

- Working with Lists -

FOR RISKMAN VERSION 2010

Last reviewed November 2020

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INTRODUCTION

Every record list that you have permission to view in RiskMan can be configured to suit your requirements. Further to this, each record list can be configured *individually*, meaning that for example if you can see the

- Entered Incidents page,
- Incident Inbox page, and
- Posted Incidents page

...you can set each one up with its own unique configuration.

You are able to:

- Change the columns being displayed, their widths, and the order in which they appear
- Change the number of rows shown per page
- Change the way the list is sorted, grouped, and filtered
- Save the way you've configured the page as a "View", and switch between your personally configured views
- Export the resulting list to a Microsoft Excel file if you wish

This guide also explains list functionality which is based on user permissions, so you might not have permission to some of these functions (it depends on your level of access). These include:

- Ability to generate a "Letter", based on an existing record in a register
- Ability to clone or update a record
- Ability to reassign ownership of a record

Note

This information in this guide applies to any register, however we have used an Incident register in the screenshots as it is the most universal register.

LIST BASICS


Here's an explanation of the common functions on your lists:















The screenshot shows the Riskman 'INBOX - Incidents for Review' interface. It features a navigation menu at the top, a toolbar with icons for search, refresh, and other actions, and a main table of incident records. The table has columns for Dist, ID, Group, Incident Date, Incident Involved, Facility, Location, Outcome, and Summary. Red boxes and numbers 1-6 highlight specific UI elements: 1 points to the column headers, 2 to the column selection dropdowns, 3 to the pagination info (54 Records Found), 4 to the items per page and navigation controls, 5 to the record selection toolbar, and 6 to the overall system toolbar.

Dist	ID	Group	Incident Date	Incident Involved	Facility	Location	Outcome	Summary
None	3389		1 Jun 2012	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fell in shower
None	3474	3480	3 Feb 2012	Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
None	3480	Master	13 Jun 2012	Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt delivered incorrect dosage instructions on medication..
None	3481	Master	23 Jun 2012	Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Client became aggressive during meal time...
None	3493		29 Jan 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt administered extra dose of heparin... not happy!
None	3497		25 Feb 2012	Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SPECIMEN LOST AFTER COLLECTION
None	3536	3531	25 Jul 2012	Volunteer	Acacia Private	Centre Block 1st Floor	ISR 4 MINOR	Pt administered extra dose of panadol
None	3537		5 Aug 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 2 HIGH	Client became aggressive during theatre transfer... because staff...
None	3545		15 Sep 2012	Client	Acacia Private	Centre Block 7th Floor	ISR 3 MEDIUM	Pressure wound degrading to Grade 2 status
1	3572		3 Feb 2011	Client	Acacia Private	Centre Block 7th Floor	ISR 2 HIGH	ABO Blood Incompatibly during transfusion
None	3573		1 Feb 2011	Relative/Visitor	Acacia Private	Emergency Department	ISR 5 NEAR MISS	Visitor entered ED in an intoxicated state and abused staff
None	3574		3 Feb 2012	Staff Member	Acacia Private	Cardiac Rehab	ISR 4 MINOR	Staff member hurt back lifting patient from bed to chair
None	3581		31 Mar 2011	Client	Acacia Private	East Block 1st Floor	ISR 4 MINOR	Pt fell in shower...
None	3582		1 Apr 2011	Client	Acacia Private	Patients Home	ISR 4 MINOR	Client became aggressive during home visit
None	3583	3576	23 Feb 2011	Client	Acacia Private	GICU	ISR 4 MINOR	Client became aggressive in reception - assaulted staff member

- 1 You cannot modify these columns; they will always be displayed as-is.
- 2 Columns that you can change: Column order, widths, show/hide, etc
- 3 Pagination info: Total records and page count
- 4 Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page
- 5 Toolbar: When you select a record, the available functions/options for working with that record appear here
- 6 Toolbar: Options for configuring and working with your list overall

The fixed columns: Explanation

- ❶ “Administrative” status of the record. Click the  icon for more information.
- ❷ Your personal viewing status of the record. **Green:** You’ve never opened it. **Grey:** You have opened it. **Red:** Since you last opened it, someone else has modified it. Also, click the icon to open the Review History of the record.
- ❸ The paperclip tells you there is at least 1 document attached to the record
- ❹ Dist is short for Distribution List. Usually it will say None. In this example, there is a number – 1 – in one of the rows. This represents the number of users who have been put on the Distribution List for that record *who have not yet viewed it*. This column is also a shortcut – click it to distribute the record to other users.
- ❺ Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.
- ❻ ID number: Click on the record’s ID number to open it. Note that you do not need to check the record’s selection box before clicking the ID number!

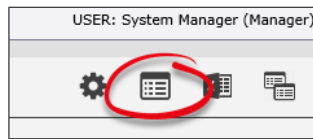
❶	❷	❸	❹	❺	❻
			Dist	<input type="checkbox"/>	ID ▲
					<input type="text"/> 
			None	<input type="checkbox"/>	3389
			None	<input type="checkbox"/>	3474
			None	<input type="checkbox"/>	3480
			1	<input type="checkbox"/>	3481
			None	<input type="checkbox"/>	3493

MODIFYING YOUR LIST

Changing the columns shown on your page

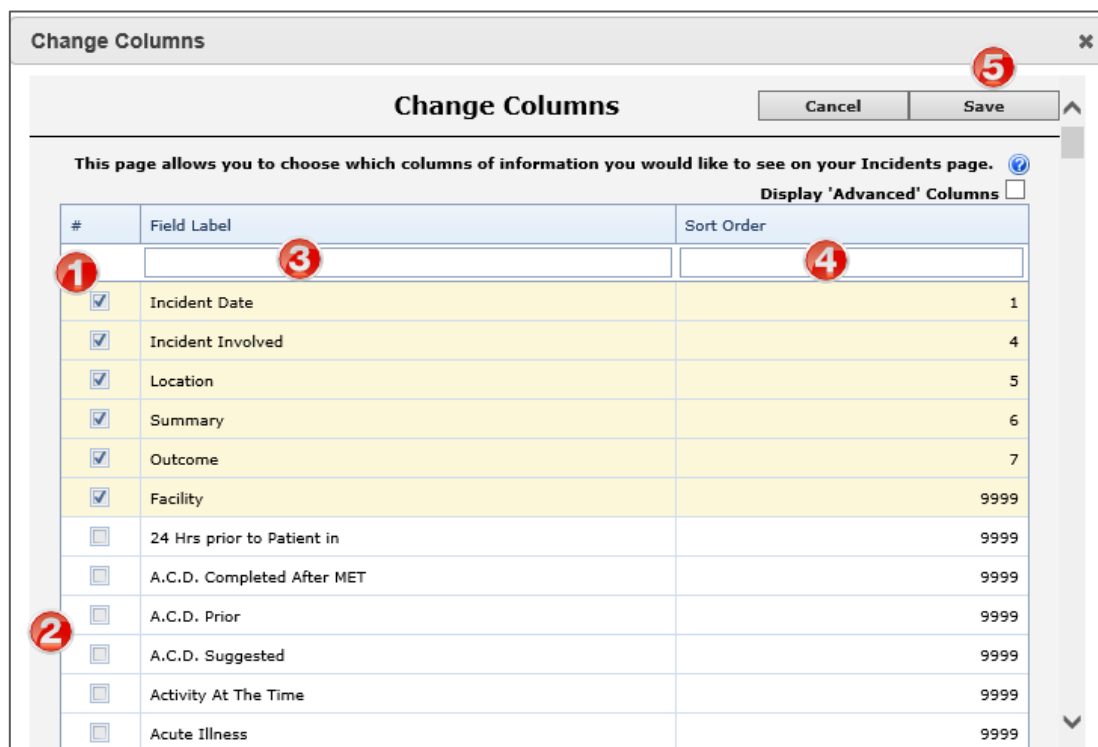
Essentials

Click the **Change Columns** icon in the



toolbar.

The Change Columns dialog is shown. Highlighted at the top of the list are the columns currently being displayed on your list:



- 1 Uncheck to remove column
- 2 Scroll through the list of fields and check each one you want to display as a column on your list
- 3 Can't find what you're after? Start typing a field name here to search the list
- 4 Set the default order of your columns. This is useful when ever you clear a view in your list, it will assume the order you have set. Any numbers in the Sort Order column that are the same will appear in alphabetical order. In this example 9999 is set to alphabetical order
- 5 Click the **Save** button once you're done. Your list will refresh, and the columns you selected will be displayed.

Extras

#	Field Label
<input checked="" type="checkbox"/>	Incident Date
<input checked="" type="checkbox"/>	Incident Affected
<input checked="" type="checkbox"/>	Location

You can edit the **Field Label** if you like. You might do this to abbreviate a long field name. Your changes are only visible on this list, and they will not affect any other part of the system.

#	Field Label	Sort Order	Field Name	Field Type
<input checked="" type="checkbox"/>	Incident Date	1	IncidentDate	Incident
<input checked="" type="checkbox"/>	Incident Involved	4	IncidentInvolved	Incident
<input checked="" type="checkbox"/>	Location	5	Incident_Location	Incident
<input checked="" type="checkbox"/>	Summary	6	Description	Incident
<input checked="" type="checkbox"/>	Outcome	7	Outcome	Incident
<input checked="" type="checkbox"/>	Facility	9999	Site	Incident

Check the **Display 'Advanced' Columns** box to show additional information for each field. You might need to use this option to differentiate between several fields from your register that have the same label; in which case, you could determine which is which by referring to the **Field Name** column, which contains the unique name of that field in the database.

Change the order of your columns

Simply click and drag a column header to a new spot to rearrange your columns. When you see the two white arrows, you can release your mouse button. The system remembers your changes as you go.

1

Incident Involved	Facility	Location	Outcome	Su
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fe
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

2

Incident Involved	Facility	Location	Outcome	Su
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fe
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

3

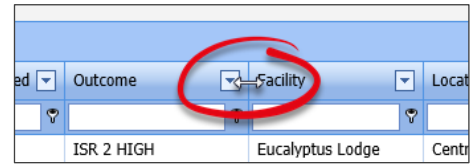
Incident Inv.	Outcome	Facility	Location	Outcome	Su
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fe
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

4


Incident Involved	Outcome	Facility	Location	Su
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	Fe
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	SP

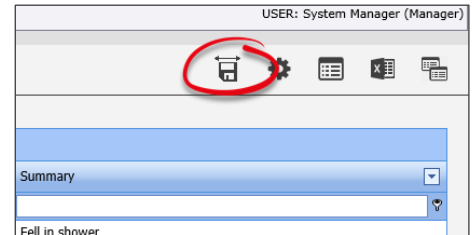
Adjust the widths of your columns

Once you have your columns in their desired order, you can adjust their widths to make the best use of the space available on your screen. We recommend adjusting them from left to right.



Put your mouse cursor on the line that separates each column. Click and drag left to right to adjust as needed.

Once you have adjusted all the column widths as desired, click the save icon  in the toolbar to save your changes.



Note that the save icon only appears in the toolbar *after* you've started adjusting the width of your first column.

Sort your list

Click on a column heading to sort your records by values in that column.

The arrow represents whether you are sorting in ascending or descending order.

The column you sort by will always be remembered on this list.

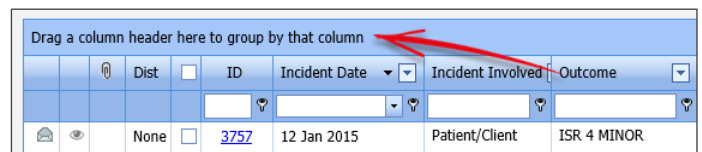
ID	Incident Date	Incident Involved
3757	12 Jan 2015	Patient/Client
3752	9 Dec 2014	Patient/Client
3742	28 Nov 2014	Patient/Client
3735	28 Nov 2014	Patient/Client

Group the records on your list

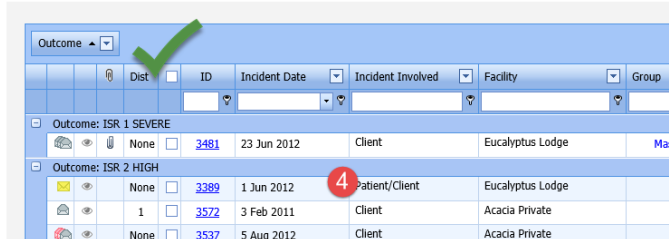
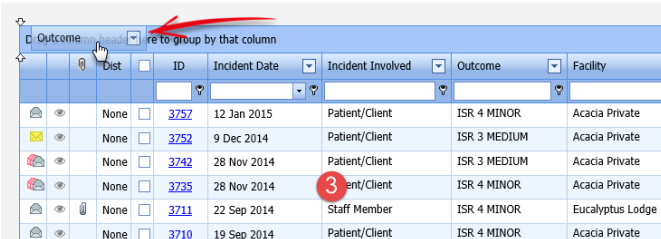
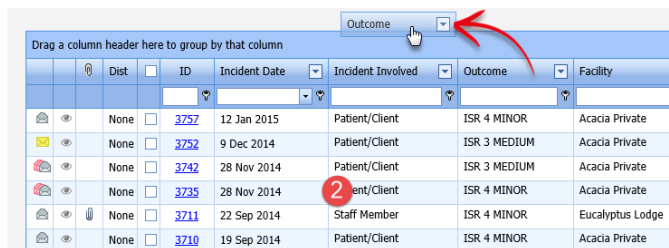
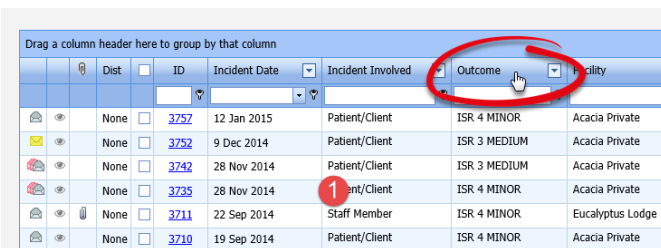
Group the records based on one of the columns showing in your list. In this example we've grouped our incidents by their severity rating:

INBOX - Incidents for Review									
New Incidents and edits of Incidents									
Outcome ▾									
	Dist	ID	Incident Date	Incident Involved	Facility	Group	Location	Summary	
Outcome: ISR 1 SEVERE									
	None	3481	23 Jun 2012	Client	Eucalyptus Lodge	Master	Community Health Centre	Client became aggressive during n	
Outcome: ISR 2 HIGH									
	None	3537	5 Aug 2012	Client	Acacia Private		Centre Block 4th Floor	Client became aggressive during t	
	None	3667	1 Aug 2012	Patient/Client	Acacia Private		Centre Block 2nd Floor	Pt fell from bed and fractured fem	
	None	3389	1 Jun 2012	Patient/Client	Eucalyptus Lodge		Centre Block 7th Floor	Fell in shower	
	1	3572	3 Feb 2011	Client	Acacia Private		Centre Block 7th Floor	ABO Blood Incompatibly during tra	
Outcome: ISR 3 MEDIUM									
	None	3752	9 Dec 2014	Patient/Client	Acacia Private		ACAS	Gonna make a few changes	
	None	3742	28 Nov 2014	Patient/Client	Acacia Private	Master	Cafeteria	Stained a red dress	
	None	3704	12 Mar 2013	Patient/Client	Acacia Private		Centre Block 5th Floor	Resident fall in home on lino floor	
	None	3545	15 Sep 2012	Client	Acacia Private		Centre Block 7th Floor	Pressure wound degrading to Gra	
	None	3497	25 Feb 2012	Client	Acacia Private		Day procedure unit	SPECIMEN LOST AFTER COLLECT	

In order to group your records, click and drag the column header to the space above the list which says **Drag a column header here to group by that column:**



Click and drag a column header to the grouping area. When you see the two white arrows, you can release your mouse button. The system remembers the groupings you have added.



You can add subsequent grouping levels by following the same steps.

To **remove** a level of grouping, simply click and drag the column header back to where you want it to be in the list.

Filter your list

You can apply a filter to one or more of the columns showing on your list, so that you only see a specific subset of the records in your list. Each column header has a filter box underneath it:

Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
None	3389		1 Jun 2012	Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	Fell in shower
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
None	3480	Master	13 Jun 2012	Intervention	ISR 4 MINOR	Acacia Private	Dayton	Pt delivered incorrect dosage instructions on medication...
None	3481	Master	23 Jun 2012	Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Ce...	Client became aggressive during meal time...
None	3493		29 Jan 2012	Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	Pt administered extra dose of heparin... not happy!
None	3497		25 Feb 2012	Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	SPECIMEN LOST AFTER COLLECTION

Click the funnel icon to select the type of filter test you want to apply:

Incident Involved	Outcome	Fac
Patient/Client	<input checked="" type="checkbox"/> Begins with	Euc
Staff Member	Contains	Euc
Intervention	Doesn't contain	Aca
Client	Ends with	Euc
Client	Equals	Aca
Client	Doesn't equal	Aca
Client	Like ('%', '_')	Aca
Volunteer		Aca

Incident Date	Incident Involved	Outcome
1 Jun 2012	<input checked="" type="checkbox"/> Equals	HIG
3 Feb 2012	Doesn't equal	MIN
13 Jun 2012	Is less than	MIN
23 Jun 2012	Is less than or equal to	SEV
29 Jan 2012	Is greater than	MEE
25 Feb 2012	Is greater than or equal to	MEE


Text: Filter tests that can be used against data fields

Numbers: Filter tests that can be used against date / time / numeric fields

Note: When filtering your list that is a multi-select field, you must use the "contains" filter and not "equal". The reason for this is the way the values are stored behind the scenes and for technical reasons that you won't be able to see

Type the desired value and press Enter on your keyboard. Your list will then only display matching records:

Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardiac Rehab	Staff member hurt back lifting patient from bed to chair
None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main Entrance	I was assaulted by a patient outside main entrance when I was coming t...
None	3591		19 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 2nd Floor	Assault by client in reception
1	3631	Master	3 Feb 2012	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 3rd Floor	Became aggressive towards a staff member
1	3697	3696	7 Jan 2013	Staff Member	ISR 4 MINOR	Acacia Private	Ward 1F	Fell over
None	3711		22 Sep 2014	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Applicances	stuff stuff stuff

To remove a filter, click into the filter box, delete your filter criteria, and press the Enter key on your keyboard. To remove all filters at once, click the **Clear Filter** icon  in the toolbar:

Select a record to display the available tools.

INBOX - Incidents for Review
New Incidents and edits of Incidents

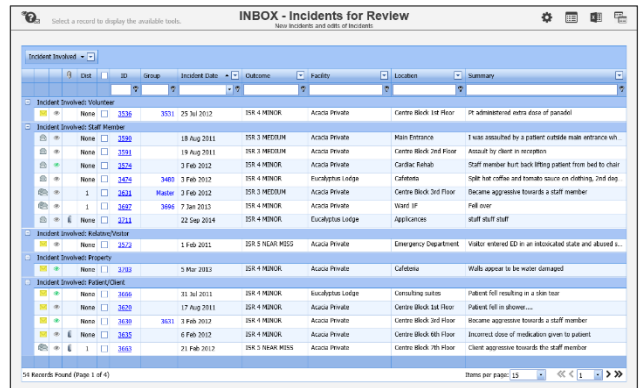
Drag a column header here to group by that column


Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Locati
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafete
None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardia
None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main E

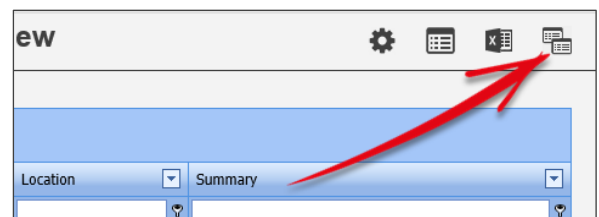
Save the way you have configured your list as a “View”



Once you have setup the columns you want, and applied sorting, filtering, or grouping to your list, you can then save that configuration as what is called a **View**. You can have multiple saved views that you can switch between with the click of your mouse.

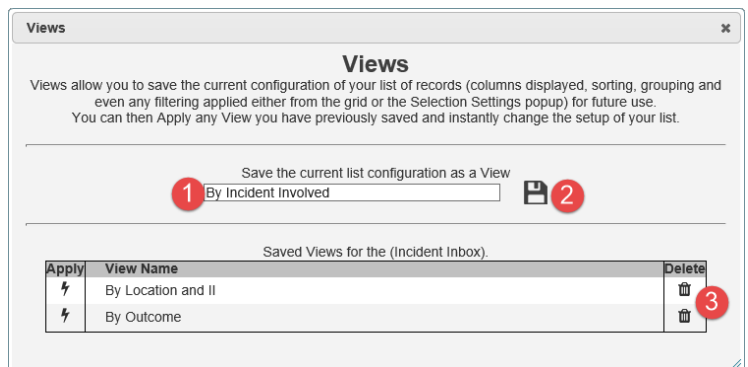
In this example, we’ve grouped our records by the Incident Involved field, and we have sorted the records by incident date.





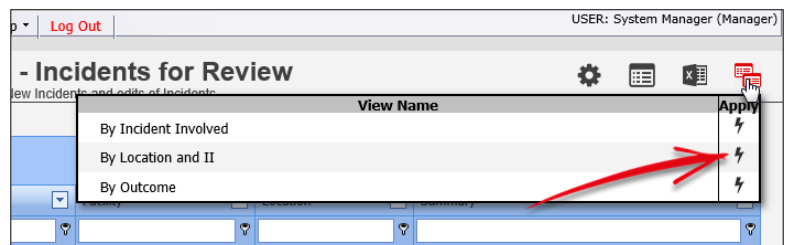
In order to save this as a view, we need to click the **View** icon  in the toolbar.



- 1 Type a name for your View.
- 2 Click the **Save** icon . You will be returned to the list, and a message will be displayed to confirm your view was saved.
- 3 You can delete any of your existing views by clicking the respective **Delete** icon .



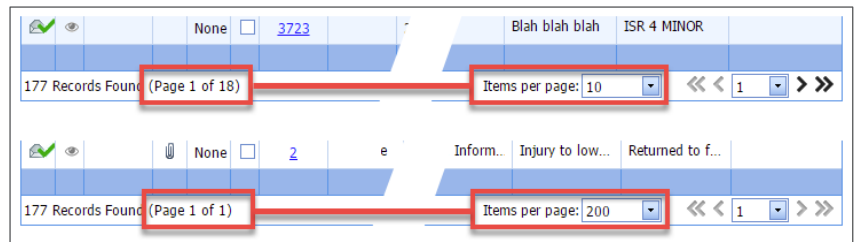
You can now switch between your saved Views by hovering your mouse (do not click) over the **Views** icon , and clicking the **Apply** icon  of the View you wish to load.



Export the list to Excel

You can export the records shown on the current list by clicking the Excel icon  in the toolbar.

Only the first page is exported, so if your list contains more records than can be displayed on one page because of your pagination settings, simply increase the number of items per page so that they fit on to one page.



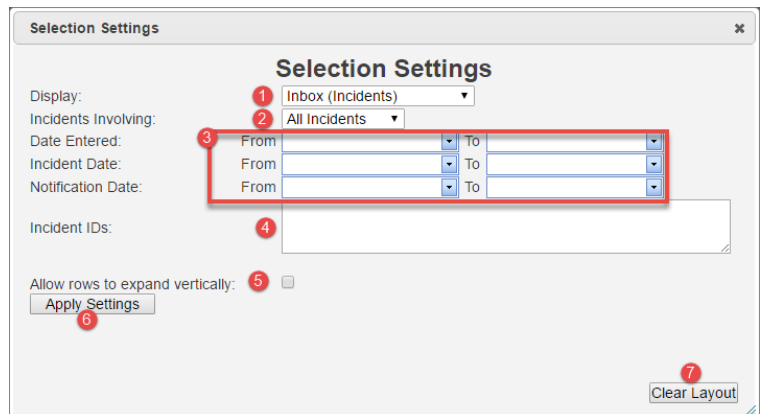
Note

The Export to Excel function may not be available as it is permissioned by your Administrator.

Selection Settings

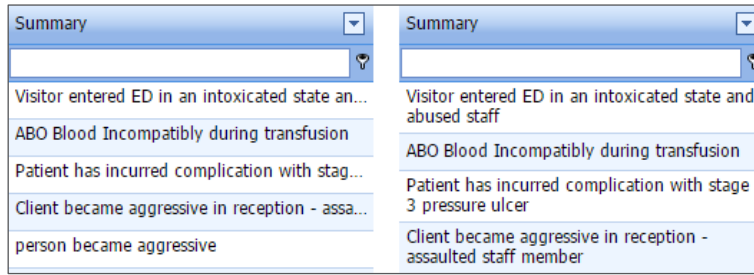
In the toolbar, you'll note the Selection Settings cog icon . It contains the following functionality:

- 1 Switch between the various record lists that you have permission to view
- 2 Restrict the records being shown on your page by record type; in this example by Incident Involved
- 3 Restrict the records being shown on your page using date filters (the date fields available will vary by register)



- 4 Restrict the records being shown on your page by specific record ID numbers. Separate multiple ID numbers using a comma, e.g. 51,73,106 etc
- 5 You set the width of the columns you have chosen to display on your list. By default, if any individual cell contains more information than can be shown, the information will be truncated, and an ellipsis displayed instead.

Enabling this setting will force the content to be displayed; information in the fields will wrap instead of being truncated.



Left: Setting turned off Right: Setting turned on

6 Once you have configured the various settings, click the **Apply Settings** button. Your list will refresh with your desired settings in place. The settings you apply here will be remembered until you decide to change them.

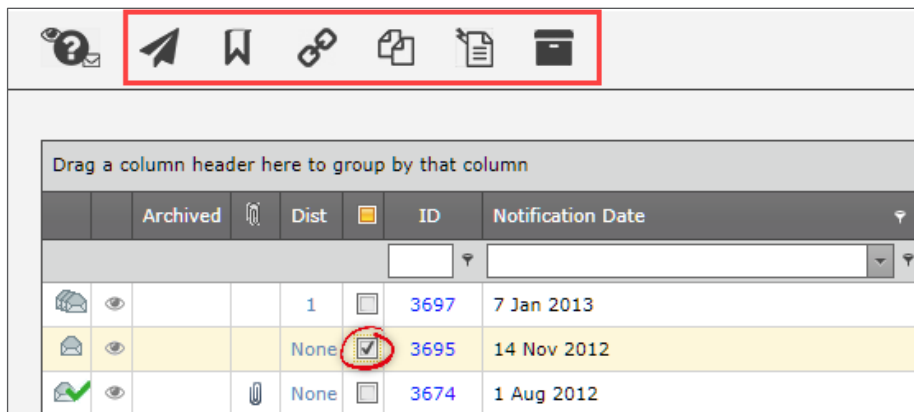
7 Should you wish to return your list back to a “default” configuration, click the **Clear Layout** button. This returns your list to the default settings, including columns displayed, removing all sorting, filtering, and grouping, and clears all of the settings applied in the Selection Settings dialog. Note that any **Views** you have created will not be affected by this action.

MODIFYING THE RECORDS SHOWN ON YOUR LIST

Functions/Option Toolbar

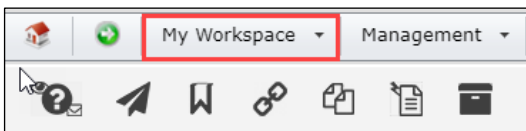
When a record is selected from a list by clicking on the check box in the Selection column a Function/Option toolbar of icons will appear.

The Functions/Options icons are shown on the top left of the screen, underneath the menu buttons.

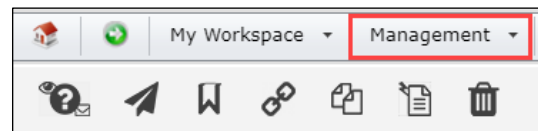


Depending upon the Register you are viewing and your user permissions, the number of available icons you see displayed will vary:

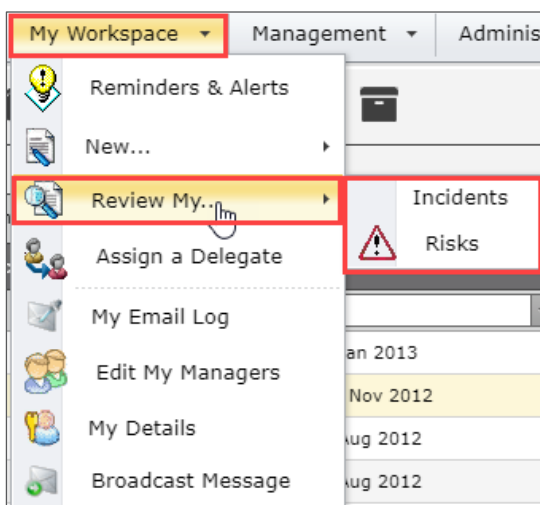
Icons available under “My Workspace” tab.



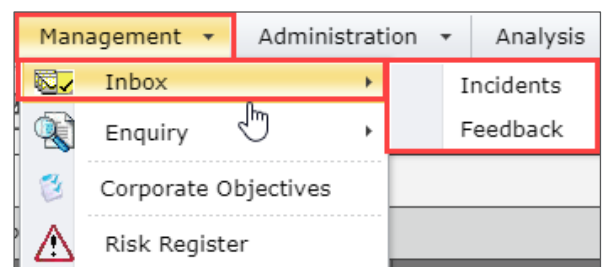
Icons available under the “Management” tab.



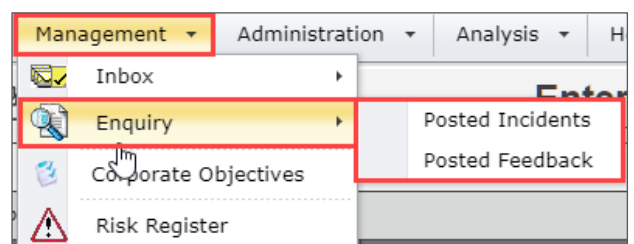
Review My > Incidents



Inbox > Incidents



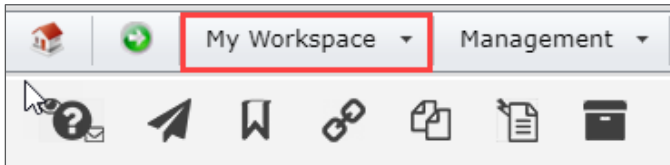
Enquiry > Posted Incidents



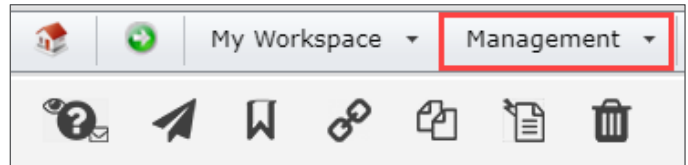
Selection state menu items

Below is a list of the Selection state menu items available in the My Workspace and Management lists.

My Workspace icons



Management icons



Icon Legend

This icon opens an info page that has descriptions of all the **Record Status** Icons displayed in the first column of the record lists.



Yellow closed envelope

A new item that has not yet been examined by an administrator.



Grey open envelope with a red x

A deleted item.



Grey open envelope

An item that has been viewed, but not posted yet.



Green eye

An item that you have never viewed.



Three Yellow closed envelopes

An edit of an item, not yet viewed by an administrator, not previously posted.



Red eye

An item you have previously viewed, but has since been updated. This may include Journal changes.



Three Grey open envelopes

An edit of an item, has been viewed by an administrator, not previously posted.



Grey eye

An item that has not changed since you last viewed it.



Two red and one grey open envelope

An edit of an item, has been viewed by an administrator, there is a posted version.



Two red and one yellow closed envelope

An edit of an item, has been viewed by an administrator, there is a posted version.



Grey open envelope with a green check mark

A posted item.



Distribution List

Allows you to distribute access of the selected record to other users.



Bookmark

Bookmarks the selected record. The bookmark will appear in your bookmark widget on your Homepage and in your Reminders & Alerts page.



Link Records

Allows you to link two or more records together because they are relevant to each other in some way.

Once you have selected a record, click this button to open the Linked Records dialog. From there you will be able to select records that you want to link together.



Clone & Link

Creates a new record based on an existing record. When submitted, those two records (the original and the clone) will be linked together.



Custom Functions

(Letter Builder or Bulk Assign Managers)

The Custom Functions allows you to access Letter Builder letters and/or the Bulk Assign Managers function.



Delete

Deletes the selected record/s. A record may also be restored, if necessary, and if you have permission to do so.

*Note: Archive is available only from the **Review My > Incidents** list*




Archive

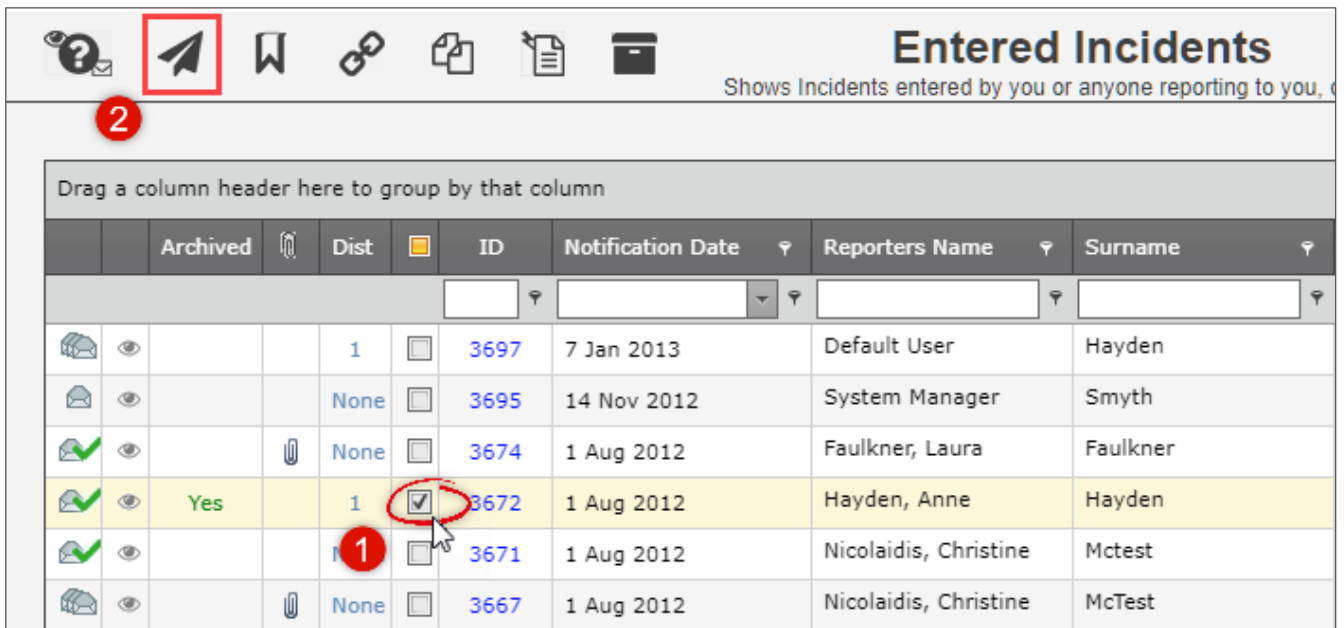
This allows the user to mark a record as “Archived” and hides it from their **Review My > Incidents** list.

Using the selection state menu items

Distribution List

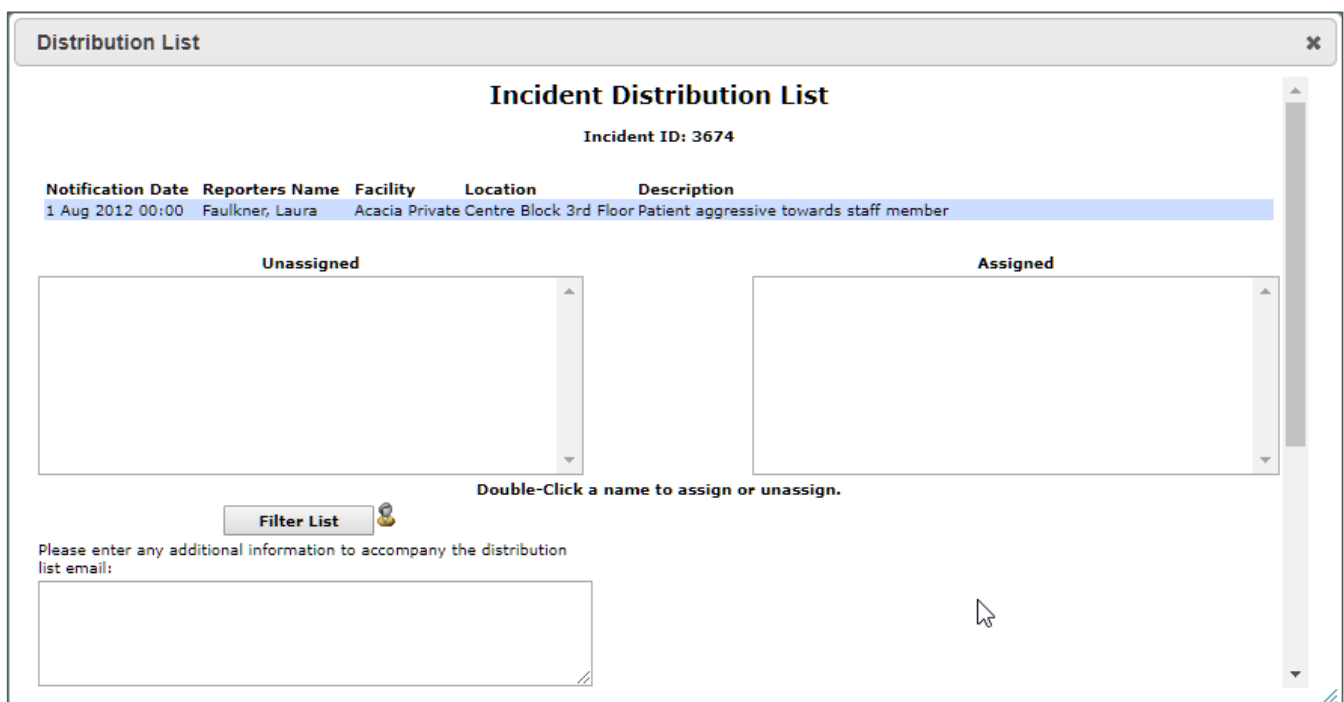
To add or remove users to or from a records Distribution List - do the following:

- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column
- 2 **Open the Distribution List dialogue** – Click on the Distribution List icon  in the Selection State Menu



Entered Incidents									
Shows Incidents entered by you or anyone reporting to you, e									
Drag a column header here to group by that column									
	Archived		Dist		ID	Notification Date	Reporters Name	Surname	
			1	<input type="checkbox"/>	3697	7 Jan 2013	Default User	Hayden	
			None	<input type="checkbox"/>	3695	14 Nov 2012	System Manager	Smyth	
			None	<input type="checkbox"/>	3674	1 Aug 2012	Faulkner, Laura	Faulkner	
	Yes		1	<input checked="" type="checkbox"/>	3672	1 Aug 2012	Hayden, Anne	Hayden	
			1	<input type="checkbox"/>	3671	1 Aug 2012	Nicolaidis, Christine	Mctest	
			None	<input type="checkbox"/>	3667	1 Aug 2012	Nicolaidis, Christine	McTest	

Incident Distribution List – From the Distribution List window you can assign Riskman users to the chosen Incident’s Distribution List.



Distribution List ✕

Incident Distribution List

Incident ID: 3674

Notification Date	Reporters Name	Facility	Location	Description
1 Aug 2012 00:00	Faulkner, Laura	Acacia Private Centre	Block 3rd Floor	Patient aggressive towards staff member

Unassigned

Assigned

Double-Click a name to assign or unassign.

Filter List

Please enter any additional information to accompany the distribution list email:

To assign a user to the Distribution List do the following:

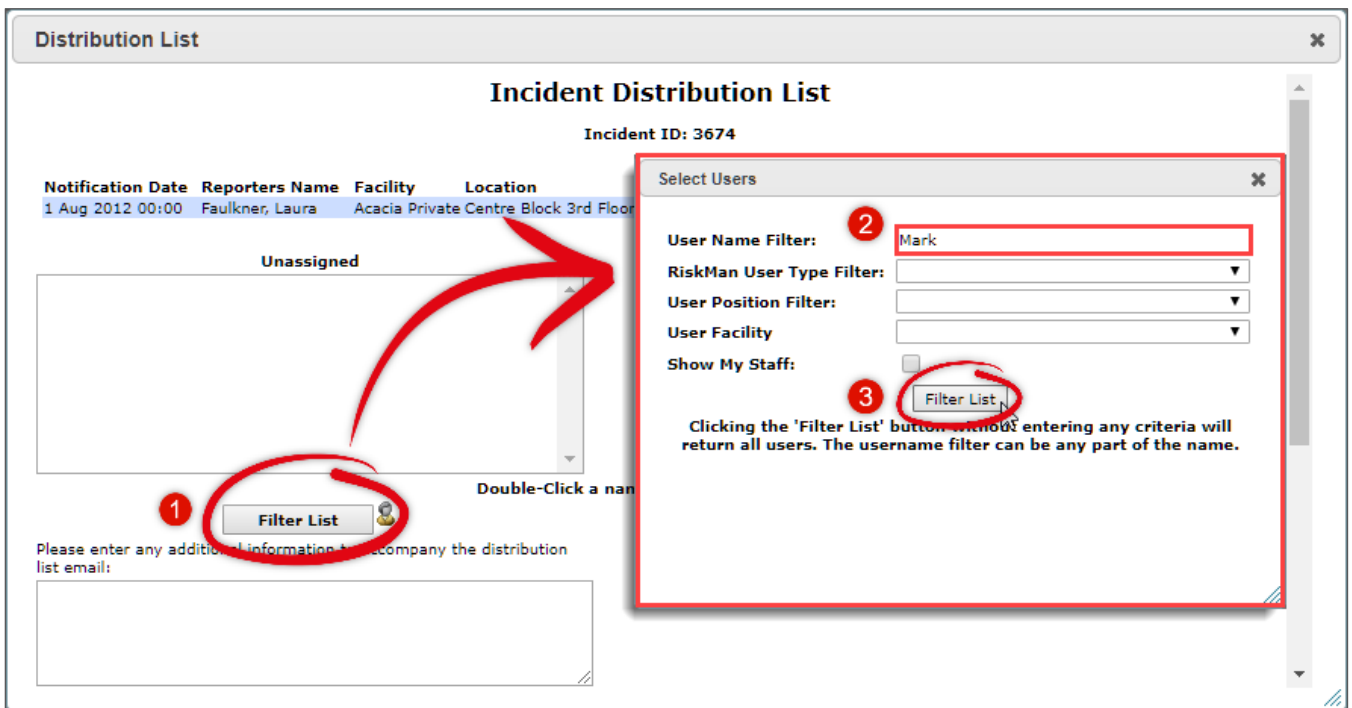
- 1 Click on the **Filter List** button in Distribution List window. This will open the **Select Users** window
- 2 Type the name of the user you wish to assign

Alternately you can use the drop-down lists to filter the users by:

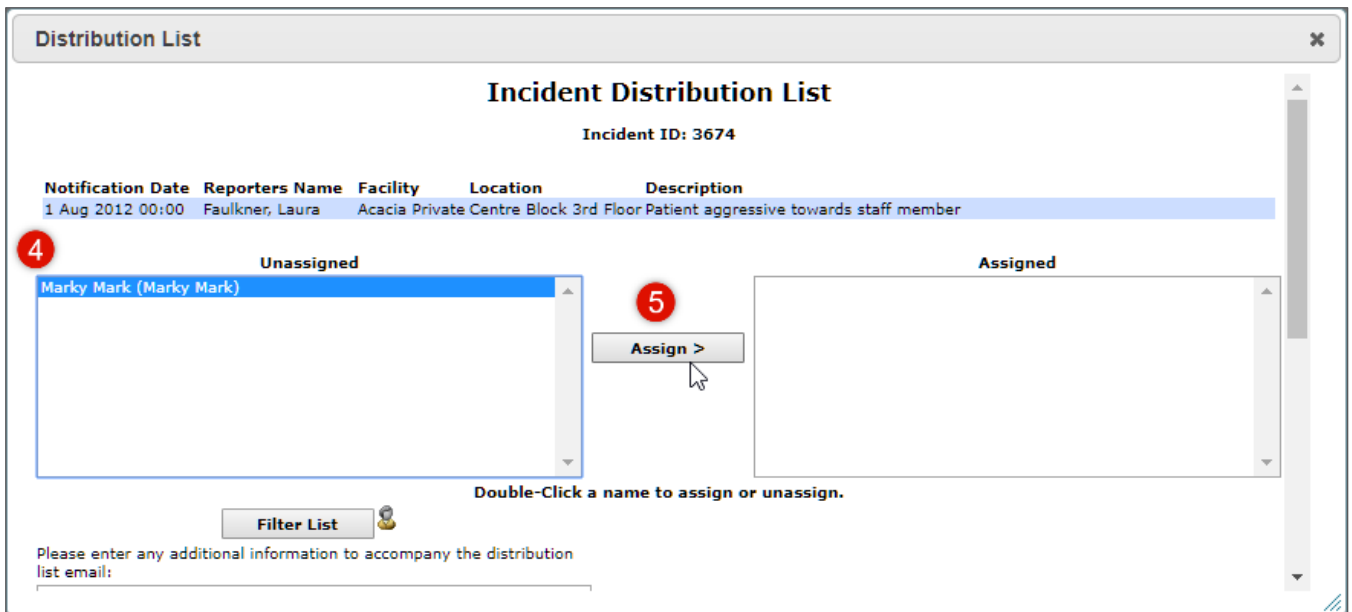
- Riskman User Type
- User Position
- User Facility

Note: The **Show My Staff** check box will filter a list of users that have been assigned to you in the Manager/Staff Module or your Organisation Structure register

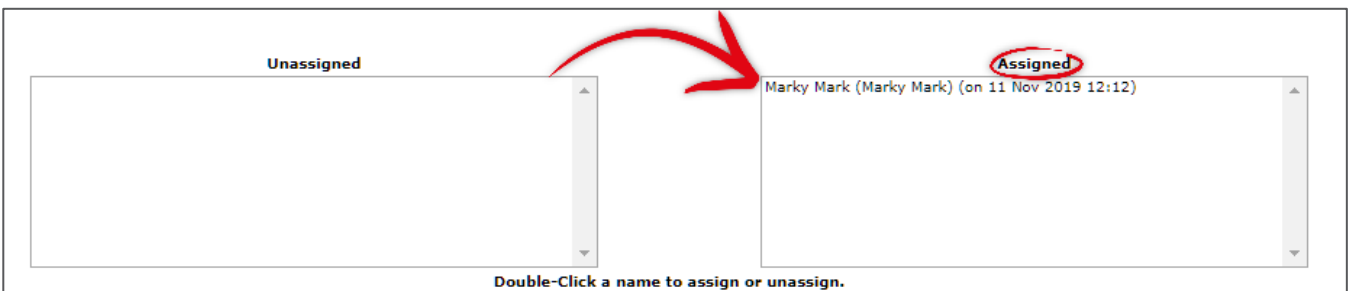
- 3 Click on the **Filter List** button on the **Select Users** window



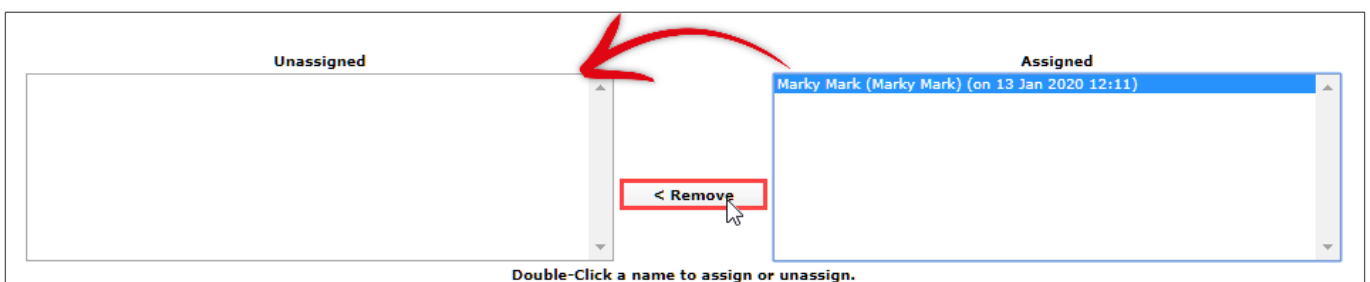
- 4 The name of the user will display in the **Unassigned** window on the left. Click on the name of the user you want to assign record access via the Distribution List
- 5 Click on the **Assign >** button.



The users name will move to the **Assigned window**



Once you have assigned a user to the Distribution List, you can manage the list by selecting the users and moving them from Unassigned list to the Assigned list and back.



Note: double-clicking on a name in a list will move it to the adjacent list.

Below is a diagram listing all the items found in the Distribution List dialogue.

- 1 Incident Record details**
Details of the Incident you are working on
- 2 Unassigned Users list**
A filtered list of users that are not yet assigned
- 3 Assign button**
Moves a user from the unassigned list to the assigned list
- 4 Remove button**
Moves a user from the assigned list to the unassigned list
- 5 Assigned Users list**
The list of all users assigned to the Distribution List
- 6 Filter List button**
Opens the Select Users search window
- 7 Email message text box**
Allows you to send a message to the assigned users
- 8 Send email & Close button**
Applies the Distribution List and sends email notification
- 9 Incident record Review History**
Gives you access to the Review History
- 10 Show More... button**
Expands the Review History window to display 10 entries.
- 11 Show All... button**
Expands the Review History window to show all entries

The screenshot shows the 'Incident Distribution List' dialog box for Incident ID: 3674. At the top, it displays the incident details (1). Below this is a table with columns for Notification Date, Reporters Name, Facility, Location, and Description (2). The main area is split into 'Unassigned' and 'Assigned' user lists (3, 5). Between these lists are 'Assign >' and '< Remove' buttons (4). A 'Filter List' button (6) is located below the lists. A text input field (7) is provided for additional email information. A 'Send Email & Close' button (8) is at the bottom of the distribution section. The 'Review History' section (9) contains a table with columns for Date, User, and Notes. At the bottom of the review history are 'Show More...' (10) and 'Show All...' (11) buttons.

Notification Date	Reporters Name	Facility	Location	Description
1 Aug 2012 00:00	Faulkner, Laura	Acacia Private Centre Block	3rd Floor Patient aggressive towards staff member	

Unassigned		Assigned	
Fernandez, Brett (Brett)	Hayden, Anne (anneh)	Marky Mark (Marky Mark) (on 5 Nov 2019 20:15)	Lauren Haupt (lhaupt) (on 5 Nov 2019 20:28)

Date	User	Notes
1 Aug 2012 12:17	Faulkner, Laura (lauraf)	Created the incident item.
1 Aug 2012 12:17		Risk Manager Email SENT.
1 Aug 2012 12:18	Esler, Scott D. (Scott Esler)	User Alerted and Email NOT SENT. Alert ID: 19
15 Aug 2012 11:17	Welsh, Simon (Simon)	Email SENT: Distribution List <Email>
15 Aug 2012 11:23	Welsh, Simon (Simon)	Incident first viewed after being assigned on Faulkner, Laura (lauraf)'s distribution list.



Bookmark

When you **Bookmark** a record, it will appear in the Bookmarked Records widget on the Homepage and in the Bookmarks tab in the Reminders & Alerts page (as pictured on the following page).

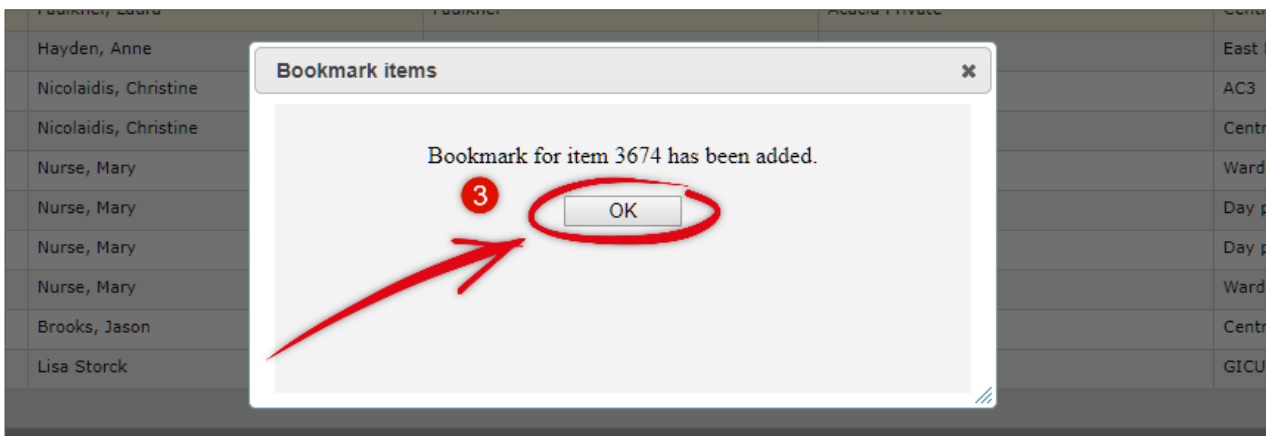
To Bookmark a record from any Register list, do the following:

- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column
- 2 **Bookmark the record** – Click on the Bookmark icon **W** in the Selection State Menu

Entered Incidents									
Shows Incidents entered by you or anyone reporting to you.									
Drag a column header here to group by that column									
	Archived	Dist	ID	Notification Date	Reporters Name	Surname			
		1	3697	7 Jan 2013	Default User	Hayden			
		None	3695	14 Nov 2012	System Manager	Smyth			
		None	3674	1 Aug 2012	Faulkner, Laura	Faulkner			
	Yes	1	3672	1 Aug 2012	Hayden, Anne	Hayden			
		1	3671	1 Aug 2012	Nicolaidis, Christine	Mctest			
		None	3667	1 Aug 2012	Nicolaidis, Christine	McTest			

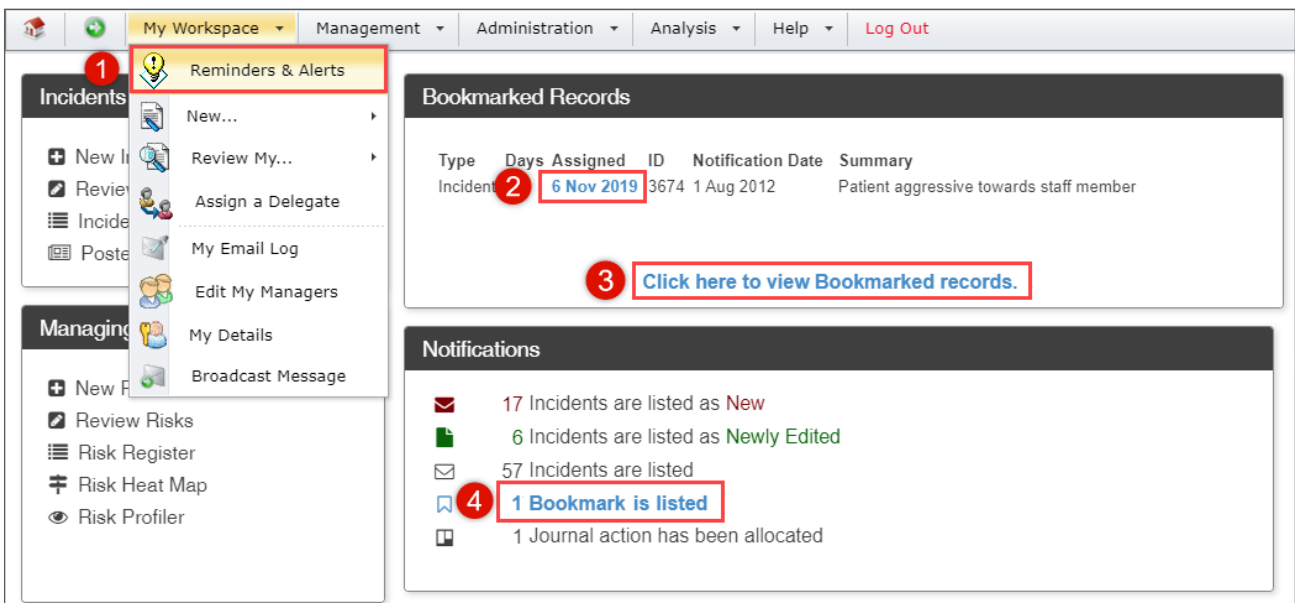
The Bookmark Items confirmation dialogue will be displayed.

- 3 **Bookmark items** – Click the **OK** button to confirm your choice



Accessing your Bookmarked items – From the **Homepage** there are four options allowing you to navigate to your Bookmarked items.

- 1 **Reminders & Alerts** - From the menu click on **My Workspace > Reminders & Alerts**
- 2 **Assigned Date (Direct link to the record)** From Bookmarked Records widget on the Homepage click on the Incident date. This will take you directly to the Incident record
- 3 **Bookmarked Records** - From Bookmarked Records widget on the Homepage click on the **Click here to view Bookmarked Records** link. This will open the Bookmarked Items page in Reminders & Alerts
- 4 **Notifications** - From Notifications widget on the Homepage click on the Bookmark link

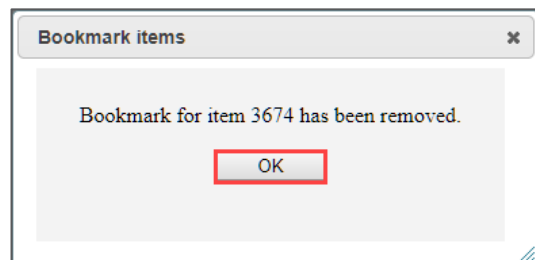
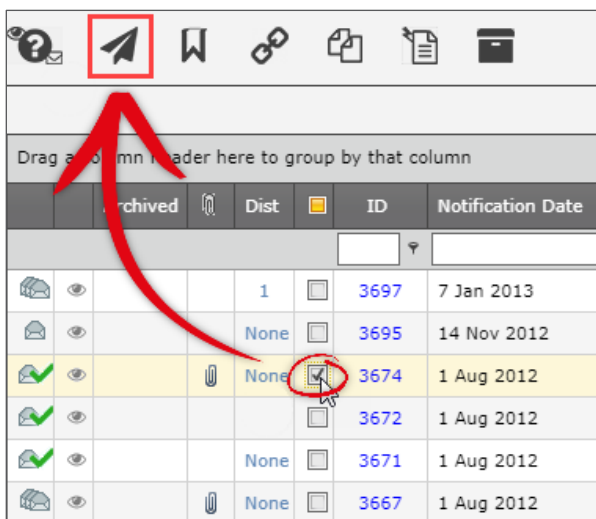


Removing a Bookmark – You can remove a Bookmark from a record by one of the two following methods.

Method 1

From a list select the record by clicking on the check box in the Selection State column.

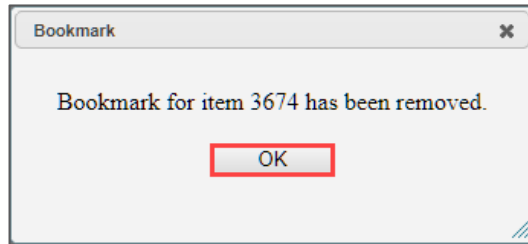
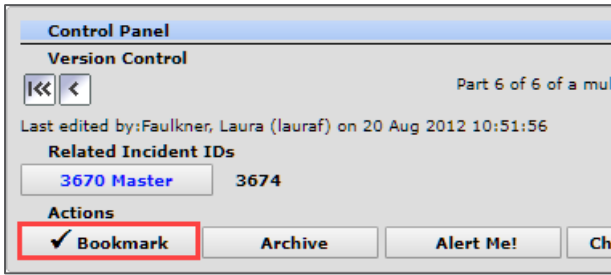
Click the Bookmark icon then click **OK** in the Bookmark Items dialogue window.



Method 2

Open the record and from the Control Panel click the **Bookmark** button


Click **OK** in the Bookmark Items dialogue window







Link Records

To Link two or more Incident records - do the following:

- 1 Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to link by clicking on the check box in the Selection State column
- 2 Open the Link Records dialogue** – Click on the Link Records icon  in the Selection State Menu

Archived	Dist	ID	Notification Date	Reporters Name	Surname
	1	3697	7 Jan 2013	Default User	Hayden
	None	3695	14 Nov 2012	System Manager	Smyth
	None	3674	1 Aug 2012	Faulkner, Laura	Faulkner
Yes	1	3672	1 Aug 2012	Hayden, Anne	Hayden
	None	3671	1 Aug 2012	Nicolaidis, Christine	Mctest
	None	3667	1 Aug 2012	Nicolaidis, Christine	McTest

- 3 Enter/Search** – Enter the Incident ID number that you want to link to the present record. Alternately, you can search for a record by clicking on the Search icon 
- 4 Link the records** – Click on the Add to Group icon . The Linking/De-linking Reason text field is for entering your reason for linking or de-linking the records. This field is optional

Note: The Linking /De-linking field must be enabled in Global Setting to have it appear in this window.

Link Records




Incident ID:

Linking/De-linking Reason:



Status	Exclude	ID	Surname	First Name
Master		3674	Faulkner	Laura
		3697	Hayden	Anne


Other functions available in the Link Records window.


Link Records


Incident ID:   


Linking/De-linking Reason:





Status	Exclude	ID	Surname	First Name
Master		3674	Faulkner	Laura
		3697	Hayden	Anne

1  **Promote**

2  **Exclude**

3  **Dissolve Group**


4  **Close**

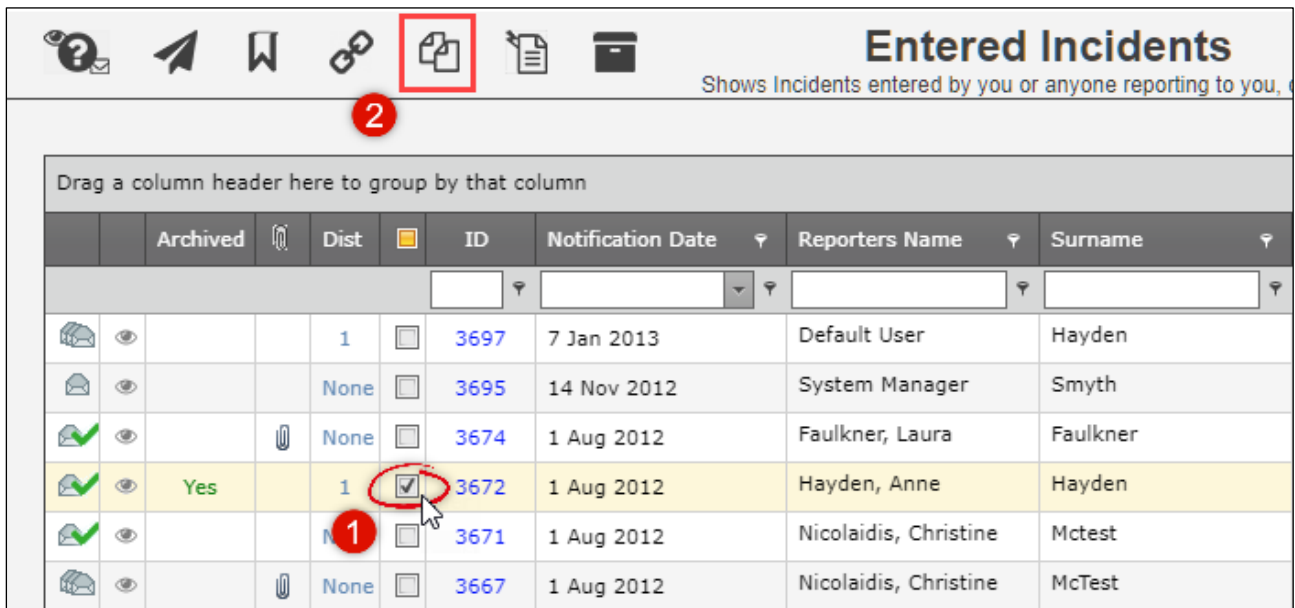
- 1

Promote This will move the record up the list of linked items. Moving a record to the top of the list will make that record the “Master” record in the group
- 2

Exclude This will remove the record from the group
- 3

Dissolve Group This will dissolve the group completely removing ALL links
- 4

Close This will close the Link Records window



Clone & Link

This will open a new Incident form based on an existing record and link it to the that record that it was cloned from.

- 1 Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to Clone & Link by clicking on the check box in the Selection State column
- 2 Create a Cloned record** – Click on the Clone & Link icon  in the Selection State Menu



Entered Incidents									
Shows Incidents entered by you or anyone reporting to you,									
Drag a column header here to group by that column									
Archived	Dist	ID	Notification Date	Reporters Name	Surname				
		3697	7 Jan 2013	Default User	Hayden				
	None	3695	14 Nov 2012	System Manager	Smyth				
	None	3674	1 Aug 2012	Faulkner, Laura	Faulkner				
Yes	1	3672	1 Aug 2012	Hayden, Anne	Hayden				
	1	3671	1 Aug 2012	Nicolaidis, Christine	Mctest				
	None	3667	1 Aug 2012	Nicolaidis, Christine	McTest				

Cloned records will be based on the original record; however, they will not copy any personal information. For example; a cloned record will not contain First Name, Surname, Date of Birth, or Address.

Cloned records will be linked to the original “Master” record. This link to the Master record can be removed as described in the previous Link Records section.




Custom Functions

This icon give you access to one of three Custom functions.

1. Letter Builder shortcuts
2. Health Legal Assign Managers or Risk Assign Managers
3. Bulk Update Records

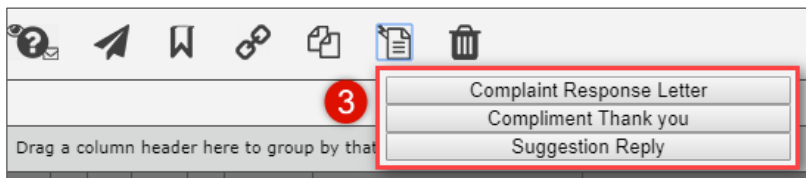
Access to these functions is dependent on the registers in your system and your level of permission.

The Custom Functions button is not a default function, it must be added to the menu before it is available.

- 1 **Letter Builder** - From any Register List (the Entered Incidents List is used in this example) select the record that you want to apply a Letter Builder letter to by clicking on the check box in the Selection State column
- 2 **Print the Letter** – Click on the Custom Functions icon  in the Selection State Menu

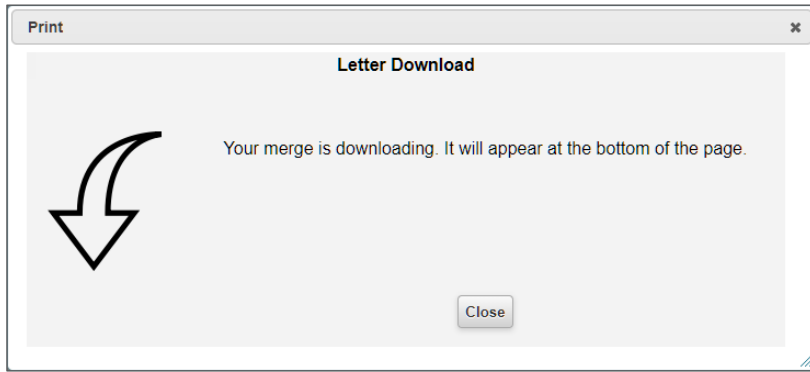
Drag a column header here to group by that column									
Archived	Dist	ID	Notification Date	Reporters Name	Surname				
	1	3697	7 Jan 2013	Default User	Hayden	<input type="checkbox"/>			
	None	3695	14 Nov 2012	System Manager	Smyth	<input type="checkbox"/>			
		3674	1 Aug 2012	Faulkner, Laura	Faulkner	<input type="checkbox"/>			
	Yes	3672	1 Aug 2012	Hayden, Anne	Hayden	<input checked="" type="checkbox"/>			
		3671	1 Aug 2012	Nicolaidis, Christine	Mctest	<input type="checkbox"/>			
		3667	1 Aug 2012	Nicolaidis, Christine	McTest	<input type="checkbox"/>			

- 3 Select the letter you want to print from the list



The data merge will start and the Print dialogue will open.

For more information regarding the Letter Builder see the Letter Builder reference guide.





Delete

Records are never truly deleted in Riskman. They are “marked as deleted” in the register database and no longer visible in the Inbox or the Posted Incidents lists. To “delete” a record do the following:

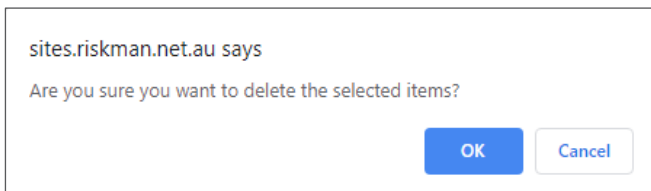
1 Select the record - From the Inbox or Enquiry Register List (the **Posted Incidents** List is used in this example) select the record that you want to Delete by clicking on the check box in the Selection State column

2 Delete the record – Click on the Delete icon  in the Selection State Menu

Posted Incidents											
Incidents accepted and reviewed, ready for reports.											
Drag a column header here to group by that column											
		Dist	ID	Incident Date	Reporters Name	Incident Involve	Facility	Location	Date Entered	Review Status	
		None	3848	25 Apr 2019	Default User	Patient/Client	Acacia Private	Adminstration	30 Apr 2019	Pending	
		1	3824	11 Jan 2019	System Mana...	Patient/Client	Eucalyptus L...	Adminstration	24 Apr 2019	Pending	
		1	3845	23 Apr 2019	Trainee 1	Patient/Client	Cabell Huntin...	Carpark (visit...	23 Apr 2019	Pending	
			3811	7 Jan 2019	System Mana...	Patient/Client	Wattle Private	Adminstration	22 Feb 2019	Pending	

A confirmation window will be displayed **Are you sure you want to delete the selected items?**

Click the **OK** button. The record will be marked as deleted and no longer visible.



Undelete a Record

Once a record has been deleted from a list under the Management menu you will no longer see the record in the **Inbox** or the **Posted Incidents** lists.

- 1 To undelete a record, go to the **INBOX - Incidents for Review** or the **Posted Incidents** list
- 2 **Open Selection Settings** – Click on the cog  icon to open the Selection Settings window

Posted Incidents						
Incidents accepted and reviewed, ready for reports.						
Incident Involve	Facility	Location	Date Entered	Review Status	Severity	Surname
Patient/Client	Acacia Private	Adminstration	30 Apr 2019	Pending	ISR 3 MEDIUM	Ragnarok
Patient/Client	Eucalyptus L...	Adminstration	24 Apr 2019	Pending	ISR 4 MINOR	Spatt
Patient/Client	Cabell Huntin...	Carpark (visit...	23 Apr 2019	Pending	ISR 4 MINOR	boo
Patient/Client	Wattle Private	Adminstration	22 Feb 2019	Pending	ISR 4 MINOR	Johnson

- 3 **Display Deleted Incidents** – Click the Display dropdown list and select **Deleted Incidents**
- 4 Then click on the **Apply Settings** button. All deleted records will be displayed in the **Deleted Incidents** list

Selection Settings
✕

Selection Settings

Display:

Incidents Involving:

Date Entered:

Incident Date:

Notification Date:

Incident IDs:

Allow rows to expand vertically:

3

Posted Incidents
Inbox (Incidents)
Deleted Incidents
Accepted Incidents
All Incidents
Posted Incidents
Entered Incidents
Newly Assigned Incidents

From


From

From

To

To

To

- 4 **Select the record** - From the **Deleted Incidents** List select the record that you want to restore by clicking on the check box in the Selection State column
- 5 **Restore the record** – Click on the Restore icon  in the Selection State Menu. The record will now be visible in the **Inbox** or **Posted Incidents** Lists


DELETED INCIDENTS								
Drag a column header here to group by that column								
		Dist	ID	Notification Date	Reporters Name	Surname	Facility	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	3850	30 Apr 2019	Default User	www	Acacia Private
<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	3616	3 May 2011	Nurse, Mary	Smith	Acacia Private
<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	3603	18 Feb 2011	Nurse, Mary	Smith	Acacia Private
<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	<input checked="" type="checkbox"/>	3845	15 Oct 2011	Nurse, Mary	Smith	Acacia Private
<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	3581	31 Mar 2011	Nurse, Mary	Smith	Acacia Private





























Note: When an record is deleted the original reporter will still be able to see the Incident record in their **Review My -> Incidents (Entered Incidents)** list.

Entered							
Shows Incidents entered by you or							
Drag a column header here to group by that column							
	Archived	Dist	ID	Notification Date	Reporters Name		
		1	3697	7 Jan 2013	Default User		
		None	3695	14 Nov 2012	System Manager		
		None	3674	1 Aug 2012	Faulkner, Laura		
	Yes	1	3672	1 Aug 2012	Hayden, Anne		
		None	3671	1 Aug 2012	Nicolaidis, Christine		
		None	3667	1 Aug 2012	Nicolaidis, Christine		
	Yes	None	3635	6 Feb 2012	Default User		
		None	3617	21 May 2011	Nurse, Mary		
<input checked="" type="checkbox"/>		None	3845	3 May 2011	Nurse, Mary		
		None	3615	30 Apr 2011	Nurse, Mary		
		None	3584	21 Apr 2011	Nurse, Mary		

 **Archive**

Incident records that are entered by users will appear in their **Entered Incidents** list. There may be times when a user does not want to see all of the incidents in their **Entered Incidents** list view. For example, when a user has completed all their required work in a record or when the record has been marked as deleted in the **Incidents for Review** or **Posted Incidents** lists. To **Archive** a record do the following:

- 1 **Select the record** - From the Entered Incidents List select the record that you want to Archive by clicking on the check box in the Selection State column.
- 2 **Archive the record** - Click on the Archive icon  in the Selection State Menu.

       5 Entered Incidents Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.										
				None	<input type="checkbox"/>	3667	1 Aug 2012	Nicolaidis, Christine	McTest	
		Yes		None	<input type="checkbox"/>	3635	6 Feb 2012	Default User	Smith	
				None	<input type="checkbox"/>	3617	21 May 2011	Nurse, Mary	Smith	
					4	<input checked="" type="checkbox"/>	3845	3 May 2011	Nurse, Mary	Smith
				None	<input type="checkbox"/>	3615	30 Apr 2011	Nurse, Mary	Smith	
				None	<input type="checkbox"/>	3584	21 Apr 2011	Nurse, Mary	Smith	
				None	<input type="checkbox"/>	3533	28 Jul 2012	Brooks, Jason	Esler	
		Yes		None	<input type="checkbox"/>	3516	14 May 2012	Nurse, Mary	Smith	
		Yes		None	<input type="checkbox"/>	3510	15 Apr 2012	Nurse, Mary	Smith	

- 3 **Confirmation** – A confirmation message will be displayed under the Entered Incidents page title.

Entered Incidents

Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.

Archived status for item(s) 3845 has been set.


Restore an Archived Record

Once a record has been Archived from your Entered Incidents page under the My Workspace menu you will no longer see the record in the Entered Incidents page.

- 1 To restore the archived record, go to the **Entered Incidents** list.

Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.

te	Reporters Name	Surname	Facility	Location	Summary	Outcome
	G Lammens	Piper	Acacia Private	Ward G2 SDMH	Pt fell from chair. ...	ISR 4 MINOR

- 2 **Open Selection Settings** – Click on the cog  icon to open the Selection Settings window
- 3 **Showed Archived** – Tick the checkbox next to Show Archived

Selection Settings

Display:

Incidents Involving:

Date Entered: From To

Incident Date: From To

Notification Date: From To

Incident IDs:

Show Archived: **2**

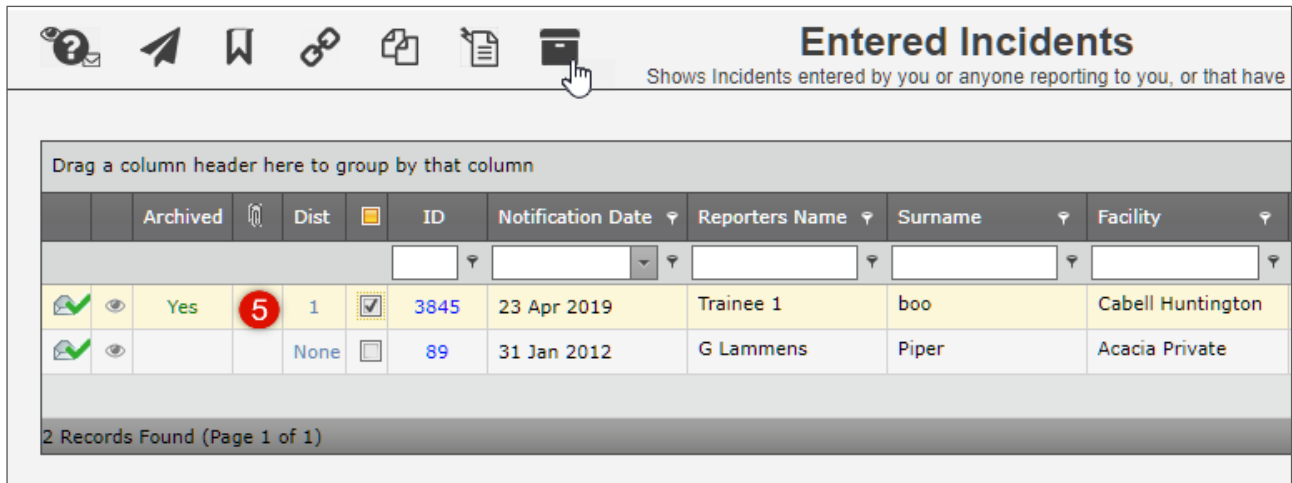
Allow rows to expand vertically:

Apply Settings **3**

Clear Layout

- 4 Then click on the **Apply Settings** button

- 5 Archives Status – The record you have recovered from the Archive will now be visible in your Entered Incidents list



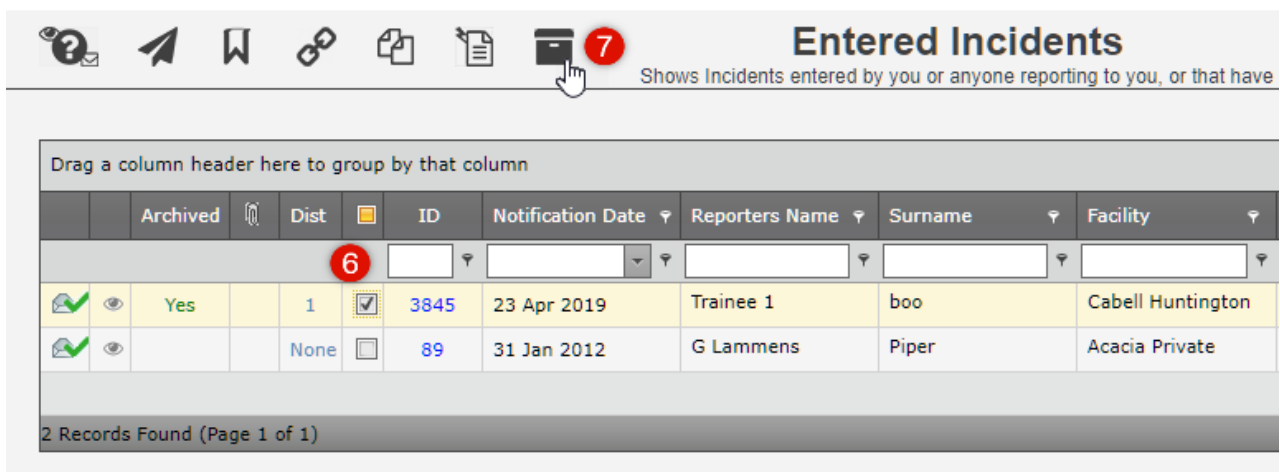
Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have

Drag a column header here to group by that column

Archived	Dist	ID	Notification Date	Reporters Name	Surname	Facility
Yes 5	1	3845	23 Apr 2019	Trainee 1	boo	Cabell Huntington
	None	89	31 Jan 2012	G Lammens	Piper	Acacia Private

2 Records Found (Page 1 of 1)

- 6 Select the record – Put a tick in the checkbox to select the record that you want to recover
- 7 Remove from Archive – Click on the Archive icon in the selection state menu



Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have

Drag a column header here to group by that column

Archived	Dist	ID	Notification Date	Reporters Name	Surname	Facility
Yes	1	3845	23 Apr 2019	Trainee 1	boo	Cabell Huntington
	None	89	31 Jan 2012	G Lammens	Piper	Acacia Private

2 Records Found (Page 1 of 1)

- 8 Confirmation – A confirmation message will be displayed under the Entered Incidents page title informing you that the archived record has been restored. The record you have recovered from the Archive will now be visible in your Entered Incidents list

Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.

Archived status for item(s) 3845 has been removed.