

- Document Library -

FOR RISKMAN VERSION 2006

Last reviewed Sept 2020

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INTRODUCTION

This Reference Guide is intended for RiskMan Administrators who will be responsible for maintaining the library of documents added to records in all Registers.

The Document Library provides a listing of files that have either been

- Saved to a record in any Register
- Linked to a record in any Register but never saved with the notification or record– these are called “Orphaned” documents
- Deleted from records in any Register. Though deleted in the record, the files are still visible in the Document Library until they have been Deleted Permanently

The Document Library will allow a user with suitable permissions to

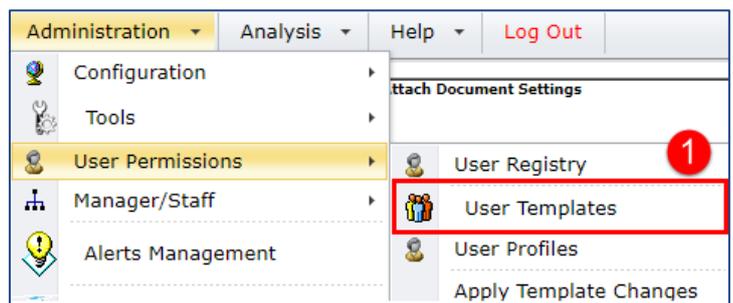
- Delete attached or orphaned files (can be restored if required)
- Permanently delete attached or orphaned files (cannot be restored)
- View attached, deleted or orphaned files
- Change the Description of an attached file

Permissions

To allow a user access to the Document Library, first ensure Permission has been selected in the User Template. Then the user will be able to see the Document Library menu item.

Permission to view the Document Library is located in the Permissions section of Templates.

- 1 Go to User Permissions > User Templates under the **Administration** menu



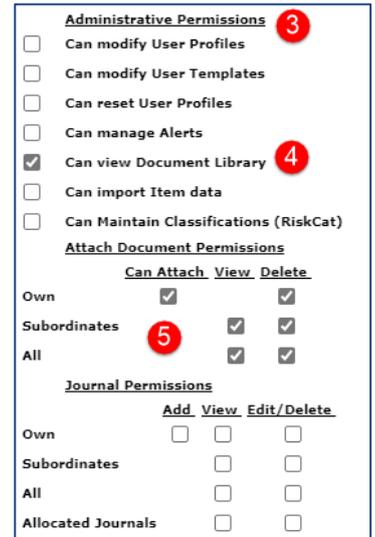
- 2 Select the **Register** for which you wish to enable the permission



3 Scroll to the section in User Permissions headed **Administrative Permissions**

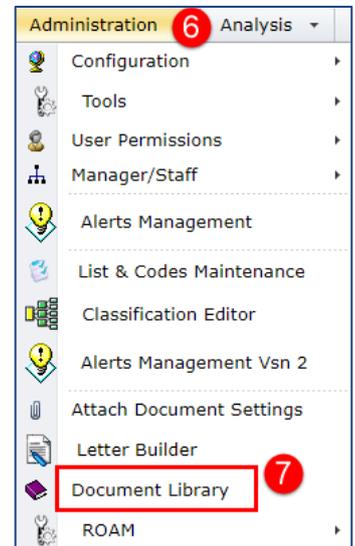
4 Click the check box to turn on the permission **Can view Document Library**

5 Select the appropriate **Attach Document Permissions** and save your changes



6 Now return to the main menu items and select **Administration**

7 The **Document Library** function will be visible to select for access to the Library. Users with this permission will be able to manage files that have been attached to records.



USING THE DOCUMENT LIBRARY

The Document Library is composed of three sections:

- 1 The Conditions and Registers
- 2 The Document Details, including information in the List section **plus** the Description at the foot of the List
- 3 The Document Review History

Document Library

This page allows you to view, search, delete, restore documents that have been attached in the RiskMan system.
 1. To open/download the document, click the corresponding "View" icon.
 2. To view the document's detail, click the corresponding Document ID.
 3. To delete/restore/permanently delete an attached document, check the documents and click the "Delete"/"Restore"/"Delete Permanently" button respectively.

	View	Document ID	Document Name	Attached By	Attached To	Date Attached	Attached To Register ID	Size (KB)
<input type="checkbox"/>		500039	Cheat Sheet for Line Managers (Generic)_V15.pdf	System Manager (Manager)	Incident	26 Apr 2017 13:53	3602	746
<input type="checkbox"/>		500038	Admin Cheat Sheet.docx	System Manager (Manager)	Incident	26 Apr 2017 13:50	3599	407
<input type="checkbox"/>		500037	Complaint letter.docx	System Manager (Manager)	Incident	18 Apr 2017 11:44		427
<input type="checkbox"/>		500036	Complaint letter.docx	System Manager (Manager)	Incident	18 Apr 2017 11:39		427

Document Details:

Document Name: Cheat Sheet for Line Managers (Generic)_V15.pdf
 Description: Document - This is a change
 Attached By: System Manager (Manager)
 Date Attached: 26 Apr 2017 13:53
 Size (KB): 746
 Document ID: 500039
 Attached To: Incident Register ID : 3602

Document Review History

Date	User	Action
26 Apr 2017 13:53	System Manager (Manager)	Document attached
26 Apr 2017 13:53	System Manager (Manager)	Document first viewed
26 Apr 2017 13:54	System Manager (Manager)	Document details edited
7 Aug 2020 11:28	System Manager (Manager)	Document marked as deleted
7 Aug 2020 11:28	System Manager (Manager)	Document restored
10 Sep 2020 15:41	System Manager (Manager)	Document details edited

Conditions

For Orphaned and Deleted Documents:

- 1 Select **Include** if you wish to see orphaned or deleted files AND saved files
- 2 Select **Exclude** if you wish to see JUST saved files
- 3 Select **ONLY** if you wish to see ONLY orphaned or deleted files

Conditions :

Orphaned Documents: Include 1

Deleted Documents: Include 2

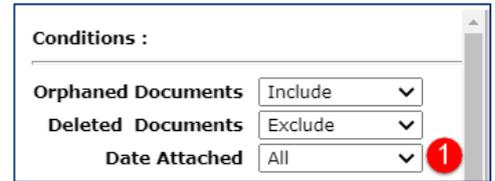
Date Attached: Only 3

Note

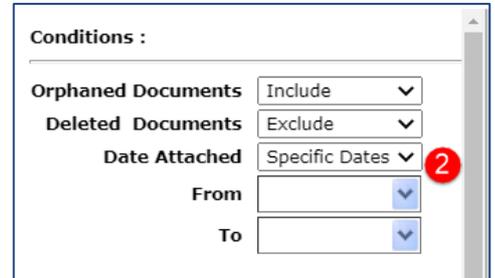
Orphaned Documents are files that were attached to a new record which was not submitted or saved

For Dates Attached

1 Select **All** if you wish to see the list of files based upon the date periods selected in the Registers folder tree



2 Select **Specific Dates** if you wish to see files within a date period based on date fields in the Register records.

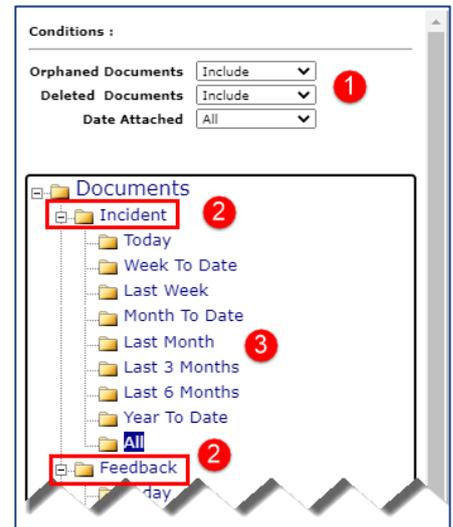


The Register folder tree/s

1 Choose your conditions (**Orphaned / Deleted** and **Date Attached** fields) for documents.

2 Expand the **Register/s** for which you have permission to view files

3 Depending upon your choice in the Date Attached field, select a **date period** or **All** to see the documents listed in the **Document Library**



Open an attached file

- 1 Click on the  to view the document
- 2 Selecting the Document ID will populate the document details panel with information about the file
- 3 Document details show when the Document ID is selected

Document Library

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 3. To delete/restore/permanently delete an attached document, check the documents and click the "Delete"/"Restore"/"Delete Permanently" button respectively.

Delete
Restore
Delete Permanently

<input type="checkbox"/>	View	Document ID	Document Name	Date Attached	Attached By	Attached To	Attached To Register ID	Size (KB)
<input type="checkbox"/>	 1	500039 2	Cheat Sheet for Line Managers (Generic)_V15.pdf	26 Apr 2017 13:53	System Manager (Manager)	Incident	3602	746
<input type="checkbox"/>		500038	Admin Cheat Sheet.docx	26 Apr 2017 13:50	System Manager (Manager)	Incident	3599	407
<input type="checkbox"/>		500037	Complaint letter.docx	18 Apr 2017 11:44	System Manager (Manager)	Incident		427

Document Name Cheat Sheet for Line Managers (Generic)_V15.pdf

Description Document - This is a change 

Attached By System Manager (Manager)

Date Attached 26 Apr 2017 13:53

Size (KB) 746

Document ID 500039

Attached To Incident Register ID : 3802

Document Review History

Date	User	Action
26 Apr 2017 13:53	System Manager (Manager)	Document attached
26 Apr 2017 13:53	System Manager (Manager)	Document first viewed
26 Apr 2017 13:54	System Manager (Manager)	Document details edited
7 Aug 2020 11:28	System Manager (Manager)	Document marked as deleted
7 Aug 2020 11:28	System Manager (Manager)	Document restored
10 Sep 2020 15:41	System Manager (Manager)	Document details edited

Document Details

- 1 Allows you to modify the description of the file, be sure to save by selecting 
- 2 Displays who attached the file
- 3 Displays when the file was attached
- 4 Displays the size of the file
- 5 Identifies the Register the document is in
- 6 Provides the record ID. Orphaned files do not a Register ID
- 7 Displays the history of who has viewed the file

Document Library

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 2. To view the document's detail, click the corresponding Document ID.
 3. To delete/restore/permanently delete an attached document, check the documents and click the "Delete"/"Restore"/"Delete Permanently" button respectively.

Delete
Restore
Delete Permanently

<input type="checkbox"/>	View	Document ID	Document Name	Date Attached	Attached By	Attached To	Attached To Register ID	Size (KB)
<input type="checkbox"/>		500039	Cheat Sheet for Line Managers (Generic)_V15.pdf	26 Apr 2017 13:53	System Manager (Manager)	Incident	3602	746
<input type="checkbox"/>		500038	Admin Cheat Sheet.docx	26 Apr 2017 13:50	System Manager (Manager)	Incident	3599	407
<input type="checkbox"/>		500037	Complaint letter.docx	18 Apr 2017 11:44	System Manager (Manager)	Incident		427

Document Name: Cheat Sheet for Line Managers (Generic)_V15.pdf

Description: Document - This is a change 1 

Attached By: System Manager (Manager) 2

Date Attached: 26 Apr 2017 13:53 3

Size (KB): 746 4

Document ID: 500039 5

Attached To: Incident 6 Register ID : 3602

Document Review History 7

Date	User	Action
26 Apr 2017 13:53	System Manager (Manager)	Document attached
26 Apr 2017 13:53	System Manager (Manager)	Document first viewed
26 Apr 2017 13:54	System Manager (Manager)	Document details edited
7 Aug 2020 11:28	System Manager (Manager)	Document marked as deleted
7 Aug 2020 11:28	System Manager (Manager)	Document restored
10 Sep 2020 15:41	System Manager (Manager)	Document details edited

Delete a document

To delete a document:

- 1 Click in the selector box
- 2 Press the delete button
- 3 The record will now display in red, which means you can either permanently delete or restore the file

Document Library

This page allows you to view, search, delete, restore documents that have been attached in the RiskMan system.
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 3. To delete/restore/permanently delete an attached document, check the documents and click the "Delete"/"Restore"/"Delete Permanently" button respectively.

Delete 2
Restore
Delete Permanently

	View	Document ID	Document Name	Date Attached	Attached By	Attached To	Attached To Register I	Size (KB)
<input type="checkbox"/>		500039	Cheat Sheet for Line Managers (Generic)_V15.pdf	26 Apr 2017 13:53	System Manager (Manager)	Incident	3602	746
<input checked="" type="checkbox"/>		500038	Admin Cheat Sheet.docx 3	26 Apr 2017 13:50	System Manager (Manager)	Incident	3599	407
<input type="checkbox"/>		500037	Complaint letter.docx	18 Apr 2017 11:44	System Manager (Manager)	Incident		427

Restore a Deleted File

To restore a deleted file

- 1 Ensure the Deleted Documents condition is set to include
- 2 Click in the selector box for the file you wish to restore
- 3 Click on restore, and the file will now display in black

Conditions :

Orphaned Documents Include

1 Deleted Documents Include

Date Attached All

Document Library

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 2. To view the document's detail, click the corresponding Document ID.
 3. To delete/restore/permanently delete an attached document, check the documents and click the "Delete"/"Restore"/"Delete Permanently" button respectively.

Delete
Restore 3
Delete Permanently

	View	Document ID	Document Name	Date Attached	Attached By	Attached To	Attached To Register I	Size (KB)
<input type="checkbox"/>		500039	Cheat Sheet for Line Managers (Generic)_V15.pdf	26 Apr 2017 13:53	System Manager (Manager)	Incident	3602	746
<input checked="" type="checkbox"/>		500038	Admin Cheat Sheet.docx 4	26 Apr 2017 13:50	System Manager (Manager)	Incident	3599	407
<input type="checkbox"/>		500037	Complaint letter.docx	18 Apr 2017 11:44	System Manager (Manager)	Incident		427

Permanently Delete a File

To permanently delete a file:

- 1 Select the check box/es of the files you wish to permanently delete
- 2 Click on Delete Permanently.
- 3 You will be asked to confirm that you want to permanently delete the files. Permanently Deleted files cannot be restored.

The screenshot shows a confirmation dialog box from 'sites.riskman.net.au' asking 'Are you sure you want to permanently delete these items?'. The dialog has 'OK' and 'Cancel' buttons. In the background, the 'Document Library' page is visible. It includes a 'Delete Permanently' button with a red '2' next to it. Below the buttons is a table with columns: View, Document ID, Document Name, Date Attached, Attached By, Attached To, Attached To Register ID, and Size (KB). Two documents are listed: 'Cheat Sheet for Line Managers (Generic)_V15.pdf' (ID: 500039, Size: 746 KB) and 'Complaint letter.docx' (ID: 500037, Size: 427 KB). A red '1' is next to the 'View' icon of the first document.

Document Library List Page functions

There are only two functions available if you wish to modify the Document Library List page

Columns may be resized by selecting the edge of the column title and dragging it left or right

Columns may be repositioned by clicking on the column label, dragging to a new position until you see the white arrows and then dropping the column label in the new position.

This screenshot shows the 'Document Library' page with a focus on column repositioning. A red arrow points to the 'Attached To Register ID' column header, which has a red '2' next to it. A white arrow indicates the column is being dragged to a new position between 'Date Attached' and 'Attached To'. The table below shows three documents: 'Cheat Sheet for Line Managers (Generic)_V15.pdf' (ID: 500039, Size: 746 KB), 'Complaint letter.docx' (ID: 500037, Size: 427 KB), and 'Complaint letter.docx' (ID: 500036, Size: 427 KB).