# - 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.

- Go to User Permissions > User Templates
   under the Administration menu
- Select the **Register** for which you wish to enable the permission

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8	User Permissions	÷	8	User Registry 🛛 🕛								
н	Manager/Staff	•	<b>6</b>	User Templates								
9	Alerts Management		8	User Profiles								
<u> </u>				Apply Template Changes								
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	Select Template: Manager (6 users)											

#### RISKMAN REFERENCE GUIDE TO THE DOCUMENT LIBRARY

- Scroll to the section in User Permissions headed Administrative
   Permissions
- Click the check box to turn on the permission Can view Document
   Library
- Select the appropriate Attach Document Permissions and save your changes

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

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	Can modify User Te	emplates	
	Can reset User Pro	files	
	Can manage Alerts		•
✓	Can view Documen	t Library	4
	Can import Item da	ata	
	Can Maintain Class	ifications	(RiskCat)
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Own	<b>~</b>		✓
Subo	rdinates 👩	✓	✓
All	•	✓	✓
	Journal Permission	15	
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## USING THE DOCUMENT LIBRARY

The Document Library is composed of three sections:

- 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

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### Conditions

For Orphaned and Deleted Documents:

- 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
- Select ONLY if you wish to see ONLY orphaned or deleted files



#### i) Note

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

## 

#### For Dates Attached

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

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

- Choose your conditions (Orphaned / Deleted and Date Attached fields) for documents.
- 2 Expand the **Register/s** for which you have permission to view files
- Depending upon your choice in the Date Attached field, select a date period or All to see the documents listed in the Document Library

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Deleted Documents	Exclude	~	
Date Attached	All	<b>~</b> 1	

Conditions :				*
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## Open an attached file

- Click on the <sup>(1)</sup> to view the document
- 2 Selecting the Document ID will populate the document details panel with information about the file
- **6** Document details show when the Document ID is selected

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

- lacebox Allows you to modify the description of the file, be sure to save by selecting lacebox
- **2** Displays who attached the file
- Oisplays 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
- Displays the history of who has viewed the file

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### **Delete a document**

To delete a document:

- Click in the selector box
- 2 Press the delete button

SThe record will now display in red, which means you can either permanently delete or restore the file

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### **Restore a Deleted File**

To restore a deleted file

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

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## Permanently Delete a File

To permanently delete a file:

• Select the check box/es of the files you wish to permanently delete

**2** Click on Delete Permanently.

• You will be asked to confirm that you want to permanently delete the files. Permanently Deleted files cannot be restored.

sites.riskman.net.au says Are you sure you want to permanently delete these items?										<b>C</b> RLDatix <sup>-</sup>					
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## **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.

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