C RLDatix

- Alert Management -

FOR RISKMAN VERSION 2010

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WHAT DO ALERTS DO?

Alerts are the backbone of your system – they orchestrate all the workflows that you require RiskMan to perform. This includes things like sending records to the right people at the right time; tracking due dates and sending reminders, and much more.

→ How to access Alerts

You can access Alerts by navigating to *Administration > Alerts*. This will take you to your list of previously configured alerts. To create a new alert, select the target register (eg. Incidents, Risk) and click on the **1** icon.

DETAILED OVERVIEW

Before we even get into the nitty-gritty, there is one point to make clear: Alerts are not emails!

On their most basic platform, the Alerts system is designed to grant users permission to certain records, based on the criteria you specify. Whether or not an email is sent when an alert is triggered is an *option* for an alert.

Having said that, we tend to talk about Alerts having 6 main purposes. Here we go.

Alert Type: To notify a user that a certain type of record has been entered

The most obvious use of Alerts is to make sure people who need to know are in the know. These alerts inform users that there is a record in the system that needs their attention. For example:

- Notify the CEO when a major or extreme incident is recorded
- Notify the relevant Department Manager when a complaint issue is raised regarding their department
- Notify a user when a control is assigned to them in a Risk

There is an extension to this type, in which, instead of notifying a user to each individual record, instead a Digest can be sent. More on that later.

Alert Type: Restrict what a user can see when they open a Register

Example: You have two users who are responsible for posting Incidents; the WHS Manager and the Director of Nursing. When each of these users opens the Inbox, they can see all of the Incidents from their facility. Each user requests that they not see the other's Incidents; they'd rather only see their own.

If you grant a user permission to see the Incident Inbox, they will see <u>all</u> the records which match their User Profile Site/Location restrictions *(this applies to all Registers as a general rule)*. Sometimes, this is not enough. This is where alerts can be used to control what a user can see.

The solution is to **create an Alert** for each of those users. The Alert for the DON will trigger for clinical incidents. The Alert for the WHS Manager will trigger for everything except clinical incidents, for the sake of the example.

The next step is to change each person's Site/Location settings in their respective User Profile:



Tick on **Show only "Alerted" Incident items in Inbox**. Now, each user will only see the incidents that concern them when they open the Inbox.

In Note

You can also use this method for restricting a user's reporting capabilities.

Alert Type: Remind a user that something is due soon, or is now overdue

Alerts can be used to track all kinds of time-based scenarios, and remind people when you want them reminded.

Some hypothetical examples include:

- Complaints in the Feedback register need to be closed within 30 days. If, 25 days after initial entry, a complaint has not been marked as 'Closed', send a reminder to the personal responsible to let them know the deadline is approaching.
- Company policy dictates that all incidents must have investigations at least started no more than 7 days after we were made aware of it. If, after that 7th day, there are still no investigations entered, send a reminder email to the responsible manager every 3 days until they actually do it.
- Remind the person responsible for the review of a Control in the Risk Register that they have not yet performed that review, and the due date for the review has now passed.

...and so on. Remember, reminder alerts are always based on a date field from the Register in question. You need to define three questions before you create a reminder alert:

- What specific situation are you reminding somebody about?
- When should you start reminding them, and
- Once you've started reminding them, how often do you want them to be reminded until they complete the action?

You can then go and create your alert.

Alert Type: Acknowledging that something has been completed

The system can generate acknowledgement emails automatically, based on the criteria you specify. Examples include:

- When a user submits an incident, send them an acknowledgement email, which thanks them for entering it. The email may also describe what will happen next, as well as some instructions on what the user can do to monitor the progress of the incident.
- When an incident is marked as closed / investigations completed, send an acknowledgement email back to the original reporter to thank them for taking the time to enter it, and what happened as a result of them doing so (closing the loop!!).

- When a complaint in the Feedback Register is marked as closed, send an acknowledgement email to all the users who contributed to the resolution, thanking them for their effort
- When a quality activity is marked as being completed, send an acknowledgement email to the users who contributed which includes the initial results of the activity

Alert Type: Counting the number of occurrences of a certain event

A 'Threshold' alert can be setup to count the number of occurrences of a certain type of event; for example, staff manual handling injuries.

When the number of staff manual handling incidents surpasses the tolerable level that you set, within the timeframe that you stipulate, the nominated user(s) will be notified.

For example, if you have more than 4 manual handling incidents within a 30 day period.

Threshold alerts are essentially the same to setup as notification alerts, with the added information of your tolerance within the given time frame.

Alert Type: Pipeline Processes

Pipeline Processes allow you to create a new record in a different Register, or a new record in the current Register, when the conditions that you define are triggered. The simplest examples include:

- A user is entering an incident. If they answer 'Yes' to the question 'Have you identified a potential new risk?', a new record is created in the Risk Register. This new risk might contain some of the information from the incident that was just entered.
- A user is performing the follow up of a complaint. They answer "Yes" to the question "Will this result in a quality improvement activity?". This creates a new quality activity, ready to be followed up on.
- Entering an incident where an inpatient had passed away could trigger a new record in the Mortality Audit Register

There are many possibilities for using Pipeline Processes; talk to us about any ideas you have!

Alert Types – In Summary

Alerts will do the following for you:

- **Notify** users when certain things happen
- Restrict what a user can see when they open a Register
- Remind a user that something is due soon, or is overdue
- Acknowledge to a user that something has been done or completed
- Count the number of occurrences of a certain event
- Pipe information from one Register to another

Of course, this is a fairly high-level summary, and there are plenty of nuances and different configurations that we use every day. This guide explains the meaning behind all of the settings when configuring alerts. Please use this guide in conjunction with the **Alerts Example Supplement** document, which provides several examples of different types of alerts.

CREATING ALERTS

The Alerts list page

The Alerts list page displays all of the alerts in your system, including useful information such as the status of each alert, who created it and when, who last modified it and when, and so on.

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- Select the relevant register that you want to create an alert for (incidents, feedback etc.)
- 2 Click on the II icon in the toolbar to create a new alert
- S Click on the blue ID Number to view and edit an individual alert
- Click this icon to delete an alert this cannot be undone!

(i) Note

The Alerts list page is just like other listings pages, where you have the ability to group by columns, filter, use your Selection Settings and set your column widths.

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Modifying alert properties without opening the alert

- Double click on a row to modify the name, description, and current status of an alert
- 2 Click the tick icon to save your changes, or the cross icon to cancel

Introduction to the Alert Edit page

This is what alert page looks like. We'll just have a look at how the page is structured first:



• Each of these **icons** represents a different group of settings for your alert. The icons displayed here will depend on the options that you choose during the setup of your alert.

• This is where the content and options for each group of settings appears. By default, you will land on the **Introduction** page when you create a new alert. There is some basic information on this page. If you no longer wish see the Introduction page when you create a new alert, check the box labelled **Skip this introduction in future** underneath the page heading.

• These are your **save** and **cancel** icons. Clicking either will result in you being taken back to the alerts list page.

Alert Details

0	My	Workspace 🔹 M	lanagement 🔹	Administration •	Data Report	s ▼ Hel	p Log Out	USER: System Manager (Mar
8	•			Inc	ident Ale	rt Edit		
INTRO		If you nee	d further informat	ion, please refer to the A	lert Management (Details Guide in the H Support.	ielp menu. If you encou	nter difficulties or errors, please contact RiskMan
DE	ETAILS	Alert Name	WHS	Manager - Staff Injuries		1	Current Alert Statu	
R		Purpose / Description	: Sends mana	all staff injuries to the V ger	ins (2	Alert ID: Alert Information A new Alert that has r	New Alert not yet been saved.
RECI		Alert Catego Please select folder for this	a suitable	🗹 길 General		3		
sch	HEDULE	turn, you car these folders columns on y	as our Alert	🗆 퉲 Special				
PRO	DCESSES	Management enabling you group, and fi list of alerts values.	bage, to sort, lter your by these					
		Especially us systems whe are a large n alerts.	eful in re there umber of					

• Alert Name: Give your alert a meaningful name. If you anticipate your system will have many alerts, it is advisable to come up with a standardised naming convention.

Purpose / Description: Enter a meaningful description that clearly outlines the purpose of this alert. The more information you include, the better – as sometimes other users will be viewing alerts, and it should be easy for them to identify exactly what an alert does.

• Alert Categorisation: If you anticipate having a lot of alerts, the categorisation can help you sort your alerts more effectively. The folders that you see in this section are based on a list in list and codes maintenance (see below image)

4 Alert Status: This is the on/off switch for the alert.

Alert Categorisation

You can modify the folders that appear in the Alert Categorisation section if you have permission to List & Codes Maintenance:

•	Management 🔹	Administration 🔻	Reports 🔻	Help 🔻	Log Out			
		List	& Codes	Mainte	enance			
	List Name:	level				-	Lists for Register:	
		List Caption			A	Actu	al Listname	
		(Alert) Level 1			A	lert	Category	
		(Alert) Level 2			A	lert	SubCategory	
		(Alert) Level 3			A	lert	SubSubCategory	
		(Risk Register) Catego	y 2nd Level		F	laza	rdSubCategory	
		(Risk Register) Categor	y 3rd Level		ŀ	laza	rdSubSubCategory	
		(Organisational Structu	re) Maternity Ser	vice Level	N	/lati	evel OraStructure	

• Configuring these values will allow you categorise your alerts.

🤹 😜 r	My Workspace * Management * Administr	ation * Data Reports * Help Log Out	USER: System M	anager (Mana	iger)	Alert Categorisation 🔲 🏭 General
0	List & O	Codes Maintenance	Ĩ	۰ <u>+</u>		Please select a suitable folder for this alert. In turn, you can display these folders as columns on your Alert Management page.
	List Name: (Alert) Level 1 [AlertCategory]	Lists for Register:	•		SCHEDULE	filter your list of alerts by these values. Especially useful in systems
Alert Level 1	*	Sort Order	Ψ 	0	PROCESSES	where there are a large number of alerts.
General			- 10	畲		
Workflow			100	⑪		
Special			999	⑪		
Createriner						

• You could then use your **Change Columns** function on the alerts list page to display these as columns in the list, meaning you can sort, group, and filter your alert by the values you have assigned:

۵	My Workspace 🝷 M	nagement • Administration • Data Reports	• Help Log Out	USER	: System M	Manager (Manage	er)
+ Inci	dent 🔹 🚺	Alert Ma	nagement	🌣 🗉 🕹	1		
Drag	Change Columns					×	
ID		Change Columns		Cancel	Save	<u>^</u>	
	This pag	e allows you to choose which columns of information you w	ould like to see on your Alert Manage	ement page. Display 'Advanced' Colu	🔞		
	#	Field Label				1 223	
No dat						1 833	
9 Crea		ID				1000	
		Name				1000	
		Туре				1 888	
		Description				1 1000	
		Alerts To				1 1998	
		Is Enabled				1 1000	
		Created By				1 888	
		Created On				1 1000	
		Last Edited By				1 1000	
		Last Edited On				1 888	
	V	Times Activated				1 1000	
		Last Activated On				1 888	
		Level 1				1 1000	
		Level 2				1 1000	
		Level 3					
		Alert Method					
		Last Date Checked					

Alert Rules

The Rules page contains the 3 **Alert Methods**, and the various **Settings** that can be configured for each method:

My Wo	Torkspace - Management - Administration - Data Reports - Help Log Out		ager
8	Incident Alert	Edit	
	Act Net Net Definition This setting determines when the items should be checked, and thus the alert triggered. Click the setting you want to ite select it. Berlin in the set of the setting the items and the item	Bettings 20 Statings 20 St	

Alert Method	Explanation
Check each item when it is saved	When the user enters a new item, or when an existing item is modified, the alert will check each item, and trigger if all the conditions are met. This is the most common method.
Scan all items periodically	The alert scans all items at the interval you specify (e.g. Every 5 days), and triggers for each item that matches the conditions you specify. Usually used when you are creating a 'reminder' alert.
Trigger the alert once a threshold has been exceeded	The alert will monitor for the type of item that you specify, but will not trigger until the count of that type of item has exceeded your pre-determined threshold within a given timeframe.

Settings for each Alert Method

There is some overlap with the settings that are available for each alert method.

Settings displayed for Check each item when it is saved:



Settings displayed for Scan all items periodically:



Settings displayed for Trigger the alert once a threshold has been exceeded:



Alert Conditions

8		
	Incident Alert Edit	
6	Conditions	
INTRODUCTION	Here you need to define the conditions which must be met in order for the alert to trigger. You can add as many conditions as necessary.	
i	The 'Test Conditions' button will tell you how many existing records there are which match the conditions you have added.	
DETAILS	Please enter a Descriptive name for these conditions: Eg. Staff mathematic injuries; Risks with overdue status, etc	
RULES	The focus of this alert is Just Incidents 2 - Select to add a related filter for 5 -	6 Test Conditions
CONDITIONS	Start typing 3 Id name here (Behaviour) First name	
	(Behaviour) Gender	
RECIPIENTS	(Behaviour) Instigator role	
	(Behaviour) Known to AODS?	
SCHEDULE	(Behaviour) Medication adminis	
60	(Behaviour) Medication adminis	
PROCESSES	(Behaviour) Patient identifier #	
	Make wider	

This is where you will add the conditions required for your alert to trigger.

• **Conditions name**: Enter a name for the conditions you are building/have built, for example "All patient falls at Acacia Private". This information will be used elsewhere in the system in future.

9 Focus: Choose whether the conditions you need come from the main form, or the main form and a sub form. More information on this in the alert examples supplement.

• Fields: These are all of the fields you can test, based on the choice you made in •. Start typing the name of a field to locate it.

○ Conditions: Drag the field from **●** to this grey 'drop zone', to configure the tests you want to perform.

9 Related filter: Add additional filter criteria from another sub form. Usually only used in very complex alert conditions. See the alert example supplement for examples.

6 Test Conditions: Click this button to test your conditions. The system will look at the register this alert is for, and tell you how many matching records already exist.

Creating alert conditions: The basics

For the purpose of explaining the basics of alert conditions, let's assume that the alert we are creating is to send all staff injuries to the WHS manager in the Incident register.

You must always carefully consider which information you need to have in place on the (incident) form that would make your alert trigger. We would recommend opening a blank incident entry form to assist identifying which fields will need to be tested. In the case of our example, we've decided we'll need to create conditions for two fields:

Who Was Affected? The subject affected is a* Patient affected type *	Patient / Client Worker Relative / Visitor Non-Individual / Environment	
Level of harm sustained *	Initial Assessment	V

We want to test that the subject affected was a **Worker**, and that the level of harm sustained was **Injury/illness**.

We need to create a condition for each of those fields.

Adding conditions

Conditions work like this:





you need, click and drag it to the

Once you have identified the name of the field you need to test, start typing that field name in the filter box. The list of fields will show the fields that match what you type.

Once you find the field

	Subject affected	+
Patient affected type	Subject anected	
Subject affected	45	

drop zone:

Once you have the added the field in the drop zone, you need to select the type of test you need to perform:



Then you need to select the value that you want for your test. Click **select an option**:



The values from the field you have select will appear. Choose the value you are testing for (**Worker** in our case):



When trying to add a filter condition with a large list, you can start typing the value you want, and the system will display all the matching list values:

/here	Site/Program is equal to	[select an option]
		There are 448 items in this list. Click here to load all items.
Where	Site/Program is equal t	o [select an option]
		townsyl
		Townsville In Home Support
		Townsville In Home Support Townsville ICA Post School Services Townsville Learning And Lifestyle Townsville Post School Services Endeavori Industries Townsville

At any point, you can opt to click the **Click here to load all items** option. If you opt to retrieve all the values in a larger list, there might be a few seconds' delay. However, a "loading" icon will be displayed during that time, so that you know the request is being processed.

We then have to add our second condition. Follow the same process to find the field you need to test:

_	
Where	Subject affected is equal to Worker
And	Level of harm sustained is equal to Injury/illness
\sim	+

Note that for each subsequent field you add as a condition, there is a button at the start of each which contains **And** and **Or** (highlighted above). This allows you to stipulate whether <u>both</u> conditions need to be met for the alert to trigger, or if <u>either</u> of those conditions can make the alert trigger (click the button to change between And and Or).

So, for our example, the alert will <u>only</u> trigger if the subject affected was a **worker**, and the level of harm sustained was **Injury/IIIness**.

Test name	Description
Is equal to	You want the stated value to be in this field
Is not equal to	You do not want the stated value to be in this field, but any other value is fine
Is empty	The field you are testing contains no data
Is not empty	The field you are testing does contain data
Contains the keyword	The field you are testing contains a keyword or particular string of text
Does not contain the keyword	The field you are testing does not contain a keyword or particular string of text
Is one of	More than one value being present in this field could satisfy this test
Is not one of	Any of these values not being present in this field could satisfy this test
Is less than	Can only be used on date, time, and numeric fields
Is greater than	Can only be used on date, time, and numeric fields
Is less than or equal to	Can only be used on date, time, and numeric fields
Is greater than or equal to	Can only be used on date, time, and numeric fields

What types of tests can be conducted?

Test examples

Is equal to	Incident Day Name is equal to Monday		
Is not equal to	Specific location is not equal to Car park		
Is empty	Closed on is empty		

Is not empty	Date of birth is not empty	
Contains the keyword	Action taken at time contains the key	vord police
Does not contain the keyword	Occupation does not contain the keyw	ord nurse
		Filter: Enter keywords ✓ Check all × Uncheck all
ls one of	Specific location is one of 4 selected	☐Meeting room ✓Office
		☑Reception
		Staff lunch room
		⊡Other ✓
		Filter: Enter keywords ✓ Check all × Uncheck all
		□Tuesday ^
Is not one of	Incident Day Name is not one of 2 selected	⊡Wednesday ⊡Thursday
		□Friday
		Isaturday
		✓Sunday

Multi-test conditions

There will be times where you want to create conditions with more than one test. There are two main scenarios:

- Your condition tests one field for more than one possible value
- Your condition comprises of two or more different fields being tested

Testing **one field for more than one possible value** is straightforward. Select the field you wish to test, add it to the drop zone, and change the test type to **is one of**:

	is not empty
	contains the keyword
	does not contain the keyword
	is one of
	is not one of
Where	Incident Day Name is one of [select some options]
	+

You can then go and select multiple values from the list:

Where	Incident Day Name is one of 5 selected				
		Filter: Enter keywords ✓ Check all × Uncheck all	0		
	(€Monday			
		Iuesday			
	~ ~ ~	✓Wednesday			
	1				
		✔Friday			
		■Saturday	-		

If you wanted to achieve the opposite, you could use the **is not one of** test (usually because it's more efficient):



When your condition requires the **testing of two or more fields**, there are two distinct scenarios. The first is when that condition is the only one you require for your alert.

Use the **And/Or** button to determine whether <u>all</u> tests must be passed, or whether just one could satisfy the condition:

Where	Subject affected is equal to Worker
And	Primary incident type is equal to Manual task
\sim	+

In the above example, we've chosen **And** to ensure that the alert will not trigger unless <u>both</u> of the tests we have added are passed.

In a lengthier example, we have said that the alert will only trigger if <u>all</u> of these tests are passed:

Where	Subject official is equal to Patient / Client
where	Subject affected is equal to Patient / Client
And	Primary incident type is equal to Behaviour
And	Ward/Unit is equal to Emergency Department
And	(Behaviour) Type of aggression is equal to Verbal aggression
And	(Behaviour) Towards is equal to Toward a person
And	(Behaviour) Security attended is equal to Yes
	+

But what if we wanted the alert to trigger based on two unrelated conditions, and each of these conditions tested multiple fields?

Let's use the following example: We want this alert to trigger for **either**:

- Worker incidents that happened on Saturdays and Sundays, OR
- Relative/Visitor incidents that happened in the Emergency Department

We have two distinct sets of conditions there; each condition has its own sub-tests.

In this situation, you need to create two separate conditions in the drop zone. Click the button in the drop zone to do this:



Note the new darker-blue box, with its <u>own additional drop zone</u>. This is where you can go and add the tests which make up the first condition listed above in our example:

Where		
		Subject affected is equal to Worker
	And	Incident Day Name is one of 2 selected
		+
		+

You can now click the outer-most drop zone to add a second distinct condition. Note the new **And/Or** button:

Where		
		Subject affected is equal to Worker
	And	Incident Day Name is one of 2 selected
		+
And		+
		+

Once we add in the tests required for our second, unrelated condition, it looks like this:

Where		Subuct officient is equal to Werker
		Subject affected is equal to worker
1	And	Incident Day Name is one of 2 selected
\checkmark		+
Or		Subject affected is equal to Relative / Visitor
	And	Ward/Unit is equal to Emergency Department
7		+
		+

The image above uses red boxes to denote that there are 2 completely separate conditions for this alert; each condition has several tests which must be met before the alert could trigger.

There is the ability to make even more complex conditions (which contain conditions within conditions), however we have provided examples of these in the alert examples supplement.

Deleting tests

Deleting tests is simple. When you hover your mouse over any test, you will note the \mathbf{x} icon at the end of the row:



Click the \mathbf{x} icon to delete the test. You will not be prompted to confirm this action.

Testing data stored in sub forms and related tables

By default, the list of fields that you can test from the register your alert is for will not include fields from any sub forms or related tables.

Examples of sub forms:

onsequences							
Add Consequence							
Consequence			Impacts	on this Corpo	rate Objective		
Increase in the number of banana-peel related slips, trips and falls							×
ntrols							
ntrols Add Control							
Add Control Control Control D	Control Effect	Effective Date	Last Reviewed By	Last Reviewed On	Assessment	Next Review By	Next Review On

Alert Management

Example of related tables:

Journals							
Add New Journal Entry							
Journal Type:	Further Action Required	DateStamp:	28 Aug 2016 14:09	Reference:			
Description:	Please follow up with the external cont	ractor to arrange a site visit fo	r repair work to be carried out.				
Follow Up By Date:	15 Nov 2016	Item Actioned:	No Action	Follow Up Allocated To:	System Manager (Manager)		
Edit Delete Created By: Manager New Unsaved Journal Entry							

If the purpose of your alert included testing and triggering based on the information contained in these places, you can re-generate the list of fields available for testing by choosing the appropriate option in this drop down box:

Start typing a	a field name here	
(Action)Action	ID T	
(Action)Action	Description	
(Action)Costs (\$)	
(Action)Person	Responsible for	
(Action)Person	Responsible for	
(Action)Date Pe	erson Responsib	
(Action)Outcom	ne measure	

In the above example, we have decided we want to test both fields from the main form, *and* the information contained within the **Actions** sub form. The fields from the Actions sub form will appear at the bottom of the list of all fields. The principles of creating filters are exactly the same as we have learned so far.

Adding time-based conditions for reminder alerts

When you are creating a reminder alert, one of the most crucial things to add is a condition which decides **when** the reminder should occur (or begin). This is always based on a date field:



When you have selected the **alert method** of **Scan all items periodically**, every date field from the register your alert is for will have a duplicate in the list, with "(Periodic)" appended to the label text.

Alert Management

Add the (Periodic) duplicate field to the drop zone to create your desired test.



If you wanted to remind the recipient that the task was **due soon**, you would add a condition for the alert to trigger **prior** to the date listed in the Task Due Date field:



If you wanted to remind the recipient that **today was the due date** of the task, you would add a condition for the alert to trigger **on the date** in the Task Due Date field by using zero:



If you wanted to inform the recipient that the task was **overdue**, you would add a condition for the alert to trigger **after** the date listed in the Task Due Date field:

Where	Task Due Date (Periodic) Days Since >= 3

Note: How frequently the recipient is reminded via email is determined in the Schedule options.

Testing your alert conditions

Once you have configured the conditions of your alert, you can test them to see if you are on the right track. Click the **Test Conditions** button:

TÌ	e focus of this alert is Just Incidents		· Select to add a related filter for	* Test Conditions	
	affe	Where	Subject affected is equal to Worker	1	
	Patient affected type Subject affected		+		
	Take a statement from affected wo				

After a brief pause, the system will tell you how many records <u>already exist in the system</u> that match your alert setup. It will also list the ten most recent records by ID number that match your alert setup. This can be useful to check if the alert will trigger for the types of records you expect it to.



Alert Recipients

There are several ways that you can determine who the recipient(s) of your alert should be, but essentially it comes down to whether:

- The recipient is <u>always</u> going to be the <u>same person</u> (or people), or,
- The recipient is going to be different every time

So will the recipient for the alert be static, or dynamic?

1	My	Workspace 🔻	Management 👻	Administration 👻	Data Reports 🔻	Help	Log Out		USER: Sy	stem Manager (Manager)
	0				Incide	nt Ale	ert Edit			
	VITRODUCTION DETAILS DETAILS DETAILS CONDITIONS RECIPIENTS SCHEDULE PROCESSES	Add Typ Add trigg Sele Sele Sele Sele	a specific user as a rec e a name to search a user who appears in ers this alert ct a user category t a user category t a user named in a fiel ect a field that contains a group of recipients	ipient the Review History for ea d a Username	v the record that v v	Ret Andrew_	cipients mgr To d recip	3 delete an alert recipient, click the rubbi pient name/type will be crossed out. recipient will be removed fr Clicking the icon again will car	sh bin icon at the right. The hen you save the alert, the om the list. cel the delete.	Ċ.

• Static recipients: When the recipient of your alert will be a specific user every time, search for that user here.

Opynamic recipients: There are multiple ways that you can automatically determine who the recipient of the alert should be.

• **Recipients:** This is your actual list of alert recipients. Note that it is possible to have both static and dynamic recipients in an alert.

Adding static recipients

Adding static recipients is simple. Simply start typing the name of your intended recipient, and the system will narrow down the number of matches as you type:

grieve			-	
User Display Name	Username	Email		
Amy Grieve	DDHHS-LineMgr3			
Amy Grieve	DDHHS-Reporter3			
Amy Grieve	DDHHS-SME3			

Click on the desired user and they will be added to the **Recipient List** on the right hand side of the page:

Add a specific user as a recipient Type a name to search	Amy Grieve		節
Add a user who appears in the Review History for each record that triggers this alert Select a user category	ス	Note: To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list. Clicking the icon again will cancel the delete.	

Repeat as required to add additional recipients.

Adding dynamic recipients: Users listed in the Review History of the record

Using this option automatically grabs the name of a certain type of user listed in the **Review History** of the record that has triggered your alert. Most choices in this list correspond to users recorded in the Review History, however some will start to look up the chain of management as well (if this feature is used in your system).

Review	History		Add a user who appears in the Review History for each record that triggers this alert
Date 🔺	User +	Notes	The user who originally reported the record
14 Aug 2016 13:58	System Manager (Manager)	Created the incident item.	The nominated line manager(s) of the user who originally reported the record
14 Aug 2016 13:59	Default, Mary (default)	User Alerted and Email SENT. Alert ID: 2 🔫	The nominated line manager(s) of the line managers of the original reporter
14 Aug 2016 13:59	Homer Simpson (Homer Simpson)	User Alerted and Email SENT. Alert ID: 2	Any user whose name appears in the Review History
17 Aug 2016 16:37	System Manager (Manager)	Unposted incident item edited.	Any user who has ever edited the record
17 Aug 2016 16:37	System Manager (Manager)	Incident item posted.	Any user who has ever edited the record, except the user who edited the current version
19 Aug 2016 14:57	System Manager (Manager)	User Alerted and Email SENT. Alert ID: 1	The user who edited the version of the record that triggered this alert
28 Aug 2016 16:34	System Manager (Manager)	Most recently viewed.	×

Selecting one of the values from this list will add it to the list of recipients on the right hand side of the screen:

Add a specific user as a recipient Type a name to search	Amy Grieve The user who originally reported the record	Ш Ш
Add a user who appears in the Review History for each record that triggers this alert Select a user category	Note: To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list. Clicking the icon again will cancel the delete.	

Adding dynamic recipients: When the intended recipient is whichever user is listed in field in the record

Using this option automatically grabs the name of a user listed in a field from the record that triggered the alert.

Investigated by	Andrew Martin		Alert a user named in a field Contact Phone or Email	
			Investigated by Reporter's Email Username	

Selecting one of the values from this list will add it to the list of recipients on the right hand side of the screen:

Add a specific user as a recipient Type a name to search	User(s) listed in the "Investigated by" field	Ŵ
Add a user who appears in the Review History for each record that triggers this alert Select a user category	Note: To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list. Clicking the icon again will cancel the delete.	
Alert a user named in a field Select a field that contains a Username		

Adding dynamic recipients: When your recipient is the person in a particular group or role

This functionality might not be in use in your configuration of RiskMan.

Using this option performs a lookup into your organisation's list of roles or positions. Depending on how your system has been specifically configured, this list of roles or positions might be maintained via List & Codes Maintenance, or through a separate Organisation or Roles register. This functionality can also allow you to define a group of people via an SQL statement. Contact RiskMan Support for further information.

Parameters

Some of the options in this field configured in your system might require that you define a parameter before you can add the recipient group to the alert. This is clearly shown when you browse the list of groups:

Division Owner	-		
Group Name		Parameter Help	
HHS Groups		Please enter the name of the group	
Facility Groups		Please enter the name of the group	
Unit/Department Owner		No parameter required	
Unit/Department Secondary Owner		No parameter required	
Division Owner		No parameter required	
Division Secondary Owner		No parameter required	
Service/Stream Owner		No parameter required	

Groups with no parameters: Select the desired value and click the Sicon. The recipient will be added to the list of recipients on the right hand side of the page.

Add a group of recipients	Division Owner - Parameter:null	節
Division Owner	Note: To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list. Clicking the icon again will cancel the delete.	

Groups where a parameter must be defined: When you select a group where a parameter must be defined, an extra text box will be shown. Add your parameter to this box, then click the S icon. The recipient will be added to the list of recipients on the right hand side of the page.

Add a group of recipients	Facility Groups - Parameter:Gold Coast University Hospital	節
Pacinity Groups	Note: To delete an alert recipient, click the rubbish bin icon at the right. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list. Clicking the icon again will cancel the delete.	

Deleting recipients

Deleting recipients is simple. To delete an alert recipient, click the **m** icon to the right of the respective recipient. The recipient name/type will be crossed out. When you save the alert, the recipient will be removed from the list.

Clicking the icon again will cancel the delete.

Facility Groups - Parameter:Gold Coast University Hospital Amy Grieve Default, Mary Chris Neilsen	自自
--	----

Alert Email

If, in the **Rules** options of your alert, you selected the option **Send an email every time the conditions are satisfied**, you will see the **Email options**:



• Email Subject: Enter the text that you want to have shown in the subject line of the email.

2 Email Body: Enter the text that you want to have shown in the body of the email.

• Formatting Tools: Use these "What you see is what you get" (WYSIWYG) tools to make your email look great.

• **Field Substitutions**: Similar to a mail merge function in MS Word, you can automatically grab information from the fields in the record triggering the alert and have that detail auto-populated into the email.

9 Email Link: Place a link in the email so the user can click it to open the record that triggered the alert.

• Add sub form table: Use this tool if you want to add the information from a sub form to the body of the email.

Edit mode tabs: Switch between different edit modes for more control, or to test the functionality of your email (to test hyperlinks, for example).

Email Formatting

The WYSIWYG tools are very similar to using word processor formatting tools. This image summarises the various formatting you can apply to your email:

🐰 🗇 🛍 🛸 🖉 🕸 X² X₂ 🗄 🔠 🧧 🥶 🚱 🚱 📾 🖬 🕶 🗖
Normal 🔹 Arial 🔹 2 (10pt) 🔹 B I U S 🗄 🗄 🗄 🖉 🕶 A 🔹
You can have different fonts and fONT SIZES in your email Don't forget bold , <i>italics</i> , <u>underline</u> , strikethrough , and foreground and <mark>background colours</mark> .
You could have lists:
1. Numbered Lists 2. <mark>Bulleted</mark> Lists
 You can also increase the indent of text and lists, and also, You can add <u>links to web pages, email addresses, documents, your intranet, etc</u>
You can also Create your own Tables
And add All the content You like
Design HTML Preview

Dynamic email content

Alert emails don't just have to contain static content. You can draw information from the record that triggers the alert, and automatically add that information into the email at various points. For example, if we wanted to create an alert that sent an acknowledgement email to the person who reported a record, it might look like this if I we wrote it ourselves:

Dear Mary

Thank you for reporting incident 177 on 15 Sep 2016. It has now been sent on to the appropriate manager for follow up.

Some of that information could automatically be drawn from each incident when the alert is triggered:

Dear (Reporter's name)

Thank you for reporting incident (Incident ID number) on (Date the incident was entered). It has now been sent on to the appropriate manager for follow up.

To add these field substitutions to your email

Compose your email as you ordinarily would. When you arrive at content which can be populated by the information in the incident record, search for the related field in the **Field Substitution** box:

You can add your chosen field to the email Subject	Email Subject An incident has occurred						
or body - it will be inserted where your cursor is							
currentiy. Choose a Field:	Email Body						
	📈 🗇 🖻 💼 🗠 🗠 🗠 🛛 X²	X₂ != :=					
Did you report the incident at the time?	ial	▼ (Font Size)					
Feedback given to report - Method provided							
Feedback given to report - Other method							
Feedback given to report er - By whom							
Reporter's name							
Reporter's position							
Who did you report the incident to?	v						

Select the field containing the content you want auto-populated where your cursor is in the email subject or body. Click the respective button to add the content where you want it to go:

You can add your chosen field to the email Subject	Email Subject
or body - it will be inserted where your cursor is	Thanks for reporting
currently. Choose a Field:	Email Body
	📈 🗍 🛅 🛅 🛸 🗠 🕸 X²
Reporter's name 🔹	Neuronal Avial
The fields available above are based on the Alert	Ariai
Focus selected on the Conditions page.	Dear
Add Selected field to the subject	Deal
Add Selected field to the body	

The field will be added to your form within [square brackets]:

Thanks for reporting	
mali Body	
X D 🗅 💆 🖘 🔗 🂖	X ² X ₂ = ;= = = = 🔂 🔂 🖽
Normal 🔻 Arial	▼ (Font Size) ▼ B I
Dear [NotificationName] 🗲	

What is contained in the square brackets is the <u>database field name</u>, **not** the label you are used to seeing from the form – don't panic!

Using more field substitutions, we have configured our email to look like this:

Email Subject										
Thanks for reporting	incident #[Disp	layID]								
Email Body										
X D B 🖬 <	> ~ 3	$\mathbf{X}^{2} \mathbf{X}_{2} \mid \stackrel{1}{\Xi} \stackrel{2}{\Xi} \mid \stackrel{1}{\Xi}$	e e 🔒 🔒	🎟 🖌 E	Q 👬					
Normal 🔻	Arial	✓ (Font	Size) 🔻 🖪	ΙU	S ≣	Ξ Ξ	•	<u>A</u> •		
Dear [NotificationNa	amel									
Thank you for enter	ing incident#[D	isplayID] on [Notificat	onDate]. This ema	il has been	sent throu	ugh to the	appropria	ate mana	ager for follow up.	
For your information	n, the key detail	s were as follows:								
Summary: [Descript	ion]									
Incident affected: [[ŋ	cidentInvolved	l								
Initial Severity: [Out	come]									
Design	HTML	Preview								

Now we want a link to be inserted that the user can click on to open the incident. To do that, we put our cursor where we want the link to go, and click the **Add email link to body** button:



Once we modify how the link text appears, and apply some other formatting, our email looks like this:

mail Subject Thanks for reporting incident #[DisplayID] mail Body Normal → Arial → (Font Size) → B I U S = = = @ A → Dear [NotificationName] Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up. For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	
Thanks for reporting incident #[DisplayID] mail Body Normal ↓ Arial ↓ (Font Size) ↓ B I U S E E E P V A ↓ Dear [NotificationName] Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up. For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Email Subject
mail Body Normal Arial ((font Size) B I U S E E B P A C Dear [NotificationName] Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up. For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Thanks for reporting incident #[DisplayID]
Normal Arial (Font Size) B I	Email Body
Normal Image: Arial Image: Fort Size) B Image: Imag	💥 🗇 🖻 💁 🔗 膨 X' X, Ξ ☷ ፸ ፸ 🔂 🚱 🎟 ▾ ┖ ຊ 🔛
Dear [NotificationName] Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up. For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Normal \bullet Arial \bullet (Font Size) \bullet B I U S $\Xi \Xi \exists $ $\Psi \bullet A \bullet$
Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up. For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Dear [NotificationName]
For your information, the key details were as follows: Summary: [Description] Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Thank you for entering incident #[DisplayID] on [NotificationDate]. This email has been sent through to the appropriate manager for follow up.
Summary: [Description] Incident affected: [Incidentinvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	For your information, the key details were as follows:
Incident affected: [IncidentInvolved] Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Summary: [Description]
Initial Severity: [Outcome] Click Here to review this incident that you submitted.	Incident affected: [IncidentInvolved]
<u>Click Here</u> to review this incident that you submitted.	Initial Severity: [Outcome]
<u>Click Here</u> to review this incident that you submitted.	
	Click Here to review this incident that you submitted.
Design HTML Preview	Design HTML Preview

Adding the details from a sub form to the body of the email

Some of the information stored in the forms in your system are contained in **sub forms**:

	Add (Corrective Action	n									
	Action ID	Action commenced date	Action	Category of action	Strength of action	Due date	Status	Date Completed	Authorised	Responsible person name	Source of recommendation	
1	1	17 Aug 2016	Placement of signage in the cafeteria reminding staff of the banana peel disposal and safety policy	Policy/procedure/guideline	Moderate	23 Aug 2016	In progress		Yes	Billy Bloggs	WHS	×

It is possible to add the content of these forms to the body of your email in a table format. To do so, select the appropriate sub form from the drop down box:

You may also include details about "related" information. This is where there are multiple sub-	Initial Severity: [Outcome]
tems that link to a parent item. A common example is Journals. To display this information in an email you need to add a table of items. Place your cursor in the email where you prior the table to appear and then select a relativitient below and a table builder will open for instruction.	<u>Click Here</u> to review this incident that you submitted.
Infection	
Medication	
Pressure Injury	
Wound	
Others involved	
Corrective Action	
Incident Analysis	*

This will open the **Related Table Builder**.

Related table builder	0
Build a table for Corrective Action: Select a field from the below list to add it to the end of the	↓ Action ↓ Action ☆ ↓ Category of action ↓ Due date ↓ Date Completed person name ↓ Responsible person name
layout at right:	Here you build a table to add to the email to display multiple rows of information.
•	
Add table to Email	Standard Compact Standard Red Accation T991 June 2015/Office B002 June 2015/Carpark B002 June 2015/Carpark
Add table to Email	3

● **Field Select**: Choose a field from the selected sub form to add to the table. It will be added to the table space in **②**.

• **Table columns**: Adjust the column order and widths of the fields you have chosen to put in your table.

6 Table format: Choose a format for your table. You can make additional formatting changes once you have inserted it into the email body.

4 Add table to Email: Click to close the related table builder and add the table to your email.

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The table we configured above looks like this when inserted into our email:

Action ID	Actio	on	Category of action	Due date	Status	Date Completed	Responsible person name
[PCAID]	[PCAAction]		[PCACategory]	[PCADueDate]	[PCAStatus]	[PCACompleteDate]	[PCARespPerson_name]

From here, we could apply additional formatting to the content of the table if we wanted to.

When the email is generated, then the number of sub form entries in the record that has triggered the alert will be entered into this table. Please note there is no way to restrict which type of sub form entries go into this table (ie. Based on a filter).

Alert Digest

If, in the **Rules** options of your alert, you selected the option **Send a Digest email at the end of the nominated interval which summarises every item that satisfied the alert conditions**, you will see the **Digest options**:

Email Notifications	
 Send an email every time the conditions are satisfied Send a Digest email at the end of the nominated interval which set item that satisfied the alert conditions. 	summarises every

The Digest is designed to provide the recipient with a summary of all the records which matched the conditions of the alert during a given timeframe.

🎊 🧕 My Workspace 🔹 Management 🔹 Administration 🔹	Data Reports * Help Log Out	USER: System Manager (Manager)
00	Incident Alert Edit	
<image/>	Incident Alert Edit Digest Email Time Frame: The previous 1 Honths(s) v up to Prior Month End v Run Frequency:Every month on the 2nd at 00 00 Digest Email Subject Email Body Prior Month End v Prior Month End v C Email Body Vormal v Arial v (Font Size) B J U S E = = # \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	
	Design HTML Preview	

• **Timeframe & Frequency**: Set the summary timeframe (eg. the previous calendar week) and how often the digest email should be sent (eg. every 7 days).

2 Email Subject: Enter the text that you want to have shown in the subject line of the email.

6 Email Body: Enter the text that you want to have shown in the body of the email.

9 Edit mode tabs: Switch between different edit modes for more control, or to test the functionality of your email (to test hyperlinks, for example).

• **Summary table builder**: Use this tool to create a table which summarises all the records that matched the conditions of the alert

Setting the Digest timeframe and frequency

The timeframe is the duration of time you want to summarise. Any record which matched the conditions of this alert during the timeframe you stipulate will be included in the summary table you will build.

Time Frame:	The previous	1	+	Months(s)	-	up to	Prior Month End	-

The available options are:

The previous	Timeframe	Up to
(arbitrary)	Day(s)	Run date
	Weeks(s)	Prior day end
	Month(s)	Prior week end
	Year(s)	Prior month end
		Prior quarter end
		Prior year end
		Prior financial year
		end

The frequency is how often the Digest should be generated and emailed to the recipient.

Run Frequency:Every month on the 5th at 08 : 30

The available options are:

Every	Timeframe options	Time
Day	-	The time of day the
		digest should be
		generated
Week	Days of the week	

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Month	Dates of the month	
Year	Dates of the month and months of the year	

Building the digest table

You must ensure that you create the table which will summarise each record which matched the conditions of the alert. To do this, click the **Add summary table to email** button:

A Digest email summerises all records that this alert has fired for in the specified period. The email can	Time Frame: The previous 1
contain a table of the appropriate items identified. Please note: the table will list the items that fired the	Run Frequency:Every month on t
alert. If the item has been edited, it may no longer meet the alert conditions, but it will still be included in the table.	Digest Email Subject
	Email Body
For a Digest email, since there is no single specific item that it is based on, there is no single field	🔏 🗇 🛍 🛸 🗠 🚳 X ²
table covering all the items that the Digest email relates to.	Normal 🔻 Arial
Add summary table to email	

Alert Management

This will open the Related Table Builder:

Build a table for Just		
Incidents: Select a field from the below list to add it to the end of the	ID Incident Incident Time Incident Time <tdi< th=""><th></th></tdi<>	
Add this field as a link.	 Here you build a table to add to the email to display multiple rows of information. I Drag this to reorder the columns. I Click this if the column is not required. Drag the cell divider to resize the column. Select the table style you want below 	
Add table to Email	Standard Compact Standard Red • Red • Red • Hazard Id Date Location Id Date Location Id Date Location 7991 June 2015/Office Fed Location Fed Location Fed Location Fed Location Fed Location 8002 June 2015/Carpark B002 June 2015/Carpark B002 June 2015/Carpark B002 June 2015/Carpark B002 June 2015/Carpark	

• Field Select: Choose a field from the selected sub form to add to the table. It will be added to the table space in •. If you want the value from the field to be a clickable link which opens the related record, check the box Add this field as a link, and *then* add the field. We would recommend making **Display ID** the clickable link.

2 Table columns: Adjust the column order and widths of the fields you have chosen to put in your table.

• **Table format**: Choose a format for your table. You can make additional formatting changes once you have inserted it into the email body.

4 Add table to Email: Click to close the related table builder and add the table to your email.

The table we configured above looks like this when inserted into our email:

ime Frame:	The previous 7	🗘 Day(s)		up to Prior I	Day End	-		
tun Frequency:	Every week on	Monday at	08 : 30					
igest Email Sub	bject							
Summary of las	st week's patient falls							
mail Body								
X 🗅 🗖 .	🛅 🖘 🗠 🤒 3	X² X₂] Ξ Ξ Ξ	e 🔒 🚷		H			
Normal	▼ Arial	▼ (Font :	Size) - B	I <u>U</u> S	E E B	🐌 - A	-	
The following	g is a summary of all pat	tient falls that happene	d in the previous w	eek. Click on the	ID number of	f a record to o	open the respec	tive incident.
Display	v ID Incident Dat	te Incident Time	(24 hrs) W	ard/l ocation	Actual S	AC Rating	Summary	of incident
[DisplayID]	[IncidentDate]	[IncidentTime]	Progra	ml	[IncActualS	ACRating]	[Description]	
		Inconcint inte	[[I I Vyia		line totalare	ronaungj	lecochphoni	
	1	[incident fille]	[i logia		[[Intel totalait	Kortaungj	Description	
	[[incident rine]			[inditional	JACI (aling)	[Description]	
		Incontraine	Li Togra		Increase	JACI (aulig)	[Description]	
		[Incodent nine]			Increase	Kortalingj	[Pesenpaon]	
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		[incount me]	[i rogra			or or adding		
		[Incoont mis]	[t rogra			or coreating	[Description]	
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			[i ¹ 10g1a	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		, or calling		

Alert Schedule

The schedule allows you to determine when your alert should be processed by the system

rkspace 👻 Management 👻	Administration +	Data Reports	✓ Help	Log Out			USE	ER: System Manager
		Incident A	lert Edi	t				
		5	Schedu	le				
How often should this alert be	e processed?							
	-							
Every:	1	Minute	Hour	Day	Week	Month	Year	
Sort order when processing:	1000	- 2						
The alert will test it's conditio	ns on this schedule:							
Next 20 schedule date/times								
Monday,29 August 2016 11:20 Monday,29 August 2016 11:22	Monday,29 August 20 Monday,29 August 20	16 11:21 3						
Monday,29 August 2016 11:24 Monday,29 August 2016 11:26	Monday,29 August 20 Monday,29 August 20	16 11:25 16 11:27						
Monday,29 August 2016 11:28 Monday,29 August 2016 11:30	Monday,29 August 20 Monday,29 August 20	16 11:29						
Monday,29 August 2016 11:32 Monday,29 August 2016 11:34	Monday,29 August 20 Monday,29 August 20	16 11:33						
Monday,29 August 2016 11:36	Monday, 29 August 20	16 11:37						
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• Frequency: Use these options to set how often the alert will be processed.

• Sort order when processing: This generally only needs to be used on the advice of RiskMan Support. If you have more than one alert that needs to be processed at the same time, the value in this field allows you to determine the order in which each competing alert should be processed.

6 Next scheduled run time: Tells you exactly when the alert will next be processed.

When should the Schedule function be used?

Alert method	Usage	Comments
Check each item when it is	Scheduling is optional	Generally you wouldn't need to schedule
saved		alert processing as these alerts are for
		notifying recipients as soon as
		something has happened. However, you
		may wish to schedule the alert to be
		processed in restricted times only, for
		example if the recipient only wants to
		receive emails during office hours.

		By default, if you don't make
		modifications in the Schedule options,
		the alert can process "all the time".
Scan all items periodically	You <u>must</u> make a	You must tell the system how often the
(i.e. reminder alerts)	schedule	recipient should be reminded
Trigger the alert once a	Not recommended	If you really need to, you can restrict
threshold has been		when threshold checking is performed,
exceeded		however because many threshold alerts
		are monitoring vital information, it is
		generally not recommended to further
		restrict when the alert is processed.

Please note that **Digest Emails** are not subject to any scheduling that you set here, as they have their own prescribed frequency.

Examples of Schedules

The following schedule could be used prevent an alert from running outside of regular business hours:

Every:				Minute	H	our	Day	Wee	ek N	Nonth	Yea	r	
Days of week:	Sat	turday	Su	nday	Mor	ıday	Tues	day	Wedn	iesday	Th	ursday	Friday
the set of the states		00	01	02	03	04	05	06	07	08	09	10	11
Hours of the day:		12	13	14	15	16	17	18	19	20	21	22	23
													1
			00	01	02	03	04	05	06	07	08	09	
			10	11	12	13	14	15	16	17	18	19	
			20	21	22	23	24	25	26	27	28	29	
Minutes of the hours:			30	31	32	33	34	35	36	37	38	39	
			40	41	42	43	44	45	46	47	48	49	
			50	51	52	53	54	55	56	57	58	59	

Note that for any records that match the conditions of the alert, but are entered <u>outside</u> the scheduled processing times, those records will be included when the alert next processes.

For example, based on the above schedule, if an incident occurred at 11:30pm on Tuesday night, the alert would generate an email and send it to the recipient at 8:00am on Wednesday morning.

This schedule might be used for a reminder alert. It will alert the recipient every Tuesday and Thursday at 2:30pm:

Every:			Minute	Н	our	Day	We	ek N	lonth	Year		
Days of week:	Saturday	Su	inday	Mon	day	Tues	day	Wedn	esday	Thu	rsday	Friday
	00	01	02	03	04	05	06	07	08	09	10	11
Hours of the day:	12	13	14	15	16	17	18	19	20	21	22	23
		00	01	02	03	04	05	06	07	08	09	
		10	11	12	13	14	15	16	17	18	19	
Minutes of the hours:		20	21	22	23	24	25	26	27	28	29	
		30	31	32	33	34	35	36	37	38	39	
		40	41	42	43	44	45	46	47	48	49	
		50	51	52	53	54	55	56	57	58	59	

This schedule might be used as a reminder that something is overdue. It reminds the recipient every four days, at 8:00am, until they complete what is outstanding.



Alert Processes

Processes has two functions:

P.				In all a set A	Level III a				
9				Incident A	lert Ed	π			
6	•			F	Proces	ses			
RODUCTION	U—		Th	is section enables you to co	nfigure advar	ced proce	esses asso	ciated with this alert.	
:	Proc	esses							
DETAILS	Selec	t the proce.	ss you wish to activate when this alert is triggered.						
Δ		Pipeline -	Incidents To Learnings						
RULES		Pipeline -	Incidents to RCA - Clinical						
8 ⁰		Pipeline -	Incidents to RCA - Corporate						
₩ġ		Pipeline -	Incidents to RIB - Clinical						
SADITIONS		, Pipeline -	Incidents to Kib - Corporate	1					
	2 Alert This f	t Chaining	ws you to designate that this alert should run for an item	only if other alerts have or h	ave not proc	essed for	the item p	reviously.	
	2 Alert	t Chaining eature allo low the ale AlertID	ws you to designate that this alert should run for an item rt to process for a record ONLY if that record HAS triggere Alert Name	only if other alerts have or h d the following other alerts.	ave not proc	essed for Allo	the item p w the alert AlertID	reviously. to process for a record ONLY if that record HAS NOT triggered the following other JAIert Name	r ale
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• **Processes**: If the alert you are setting up is to execute a **pipeline process**, select the respective process here.

2 Alert Chaining: Allows you to designate that an individual record either:

- Cannot trigger this alert unless that record has already triggered the selected alerts on the left; and/or,
- Can trigger this alert only if the selected alerts on the right hand side have <u>not</u> been triggered by that record.

This allows for some reasonably complex workflows to be orchestrated. However, these processes would generally be setup in conjunction with RiskMan, in particular pipeline processes.

Save your alert

Once you have setup your alert, save it by clicking the Sicon in the toolbar:



Clicking the Sicon will take you back to the Alerts list page without saving your changes.

Clone an alert

If you have several alerts to create, but perhaps with slightly different conditions or different recipients, you can open an existing alert, click the 🖓 icon in the toolbar, make your desired changes, and save this as a new alert.

Alert Logging

Once you have saved your alert, the activity associated with it can be seen in the **Logging** section.



ADMINISTRATION OF ALERTS

There is one permission for each register:

Register tab (e.g. Incidents) > **Administrative Permissions**

• Can manage Alerts

There is also a Global Setting that affects the behaviour of Alerts:

Global Settings > Alerts > 20) Apply user restrictions when creating alerts

Enabling this setting will automatically include a user's site restrictions (if any) as conditions when the alert is created.

Alert Import / Export

It is possible to export alerts from one system to another. This could be practical if you have, for example, setup alerts on your training or model system, and want to import them into your live system once you are happy that they are setup correctly.



To export alerts: First, filter the list of alerts that you wish to export. Then, click on the export icon **Solution**. Your web browser will prompt you to either save or open the resulting text file:

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	1	**Incident TEMPLATE ALERT		Vhims2 Incident		This is the incident alert template which can be used to clone for creating other alerts		< <no one="">:</no>	>	•	Manager		9 Jun 2016 15:39				0			Û
	2	Incident Reporter®# Manager Ale	39; ert	Vhims2 Incident		Notify the reporter's manager a new incident has been entered		< <reporters< td=""><td>M</td><td></td><td>Manager</td><td></td><td>9 Jun 2016 15:40</td><td></td><td></td><td></td><td>0</td><td></td><td>_</td><td>Û</td></reporters<>	M		Manager		9 Jun 2016 15:40				0		_	Û
	3	Action Allocation		Vhims2 Incident		Notify a user they have been assigned a corrective action for follow-up		< <field:pca< td=""><td>Im</td><td></td><td>Manager</td><td></td><td>9 Jun 2016 16:22</td><td></td><td>Manager</td><td>22 Jun 2016 09:29</td><td></td><td></td><td></td><td>Û</td></field:pca<>	Im		Manager		9 Jun 2016 16:22		Manager	22 Jun 2016 09:29				Û
	4	Incident Acknowledg	em	Vhims2 Incident		Sends a confirmation email to a user after they have submitted an incident.		< <original r<="" td=""><td>ler</td><td></td><td>Manager</td><td></td><td>9 Jun 2016 16:52</td><td></td><td></td><td></td><td></td><td></td><td></td><td>Û</td></original>	ler		Manager		9 Jun 2016 16:52							Û

To import alerts: Click on the import icon **1**. The **Alert Import** dialog will appear:

- **0 Browse**: Search for the target file on your computer that contains the alerts you wish to import.
- **Outpload File:** Uploads the file for analysis.

After uploading your import file:

Alert Import	ж
Alert Import	
Browse and select a file containing an export of RiskMan Alerts. Click the 'Upload File' • Browse and select a file containing an export of RiskMan Alerts. Click the 'Upload File' button. • The file will be uploaded and a summary displayed. No alerts created at this point. • If the file validates a valid import and you wish to procede, click the 'Perform Import' button which will appear. • Otherwise, you may browse for a different upload file. • Alerts that already exist in this database will not be uploaded.	
How do you want the alerts processing dates initialized? O Unchanged values. O Reset to process all existing items. I Reset to process new items, starting now. Do you want the imported alerts 'enabled'? O Unchanged O Enabled I Disabled Perform Import	
This is a summary of the alerts in the file. No import has yet taken place. OK to import Alert GUID f7011b84-9e27-4198-b10a-34ab8f3cf370 (originaly id 6) Cancel	

• **Import Options**: Allows you to designate which records should be processed by the imported alert(s):

- **Reset to process all existing items** means that when your alert is imported and enabled, it will look through your **entire** database, and based on the rules of that alert, will trigger for any matching record.
- **Reset to process new items, starting now** means that the alert will ignore all the existing records in your database, and only process for new records that are submitted <u>after</u> alert is imported and enabled.
- **Unchanged values** will retain whatever values were in the original alert in the source system,

Alert Management

As well as the alert status (enabled/disabled):

- Unchanged: Keeps the status each alert had in the source system
- Enabled: Enables all alerts in the import
- **Disabled**: Disables all alerts in the import

Click the **Perform Import** button to complete the import.

Import Summary: This summary tells you whether the alert exists in the destination system.
 Any alert that already exists will be skipped.

ADDITIONAL INFORMATION & TIPS

Please note that if a user has permission to see the Alerts Management page, they can see <u>all</u> alerts in the system – not just the ones they have created. For that reason, please exercise caution as to who is able to maintain alerts. Changes made to alerts cannot be reversed.

Please refer to the **Alert Examples Supplement** for detailed examples of different alert types, and the appropriate configuration of all the applicable settings.

RELATED TOPICS

Global Settings