# **C**RLDatix

### Introduction

This reference guide is aimed at RiskMan Administrators who will be responsible for maintaining all the Register (e.g. Incidents, Feedback, Risks, Quality Activities) and non-Register specific lists used in your RiskMan

## What are the Lists & Codes?

The **List & Codes Maintenance** provides Administrators with the ability to view the content of all the list fields used in your RiskMan with access to editing, adding or deleting lists

In addition, users with the appropriate permissions can import list items from an Excel<sup>™</sup> document saved as a CSV file into specific lists

A detailed description of the standard lists available in the List & Codes Maintenance can be found in the **RiskMan List & Codes Maintenance Description Guide** accessed from the *Help* menu under *Reference guides* 

# What user permissions do I need to access the List & Codes Maintenance?

For a user to have permission to the List & Codes Maintenance page they will need the following permission

• General Administrative Permissions: Can maintain codes (e.g. Site list)

# What user permissions do I need to import data into the List & Codes Maintenance?

For a user to have permission to import data into the Lists they will need to have access to the List & Codes Maintenance page and have the following:

- General Administrative Permissions: Can import list
   from Excel
- In addition the **Import** button needs to be enabled on the lists that you wish to import into

**Note:** This requires assistance from RiskMan Support – support@riskman.net.au

## How do I access List & Codes Maintenance?

- 1. From the menu select Administration -> List & Codes Maintenance
- 2. When some lists are selected you will see an

information icon **1 0**. This will show additional about the list in question.

•	Ð	0			Lis	st & Codes Maint	enance
				List Name: (Incid	ents) Body Part /	Affected Graphics	٠
This list	allows y	ou to n	ame the body parts used in gra	phical selectors			1
				Body Part Description 9	Sort Order 9	Graphic Name 🕈	Body Part Name
				٩	÷.	· · · · · · · · · · · · · · · · · · ·	
				Not stated/inadequately described	29	None.gif	None
				Lower Right Front Abdomen	49	Lower_Right_Front_Abdomen.gif	Lower Right Fron
				Hand Right	30	Hand_Right.gif	Hand Right
				Hand Left	31	Hand_Left.gif	Hand Left
				Front Right Thigh	57	Front_Right_Tigh.glf	Front Right Thigh

The maintenance lists are segregated as follows:

(Alerts) – Lists specific to Alert Management.

**(Feedback)** - Lists that are specific to the Feedback Register will be pre-fixed with (Feedback).

(Incidents) - Lists that are specific to the Incident Register will be pre-fixed with (Incidents).

(Quality) - Lists specific to the Quality Activity Register wi	11
be pre-fixed with (Quality).	

# **Note:** These lists will only be available if you have purchased RiskMan Q

(**Risk Register**) – Lists that are specific to the Risk Register will be prefixed with (Risk Register)

No prefix – All other lists that are either shared between the Registers or are non-Register specific e.g. pop-up messages targeted at individuals or all users on a template

**Note:** Additional list items may appear in your List & Codes Maintenance, depending on what Registers you have available and any additional extensions that you might have available. These will either appear with no prefix or will have a related prefix e.g. The Register Name; Or the extension name e.g. (MET) for those who have the MET extension in their Incident Register

# How do you access a list in the List & Codes Maintenance page?

 If you want to narrow down your search, choose the appropriate register from which you want to alter your lists under Lists for Register 1 If you want to conduct a general search, select {All}

ist Name:	(Feedb	ack) Re	lated Sen	vice			*	Lis	ats for Register:	0	1
		ID 🔻		Related Service      Sort Ord		Sort Order ₹	Ð			{All} Feedback Register	~
		10	,	Related Service	•					Incident Register Risk Register	~
			19769	Community Care		1	a contraction of the second	ŵ	-		
			22189	Executive		0	ø	⑪			
			19789	Finance		3	ø	⑪			
			22909	Information Technology		7	ø	節			
			22388	Property Services		4	ø	⑪			
			19785	Quality Support		2	ø	⑪			
			19688	Residential		1	ø	⑪			
			19776	Respite & Direct Care	2	1	ø	⑪			

 Select the relevant list from List Name. You can do this by either Oscrolling down to find the applicable list name amongst all lists within the register or O typing part of the list name you are looking for so the lists will be filtered accordingly

List Name:	1	-	Lists fo	or Register:	{All}	
	List Caption	Reco	rds Found			
	(Alert) Level 1	0	0			
	(Alert) Level 2	0	0			
	(Alert) Level 3	0	0			
	(Documents) File Extensions	86	86			
	(Feedback) Complainant Objective	14	14			
	(Feedback) Consent Given to Person Providing Feedback	4				
	(Feedback) Consumer Type	11				
	(Feedback) Country	229				
	(Feedback) Current Status	3	3			
	(Feedback) Custom Feedback Report Selection	0	0			
	(Feedback) Ease Of Resolution	4	4			
	(Feedback) Ethnicity	26	26			
	(Feedback) Feedback Involved	4	4			
	(Feedback) Feedback Report Date Selection	10	10			
	(Feedback) Feedback Report Filter Options	5	5			
	(Feedback) Formality Level	2				
	(Feedback) Gender	3				
	(Feedback) Has Permission to Access Medical Information	4	4			
	(Feedback) Interpreter	3		$\sim$		
	(Feedback) Issue Category	207				

st Name	falls 2	× - Lists fo	r Register: {All}
	List Caption	Records Found	
	(Incidents) (Fall) Activity at time of Fall	9	
	(Incidents) (Fall) Contributing Factors	7	^
	(Incidents) (Fall) Fall Complication	8	
	(Incidents) (Fall) Fall Context	2	
	(Incidents) (Fall) Fall History	5	
	(Incidents) (Fall) Fall Ratings	19	
	(Incidents) (Fall) Footwear	5	
	(Incidents) (Fall) Mobility Aids	4	~
	(Incidents) (Fall) Prevention Strategies	18	•

#### 3. The selected list will display

-

Ð	0			List & Codes Maintenance						
			List N	ame: (Incidents) Journal Types		+ Lists	tor Register: {AII}	-		
if Su	ppress in Compreh	ansive Report' is	set to 'Yes', then that	fault is, when a Journal with no ty Journal type to be not abown whe	in producing a 'Comprehensit					
ÐŦ	Journal Types ▼	Sort Order #	Show Reference #	Show Date Received fields. #	Show Date Sent Relds. *	Show FollowUp fields. *	Show Amount(cost) Rold. *	Show Linked Document field. 7		
	*		×		*		*			
214/4	Action Required	20	No	No	Yes	Yes	No	No		
	Correspondence	70	No	Yes	Yes	No	No	No		
21820				No	No	No	No			
	Executive Sign Off	60	No	NO		ne.	190	No		
21820 20934 20733	Executive Sign Off General Comments		No	No	No	Yes	No	No		
20954	Grt General	10								

# What general settings can be adjusted on the Lists & Codes Maintenance page?

Lists and Codes Maintenance contains several settings that can be adjusted to suit the user. To access these settings

LIST & C	odes Maintenan	ce	12 🔅
		ts for Register.	
T	Sort Order 💌	•	
8	•		
untington	10	面	
	999	ŵ	
ivate			
ivate us Lodge	999	ΠŪ	

#### The below options will appear:

Settings		×
Number of rows to display:	20 -	
Include actual listname in list selector:		
Edit rows using a Form:		
Make the grid the fill the page width:		
Display the row ID column:		
Apply		
		//

Below is an outline of each setting and its purpose. Select the options which are relevant to you and click **Apply**.

- Number of Rows to display Allows you to select how many rows are displaying per page
- Include actual listname in list selector: The default setting in Lists & Codes Maintenance is to show the List Caption or the friendly name of the list. This is the name that users can see when utilising the system (e.g. on an incident entry form). The Actual Listname, on the other hand, is the underlying database list name. If this option is ticked, you will see both the friendly name<sup>1</sup> and the actual listname<sup>2</sup> under ListName:

.ist Name:	Reporter's Position [NatureOfEmployment]	×	-	Lists for Register:
	List Caption	A	ctua	I Listname 🛛 😢
	Reporter's Position	N	atur	eOfEmployment
	(Incidents) OH&S Nature of Injury List	N	atur	eOfInjury
	(Incidents) Notifiable Events	N	otifia	ableEvents

Please note that in the majority of cases users will not need to enable this setting as it is largely used for programming purposes only.

3. Edit rows using a form – This option allows the user to change the way lists and codes are edited.

If the Edit rows using a Form option is selected, each list

will have a (edit) icon next to it. By clicking on this icon, drop-down boxes for the relevant list will appear to enable the user to make any necessary changes with sufficient space. After any changes are

made to the list, click on the icon solution to save. If you want to close the drop-down box for a list without

saving changes, click on the **o**icon. Be aware that when using form edit mode, lists can only be edited and saved individually.

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List & Codes Maintenance									
List Name:	Reporte	er's Posi	ition [N	latureOfEmploymen	t]		*	Lists	for Registe
		ID	Ŷ	Employment	Ŷ	Sort Order 🕈	6	3	]
					Ŷ	* *			
			21756	Administration		999	00	節	
			21875	AIN		999	<b>1</b>	面	
			20603	Business Office M	anager	999	(A)	⑪	
			22357	CFO		999	(M)	Ê	
			18937	Cleaner		999	(A)	ŵ	
			20526	Clinical Manager		999	(M)	ŵ	
			22631	Cura - BDM		999	(Jan)	ŵ	
			21726	Cura - CEO		999		m	

22357	CFO	999	ø 🛍
18937	Cleaner	999	
ID 💈	18937		
Employmen	t Cleaner		
Sort Order	999		4. 
			6 🛇 🕄

If the **Edit rows using a form** option is not ticked, lists and codes are edited directly via the text field **1**. Multiple text fields can be edited before saving changes. After all relevant lists and codes have been edited, click on the



icon ❷ and all changes will be saved in bulk. To

revoke any changes made click on the kinetic icon 8.

C D List & Codes Mainte	enan	ce
8		_
List Name: Login notification messages. [LoginMessage]		-
Message to display at login	Ŧ	Ena
	Ŷ	
Welcome to RiskMan.		No
Do you know what the difference is between an incident, a Hazard and a near miss?	1	No
	List Name Login notification messages. [LoginMessage]	List Name Login notification messages. [LoginMessage]  Message to display at login  Welcome to RiskMen.

 Make the Grid width fill the page – If this option is selected, the applicable Lists & Codes grid will take up the entire width of the page. If this option is not selected, the applicable Lists & Codes grid will only take up a small portion of the page.

Full width grid selected:

+	List & Codes Maintenance					¢ <u>±</u>
		List Name Ster [516]	• Lists for Register	(41) *		
ID .	* Sto		*	Sert Order	۲	0
			*			
2521	2 Adeletide Day Surgery				999	
2623	is Ballarat Day Precidare Centre				900	
2513	9 Brindabelle Endoscopy Centre				999	÷.
2531	Chesterville Day Dispital				999	10
	4 Cara Corporate Office				910	÷
	6 Dee Wily Endoscopy				995	10
2523	15 Eye Lodi Southode and Spring Mil				909	<b>n</b>
2521	O Epswich Day Surgery				929	<b>1</b>
	15 Kewara Private Ibipital				999	11
	<ul> <li>Quochsland eya Hospital</li> </ul>				900	首
	K7 Sydney Day Surgery Prince Altred				999	
	6 The typ Hootel				900	首
	8 Tcowoomba Surgicentre				900	
2521	M Victoria Pacate Surgery Gentre				999	11

Full width grid not selected:

t Name: §	Site [Si	te]		*	Lists for Register.	{AII}	
	ID	Ŷ	Site 💡	Sort Order 🕈	0		
				1			
		26202	Adelaide Day Surgery	999	Û		
		26208	Ballarat Day Procedure Centre	999	⑪		
		26199	Brindabella Endoscopy Centre	999	窗		
		26201	Chesterville Day Hospital	999	⑪		
		26804	Cura Corporate Office	999	10		
		21186	Dee Why Endoscopy	999	Û		
		26215	Eye Tech Southside and Spring Hill	999	ŵ		
		26200	Ipswich Day Surgery	999	⑪		
		26203	Kawana Private Hospital	999	⑪		
		26205	Queensland Eye Hospital	999	ŵ		
		26197	Sydney Day Surgery Prince Alfred	999	面		
		26206	The Eye Hospital	999	面		
		26198	Toowoomba Surgicentre	999	m		

5. Display ID columns – Every row has an ID number which is a numerical value identifying the actual row containing specific information. If this setting is switched on this ID number will display. Please note that in the majority of cases this setting will not need to be enabled as it will be used for programming purposes.

ID	۴	Employment 💡	Sort Order 🕈	0
		Ŷ	*	
21	1756	Administration	999	Ê
21	1875	AIN	999	童
20	0603	Business Office Manager	999	節
22	2357	CFO	999	節

After the relevant settings have been adjusted accordingly, click **Apply**.

# How do I add a new list item?

Select a list from List Name e.g. Site and click on the icon 1

Ð	List & Cod
	List Name: (Incidents) (Pressure Injury) Risk Score
Risk Score	
>10 - At Risk	
>15 - High Risk	

 If you have Edit rows using a Form *ticked* then an additional row will appear at the top of your listings as below:

Risk Score	Ŷ	Sort Order 🕈	•
	Ŷ	<u>ــــــــــــــــــــــــــــــــــــ</u>	
	_		Ē
>10 - At Risk		30	Ê
>15 - High Risk		20	ŵ
>20 - Very High Risk		10	Ŵ
Less than 10 - Not At Risk		40	Ê
Not Recorded		999	Ê
♥ <u>Create Filter</u>			

3. If you have **Edit rows using a Form** *unticked* then additional rows will appear as below:

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Risk Score	Ŷ	Sort Order 🖣	6	3
	Ŷ	4. V		
Risk Score				
Sort Order 999				* *
				28
>10 - At Risk		30	sa t	⑪
>15 - High Risk		20	(A)	ŵ
>20 - Very High Risk		10	(ji)	Ê
Less than 10 - Not At F	lisk	40	(A)	ŵ
Not Recorded	999	(JP)	ŵ	
♥ Create Filter				

Enter the list name 

 and the sort order 
 if relevant. If sort order is not relevant then the list will be sorted in alphabetical order.

Edit rows using a Form unticked:

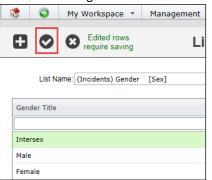
Risk Score	۴	Sort Or	der 🕈	0
	Ŷ		*	
0		2	÷	Ŵ
>10 - At Risk			30	Ê
>15 - High Risk			20	Ê
>20 - Very High Risk			10	Ê
Less than 10 - Not At Risk			40	Ŵ
Not Recorded			999	ŵ

#### Edit rows using a form ticked:

	,		
Risk Score	Ŷ	Sort Order 🕈	Ð
	۴	* *	
Risk Score			
Sort Order 999	2		* *
			00
>10 - At Risk		30	e 🖉
>15 - High Risk		20	e 🖉
>20 - Very High Risk		10	e 🖉
Less than 10 - Not At R	isk	40	e 🖉
Not Recorded		999	e 🖉 🖉

When saving is required, the field will be highlighted in green. A message will also present next to the save and delete icons to remind users that an action is required for changes that have been made.

#### 5. To save changes click the 🔍 icon



#### How do I delete a List Item?

- 1. Select the list from the List Name **0**
- Click on the 2 icon next to the listing that you wish to delete
- 3. Once the list value has been deleted, you have the option to **Recover** the deleted value. This will ensure you have the option to reverse the action if needed. If you want to continue with deletng the value, proceed to step 4
- 4. Delete rows requires saving. Click on the <sup>♥</sup> icon to confirm delete

Deleted rows require saving Edited rows require saving	l	_ist 8	& Codes N	lainten	ance
List Name: (Asset) De	partment 们			✓ Lists	for Register
	Department	Ŷ	Sort Order	Ŷ	0
		Ŷ		÷	6
	Admin			999	Recover
	Client Managemen	it		999	ŵ 🧭
	Development			999	面
	General			999	面
	Help Desk			999	面
	QA			999	面
	Training			999	面
	♥ <u>Create Filter</u>				

**Note:** There may be some situations where RiskMan will not let you delete a list item as it is being used elsewhere e.g. Site lists if they are linked with a User's Profile Restrictions. If this is the case you may need to contact RiskMan Support to look at having your existing data re-mapped before you can delete the list item.

## How do I edit an existing list item?

There are two different methods by which a user can edit an existing list item. Please refer to the section **What general settings can be adjusted on the Lists & Codes Maintenance page?** in this guide. Topic 2 *Use Form Edit* explains the different methods by which lists can be edited.

**Note:** Changing or deleting an entry in a list simply changes the list entry – it does not alter any notifications/activities, user profiles, alerts or risks that have already been classified using the amended or deleted entry. **For example**: If the "Paediatrics" entry in the Programs list is altered to "Children's Health", any notifications/activities/items on file that were classified using "Paediatrics" will remain as "Paediatrics". Contact support at RiskMan Support – <u>support@riskman.net.au</u> if re-mapping is required as a result of changing or deleting a list item

## Can I sort my lists?

- 1. With a list selected, click on the column heading 0
- 2. An **arrow 2** will appear next to the heading indicating the direction of the sort (ascending or descending)

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If you wish to sort the column in the opposite direction click on the column heading 

 again

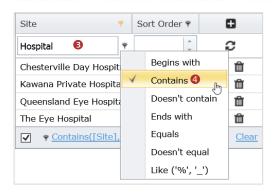
Site 0	Sort Order 🕈	θ
	<b>?</b>	
Adelaide Day Surgery	999	ŵ
Ballarat Day Procedure Centre	999	ŵ
Brindabella Endoscopy Centre	999	ŵ
Chesterville Day Hospital	999	ŵ
Cura Corporate Office	999	面
Dee Why Endoscopy	999	面
Eye Tech Southside and Spring Hill	999	⑪
Ipswich Day Surgery	999	Û
Site 2	Sort Order 🕈	0
	P	
Victoria Parade Surgery Centre	999	ŵ
Toowoomba Surgicentre	999	ŵ
The Eye Hospital	999	ŵ
Sydney Day Surgery Prince Alfred	999	ŵ
Queensland Eye Hospital	999	Ê
Kawana Private Hospital	999	Ê
Ipswich Day Surgery	999	Ê

# Can I filter my lists?

There are two methods by which you can filter your lists:

- With a list selected, click the Filter icon next to the column heading A drop down list of available filtering items will display. This will include blanks, non-blanks and the name of each list item.
- 2. With a list selected, click the Filter icon *next to the blank space below the column heading* A drop down list of available logical tests will display. This will include begins with, contains, doesn't contain, ends with, equals, doesn't equal and like. After selecting the appropriate logical test, type in your filter criteria and press enter.

Site	🕈 Sort Order 🕈 🚦		
	(AII)		
	(Blanks)		
Adelaide Day Surgery	(Non blanks)		
Ballarat Day Procedure Centre	Adelaide Day Surgery 💈		
Brindabella Endoscopy Centre	Ballarat Day Procedure Cent		
Chesterville Day Hospital	Brindabella Endoscopy Cent Chesterville Day Hospital		
Cura Corporate Office	Cura Corporate Office		
Dee Why Endoscopy	Dee Why Endoscopy		
Eye Tech Southside and Spring Hill			
Ipswich Day Surgery	999 🧳 🕅		



**Note:** This might be useful when you are looking at your Site/Location lists and you only want to view the Locations for a particular Site

#### To remove a column filter

- To remove a top filter, click on the Filter I o icon next to the column heading and select (All) 2
- 2. To remove a bottom filter either:
  - a) Manually delete all the filter conditions under the column heading <sup>(6)</sup> and press ENTER



Site 🚺	🕈 Sort Order 🕈 🚦
	(All) 2 (Blanks)
Adelaide Day Surgery	(Non blanks)
Ballarat Day Procedure Centre	Adelaide Day Surgery
Brindabella Endoscopy Centre	Ballarat Day Procedure Cent Brindabella Endoscopy Cent
Chesterville Day Hospital	Chesterville Day Hospital
Cura Corporate Office	Cura Corporate Office
Dee Why Endoscopy	Dee Why Endoscopy
Eye Tech Southside and Spring Hill	
Ipswich Day Surgery	999. 🧪 🏛

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Site 📍	Sort Order 🕈	Ð
Hospital 🔓 🕄 🗙 🕈	4 7	0
Chesterville Day Hospital	999	e 🖉
Kawana Private Hospital	999	e 🖉
Queensland Eye Hospital	999	e 🖉
The Eye Hospital	999	e 🖉
Contains([Site], 'H	ospital')	<u>Clear</u>

+ %	Lis
	List Name: Site
Site	
hospital	
Chesterville Day Hospital	
Kawana Private Hospital	
Queensland Eye Hospital	
The Eye Hospital	
Contains([Site], 'hospital')	

# Can I export my lists to Excel™?

2.

1. Arrange your selected list e.g. sort or filter



- 3. You will have the option to save or open Excel<sup>™</sup>
- If you select **Open**, your maintenance list will open in Excel<sup>™</sup>
- 5. If you press **Save**, save your list. You will then have the option to open your list
- If you have filtered your list, only the filtered items will be displayed in the Excel<sup>™</sup> document

**Note:** If changes are made to the list in Excel<sup>™</sup> you can import your data back into the list in RiskMan – refer to the section "How do I import data into a list?"

Maintenance		¢ 1
✓ Lists for Register. ✓		
Sort Order	Ŷ	0
Ŷ	0	C
	999	ø 🛍
	999	e 🖞
	999	ø 🛍
	999	e 🖉

# How do I import data into a list?

#### Data file requirements

- The file you are importing **MUST BE** a **CSV** file (this file format is saved from an Excel<sup>™</sup> spreadsheet)
- The content of the data MUST contain the SAME heading names as the list you are importing to, In addition the NAME of the list e.g. SiteLocation, MUST be included in your CSV file

**Note:** Assistance from RiskMan support will be required to obtain the List Names

#### Example of the CSV file for the Site/Location list

Ð			List & Codes Ma	aintenance	
		List Name: Site	e/Speciality [Program]	* Lists for Ri	egis
ID 9 S	ite		Program		
	delaide Day Sumery delaide Day Su	· 🖉 •	Plastic Surgery		_
	delaide Day Su FILE HOME	INSERT PAGE LAYOUT	FORMULAS DATA REVIEW VIEW	ADD-INS	
	delaide Day Su 💼 🐰 Cut	Calibri v 11 v	A A = =	ext General	-
	delaide Day Su				
	delaide Day Su Paste 💞 Format Pair	ter B I U - 🖽 - 🖄	• ▲ • = = = € += 🗄 Merge 8	& Center - \$ - % , % .	-08
	allarat Day Pro Clipboard	rs Font	ra Alignment	ra Number	η,
	allarat Day Pro	$\times \checkmark f_x$			
	allarat Day Pro	$\neg \neg J_{\lambda}$			
	allarat Day Pro	В	с	D E	F
26814 B	allarat Day Pro	Site	Program	Sort Order	
	2 SiteSpeciality	Adelaide Day Surgery	Plastic Surgery Reconstructive & Cosmetic Surgery	999	
	5 SiteSpeciality	Adelaide Day Surgery	Oral Surgery	999	
	6 SiteSpeciality	Adelaide Day Surgery	Paediatric	999	
	7 SiteSpeciality	Adelaide Day Surgery	Ophthalmology	999	
	5 SiteSpeciality 6 SiteSpeciality	Adelaide Day Surgery	Paediatric	999	
The <b>I</b>	Name of the list r	needs 2. /	All other lists must c	orrespond to th	ne
	cluded as the <b>firs</b>	t list	s displayed in the re	spective List &	
o be in	ciudeu us trie mis				

#### To import data into a list

- 1. Select the list from List Name **0**
- 2. Click on the Import <sup>2</sup> icon

**Note:** The **Import** button will only be available on a list with the aid of RiskMan support

Ð			List & Code	s Maintenance		٥	*	1
		La	Nama Sie [Sie]	<ul> <li>Lists for Register</li> </ul>				
tD.		Sta		,	Sort Order	۲		
				Ŷ				
	26702	Adelade Day Surgery				999	1	
	25/108	Balland Day Procedure Cantra				200	1	
	25199	Brindahalla Endoscopy Gentre				999		Û
	20201	Cheelerstle Day Inspired				800		Û
	20804	Cara Carpanie Olice				999		Û
	21106	Dee Why Endescopy				999		Û
	26215	Eye Tech Southeide and Spring I III				999		Û
	20200	Reswich Day Surgery				999		Û
	26203	Kasvana Private Hospital				999		Û
	20205	Queensland Eye Hospital				999		Ĥ
	26197	Sytney Day Surgery Prince Almed				999		0
		The Eye Hospital				909		
	26198	Toswoomba Surgicentre				999		0
	26204	Victoria Parade Surgery Centre				999	1	

#### 3. A pop-up will appear with a list of options

	List	Importer
		Browse Upload
Test Only	Replace List O Append to list O Edit List	
Invalid File type	e. Please upload a File with extension: csv, xls, xlsx	~
	han same a tha bar faith a banda a shine, sin dana dhi da a dabh bhile, dhè a shè a sheanna sheabara a b	

- Test Only this is where you can test if the Spreadsheet from which you're importing is valid or not before importing the data. If the file is valid it will state *List* validates correctly. If the file is not valid it will state Invalid File type.
- Replace List this is where you import the applicable Spreadsheet to your current list and replace it with the existing data

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# **RISKMAN QUICK REFERENCE GUIDE TO MANAGING LISTS**

- **C** RLDatix<sup>™</sup>
- Append to list this is where you add data from the applicable Spreadsheet to the current list so that the list now contains both existing and appended data
- Edit List this is applicable if the Spreadsheet contains existing data with several amended changes. The system will pick up on changes made to the current list and edit the list as necessary. Please note that this setting will only work if **Display ID column** setting is switched on and the relevant ID is also showing in the attached Spreadsheet. This way the RiskMan system can gauge what data has been amended based on the relevant ID number.
- Locate the CSV <sup>(2)</sup> file that contains the data you wish to import
  - Only check the Replace existing data ④ option if you are replacing your list with your new list, otherwise the imported data will be appended to your existing list

**Note:** If you do replace your list with a new list you may wish your existing data e.g. Incidents, Feedback, Risks, Quality Activities, User Profiles or any other Registers to be remapped to your new lists. If this is the case contact RiskMan support – support@riskman.net.au

#### 5. Press Upload 6

#### 6. Your list will be updated

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## **Administration Icon**

The Administration icon is available to access Lists and Codes that are not available to Administrators. The icon is presented for RiskMan support purposes to allow the RiskMan support staff to access these lists if required.

2. If you have selected **Use Form Edit**, your screen will look as below:

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	List Name: (Incident	ts) TooTip Definitions (TooTip_Inddents) - Lists	for R	egister. Incide	rt Register	٠		
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The function is password protected and only a password generated by RiskMan will access the tool.

## **Tooltips**

Tool Tips are available on fields and in some cases buttons on the Register Entry form and can be created through the List Maintenance page by selecting the respective ToolTip Definitions list

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	List Name: (Incidents	) ToolTip Definitions • Lists for	Register:		٠	
A type of Mouseover will display a mot The other types will display a static Tor Due to a bug in the way internet Explo	oitip when the field gets the focus, which	h disappears when the focus is lost. eventaps a dropdownist, it will appear BEHIND the list.				
Label of the Field to show ToolTip on $\Psi$	Τορ Τίρ 🛛 🕈	Bottom Tip	P Top Color P	Bottom Color *	Tooltip Type 🕈	0
×	•		* ·	×	×	
AC-StaffRerpAction	<b>Staff Action Taken</b>	Give datafis of any further action taken at the time of this report, such as staff counselling or disciplinary action.	Red	LemorChilfon	MOUSFOVER	1
Button: Classification	<h>What type of event happened?</h>	   du>must select a <font color="red">Insident Type</font> and a <font color="red">Definition</font> where ever definitions are available.     and a <font color="red">Definition</font>	Red	LemonChilton	MOUSEOVER	1
	sh-Incident Detailsh-2	Give stop-by-stop details of the incident - the more information the better. What did you see, who was involved, ease(by what did you do.Don't use names - refer to "the resident" or "stoff member". Tell the	Red	LenorChillon	MOUSEOVER	1
Details of Incident	Costricitent Decareos	story so that your memory and the person who invostigates the incident losse exactly what you saw, what you did and who was involved.	NEU			
Details of Encident.	<b> Incident Involved </b>	incident know exactly what you saw, what you did and who was	ScaGreen	Cadettilue	MOJSLOVER	11

#### Example: Incident Tool Tips

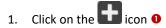
3 0				List & Codes Maint	enan	ce						¢	ľ
	List	Name: (Risk Reg	ister)	ToofTip Definitions		• Lis	sts for R	rgister: Risk Registe	ti -	*			
A type of Mouseover will display a mobile tool The other types will display a static Toothy wh Due to a bug in the way internet Explorer dipli	en the field ge sys dropdown i	ts the facus, which lists, if the tootlip o	i disag verlag	spears when the focus is lost. as a dropdownlist, it will appear BEHIND !		Tes Cites		Bullion Color		Teolific Teor			
The other types will display a static Tootip wh Due to a bug in the way internet Explorer dpi	en the field ge sys dropdown i	ts the focus, which	erla;	pears when the focus is lost.		Top Color		Bottom Celor	*	Tootip Type	Ŧ	6	,
The other types will display a static Tootip wh Due to a bug in the way internet Explorer dpi	en the field ge sys dropdown i	ts the facus, which lists, if the tootlip o	i disag verlag	spears when the focus is lost. as a dropdownlist, it will appear BEHIND !		Tep Color	*	Bottom Celer	¥ v	Tooltip Type	¥ ¥	6	3
The other types will display a static Tpolip wh	en the field ge sys dropdown i y	ts the facus, which lists, if the tootlip o	erla;	spears when the focus is lost. as a dropdownlist, it will appear BEHIND !	Ŷ	Top Color AliceBlue		Bottom Calor BiueViolet		Toolfip Type MOUSEOVER	¥ ¥	0	

#### Example: Risk Register Tool Tips

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	L	el Name: (Feedback)	TooiTip Definitions		* Lists for	Regi	stør: Meedback Reg	ister			
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The other types will clipley a static Toollip v Due to a bug in the way internal Explorer di	when the flaid g plays dropdown	ets the focus, which d I lists, if the toolitp ove	isappears when the focus is is claps a dropdownfist, it will ap	opear BEHIND the list.							_
The other types will clapley a static Toolito v	when the fleid g plays cropdown * 1	jets the focus, which d	isopears when the focus is it	opeer BEHIND the list.			Bottom Color	•	Foottp Type	*	0
The other types will clipley a static Toollip v Due to a bug in the way internal Explorer di	when the fleid g plays cropdowr	ets the focus, which d I lists, if the toolitp ove	isappears when the focus is is claps a dropdownfist, it will ap	opear BEHIND the list.		*	Bottom Color	•	Feeltlp Type	•	0

Example: Feedback Tool Tips

#### To create a new tool tip



			List & Codes Mair	itenance				14	1
A type of Mouseover will display a n The other types will display a static Due to a bug in the way internat lixe	Toolio when the field gets the	focus, which	e field. h disappears when the focus is lost. avariaps a propriowniist, it will appear IBEH	ND the list.					
sel of the Field to show ToolTip on	▼ Top Tip		Bottom Tip	*	Top Color Ŧ	Dottorn Color Ŧ	Toolsp Type #		0
	*			•					
Label of the Field to show ToolTip	on								
Tep Tip								1	
Bottom Tip								~ ~	
Top Color									
Bottom Color									
	MOUSEOVER								

Regardless of which setting you are on, the field options will be the same. Label of the Field to show ToolTip on: Select the field or button that you wish to associate the Tooltip with

- 3. Bottom Tip: Enter the description for this tool tip.
- 4. Top Color: Select a colour for your Top Tip
- 5. Bottom Color: Select a colour for your Top Tip
- 6. **Tool Tip Type:** There are 4 types of tool tips that you can select it is recommended to select MOUSEOVER

To appear as an option in this list, a Template must exist under the 'General' tab or in the 'Incidents' register.

This list will have no effect on users created by an administrator.

#### Using HTML Codes to enhance your Tool Tips

Your tool tips can be enhanced by including one or more of the following: bold, underline or italicise words; add paragraphs; add line breaks; add bullets and numbering to separate text within a tool tip. Simple HTML code can be used to include these enhancements. On the next couple of pages are some examples of Incident Tools tips using HTML Code which you can replicate in your RiskMan

# TOOL TIP EXAMPLES FROM THE INCIDENT REGISTER

Тад	Example using the Tags	Sample tool tip		
Bold <b></b>	<b>Notification Date</b>	Notification Date The Date The Incident was Notified to Group Clinical Governance.		
Italics <em></em>	<em>risk</em> or <em>risks</em>	Click here to associate a risk with an incident Please select the <i>risk</i> or <i>risks</i> that this incident relates to		
Underline <u></u>	<u>risk</u> or <u>risks</u>	Click here to associate a risk with an incident Please select the <u>risk</u> or <u>risks</u> that this incident relates to		
Bold/Italic <b><em></em></b>	<b><em>Not Required</em></b>	Action Taken Specify any action taken to prevent a recurrence of this type of event. If no action is necessary, write Not Required		
Line break	Nominate the severity of this incident, using the <b><em>Incident Severity Rating</em></b> document. To view and select an Incident severity rating for this incident, click on the icon next to this document.	Outcome Nominate the severity of this incident, using the <i>Incident Severity Rating</i> document. To view and select an Incident severity rating for this incident, click on the icon next to this document.		
Paragraph Break with line of space	Nominate the severity of this incident, using the <b><em>Incident Severity Rating</em></b> document. To view and select an Incident severity rating for this incident, click on the icon next to this document.	Outcome Nominate the severity of this incident, using the Incident Severity Rating document. To view and select an Incident severity rating for this incident, click on the icon next to this document.		
Horizontal Rule <hr/>	Nominate the severity of this incident, using the <b><em>Incident Severity Rating</em></b> document. <hr/> To view and select an Incident severity rating for this incident, click on the icon next to this document.	Outcome Nominate the severity of this incident, using the <i>Incident Severity Rating</i> document. To view and select anIncident severity rating for this incident, click on the icon next to this document.		

More advanced examples on the next page



Tag	Example using the Tags	Sample tool tip
Bullet points <ul> <li></li></ul>	<ul><li><li><li><li><li><li><li><li><li><l< td=""><td><ul> <li>INCIDENT OUTCOME</li> <li>Please specify the immediate outcome of the incident</li> <li>Minimal: No harm, injury, loss or increased care.</li> <li>Minor:Injury, harm or loss sustained requiring increased care, observations.</li> <li>Moderate: Injury, harm or loss sustained resulting in increased length of stay and/or additional medical intervention.</li> <li>Major: Injury sustained resulting in disfigurement, permanent harm, surgical intervention or event constituting physical assault.</li> <li>Serious:Life threatening or fatal events and all events constituting a significant event.</li> </ul></td></l<></li></li></li></li></li></li></li></li></li></ul>	<ul> <li>INCIDENT OUTCOME</li> <li>Please specify the immediate outcome of the incident</li> <li>Minimal: No harm, injury, loss or increased care.</li> <li>Minor:Injury, harm or loss sustained requiring increased care, observations.</li> <li>Moderate: Injury, harm or loss sustained resulting in increased length of stay and/or additional medical intervention.</li> <li>Major: Injury sustained resulting in disfigurement, permanent harm, surgical intervention or event constituting physical assault.</li> <li>Serious:Life threatening or fatal events and all events constituting a significant event.</li> </ul>
Number points <ol> <li></li></ol>	<ol><li><li><b>Minimal:</b> No harm, injury, loss or increased care.</li><li><b>Minor:</b>Injury, harm or loss sustained requiring increased care, observations.</li><li></li></li></ol>	INCIDENT OUTCOME         Please specify the immediate outcome of the incident         1. Minimal: No harm, injury, loss or increased care.         2. Minor:Injury, harm or loss sustained requiring increased care, observations.         3. Moderate: Injury, harm or loss sustained resulting in increased length of stay and/or additional medical intervention.         4. Major: Injury sustained resulting in disfigurement, permanent harm, surgical intervention or event constituting physical assault.         5. Serious:Life threatening or fatal events and all events constituting a significant event.

## Defining templates for self-registered users

1. Click on the List Name drop down and locate Default template to apply to self-created users, based on selected site list

licon

There is also a Global Setting 'Users/Authentication/LDAP Details/200) The RiskMan Template to use when selfcreating new users.' This will be effective only if the site is not found in this list.

- 2. Click on the 0 🗎 🌣 🕹 🏦 List & Codes Maintenance 👔 List Name: Default template to apply to self-created users, based on selected Site. 💿 🛛 Lists for Register. • mally they will receive the 'Default' template for each register, and for General. Which Registers a default user gets can be of to specify the Site field then this list will be referred to and, if the Site is found, the 'Default' template name to apply is retriev some 2 or more Sites, one will be elected randomly. en will attempt to be applied for each register. If the template does not exist in any register, the 'Default' template will be applied, for in the fill, at lemble man our out meth the General' tab or in the includes' register. config If the dministrator. on/LDAP Details/200) The RiskMan Template to use when self creating new users.' This will be effective only if Site 
  Template To assign.
  This list has no rows. Add a row by clicking the 'Add New Row' icon . 🕂 att ♥ Create Filter
  - 3. Select the site and template to assign for that site
  - 4. Save or Discard the changes



During self-registration, if the user is allowed to specify their own site, then the above list will be referred to and, if the site is found, the Tempalte the user should be allocated to is retrieved from here.

Should the user choose 2 or more Sites, one will be selected randomly.

Should the site appear more than once in this list, one will be selected randomly.

For each Register, the system will attempt to assign he user to the defined Template. If the Template does not exist in a Register, the user will be assigned to the 'Defulat' Template instead.