- Classification Editor -

FOR RISKMAN VERSION 2103

Last reviewed March 2021

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INTRODUCTION

This reference guide is aimed at Administrators who will be responsible for configuring and maintaining the RiskCat set of classifications to be used with Incident Entry and Incident Reports in RiskMan.

What is RiskCat?

RiskCat is the tool which provides users entering incidents with the ability to select the nature of an incident e.g. Aggression, Falls, Medication Errors, Infection Control, Injuries, Pressure Ulcers. These listings are grouped up to 3 levels:

Supergroups (top level)

Classes (second level)

Definitions (third level)

Your RiskMan Administrator has full control over the content and layout of your RiskCat and a remapping tool to enable you to re-map existing posted and/or unposted incidents from old classifications to new classifications
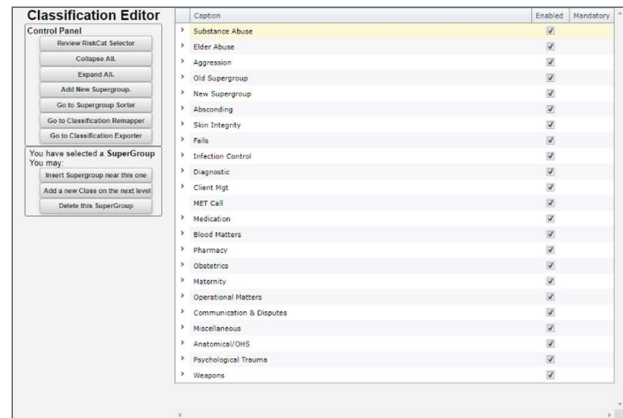
The administration and management of these classifications is done through the 'Classification Editor' tool which includes the following options:

- Ability to add new, delete existing, or rename Supergroups, Classes and Definitions
- Design the layout of the RiskCat by changing the order in which the Supergroups are displayed as well as the order in which the accompanying classes and definitions are displayed within each Supergroup
- Specify the text and background colours for each Supergroup (and accompanying Classes and Definitions)
- Specify which Supergroups are not displayed for specific "Incident Involved" types
- Ability to re-map existing unposted and/or posted incidents to new supergroups/classifications/ definitions

Note: If you wish additional customisations that are not available in the standard Classification Editor e.g. certain incident fields or sections are only displayed based on a selected classification, please contact support at RiskMan - support@riskman.net.au

THE CLASSIFICATION EDITOR

How do I access the Classification Editor?

The '**Classification Editor**' can be accessed by selecting *Administration -> Classification Editor* from the menu.

The Classification Editor is made up of four sections:

❶ The **Changes need saving** menu

❷ The Control Panel

❸ The selection menu

❹ The Classifications list

How do I add a new Supergroup?

Option 1: Placing a new Supergroup at the bottom of the list of Supergroups

❶ Click on the **Add New Supergroup** button

❷ Type the new Supergroup label in the **Node Name** field. You can choose to set the Supergroup enabled or disabled. Click the **Commit** button

❸ The new Supergroup will be added in the Classifications Editor list after the last item in the first row of the existing Classifications
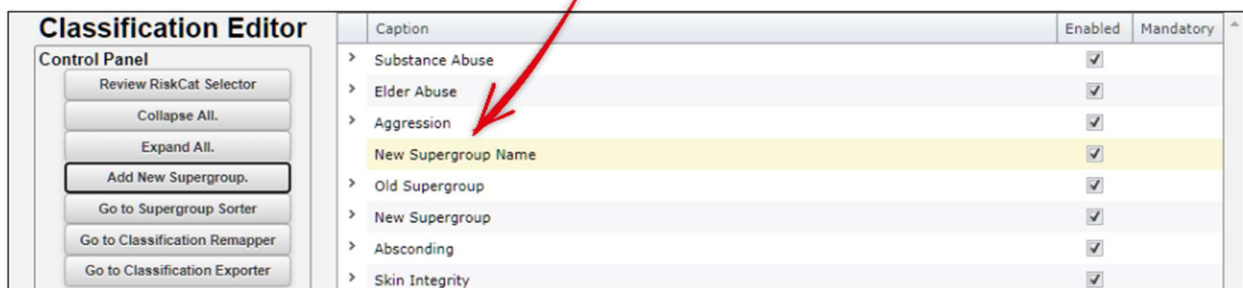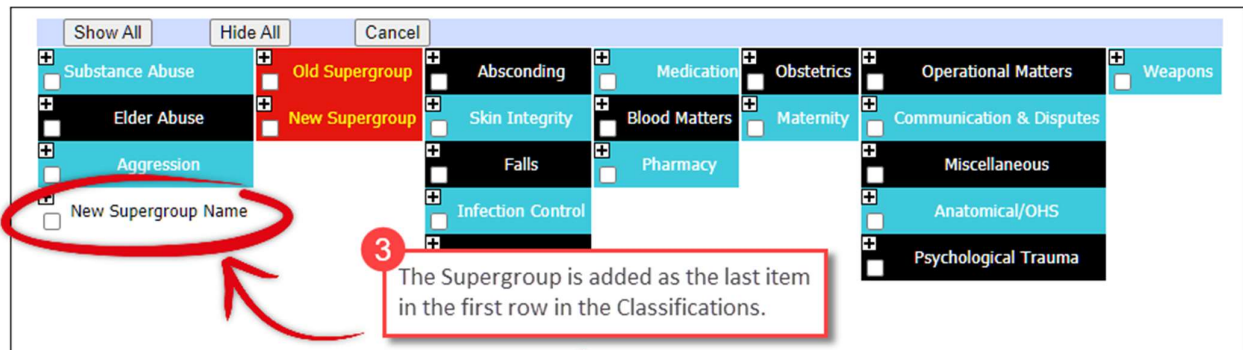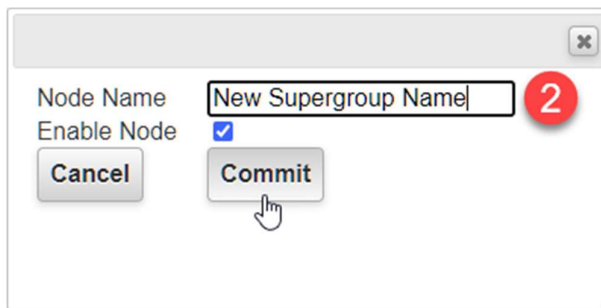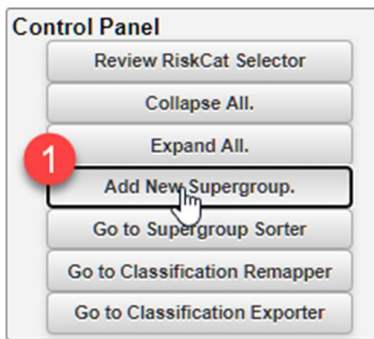
Option 2: Place the new Supergroup near a selected Supergroup

Highlight a Supergroup in the list, the position of the new Supergroup will be at the bottom of the Classifications row that your selected Supergroup is in.

❶ Click the **Insert Supergroup near this one** button

❷ Type the new Supergroup label in the **Node Name** field. You can choose to set the Supergroup enabled or disabled. Click the **Commit** button

❸ The new Supergroup will be added in the Classifications Editor list after the last item in the first row of the existing Classifications

How do I add a new Class?

**Option 1: Place a new Class at the end of a Supergroup listing**

❶ Highlight the Supergroup in the list that you want the Class to appear under

❷ Press the **Add a new Class on the next level** button

❸ Type the new Class label in the Node Name field. You can choose to set the Class enabled or disabled. Click the Commit button

❹ The new Class will be added in the Classifications Editor list after the last Class item in the Supergroup that was selected

Option 2: Place a new Class above or below a selected Class within a Supergroup

❶ Highlight the Class in the list where the new Class is to appear above or below it
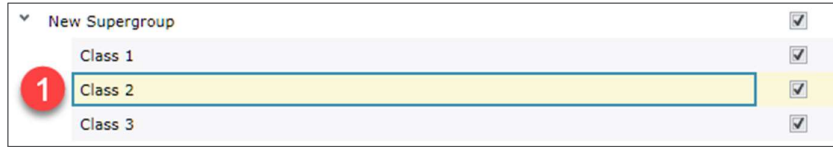
❷ Click the respective **Insert a Class above the selected one** or **Insert a Class below the selected one** link. A new label '**New Class**' will be added to the list.
Ensure that this label is selected (if not, by double click the label) and enter your new **Classification name**

❸ Type the new Class label in the Node Name field. You can choose to set the Class enabled or disabled. Click the **Commit** button

❹ The new Class will be added in the Classifications Editor list above or below the Class item that was selected

How do I add a new Definition?

Option 1: Place a new Definition at the end of a Class listing

❶ Highlight the Class in the list that the Definition is to appear under

❷ Press the **Add a Definition on the next level** button

❸ Type the new Definition label in the Node Name field. You can choose to set the Definition enabled or disabled. Click the **Commit** button

❹ The new Definition will be added in the Classifications Editor list below the Class item that was selected

Option 2: Placing the new Definition above or below a selected Definition within a Class

❶ Highlight the Definition in the list that the New Definition is to appear above or below

❷ Press the **Insert a Definition above** or **below the selection** button

❸ Type the new Definition label in the Node Name field. You can choose to set the Definition enabled or disabled. Click the **Commit** button

❹ The new Definition will be added in the Classifications Editor list below the Class item that was selected

Mandatory Classes

There is an option in the **Classifications Editor** that allows you to specify a Supergroup/Class combination to be a mandatory selection if it is displayed in the RiskCat.

❶ Click in the **Mandatory Class** checkbox in the Mandatory column that corresponds to the Supergroup . The **Changes need saving** menu will be displayed above the **Control Panel**

❷ Click the **Save Edits** button

How do I rename a Supergroup, Class or Definition?

❶ Double click the existing **Supergroup**, **Class** or **Definition** and enter the new label name. Click away from the text you have just entered. The **Changes need saving** menu will appear above the Control Panel menu.

❷ Press **Save edits** when ready to save

How do I delete a Supergroup, Class or Definition?

Depending on which item you select the **You have selected…** menu buttons will change to display the options related to your selection.
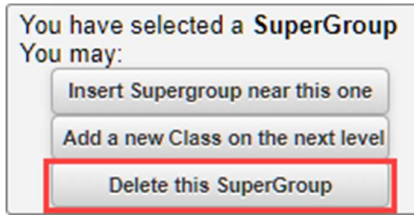
Supergroup selected menu   **Class** selected menu   **Definition** selected menu
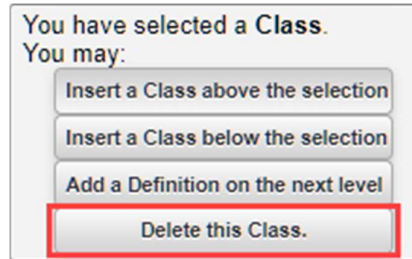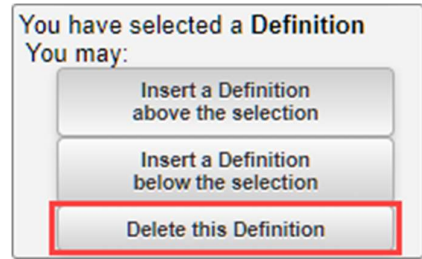
To delete a **Supergroup**, **Class** or **Definition** do the following:

❶ Highlight the **Supergroup**, **Class** or **Definition** in the list that you want to delete

❷ Press the respective **Delete this Supergroup**, **delete this Class** or **Delete this Definition** button in the **You have selected…** menu
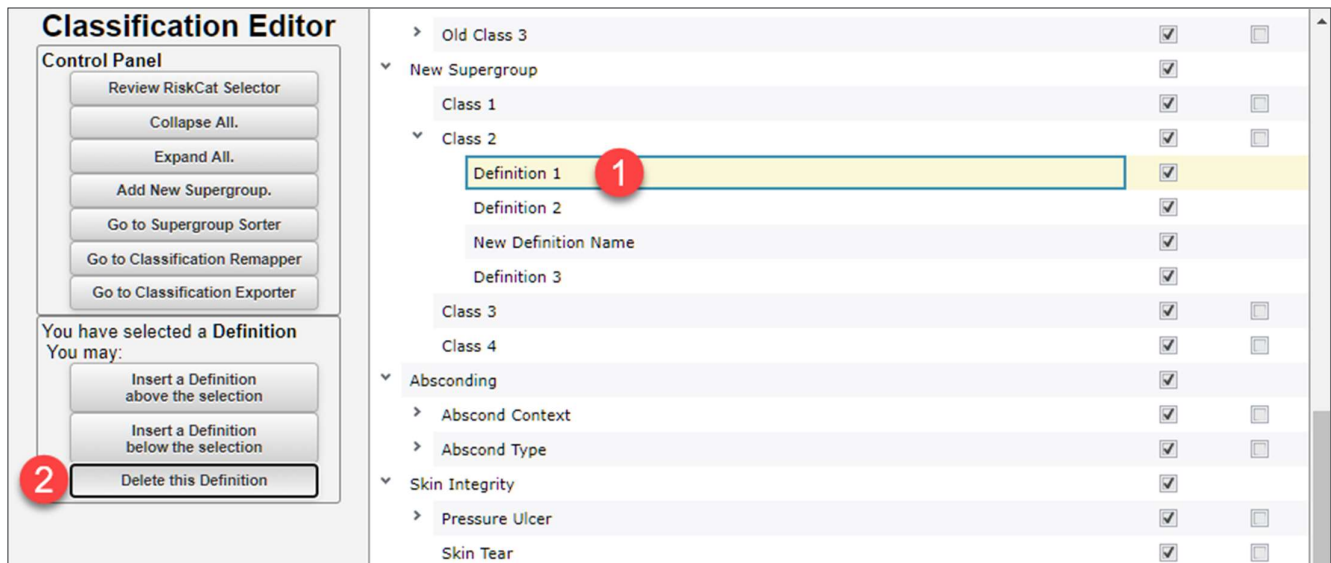
*Note: Once you click the **Delete this** button your selection will be deleted immediately. You will not need to save this action; it is automatically saved. You will not be asked to confirm the delete action!*

Can I change the layout of the RiskCat?

The order in which the Classes and Definitions appear in your RiskCat, as well as which Supergroup and/or Class they appear under can be done via the **'Classification Editor'** page.

The layout of the Supergroups needs to be edited via the '**Supergroup Sorter**' page.

Re-arrange Classes or Definitions

Moving a Class will also move the Definitions that belong to it. Definitions can be moved independent of the class they are under.

To reposition the Classes

❶ Click on the respective **Class** in the list. A blue line will appear around your selection `Class 3`

❷ Drag the **Class** over the Class you want it to appear under. You will see a yellow arrow ➡ appear identifying the target Class

❸ Release the mouse and the moved **Class** will be re-positioned accordingly (dropping a Class on a class will position it directly under the Class it was dropped on)
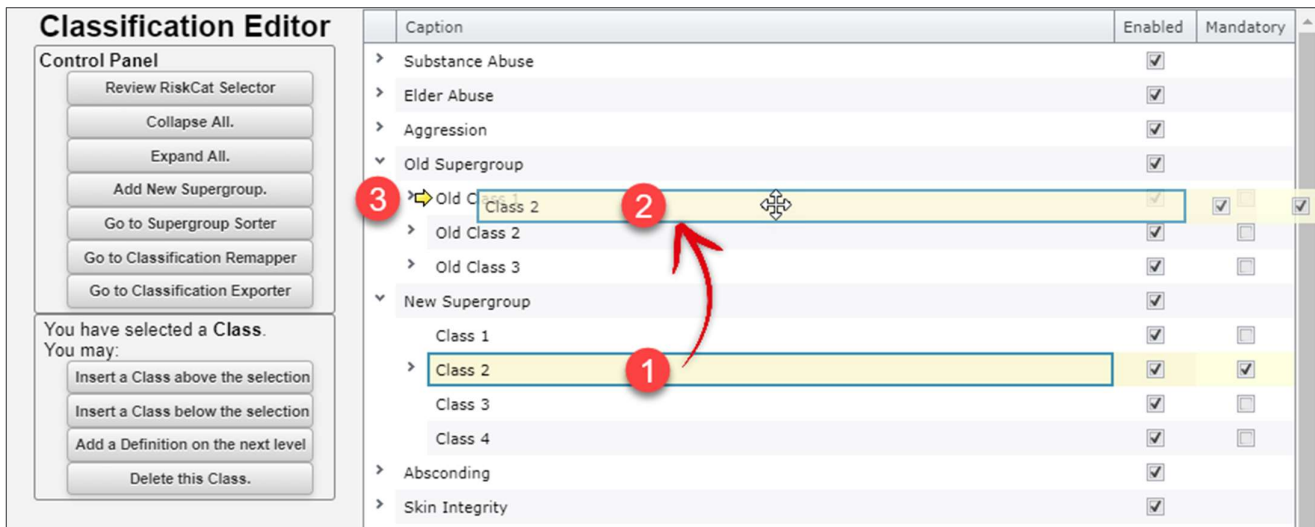
To move a Class to the top position

Position your chosen **Class** under the top Class and follow the previous "reposition the Class" instructions.

Position the Class just under the top Class.	Drag the top Class onto the Class you want above it and drop it.	The dropped the Class will now be positioned under the Class it was dropped on.

Note: You can move a Class to appear under a different Supergroup and the Class Definitions will be moved along with the Class to the new position.

To reposition the Supergroups

❶ Click on the **Go to 'Supergroup Sorter'** button.

❷ This will take you to the **'Classification Supergroup Sorter'** page

❸ To move a Supergroup, click on the ⊕ icon next to the respective Supergroup and drag to the desired position

❹ Press **Save Changes Now** when ready to save

Can I view the changes I have made to RiskCat?

To preview the RiskCat, you can display all __active__ Supergroups, Classes and Definitions, by clicking on the **'Review RiskCat Selector'** ❶ link which is available on __ANY__ page accessed from the Classification Editor.
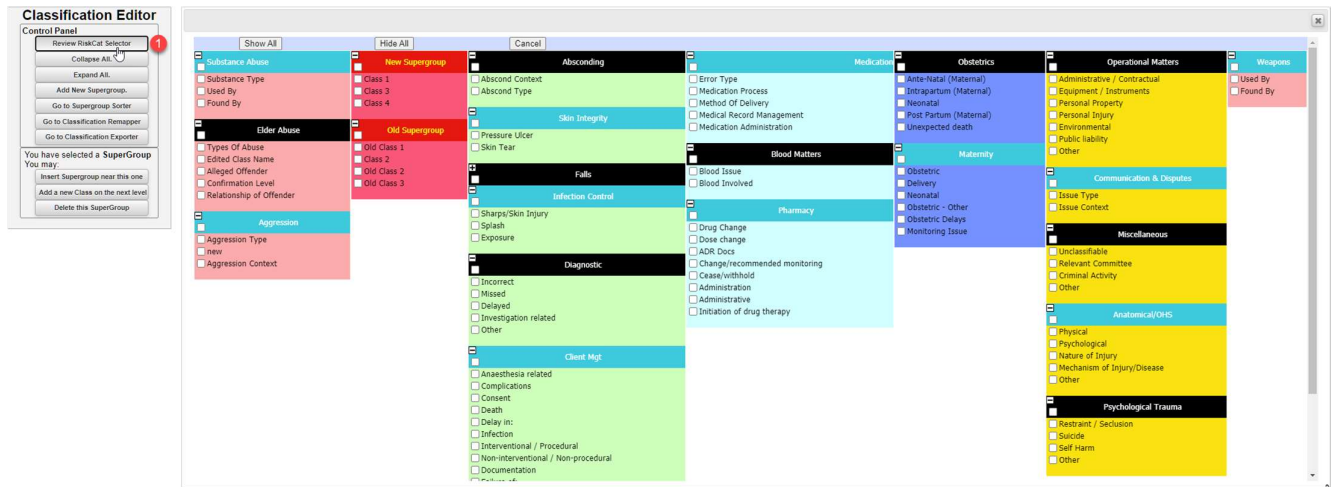
Can I printout the RiskCat Classifications?

A snapshot of your RiskCat, displaying all **active** Supergroups, Classes and Definitions, can be exported to Excel™ in spreadsheet format and printed from Excel™

❶ To export your classifications, click on the **'Goto the Classification Exporter'** link which is <u>ONLY</u> available on **'Classification Editor'** page

❷ To export your classifications to Excel™, click on the ![Excel] icon. The classifications will display in spreadsheet format.

Control Panel

| Review RiskCat Selector |
| Collapse All. |
| Expand All. |
| Add New Supergroup. |
| Go to Supergroup Sorter |
| Go to Classification Remapper |
| ① Go to Classification Exporter |

You have selected a **SuperGroup**
You may:

| Insert Supergroup near this one |
| Add a new Class on the next level |
| Delete this SuperGroup |

Classification Exporter

Return to the **'Classification Editor'**

| Edit Column	Delete Column	Supergroup	Class	Definition
Edit	Delete	Absconding	Abscond Context	Assessed At Risk
Edit	Delete	Absconding	Abscond Context	Known psychiatric diagnosis
Edit	Delete	Absconding	Abscond Context	Not Psychiatric Related
Edit	Delete	Absconding	Abscond Context	Previous attempts
Edit	Delete	Absconding	Abscond Context	Successful (Compromise)
Edit	Delete	Absconding	Abscond Context	Successful (No Compromise)
Edit	Delete	Absconding	Abscond Type	Attempted
Edit	Delete	Absconding	Abscond Type	Exit against medical advice
Edit	Delete	Absconding	Abscond Type	Exit prior to assessment

What does the 'Classification Supergroup Sorter' page do?

The Classification Supergroup Sorter page allows you to:

- Specify the colour of the backgrounds and labels of your Supergroups and your Classes/Definitions

- Hide specific Supergroups when certain 'Incident Involved' types are selected in the Incident Notification e.g. you may only want to view specific hazard related classifications for Hazard incidents and OH&S related Supergroups for OH&S and staff incidents

- Specify if a selection from a Supergroup is mandatory if that Supergroup is displayed in RiskCat

- Specify if the classifications under a Supergroup are expanded to Class or Definition level or not expanded at all, by default

- Specify the alignment of your Supergroup titles e.g. left, right or centred

To access the Classification Supergroup Sorter page

❶ Click on the '**Go to the Supergroup Sorter**' link on **ANY** of the Classification Editor pages

Modify the title text and background colours

❶ Click on the **Supergroup name**

❷ Click on the respective Change Color button and ❸ select a colour from the pop-up Color Picker

❹ If you know the hexadecimal colour code, type it next to the respective colour field

Example of how the colour selections affect your RiskCat

Copy and Paste a Supergroups details

The Details of a Supergroup include the following:

Text Colour ....Colour of the Classes and Definitions text

Text Background colour......................Colour of the background behind the Classes and Definitions text

Title Text Colour.................................Colour of the Supergroup text

Title Text Background colour ....Colour of the background behind the Supergroup text

Mandatory Supergroup setting ....It will be mandatory to select one item in the Supergroup

You may only select one item ....Only one item in this Supergroup is allowed to be selected

Initial State...Sets the expanded/contracted state of the supergroup in the RiskCat selector

Title Alignment ....Sets the Text alignment of the Supergroup Title

To copy and paste the details of a Soupergroup:

❶ Click on the **Supergroup** name that has the details

❷ Click on the Copy Details button

❸ Click on the **Supergroup** name that you want the copied details to be pasted into

❹ Click on the Paste Details button

❺ Click on the **Save Changes** button

Altering the visual layout of your Supergroups

You are able to define the default layout for your Supergroups, including whether a Supergroup will display

- Fully collapsed, fully expanded, or expanded to the Class level and
- Left Justified, Right Justified or Centred

To change the initial state of a Supergroup

❶ Click on the Supergroup name

❷ Select the desired option from the **Supergroup Initial State** list box

❸ Click on the **Save Changes** button

Suggestion: If you select "Fully Collapsed" position your Supergroups in one column - like a tree view. Refer to the section "How do I arrange my Supergroups into a tree view" for assistance

Expanded to Class

Default setting where RiskCat is expanded to the Class level (2nd level). Users can expand to the 3rd level by clicking on an individual Class or by pressing **Show All**

Fully Expanded

RiskCat will be expanded to Definition level (3rd level)

Fully Collapsed

RiskCat will not be expanded, and all that is viewed are the Supergroup headings. The user can then expand individual Supergroups to the Class and Definition levels or press **Show All** to fully expand all the classifications
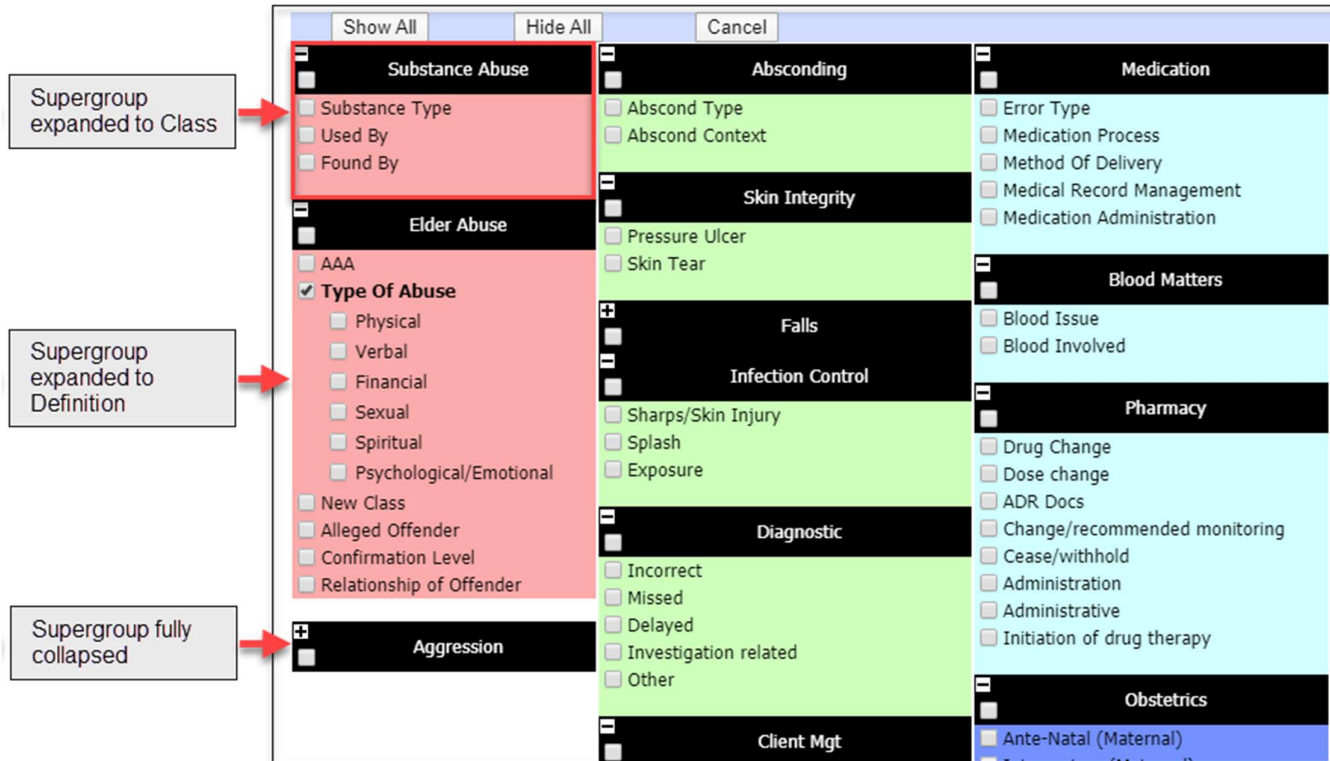
To change the title alignment for a Supergroup

❶ Click on the **Supergroup** name

❷ Select the desired alignment from the **Supergroup Title Alignment** dropdown box

❸ Click on the **Save Changes** button

Examples of Title Alignment

Supergroups can be hidden based on selected 'Incident Involved' types

Supergroups can be hidden based on a selected 'Incident Involved' type. For example, you may only want to show specific clinical Supergroups for Patient/Client/Resident incidents and OH&S specific Supergroups for Staff incidents

❶ Click on the **Supergroup** name

❷ Next to the **Hide the selected Supergroup when 'Incident Involved' is of** these **types**, highlight the 'Incident Involved' types that you wish this Supergroup to be **HIDDEN**

❸ Click on the **Save Changes** button

Note: Hold your CTRL key and click to select more than one 'incident involved' type

How do I arrange my Supergroups into a tree view?

❶ Drag the Supergroups into the first column, until there are no rows left and press **Save Changes Now**
You will notice that 3 additional blank rows have appeared.

If you have more Supergroups to arrange continue to drag your Supergroups to the blank rows. Once these rows are filled with Supergroups you will need to press **Save Changes Now** so save your changes and add an additional 3 blank rows to the first column

Continue with the above steps until you have dragged all your Supergroups to the one column

❷ Click on the **Save Changes** button

*Suggestion: If you wish to display your Supergroups in one column, change the **Supergroup Initial State = Fully Collapsed** to enable a tree view. In this way a user will not see all the classifications at once and can expand individual Supergroups and Classes to see the list of respective Definitions*

Example of your RiskCat arranged in a tree view

Example of one of the Supergroups expanded in RiskCat

To view the Classes & Definitions under a Supergroup, click on the respective **Expand [+]** button

What happens to my existing incidents if changes are made to RiskCat?

If you make changes to the classifications in RiskCat your existing incidents (unposted and posted) will still retain the classifications originally selected.

It is **STRONGLY RECOMMENDED** that you re-map your existing **posted** incidents (where applicable) to your new classification set. This is to ensure that you have consistency with your Incident Reporting. It is not necessary to re-map your unposted incidents as you may like to keep the originally selected classifications for historical purposes.

Re-mapping of RiskCat classifications can be done through the re-mapping tool which is available from any of the Classification Editor pages

To access the Classification Re-Mapper page

❶ Click on the **Goto the Classification Re-mapper** link in the respective 'Control panel'

Classification Re-mapper Options

Show the instructions

❶ This will display the simple re-mapping instructions, tick the Show Instructions Checkbox

Only show Orphaned classifications

❶ The Classifications displayed in the **Existing Classifications** window will be restricted to only those Classifications that are no longer listed in the RiskCat but have records that are associated with them. These are referred to as 'Orphaned Classifications' and should be re-mapped to a Defined Classification.
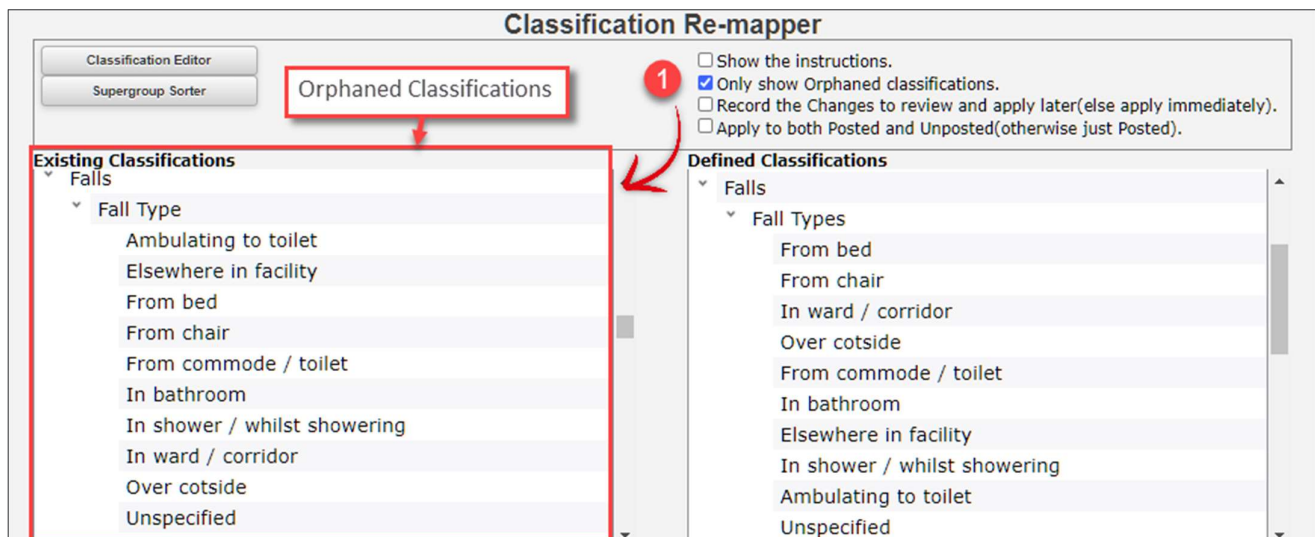
*NOTE: Orphaned Classifications displayed in the Existing Classifications window will be Orphan Classifications in Posted records exclusively unless you also select the **Apply to both Posted and Unposted** option.*

*NOTE: Orphaned Classifications that are **not** re-mapped will display a message in the RiskCat Selector along with a checkbox option to remove the Orphaned Classification from the record by unticking it.*
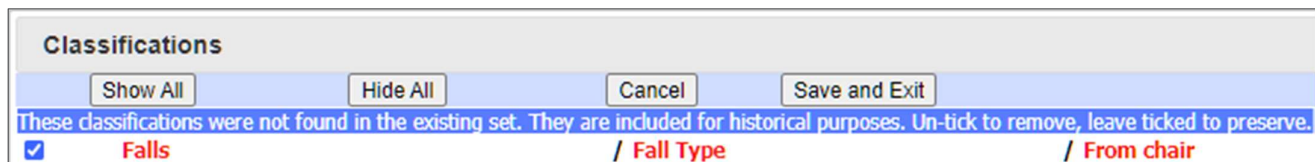
Record the Changes to review and apply later (else apply immediately)

All Re-Mapping changes are applied immediately upon dropping the Existing Class on the Defined Class. There will not be any chance to cancel your changes unless you turn on the Record the Changes option. The Re-map changes that you make will be recorded and **NOT** appl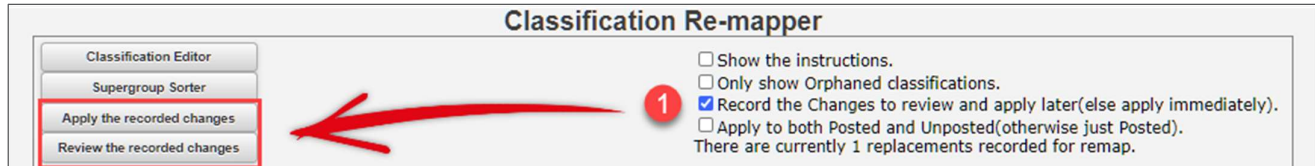ied until you click on the **Apply the recorded changes** button. Your changes are available for review by clicking on the **Review the recorded changes** button.

The Recorded Changes are displayed in the **Outstanding Remaps** window. The Old Supergroup, Class, and Definition are displayed as well as the New Supergroup, Class, and Definition. From this window you can chose to reject your remap changes by clicking on the **Delete** button.

To accept and save the remap changes:

❶ Close the **Outstanding Remaps** window

❷ Select **Apply the recorded changes** button. Your changes will be saved.
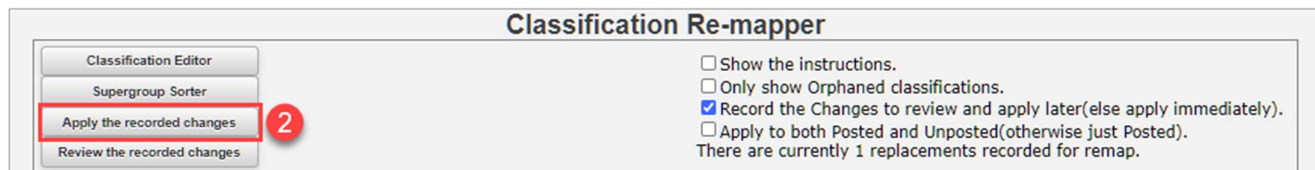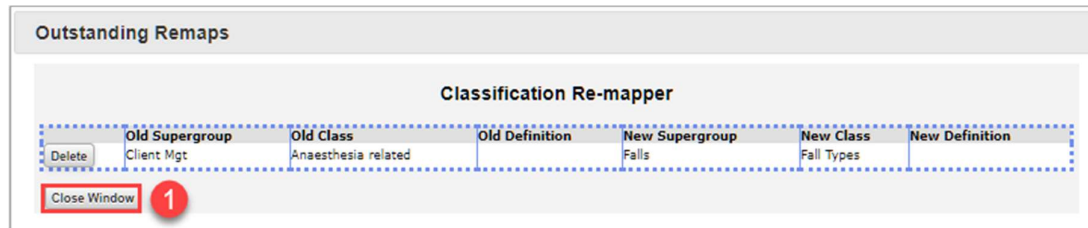
Apply to both Posted and Unposted (otherwise just Posted)
❶ This will apply your remap changes to both Posted and Unposted records.

If this option is unticked the changes will only be applied to the posted records in the system.
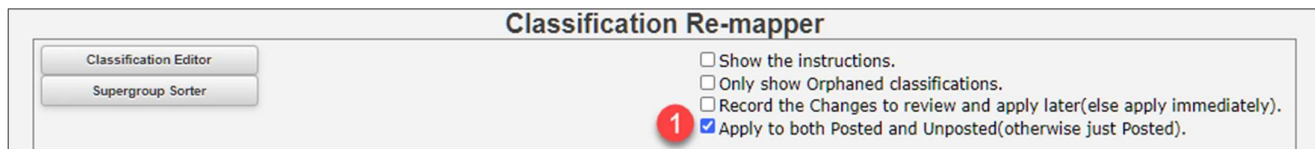
*NOTE: In RiskMan systems that auto-post records the '**Apply to both Posted and Unposted**' option will not appear in the Classification Re-mapper menu.*

Re-mapping Incidents to New Classifications

The Classification Re-mapper consists of two list views. **Existing Classifications** and **Defined Classifications**.

Existing Classifications are all the historic Supergroups, Classes, and Definitions that populated the RiskCat selector prior Classification edits.

Defined Classifications are all the Supergroups, Classes, and Definitions as they currently exist in the RiskCat selector including your Classification edits.

If the ❶ ☐ Apply to both Posted and Unposted(otherwise just Posted). is unchecked, the **Existing Classifications** list view will display classifications used by **Posted Incident** records.

If the ☑ Apply to both Posted and Unposted(otherwise just Posted). is checked, the Existing Classifications list view will display classifications used by **Posted and Unposted** records.

In both cases the list of "orphaned" classifications (ie. no longer available in RiskCat) will display in the left hand column labled ❷ **"Existing Classfications"**

Note: The ☑ Apply to both Posted and Unposted(otherwise just Posted). *checkbox not only changes the Existing Classifications list* ***view****, it also selects the type of records that are* ***going to be remapped****, Posted or Posted & Unposted*

To re-map the existing classes/definitions to the modified active RiskCat

❶ Click on the class or definition from the **Existing Classifications** list and holding your mouse,

❷ drag it over the top of the Class or Definition that you wish to re-map to in the **Defined Classification** list

The yellow arrow icon ⇨ identifies the Class/Definition remapping to

For each class/definition that is re-mapped, it will be removed from the **Existing Classifications** list on the left.

Once all the classes/definitions have been moved to the right and re-mapped for the selected Supergroup listing, the Supergroup that now has no Classes or Definitions will disappear from the **Existing Classifications** list on the left.

*Note: Ideally there should be no classifications listed in the **Existing Classifications** list after you have done the re-mapping*
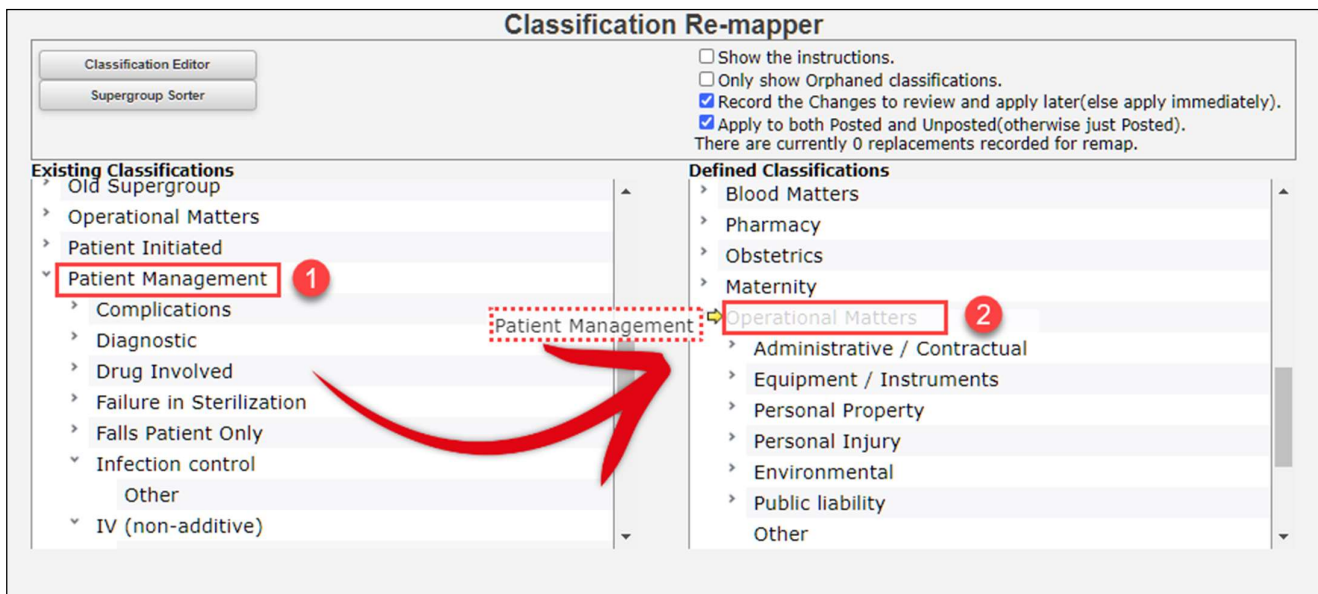
❸ Before you apply the changes check your changes by clicking on the **Review the recorded changes** link. A pop-up spreadsheet will display your changes.

❹ If a re-mapping is not correct, click on the respective **Delete** button. The classification will be available to re-map again from the **Existing Classifications** list

❺ Once you are happy with the re-mapping changes that you have done, click on the **Apply the recorded changes** link. The re-mapping will not take long

Once it is finished the **Apply the recorded changes** link will no longer be visible on the **'Classification Re-mapper'** page.