Introduction

This reference guide is aimed at managers who will be responsible for managing users within RiskMan where RiskMan is not configured to use network logins. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from the *Help -> Reference Guides*

Note: Some of the naming conventions used in this document may not be the same as the ones in your RiskMan system; however, the concepts will still apply

How do I access the User Profiles to create, modify or delete a user?

To create a new user you will need to navigate to the Administration -> User Permissions -> User Profiles page

		ality Activity 👔 Risk 🚺 Feedbac	199	
		User Profile	s (General)	
elect User:		•	User Registry Save U	ser New User Delete User
User Name I	Only displaying first 500 user		Rebuild 'S	elect User' List Now
RiskMan Use	r Type Filter:	 Only Show Expired 	Usersi	
RiskMan Use User Positio		Only Show Expired Only Show Deleted		
User Positio		Only Show Deleted		

The User Profiles page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risk, Quality Activity; with an additional non-register specific tab called **General**. Depending on your permissions you may see all tabs or just some of these tabs

The **General** User Profile is used to assign User permissions and Restriction Details that are common across all Registers as well as the Administrative Permissions

The information under each of the tabs allows you to, create or modify a user and also to activate/de-activate a user for a particular register. Users that no longer work for your organisation are deleted under the **General** tab only. Below are the definitions of the sections that are included under the Register tabs:

- Filter fields Used to search for an active, deleted or expired user or users who have no permission under the specific Register User Profile e.g. Risk
- Login Details Used to enter the details of a new user or modify the details of an existing user
- **Current/Pending Delegation** Used to create a delegation on behalf of another user (this section will only display if the user has the appropriate permission)

- Restriction Details Used to restrict users' entry/ update or reporting of notifications/items/activities based on common fields throughout RiskMan e.g. Site/Region & Campus/Location restrictions
- Specific Restrictions (<u>not available</u> under the General and Feedback tabs) - Used to restrict users' entry/update or reporting of notifications/items/activities for a specific Register

Note: The Feedback User Profiles will have a Restriction Details section which will contain a combination of common and Feedback specific restrictions

- Field Settings (<u>not available</u> under the General tab) -Specify the status of a field e.g. Hide, Entry Required, Read Only, Optional Entry on a specific Register. Field Settings are usually dictated by the user's assigned template
- User Permissions Specify a user's permissions that are either common across all registers e.g. administrative permissions (this is done under the General tab) or specific to a Register. User Permissions are usually dictated by the user's assigned template

Clients who have a User Licence

If your organisation has a User Licence rather than a Site Licence you will be limited to the number of users that you can create in RiskMan.

If the number of users is close to the maximum or you have reached the maximum, the following message will appear at the top of your User profiles page.



If you have reached the maximum number of users you will be able to delete and modify existing user but <u>will not</u> be able to create a new user. You will have the option to purchase more licences by contacting RiskMan International Pty Ltd, or delete users that are currently not using RiskMan

How do I create a New User?

Users can be setup under any of the tabbed sections of the User Profile. However, when you do create a user, depending on your RiskMan setup, a user may only be activated for specific Registers e.g. Incident & Feedback, but not activated under the Risk or Quality Activity Registers. All users will be activated under the **General** tab

In this guide, it will be assumed

- A user is always activated under the Incident & Feedback Registers but not under the Risk & Quality Activity Registers
- The person creating, modifying or deleting a user has access to all the Register and General User Profiles

Creating a User

If you do not have permission to all the Register & General User Profiles, a user can be created under one of the Register tabs or the General tab.

Where a user is automatically activated e.g. under the Incident, Feedback & General tabs, they will be assigned the **"Default"** template. This will give the user the minimum access to RiskMan

If you wish the user to be assigned a different template then you will need to move between the Registers & General tab to assign the appropriate template

If your role is to provide Administrative support to RiskMan then we suggest that you have permission to all the Register and General User Profiles

General tab

The General User Profiles only contains the

- User permissions that are common across all Registers
- The Restriction Details that are common across all Registers
- The Administrative Permissions
- 1. Under the General tab press the New User 0 button

General	Incident	Quality	ACCIVICY	Risk	Feedback	
-		User Prot	files (General)		3 1	
Select User: New User 34 Users	v found.		User Regi	stry Save	User New User D	elete User
User Name Filter:			Rebuild 'Select U	ser' List Now		
RiskMan User Type Filter:		✓ ○	Only Show Expired User	-51		
User Position Filter		V (Only Show Deleted User			
User Created After Date:		10	Include Deleted/Expire	d Users in Search		
User Has Facility Restriction:		~	Exclude Deleted/Expire	d Users from sear	schu	
Login Details	2					
User Display Name:				er's position is:		v
User Name:			This user's RiskHa	an User Type is:	Reapply the above template per	N number land
Do you want to change Passwo					Reapply the above template per	missions
Password Never Expires:	Last Changed: Nev	wr.				
Password Never Expires: Force Change Password:						
Email Address:	-		Alternate	Email Address:		
Phone Number:] '	Hobile Number:		
Profile Duration:	O Expires On			Start Page:	Incident Entry 👍 💌	
	Never Expires				· ·	
Current/Pending Delegation						
Edit Delegation						
Has Delegated Authority To Da	te To Start Dat		as a Delegate for		Date To Start Date To	End
Not Delegated		Not A Dele	gate			
Restriction Details	5 (All restrictions	s in this section are shared betwe	en all modules.)			
No Restrictions in this area have an	w selected Zema					(1
Entry/Update Restrictions	acility Restriction:		Locat	tion Restriction:		
F	acility Restrictions		Local	tion Restriction:		
Cabell Huntington Acadia Private	acility Restriction:		Local	tion Restriction:		
Cabell Huntington Acada Private Eucalystus Lodge	acility Restriction:		Local	tion Restriction:		
Cabell Huntington Acadia Private	acility Restriction:		Local	tion Restriction:		
Cabell Huntington Acada Private Eucalystus Lodge	acility Restriction:		Local	tion Restriction:		
Cabell Huntington Acada Private Eucalystus Lodge	acility Restriction:			tion Restriction:		
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Codel scripting code scripting water house water house water house Reservices Codel screening Codel screening Screen	nstriction: Restriction: voices	Specia Acide Aged Carlos Anterpay, Exercising & AnterShelts 855 855	In Restrictions	Filter List	d Care Services. d Psychiatry Services. d Health tomical Pathology	

- 2. Enter the user's details in the Login Details 2 section
 - Username: Suggest using the same naming conventions as your network logins
 - Password: Your Administrator has the ability to set the complexity and expiration of passwords used for RiskMan Standard accounts if desired. The settings can be modified via *Configuration > Global Settings > Users > Password Management*. Please refer to the Global Settings Descriptions Document for a detailed explanation for configuring password complexity rules. Below is some additional information about RiskMan passwords:
 - You can opt for passwords never to expire in a User Profile. This will override any password expiration setting you have enabled in the Global Settings:

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User Display Name:	System Manager
User Name:	Manager
Password:	••••••• Last Changed: 28 Feb 2014 12:06
Password Never Expire	25

- Passwords are case sensitive
- Password recovery is not possible; if a user has forgotten their password it will need to be reset
- You can force users to change their password when they log in for the first time:

Login Details	
User Display Name:	Lauren
User Name:	Lauren
Do you want to change Password	l: 🗌 Last Changed:
Password Never Expires:	\checkmark
Force Change Password:	\checkmark

When this box is checked, the next time the user logs in to the system, they will be required to create a new password for their account before they can continue. This change is not controlled by any settings and will be applied automatically.

- Users can change their password if they want. However, if a user wants to change their password they cannot use any of their last 12 passwords. This change is not controlled by any settings and will be applied automatically.
- It is possible to add to the ability to prevent users from changing their password too frequently. When enabled, users will only be able to change their passwords once a day. This prevents users, when forced to change their password, from imediately changing it back. This is controlled by Global Settings (See Global Settings guide).
- It is possible to lock out users who enter the wrong username and password combination successive times. The number of times they can enter the wrong combination before lock-out is defined in Global Settings (See Global Settings guide).
- Email Address: It is advisable that all managers have an email address registered with their User Profile so they can receive email notifications from RiskMan
- This user's RiskMan User Type is ②: Select the template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All restrictions under the Restriction Details section will either need to be manually selected for that user, or will need to be applied through the "Apply Template Changes" option which will affect all users on that template - refer to the RiskMan User Templates Guide

- Start Page ④: A default start page (the page the user will be presented with when they first logon to RiskMan) may display depending on the assigned template. This can be changed if required
- 3. If required, select the user's overall Restriction Details
 i.e. the restrictions that are <u>common</u> across all Registers. Once selected, they will be applied across all Registers
 - Entry/Update Restrictions: If the user can only enter or update Register specific notifications/ items/activities based on Sites and/or Locations, select accordingly. To select more than one item in a list hold your CTRL button and click on the list items

To view the Location restrictions

- Click on the **Filter List** button **1** under the Location Restriction box
- In the pop-up window, select the Site 2 and press the Filter list 3 button
- The list of Locations will populate into the **Restriction Details 4** section
- Highlight as required (Hold CTRL key if you wish to select more than one Location)

ry/Update Restrictions	
Facility Restriction:	Location Restriction:
Cabell Huntington Acada Private Eucalyputs Lodge Wattle Private	Filter List
Filter Facility List	
Hospital	0
Facility	6
	Filter List
striction Details (All res	rictions in this section are shared between all modules.)
Restrictions in this area have any selec	ed items.
ry/Update Restrictions Facility Restriction:	Location Restriction:
Cabell Huntington Acada Private	AC1 AC2 AC3

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 Reporting Restrictions: If the user has access to running Register specific Reports, you can restrict their access to what they can view in the report based on any of the displayed fields.

To view the Location restrictions, follow the steps described above under the Entry/Update restrictions

Note: Additional **Entry/Update** and **Reporting Restrictions** can be added under the **Specific Restrictions** section under each of the Register User Profiles. The Specific Restrictions section is not available under the **General** tab

4. To save the user, press Save User 6

Assign a Register Specific Template for the New User

Once the user has been created under the **General** tab, you will need to move between each of the other Registers to ensure the user has the correct permissions to the other Registers, where applicable.

The following pages describe setting up the new user under all the Registers that the user will have permission to access.

Note: Because RiskMan is configured according to the requirements of each client, the following scenario may not directly apply to you. It is likely that you will have fewer or more Registers than what is depicted in this User Guide.

Incident tab

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Click on the Incident tab

 and the newly created user will be displayed (we have assumed the user is automatically active under this Register)

					_		
Genera	al 🚺 Inci	dent 🚶	Qualit	y Activit	ty	Risk	Feedback
		U	ser Profiles	(Incident)		6	
Select Users New Use	→ 34 Users found.			User Registe		e User New I	Delete User
User Name Filters				Rebuild 'Select Use			
RiskHan User Type Fi	Iten			Show Users with no p	permissions in	this register:	
User Position Filter:			~				
User Created After Da				de users with no Perr		arch:	
User Has Facility Res	viction		⊻ ® Only	show active users in	searchi		
Login Details							
User Display Name:				This user	r's position is:		V
User Name				This user's RiskHan	User Type ist	Dataut 2	V
							ve template permissions
Do you want to chang	n Passorord: 🗌 Last Chang	ade Norma					
Password Never Expl							
Force Change Passwo							
Email Address:	_			Alternato Fe	mail Address:		
Phone Number:					obile Number:		
Profile Duration:	C Expires On					leakdwet Entry 🙆	
	 Expires On Never Expire 					9	
Current/Pending Dele	gation						
Edit Delegation							
Has Delegated Autho	ity To Date To Start	Date To End	Is acting as a D	legate for		Date To Start	Date To End
Not Delegated			Not A Delegate				
Restriction Details	(Al re	etrictions in this section are	shared between all m	odules.)			
No Restrictions in this as	as have any selected items.						
Specific Restrictions	5 (Restr	ictions in this section are s	pecific to the register.)				
Entry/Update Restric	linas						
	sd" Incident items in Inbox.	0					
Show only "Alert	ed" Incident items in Inbox. Incident Involved	Restriction					
	atient/Client						
	italf Hember Iolanteer						
	roperty invironmental						
	liquipment intervention						
6	Ion-Person						
Reporting Restriction							
		0					
Show only "Alert	ed" Incident items in Report Incident Involved						
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[lient						
	office//Client	^					
	lasident Itaff Hember						
	iolanteer Jelative/Visitor						
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	Restrict to these	Reports			Restrict	to these Journal Type:	
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Alecident Involved	Entry Required			Hedical Record #	Entry Rea	ured V	
AFirst Name	Entry Required			Initials	Dont Displ		
and the second	and a state of the				and a state	1. L.L.	

- 2. Assign the appropriate Incident Template in the Login Details section
 - This user's RiskMan User Type is 2: Select the Incident template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the "Apply Template Changes" option which will affect all users on that template - refer to the RiskMan User Templates Guide

- Start Page S: If this was selected under the General tab it will also display here. If not, you can select a start page from this list.
- Restriction Details (4): If the user does not have any Restriction Details then this section will be collapsed.
 - To expose the Restriction Details section click on the section.

tion Details (All restrictions in this section are shared between all modules.)

• If the user has restrictions this section will be exposed. If you make any changes to these

¥

restrictions they will affect all Registers the user is active under (as these are the common restrictions)

pdate <u>Restrictions</u> Facility Restriction:	Location Restriction:	
Cabell Huntington Acada Private		
Eucelyptus Lodge Wattle Private		
	Filter List	
ng Restrictions		
Facility Restriction:	Location Restriction:	
· · · · · · · · · · · · · · · · · · ·		
Cabell Huntington		
Eucalyptus Lodge Wattle Private		
tratue Pirate		
	Filter List	
Aggregate Restriction:	Specialty Restriction:	Service Restriction:
Administrative Services	Acute Aged Care Service	Aped Care Services.
Ambulatory & Community Servic	Allergy, Immunology & Respirat	Aged Psychiatry Services.
carpark	Anaesthetics	Allied Health
Finance	BES *	Anatomical Pathology *

- 4. **Specific Restrictions (5)**: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and/or Journal Type Restrictions as required
 - Show Only "Alerted" Incidents in Inbox: This
 option should <u>only</u> be checked if the user has
 access to the Incident Inbox (e.g. Risk/Quality
 Managers) and should only see incidents they have
 been alerted to
 - Show Only "Alerted" Incidents in Reports: This option should only be checked if the user has access to the Incident Reports (e.g. Risk/Quality Managers, Executives, Line Managers) and can only report on incidents they have been alerted to
 - If you restrict the list of reports the user <u>WILL NOT</u> have access to the Incident Custom Report Builder on the Incident Reports page to create, modify or delete Custom Report Layouts
- 5. To save the user, press Save User 6

Feedback Tab

Click on the Feedback tab

 and the newly created user will be displayed

General	Incide	ant Ou	ality Acti	vitv Risk	eedback	
General	Inclue				eeuback	
			User Profi	les (Feedback)	4	
Select User: New Use	240 Users fou	₩ ad.		User Registry 5	lave User New User	Delete User
User Name Filter:				Rebuild 'Select User' Lis	at Now	
RiskMan User Type Filb	eri		~	Only Show Users with no permi	issions in this register:	
User Position Filter:			×			
User Created After Date	e1			O Include users with no Permissi	ons in Search:	
User Has Organisation	Restriction		×	Only show active users in search	cha	
Login Details						
User Display Name:				This user's position is:		
User Namei				This user's RiskMan User Type is:	Default 2	3
					Reapply the above templa	
Do you want to change	Password: 🗌 Last	Changed: Never				
Password Never Expire	s: 🗌					
Force Change Password	d: 🗆					
Email Address:				Alternate Email Address:		
Phone Number:				Mobile Number		
Profile Duration:	O Expir	es On		Start Page	Incident Entry	
	Neve	r Expires				
Current/Pending Deleg	ation					
Edit Delegation Has Delegated Authorit	ty To Date To Start	Date To End	Is acting a	is a Delegate for	Date To Start	Date To End
Not Delegated			Not A Dele	pate		
Restriction Details		(All restrictions in this sectio	n are shared between all m	odules.)		
No Restrictions in this area ha	we any selected items.					
Specific Restrictions	3	(Restrictions in this section	are specific to the register.)			
Entry/Update Restriction	ons					
Show only "Alerted		Inbox. 🕜 dback Restriction:				
	Complaint					
0	Compliment Suggestion					
	Restrict b	o these Reports:		Rest	rict to these Journal Types:	
6	Sub-Report) Actions Sub-Report) Associat Sub-Report) Feedbac Sub-Report) Journal	ed Risks k Items	0	Corresponden File Notes	ce	
Who logged the Feed						
the ree	IDACK!				Hide Who logged the	Feedback2 Section:
Logged By		Entry Require		A Position	Entry Require	ecosece? Section:
Contact Phone Numl					runt wedang a	
Pucontact Phone Num	Der	Optional Entr 💌				

- Assign the appropriate Feedback Template in the Login Details section ② (refer to the description under the Incident Tab)
- Restriction Details
 In this version, there is no Specific Restrictions section. The Site & Location Entry/Update or Reporting restrictions will be carried across from all other Registers. In addition, on the Feedback User Profile, the following restrictions can be included
 - Show Only "Alerted" Feedback in Inbox: This
 option should only be checked if the user has
 access to the Feedback Inbox (e.g. Risk/Quality
 Manager, Consumer Advocate) and should only
 see feedback they have been alerted to
 - Show Only "Alerted" Feedback in Reports: This option should only be checked if the user has access to the Feedback Reports (e.g. Consumer Advocate, Risk/Quality Manager, Executives, Managers) and can only report on feedback they have been alerted to
- 4. To save the user, press Save User ④

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<u>Risk Tab</u>

In our scenario, users are **<u>not</u>** automatically activated under the Risk Tab.

- 1. Click on the Risk tab **0**
- A message will display at the top of the page specifying that the user you have created does not have a record in the Risk Register User profile i.e. they are not activated under this Register ²
- 3. If you would like this user to be an active Risk Register user, press the **Save User 6** button



Assign the appropriate Risk Template in the Login
 Details section () (refer to the description under the Incident Tab)

General In	cident	Quality	Activity	Risk	Feed	lback		
			User Profil	es (Risk)		7		
Select User: New User 29 Users fo	vand.			User R	egistry Sav	re User	New User	Delete User
User Name Filter:				Rebuild 'Selec	t User' List Now			
RiskMan User Type Filter:			✓ ○ 0nly	r Show Users with	no permissions in	this register:		
User Position Filter:			~					
User Created After Date:					Permissions in Se	arch:		
User Has Facility Restriction:			✓ ● Only	r show active use	rs in search:			
Login Details								
User Display Name:					user's position is:			×
User Name:				This user's Risk	(Man User Type is:			~
Do you want to change Password						Reapply t	he above tempi:	ate permissions
Password Never Expires:	Last Changed:	Never						
Force Change Password:								
Email Address:				Altern	ate Email Address:			
Phone Number:					Hobile Number:			
Profile Duration:	C Expires On				Start Page:	Incident Entry		
	Never Expires							
Current/Pending Delegation								
Edit Delegation Has Delegated Authority To Date	To Start	Date To End	Is acting as a D	elegate for		Date To Star	d i	Date To End
Not Delegated			Not A Delegate					
Restriction Details 6	(All restric	tions in this section i	are shared between all r	nodules.)				
No Restrictions in this area have any	selected items.							۲
Specific Restrictions 6	(Restrictio	ins in this section are	specific to the register.)				
Entry/Update Restrictions								
Show only "Alerted" Risk ite	ms in Inbox. 🕝 Type Of Risk Restrict	tion:						
Operational Strategic Provisional Project Risk								
Reporting Restrictions Show only "Alerted" Risk ite	ms in Reports, 🥝 Type Of Risk Restrict	tion:						
Operational Strategic Provisional Project Risk								
	Restrict to these Rep	ortsi			Restrict 1	to these Journal 1	lypesi	
(Sub-Report) A (Sub-Report) A (Sub-Report) A (Sub-Report) A (Sub-Report) C (Sub-Report) C (Sub-Report) C (Sub-Report) C (Sub-Report) C	ctions A4L ctions A4P ssociated Incidents A4I asociated Incidents A4I atalyst A4L atalyst A4L onsequences A4L onsequences A4P ontrols A4L				General Comments Task Lagals Discussion With Insur Correspondence Sent Control Review Risk Review	rer I		
A Details								
							ні	de Details Section:
AID Before Higration Don	t Display 🔽							

- Restriction Details S: If the user does not have any Restriction Details then this section will be collapsed
 - To expose the **Restriction Details** section click on the section.
 - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
- 6. **Specific Restrictions (**): This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and Journal Type Restrictions as required
 - Show Only "Alerted" Risk Items in Inbox: This option should <u>only</u> be checked if the user has the following Management Permission: Can Review Entries in Inbox (e.g. Risk/Quality Managers, Executives) and should only see Risks they have been alerted to
 - Show Only "Alerted" Risk Items in Reports: This option should only be checked if the user has access to the Risk Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on risks they have been alerted to
 - If you restrict the list of reports, the user <u>WILL</u>
 <u>NOT</u> have access to the Risk Register Custom
 Report Builder on the Risk Reports page to create, modify or delete Custom Report Layouts
- 7. To save the user, press Save User 🔗

How do I modify an existing user?

To modify an existing user, ensure you are on the Administration -> User Permissions -> User Profiles page

Modifications that can be done under any of the Register tabs where the user is active

- Modifying the user's Login Details: All the details under the Login Details section can be modified <u>except</u> for the Username. If you wish to modify the Username you will need to delete the User Profile and create a new one
- Creating or modifying a delegation for a user: This can be done under any Register tab where the user is active, provided you have the Administrative User Permission: Can modify other users Delegates under the General tab
- Modifying the Entry/Update and Reporting Restrictions under the **Restriction Details** section, as these are common across all Registers

Modifications that need to be done under the specific Register tab

- Changing the user's assigned template in the Login Details section
- Activating a user under a specific Register e.g. Risk or Quality Activity Registers
- Modifying the Entry/Update and Reporting Restrictions under the Specific Restrictions section as these are specific to a Register

It is <u>strongly recommended</u> that User Permissions and Field Settings are <u>not</u> modified under a specific User Profile, if the user is assigned to one of your main Templates e.g. Default, Manager, Executive, Risk Manager. This is because if any of these templates are modified and an "Apply Template Change" is done across RiskMan, the user's field settings and user permissions will be overwritten.

If the user is assigned a template where the users on this template have special needs that are dictated by their User Profile, then you can modify the user's individual field settings and user permissions. Ensure the template that these users are assigned to is **never modified**

Searching for a User



Under any of the Register or General tabs, locate the user

- 1. Select the user from the Select User **1** list or
- 2. Enter filter criteria in **one** of the filter fields **2**
 - Press "Rebuild 'Select User' List Now" 6
 - Select the user from the Select User 0 list

Modifications: Template Changes & Specific Restrictions

- 1. Click on the specific Register tab **0** and locate the user
- Modify the Template changes in the Login Details ② as required
 - This user's RiskMan User Type is: Select the template the user will be assigned to for the selected Register. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide**

- 3. Modify the Specific Restrictions ⁽⁶⁾ as required
- 4. Press Save User 4

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Genera	III	ncide	nt YQu	ality	Activity	Risk	Feedb	back	
			U	ser Prof	iles (Incident)	4		
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Example: Modifying a User under the Incident Register User Profile

Modifications: Login Details & Restriction Details

- Click on the specific Register tab 0 and locate the user
- 2. Modify the Login Details 2 as required
 - All fields in the Login Details section can be changed except for the Username. This cannot be changed because the username can be linked to Register Items
 - Template changes should be done under the respective Register or General tab - refer to the section <u>"Modifications: Template Changes &</u> <u>Specific Restrictions"</u>

Note: Advise that you <u>do not</u> modify the field settings or the user permissions as these are controlled by the User Templates and could potentially be overwritten if the templates are modified

- 3. Modify the **Restrictions Details (**) as required
- 4. Press Save User 4

User Profiles (General) Seventses Seventses Seventses Seventses Seventses S	General	Incider	nt Qual	ity Activity	Ris	k T Ee	edback	
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Modifications: Adding or Modifying a Delegate for a User

If a Manager is on annual leave or not available to perform their RiskMan duties for a period of time you can

- Check to see if the Manager has already assigned a delegate and if not assign a delegate on their behalf; or
- Modify a manager's delegation if the selected delegate becomes unavailable e.g. on sick leave

To assign a delegate

- 1. Locate the user under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Press the Add Delegate 2 button
- Search for the delegate using the Filter icon and then select the user from the Delegate list ⁶
- Enter the delegation period ④ (End Date should be the date the user is returning)

6. Press Save 6

									- 11
			User Profile	es (Genera	al)				- 1
Select User: Hayden, / 1 Users fo	Anne (ahayden) und.	•		User Regist	try 5	lave User	New User	Delete User	
User Name Filter:	havde	👩 Manage Delegates	s Webpage Dialog			-	-	And in case of the	-
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User Has Campus* Re	striction:		staff member as leone anna (Leone Ani		• 8 🖪			I	
			Tuesday, 22 May 2012		•••				
Login Details			Thursday, 31 May 201:	4				I	
		End Date	,	_	• •				
User Display Name:	Hayden, Ann Format as (L	L							_
User Name:	ahayden	Delegate's Username	e Delegate		-	ition start date	Delegal	tion end date	4.
Password:	••••			There are no	items to sho	win this view			_
Email Address:	anne@riskm								
Phone Number:									
Profile Duration:	Expires 0								
	Never Ex								
Current/Pending Dele	gation								
Edit Delegation									

To modify/delete an existing delegate

- 1. Locate the User under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Double click the **Delegate's Name 2** in the list
- If you wish to modify the details of the delegate, make any respective changes and press Update (5)
- 5. If you wish to delete the delegation press Delete 4

			User P	rofiles (Ge	neral)				L
elect User: Hayden, A 1 Users fo		•		Use	r Registry	Save User	New User	Delete User	L
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Modifications: Activate a User under a Register

Users can be active under some Registers e.g. Incidents & Feedback but not necessarily active in other Registers e.g. Risk and Quality Activity. This will depend on how your system is setup.

All users will be active under the General & Feedback tabs

If a user is not active under a Register, then they can be activated as follows:

1. Click on the specific **Register tab 0** e.g. Risk

General Incident Quality Ac	tivity 🚺 Risk 🚺 Feedback		
	User Profil	oc (Rick)	
	User From	es (RISK)	
Select Useri	-	User Registry Sa	ve User Delete User
1066 Users found.			
User Name Filter:	Only She	w Users with no permissions in this r	egister: Rebuild 'Select User' List Now
RiskMan User Type Filter:			
User Position Filter:			
User Created After Date:	Include a	sers with no Permissions in Search:	
User Has Organisation* Restriction:	• Only she	w active users in search:	

- 2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
 - Enter the user's first or last name in the User
 Name Filter ⁽²⁾ field
 - Check the "Only Show Users with no permissions in this register" (5) option
 - Press the Rebuild Select User List Now 4 button

		Reports Help Log Out	USER: System	i Manager (Manage
General Incident C	Quality Activity Risk	Feedback User Profiles (Risk)	Ary Save User New User	Delete User
4 Users found. User Name Filter: RiskMan User Type Filter:	david 2	Only Show Users with no permis		
User Position Filter: User Created After Date:		 Include users with no Permissio 		
User Has Organisation* Restriction:	(Only show active users in search 	bi	

- 3. Select the user from the Select User ⁶ list
- 4. Press Save User 6
 - A message will display to inform you that the User is now activated

General Incident Quality Activity Risk Feedback User Profiles (Risk) @ "B there is a state of the file of th

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CRLDatix RISKMAN REFERENCE GUIDE TO USER MANAGEMENT (Non-Network Logins)

 If required, modify the User's Profile as appropriate e.g. Assign the appropriate template in the Login Details section and press Save User

How do I delete a user?

Users can ONLY be deleted from the General tab

If you delete a user from any of the Register tabs it will **only de-activate** them from that specific Register

If you wish to delete a user who no longer works for your organisation then prior to deleting the user the following should be checked

- Does the user have staff reporting to them or they report to a manager? Check under the Administration -> Manager Staff -> Staff Hierarchy page and edit under the Administration -> Manager Staff -> Edit Staff page. Remove all relationships for that user
- Does the user have an alert assigned to them? Check under the Administration -> Alert Management page.
 Either remove the user from the allocated user list for that alert and assign a replacement, or delete the alert

To de-activate a user from a Register

- Click on the specific **Register** tab e.g. Risk, Incident, Quality
- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields (2) and Press "Rebuild 'Select User' List Now" (2). Select the user from the Select User (2) list
- 3. Press Delete User 6
- 4. A **message (**) will display to let you know that this user has been deleted from this Register only.

10	🕈 🥥 My Workspace Manag	ement Administration Report	s Help Log Out	USER: System Manager (Manager)
	General Incident Q	uality Activity Risk F	eedback	
			er Profiles (Risk) David Binns have been saved.	6
	Select User: Binns, David (David Binn 13 Users found.		User Registry Save User	New User Delete User
ſ	User Name Filters	david	Only Show Users with no permissions in this register:	Rebuild 'Select User' List Now
J	RiskMan User Type Filter:	-		
₹	User Position Filter:			
	User Created After Date:		Include users with no Permissions in Search:	
ı	User Has Organisation* Restriction:	· ·	Only show active users in search:	
ſ	Login Details			
1	User Display Name: Binna, Davi Format as	id (Lastname, Firstname)	This user's position is	Manager 👻
~.		and the set of the set	This user's Risking User Type in	CLO

General Incident O	ality Activity T Risk T F	eedback			
	Us	er Profiles (Risk)			
The User Profile 'David Binns' for register Risk has been marked as deleted (not physically deleted), and Can be restored if necessary.					
User Name Filter:	david •	Only Show Users with no permissions in this regist	Rebuild 'Select User' List Now		
RiskMan User Type Filter: User Position Filter:					

To delete a user from RiskMan

Deleting a user from RiskMan can only be done via the General tab

1. Click on the General **0** tab

General Inci	dent Quality Activ	vity Risk Feedback User Profiles (General)	ß
Select Users Binns, David 18 Users for	(David Binna)	• User Re	
User Name Filter:	David		A Rebuild 'Select User' List Now
RiskMan User Type Filter	1	Only Show Expired Users	•
User Position Filter:		 Only Show Deleted Users: 	
User Created After Date	1	Include Deleted/Expired Users in Sea	arch:
User Has Campus® Rest	ictions		search:
<u> </u>			

- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields 6 and Press "Rebuild 'Select User' List Now" 4. Select the user from the Select User 2 list
- 3. Press Delete User 😏

If the user has **not used RiskMan** they will be deleted from the database.

General 🚺 Incident	Quality Activity Ris	lisk Feedback				
		User Profiles (General)				
The User Profile 'David Binns' has been deleted.						
ielect User: 17 Users found.	•	User Registry Save User New User Delete User				
User Name Filter:	David	Rebuild 'Select User' List Now				
RiskMan User Type Filter:		Only Show Expired Users:				
User Position Filter:		Only Show Deleted Users:				
User Created After Date:		O Include Deleted/Expired Users in Search:				
User Has Campus* Restriction:		O Exclude Deleted/Expired Users from search:				

If the user <u>has used RiskMan</u> then their user profile will be flagged as deleted and can be restored if required.

General Incident		isk Feedback					
		Harry Des files (f					
		User Profiles (G	eneral)				
The User Profile 'anne' has records in RiskMan.							
In order not to lose the historical record, it has been marked as deleted (not physically deleted), and							
	can be restored if necessary.						
Select User:		ii be restored ii i		Save User New User Delete User			
Select User: 17 Users found.		n be restored in		Save User Delete User Delete User			
			User Registry	Save User New User Delete User			
17 Users found. User Name Filter:	•		User Registry	,			
17 Users found. User Name Filter: RiskMan User Type Filter:	•	• Only Show Expired Use	User Registry Re	,			
17 Users found. User Name Filter: RinkMan User Type Filter: User Position Filter:	•	Only Show Expired Use Only Show Deleted Use	User Registry Re FSI	,			
17 Users found. User Name Filter: RiskMan User Type Filter:	•	• Only Show Expired Use	User Registry Re FSI	,			

How do I restore a deleted user?

If a user was been deleted from RiskMan from the **General** tab and their User Profile was flagged as deleted, it will need to be restored under the **General** tab and then restored under each of the other Register tabs as required

To restore a user that was flagged as deleted from RiskMan

- 1. Click on the **General 0** tab
- In the Filter Criteria section check "Only Show Deleted Users" ②
- 3. Press the Rebuild 'Select User' List Now ⁶ button
 - The Select User ④ list will now show all users who have been flagged as deleted. Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users

General Incident Quality	Activity Risk Feedback	
	User Profiles (General)	
elect Useri	User Registry	Save User New User Delete User
User Name Filter:	B	build 'Select User' List Now
RiskMan User Type Filter:	Only Show Expired Users:	
User Position Filter:	Only Show Deleted Users: 20	
User Created After Date:	Include Deleted/Expired Users in Searchi	
User Has Campus [®] Restriction:	Exclude Deleted/Expired Users from search:	

4. Press the Undelete User ⁶ button

😤 😜 My Workspace Manag	ement Administration Reports Help Log Out	USER: System Nanager (Manager)
General Incident	Quality Activity Risk Feedback	î
	User Profiles (General)	6
Select Useri anne (anne) v 1 Users found.		User Registry New User Undelete User
User Name Filter:		Rebuild 'Select User' List Now
RiskMan User Type Filter:	 Only Show Expired Users: 	
User Position Filter:	Only Show Deleted Users:	
User Created After Date:	Include Deleted/Expired Users in Search	1
User Has Campus® Restriction:	 Exclude Deleted/Expired Users from sea 	archi .
and the second s	(This user was deleted on 22 May 201 You cannot save any changes. Undelete first if changes re	quired.

- The User is now restored ⁽³⁾ under the General & Feedback tabs
 - If there are **no changes to the user's profile**, it will **not be necessary** to press the **Save User** button
 - If you wish to make changes to the user's profile, modify as required and press Save User
- Repeat steps 2 5 under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

My Workspace Management J	Administration Reports Help Log Out	USER: System Manager (Mar
General Incident Quality	Activity Risk Feedback	
	User Profiles (General)	
	6 User Undeleted.	
elect Useri anne (anne) 👻	User Registr	ry Save User New User Delete User
User Name Filter:		Rebuild 'Select User' List Now
RiskMan User Type Filter:	 Only Show Expired Usersi 	
User Position Filter:	 Only Show Deleted Users: 	
User Created After Date:	Include Deleted/Expired Users in Search	1
User Has Campus® Restriction:	 Exclude Deleted/Expired Users from sea 	rchs
opin Details		
ser Display Name:		This user's position is:
Format as (Lastname,)		er's RiskMan User Type Isi Risk Manager 🗸 👻

To reactivate a user under a specific Register

- Click on the specific **Register** tab e.g. Risk, Incident, Quality
- 2. In the Filter Criteria section check the **"Only Show** Users with no permissions in this register" option
- 3. Press the Rebuild 'Select User' List Now button
 - The **Select User** list will now show all users who do not have permission to the selected Register
 - Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users

- 4. Press the Undelete User button
- 5. The User is now activated under the selected Register
 - If there are **no changes to the user's profile**, it will **not be necessary** to press the **Save User** button
 - If you wish to make changes to the user's profile, modify as required and press Save User

Modifying the Field & Section Labels/Colours on a Register Form

The label of a Field or Section Name and the background

colour of a Section can be modified if the following icon experience appears in front of the Label

A Who Was Affected?	
Lincident Involved	Entry Required 👻
First Name	Entry Required 👻
/surname	Entry Required 👻
Born of Birth and the second start and second	. Cotw.Required

Example: Fields on the Incident Entry form

To be able to modify the label of a field or background colour of a section on a Register form

- The user requires the following Administrative Permission under the General tab: Can Modify Global Settings
- A user profile needs to be open in the respective Register
- 1. Click on the respective **Register 0** tab
- 2. Select any user from the Select User 2 list

General Incident Quality Activ	vity Risk Feedback	
	User Profiles (Incident)	
Select Useri Hayden, Anne (ahayden) 2	• User Regis	try Save User New User Delete User
User Name Filter:	Only Show Users with no permiss	sions in this register: Rebuild 'Select User' List Now
RiskMan User Type Filter:	*	
User Position Filter:	*	
User Position Filter: User Created After Date:	 Include users with no Permission 	is in Search:

To modify a field label

1. Click on the 4 icon 1 next to the respective field

Summary	, 0	Entry Required 🔽
ADetails		Optional Entry 🔽
Edit Field Deta	il	×
Entry		
Title 🕢	Details 3	×
Report		
Title 🕜	Details 2	
	Display 🕡 🗹 Condition 🕡 🗹 Group 🔞 [
Alert		
Title 🕜	Details 4	
	Display 🭘 🖌 Condition 🍘 🖌	
Advanced		
Post Cell 🕜	<img alt="Check Spelling" parent.fnsp<="" src="images/spellcheck.gif</td><td>onclick=" td=""/>	
Script 🕜	onfocus="parent.fnPreSpellCheck(this);"	\sim
	ld 🝘 🛛 Obj Class 🔞	
	TD Class 🔞 TR Class 🔞	
	SAVE	CANCEL

- 2. Enter the label in the **New Title Text** ⁽²⁾ field (*this is the field on the respective Register form*)
- The new title should be reflective in the Reports and Alerts, so modify the New Reporting Title ③ and Alert Title ④ fields accordingly
- 4. If your Entry form has more than one label with the same name, ensure the labels for the **Alert Title** and **Report Title** are such that users are able to distinguish which Entry form label the field is referring to (refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)

	Hide Key Personnel Section	on:
Risk Owner Risk Coordinator Opened By Closed By	Dont Display Image: Control Display Image: Controw I	
Edit Field RRN	otifyLvI10fAI	
Entry		
Title 🕜	Notify of Associated Incidents	×
Report		_
Title 🕜	Notify Accountable Executive of Associated Incident	٦
	Display 🥝 🖌 Condition 🥥 🖌 Group 🍘 🖌	
Alert		_
Title 🕜	Notify Accountable Executive of Associated Incident	
	Display 🍘 🖌 Condition 🍘 🗸	
Advanced		_
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	ld 🝘 📃 Obj Class 🖗]
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		-
	SAVE CANCEL	

Entry		
Title 🔞	Notify of Associated Incidents	×
Report		
Title 🕜	Notify Accountable Executive of Associated Incident	
	Display 🕡 🖌 Condition 🔞 🖌 Group 🔞 🖌	
Alert		
Title 🕜	Notify Accountable Executive of Associated Incident	
	Display 🝘 🖌 Condition 🝘 🖌	
Advanced		
Post Cell 🕜		-
Script 🕜		
	ld 🝘 📃 Obj Class 🔞	
	TD Class 🝘 TR Class 🔞	

Example: "Notify of Associated Incidents" referring to the Responsible Manager on the Risk Entry form

 If a field label is determined by the Global Settings e.g. Site, Location, Program; the Title Text, Report Title and Alert Title will be displayed in a similar way to that in the example below of the "Site" field

Edit Field Emp	loyeeSite						×
Entry	100 01 N						
Title 🕜	*GS_ SiteName	;					
Report							
Title 🕜	*GS_SiteName	•					
	Display 🕜 🔽	Condition 🕢	\checkmark	Group 🕜	\checkmark		
Alert							
Title 🕜	*GS_ SiteName	•				×	
	Display 🕜 🔽	Condition 🕜	\checkmark				
Advanced							
Post Cell 🕢						0	
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	ld 🕜		0	bj Class 🕜)		
	TD Class 🕜		1	FR Class 🕜)		
				C ••		Californi	
				SAV	/E	CANCEL	

 If you make a change to any of these labels, it will only affect the label on that Register Entry form and will <u>NO</u> <u>LONGER</u> obey the Global Settings label. An example where this may be useful

Global Settings = Site where Incident Occurred

This would be useful on the Incident Entry form but not on the Risk Register, Feedback Entry or Quality Activity form. You might want to call this field

- Site of Risk in the Risk Register
- Site on the Quality Activity form
- Site where Feedback is initiated in Feedback*
- 8. Press Save when complete

Accountable Executive on the Risk Entry form

To modify a Section Title/Colour or Background Colour

1. Click on the 🌆 icon 🛈 next to the Section Title

🖞 Dates 🌔	
Admission Date	Dont Display 🗸
Incident Date	Entry Required 👻
Notification Date	Dont Display 🗸
Date Closed	Dont Display 🗸

2. Modify the label in the **Current Section Title 2** field (*this is the field on the respective Register form*)

Note: If the title starts with *GS_ it means that the label is coming from the Naming Conventions in the Global Settings. If the label is changed it will not be affected by future Global Setting changes and will only affect that Register

Edit Section	2				×
Section — Title @	Fill 😨 🔵	SectionName #997788	2 Text 👔 🤇	#FFFFFF	×
		8		4 Save	CANCEL

 To change the background colour and text colour of the section click on the respective Choose Background Colour

 or Choose Text Colour
 buttons and a colour picker will display. Select your colour. If you want the colours to be the same as another section, copy the respective Colour code e.g. #997788 from one section to the other

Note: If you want Black text enter the colour code **#000000.** Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support - support@riskman.net.au

4. Press Save when complete

/ Dates	
Admission Date	Dont Display
la Incident Date	Entry Required
Notification Date	Dont Display 🔽
Date Closed	Dont Display 🗸

Example: "Dates" section after changing the text and background colours

How can I view a summary listing of all the users in RiskMan?

The **"User Registry"** page provides you with a summary list of all registered users in your RiskMan. Depending on any Entry/Update restrictions you have in your User Profile, you will only be able to view users that match your restrictions

To access the User Registry page either

 Click on the User Registry button at the top of any of the User Profiles pages or select Administration -> User Permissions -> User Registry from the menu

Genera	I Incident Quality Act	tivity Risk Feedback	
		User Profiles (General)	
Select User:	Hayden, Anne (shayden) 1148 Users found. Only displaying first 500 users 😿	User Registry Save User	New User Delete User
User Name	Filter	Rebuild 'Selec	t User' List Now
RiskMan Us	er Type Filter:	Only Show Expired Users:	
	n Filter	 Only Show Deleted Users: 	
User Positio			
	ed After Date:	Include Deleted/Expired Users in Search:	

The list of users you have permission to view (this could be all users or users matching your Entry/Update Restriction Details) will be listed. These users may be grouped by a column (depending on the last time you visited this page) or ungrouped

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Display Option Definitions

- Show Columns: Uncheck the columns that you do not want displayed in your list. Some columns will always display and therefore will not be an option to hide
- **Display:** Select the type of users that you wish to display in your list ie. Deleted Users, Expired Users, Active Users
- Expand: Click this button if you wish to view all the users in your list if the list is collapsed. Alternatively if you only wish to expand a specific group of users, click on the button next to the collapsed group of users
- Collapse: Click this button if you wish to collapse an expanded list of users that have been grouped.
 Alternatively if you only wish to collapse a specific group of users click on the button next to the expanded group of users
- To export your list to Excel™ click on the Export button

<u>User List</u>

The following is a list of options available in the User List

• Username link: If you click on the <u>username</u> it will direct you to the User profiles page. This is useful if you wish to make an alteration to a specific user profile e.g. correct an email address, delete (from the General tab) the user as they are no longer employed, change the user's template in one or more Registers

To then return to your **User Registry** page, click on the **User Registry** button at the top of any of the User Profile tabbed sections

Email Address Link: If you wish to send an email to a
particular user, click on the user's respective <u>email</u>
<u>address</u> link. An email will open with the email address
auto-populated ready for you to send an email

Suggested Groupings for your User Profile List

The list of users can be grouped by any of the column headings – *refer to examples below*

 Templates – Indicates the General or Register specific Template a user is assigned to.

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Example: Users grouped by their assigned General Template

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Email Domain – Checks that users have entered the correct domain for their email address (the details after the "@" symbol e.g. @riskman.net.au) and highlights to you if users have entered an email address outside your organisations domain e.g. @hotmail.com or entered an incorrect domain for your organisation

Premail Domain				
	🙎 User Name			
		Ŷ		
	Medibank			
	RiskMan User			
	Line Manager			
	Manager			
-	domain: @cpl,com.au			
	Ihaupt			
-	domain: @riskman.net			
	lauraf			
-	domain: @riskman.net.au			
	Anne Hayden			
	Simon			
	chrissyn			
	Scott Esler			
	anneh			
	Lauren			
	default			
-	domain: @softwaredesign.com.au			
	Brett			
-	domain: @test.com			
	tuser			

3. **Display Name** – Checks to see if a user has more than one logon in RiskMan

	🔕 User Name	Employment Role			
		- Employment Role			
-	User Display Name: Anne Hayden				
	Anne Hayden				
	Trainer	Acting Charge Nurse			
-	User Display Name: Arti Nazareth				
	Trainee 8	Acting Charge Nurse			
•	User Display Name: Default User				
	default	Acting Charge Nurse			
•	User Display Name: Dhiraj D				
	Dhiraj	CEO			
=	User Display Name: Esler, Scott D.				
	Scott Esler				
-	User Display Name: Executive				
	Executive				
•	User Display Name: Faulkner, Laura				
	lauraf	Priest			
	User Display Name: Fernandez, Brett				
	Brett	Doctor - Consultant			

How do I assign staff to Managers?

Refer to the **RiskMan Manager/Staff Relationships Guide** accessible via the menu *Help -> Reference Guides*