RISKMAN QUICK REFERENCE GUIDE TO SYSTEM CONFIGURATION & TOOLS

Introduction

This reference guide is aimed at RiskMan Administrators who will be responsible for maintaining your RiskMan system configuration and also to use some of the System Tools that are available in RiskMan. The descriptions and locations of each of the Global Settings can be located in the **Global Settings Descriptions Guide** accessible from the *Help -> Reference Guides*

What do the System Configurations entail?

The System Configurations affect the overall operation of RiskMan. These settings include

1. **Global Settings** - settings for all aspects of RiskMan (except Feedback). Some of these settings include
    - Colour Schemes
    - Naming Conventions for the Global fields used within the Registers
    - Default settings for the way fields appear e.g. Yes/No fields are displayed as radio buttons, lists or checkboxes; Date/time fields are drop down fields or free text; Organisation name which will appear on reports
    - Register Report output defaults e.g. PDF, Word™
    - Scheduling for your email notifications and alerts
    - Mail setup for your emails
    - Setup to link network logins to RiskMan (LDAP)
    - Register specific settings
2. **Feedback Global Settings** - settings that are specific to the Feedback Register

    Note: *These settings will be incorporated into the Global Settings in a future release*
3. Text editing tool for the front-page text
4. Licensing Details
5. Grid Defaults for Register Listing pages
6. Columns to display in the **Find Related Incidents** list for linking incidents to Feedback notifications
7. LDAP testing
8. Email Log
9. Attach Document Settings

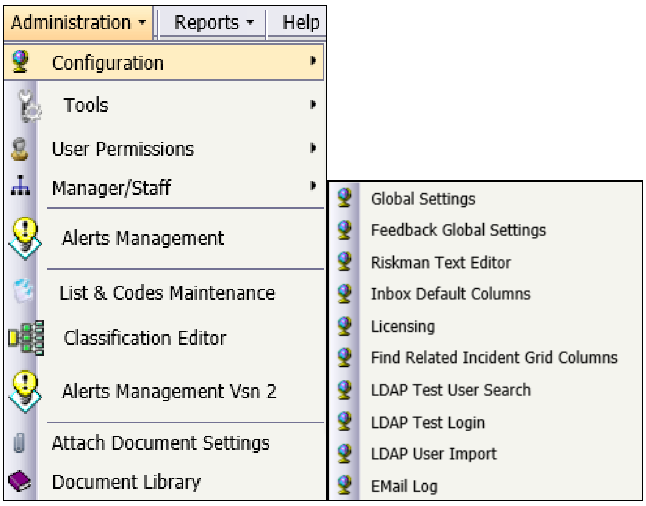
What user permissions do I need to access the System Configurations?

For a user to have permission to the Configuration Modules including the Global Settings, they will need the following **Administrative Permission** under the **General** tab

- **Can modify Global Settings**

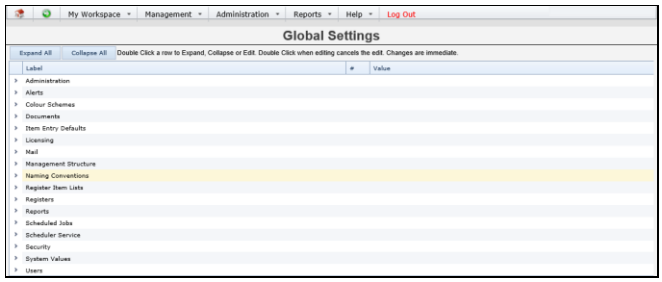
How do I access the Configuration modules?

1. From the menu select *Administration -> Configuration*



Global Settings

To access the Global Settings for all aspects of RiskMan __except__ Feedback, select from the menu *Administration -> Configuration -> Global Settings*

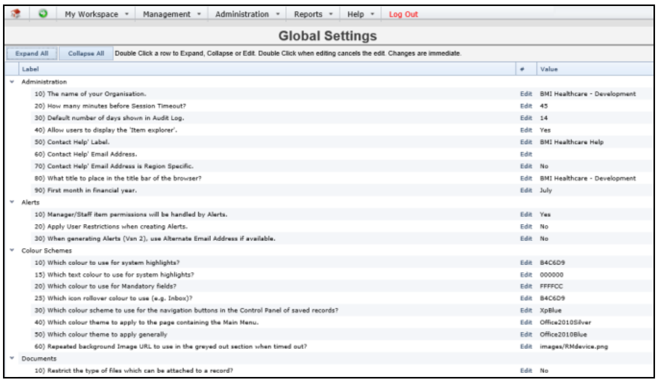


These settings are grouped under logical headings. Some settings will be Register specific e.g. Quality, Risk Register, Incidents, Feedback and will appear in the **Registers** grouping.

Some general settings can also appear under a Register specific setting. If this is the case, the Register setting will take priority for that Register. For example, the **40) Enable Link (Multi-Person) entries** setting can be setup as a Register specific setting if Linked Items is only to be active for the Incident & Risk Registers but not for any other Register

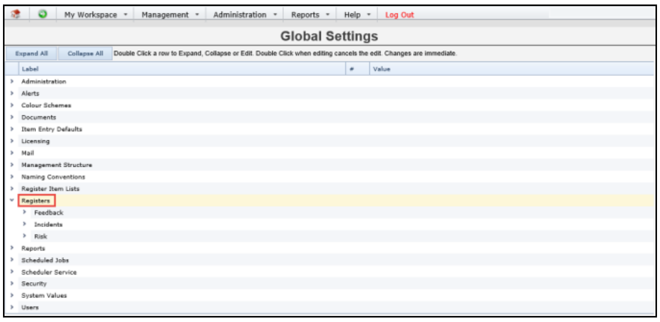
1. To view specific settings under a Grouping click on the respective **Expand** “>” icon

2. To view settings under all Groupings click on the **Expand All** button



***Example:** Sample of the Global Settings*

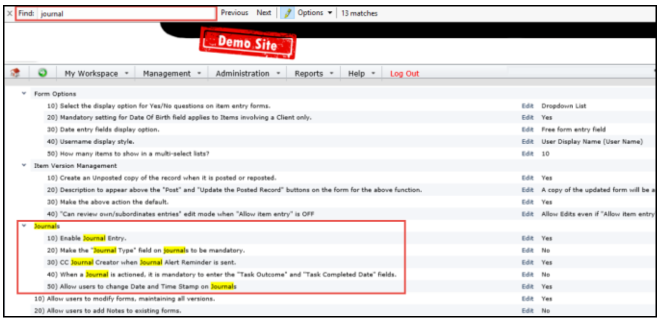
3. The Settings specific to a Register e.g. Quality, Risk Register, Incidents, will appear under the **Registers** grouping



***Example:** Register specific settings*

Can I search for a Setting?

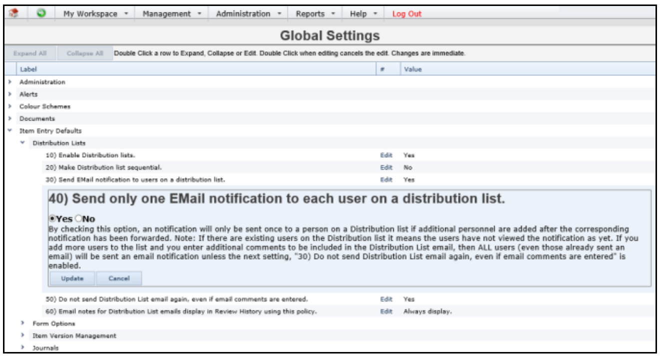
1. Press the **Expand All** button to expand the settings
2. Press **CTRL F** to display the **Find** ❶ field in your Internet Explorer
3. Enter your search word and RiskMan will highlight the settings that contain that word ❷



***Example:** Using the Find field to search for Global Settings that contains the word "Journal"*

How do I modify a Setting?

1. Locate the setting by expanding the list
2. Double click the setting
    - A description of this setting will also be displayed



3. Modify the setting as required e.g. select Yes/No; select an item from a list
4. Press the **Update** button if you wish to save your modification, otherwise press **Cancel**

How do I create a Register Specific Global Setting?

Some of the Global Settings affect all Registers E.g. ***Enable Link (Multi-Person) entries*** and some settings are specific to only one Register E.g. ***Risk Register Risk Matrix display style*** which is located under the **Register | Risk Register** Global settings list and only relevant to the Risk Register

However, if you would like a Global Setting to also be Register specific because you would like a different state of that setting in a particular Register, you can make a Register Specific Version

1. To create a register specific setting, double click the setting
2. Press the **Make Register Specific Version** ❶ button

3. In the pop-up window
   - Select the Register ❷ to add this setting to
   - Modify the **Help** ❸ text if required
   - Press **Save or Discard** ❹

4. The setting will appear under the specific Register Name under the ***Register*** grouping.
5. Locate the new setting under the specific Register folder and modify as required
6. RiskMan will use the Register specific setting rather than the Global Setting

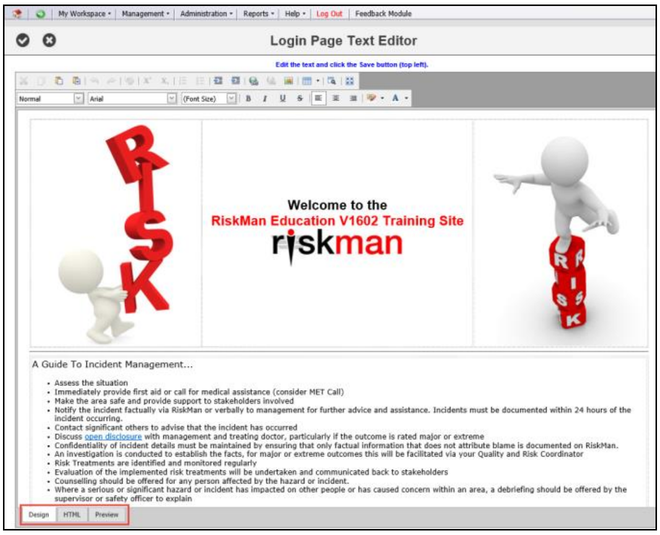
RiskMan Text Editor

This option allows you to configure the front-page text.

1. To access this page, select *Administration -> Configuration -> RiskMan Text Editor*
2. Press the **Edit** button next to the **Edit the Login Page Text** option

Note:** The Acknowledgement page that can appear after an incident is submitted and before you get to the Confirmation page is normally turned off. If you wish to know more about this page refer to the **RiskMan System Configuration & Tools Description Guide

3. The **Design** mode allows you to edit the text on the front page
4. The **HTML** mode allows you to apply more advanced styles for your front page as well as incorporating logos and pictures. Knowledge of HTML is required
5. Modify the text and layout as required and press the **Save** icon



***Note:** If you want to be able to edit text on other pages within RiskMan e.g. The Create New Login page refer to **Text Editor Tool** under the **Administration -> Tools** menu*

Setting the Default Grid Layouts for Register Listing Pages

This setting allows you to set the default grid layouts of your Register listing pages e.g. Incident Inbox, Entered Incidents, Posted Incidents, Entered Activities, Entered Risks etc

***Note:** This option is **not** available for Feedback Listing pages in this version*

The grid layout consists of the columns that are displayed on each of the listing pages and also the column widths

When an Administrator, the person who has the **Administrative permission: Can modify Global Settings,** configures all the listing pages under their login, they can set all other user's listing pages to match - provided the user has never made changes to these listings

1. Under the Administrator's login, configure the columns and column widths for all the Register specific listing pages
2. From the menu, select *Administration -> Configuration -> Inbox Default Columns*

3. Highlight the Registers ❶ that you wish to update - (*you can highlight more than one by holding your CTRL key and clicking on the respective Registers in the list)*
4. Press **Save the Grid Defaults** ❷

5. Only listing pages that a user has not modified i.e. changed the columns and/or column widths, will have their respective listing pages updated

Adding or Updating your RiskMan Licence

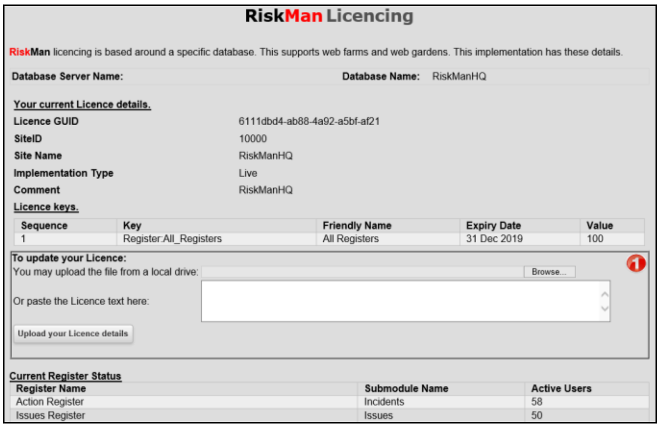
All organisations hosting their own RiskMan will require a **Licence Key**. The licence key will be dependent on your RiskMan licence agreement with RiskMan International Pty Ltd. Each licence key will have an expiry date and once the licence key is expired or about to expire, a new licence key will need to be obtained. An expired licence will result in the inability to create users in the User Profiles – all other aspects of RiskMan will still be functional. Once you have applied for a licence, a licence key will be forwarded to you in a file which will need to be uploaded into RiskMan via the Licensing page

To access the Licensing Page

1. From the menu, select *Administration -> Configuration -> Licensing*
2. To obtain a licence, you will need to contact support who will send a licence key support@riskman.net.au
    - When the licence key is forwarded to you, save it locally

There are two ways to upload your new licence details.

Either upload the licence key file sent from support or copy and paste the contents from that same file ❶



LDAP Testing

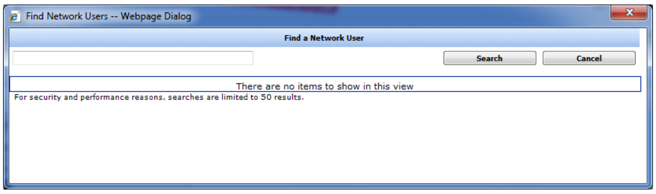
If your IT Department has configured RiskMan to use organisational Network Login accounts, there are 3 LDAP Configuration options that you can use to

- Search for a user to see if they have a network account
- Test that the LDAP configuration is working from RiskMan to your Network accounts
- Import User Profiles on your Network into RiskMan

***Note:** This option is **only** accessible via an authentication code and would be used in conjunction with your IT Department & RiskMan Support when the LDAP configuration is first setup. It would **not** be used for an established RiskMan LDAP configuration*

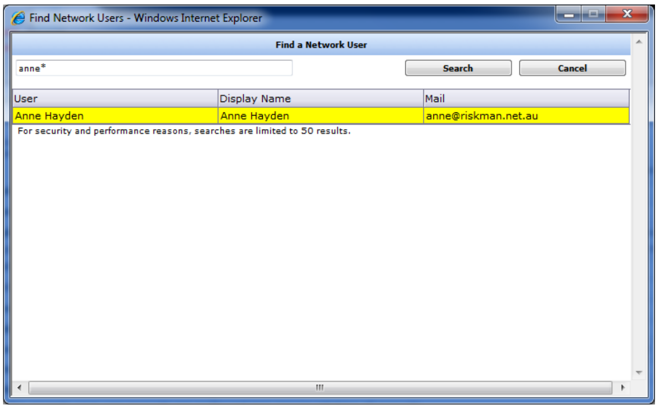
To test searching for a user on your network to ensure the LDAP configuration has been setup correctly

1. From the menu select *Administration -> Configuration -> LDAP Test User Search*



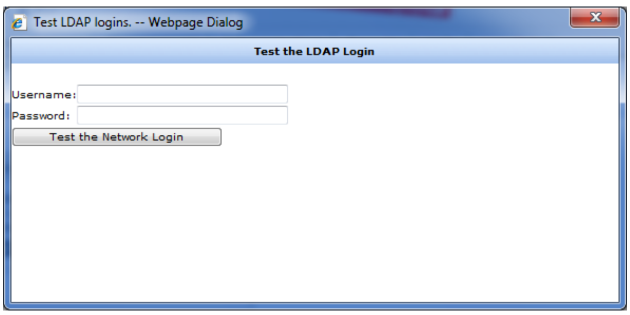
2. Enter your search criteria and press **Search**

***Note:** The way you search for users will depend on how your IT Dept has setup the search string. Not all search strings are the same. An * acts like a wildcard e.g. Anne* will search for all users whose name starts with "Anne"*

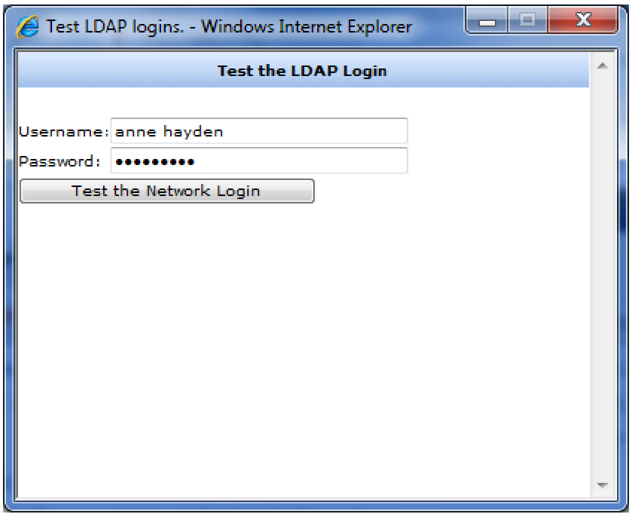


To test the connection between RiskMan and your Network logins

1. From the menu select *Administration -> Configuration -> LDAP Test Login*

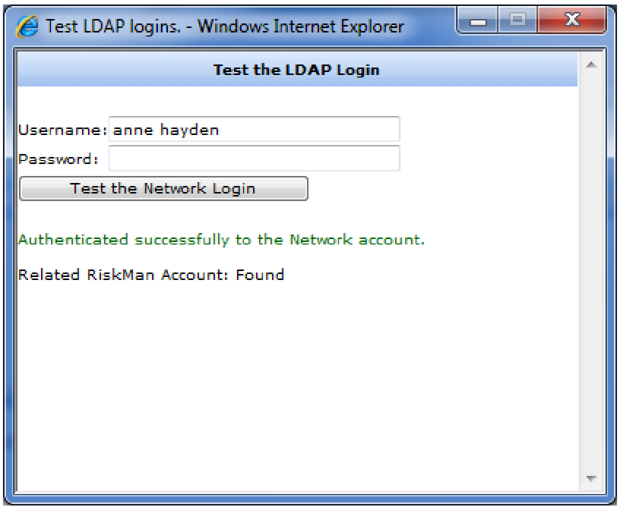


2. Enter your **Network Username** and **Password**



3. Press **Test the Network Login button**

    - A message will appear if you are successful or not. If you are not successful you may need to consult your IT Department or RiskMan Support - support@riskman.net.au



Email Log

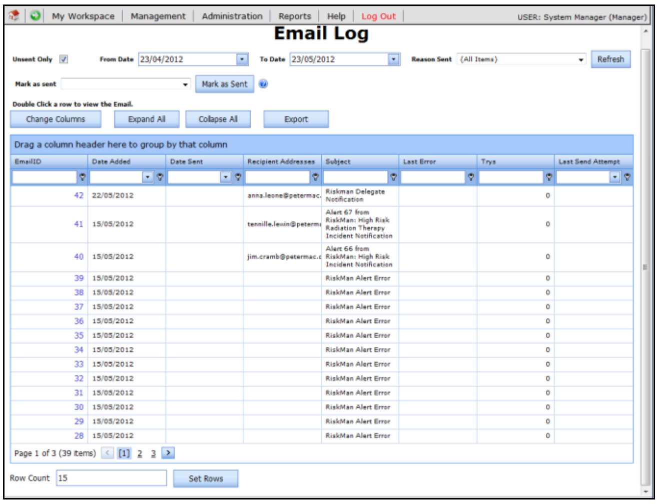
All emails that are sent from RiskMan are logged into the database. The Email Log page allows Administrators to review the email logs to ascertain if emails are being sent or not. This is useful

- If you are investigating why users may not be receiving email notifications i.e. incorrect email address; mail server has changed and is not updated in your Global Settings; emails have stopped being sent from RiskMan
- Tracking emails that have been sent to a particular user

To access the Email Log

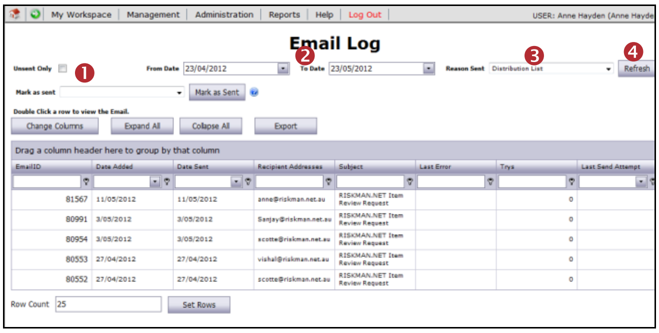
1. From the menu select *Administration -> Configuration -> Email Log*

    - By default a list of **unsent** emails will be displayed



2. If you want to view all emails that have been sent

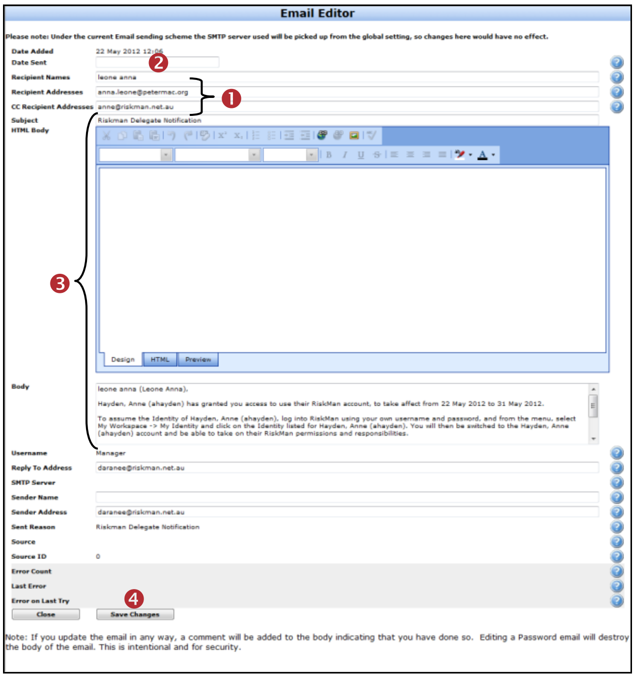
    - Uncheck **"Unsent Only"** ❶
    - Modify the **Date Range** ❷ (when the email was logged to be sent)
    - Filter the type of emails that you wish to preview from the **Reason Sent** ❸ field e.g. Alerts, Distribution Lists
    - Press **Refresh** ❹



***Example:** This list shows all the Distribution List emails that have been sent in the last month*

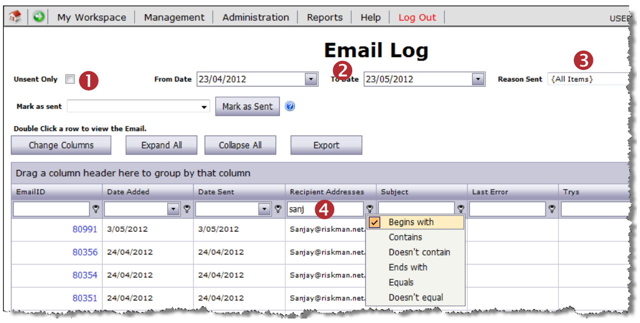
3. To open an email click on the **Email ID** link in the list

    - If the email address of the person who is to receive the email is incorrect, change the email address in the **Recipient Addresses** and/or **CC Recipient Addresses** field ❶
    - If the **Date Sent** ❷ field is not empty, clear the content of this field
    - Other changes can be made to the email, e.g. email subject, email body ❸
    - Press **Save Changes** ❹ at the bottom of the email
    - The email will be re-sent when the next email scheduling cycle begins on your RiskMan



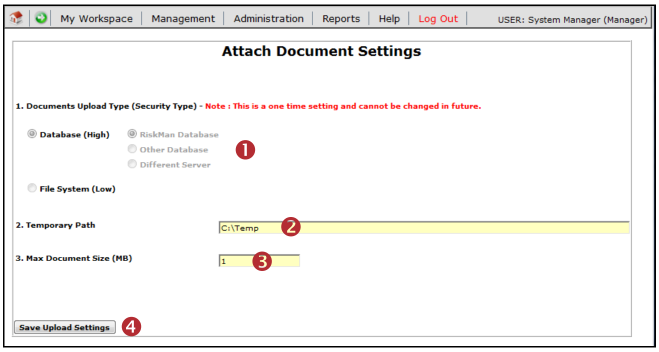
4. If you want to search for emails sent to a user

   - Ensure you have **Unsent Email** ❶ unchecked - so you are displaying the Sent Email
   - Enter the **date range** ❷ when the emails were sent
   - Ensure **Reason Sent = All Items** ❸
   - Filter the **Recipient Addresses** ❹ field by entering the first part of the user's email address *(as in the example below)*. The system will automatically filter once you have entered your filter criteria



Attach Document Settings

To be able to attach a document to a notification/activity/ item you need to ensure you have specified the Attach Document Settings. These are accessible under the *Administration -> Attach Document Settings* page



❶ Specify where the document files will be stored - **Database** (high security option) or **File System** (low security option). If you select

- **RiskMan Database:** The files will be stored in the RiskMan Database – *This is the recommend option*
- **Other Database:** Files are stored in another sequel database but on the same server as the RiskMan database. If this option is selected enter the name of the database
- **Different Server:** Files are stored in another sequel database but on a different server to that of the RiskMan database. If this option is selected please contact RiskMan Support - support@riskman.net.au

- **File System:** Files are stored in folders in a central location. If this option is selected, enter the path of where the files will be stored.

  Note: *It is recommended that this be a folder on the RiskMan Web Server but not inside any Web Sites as the files could be exposed through the website*

❷ **Temporary Path:** All files uploaded or downloaded in an Internet environment must be saved to a temporary file location before being saved to the destination location. For this reason it is necessary to enter the path e.g. **c:\Temp** where these files will be stored temporarily - this path can be changed at any time

❸ **Max Document Size (MB):** Specify the maximum size of the documents that can be attached to a notification/item/ activity - this file size can be changed at any time

❹: To save your settings, press **Save Upload Settings**

System Tools

The **Tools** options available under the *Administration -> Tools* menu provides other system related functions which can either be

- Accessible to your RiskMan Administrator; or

- Accessible via an authentication code provided by RiskMan Support and possibly only used by or in conjunction with RiskMan support

The Tools menu option is only available to users with the following **Administrative Permission** under the **General** tab

- **Can modify Global Settings**

As some Tools can only be used in conjunction with RiskMan Support; the contact details are **support@riskman.net.au** or +61 3 9686 0009

List Structure Editor

This option provides access to the Administration Lists that are normally hidden under the List & Codes Maintenance list.

This page is only accessible via an authentication code.

It allows RiskMan Support to make changes to your System's setup that are not accessible to RiskMan clients but are used in conjunction with requests from clients; for example:

- **Audit Log Settings:** Defines the logging of specified events in the RiskMan system. The logging of Assign and Unassign Manager is often enabled at customer sites
- **LDAP Multiple sites:** Defines multiple LDAP servers if required in an alliance, and when enabled users must select the server/domain they wish to use
- **My Home Page Items:** Defines all of the items which can be displayed on the Home Page
- **Auto Post Incident Rules:** Defines the conditions under which incidents should be automatically posted
- **Auto Post Feedback Rules:** Defines the conditions under which feedback should be automatically posted

Note: *If you wish to know more about the Admin lists please contact RiskMan Support - support@riskman.net.au*

Menu Editor

This option provides access to the RiskMan menus e.g. My Workspace, Management, Administration, Reports, Help

This page is only accessible via an authentication code

It allows RiskMan Support to modify, move or include additional menu items in your RiskMan e.g. Menu items that might point to your own user documentation

Data Tool

This option allows scripts to be run against your database and also to extract data from your database.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support

Script Tool

This option allows extraction of data from specified tables in your database e.g. template information; datasets; lists; front page text.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support to extract specific data from your RiskMan database that may need to be updated into our respective RiskMan model site when enhancements have been requested; or copy data from your Training/Live database to your Live/Training database

Audit Log

The Audit Log allows you to view changes that have been made to specific parts of your RiskMan e.g. Assign a Manager, Unassign a Manager; Login Failed; Login Success; Account update to LDAP; Changes to labels on the Register Entry Forms and other events.

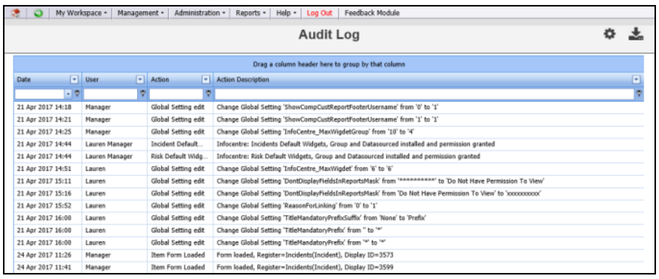
Auditing can be turned on or off with the assistance of RiskMan Support

Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of Audit Log entries* to set automatic purging once each respective record type reaches a certain age.

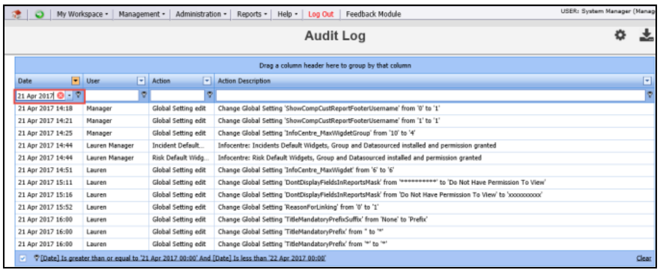
Example: *List of items that are audited in RiskMan*

To filter your Audit List

- Modify the date range (refer to the RiskMan List Page Configuration Guide)
- Select a specific **Action** from the list



- Press **enter** to update the list



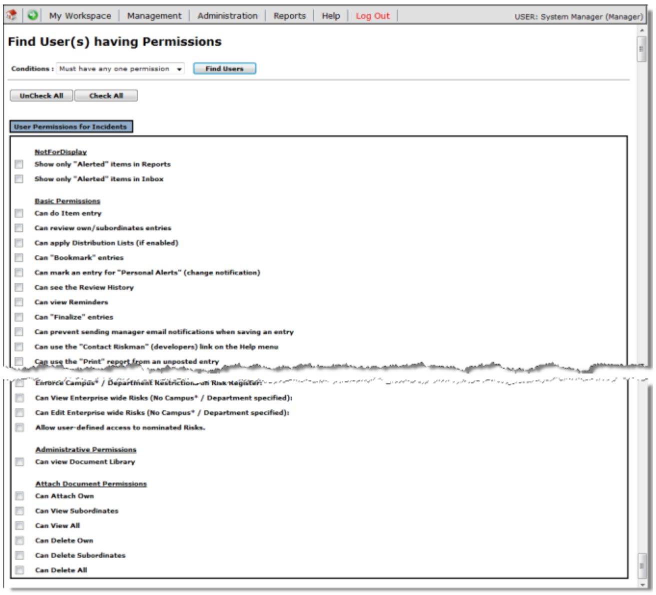
***Example:** List of all events for a specific date*

Find User Tool

This tool allows you to locate all users who have a set of permissions on RiskMan e.g. you may want to know all the users who have access to the Incident Inbox or the Risk Reports

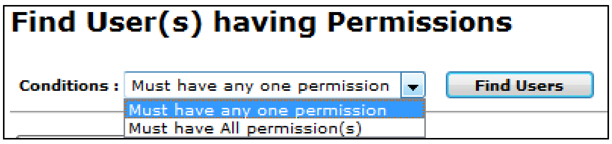
Navigate to *Administration > Tools > Find User Tool*

***Note:** This page has not been completely updated to reflect all the changes to the permissions so may not work for all permissions*

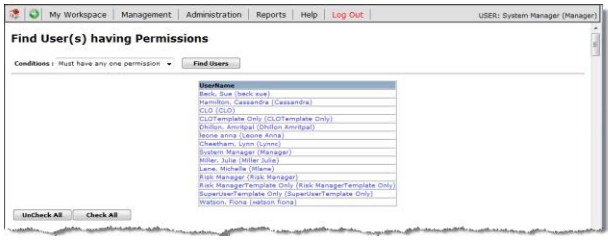


To search for users with particular access to RiskMan

1. In the **Conditions** list select whether the users need to have one of the selected permissions or all the selected permissions



2. Check the respective user permission/s
3. Press **Find Users**
4. A list of users matching the selected user permission/s will display



***Example:** List of Users who have access to the Feedback Inbox*

Grant Admin Permissions

This option grants a user access to all the Administrative permissions where that user's Administrative permissions have been removed inadvertently; or remove any Specific/Restriction Details that have been set against an Administrative User e.g. Site/Location restrictions

Navigate to *Administration > Tools > Grant Admin Tool*

This page is only accessible via an authentication code.

It is used in conjunction with RiskMan Support

Email Log

Emails generated from RiskMan are stored in an Email Log.

(Refer to the RiskMan Email Log Guide)

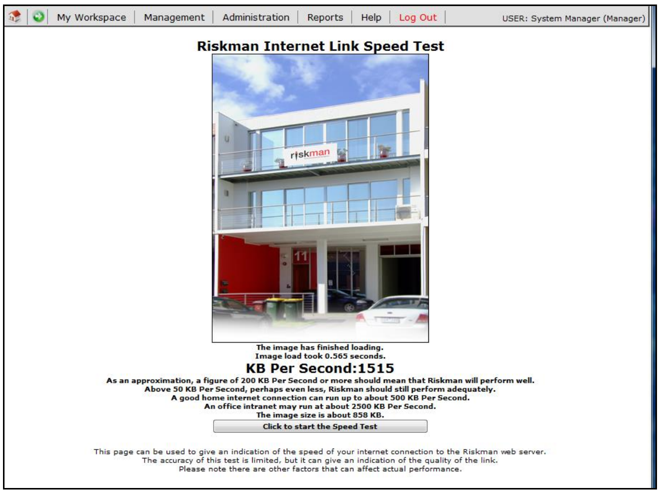
The Email Log allows you to view sent and unsent emails via RiskMan to be able to identify issues. Email could be generated from Alerts, Delegation, Distribution Lists and Broadcast Emails as an example.

Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of email entries* to set automatic purging once each respective record type reaches a certain age.

Speed Test

This page tests the Internet speed to the RiskMan system you currently have open

Press the **Click to Start the Speed Test button**

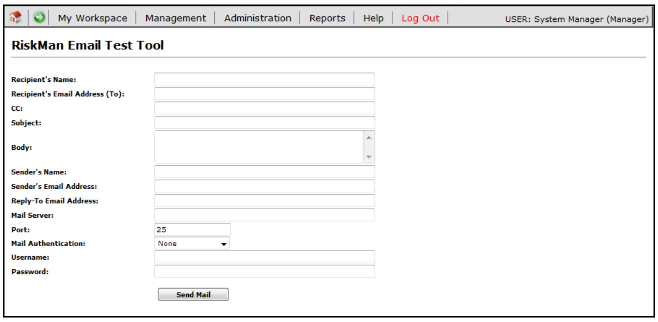


Details on acceptable speeds will appear under the speed of your Internet. If you have concerns relating to the speed of your Internet Explorer/Network contact your IT Dept

Email Test

This option allows you to test that emails are being sent from RiskMan

If you have mail setup on your RiskMan the following fields will be prefilled; Sender's Name; Senders Email Address; Reply-To Email Address; Mail Server; Port

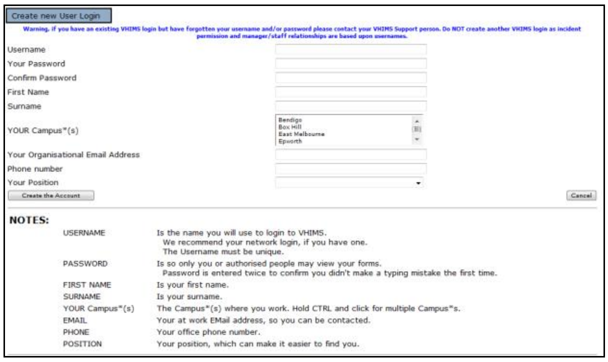


1. Fill in the **name** and **email address** of the **recipient** *(you may want to enter your own details so you can check if the email was sent)*
2. Enter an **email subject** and **email body**
3. A **username** and **password** maybe required before sending the email but in most cases this will not be required
4. Press **Send Email**

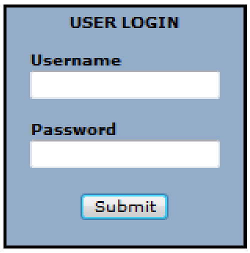
Text Editor Tool

This tool enables you to change the text on some of the pages on RiskMan. Examples include:

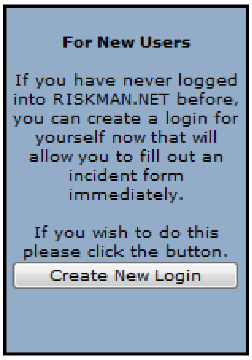
- Front Page text - this can also be changed from *Administration -> Configuration -> RiskMan Text Editor*
- **"Create New User Login"** page



- **"User Login"** section on the front page

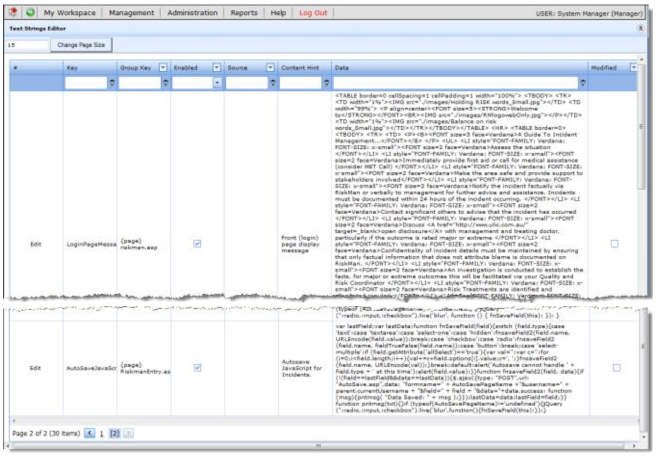


- **"For New Users"** section on the front page

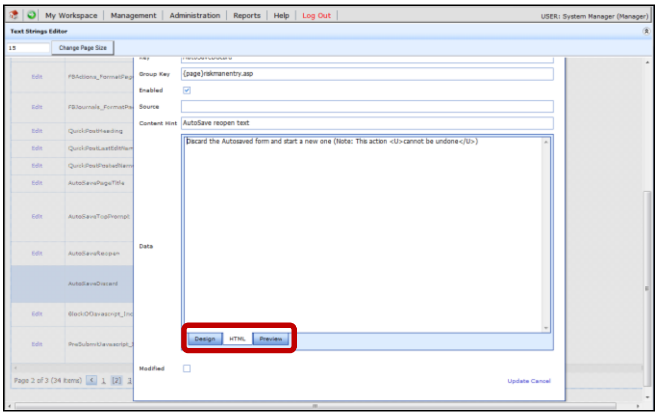


To access the Text Editor Tool

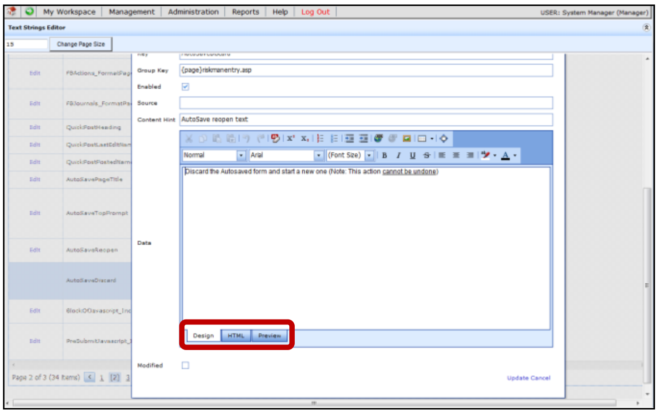
1. Select *Administration -> Tools -> Text Editor Tool*



2. Next to the text that you wish to change press the **Edit** button



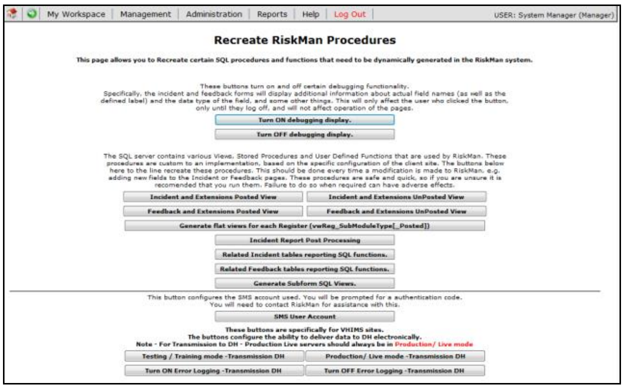
3. The text will be displayed in HTML mode by default. Press the **Design**" button at the bottom of the page
4. Modify the text and press **Update**



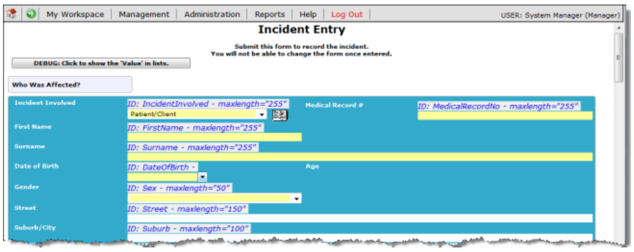
Note: *If there are sections of your RiskMan that you would like text changed but you are unable to find the section in the Text editor Tool contact RiskMan support -* *support@riskman.net.au*

Recreate RiskMan Procedures

This page allows you to recreate certain SQL procedures and functions that need to be dynamically generated in the RiskMan system. If procedures need to be recreated you will be directed by RiskMan Support

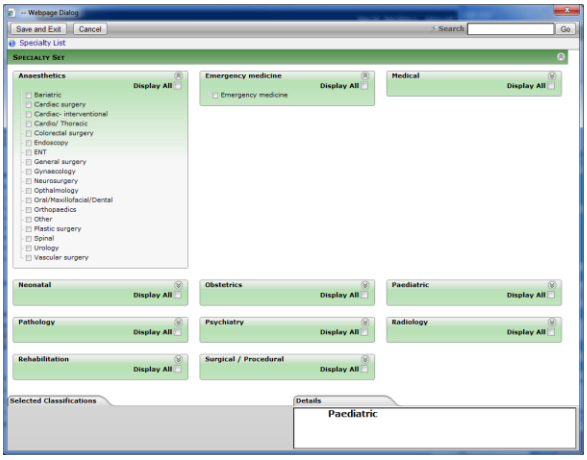


It also allows you to turn on debugging which will show you the database field names that are used on the Register forms *(refer to example below).* This can be used by RiskMan Support to troubleshoot issues that may arise or when enhancements have been requested



Classification Editor

This tool is used by RiskMan Support & Clients to add, edit or delete classifications that are used in the newer style Classification Multiple Selectors *(refer to example below)*.



In most organisations the **Classification Editor** and **Quality Activity Classification Editor** available under the Administration menu, is used to maintain your Incident and Quality Activity Classifications respectively.

This page is only accessible via an authentication code

Note: *If you are using the newer style Classification Multiple Selectors and you wish to be able to edit, delete or modify a classification please contact RiskMan support - support@riskman.net.au*

Indicator Maintenance

This page accesses the queries behind the Indicator sets

This page is only accessible via an authentication code

It is used by RiskMan Support when trouble shooting Indicators

Code Maintenance for Large Lists

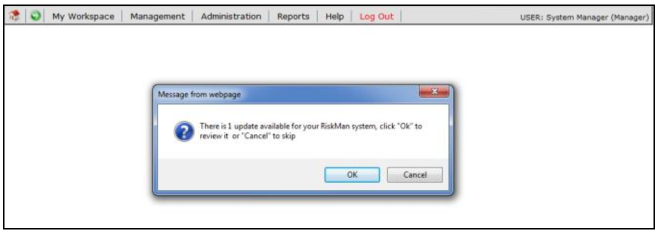
If your organisation experiences delays when opening up specific lists because they are large e.g. Site/Location list, an alternative list page to the List & Codes Maintenance is available - **Code Maintenance for Large Lists.**

This page contains all the same lists as the standard **List & Codes Maintenance** page but enables Administrators to manage these large lists more efficiently.

Note: *Refer to the* ***RiskMan Managing Lists & Codes Guide*** *for more information. The permission to this menu item can be changed and the menu item itself can be moved to appear under or above the List & Codes Maintenance menu, by contacting RiskMan Support*

Auto-Update List

This page displays the list of updates that have not been applied to your RiskMan system. These updates are fixes/changes that have been done by RiskMan that may affect your system. On logging onto RiskMan, a RiskMan Administrator would automatically see these updates. If they choose not to proceed with the updates, they will still be available to update at a later stage on this page



Example: *The message a RiskMan Administrator receives if there is an update to RiskMan. If the user presses* ***OK*** *a list of new and old updates that have already been applied to that version will appear. This list can also be viewed from the Auto-Update page*

To apply the updates manually

1. Select *Tools -> Auto-Update List*
2. Press the **Apply Update** button