Release Notes

For RiskMan Version 1902

Last reviewed January 2020

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Introduction

This document provides an overview of new features, and enhancements to existing features, included in RiskMan version **1902**. The previous released version of RiskMan was 1807.

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:** ● ● ○

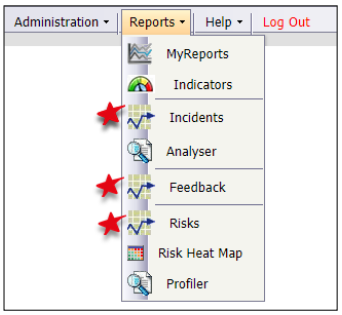
One of the fundamental reasons for using a system like RiskMan is so that you can generate meaningful qualitative reports. Such reports help you answer important questions about what is happening in your organisation, and will help inform key decisions made at all levels of your business.

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.

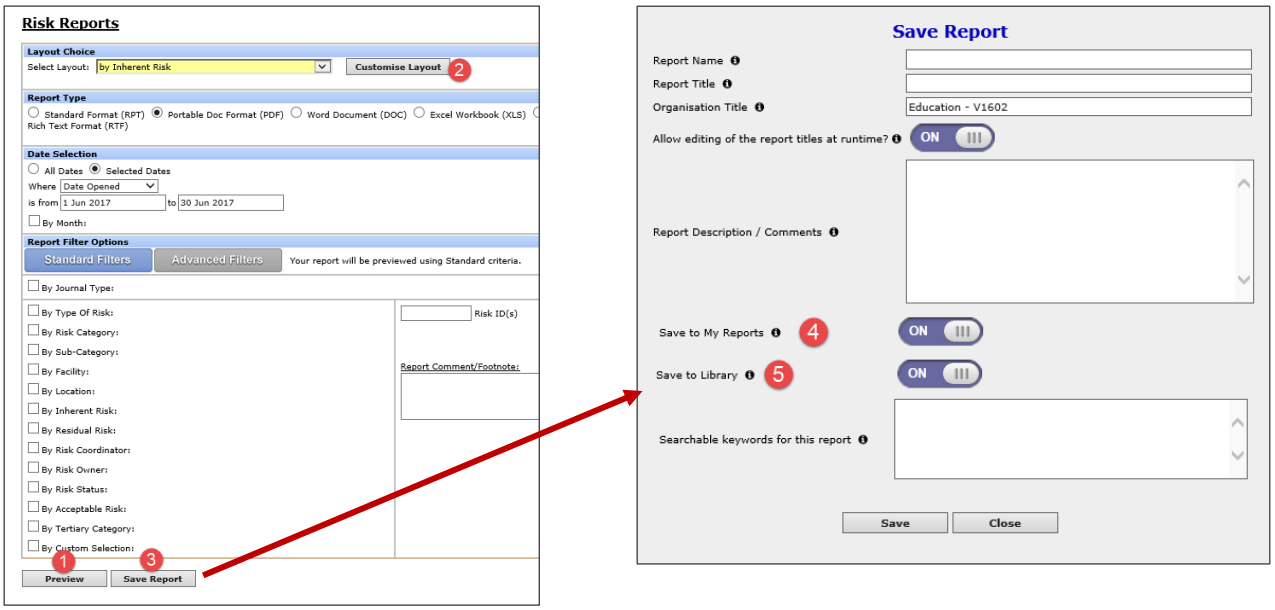
Clicking any of these menu options takes you to the report *creation* page for the respective register.

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.

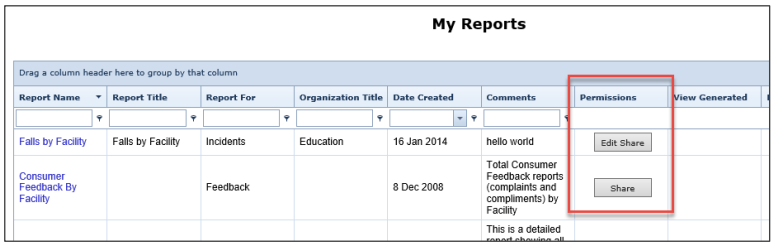
Finally, users with the appropriate permission will be able to **save the current report setup** ❸ either as a **My Report**, or to the **Report Library**, or both.



Working with My Reports

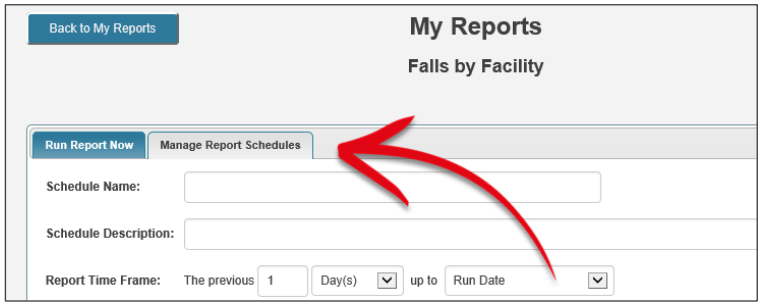
The My Reports page contains all the reports the user has permission to see – whether they created the report themselves, or was shared to them by another user.

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



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.

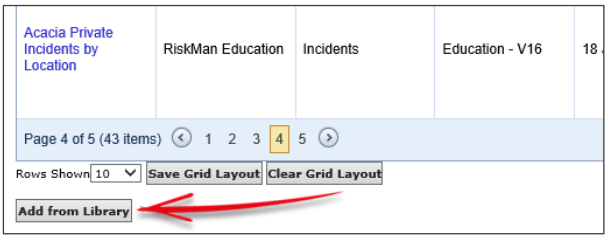


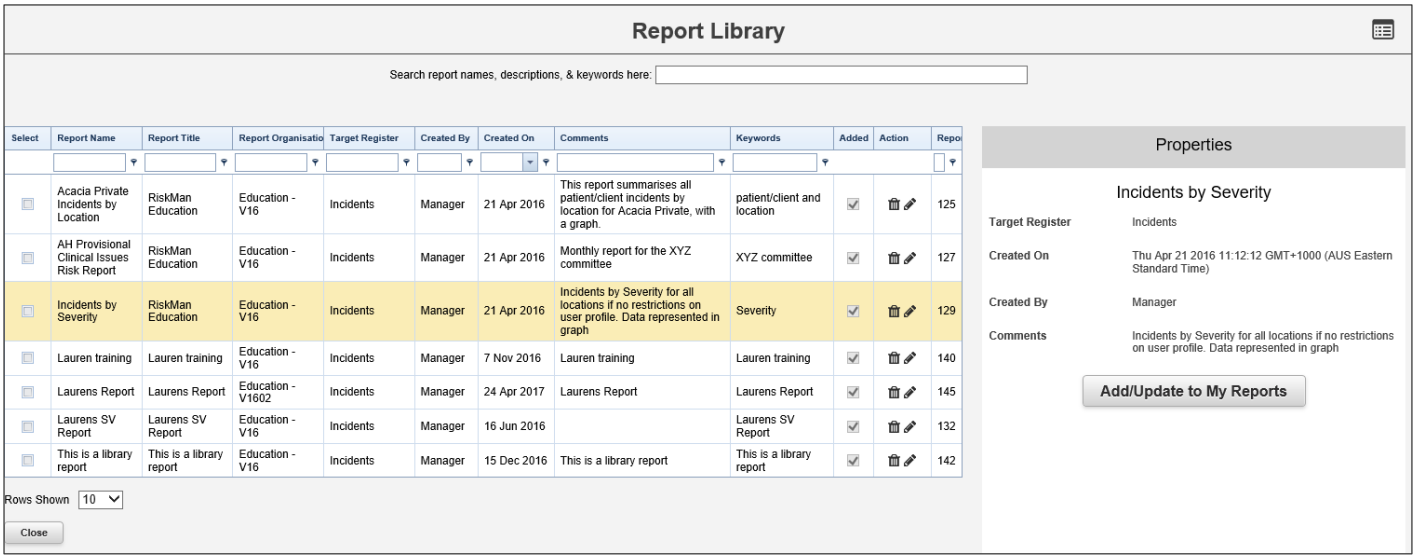
Interestingly, there is no user permission around deleting shared My Reports. This meant that any user who can *see* a My Report, can also delete that report, irrespective of whether it was a report that user created, or a report that was shared to them. Needless to say, this is fuctionality that has 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.





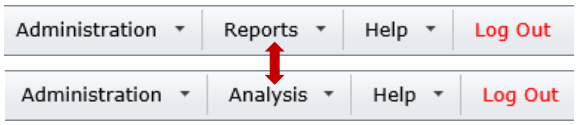
The Report Library was not a very widely used tool (introduced in version 1601, January 2016).

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**:



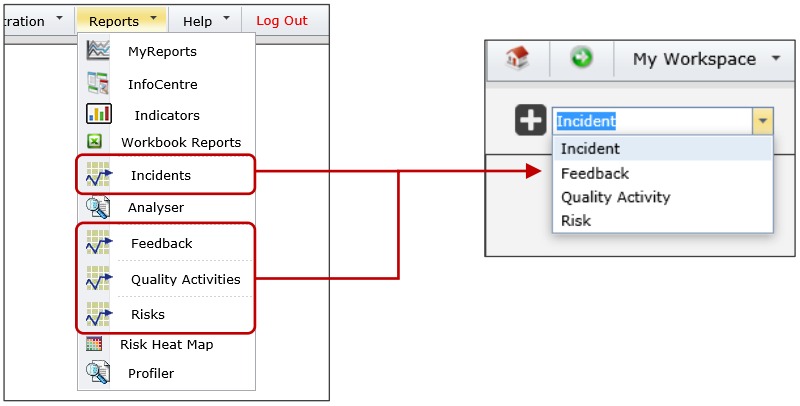
Within this menu option are the different analysis tools in RiskMan: the InfoCentre, Indicators, Workbook Reports, Analyser, and, **Reports**. We specifically wanted to re-purpose the term “reports” to represent the qualitative data reports that can be generated in RiskMan.

Changes to the User Interface

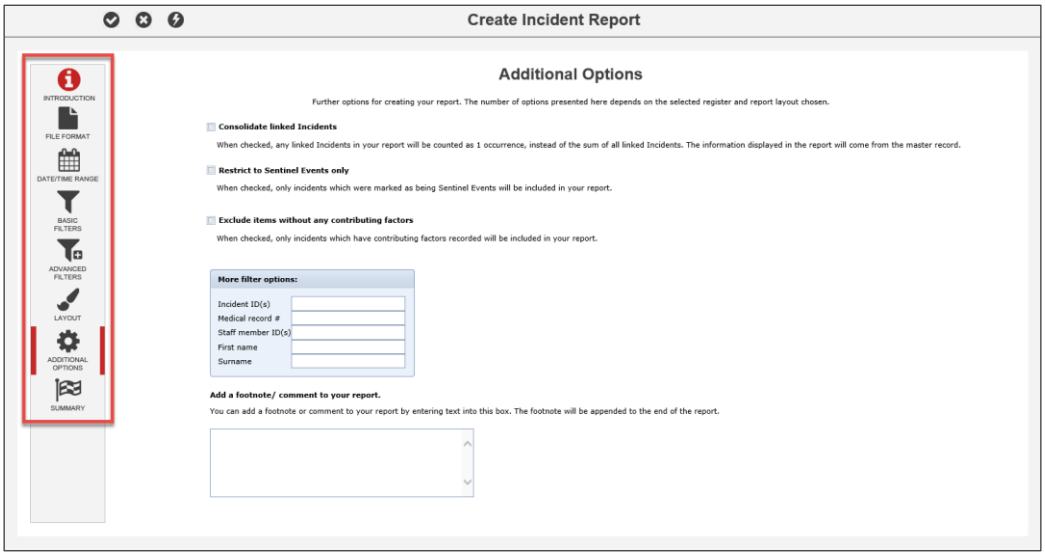
Creating Reports

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:

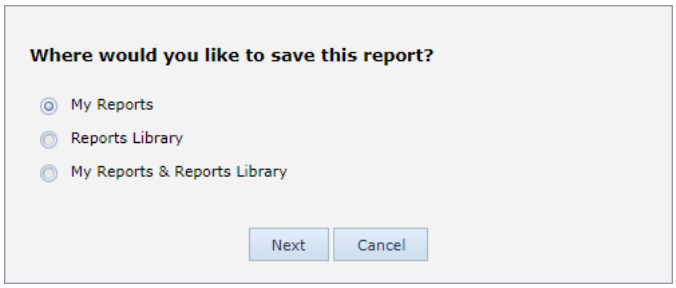


The report creation page also follows on from the alert creation page. The various settings you can configure for a report are arranged into logical groupings. The idea is to go from top to bottom through those option groups, and configure what is required. Refer to the **Creating Reports** guide for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

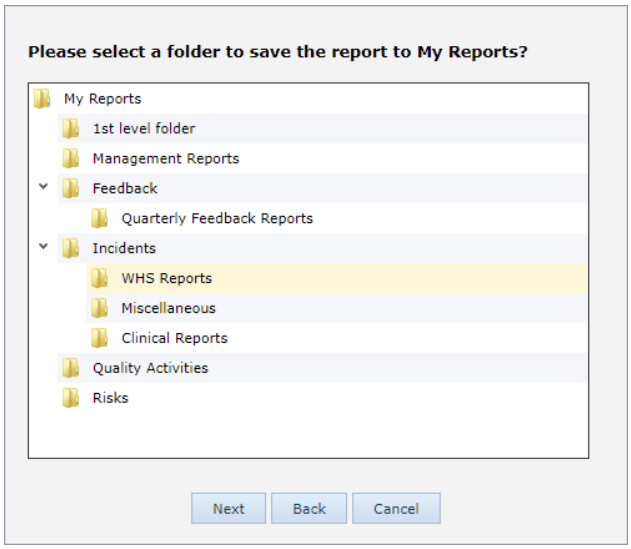


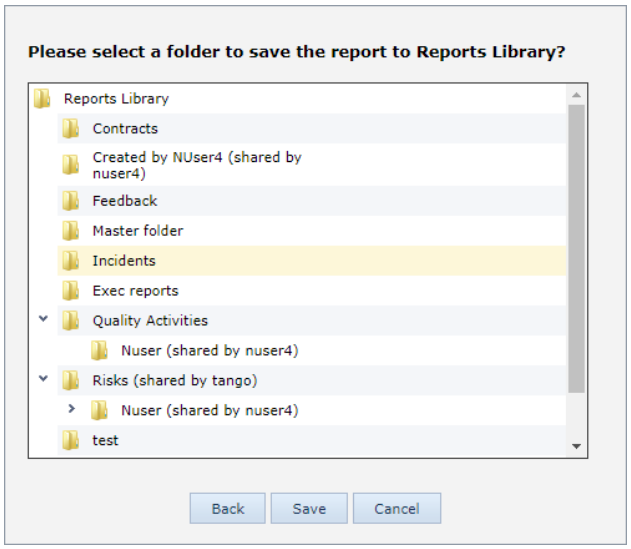
Saving Reports

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:



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:



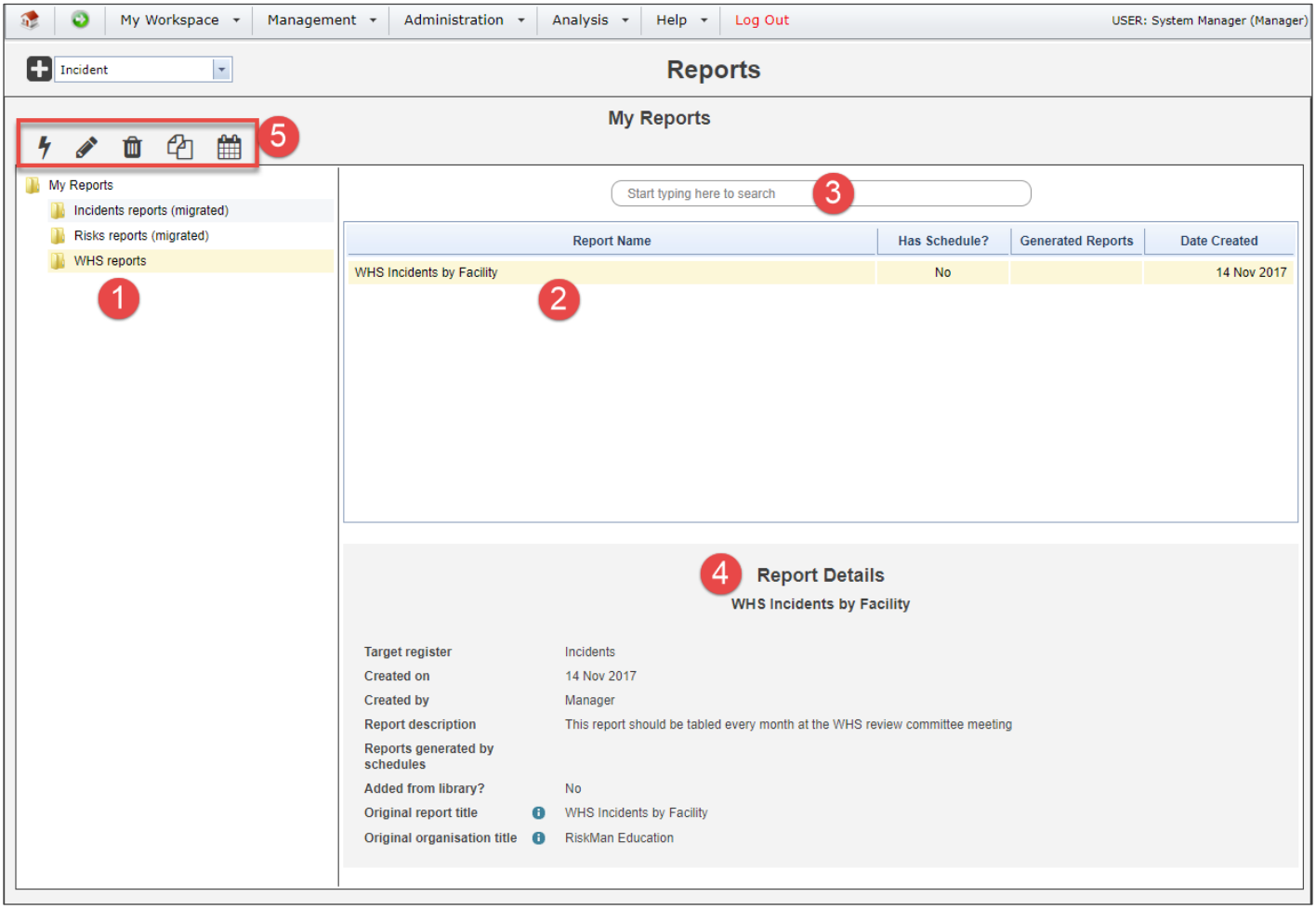


The My Reports Experience

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.



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.

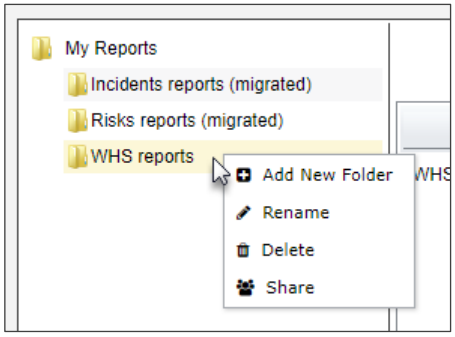
❸ **Search this folder:** You can also search for reports from the current folder by name, description, and keywords. Start typing your search term and any matching reports will appear in the report list.

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:

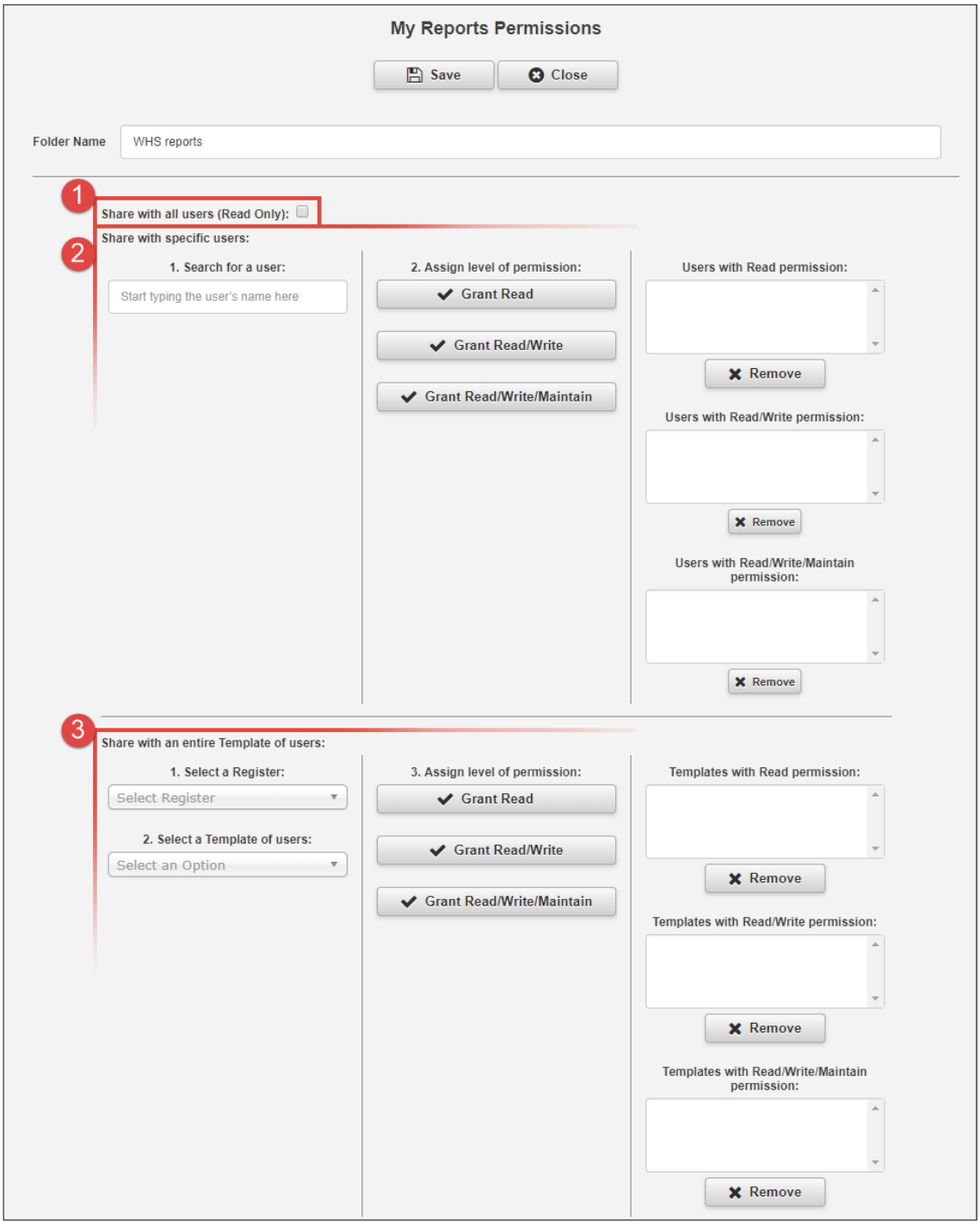
PERMISSION	WHAT CAN THE USER DO?
Read	The user can see and run all the reports in the folder. They cannot add reports to the folder.
Read / Write	The user can see and run all the reports in the folder. They can add reports to the folder (provided they have the user permission to save reports).
Read / 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



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

❷ **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.

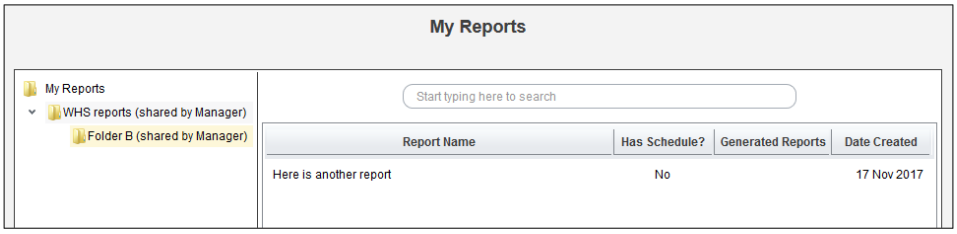
❸ **Share with entire Template of users:** Select the register which contains the template of users to whom you want to grant permission, then select the desired template from the second drop down box. When you find the desired template, grant it the level of permission you want it to have. The template 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.

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

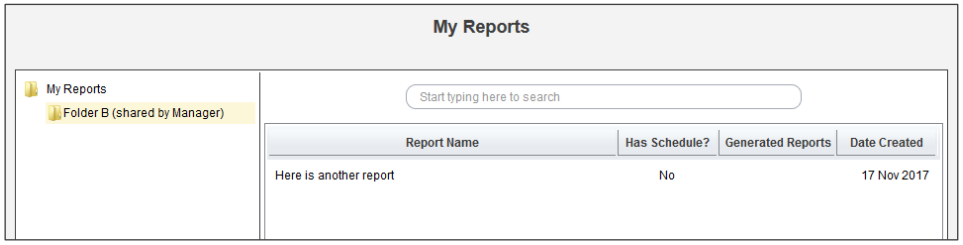
Let's look at the following folder structure example:

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:

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:



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:



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	• 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	• Decide if you are going to utilise both My Reports *and* 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	In your demo, training, or other non-production system, navigate to *Administration* > *Tools* > *Migration Tools* > *Report Library Migration Tool*. If you cannot see the Tools menu under Administration, it is because you do not have the user permission *General Tab* > *Can modify Global Settings.* The migration must be done in two stages. Run stage one now – do not complete stage two yet. 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.
Stage 4 Review & test	• 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	• 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	• 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.

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”

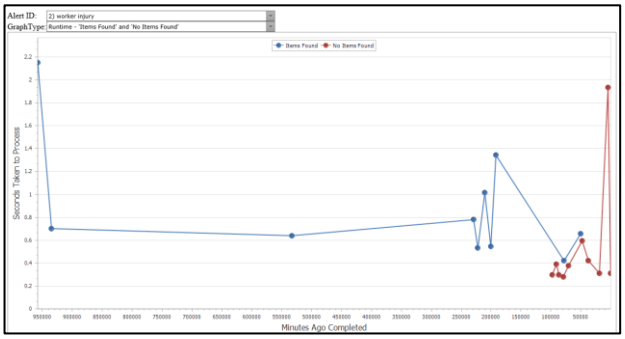
Significance: ● ○ ○ **Need for training:** ● ○ ○

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:** ● ○ ○

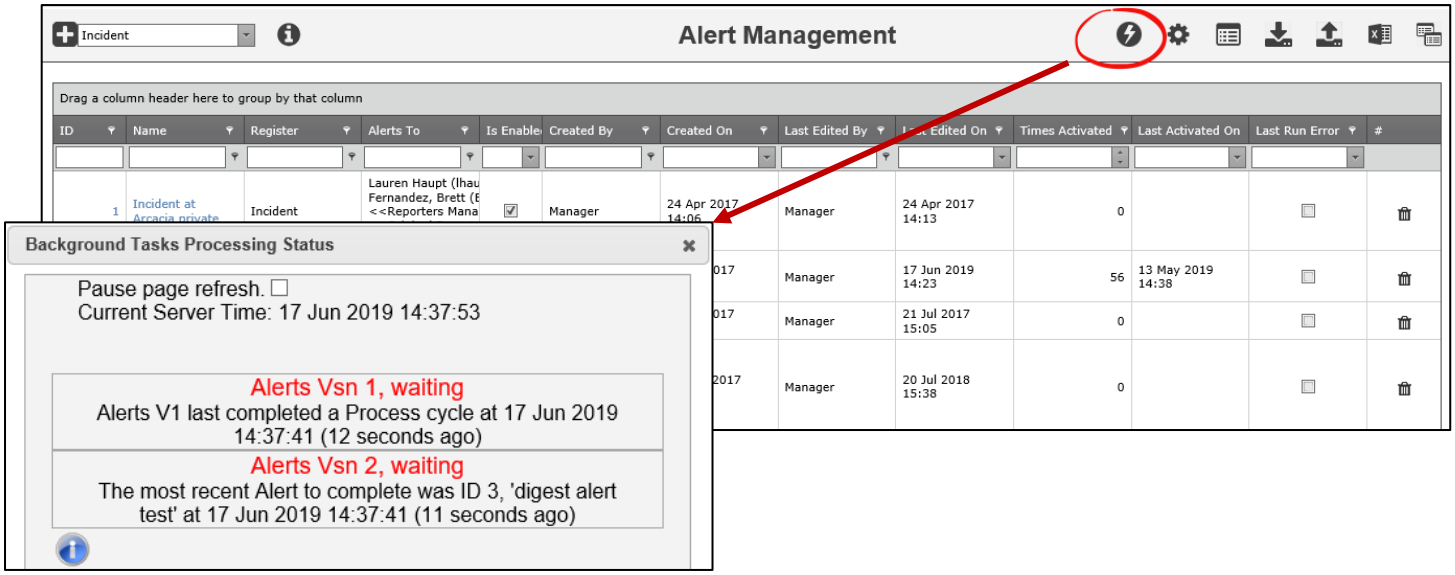
Visually represent the alert logging in a graph and its performance. The graph displays Items found and No Items Found data. You can select the Alert you want view along with the graph type.



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



Alerts Version 2: Digest Emails

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

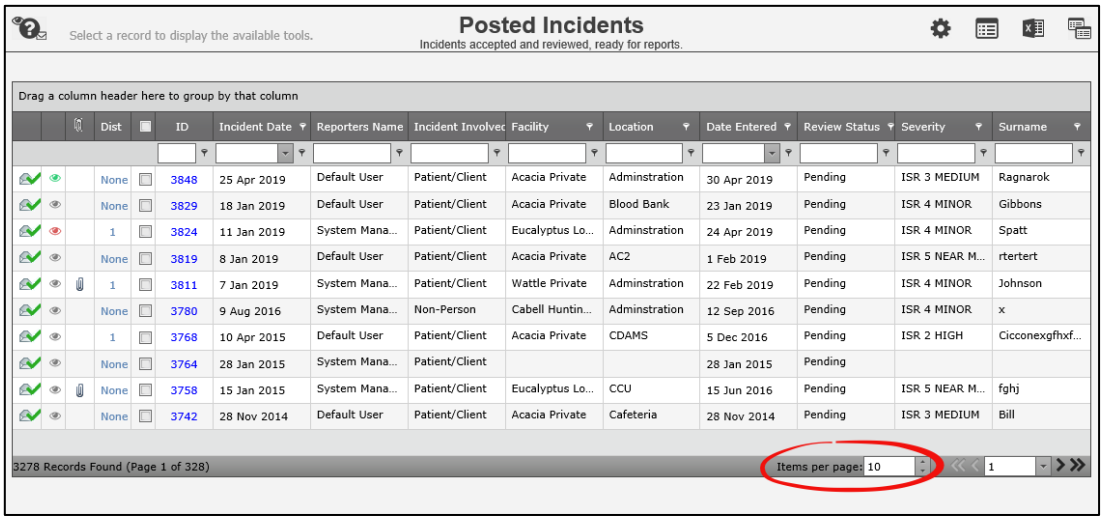
Digest emails are now available for Periodic Alerts. A time when you would use this, you may wish to see all the actions that are due this week.

List Pages: Items per page

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



InfoCentre: Zoom

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

The zoom function allows you to zoom in on **Bar/Column** and **Line charts**.

To zoom, click and drag a rectangle over the chart area that you wish to focus on and release the mouse button.

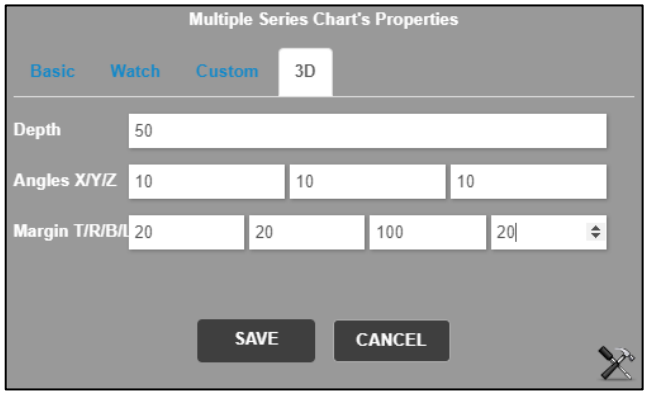
To zoom out, click the **Reset zoom** button in upper right of the Widget window.

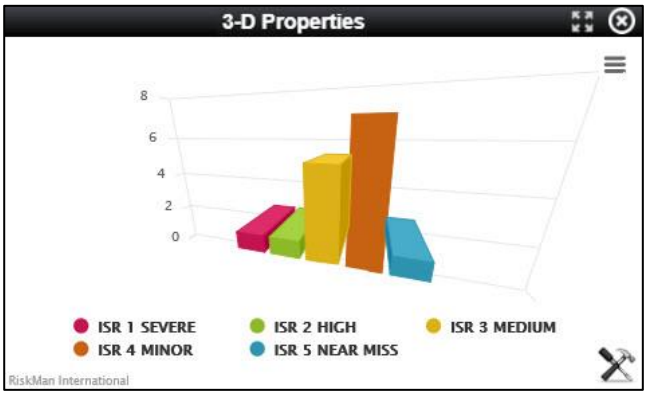
You can only zoom-in on Bar, Column, Line, and Area charts. You cannot zoom in on Pie charts, Gauges, Frames, or Grids.

InfoCentre: 3D

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

Bar, Column, and Pie charts can be displayed with a 3D effect applied. The settings can be used as a starting point if you wish to try this effect.

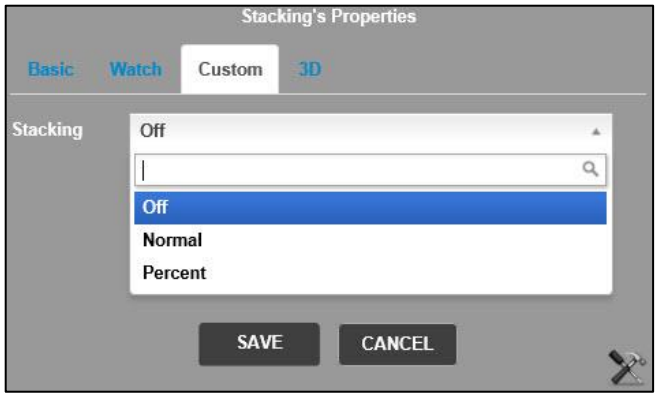


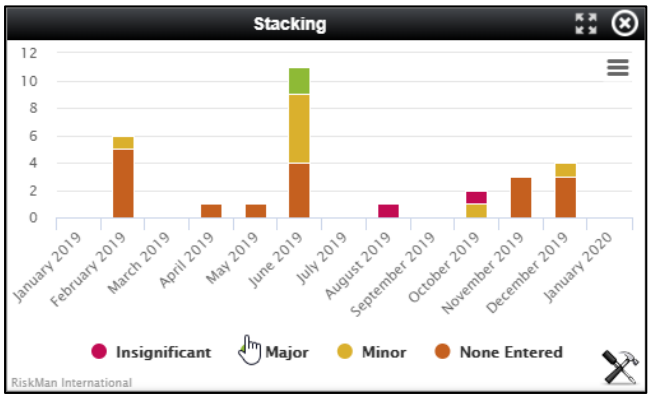


InfoCentre: Stacking

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

You can select to display a Multiple Series chart in a stacked format, calculated by number or percentage.



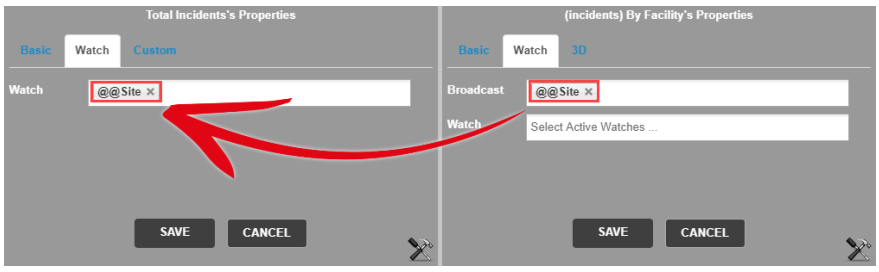
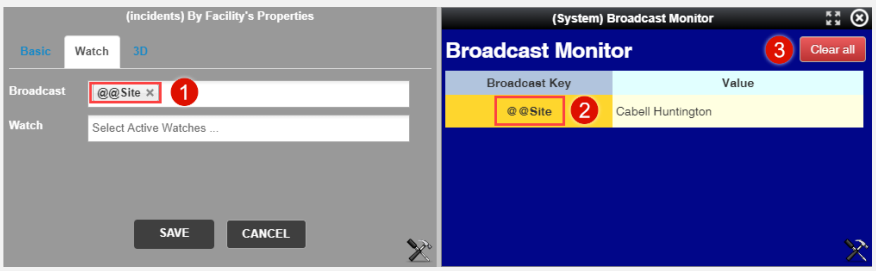


InfoCentre: Watch / Broadcast

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

The InfoCentre Broadcast / Watch functions allows InfoCentre Widgets to send and receive data to each other.

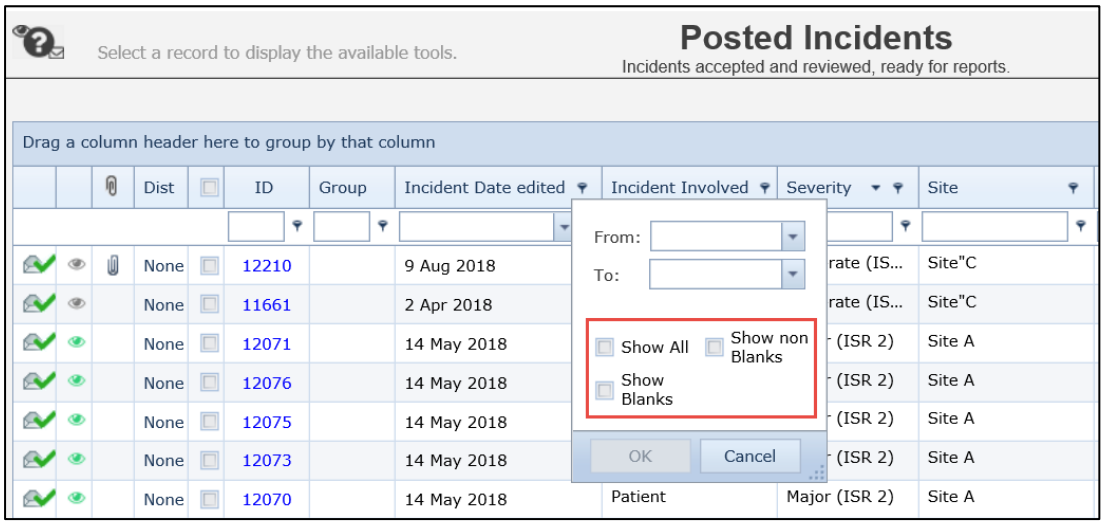
The effect of this is that a user can click on an element in one widget and the data in a different widget will change, being filtered by the user's selection. This needs to be configured within a datasource.

	The Gauge Widget is displaying the total number of incidents (28) recorded and is watching Location (Site). The Bar chart is displaying Incidents by facility and is broadcasting Location (Site).
	If you click on the Cabell Huntington bar which has 5 incidents, the Facility Widget will Broadcast the Cabell Huntington site data as a filter to the Gauge that is watching.
	The Gauge will receive the Broadcast data and change to display only the number of incidents at the Cabell Huntington Location.
	If you view the Watch tab under the Widgets Properties you can see the Watch and Broadcast properties of each Widget. Note that the field being Broadcast is called **@@Site**, this is the database name of the Incident form field.
	The System Broadcast Monitor (SBM) is a default Datasource that is available to you for checking and resetting Broadcast data. ❶ The Widget is Broadcasting **Site** ❷ The SBM shows the Key and Value ❸ Click **Clear All** to reset Widget data

List Pages: Allow filtering of empty values (Date fields)

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

The ability to be able to identify fields that do not have values within a date fields has been included. This has always been available for text fields but not for date fields.



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.

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.

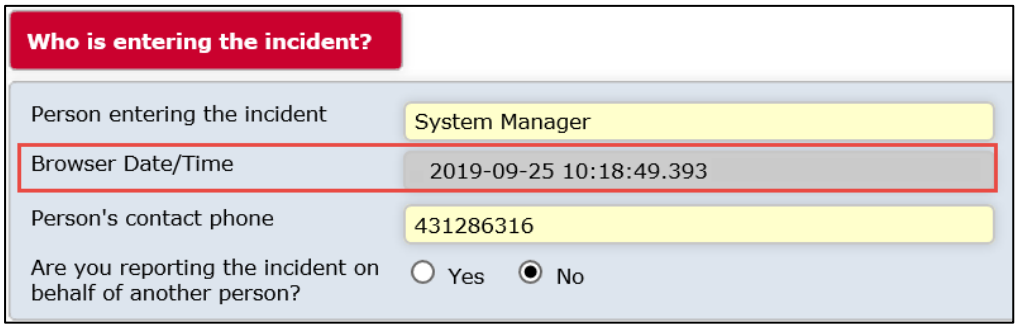
- **No longer an individual menu item.**

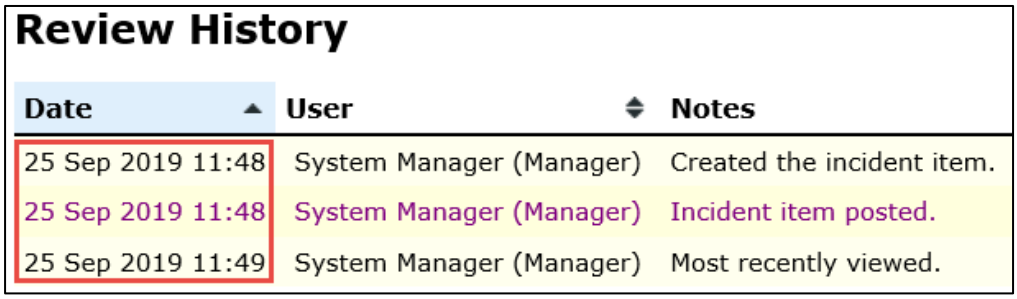
  Old feedback is now managed through all menu items as all other registers. This also means that old feedback will not open another browser window to be managed.

Webserver and Database Server Timestamps

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

We have added the ability to apply a field within a form to capture the date and time a record was submitted via a database field. Within the review history, the date and time stamp would be recorded based on where the database server is stored. For example, if you enter an incident in Adelaide, and the database server is stored in Melbourne, the Review History would stamp the details in Melbourne and what ever the time was there not in Adelaide.





If utilising this feature, The Review History will still record the database server time but the time the incident was submitted will be recorded in the database field.

Note

This feature will be applied in consultation with RiskMan. A number of decisions will be considered on how this detail will be captured and viewed by the end user

System Changes

The following changes relate to administrative functionality in the system.

Scheduler Service: Date and Timestamp of Scheduler Edits and Installation

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

The initial installation of the Schedule Service will now be recorded. The time and date are also recorded if there are any edits or changes to the schedule Service. This time and date stamp will automatically update based on the installation or edit times

New Global Settings

The following Global Settings have been added:

Scheduler Service Server Settings> 70) Date that the scheduler was installed or last updated.

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?