## **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

Administration - Reports - He	elp		
Configuration	•		
🇞 Tools	,		
S User Permissions	•		
A Manager/Staff	•	<b>9</b>	Global Settings
Alerts Management		9	Feedback Global Settings
×		9	Riskman Text Editor
List & Codes Maintenance		<b>9</b>	Inbox Default Columns
Classification Editor		9	Licensing
Classification Editor		2	Find Related Incident Grid Columns
Ilerts Management Vsn 2		9	LDAP Test User Search
×		9	LDAP Test Login
Attach Document Settings		9	LDAP User Import
🔶 Document Library		9	EMail Log

## **Global Settings**

To access the Global Settings for all aspects of RiskMan <u>except</u> Feedback, select from the menu Administration -> Configuration -> Global Settings

	Global Settings						
1	Expand All Collapse All Double Click a row to Expand, Collapse or Edit. Double Click when editing cance	eis the	e edit. Changes are immediate.				
	Label a		Value				
>	Administration						
>	> Alerts						
>	Colour Schemes						
≻	Documents						
>	Item Entry Defaults						
≥	Licensing						
>	Mail						
>	Management Structure						
>	Naming Conventions						
>	Register Item Lists						
>	Registers						
>	Reports						
>	Scheduled Jobs						
>	Scheduler Service						
>	9 Security						
>	P System Values						
>	> Users						

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

 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

Global Settings Expand Al Collapse All Double Click a row to Expand, Collapse or Edit Double Click when editing cancels the edit Changes are immediate.							
Administration							
10) The name of your Organisation.	Edit	BMI Healthcare - Development					
20) How many minutes before Session Timeout?	Edit	45					
30) Default number of days shown in Audit Log.	Edit	14					
40) Allow users to display the 'Item explorer'.	Edit	Yes					
50) Contact Help' Label.	Edit	BMI Healthcare Help					
60) Contact Help' Email Address.	Edit						
70) Contact Help' Email Address is Region Specific.	Edit	No					
80) What title to place in the title bar of the browser?	Edit	BMI Healthcare - Developmen					
90) First month in financial year.	Edit	July					
Alerts							
10) Manager/Staff item permissions will be handled by Alerts.	Edit	Yes					
20) Apply User Restrictions when creating Alerts.	Edit	No					
30) When generating Alerts (Van 2), use Alternate Email Address if available.	Edit	No					
Colour Schemes							
10) Which colour to use for system highlights?	Edit	84C6D9					
15) Which text colour to use for system highlights?	Edit	000000					
20) Which colour to use for Mandatory fields?	Edit	FFFFCC					
25) Which icon rollover colour to use (e.g. Inbox)?	Edit	B4C6D9					
30) Which colour scheme to use for the navigation buttons in the Control Panel of saved records?	Edit	XpBlue					
40) Which colour theme to apply to the page containing the Main Nenu.	Edit	Office2010Silver					
50) Which colour theme to apply generally	Edit	Office2010Blue					
60) Repeated background Image URL to use in the greyed out section when timed out?	Edit	images/RMdevice.png					
Documents							
103 Restrict the type of files which can be attached to a record?	Ede	No					

#### 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

1	😤 🥥 My Workspace - Management - Administration - Reports - Help - Log Out							
	Global Settings							
5	Expand All Colleges All Double Click a row to Expand, Collapse or Edit. Double Click when editing cancels the edit. Changes are immediate.							
	Label # Value							
>	Administration							
	Alerts							
>	Colour Schemes							
>	Documents							
>	Item Entry Defaults							
>	Ucensing							
>	Mail							
>	Management Structure							
>	Naming Conventions							
>	Register Item Lists							
~	Registers							
	> Feetback							
	> Incidents							
	> Rok							
>	Reports							
>	Scheduled Jobs							
2	Scheduler Service							
Č.	Security System Values							
Ľ.	System values							
,	Users							

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 1** field in your Internet Explorer
- Enter your search word and RiskMan will highlight the settings that contain that word

×	Find	nd: journal Previous Next 📝 Options 🕶 13 matches			
		Demo Site			
_					
ĥ	2	My Workspace * Management * Administration * Reports * Help *	Log Out		
	¥	Form Options			
		10) Select the display option for Yes/No questions on item entry forms.		Edit	Dropdown List
		20) Mandatory setting for Date Of Birth field applies to Items involving a Client only.		Edit	Yes
		30) Date entry fields display option.		Edit	Free form entry field
		40) Username display style.		Edit	User Display Name (User Name)
		50) How many items to show in a multi-select lists?		Edit	10
	٣	Item Version Management			
		10) Create an Unposted copy of the record when it is posted or reposted.		Edit	Yes
		20) Description to appear above the "Post" and "Update the Posted Record" buttons on the form for the a	bove function.	Edit	A copy of the updated form will be a
		30) Make the above action the default.		Edit	Yes
		40) "Can review own/subordinates entries" edit mode when "Allow item entry" is OFF		Edit	Allow Edits even if "Allow item entry
	~	/ Journals			
	I 1	10) Enable Journal Entry.		Edit	Yes
	I 1	20) Make the "Journal Type" field on journals to be mandatory.		Edit	No
	I 1	30) CC Journal Creator when Journal Alert Reminder is sent.		Edit	Yes
	I 1	40) When a Journal is actioned, it is mandatory to enter the "Task Outcome" and "Task Completed Date"	fields.	Edit	No
		50) Allow users to change Date and Time Stamp on Journals		Edit	Yes
	_	10) Allow users to modify forms, maintaining all versions.		Edit	Yes
		20) Allow users to add Notes to existing forms.		Edit	No

**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

		My Workspace * Management * Administration * Reports * Help	- L	og Out				
	Global Settings							
Ex	Expand A8 Collapse A8 Double Click a row to Expand, Collapse or Edit. Double Click when editing cancels the edit. Changes are immediate.							
1	Label			Value				
> 4	Admini	atration						
> /	Alerts							
> 0	Colour	Schemes						
> 0	Docum	ents .						
× 1	item E	ntry Defaults						
	Y Di	stribution Lists						
		10) Enable Distribution lists.	Edit	Yes				
20) Make Distribution list sequential. Edit No				No				
30) Send EMail notification to users on a distribution list. Edit Yes								
40) Send only one EMail notification to each user on a distribution list. *Yes_No by decking his option, an notification will only be sent once to a person on a Distribution list if additional personnel are added after the corresponding notification has been forwarded. Note: If there are existing users on the Distribution list if makes the users have not viewed the notification as yet. By add some users to the list add you enter additional comments to be individed in the Distribution list email. The users (vere those aready sent an analysis) or enter additional comments to be individed in the Distribution list email. And users (vere those aready sent an analysis) or enter additional comments to be individed in the Distribution list email have not users (vere those aready sent an analysis). The destination of the distribution of the distribution list email apain, even if email comments are entered is making.								
50) Do not send Distribution List email again, even if email comments are entered. Edit Yes								
	60) Email notes for Distribution List emails display in Review History using this policy. Edit Always display.							
	> Fo	rm Options						
	> Ite	m Version Management						
	> Journals							

- 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 0 button

Form Options	
10) Select the display option for Yea/No questions on item entry forms. Edit Dropdown List	
20) Mandatory setting for Date Of Birth field applies to Items involving a	Client only.
•Yes No It is likely that this setting will only apply to the Incident register. It is configured as a generic setting to provide a default f	or all registers.
Update Cancel	Make Register Specific Version

- 3. In the pop-up window
  - Select the Register 2 to add this setting to
  - Modify the Help <sup>6</sup> text if required
  - Press Save or Discard 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**

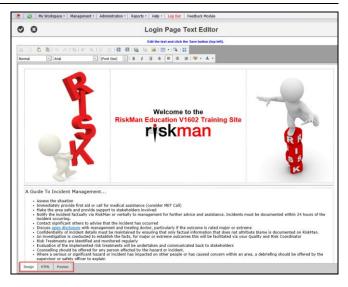
This option allows you to configure the front-page text.

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

1	🕴 🥥 My Workspace   M	anagement Administration Reports Help Log Out USER: System Manager (Manager					
	RiskMan Text Editor						
	Edit	Edit the Login Page Text.					
	Edit	Edit the "Incident Saved" Acknowledgement Message.					
	Edit	Edit the "Incident Saved" Acknowledgement Message.					

**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
- Modify the text and layout as required and press the
   Save or 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 <u>not</u> 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

- 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

🔅 🖸 My Workspace   Management   Administration   Reports   Help   Log Out   USER: System Manager (Manager)						
Set Inbox Grid Column Defaults						
This has been as used to see the Debut Vayou for all of the Od Ishing pages, such as Labor. Danned Thems and software instants of these pages. For the set of the sector of classors, the membered the say to allog to and the for all of the debut set of the set of th						
Once you are happy with your layouts, you can return here and Click the button below. This will take your settings and make them into defaults for new users. Users that have already configured their settings will not be affected. When a user accesses the Orid Listing pages for the first time, they will be presented with the ord in the format you have layed out.						
If these defaults have never been set up, then the user will start with a pre-defined set of columns.						
Registers (Breader Polity Arthury (Breader)						
Save the Grid Defaults						
Incident default last updated en 7 Oct 2009 12:48 by Systam Manager (Manager) Röck default last updated en 14 May 2012 26:12 by (Net Specified)						

- Highlight the Registers 

   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 2

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
- To obtain a licence, you will need to contact support who will send a licence key <u>support@riskman.net.au</u>
  - 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 **0** 

		RiskM	lan Licencing		
RiskMan licencing	is based around a specific	database. This sup	ports web farms and web garden	s. This implementation ha	as these details.
Database Server	Name:		Database Name: Ri	skManHQ	
Your current Lice	ence details.				
Licence GUID		6111dbd4-ab	88-4a92-a5bf-af21		
SiteID		10000			
Site Name		RiskManHQ			
Implementation	Type	Live			
Comment	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	RiskManHQ			
Licence keys.		T G SKITCH T G			
Sequence	Key		Friendly Name	Expiry Date	Value
1	Register:All_Registe	ers	All Registers	31 Dec 2019	100
To update your L You may upload th	licence: he file from a local drive:			Brows	se
Or paste the Licer	nce text here:				0
Upload your Licent	ce details				
Current Register	Status				
Register Name			Submodule Nam		ve Users
Action Register			Incidents	58	
Issues Register					

## 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 <u>only</u> 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 <u>not</u> 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

E Find Network Users Webpage Dialog		×
Find a Network User		
	Search	Cancel
There are no items to show in this view For security and performance reasons, searches are limited to 50 results.		

#### 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"

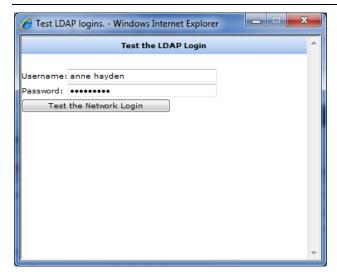
🔗 Find Network Users - Windows Internet Explorer					
	*				
anne*		Search Car	ncel		
User	Display Name	Mail			
Anne Hayden	Anne Hayden	anne@riskman.net.au			
•	m		Þ		

#### To test the connection between RiskMan and your Network logins

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

C Test LDAP logins Webpage Dialog	×
Test the LDAP Login	
Username: Password:	
Test the Network 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 -<u>support@riskman.net.au</u>

🏉 Test LDAP logins Windows Internet Explorer	
Test the LDAP Login	*
Test the LDAP Login         Username: anne hayden         Password:         Test the Network Login         Authenticated successfully to the Network account.         Related RiskMan Account: Found	*
	Ŧ

#### 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

- From the menu select Administration -> Configuration

   -> Email Log
  - By default a list of unsent emails will be displayed

			_		l Log			
Insent Only 😨	From Date 23/	04/2012	-	To Date 23/05/2	• • •	Reason Sent {All	ltems)	<ul> <li>Refresh</li> </ul>
Mark as sent		<ul> <li>Mark a</li> </ul>	as Sent	0				
ouble Click a row to v	ion the Email							
Change Columns		d All Collaps		Export				
change columns	Expan	Comps	e //i	Export				
Drag a column he	ader here to gro	oup by that colum	n					
EmailID	Date Added	Date Sent	Re	cipient Addresses	Subject	Last Error	Trys	Last Send Attempt
2	-	9		2	\$	2	2	- 3
42	22/05/2012		anr	a.leone@petermac	Riskman Delegate Notification		0	
41	15/05/2012		ten	nille.lewin©peterm	Alert 67 from RiskMan: High Risk Radiation Therapy Incident Notification		0	
40	15/05/2012		jim	.cramb@petermac.	Alart 66 from RiskMan: High Risk Incident Notification		0	
39	15/05/2012				RiskMan Alert Error		0	
38	15/05/2012				RiskMan Alert Error		0	
37	15/05/2012				RiskMan Alert Error		0	
36	15/05/2012				RiskMan Alert Error		0	
35	15/05/2012				RiskMan Alert Error		0	
34	15/05/2012				RiskMan Alert Error		0	
33	15/05/2012				RiskMan Alert Error		0	
32	15/05/2012				RiskMan Alert Error		0	
31	15/05/2012				RiskMan Alert Error		0	
30	15/05/2012				RiskMan Alert Error		0	
29	15/05/2012				RiskMan Alert Error		0	
28	15/05/2012				RiskMan Alert Error		0	
	ms) < [1] 2	3 3						

- 2. If you want to view all emails that have been sent
  - Uncheck "Unsent Only" 1
  - Modify the Date Range 2 (when the email was logged to be sent)
  - Filter the type of emails that you wish to preview from the Reason Sent <sup>(2)</sup> field e.g. Alerts, Distribution Lists
  - Press Refresh 4

Unsent Only 🔲 👩	From Dr	4 23/04/2012	2	<b>I Log</b>	Reason Sent	8	4 Refre
Mark as sent		Mark as Sent		000000			- New
Double Click a row to vie Change Columns Drag a column hear	w the Email. Expand All der here to group by	Collapse All	Export				
EmailID	Date Added	Date Sent	Recipient Addresses	Subject	Last Error	Trys	Last Send Attempt
\$		- 7	\$	2	0	2	
81567	11/05/2012	11/05/2012	anne@riskman.net.au	RISKMAN.NET Item Review Request		0	
80991	3/05/2012	3/05/2012	Sanjay@riskman.net.au	RISKMAN.NET Item Review Request		0	
80954	3/05/2012	3/05/2012	scotte@riskman.net.au	RISKMAN.NET Item Review Request		٥	
	27/04/2012	27/04/2012	vishal@riskman.net.au	RISKMAN.NET Item Review Request		0	
80553		27/04/2012	scotte@riskman.net.au	RISKMAN.NET Item		0	

**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 1
  - If the Date Sent ② field is not empty, clear the content of this field
  - Other changes can be made to the email, e.g. email subject, email body <sup>6</sup>
  - Press Save Changes ④ at the bottom of the email
  - The email will be re-sent when the next email scheduling cycle begins on your RiskMan

	Email Editor	-
Please note: Under the current	t Email sending scheme the SMTP server used will be picked up from the global setting, so changes here would have no effect.	
Date Added 22 M	fay 2012 12:06	
Date Sent	2	6
Recipient Names leon	ne anna	6
Recipient Addresses anni	ia.leone@petermac.org	6
CC Recipient Addresses ann		- 6
Subject Risk	kman Delegate Notification	_
MIML Dody	- ○ 略 略 P (P P I x' x I H H 王 王 ● ● ● ■ マ	
	• • • B / U S E E E E • • A •	
€	Design MTML Preview	
Hay To a	ne znna (Japone Anna). dea, Anna (Jakupdan) has graened yno annaes to uae thair fisikifan anzanurt, to takin alfant from 22 titay 2012 to 31 titay 2012. assame fak lighethy of ingelen, Anna (Jakupdan), log loss Establisha angrup ann annaemann and pasamod, and from the menu, select and an annae that and an annae	
	•	
	nger aneeğriskman.net.au	2
SMTP Server	Innegration Interaction	2
Sender Name		
	anee@riskman.net.au	2
	man Delegate Notification	2
iource		2
Source ID 0		2
Error Count		
Last Error		1
Error on Last Try	4	1
Close	Save Changes	1
	mail in any way, a comment will be added to the body indicating that you have done so. Editing a Password email will d is is intentional and for security.	lest

- 4. If you want to search for emails sent to a user
  - Ensure you have Unsent Email 

     unchecked so you are displaying the Sent Email
  - Enter the date range 2 when the emails were sent
  - Ensure Reason Sent = All Items 6
  - Filter the **Recipient Addresses** ④ 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

				il Log		ß
insent Only 🔲 🚺	From Date	23/04/2012	· 2	3/05/2012	Reason Sent	
Mark as sent		Mark as Sent	0			
ouble Click a row to vie	w the Email.					
Change Columns	Expand All	Collapse All	Export			
Drag a column hea	der here to group by	that column				
	der here to group by Date Added	that column	Recipient Addresses	Subject	Last Error	Trys
			Recipient Addresses		Last Error	Trys
EmailID	Date Added	Date Sent	sanj 👍 😒	Begins with	Last Error	
EmailID 80991	Date Added	Date Sent           •         •         •           3/05/2012         •         •	sanj <b>4</b> Sanjay@riskman.net	Begins with Contains	Last Error	
EmailID	Date Added	Date Sent	sanj 👍 🔤	Begins with Contains Doesn't contain	Last Error	
EmailID © 80991	Date Added	Date Sent           •         •         •           3/05/2012         •         •	sanj <b>4</b> Sanjay@riskman.net	Begins with Contains	Last Error	

## **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

😤 🜍 My Worksp	vace   Management   Administration   Reports   Help   Log Out   USER: System Manager (Manag							
Attach Document Settings								
1. Documents Upload T	ype (Security Type) - Note : This is a one time setting and cannot be changed in future.							
Database (High)	RiskHan Database     Other Database     Other Server							
🔵 File System (Low	)							
2. Temporary Path	C:\Temp							
3. Max Document Size	(MB) 1 3							
Save Upload Settings	<b>4</b>							

• 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 - <u>support@riskman.net.au</u>
- 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

**Perporary 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

• 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

**(4)**: 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

# **CRLDatix**<sup>®</sup> RISKMAN QUICK REFERENCE GUIDE TO SYSTEM CONFIGURATION & TOOLS

 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

								Audit Log	¢	-
								Drag a column header here to group by that column		
Date			User		Action			Action Description		
	•	7		4		1	7			1
21 Apr 201	7 14:18		Manager		Global Setti	1g edit		Change Global Setting 'ShowCompCustReportFooterUsername' from '0' to '1'		
21 Apr 201	7 14:21		Manager		Global Setti	1g edit		Change Global Setting 'ShowCompCustReportFooterUsername' from '1' to '1'		
21 Apr 201	7 14:25		Manager		Global Setti	1g edit		Change Global Setting 'InfoCentre_MaxWigdetGroup' from '10' to '4'		
21 Apr 201	7 14:44		Lauren Manager		Incident De	fault		Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 201	7 14:44		Lauren Manager		Risk Default	Widg.		Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 201	7 14:51		Lauren		Global Setti	1g edit		Change Global Setting InfoCentre_MaxWigdet' from '6' to '6'		
21 Apr 201	7 15:11		Lauren		Global Setti	1g edit		Change Global Setting 'DontDisplayFieldsInReportsMask' from '************************************		
21 Apr 201	7 15:16		Lauren		Global Setti	1g edit		Change Global Setting 'DontDisplayFieldsInReportsMask' from 'Do Not Have Permission To View' to 'sococococo'		
21 Apr 201	7 15:52		Lauren		Global Setti	1g edit		Change Global Setting 'ReasonForLinking' from '0' to '1'		
21 Apr 201	7 16:00		Lauren		Global Setti	1g edit		Change Global Setting 'TitleMandatoryPrefixSuffix' from 'None' to 'Prefix'		
21 Apr 201	7 16:00		Lauren		Global Setti	1g edit		Change Global Setting 'TitleMandatoryPrefix' from " to '#'		
21 Apr 201	7 16:00		Lauren		Global Setti	1g edit		Change Global Setting 'TitleMandatoryPrefix' from '4' to '4'		
24 Apr 201	7 11:26		Manager		Item Form I	.oaded		Form loaded, Register=Incidents(Incident), Display ID=3573		
24 Apr 201	7 11:41		Manager		<b>Bem Form</b>	oaded		Form loaded, Register=Incidents(Incident), Display ID=3599		

Press enter to update the list

👌 🛛 My Wol	kspace • Managen	nent - Administrati	on - Reports - Help - Log Out Feedback Module	ISER: System Manager (Mana				
			Audit Log	0 2				
Drag a column header here to group by that column								
Date 💌	User 💌	Action 💌	Action Description					
21 Apr 2017 💿 🔹 🕈		2		1				
21 Apr 2017 14:18	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFosterUsername' from '0' to '1'					
21 Apr 2017 14:21	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsername' from '1' to '1'					
21 Apr 2017 14:25	Manager	Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdetGroup' from '10' to '4'					
21 Apr 2017 14:44	Lauren Manager	Incident Default	Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted					
21 Apr 2017 14:44	Lauren Manager	Risk Default Widg	Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted					
21 Apr 2017 14:51	Lauren	Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdet' from '6' to '6'					
21 Apr 2017 15:11	Lauren	Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from '********* to 'Do Not Have Permission To View'					
21 Apr 2017 15:16	Lauren	Global Setting edit	Change Global Setting 'DontDisplay#ieldsInReportsMask' from 'Do Not Have Permission To View' to 'xxxxxxxxxxx					
21 Apr 2017 15:52	Lauren	Global Setting edit	Change Global Setting 'Reason/ForLinking' from '0' to '1'					
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefixSufftx' from 'None' to 'Prefix'					
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from " to '*'					
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from '*' to '*'					

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

1	S My Workspace Management Administration Reports Help Log Out	USER: System Manager (Manager)
с.	nd User(s) having Permissions	*
FII	id oser(s) having Permissions	н
Cor	nditions : Must have any one permission V Find Users	
	InCheck All Check All	
Us	er Permissions for Incidents	
100	NotForDisplay Show only "Alerted" items in Reports	
	Basic Permissions	
10		
12		
	Can use the "Print" report from an unposted entry	ساسس السالي
CY15	Enrorce Campus" / Department Restriction-on Rox Register:	می از این از می داد. می از این این می داد از میرا داد با این می می می می می می ورد این ا
100	Can View Enterprise wide Risks (No Campus* / Department specified):	
100	Can Edit Enterprise wide Risks (No Campus* / Department specified):	
1	Allow user-defined access to nominated Risks.	
	Administrative Permissions	
10		
	Attach Document Permissions Can Attach Own	
	Can View Subordinates	
100	Can View All	
	Can Delete Own	
	Can Delete Subordinates	
	Can Delete All	Ξ

#### 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

and Users	
UserName	
Reck, Sue (beck sue)	
Hamilton, Cassandra (Cassandra)	
CLO (CLO)	
	Beck, Sue (beck sue) Hamilton, Cassandra (Cassandra)

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)

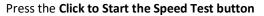
The Email Log allows you to view sent and unsent emails via RiskMan to be able to identify issues. Email could be generated from Alerts, Delegation, Distribution Lists and Broadcast Emails as an example.

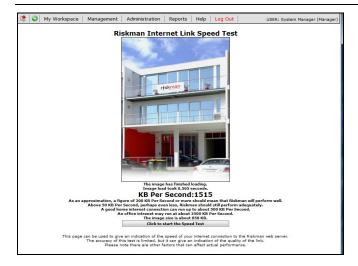
Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of email entries* to set automatic purging once each respective record type reaches a certain age.

## Speed Test

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







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

٢	My Workspace	Management	Administration	Reports	Help	Log Out	USER: System Manager (Manager)
RiskM	an Email Test	Tool					
Recipient's	Name:						
Recipient's	s Email Address (To):						
CC:							
Subject:							
Body:					÷		
Sender's N	amei						
Sender's E	mail Address:						
Reply-To E	mail Address:						
Mail Serve	n						
Port:		25					
Mail Authe	ntication:	None	-				
Username:							
Password:							
		Send Mail					

- 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

Warning,	if you have an existing VHIMS I	ogin but have forgotten your usernar	e and/or password please contact you ager/staff relationships are based up:	r VHIMS Support person. Do N	OT create another VHIMS login as incident
Username		parentssion and man	ager i acer reaccontript are passed up:		
Your Password Confirm Password					
First Name					
Sumame					
Sumanie			Rendico	100	
YOUR Campus"(s)			Box Hill East Melbourne Epworth	(H)	
Your Organ	isational Email Address				
Phone numi	ber				
Your Positio	m				
Create the	Account				Cancel
NOTES:					
	USERNAME	Is the name you will use We recommend your ne The Username must be	twork login, if you have one.		
	PASSWORD		sed people may view your for ice to confirm you didn't mak		first time.
	FIRST NAME	Is your first name.			
	SURNAME	Is your sumame.			
	YOUR Campus*(s)	The Campus*(s) where y	ou work. Hold CTRL and click	for multiple Campus*:	40)
	EMAIL		ss, so you can be contacted	8	
	PHONE	Your office phone number	r.		
	POSITION		make it easier to find you.		

• "User Login" section on the front page

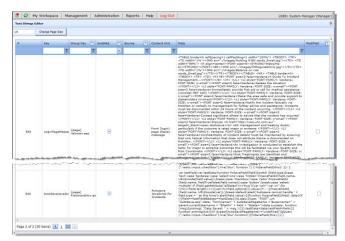
USER LOGIN
OSEREOGIA
Username
Password
Submit

• "For New Users" section on the front page



#### To access the Text Editor Tool

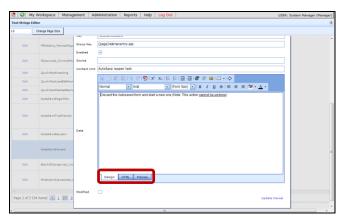
1. Select Administration -> Tools -> Text Editor Tool



Next to the text that you wish to change press the Edit button

Strings E	ditor				6
	Change Page Size				
		n.67	reconnection		
Edit	PBActions_FormatPag		(page)riskmanentry.asp		
		Enabled			
Edit	F83ournais_FormatPa	Source			
Edit	QuickPostHeading	Content Hint	AutoSave reopen text		
tela.	QuickPostLastEdition		Discard the Autosaved form and start a new one (Note: This action <u>cannot be undone</u> )	^	
Edit	QuickPostPostedNerry				
Edit	AutoSavePageTitle				
Edix	AutoSaveTopPrompt				
Edit	AutoSavaReopan	Data			
	AutoSaveDiscard				
Edit	@lockOOavascript_Inc				
			Design HTML Preview	*	
Edit	PreSubmit/aveauripl_				
		Modified			
2 of 3 (	(34 items) 🚺 1 [2] 1			Update Cancel	

- 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 - <a href="mailto:support@riskman.net.au">support@riskman.net.au</a>

#### **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

My Workspace	Management	Administration	Reports	Help	Log Out		USER: System Manager (Manager
		Recre	ate Risl	Man	Procedure	s	
This page :	allows you to Recre	ate certain SQL proce	dures and fu	nctions th	at need to be dyna	mically generated in the	RiskMan system.
Sp def	ecifically, the incide ined label) and the	nt and feedback form data type of the field	s will display	additional	debugging functio information about a. This will only aff ct operation of the	actual field names (as w	ell as the he button,
		(i	Turn ON de	bugging	lisplay.		
			Turn OFF d	ebugging	display.		
p	rocedures are custo	m to an implementat	ion, based or	the spec	fic configuration of	s that are used by RiskMi the client site. The butto fication is made to RiskM	na below
	dding new fields to	eate these procedure the Incident or Feedl ended that you run th	pack pages. T	hese pros	edures are safe ar	d quick, so if you are una	an, e.g. sure it is
	Incident	t and Extensions Post	ted View		Incident and Exte	nsions UnPosted View	
	Feedbac	k and Extensions Pos	ted View		Feedback and Exte	naions UnPosted View	
	Feedbac	k and Extensions Pos Generate flat views		ster (vwR			
	Feedbac	Generate flat views			eg_SubModuleTyp		
	Feedbac	Generate flat views	for each Regi Incident Rep	ort Post S	eg_SubModuleTyp		
	Feedbac	Generate flat views	for each Regi Incident Rep Incident tab	ort Post i les report	eg_SubModuleTyp Processing		
	Feedbac	Generate flat views	for each Regi Incident Rep Incident tab	ort Post i les report les repor	eg_SubModuleTyp Processing ing SQL functions. ting SQL functions.		
		Generate flat views Related Related	for each Regi Incident Rep Incident tab Feedback tab Generate Si S account use	ort Post i les report iles repor ibform 50 d. You wi	eg_SubModuleTyp Processing ing SQL functions. ting SQL functions. )L Views.	Posted])  s authentication code.	
		Generate flat views Related Related	for each Regi Incident Rep Incident tab Feedback tab Generate Si S account use d to contact S	ort Post i les report iles repor ibform 50 d. You wi	ng_SubModuleType Processing ing SQL functions. ting SQL functions. 2L Views. 2L Views. 1 be prompted for a or assistance with t	Posted])  s authentication code.	
 	This but	Generate flat views Related Related Related Test You will new These U	for each Regi Incident Rep Incident tab Generate Si S account use of to contact F SMS U bottons are sy pure the abilit	ort Post I les report abform 50 d. You wi tiskMan fi lser Acco pecifically y to deliv	eg_SubModuleTyp rocussing ing SQL functions. ting SQL functions. (L Views. I be prompted for assistance with U int for VHIMS situs. for VHIMS situs.	•[_Posted])	
 	This but	Generate flat views Related Related Related Test You will new These U	For each Regi Incident Rep Incident tab Feedback tab Generate Si S account use d to contact F SHS U buttons are sp pure the abilit roduction Liv	ort Post S les report abform St d. You wi RiskMan f. Iser Accor pecifically ty to deliv e servers	eg_SubMeduleTyp Processing ing SQL functions. (L Views. (L Views. (L Views. (L Views. (L Views. (L Views. (L Views. (L Views.) (L Views. (L Views.) (L Vie	e[_Posted])	

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

😤 😳 My Workspace		Help Log Out	USER: System Manager (Mana
	Incide	ent Entry	
DEBUG: Click to show	You will not be able to ch	to record the incident. ange the form once entered.	
Who Was Affected?			
Incident Involved	ID: IncidentInvolved - maxlength="255" Patient/Client • ES	Nedical Record #	ID: MedicalRecordNo - maxlength="255"
	ID: FirstName - maxlength="255"	_	
	ID: Surname - maxlength="255"		
	ID: DateOfBirth -	Age	
	ID: Sex - maxlength="50"		
	ID: Street - maxlength="150"		

#### **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*).

Save and Exit Cancel				> Search	
Specialty List					
ECIALTY SET					
Benetiteitos     Benetitei     Candiac subserverional     Candiac Subs	Display All	Emergency medicine	Display All	Hedical	Display All
Neonatal	Display All	Obstetrics	Display All	Paediatric	Display All
Pathology	Display All	Psychiatry	Display All	Radiology	Display All
Rehabilitation	Display All	Surgical / Procedural	Display All		
elcted Classifications			Paediatric		

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 -<u>support@riskman.net.au</u>

#### 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

