

Release Notes

For RiskMan Version 18.07

Last reviewed October 2019



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Introduction

This document provides an overview of new features, and enhancements to existing features, included in RiskMan version **1805**. The previous released version of RiskMan was 1602.

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

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

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

New Features

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

Significance Scale Explanation

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

Need for Training Scale Explanation

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

Note

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

Reports Version 2

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

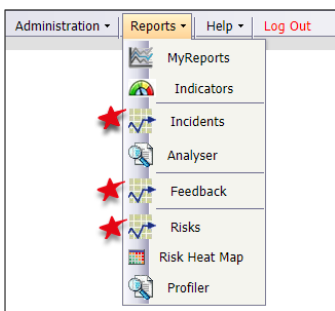
One of the fundamental reasons for using a system like RiskMan is so that you can generate meaningful qualitative reports. Such reports help you answer important questions about what is happening in your organisation, and will help inform key decisions made at all levels of your business.

In version 18.06 of RiskMan, we have completely revamped the report creation and distribution process. The aim of this document is to provide you with an understanding of how we have changed the system, so that you can decide if and how you want to implement the new functionality in your organisation.

How did report creation, My Reports, and the Report Library work previously?

The following summary of current functionality has been included in order for us to clearly illustrate how the Reports experience has changed.

Creating Reports



The ability to create reports is a per-register user permission.

When a user has permission to create reports in a register, a menu option appears, as denoted here.

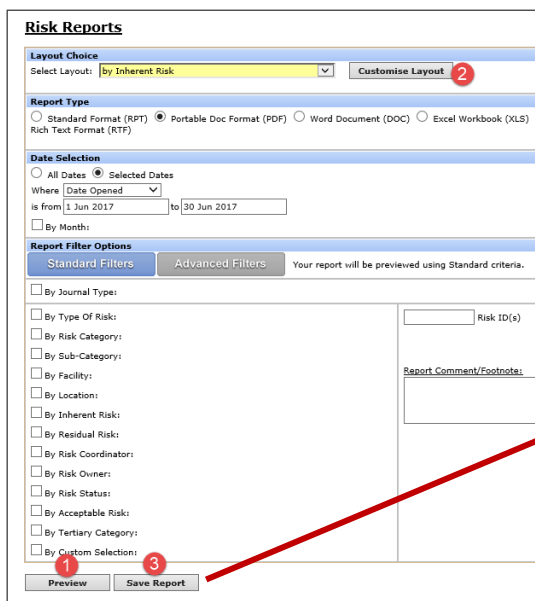
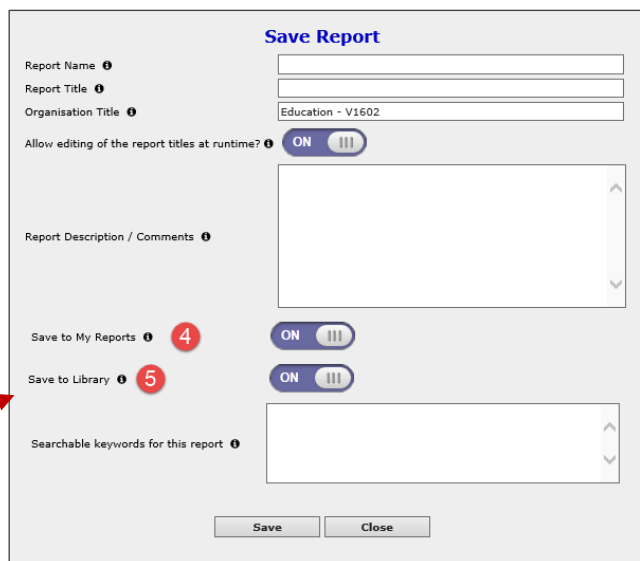
Clicking any of these menu options takes you to the report *creation* page for the respective register.

Saving Reports

From that page, the user may select an appropriate layout, apply the necessary filtering, and **Preview** ❶ the report. We usually refer to this as **ad-hoc reporting**.

The ability to **customise report layouts** ❷ is a separate user permission, so you can allow a user the ability to create reports, but not let them potentially make unwanted changes to existing report layouts.

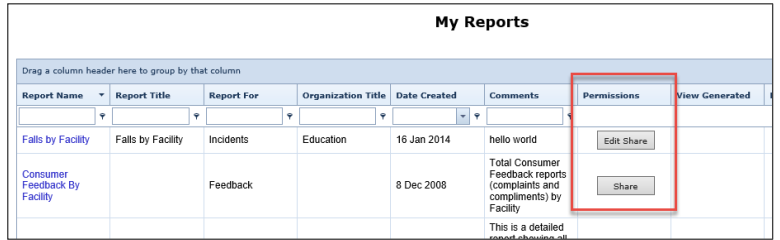
Finally, users with the appropriate permission will be able to **save the current report setup** ❸ either as a **My Report**, or to the **Report Library**, or both.

Working with My Reports

The My Reports page contains all the reports the user has permission to see – whether they created the report themselves, or was shared to them by another user.

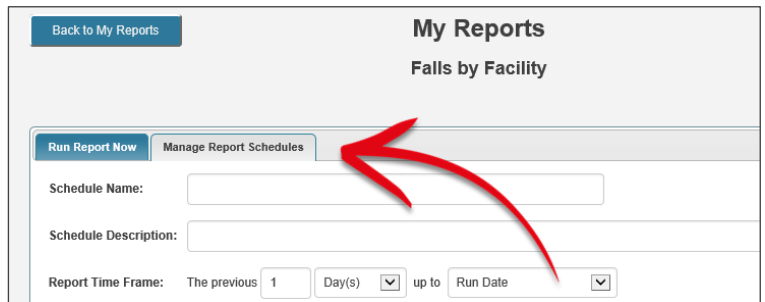
If the user has permission to share reports, they will see the share/edit share buttons in the **Permissions** column, highlighted here.



Report Name	Report Title	Report For	Organization Title	Date Created	Comments	Permissions	View Generated
Falls by Facility	Falls by Facility	Incidents	Education	16 Jan 2014	hello world	<input type="button" value="Edit Share"/>	
Consumer Feedback By Facility		Feedback		8 Dec 2008	Total Consumer Feedback reports (complaints and compliments) by Facility This is a detailed report.	<input type="button" value="Share"/>	

If the user has the permission to create **schedules** so that the report is generated automatically, they will see the **Manage Report Schedules** tab when they select a report.

Schedules can only be created and generated for the single user; that is to say, a user cannot create a schedule and then nominate a group of people as recipients of that report when it is generated.

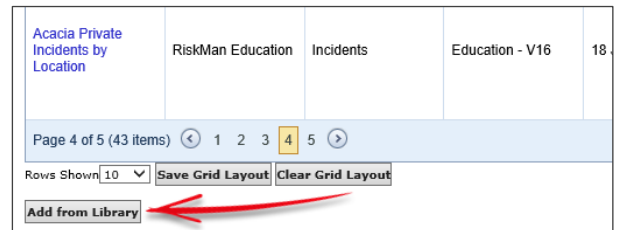


Interestingly, there is no user permission around deleting shared My Reports. This meant that any user who can see a My Report, can also delete that report, irrespective of whether it was a report that user created, or a report that was shared to them. Needless to say, this is functionality that has been addressed in the new reports environment.

Report Library

Users with the appropriate permission are able to access the **Report Library** from the My Reports page.

In the Report Library, a user can search the available reports for something that suits their requirements. They can then add a copy of that report to their own My Reports page.

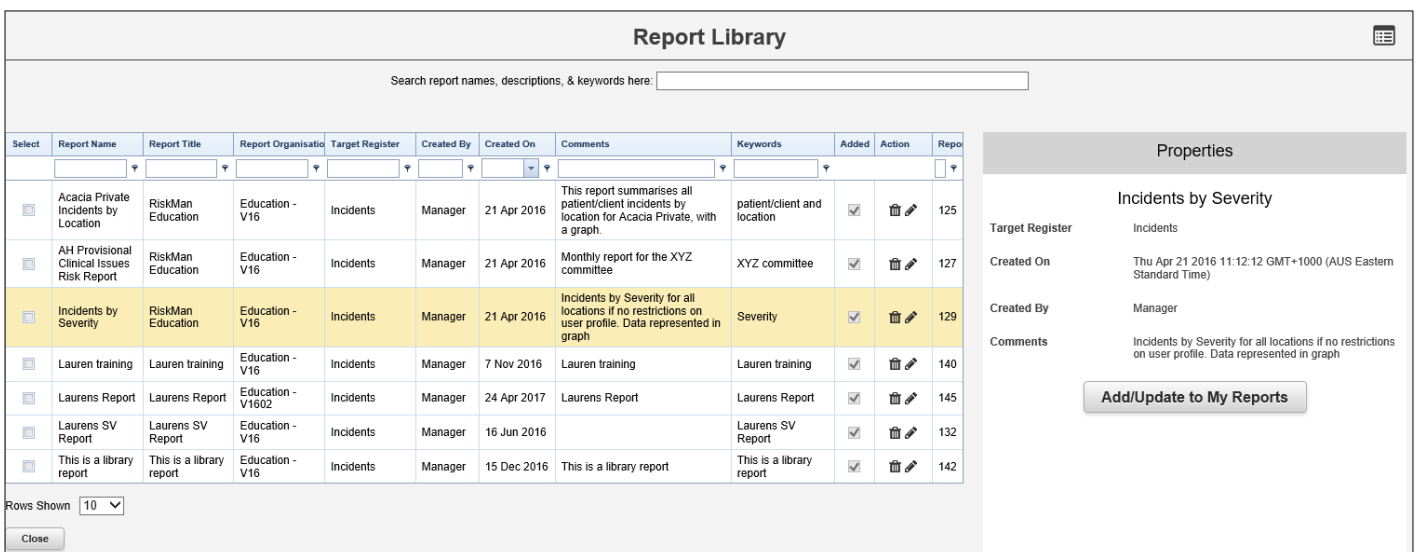


Acacia Private Incidents by Location	RiskMan Education	Incidents	Education - V16	18
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Page 4 of 5 (43 items) 1 2 3 4 5

Rows Shown 10 Save Grid Layout Clear Grid Layout

Add from Library



Select	Report Name	Report Title	Report Organisation	Target Register	Created By	Created On	Comments	Keywords	Added	Action	Repo
<input type="checkbox"/>	Acacia Private Incidents by Location	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	patient/client and location	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	125
<input type="checkbox"/>	AH Provisional Clinical Issues Risk Report	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	Monthly report for the XYZ committee	XYZ committee	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	127
<input type="checkbox"/>	Incidents by Severity	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	Incidents by Severity for all locations if no restrictions on user profile. Data represented in graph	Severity	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	129
<input type="checkbox"/>	Lauren training	Lauren training	Education - V16	Incidents	Manager	7 Nov 2016	Lauren training	Lauren training	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	140
<input type="checkbox"/>	Laurens Report	Laurens Report	Education - V1602	Incidents	Manager	24 Apr 2017	Laurens Report	Laurens Report	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	145
<input type="checkbox"/>	Laurens SV Report	Laurens SV Report	Education - V16	Incidents	Manager	16 Jun 2016		Laurens SV Report	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	132
<input type="checkbox"/>	This is a library report	This is a library report	Education - V16	Incidents	Manager	15 Dec 2016	This is a library report	This is a library report	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>	142

Rows Shown 10

Properties

Incidents by Severity

Target Register: Incidents

Created On: Thu Apr 21 2016 11:12:12 GMT+1000 (AUS Eastern Standard Time)

Created By: Manager

Comments: Incidents by Severity for all locations if no restrictions on user profile. Data represented in graph

The Report Library was not a very widely used tool (introduced in version 1601, January 2016).



What has changed in Reports Version 2?

The following are the differences between how reports used to work, and how reports work in version 2.

Changes to Terminology

The first change we have made is the **Reports** menu option has been re-named **Analysis**:



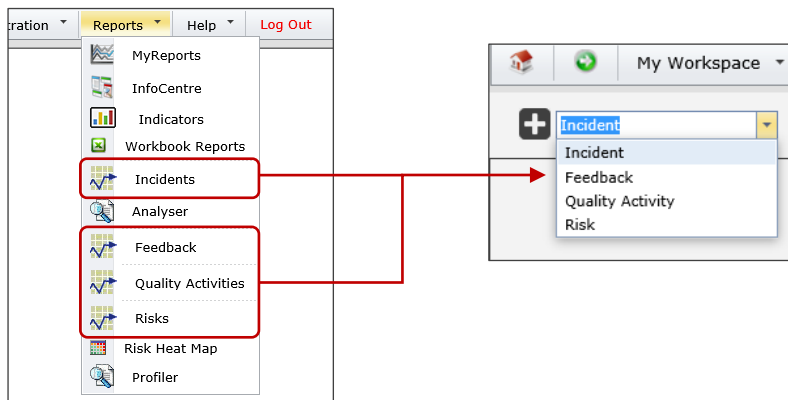
Within this menu option are the different analysis tools in RiskMan: the InfoCentre, Indicators, Workbook Reports, Analyser, and, **Reports**. We specifically wanted to re-purpose the term “reports” to represent the qualitative data reports that can be generated in RiskMan.

Changes to the User Interface

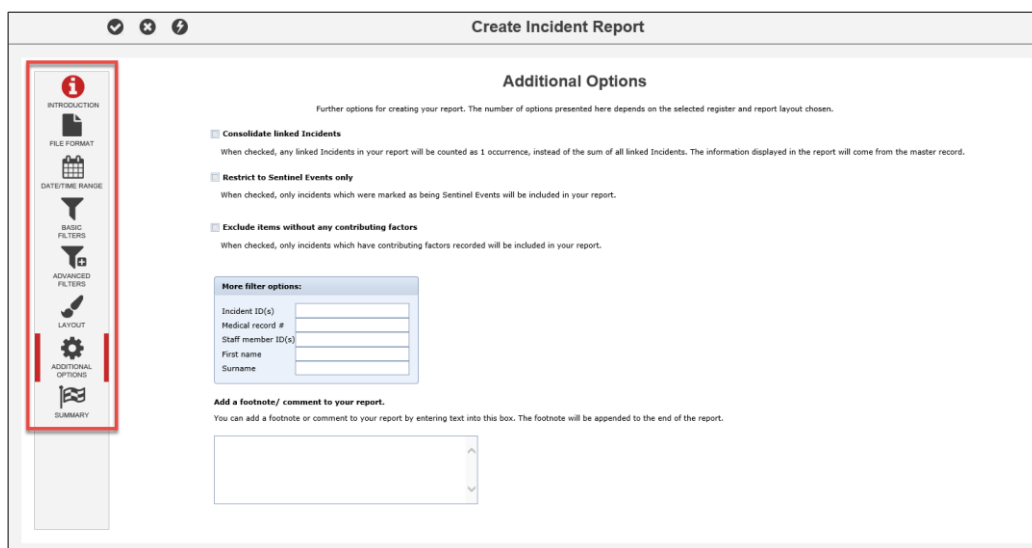
Creating Reports

The interface has been designed to closely mirror the Alerts Version 2 experience.

Instead of the separate menu items, a drop down list shows the user the registers for which they may create reports:



The report creation page also follows on from the alert creation page. The various settings you can configure for a report are arranged into logical groupings. The idea is to go from top to bottom through those option groups, and configure what is required. Refer to the **Creating Reports** guide for detailed information.



Saving Reports

When a user creates a report and wants to save it, they will be prompted to choose the save location depending on the permissions they have for the register in question:

Where would you like to save this report?

My Reports

Reports Library

My Reports & Reports Library

In the above example, the user has permission to save a report to both the Library, and in their My Reports. The user will then be able to select first, the My Reports folder, then the Library folder:

Please select a folder to save the report to My Reports?

- My Reports
 - 1st level folder
 - Management Reports
 - Feedback
 - Quarterly Feedback Reports
 - Incidents
 - WHS Reports
 - Miscellaneous
 - Clinical Reports
 - Quality Activities
 - Risks

Please select a folder to save the report to Reports Library?

- Reports Library
 - Contracts
 - Created by NUser4 (shared by nuser4)
 - Feedback
 - Master folder
 - Incidents
 - Exec reports
 - Quality Activities
 - Nuser (shared by nuser4)
 - Risks (shared by tango)
 - Nuser (shared by nuser4)
 - test

The My Reports Experience

Previously, a user owned **reports**, which existed in their My Reports page. If they had permission to do so, they could share an individual report with other users.

Now, a user will own **folders**. Folders will be the entity that is shared with other users, instead of on a report-by-report basis.

This will streamline the creation, arranging, and sharing of reports in the system.

The screenshot shows the 'Reports' page in RiskMan. The top navigation bar includes 'My Workspace', 'Management', 'Administration', 'Analysis', 'Help', and 'Log Out'. The user is identified as 'System Manager (Manager)'. The main content area is titled 'My Reports' and features a search bar (3) and a table of reports. The table has columns for 'Report Name', 'Has Schedule?', 'Generated Reports', and 'Date Created'. A report titled 'WHS Incidents by Facility' (2) is listed with 'No' for 'Has Schedule?' and '14 Nov 2017' for 'Date Created'. Below the table is the 'Report Details' section (4) for 'WHS Incidents by Facility', showing fields like 'Target register' (Incidents), 'Created on' (14 Nov 2017), 'Created by' (Manager), 'Report description' (This report should be tabled every month at the WHS review committee meeting), 'Reports generated by schedules' (No), 'Added from library?' (No), 'Original report title' (WHS Incidents by Facility), and 'Original organisation title' (RiskMan Education). On the left, a folder structure (1) shows 'My Reports' containing 'Incidents reports (migrated)', 'Risks reports (migrated)', and 'WHS reports'. A toolbar (5) with icons for lightning bolt, pencil, trash, share, and calendar is positioned above the folder structure.

❶ **Folder structure:** These are the folders containing reports. There is a limit to the number of subfolders you are able to create, determined by your system administrator. The maximum number of subfolder levels is five.

❷ **Report list:** When you select a folder, the reports saved in that folder are displayed here.

❸ **Search this folder:** You can also search for reports from the current folder by name, description, and keywords. Start typing your search term and any matching reports will appear in the report list.

❹ **Report details:** This is the information we entered in the **Summary** option group when the report was created.

❺ **Report actions:** When you select a report, the available actions will appear, based on your individual user permissions.



Sharing a My Report Folder with Other Users

If you have the permission to do so, you can share folders from your My Reports with other users. When other users run the reports from folders shared to them, the data that appears in the resulting reports will be based on *that user's* domain, rather than *your* domain. This means there is no risk of users potentially being able to see information to which they have no permission.

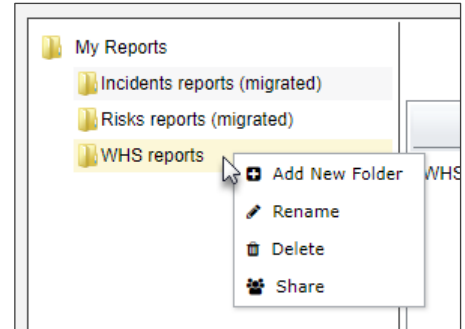
Start by finding the folder you want to share, and right click on it with your mouse. This brings up the available options:

Add New Folder creates a new folder on the next level within the current folder.

Rename allows you to change the name of the current folder.

Delete obviously deletes the current folder, however you cannot delete a folder unless it is already empty.

Share will allow you to set the share permissions for the current folder.



There are 3 levels of folder sharing permissions in My Reports:

- Read
- Read / Write
- Read / Write / Maintain

Here's what each level of permission means:

PERMISSION	WHAT CAN THE USER DO?
Read	The user can see and run all the reports in the folder. They cannot add reports to the folder.
Read / Write	The user can see and run all the reports in the folder. They can add reports to the folder (provided they have the user permission to save reports).
Read / Write / Maintain	The user can see and run all the reports in the folder. They can add reports to the folder (provided they have the user permission to save reports). The user can modify the sharing permissions of the folder. The user can change the name of the folder. The user can add, modify, and delete their own subfolders. The user can move reports to other folders (refer to page 29). The user can move the folder to another folder (refer to page 30). The user can delete the folder, provided the folder contains no reports or subfolders.

Deleting a Report

Even if a user has Read / Write / Maintain permission to a folder, they will not be able to delete a report which is not their own.

The only users who can delete a report are the **report's creator** and a user with the **Report Library Administrator** permission (*General > Reporting Permissions > Is Reports Library V2 Administrator*).

Assigning Sharing Permissions

My Reports Permissions

Save
Close

Folder Name

1 Share with all users (Read Only):

2 Share with specific users:

1. Search for a user:

2. Assign level of permission:

✔ Grant Read

✔ Grant Read/Write

✔ Grant Read/Write/Maintain

Users with Read permission:

✘ Remove

Users with Read/Write permission:

✘ Remove

Users with Read/Write/Maintain permission:

✘ Remove

3 Share with an entire Template of users:

1. Select a Register:

Select Register

2. Select a Template of users:

Select an Option

3. Assign level of permission:

✔ Grant Read

✔ Grant Read/Write

✔ Grant Read/Write/Maintain

Templates with Read permission:

✘ Remove

Templates with Read/Write permission:

✘ Remove

Templates with Read/Write/Maintain permission:

✘ Remove

1 Share with all users: Allows all users with permission to access Reports the ability to see this folder with **read only** permission.

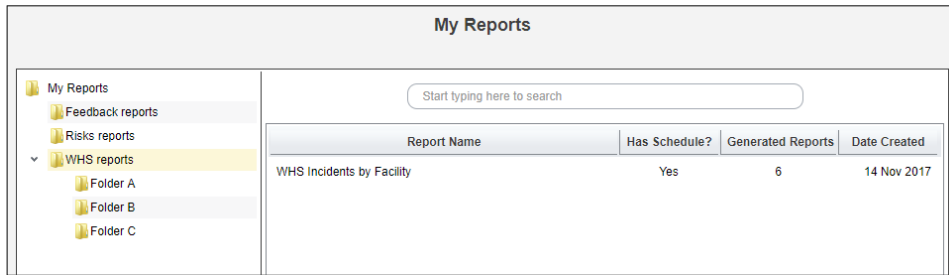
2 Share with specific users: Start typing a user's name in the text box. When you find the desired user, grant them the level of permission you want them to have. Their name will be added to the respective list box on the right hand side. To remove a user, select their name from one of the 3 list boxes and click the **Remove** button.

3 Share with entire Template of users: Select the register which contains the template of users to whom you want to grant permission, then select the desired template from the second drop down box. When you find the desired template, grant it the level of permission you want it to have. The template will be added to the respective list box on the right hand side. To remove a template, select its name from one of the 3 list **boxes** and click the Remove button.

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It should be noted that sharing permissions are not “cascaded” to any subfolders.

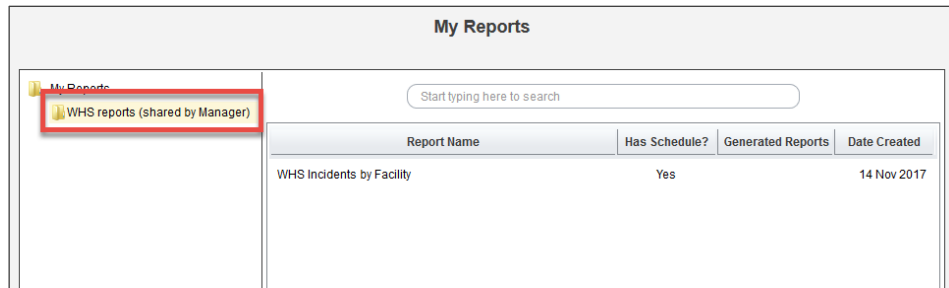
Let’s look at the following folder structure example:



The screenshot shows the 'My Reports' interface. On the left, a tree view shows 'My Reports' expanded to 'WHS reports', which contains 'Folder A', 'Folder B', and 'Folder C'. The main area displays a search bar and a table of reports.

Report Name	Has Schedule?	Generated Reports	Date Created
WHS Incidents by Facility	Yes	6	14 Nov 2017

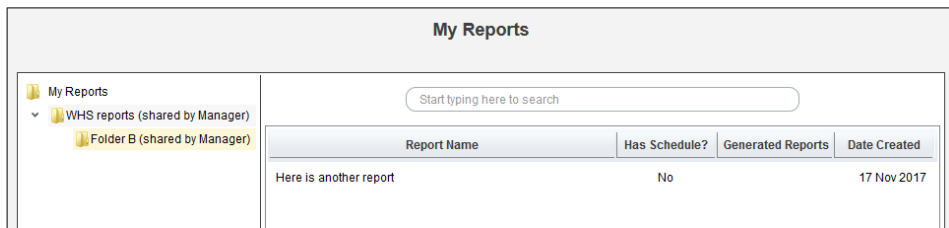
Now we will grant the user **Brett** read only permission to the **WHS reports** folder. When a user has a folder shared with them, the folder title appears as follows:



The screenshot shows the 'My Reports' interface. The 'WHS reports' folder in the tree view is now labeled '(shared by Manager)' and is highlighted with a red box. The main area displays the same table of reports as the previous screenshot.

Report Name	Has Schedule?	Generated Reports	Date Created
WHS Incidents by Facility	Yes		14 Nov 2017

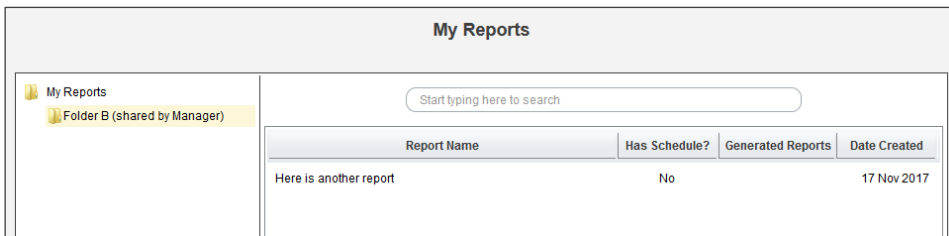
Note that Brett cannot see the other 3 folders in the WHS reports folder! Now we’ll grant Brett read only permission to **Folder B**. Here is what Brett’s view will be:



The screenshot shows the 'My Reports' interface. The 'WHS reports' folder and its subfolder 'Folder B' are now labeled '(shared by Manager)'. The main area displays a table with one report.

Report Name	Has Schedule?	Generated Reports	Date Created
Here is another report	No		17 Nov 2017

As you can see, permissions apply only to the individual folder concerned, and not the subfolders within it. But what if we give Brett permission to see **Folder B** but **NO** permission to the **WHS reports** folder? Here is the result:



The screenshot shows the 'My Reports' interface. Only 'Folder B (shared by Manager)' is visible in the tree view. The main area displays the same table with one report as the previous screenshot.

Report Name	Has Schedule?	Generated Reports	Date Created
Here is another report	No		17 Nov 2017

New User Permissions Model

a. On the **General** tab:

- **Can Access Reports V2**

This allows you to see the menu option Analysis > Reports.

- **Is Reports Library V2 Administrator**

This allows you to:

- See all folders in the Report Library.
- Modify the sharing permissions of all folders in the Report Library.
- Delete any report, provided you have at least the Read/Write permission for the folder that contains the report you wish to delete.

- **Can View Reports Library V2**

Allows you to see the Report Library when you navigate to Analysis > Reports.

- **Can Share MyReports V2**

Allows you to share folders you have created in your My Reports.

b. On each **Register**:

- **Can Save Reports to Library V2**

Allows you to create reports and choose a folder in the Library as a save destination. You also need the permission “Can Create Reports V2”, and at least Read/Write permission to the desired folder.

- **Can View Reports V2**

Allows you to see reports for this register in Library and My Reports folders where you have at least the Read permission.

- **Can Create Reports V2**

Allows you to create reports for this register. This permission also allows you to **edit** existing reports (where you have at least the Read/Write folder permission).

- **Can Modify Custom Reports V2**

Allows you to modify report layouts for this register.

- **Can Schedule Reports V2**

Allows you to create schedules for generating reports automatically at the time frame you stipulate (if you are using the Scheduler option in your system).

Things That Have Not Changed

Report Layout Editor

The report layout editor has not changed as yet, and so the existing documentation remains current.

Report Scheduler

The report scheduler itself has not changed, however we now have a separate guide for this functionality, as many clients choose not to utilise this feature.

Switching to Reports Version 2

Here's what you need to consider with regards to Reports Version 2:

Should I use the Report Library in my organisation?

There are several factors which will influence whether you choose to utilise the Report Library in your organisation. These include, but are not necessarily limited to:

- The size of your organisation/RiskMan user base
- The abilities of your users who need to generate qualitative reports
- The degree of control you want to have over the reports that users ultimately generate in the system
- The capacity of the users who will administer the Report Library.

In many cases, implementing “My Reports” and sharing folders with users (containing reports relevant to them) will be enough to satisfy local or lower level reporting requirements.

We expect that the Report Library would be better suited to larger organisations. If you haven’t already done so, please feel free to contact RiskMan Support to discuss any questions that you may have: +61 3 9686 5456 or support@riskman.net.au.

Migrating your existing My Reports to the new interface

We recommend following these steps:

Stage 1 Investigate the new functionality	<ul style="list-style-type: none"> • Review all the new reports documentation to get an understanding of all the functionality. • Turn on the new user permissions for yourself in your demo, training, or other non-production site. • Experiment with the new functionality. Play with My Reports, Report Library, and creating and editing reports.
Stage 2 Determine your strategy	<ul style="list-style-type: none"> • Decide if you are going to utilise both My Reports <i>and</i> the Report Library, or just My Reports. • If the former, decide how you want to structure your Report Library folders. Advice can be found in the Report Library Administration guide, but please also ask RiskMan if you need assistance. • Consider which permissions you are going to grant to each user templates (do not apply them yet).
Stage 3 Migration step 1	<p><u>In your demo, training, or other non-production system</u>, navigate to <i>Administration > Tools > Migration Tools > Report Library Migration Tool</i>. If you cannot see the Tools menu under Administration, it is because you do not have the user permission <i>General Tab > Can modify Global Settings</i>.</p> <p>The migration must be done in two stages. Run stage one now – <u>do not complete stage two yet</u>.</p> <p>As described on the migration tool page, stage one migrates all of the existing My Reports in the system to Reports V2. Any user who has created at least one My Report will then have a folder in their My Reports V2 page with those reports in them. There will be one folder for each register that they have reports for. For example, there will be one folder called “Incidents (migrated)”, “Feedback (migrated)”, and so on.</p>
Stage 4 Review & test	<ul style="list-style-type: none"> • Verify that reports migrated successfully. • Apply permissions to User Templates as you decided in Stage 2. • Test the new functionality (and rejoice in being able to edit a My Report at last!).
Stage 5 Migration step 2	<ul style="list-style-type: none"> • Return to the migration tool and run step 2. This will completely remove access to the old My Reports and report creation pages, as well as remove the old user permissions associated with them.
Stage 6 Training and go-live	<ul style="list-style-type: none"> • Repeat stages 2 and 3 on your production/live site. • Consider the training and communication requirements you have to launch this new feature to your users. Perform training as necessary. • Once users have been educated, complete stage 4 on your live/production site. This is effectively your go-live! • Complete stage 5 on your live/production site. This should only be done once you are satisfied that the new features are setup and running as expected on your live system, as it cannot be undone.

Enhancements and Changes

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

Significance Scale Explanation

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

Need for Training Scale Explanation

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

Note

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

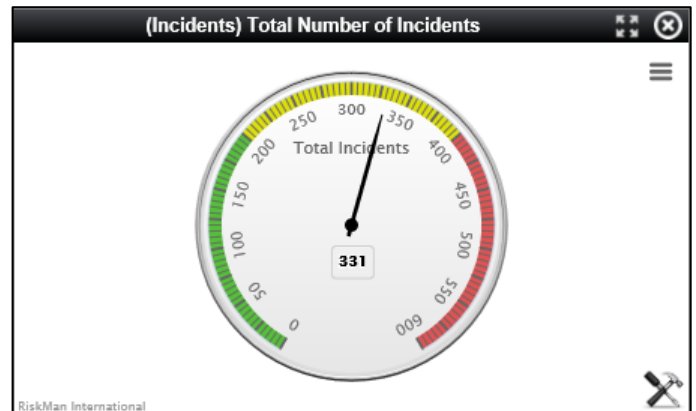
InfoCentre Broadcast Monitor

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

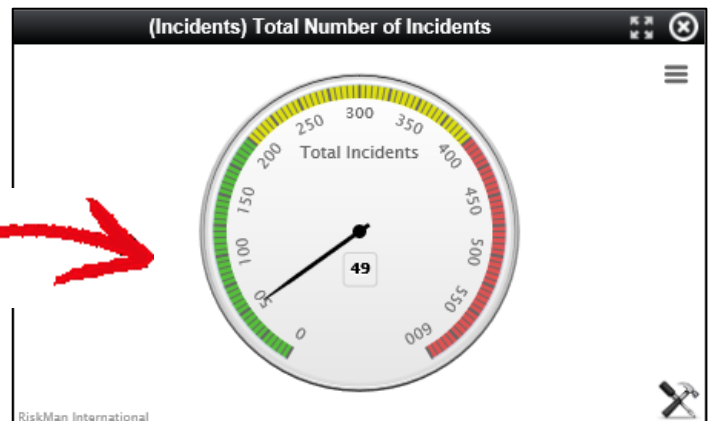
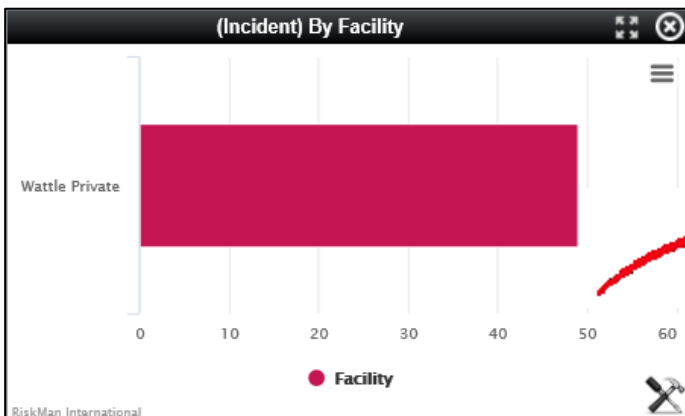
The InfoCentre is an interactive dashboard. To increase the interaction, RiskMan implemented the Broadcast Monitor. This allows widgets to “communicate” with each other. It allows you to use one Widget and drill down and exchange data with another Widget. Previously, if you wanted this feature, RiskMan would need to build this into the InfoCentre for you. Now, you can build a suite of Broadcast datasets yourself (based on user permission).

For example, you have displayed the Widget “Incidents by Facility”. If you click on one of the Facility values on the chart, it will display the values related to that Facility you have selected on other widgets like “Total number of Incidents”. The total number of incidents will now only count the amount for the Facility selected.

Widgets displayed without the Broadcast Monitor active



This image displays the Facility “Wattle Private” as the selected Facility, Broadcasted to the Total Number of Incidents Widget. Notice that the total number of incidents is now displayed as 49 opposed to all Facility incidents being 331



Broadcast Key	Value
@@Site	Wattle Private

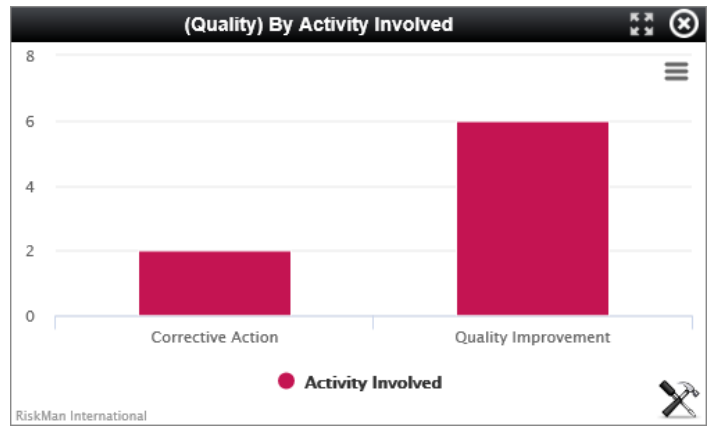
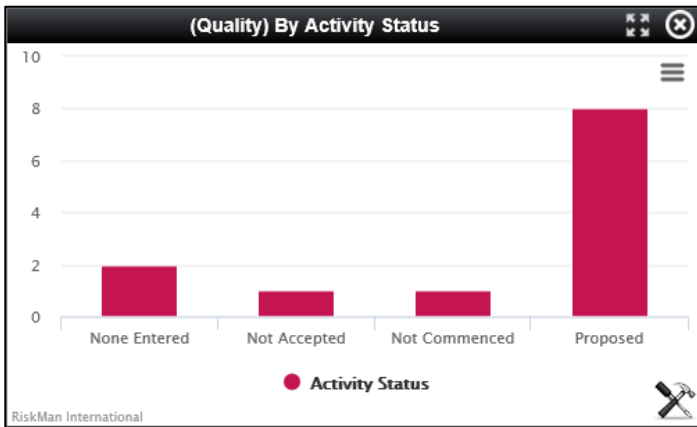
To be able to view the selected values that are currently Broadcasted, you will need to display the (System) Broadcast Monitor Widget. This is where you will be able to clear any Broadcasted data. To add the Broadcast Monitor

- 1 Click the icon
- 2 Search for the **(System) Broadcast Monitor** Datasource and select it
- 3 Click **Create Widget**

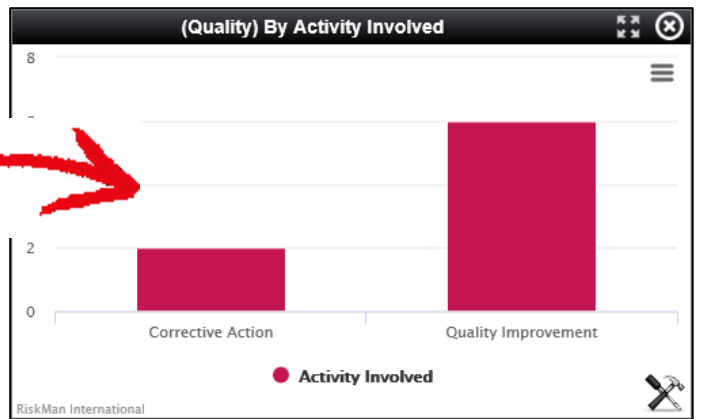
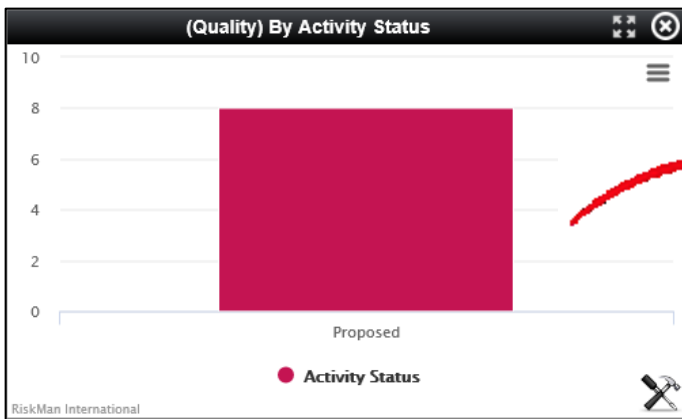


The Broadcast Monitor can be used across all registers, the same as using the InfoCentre in general. Another example of the Broadcast Monitor being used is Quality. You may wish to display a Widget that displays the Activity Status and Broadcast their Activity Involved.

Widgets displayed without the Broadcast Monitor active



This image displays the Activity Status “Proposed” as the selected Status, broadcasted to the “Activity Involved” Widget. Notice that the total number of activities Involved is now reflected based on the “Proposed” value opposed to all Activities.



(System) Broadcast Monitor

Broadcast Monitor Clear all

Broadcast Key	Value
@@Patient_Status	Proposed

Note:

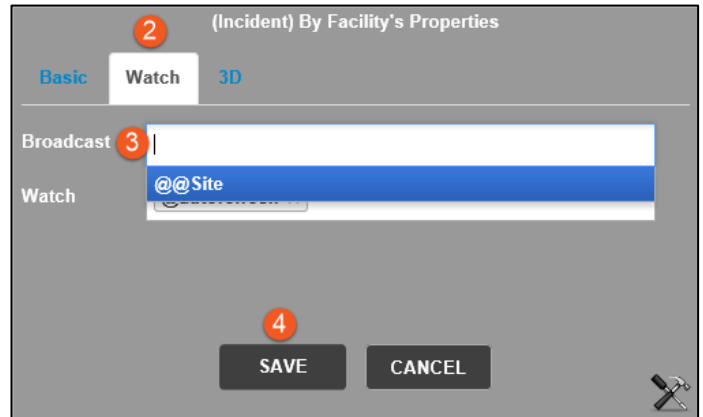
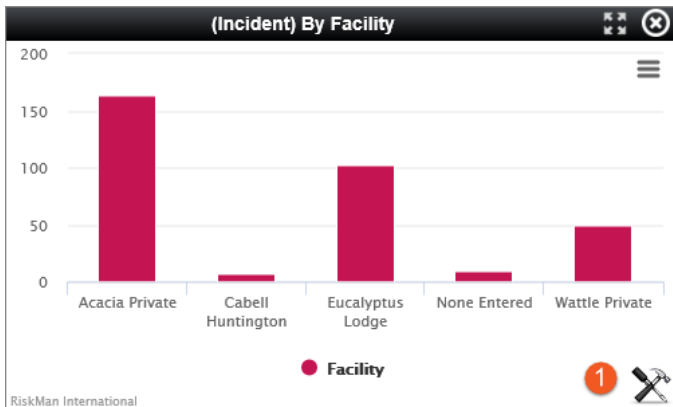
The Broadcast key will be labelled depending on the database name for the field that is being broadcast



Adding a Broadcast Monitor to a Widget

When you create a Widget, it will not have the Broadcast selected. This allows individual users to control the settings of their Widgets. If the Widget that has been added has been built with a Broadcast, the user is able to select this to be utilised with their widget.

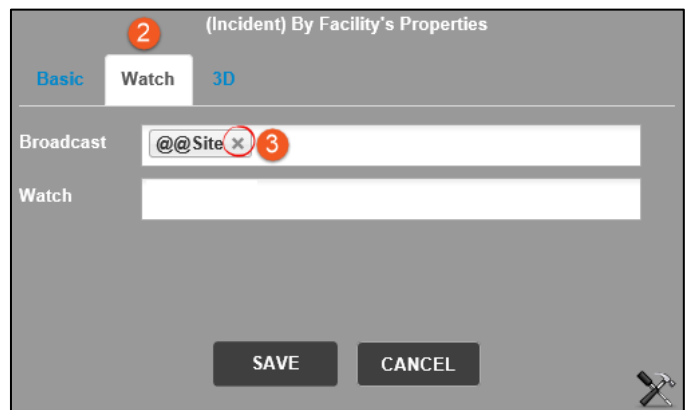
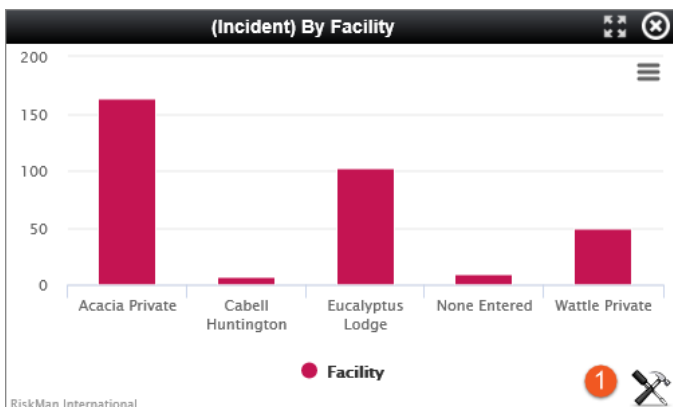
- 1 Click the Widget **Properties**
- 2 Click the **Watch** tab
- 3 Click the **Broadcast** field to select the Broadcast you want to set. This will display the available Broadcasts
- 4 Click **Save**



Clearing the Broadcast from a Widget

When you have the Broadcast displayed, you may want to clear it and remove the feature to display widgets independently.


- 1 Click the Widget **Properties**
- 2 Click the **Watch** tab
- 3 Click the cross on the Broadcast you don't want to display



Adding the Broadcast within the Datasource Builder

The Broadcast needs to be built within the Datasource of the Widget. You need to tell the Datasource to “communicate” with other Widgets.

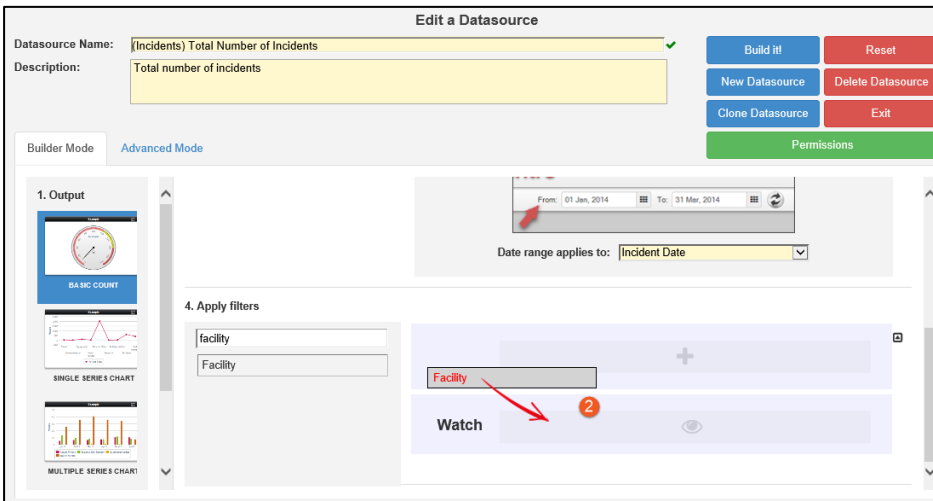
The example below will create the Broadcast that allows a user to click on a **Facility** that will display the total number of incidents for the selected Facility.

1 click on the  button and then select **New Datasource**. Alternatively, you can edit an existing Datasource if you need to add the Watch to an existing Datasource.

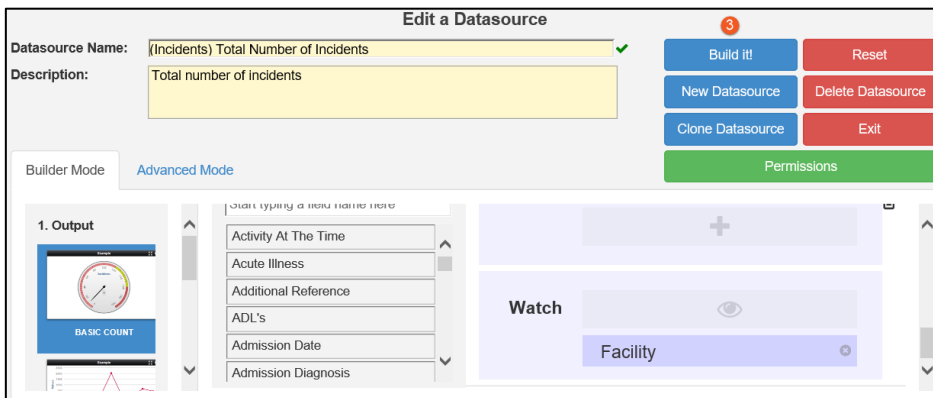
To add the Broadcast to the **Total number of Incidents** Datasource, click the edit icon 



2 Drop and drag the Facility field within the **Watch** column



3 Click **Build it!** to save the changes



Once you add the Broadcast to your Widget, you then need to add the correlating widget to your group.

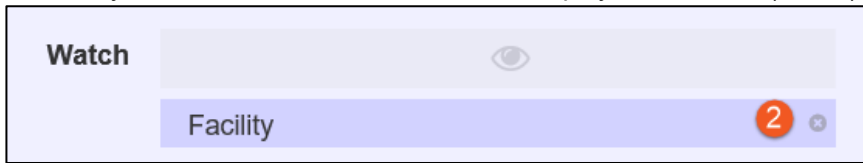


Delete a Broadcast from a Datasource

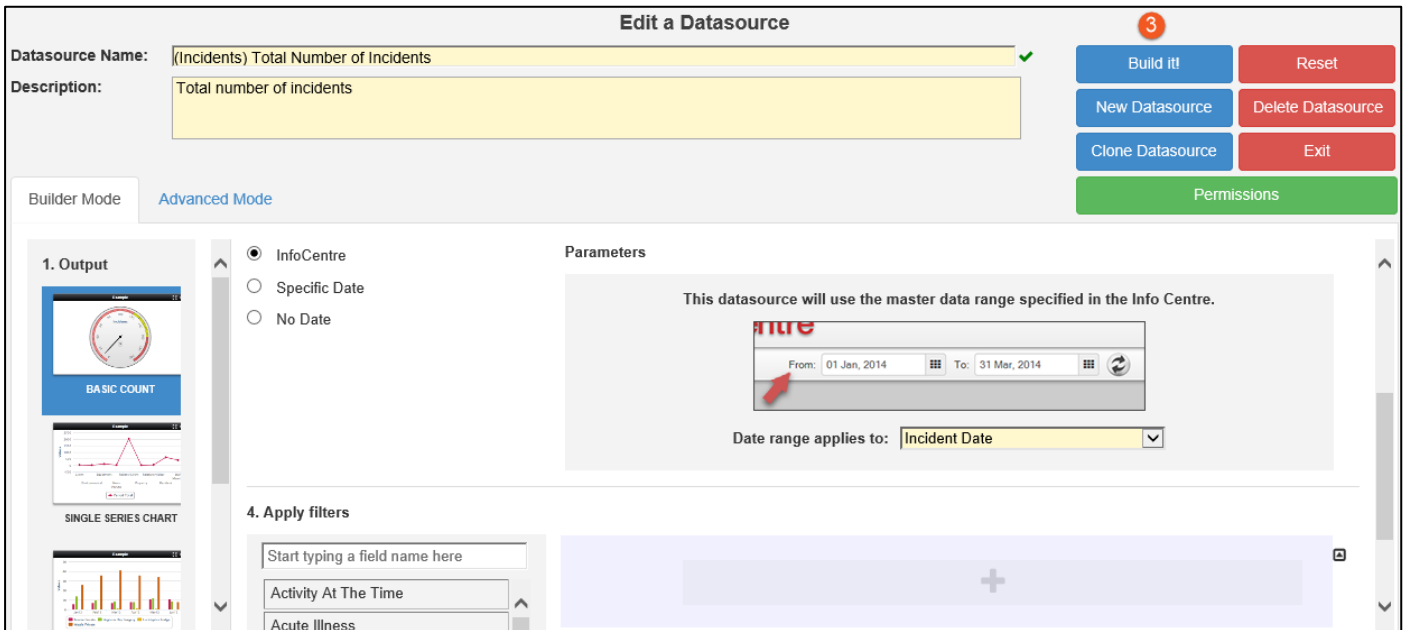
1 Click on the button and click the edit icon of the Datasource that you want to remove the Broadcast monitor from



2 Place your cursor over the **Watch** field to display the cross (delete) icon



3 Click **Build it!** to save the changes



Property Editor for Homepage and Infocentre Datasource Builder

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

We have provided a simplified property editor for the Homepage and Infocentre Widgets - version 18.06 introduces a new method to configure **advanced properties** for Widget datasources.

Previous versions offered only a text-based tool to enter structured configuration **settings**, this is now provided as a configuration table.

Please contact RiskMan Support on **+61 3 9686 5456**, or via email: support@riskman.net.au if assistance is required.

User Profiles

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

We have removed the “Reset fields to this type: drop down box. There is no longer a need to “assign a user twice” when creating or modifying a user profile.

<p>Previously</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: auto;"> <p>This user's position is: <input style="width: 100%;" type="text" value="Disability Support Worker-ISS AC"/></p> <p>This user's RiskMan User Type is: <input style="width: 100%;" type="text" value="SuperUser"/></p> <p>Reset fields to this type: <input style="width: 100%;" type="text" value="SuperUser"/></p> </div>	<p>Now</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: auto;"> <p>This user's position is: <input style="width: 100%;" type="text" value="Quality and Risk Manager"/></p> <p>This user's RiskMan User Type is: <input style="width: 100%;" type="text" value="SuperUser"/></p> <p style="text-align: right;"><input type="button" value="Reapply the above template permissions"/></p> </div>
--	---

The “Reapply the above template permissions button” is intended to be used if you select a user type (e.g. Manager), but then manually modify permissions, and then wish to reapply those same permissions.

Letter Builder

The following modifications have been made to the Letter Builder.

Generate for Multiple Records at Once

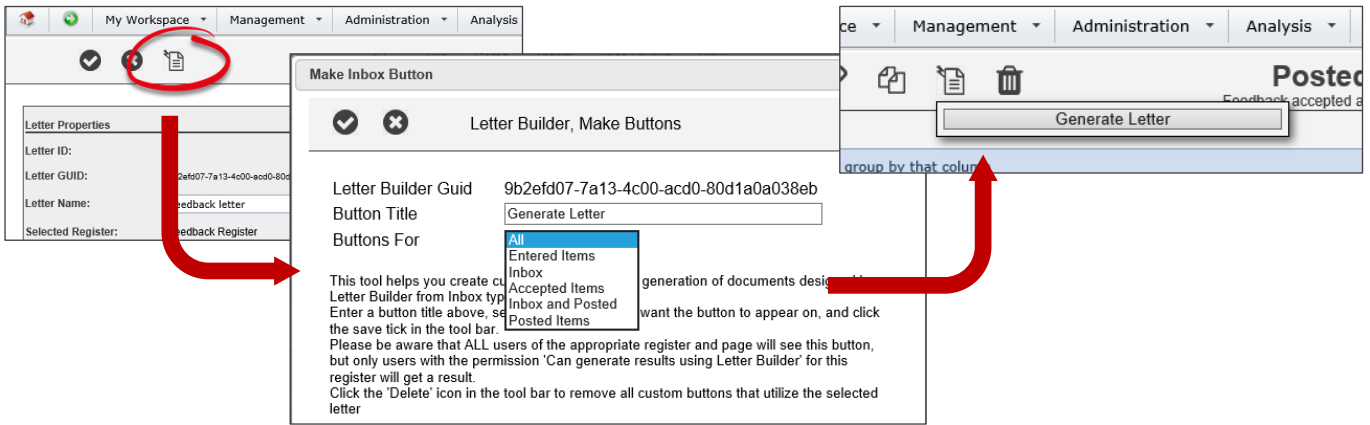
Significance: ● ○ ○ **Need for training:** ● ○ ○

Until now, you could only generate a document for one record at a time. We've now enabled the ability to select multiple records on your list page, and generate a single document with all the records in it in one go.

Choose the Page from Which Your Letter Can Be Generated

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

Until now, RiskMan Support needed to implement the letter on your chosen list page. We've now added the ability to do this yourself.



Journal Notifications

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

Item ID is now included in the Subject and Body texts of any Journal notification email. In addition, the email will also contain the Register Name in the Subject field.

Alerts Version 2: Alert Logging

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

Alert edit logging now includes details of changes to recipients, chaining and processes. For example, if a user is deleted from the recipients list, the “show edit details” will display the user who was removed.

Alerts Version 2: Alert Chaining “Show All”

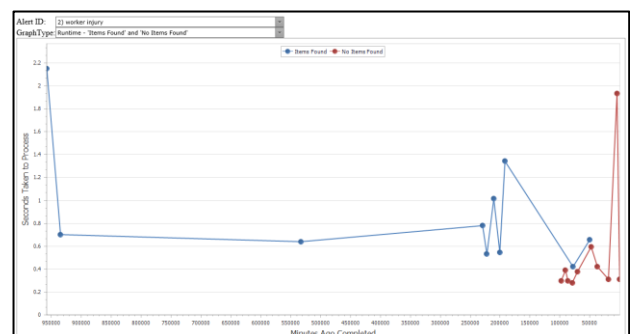
Significance: ● ○ ○ ○ **Need for training:** ● ○ ○ ○

Alerts will only be displayed if they have been selected and are part of the Alert Chain. To manage the list and to be able to add additional Alerts to this chain, a Show All button has been added to display all alerts to add additional to the chain

Alerts Version 2: Alert Logging Graph

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

Visually represent the alert logging in a graph and its performance. The graph displays Items found and No Items Found data. You can select the Alert you want view along with the graph type.



Alerts Version 2: Alert Current Status Window

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

The Alerts list page allows you to view the “current status of Alerts Vsn 2”. This is a live feed and a way to identify that Alerts are “working” behind the scenes. It will show you details as that last run cycle of alerts and the most most recent alert to process

ID	Name	Register	Alerts To	Is Enable	Created By	Created On	Last Edited By	Last Edited On	Times Activated	Last Activated On	Last Run Error	#
1	Incident at Arcacia private	Incident	Lauren Haupt (lhaupt@arcacia.com) <<Reporters Mana <<Original Reporte <<Field:SentinelDe	<input checked="" type="checkbox"/>	Manager	24 Apr 2017 14:06	Manager	24 Apr 2017 14:13	0		<input type="checkbox"/>	
2	worker injury	Incident	<<All Editors Mana <<Field:Username <<Field>LastVisitec	<input checked="" type="checkbox"/>	Manager	4 May 2017 11:37	Manager	17 Jun 2019 14:23	56	13 May 2019 14:38	<input type="checkbox"/>	
3	digest alert test	Incident	Anne Hayden (Ann	<input checked="" type="checkbox"/>	Manager	21 Jul 2017 15:05	Manager	21 Jul 2017 15:05	0		<input type="checkbox"/>	
4	(Incident) Employee Incident LH	Incident	Lauren (Lauren) Fernandez, Brett (B <<Reporters Mana <<Original Reporte <<Reporters Mana <<Field:Username	<input type="checkbox"/>	Manager	10 Aug 2017 12:15	Manager	20 Jul 2018 15:38	0		<input type="checkbox"/>	

Background Tasks Processing Status ✕

Pause page refresh.

Current Server Time: 17 Jun 2019 14:37:53

Alerts Vsn 1, waiting

Alerts V1 last completed a Process cycle at 17 Jun 2019 14:37:41 (12 seconds ago)

Alerts Vsn 2, waiting

The most recent Alert to complete was ID 3, 'digest alert test' at 17 Jun 2019 14:37:41 (11 seconds ago)

Alerts Version 2: Digest Emails

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

Digest emails are now available for Periodic Alerts. A time when you would use this, you may wish to see all the actions that are due this week.

List Pages

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

Changed the row count control on List Pages, for example the Inbox. This allows a user to enter a number instead of selecting a pre-defined number of records. Whilst a page is loading, you can also expect the action spinner to display that the records are loading.

A new global setting has been added to limit the number of records to display on one page. Explained below



Select a record to display the available tools.

Posted Incidents

Incidents accepted and reviewed, ready for reports.

Drag a column header here to group by that column

	Dist	ID	Incident Date	Reporters Name	Incident Involves	Facility	Location	Date Entered	Review Status	Severity	Surname
	None	3848	25 Apr 2019	Default User	Patient/Client	Acacia Private	Administration	30 Apr 2019	Pending	ISR 3 MEDIUM	Ragnarok
	None	3829	18 Jan 2019	Default User	Patient/Client	Acacia Private	Blood Bank	23 Jan 2019	Pending	ISR 4 MINOR	Gibbons
	1	3824	11 Jan 2019	System Mana...	Patient/Client	Eucalyptus Lo...	Administration	24 Apr 2019	Pending	ISR 4 MINOR	Spatt
	None	3819	8 Jan 2019	Default User	Patient/Client	Acacia Private	AC2	1 Feb 2019	Pending	ISR 5 NEAR M...	rtertert
	1	3811	7 Jan 2019	System Mana...	Patient/Client	Wattle Private	Administration	22 Feb 2019	Pending	ISR 4 MINOR	Johnson
	None	3780	9 Aug 2016	System Mana...	Non-Person	Cabell Huntin...	Administration	12 Sep 2016	Pending	ISR 4 MINOR	x
	1	3768	10 Apr 2015	Default User	Patient/Client	Acacia Private	CDAMS	5 Dec 2016	Pending	ISR 2 HIGH	Cicconexgfhxf...
	None	3764	28 Jan 2015	System Mana...	Patient/Client			28 Jan 2015	Pending		
	None	3758	15 Jan 2015	System Mana...	Patient/Client	Eucalyptus Lo...	CCU	15 Jun 2016	Pending	ISR 5 NEAR M...	fghj
	None	3742	28 Nov 2014	Default User	Patient/Client	Acacia Private	Cafeteria	28 Nov 2014	Pending	ISR 3 MEDIUM	Bill

3278 Records Found (Page 1 of 328)

Items per page: 10

Email Modifications

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

We have updated some of the email settings in the system, in particular to enable support for Office365. If your organisation uses, or is planning to use Office365, there will now be a more seamless integration between it and RiskMan.

Licensing

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

RiskMan has a number of licensing options, including site based or user-based licenses. In version 18.06 of RiskMan, we have further expanded the options on how licensing is structured. RiskMan can now offer a 'per register' architecture, allowing finer control of users in the system

For example, you may have 500 user licenses for your incident register and 100 for your risk register.

Key points:

- How licensing is implemented has also changed, previously it was based around the web server installation, but is now based around the database server and the specific database that RiskMan is implemented on. This has the advantage that a single licence can support any number of web servers attached to the database, supporting web farms and web gardens.
- In complicated scenarios, it is now possible to pre-licence a database (the database can hold multiple licences, it will use the applicable one for the current installation), preparing for installation on a specific SQL server. This can, for example, be useful in disaster recovery situations, or when new delivering of a new site.
- The upload page for licencing has changed, but still only requires a simple copy/paste or file upload of the supplied licence file. You will be doing this during consultation with RiskMan staff, who can assist.

Note

There will be no changes or impact to your current agreement with RiskMan

Old Feedback Register Improvements

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

If your RiskMan system was previously on version 15 of RiskMan and wanted to upgrade to version 16 may have encountered an issue with the Feedback module. The older version of feedback was not supported by versions of Internet Explorer above version 7. This has been improved to be more functional and useful to you. This change is automatically applied with upgrading to Version 18.06, unlike other features that are defaulted as off as previously mentioned in this document.

Key points:

- **Cross Browser compatible.**
Previously, old feedback was only compatible with Internet Explorer 7 in compatibility mode. You can now open Old Feedback with Chrome for example.
- **No longer an individual menu item.**
Old feedback is now managed through all menu items as all other registers. This also means that old feedback will not open another browser window to be managed.

Custom Report Crosstab Charts

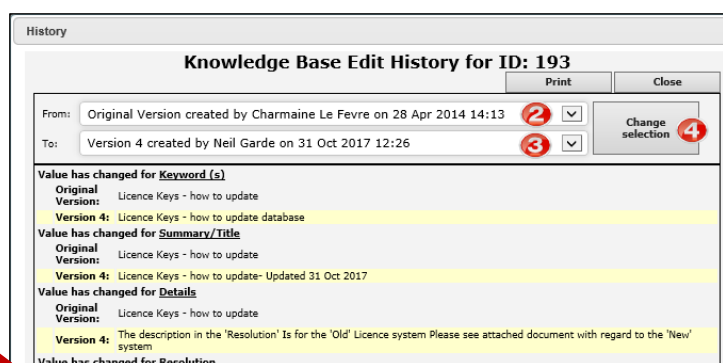
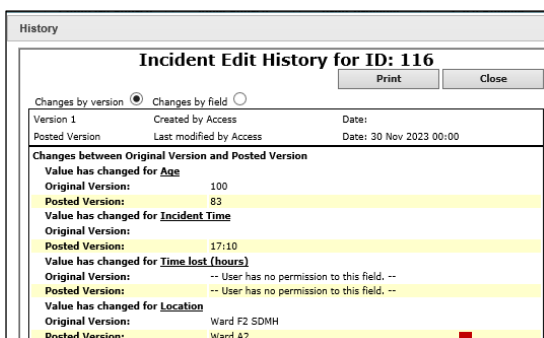
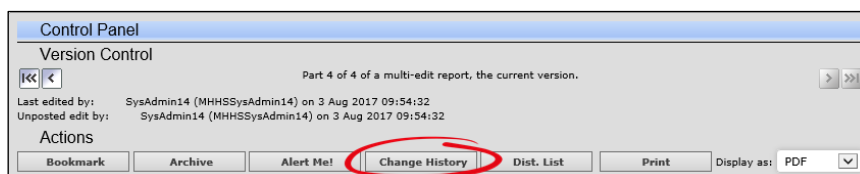
Significance: ● ○ ○ **Need for training:** ● ○ ○

You are now able to sort Crosstab Charts using alphanumeric values (previously we only offered alphabetic). In addition we have enabled chronological sorting of days or months. The sorting parameter must be enabled to use this feature. Please contact RiskMan Support on **+61 3 9686 5456**, or via email: support@riskman.net.au if assistance is required.

Change History

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

To improve the performance and user experience of the Change History feature within the control panel, users are able to select the versions that displays changes between each version. This ensures all changes are not displayed at once, potentially slowing the system down by loading all changes in one screen.





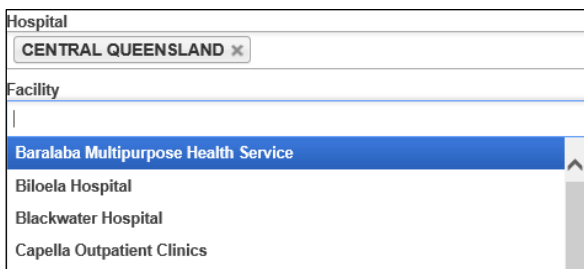
- 1 Click on Change History
- 2 Click the **From:** version to be displayed
- 3 Click the **To:** version to be displayed
- 4 Click change selection

Indicator Sub Setting Lists

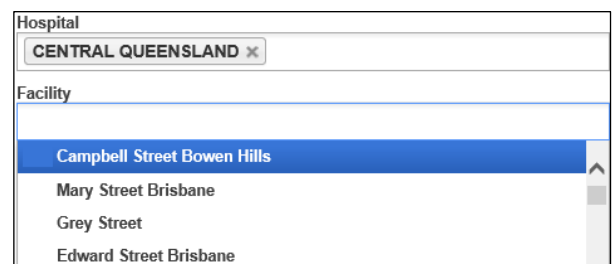
We’ve made it possible for indicator filters to properly filter out values when you want to filter by sub setting lists.

For example, let’s say you wanted to filter by Site and Location. Previously, when you selected a site, you would still see all locations from all sites, rather than just the locations for the site you selected.

Without sub setting: all facilities are shown



With sub setting: only facilities from the selected region shown

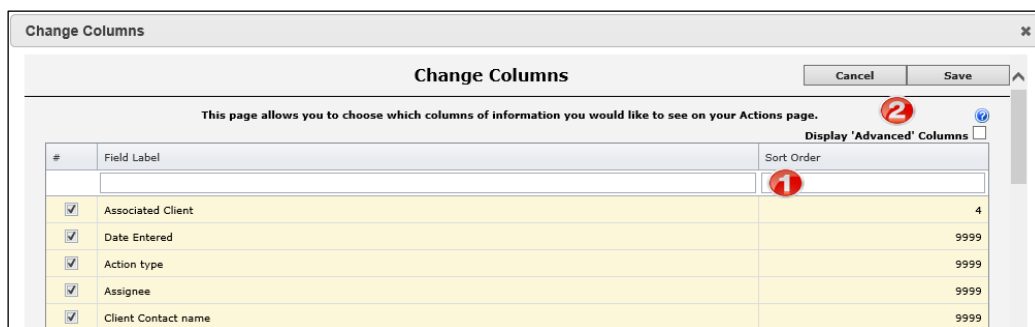


RiskMan will need to apply this feature to your site. Please contact us to discuss.

Change Columns: Managing Sort Order

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

This modification allows the sort order 1 of columns to be displayed by default. Previously, the sort order of your columns would only be displayed when **Display ‘Advanced’ Columns** 2 was selected.



Known Issue

After any configuration changes to the system, you may find that you get a “pink” error screen after changing your columns. The reason for this error is the list page assumes your system default setting and may now have a column displayed that you do not have permission to see.

How to Fix

Navigate to each user template and click save. Then apply **template changes** for all templates to resume your initial setting and avoid any error screens.

Note

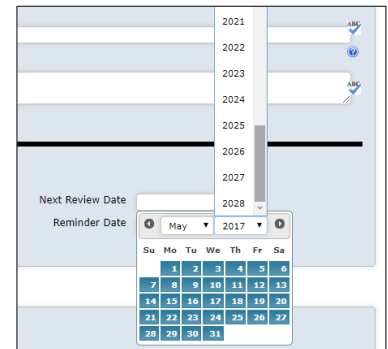
Please refer to the *User Template Guide* via *Help > Reference Guides > User Templates*.

Date Fields: Picker Tool

We've modified date pickers on the forms to show dates up to 10 years in the future.

Note

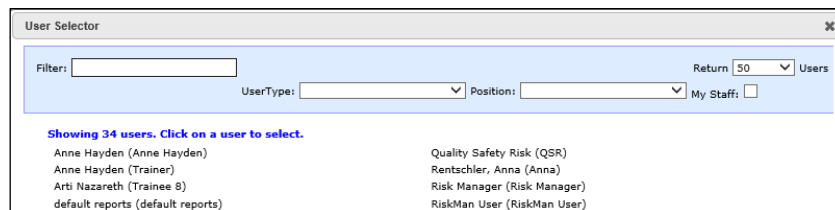
Dates greater than 10 years in the future can be entered manually by typing them into the field.



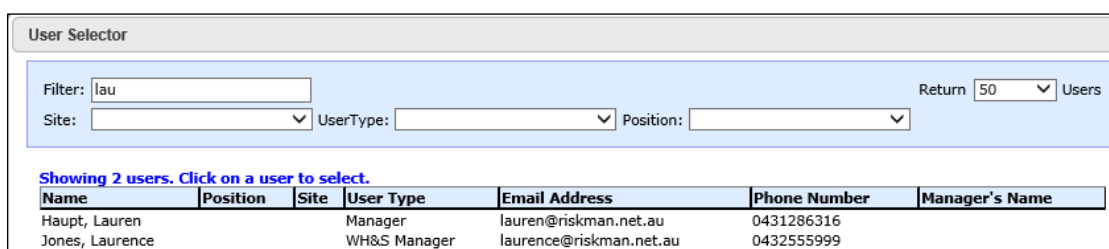
Custom User Selection

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

You're now able to customise the user selection list to display different user details. Previously, the only detail displayed would be the user display name and username.



The decision on what details are displayed is up to you. Details from the user profile can be displayed such as: Position, User Type, Email address, Phone number and / or Manager



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

Administration > 100) Use custom user selector?

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

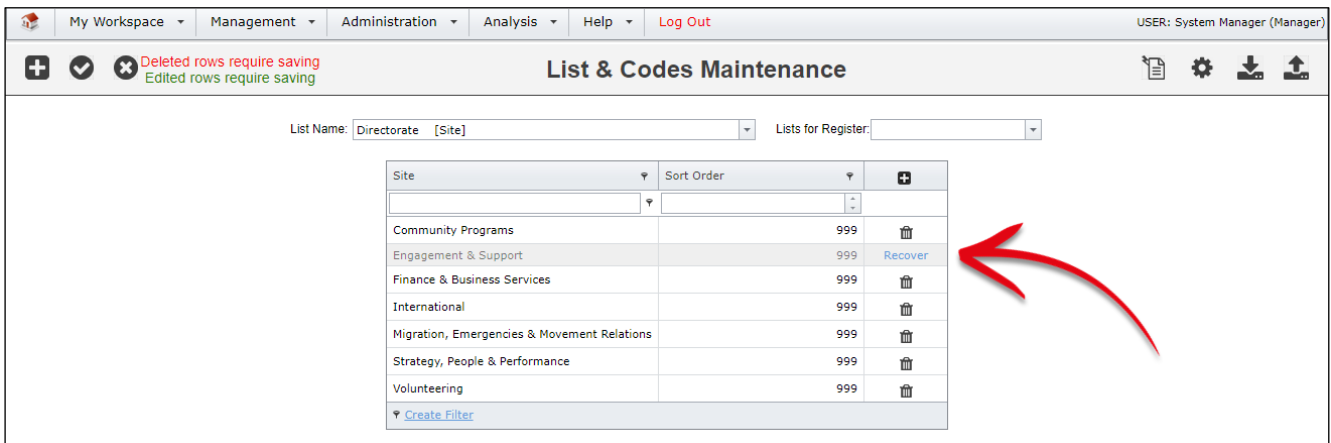
User Selector Display Columns

Note

Changes to the *User Selector Display Columns* via *List and Codes Maintenance* required an access code to manage the list. Please contact us to obtain the code.

List and Code Maintenance: Recover feature

The recover button allows you to “restore” a deleted value within a list while you are editing it:



You will still be required to accept or discard the changes for the changes to be applied.

System Changes

The following changes relate to administrative functionality in the system.

Comprehensive Custom Report Setting

- **Limits the number of records to be retrieved whilst running comprehensive custom reports**

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

The Comprehensive Custom Report is designed to present a printable representation of the actual form and obeys rules for display or otherwise parts of the form on a field by field basis, and processes each record independently.

When this report is run there is a considerable processing overhead. The number of records that can successfully be processed varies based on the configuration of the register and the hardware that the system is running on.

Running a report with an excessively large number of records can adversely affect system performance for other users in extreme cases. This setting limits the maximum number of records that can be requested at a time to prevent this situation, by selecting only the first specified number of records. A suggested starting limit could be 100, but this could be adjusted based on actual test results. A value of 0 disables limits.

New Global Settings

The following Global Settings have been added:

Reports > 200) Maximum records to display when producing a report based on the Comprehensive Custom Report

User Name Display

- **Define how a user's name is appears when a user is logged into RiskMan**

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

You can now define how a name should be displayed when the user is logged in. This will also represent the display in the review history or where any electronic footprint is displayed.

Options for display are:

User Display Name	USER: Lauren HAUPT
User Display Name (User Name)	USER: Lauren HAUPT (Lauren Haupt)
User Display Name (User Type)	USER: Lauren HAUPT (Client Mgt Team)
User Name	USER: lhaupt
User Name (User Display Name)	USER: lhaupt (Lauren Haupt)

New Global Settings

The following Global Settings have been added:

Item Entry Defaults > Form Options > 40) Username display style.

List Page: Limit Records Per Page

- **Set the maximum number of records to be able to be displayed per list page e.g. Inbox**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Allowing very large numbers of rows in List Pages can cause possible performance issues. The time taken to retrieve the rows can vary dramatically depending upon the selected columns shown and the general configuration of your system, so a practical number suitable for your system should be chosen. If the number is too large and under specific conditions, after a certain amount of time the system may error with a "time out", which is a bad experience for the end user. The maximum number is 500, reducing this return may help avoid possible negative experiences.

New Global Settings

The following Global Settings have been added:

Register Item List > 60) Maximum number of rows allowed in Inbox and other listing pages

Alerts Version 2 Recipients: Deleted or Expired User Profiles

- **Stops alerts triggering and notifying users whose profiles have been deleted or expired**
Significance: ● ○ ○ **Need for training:** ● ○ ○

If this global setting is set to **yes**, RiskMan will not sent alerts to deleted or expired users. When **No**, RiskMan will still alert users marked as deleted or expired. This can be appropriate in some situations. For example, if there are a large number of agency staff who are temporarily expired when not required.

New Global Settings

The following Global Settings have been added:

Alerts > 40) When finding recipients for Alerts Vsn2, don't include Deleted or Expired users.

Alerts Version 2: Periodic Alerts Processing

- **Stops alerts processing too many records at a time**
Significance: ● ○ ○ **Need for training:** ● ○ ○

When processing Periodic Alerts, it is possible to configure an alert so that they return large numbers of records. This can potentially slow your system. Some Alerts may return all records for a register (Think of the System Manager who accesses all records). This could return thousands of records. Assigning or revoking permissions, for example, would take many hours and cause processing issues on normal pages.

'When Saved' alerts will handle this by processing in batches of 500, then allowing alerts to continue, then processing a further 500 in the next run, etc. It will eventually complete after some time. Periodic alerts cannot use this technique.

Having a periodic alert return more than this number of records will cause an error. The alert will then be disabled until the conditions are corrected. Setting "0" means no there is no limit set.

New Global Settings

The following Global Settings have been added:

Alerts > 50) Maximum records when processing Periodic Alerts (Vsn 2)

Alerts Version 2: Maximum Time to Process Alerts

- **Terminate an alert for high run time**
Significance: ● ○ ○ **Need for training:** ● ○ ○

If an alert process for more than the specified number of minutes, an error will be generated and the alert terminated (rolled back). The alert will be disabled until corrected. A notification email will be sent to the nominated "Risk Manager" to advise that the alert has been disabled. Alerts will 'notice' if this changes while the alert is processing, providing a way to terminate a long running alert. Setting "0" means disabled.

New Global Settings

The following Global Settings have been added:

Alerts > 60) Maximum time to allow an individual Alert (Vsn 2) to process

Alerts Version 2: Maximum Time to Allow Alerts to Batch Process

- **Stops alerts processing too many alerts in one batch**
Significance: ● ○ ○ **Need for training:** ● ○ ○

After Alert Vsn2 processing starts, it will process Alert after Alert until it either, encounters an alert it has already processed in this batch, or a time limit is reached. This setting indicates the number of minutes before reaching that time limit. After control is surrendered, emails can be sent and other processes completed, and then Alerts will begin processing again from where they left off.

New Global Settings

The following Global Settings have been added:

Alerts > 70) Maximum time to allow Alerts (Vsn 2) to batch process before surrendering control

Alerts Version 2: Number of Error Log Records to Present

- **Set the maximum number of error logs in alerts logging**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Alerts Vsn2 will log errors for an individual Alert to the Alert Log. The log is limited in how many records it keeps for each log type for each Alert, so that the total number of records is not unreasonable. Records in excess of the specified amount will be deleted, oldest first. The minimum set value is 10.

New Global Settings

The following Global Settings have been added:

Alerts > 80) How many 'Error' log records to keep per Alert V2

Note

This global setting will be applied to ALL alerts in your system. You're able to limit error logs for individual alerts and not all via List and Code Maintenance. List Name: (Alerts) Vsn 2 Custom Log Settings

Alerts Version 2: Number of Records Found Log to Present

- **Set the maximum number of “records found” logs in alerts logging**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Alerts Vsn2 will log details to the Alert Log when it 'finds records' to process for an individual Alert. The log is limited in how many records it keeps for each log type for each Alert, so that the total number of records is not unreasonable. Records in excess of the specified amount will be deleted, oldest first. The minimum set value is 10.

New Global Settings

The following Global Settings have been added:

Alerts > 90) How many 'Records Found' log records to keep per Alert V2

Note

This global setting will be applied to ALL alerts in your system. You're able to limit record found logs for individual alerts and not all via List and Code Maintenance. List Name: (Alerts) Vsn 2 Custom Log Settings

Alerts Version 2: Number of “Process Complete” Log to Present

- **Number of process complete entries found in an Alert log**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Alerts Vsn2 will log details to the Alert Log when it completes a processing run without finding matching records for an individual Alert. The log is limited in how many records it keeps for each log type for each Alert, so that the total number of records is not unreasonable. Records in excess of the specified amount will be deleted, oldest first. The minimum set value is 10.

New Global Settings

The following Global Settings have been added:

Alerts > 100) How many 'Process Complete' log records to keep per Alert V2

Note

This global setting will be applied to ALL alerts in your system. You're able to limit process complete logs for individual alerts and not all via List and Code Maintenance. List Name: (Alerts) Vsn 2 Custom Log Settings

Alerts Version 2: Number of "Digest Complete" Log to Present

- **Number of digest complete entries found in an Alert log**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Alerts Vsn2 will log details to the Alert Log when it completes processing a Digest Alert. The log is limited in how many records it keeps for each log type for each Alert, so that the total number of records is not unreasonable.

Records in excess of the specified amount will be deleted, oldest first. The minimum set value is 10. Remembering that not all Alerts generate a Digest.

New Global Settings

The following Global Settings have been added:

Alerts > 110) How many 'Digest Complete' log records to keep per Alert V2

Note

This global setting will be applied to ALL alerts in your system. You're able to limit digest complete logs for individual alerts and not all via List and Code Maintenance. List Name: (Alerts) Vsn 2 Custom Log Settings

Alerts Version 2: Set How Many Rows Allowed in a Digest Alert

- **Number of rows (records) a digest alert may process at any one time**
Significance: ● ○ ○ **Need for training:** ● ○ ○

When running a Periodic Alert, it is possible to return a large number of rows. When the Alert utilises a Digest email, each row requires separate processing and cumulatively this could take a very long time. This could adversely affect normal system operations. To prevent this situation, this setting then places a limit to the number of rows allowed for a Periodic Digest Alert. An error will be generated if the retrieved number of rows exceeds this value. A notification email will be sent to the nominated "Risk Manager" to advise of the maximum number has been reached. Alert settings, e.g. number and type of recipients, will affect how long an alert takes to process. Please keep this in mind, and run tests, before increasing this limit. Consider scheduling alerts out of peak system times would allow some leeway in processing times.

New Global Settings

The following Global Settings have been added:

Alerts > 120) The maximum number of retrieved rows allowed in a Periodic Digest Alert

Reports Version 2: Limit the number of folders per structure in Reports Library Vsn 2 and My Reports Vsn 2

- **Set a limit to how many sub folders a user can add**
Significance: ● ○ ○ **Need for training:** ● ○ ○

This setting controls how many levels of sub folders may be created in the Report Library and My Reports. Setting this to 1 means that users are able to create folders, but those folders cannot have sub folders created within them.

Please Note: Changing this setting to a value lower than the current value can result in inconsistent behaviour in the system as well as potential loss of data. Please contact RiskMan support if you want to change this value to one lower than what is currently set.

New Global Settings

The following Global Settings have been added:

Reports > 220) What is the maximum number of folder levels allowed in the My Reports / Report Library structure?

Journals: Allow Editing of Date and Time Stamp

- **Ability to control whether users are able to edit date and time stamps in Journals**
Significance: ● ○ ○ **Need for training:** ● ○ ○

If the global setting is set to **No**, it will disable the ability to make changes to the date and time fields on Journal Entry page. These fields will be grey indicating it is not an editable field. Setting it to **Yes** will allow the user to change the date and time fields. The fields will be yellow, indicating fields are mandatory and are required to be completed.

New Global Settings

The following Global Settings have been added:

Item Entry Defaults > Journals > 50) Allow users to change Date and Time Stamp on Journals

LDAP: Automatic Update of User Details

- **Users details are to automatically update upon login to RiskMan**
Significance: ● ○ ○ **Need for training:** ● ○ ○

When **yes** is selected, a user's details will be retrieved from the LDAP server and their RiskMan user profile will be updated when they login. Provided the fields are configured in LDAP, updates will be made to User Display Name, Email Address, Phone number and Mobile Number. When this setting is yes, these fields will be read only in the User Profile page (for LDAP accounts), since changes made manually would be ineffective as they would be overwritten.

New Global Settings

The following Global Settings have been added:

Users > User Control > 150) Update user details whenever a user logs in.

Authenticate Users Against a SAML2 Identity Provider

- **RiskMan now supports authenticating users against a SAML2 identity provider**
Significance: ● ○ ○ **Need for training:** ● ○ ○

Please contact RiskMan if your organisation is interested in utilising this functionality.