a function...

Incidents_FirstName_16940
(default)

Incidents_onsiteoffsite_76539
(default)

Incidents_Site_81517
(default)

Further functionality that RiskMan can help you with

When editing a script in advanced mode, there is some additional functionality that we have exposed, but we cannot expect you to understand how to do them as it’s literally the programming language. The two key areas of functionality are **filtering lists** and defining **sets**.

1.1.27 Filtering Lists

Allows us to restrict the values visible in a list. For example, you might have a site list containing the values:

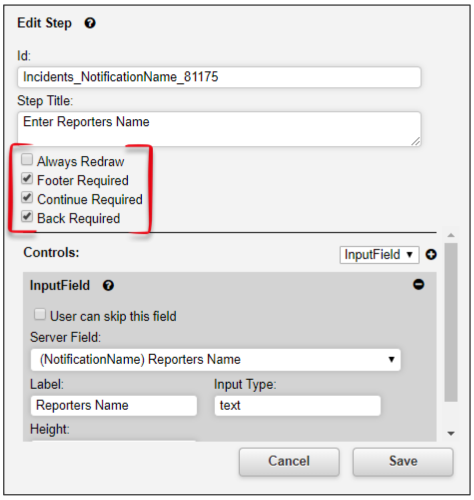
- Site A
- Site B
- Site C
- Site D

We have the ability to add a filter to that field, if, for example you didn’t want Site C to be available to choose.

1.1.28 Sets

A Set (verb) is quite literally setting a property for a step in your path. For example, if you have “Reporter’s Name” in your path, you might want to auto-populate the logged in **user’s** or **display name** (Reporters Name is restricted at this time) to save time. This can be achieved by creating a Set.

1.1.29 Additional properties displayed in Advanced mode



Id: Incidents_NotificationName_81175

Step Title: Enter Reporters Name

☐ Always Redraw
☑ Footer Required
☑ Continue Required
☑ Back Required

☐ User can skip this field

Server Field: (NotificationName) Reporters Name

Label: Reporters Name

Input Type: text

Height:

When editing a step in advanced mode, there 4 properties visible:

- Always Redraw
- Footer Required
- Continue Required
- Back Required

These properties should only be modified on advice from RiskMan.