## Introduction

This reference guide is aimed at any Manager who wishes to assign their RiskMan responsibilities e.g. reviewing Incidents and Feedback Notifications; reviewing Risks; reviewing Quality Activities; to another user or users, if they are away from their duties for an extended period of time e.g. annual leave

# What happens if I go on leave or cannot fulfil my RiskMan duties for a period of time?

If you are away from your normal working duties for a considerable period of time, you can delegate your RiskMan responsibilities to another RiskMan user or users from the menu option *My Workspace -> Assign a Delegate* 

#### To delegate your responsibility

#### 1. Press Add Delegate **1**

🎊 🥹 My Workspace	e   Management   Ad	dministration Reports Help	Log Out	USER: System	Manager (Manager)
		Manage Delegates			
Add Delegate					
Delegate's Username	Delegate's Name	Delegation start date	Delegation end date		
	There are	no items to show in this view			

- 2. Press the **Filter 2** icon
  - Use one of the Filter conditions e.g. Enter the user's surname in the User Name Filter field and press Filter List
- A list of users that match your filter conditions will be displayed in the **Delegate** <sup>(6)</sup> List. Select from the list
- Enter the start and end date <sup>(3)</sup> for the delegation period (End Date should be the date you are returning)
- 5. Press Save S
- 6. Repeat the above steps if you wish to delegate to more than one user for the same or a different date period

		Manage Delegates	
Add Delegate			
- ,	a staff member as your Dele	iate	
Delegate	Brett Fernandez (Brett)	- 8 2	
Start Date 👩	Wednesday, 13 October 2010	~	
End Date	Monday, 1 November 2010	Save 5	
chu Date			

### The delegated users <sup>(3)</sup> will be sent an email advising them of the delegation



## To modify/delete your assigned delegates

- 1. Click on the Delegate's Name **0** in the list
- If modifying, change as required and press Update 2

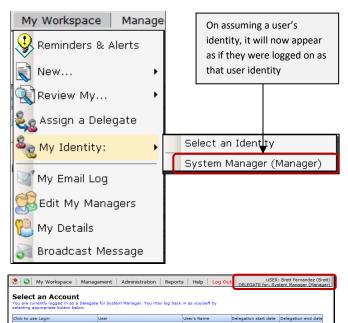
#### 3. If deleting, press Delete 6

📚 💿 My Workspac	e Management Admir	nistration Reports Help	Log Out	USER: System Manager (Manager)			
Manage Delegates							
Add Delegate							
Delegate Added A notifica	tion Email has been sent.						
	tion Email has been sent. Delegate's Name	Delegation start date	Delegation end date				

🕼 🔍 my	Workspace	Management A	dministra	ation Reports He	lp Log Out	USER: System I	Manager (Mar
			Mar	nage Delegates	5		
Add Delegate							
Edit or sele	t a staff me	mber as your Dele	gate				
Delegate	Brett Ferna	indez (Brett)	-		-		
Start Date			Update Delete		8		
End Date					Delete		
Delegate Addec	A notification	Email has been sent.					
Delegate's User	name	Delegate's Name		Delegation start date	Delegation end da	te	
Brett		Brett Fernandez		13 Oct 2010	1 Nov 2010		

# How does the delegated user look after my <u>RiskMan workload?</u>

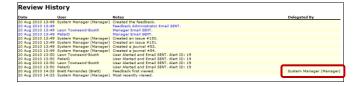
The user would log onto RiskMan using their own logon & password, select *My Workplace -> My Identity* and select your user name from the **Select an Identify** list



During the delegation period the user will be cc'ed on all email notifications you receive from RiskMan e.g. Alerts, Journal Alerts, Distribution Lists.

Whilst the user is using RiskMan under your identity, any activity that they engage in with an Incident, Feedback, Risk or Quality Activity, will be noted on the Review History in a separate column – **Delegated By** (as per example below). In this way it will be clear who was working with that notification at that time

# **CRLDatix** RISKMAN REFERENCE GUIDE TO DELEGATING YOUR RESPONSIBILITIES



The user can re-assume their identity by selecting their username from the *Workplace -> My Identity* menu option