#### Introduction

This reference guide is aimed at RiskMan Administrators who will be responsible for maintaining your RiskMan system configuration and also to use some of the System Tools that are available in RiskMan. The descriptions and locations of each of the Global Settings can be located in the **Global Settings Descriptions Guide** accessible from the *Help -> Reference Guides* 

#### What do the System Configurations entail?

The System Configurations affect the overall operation of RiskMan. These settings include

- 1. **Global Settings** settings for all aspects of RiskMan (except Feedback). Some of these settings include
  - Colour Schemes
  - Naming Conventions for the Global fields used within the Registers
  - Default settings for the way fields appear e.g. Yes/No fields are displayed as radio buttons, lists or checkboxes; Date/time fields are drop down fields or free text; Organisation name which will appear on reports
  - Register Report output defaults e.g. PDF, Word™
  - Scheduling for your email notifications and alerts
  - Mail setup for your emails
  - Setup to link network logins to RiskMan (LDAP)
  - Register specific settings
- 2. Feedback Global Settings settings that are specific to the Feedback Register

**Note:** These settings will be incorporated into the Global Settings in a future release

- 3. Text editing tool for the front-page text
- 4. Licensing Details
- 5. Grid Defaults for Register Listing pages
- 6. Columns to display in the **Find Related Incidents** list for linking incidents to Feedback notifications
- 7. LDAP testing
- 8. Email Log
- 9. Attach Document Settings

### What user permissions do I need to access the System Configurations?

For a user to have permission to the Configuration Modules including the Global Settings, they will need the following Administrative Permission under the General tab

• Can modify Global Settings

#### How do I access the Configuration modules?

1. From the menu select *Administration -> Configuration* 



### **Global Settings**

To access the Global Settings for all aspects of RiskMan <u>except</u> Feedback, select from the menu Administration -> Configuration -> Global Settings

Global Settings					
Expend All Collegee All Double Click a row to Expand, Collapse or Edit Double Click when odling cancels the edit Changes are immediate.					
Label	# Value				
Administration					
Alerts					
Colour Schemes					
Documents					
Item Entry Defaults					
Licenzing					
Mail					
Nanagement Structure					
Naming Conventions					
Register Item Lists					
Registers					
Reports					
Scheduled Jobs					
Scheduler Service					
Security					
System Values					
Users					

These settings are grouped under logical headings. Some settings will be Register specific e.g. Quality, Risk Register, Incidents, Feedback and will appear in the **Registers** grouping.

Some general settings can also appear under a Register specific setting. If this is the case, the Register setting will take priority for that Register. For example, the **40) Enable Link (Multi-Person) entries** setting can be setup as a Register specific setting if Linked Items is only to be active for the Incident & Risk Registers but not for any other Register

 To view specific settings under a Grouping click on the respective Expand ">" icon 2. To view settings under all Groupings click on the **Expand All** button

Global Settings		
Excend All Colleges All Double Click a row to Excend. Colleges or Edit. Double Click when editing cancels the		
Label		Value
Administration		
10) The name of your Organisation.	Edit	BMI Healthcare - Development
20) How many minutes before Session Timeout?	Edit	45
30) Default number of days shown in Audit Log.	Edit	14
40) Allow users to display the 'Item explorer'.	Edit	Yes
50) Contact Help' Label.	Edit	BMI Healthcare Help
60) Contact Help' Email Address.	Edit	
70) Contact Help' Email Address is Region Specific.	Edit	No
80) What title to place in the title bar of the browser?		BMI Healthcare - Development
90) First month in financial year.	Edit	July
Alerts		
10) Nanager/Staff item permissions will be handled by Alerts.	Edit	Yes
20) Apply User Restrictions when creating Alerts.		No
30) When generating Alerts (Vsn 2), use Alternate Email Address if available.	Edit	No
Colour Schemes		
10) Which colour to use for system highlights?	Edit	B4C6D9
15) Which text colour to use for system highlights?	Edit	000000
20) Which colour to use for Mandatory fields?	Edit	FFFFCC
25) Which icon rollover colour to use (e.g. Inbox)?	Edit	84C6D9
30) Which colour scheme to use for the navigation buttons in the Control Panel of saved records?	Edit	XpBlue
40) Which colour theme to apply to the page containing the Main Nenu.		Office2010Silver
50) Which colour theme to apply generally		Office2010Blue
60) Repeated background Image URL to use in the greyed out section when timed out?	Edit	images/RMdevice.png
Documents		
10) Restrict the type of files which can be attached to a record?	Edit	No

Example: Sample of the Global Settings

3. The Settings specific to a Register e.g. Quality, Risk Register, Incidents, will appear under the **Registers** grouping

Global Settings					
Expand All	Collegest All Double Citck a row to Expand. Colleges or Edit. Double Citck when softing cancels the odd. Changes are immediate.				
Label	a Value				
> Administrat					
> Alerta					
> Colour Sch					
Documents					
> Item Entry	Dafadha				
> Licensing					
> Mail					
> Managamar	rl Shuttere				
Naming Co	ventions				
Register Ite	m Lints				
Registers					
Feedba	de la constanción de				
> Incider	ts in the second s				
<ul> <li>Rink</li> </ul>					
> Reports					
Scheduled.	labs				
Scheduler 5	ervice.				
> Security					
System Val	Jes State St				
> Users					



#### Can I search for a Setting?

- 1. Press the Expand All button to expand the settings
- 2. Press **CTRL F** to display the **Find 1** field in your Internet Explorer
- 3. Enter your search word and RiskMan will highlight the settings that contain that word **2**

Findt journal	Presious Nest 🥖 Options 🕶 13 matches		
	Demo Site		
💲 🗿 My Workspace - Ma	nagement + Administration + Reports + Help + Log Out		
* Form Options			
10) Select the display option for Y	es/No questions on item entry forms.	8 bB	Dropdown List
20) Mandatory setting for Date Of	Birth field applies to Items involving a Client only.	Edit	Yes
30) Date entry fields display optio	n.	Edit	Free form entry field
40) Username display style.		Edit	User Display Name (User Name)
50) How many Bens to show in a	multi-select lata?	5da	10
* Item Version Management			
10) Create an Unposted copy of th	a record when it is posted or reposted.	Ede	Yes
20) Description to appear above t	e "Post" and "Update the Postad Record" buttons on the form for the above function.	Edit	A copy of the updated form will b
20) Make the above action the det	witt.	Edit	Yes
40) "Can review own/subordinates	entries" edit mode when "Allow item entry" is OFF	Edit	Allow Edits even if "Allow item en
* Journals			
10) Enable Journal Estry.		Edit	Yes
20) Make the "Journal Type" field	on journals to be mandatory.	Edit	No
30) CC Journal Creator when Jour	al Alert Reminder is sent.	Edit	Yes
40) When a Journal is actioned, it	is mandatory to enter the "Task Outcome" and "Task Completed Date" fields.	pde	No
50) Allow users to change Date an	d Time Stamp on Journals	Edit	Yes
10) Allow users to modify forms, main	taining all versions.	Edit	Yes
20) Allow users to add Notes to existin	a forma.	Ede	No

**Example:** Using the Find field to search for Global Settings that contains the word "Journal"

#### How do I modify a Setting?

- 1. Locate the setting by expanding the list
- 2. Double click the setting
  - A description of this setting will also be displayed

Global Se	ttings	
rpand All Collapse All Double Click a row to Expand, Collapse or Edit. Double Click when editing c	ancels the edit. Ci	langes are immediate.
Label		Value
Administration		
Alerts		
Colour Schemes		
Documents		
Item Entry Defaults		
<ul> <li>Distribution Lists</li> </ul>		
10) Enable Distribution lists.	Edit	Yes
20) Make Distribution list sequential.	Edit	No
30) Send ENail notification to users on a distribution list.	Edit	Yes
40) Send only one EMail notification to each u	ser on a	distribution list.
40) Send only one EMail notification to each un *Ves : No by checking this option, an notification will only be sent once to a person on notification has been forwarded. Note: if there are existing users on the Distance of more users to the fit and on where Additional comments to be included enabled. upper converting the sent and notification unless the next setting. "By the next setting of the sent of the sent of the sent of the setting of the next setting of the setting of the setting of the sent setting."	a Distribution I ibution list it r in the Distribu	ist if additional personnel are added after the corresponding neans the users have not viewed the notification as yet. If yo tion List email, then ALL users (even those aiready sent an
WYES : NO           By checking this option, an notification will only be sent once to a person on notification has been forwarded. Next: if lower are existing users on the Dott multiple in the sent and	a Distribution I ibution list it r in the Distribu end Distributi	In If additional personnel are added after the corresponding return the users have not severed the restitutions as yet. If you for Uist small, the Uist green these already yet. If you on List email and List users (even these already yet. If on List email again, even if email comments are entered is
Proc. Two     The set of the	a Distribution I ibution list it r in the Distribution cend Distribution Edit	In If sudditional personnel are added after the corresponding means the users have not viewed the notification as yet. If yo foro List email, then ALL users (even those already sent an on List email and again, even if email comments are entered" is Yos
Yes: CH0     The CH2     Set CH2	a Distribution I ibution list it r in the Distribu end Distributi	In If additional personnal are added after the corresponding return the users have not seened the additisation as yet? If the User and its mol Liu users (even those already yet? are non List email and the Liu users (even those already yet? and no List email again, even if email comments are entered' is
Proc. Two     The set of the	a Distribution I ibution list it r in the Distribution cend Distribution Edit	In If sudditional personnel are added after the corresponding means the users have not viewed the notification as yet. If yo foro List email, then ALL users (even those already sent an on List email and again, even if email comments are entered" is Yos

- Modify the setting as required e.g. select Yes/No; select an item from a list
- Press the Update button if you wish to save your modification, otherwise press Cancel

#### How do I create a Register Specific Global Setting?

Some of the Global Settings affect all Registers E.g. *Enable Link (Multi-Person) entries* and some settings are specific to only one Register E.g. *Risk Register Risk Matrix display style* which is located under the **Register | Risk Register** Global settings list and only relevant to the Risk Register

However, if you would like a Global Setting to also be Register specific because you would like a different state of that setting in a particular Register, you can make a Register Specific Version

- 1. To create a register specific setting, double click the setting
- 2. Press the Make Register Specific Version 0 button

10) Select the d	lisplay option fo	r Yes/No questions on item entry forms.	Edit Dropdown Li	ist
20) Mar	ndatory	setting for Date Of Birth fiel	applies to Items	involving a Client only.
•Yes No It is likely th		g will only apply to the Incident register. It is o	nfigured as a generic setting t	to provide a default for all registers. 🛛 🔞
Update	Cancel			Nake Register Specific Version

- 3. In the pop-up window
  - Select the Register 2 to add this setting to
  - Modify the Help <sup>(3)</sup> text if required
  - Press Save or Discard 4

lease Note: Not all settings can be mad ome simply don't make sense(usually ti form RiskMan Support if you encounter	these will not even offer the option), and some may not yet be suitably configured in code. It will not hun er one that doesn't work.	to try.
egister to add setting for:	· · · · · · · · · · · · · · · · · · ·	
lobal Setting Name:	Event	
elp Text	Feedback 🔗	
X 0 0 0 0 0 0 0 0	X' X,  E Risk 🕊 T 🔩 🔛	
Normal Arial	+ (Font Size) + B I U + ≣ Ξ Ξ ∞ + A +	

- The setting will appear under the specific Register Name under the *Register* grouping.
- 5. Locate the new setting under the specific Register folder and modify as required
- 6. RiskMan will use the Register specific setting rather than the Global Setting

#### **RiskMan Text Editor**

This option allows you to configure the front-page text.

- 1. To access this page, select Administration -> Configuration -> RiskMan Text Editor
- Press the Edit button next to the Edit the Login Page Text option

1	My Workspace	Management   Administration   Reports   Help   Log Out   USER: System Manager (Manager)
		RiskMan Text Editor
	Edit	Edit the Login Page Text.
	Edit	Edit the "Incident Saved" Acknowledgement Message.

**Note:** The Acknowledgement page that can appear after an incident is submitted and before you get to the Confirmation page is normally turned off. If you wish to know more about this page refer to the **RiskMan System Configuration & Tools Description** *Guide* 

- 3. The **Design** mode allows you to edit the text on the front page
- The HTML mode allows you to apply more advanced styles for your front page as well as incorporating logos and pictures. Knowledge of HTML is required
- 5. Modify the text and layout as required and press the





**Note:** If you want to be able to edit text on other pages within RiskMan e.g. The Create New Login page refer to **Text Editor Tool** under the **Administration -> Tools** menu

### <u>Setting the Default Grid Layouts for Register</u> <u>Listing Pages</u>

This setting allows you to set the default grid layouts of your Register listing pages e.g. Incident Inbox, Entered Incidents, Posted Incidents, Entered Activities, Entered Risks etc

# **Note:** This option is <u>not</u> available for Feedback Listing pages in this version

The grid layout consists of the columns that are displayed on each of the listing pages and also the column widths

When an Administrator, the person who has the Administrative permission: Can modify Global Settings, configures all the listing pages under their login, they can set all other user's listing pages to match - provided the user has never made changes to these listings

- Under the Administrator's login, configure the columns and column widths for all the Register specific listing pages
- 2. From the menu, select Administration -> Configuration -> Inbox Default Columns

🤹 😜 My Workspace   Management   Administration   Reports   Help   Log Out	USER: System Manager (Manager)
Set Inbox Grid Column Defaults	
This tool can be used to set the Daffeld Isyou for all of the Oriol listing papes, such as Tohoo. Esteved Teens, Posterad Teens and other with the endected Columns, regardings, column within and other such a stratings. All Remain which you can be the dishibit or membership with the default. This includes safetcate columns, for example, but not filters applied to the grid as these are cleaned when you log out. Please a values, a.g. Estema Teens	hen you log out and then log back in will become part of
Once you are happy with your layouts, you can return have and Click the butten balow. This will take your settings and make them into del their settings will not be affected. When a user accesses the Grid Listing pages for the first time, they will be presented with the grid in the	
If these defaults have never been set up, then the user will start with a pre-defined set of columns,	
Registers Concession Data	
Save the Grid Defaults 2	
Incident default last updated on 7 Oct 2009 12:49 by System Manager (Manager) Risk default last updated on 14 May 2012 16:12 by (Not Specified)	

3. Highlight the Registers **1** that you wish to update - (you can highlight more than one by holding your CTRL key and clicking on the respective Registers in the list)

- 4. Press Save the Grid Defaults @
- Only listing pages that a user has not modified i.e. changed the columns and/or column widths, will have their respective listing pages updated

#### Adding or Updating your RiskMan Licence

All organisations hosting their own RiskMan will require a **Licence Key**. The licence key will be dependent on your RiskMan licence agreement with RiskMan International Pty Ltd. Each licence key will have an expiry date and once the licence key is expired or about to expire, a new licence key will need to be obtained. An expired licence will result in the inability to create users in the User Profiles – all other aspects of RiskMan will still be functional. Once you have applied for a licence, a licence key will be forwarded to you in a file which will need to be uploaded into RiskMan via the Licensing page

#### To access the Licensing Page

- From the menu, select Administration -> Configuration
   -> Licensing
- To obtain a licence, you will need to contact support who will send a licence key <u>support@riskman.net.au</u>
  - When the licence key is forwarded to you, save it locally

There are two ways to upload your new licence details.

Either upload the licence key file sent from support or copy and paste the contents from that same file **0** 

		Risk	lan Licencing		
RiskMan licencing	is based around a specifi	ic database. This sup	ports web farms and web garder	s. This implementation h	as these details.
Database Server	Name:		Database Name: Ri	skManHQ	
Your current Lice	ence details.				
Licence GUID 6111dbd4-ab88			x88-4a92-a5bf-af21		
SiteID 10000					
Site Name		RiskManHQ			
Implementation 1	Type	Live			
Comment		RiskManHQ			
Licence keys.					
Sequence	Key		Friendly Name	Expiry Date	Value
1	Register All_Regis	ters	All Registers	31 Dec 2019	100
To update your Li You may upload th Or paste the Licen	ne file from a local drive:			Brown	98(
Upload your Licenc	e details				
Current Register S	Status				
Register Name			Submodule Nam		ve Users
Action Register			Incidents	58	
Issues Register					

### LDAP Testing

If your IT Department has configured RiskMan to use organisational Network Login accounts, there are 3 LDAP Configuration options that you can use to

- Search for a user to see if they have a network account
- Test that the LDAP configuration is working from RiskMan to your Network accounts

• Import User Profiles on your Network into RiskMan

**Note:** Prior versions required Users to contact RiskMan Support to obtain an Authentication code in order to be able to conduct LDAP testing. This requirement has now been removed. LDAP Login testing no longer requires an Authentication code.

# To test searching for a user on your network to ensure the LDAP configuration has been setup correctly

1. From the menu select Administration -> Configuration -> LDAP Test User Search

P Find Network Users Webpage Dialog	
Find a Network User	
	Search Cancel
There are no items to show in t For security and performance reasons, searches are limited to 30 results.	this view

#### 2. Enter your search criteria and press Search

**Note:** The way you search for users will depend on how your IT Dept has setup the search string. Not all search strings are the same. An \* acts like a wildcard e.g. Anne\* will search for all users whose name starts with "Anne"

anne*			
		Search	Cancel
Jser	Display Name	Mail	
Anne Hayden	Anne Hayden	anne@riskman.ne	t.au

#### <u>To test the connection between RiskMan and your</u> <u>Network logins</u>

1. From the menu select Administration -> Configuration -> LDAP Test Login

Test LDAP logins Webpage Dialog	X
Test the LDAP Login	
sername:	
assword:	
Test the Network Login	

2. Enter your Network Username and Password



- 3. Press Test the Network Login button
  - A message will appear if you are successful or not. If you are not successful you may need to consult your IT Department or RiskMan Support -<u>support@riskman.net.au</u>

Test the LI	AP Login		-
Username: anne hayden Password:	]		
Test the Network Login	1		
Authenticated successfully to the N	stwork account		
	etwork account	ŝ	
	etwork account		
Authenticated successfully to the N Related RiskMan Account: Found	atwork account		

#### Email Log

All emails that are sent from RiskMan are logged into the database. The Email Log page allows Administrators to review the email logs to ascertain if emails are being sent or not. This is useful

- If you are investigating why users may not be receiving email notifications i.e. incorrect email address; mail server has changed and is not updated in your Global Settings; emails have stopped being sent from RiskMan
- Tracking emails that have been sent to a particular user

#### To access the Email Log

- From the menu select Administration -> Configuration

   -> Email Log
  - By default a list of unsent emails will be displayed

			Emai	LUg			
Insent Only 🔽	From Date 23/04/	2012	To Date 23/05/2	012	Reason Sent (All 1	tens)	<ul> <li>Refresh</li> </ul>
Mark as sent		<ul> <li>Mark as Ser</li> </ul>	it 100				
ouble Click a row to v	iew the Email.						
Change Columns	Expand Al	Collapse All	Export				
Drag a column he	ader here to group	by that column					
EmailID	Date Added	Date Sent	Recipient Addresses	Subject	Last Error	Trys	Last Send Attempt
\$	• •	• •	♥	♥	\$	2	• •
42	22/05/2012		anna.leone@petermac.	Riskman Delegate Notification		0	
41	15/05/2012		ternille.lewin@peterm:	Alert 67 from RiskMan: High Risk Radiation Therapy Incident Notification		0	
40	15/05/2012		jim.cramb@patermac.c	Alert 66 from RiskMan: High Risk Incident Notification		0	
39	15/05/2012			RiskMan Alert Error		0	
38	15/05/2012			RiskMan Alert Error		0	
37	15/05/2012			RiskMan Alert Error		0	
36	15/05/2012			RiskMan Alert Error		0	
35	15/05/2012			RiskMan Alert Error		0	
34	15/05/2012			RiskMan Alert Error		0	
33	15/05/2012			RiskMan Alert Error		0	
32	15/05/2012			RiskMan Alert Error		0	
31	15/05/2012			RiskMan Alert Error		0	
30	15/05/2012			RiskMan Alert Error		0	
29	15/05/2012			RiskMan Alert Error		0	
28	15/05/2012			RiskMan Alert Error		0	
Page 1 of 3 (39 item	ns) 🔄 [1] 2 3	>					

- 2. If you want to view all emails that have been sent
  - Uncheck "Unsent Only" 1
  - Modify the Date Range (when the email was logged to be sent)
  - Filter the type of emails that you wish to preview from the Reason Sent <sup>(2)</sup> field e.g. Alerts, Distribution Lists
  - Press Refresh 4

			Emai	il Log		ß	4
nsent Only 🔳 በ	From Da	te 23/04/2012	To Date	23/05/2012	Reason Sent	Distribution List	- Refre
Mark as sent		<ul> <li>Mark as Sent</li> </ul>	9				
ouble Click a row to vie	w the Email.						
Change Columns	Expand Al	Collapse All	Export				
Drag a column hear Email10	der here to group by Date Added	Date Sent	Recipient Addresses	Subject	Last Error	Tota	Last Send Attempt
2	- 2	- ?	2		2 3	2	
♥ 81567	11/05/2012	11/05/2012	anne@riskman.ret.au	RISKMAN.NET Item Review Request	۶ <u>م</u>	•	
				RISKMAN/NET Item	0		
81567 80991	11/05/2012	11/05/2012	anne@riskman.net.au	RISKMAN.NET Item Review Request RISKMAN.NET Item	2	0	
81567 80991 80954	11/05/2012 3/05/2012	11/05/2012 3/05/2012	anne@riskman.net.au Sanjay§riakman.net.au	RISKMAN.NET Item Review Request RISKMAN.NET Item Review Request RISKMAN.NET Item	0 0	0	

# **Example:** This list shows all the Distribution List emails that have been sent in the last month

- 3. To open an email click on the **Email ID** link in the list
  - If the email address of the person who is to receive the email is incorrect, change the email address in the Recipient Addresses and/or CC Recipient Addresses field 1
  - If the **Date Sent 2** field is not empty, clear the content of this field
  - Other changes can be made to the email, e.g. email subject, email body <sup>6</sup>
  - Press Save Changes ④ at the bottom of the email
  - The email will be re-sent when the next email scheduling cycle begins on your RiskMan

ase note: Under the	current Email sending scheme the SMTP server used will be picked up from the global setting, so changes here would have no effect.	
ate Added	22 May 2012 12:06	
ate Sent	2	
cipient Names	leone anna	
cipient Addresses	annaleone@petermac.org	
	s anne@riskman.net.au	
bject	Riskman Delegate Notification	
ML Body	X 이 탑 등(여 전(명) x x (日 日 리 글 @ @ 미 것	
<u> </u>		
<b>B</b> 1		
-		
	Design HTML Preview	
dy		*
	leone anna (Leone Anna),	<u>.</u>
-,	leone anna (Leone Anna). Hayden, Anne (ahayden) has granted you access to use their RiskMan account, to take affect from 22 May 2012 to 31 May 2012.	Ê
	Hayden, Anne (ahayden) has granted you access to use their RiskMan account, to take affect from 22 May 2012 to 31 May 2012. To assume the (dentity of Hayden, Anne (aharden), bo into RiskMan using your own username and password, and from the manu, select	Ē
	Hayden, Anne (ahayden) has granted you access to use their RiskMan account, to take affect from 22 May 2012 to 31 May 2012.	
	Hayden, Anne (ahayden) has granted you access to use their RishNan account, to take affect from 22 May 2012 to 31 May 2012. To assume the (desthy of Hayden, Anne (ahayden), bog into RishNan using your own username and passmed, and from the menu, select (by Workspace - Ny Iobenty and it do in the State) full of for types, Anne (ahayden, You will than be switched to the Hayden, Anne (bhayden) account and be able to take on their RishNan permissions and responsibilities.	• •
ername	Nayden. Anne (ahayden) has granted you access to use than Riakitan account, to take affect from 22 May 2012 to 31 May 2012. To acceme the Stantisty of Insystem, Anne (ahayden), log into Riakitan usen your own carement and passand, and from the menu, select (hahaden) account and be able to take on their Riakitan permissions and responsibilities.	•
ername ply To Address	Hayden, Anne (ahayden) has granted you access to use their RishNan account, to take affect from 22 May 2012 to 31 May 2012. To assume the (desthy of Hayden, Anne (ahayden), bog into RishNan using your own username and passmed, and from the menu, select (by Workspace - Ny Iobenty and it do in the State) full of for types, Anne (ahayden, You will than be switched to the Hayden, Anne (bhayden) account and be able to take on their RishNan permissions and responsibilities.	* m +
ername ply To Address TP Server	Nayden. Anne (ahayden) has granted you access to use than Riakitan account, to take affect from 22 May 2012 to 31 May 2012. To acceme the Stantisty of Insystem, Anne (ahayden), log into Riakitan usen your own carement and passand, and from the menu, select (hahaden) account and be able to take on their Riakitan permissions and responsibilities.	• m •
ername ply To Address TP Server	Nayden. Anne (ahayden) has granted you access to use than Riakitan account, to take affect from 22 May 2012 to 31 May 2012. To acceme the Stantisty of Insystem, Anne (ahayden), log into Riakitan usen your own carement and passand, and from the menu, select (hahaden) account and be able to take on their Riakitan permissions and responsibilities.	* III +
ername oly To Address IP Server sder Name	Nayden. Anne (ahayden) has granted you access to use than Riakitan account, to take affect from 22 May 2012 to 31 May 2012. To acceme the Stantisty of Insystem, Anne (ahayden), log into Riakitan usen your own carement and passand, and from the menu, select (hahaden) account and be able to take on their Riakitan permissions and responsibilities.	•
ername ply To Address TP Server nder Name nder Address	negrator, none (delogrador) has graned you excess to use the WitMAN associate, to take affect from 22 Mp. 2021 0.31 Mp. 2020. The assemuse the Discussion of Integration, Non-Integration of Integratory, You and Back be asticulated to the Response of Montechnological and the Montechnological and	*
ername bly To Address TP Server Ider Name Ider Address It Reason	negrink, nana (akayakan) kao gawaka iyu kacasa tu usu the WaldAka ancunut, to tuka affett from 22 Mg 2022 th 21 Mg 2020. To asama Ma Calendar di watada, kao di akayaka ku juga Ma Salaka ang ang ang ang ang ang ang ang ang an	
ername ply To Address ply To Address Inder Name Inder Address Int Reason Irrce	negrink, nana (akayakan) kao gawaka iyu kacasa tu usu the WaldAka ancunut, to tuka affett from 22 Mg 2022 th 21 Mg 2020. To asama Ma Calendar di watada, kao di akayaka ku juga Ma Salaka ang ang ang ang ang ang ang ang ang an	*
ername ply To Addreau TP Server nder Addreas nder Addreas nt Reason urce urce ID	negrint, man (akayatan) kao garand nyo kaosa to usa the WitMake annou. Ito bia affect from 22 Mg 2020. 10: Mg 2010. 10: Mg	*
ername ply To Addreas TD Server nder Name nder Address nt Reason wrce urce ID or Count	negrint, man (akayatan) kao garand nyo kaosa to usa the WitMake annou. Ito bia affect from 22 Mg 2020. 10: Mg 2010. 10: Mg	*
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ername ply To Address TIP Server inder Name inder Address int Reason urce ID urce ID urce ID to for Count st Error ror on Last Try	negrin, nang (akangkan) kas gawand you konsu thi vas kiteen Muldiken asscrut, to taka affest from 22 Mg 2021 B 21 Mg 2018. Taka suras has folgering de Margel, Ansee (schedur) has joint Suldiken assorut, to taka affest from 22 Mg 2021 B 21 Mg 2018. Taka suras has folgering de Margel, Ansee (schedur) has joint Suldiken agemmannen and segensetabilities. Managem deraweedfinismen net.aw Rahman Darlegate todification 0	*
arriana apply To Address aftip Server ander Address int Reason surce surce 10 voor Count tet Eroor voor on Last Try Cose	negrint, man (akayatan) kao garand nyo kaosa to usa the WitMake annou. Ito bia affect from 22 Mg 2020. 10: Mg 2010. 10: Mg	* HI +
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ername phy To Address ITP Server ITP Server ander Address int Reason urce a urce 10 urce 10 ur	negrin, nang (akangkan) kas gawand you konsu thi vas kiteen Muldiken asscrut, to taka affest from 22 Mg 2021 B 21 Mg 2018. Taka suras has folgering de Margel, Ansee (schedur) has joint Suldiken assorut, to taka affest from 22 Mg 2021 B 21 Mg 2018. Taka suras has folgering de Margel, Ansee (schedur) has joint Suldiken agemmannen and segensetabilities. Managem deraweedfinismen net.aw Rahman Darlegate todification 0	•

- 4. If you want to search for emails sent to a user
  - Ensure you have Unsent Email 

     unchecked so you are displaying the Sent Email
  - Enter the date range 2 when the emails were sent
  - Ensure Reason Sent = All Items 6
  - Filter the Recipient Addresses ④ field by entering the first part of the user's email address (as in the example below). The system will automatically filter once you have entered your filter criteria

			Ema	il Log		ß
Jnsent Only 📰 🚺	From Date	23/04/2012	Tooate 2	3/05/2012	Reason Sent	(All Items)
Mark as sent	w the Email.	▼ Mark as Sent	0			
Change Columns	Expand All	Collapse All	Export			
Drag a column hea	der here to group by	y that column	Recipient Addresses	Subject	Last firror	Trus
-			sanj 👍 🤉		Last Error	Trys
EmailID	Date Added	Date Sent	sanj 👍 🤉	Begins with	Last Error	
EmeilID	Date Added	Date Sent	sanj 👍 🤉		Last Error	
EmsiliD \$	Date Added	Date Sent	sanj <b>(</b> Sanjay©riskman.net	Begins with Contains	Last Error	

#### **Attach Document Settings**

To be able to attach a document to a notification/activity/ item you need to ensure you have specified the Attach Document Settings. These are accessible under the Administration -> Attach Document Settings page

		Attach Doc	ument Settin	gs	
1. Documents Upload Ty	pe (Security Type) - <mark>N</mark>	lote : This is a one time	e setting and cannot be	changed in future.	
Database (High)	RiskMan Databas	se			
	Other Database	0			
	O Different Server	· · · · · · · · · · · · · · · · · · ·			
🔵 File System (Low)					
2. Temporary Path					1
8. Max Document Size (I	мв)	1 3			
Save Upload Settings	4				

Specify where the document files will be stored Database (high security option) or File System (low security option). If you select

- **RiskMan Database:** The files will be stored in the RiskMan Database *This is the recommend option*
- Other Database: Files are stored in another sequel database but on the same server as the RiskMan database. If this option is selected enter the name of the database
- Different Server: Files are stored in another sequel database but on a different server to that of the RiskMan database. If this option is selected please contact RiskMan Support - <u>support@riskman.net.au</u>
- File System: Files are stored in folders in a central location. If this option is selected, enter the path of where the files will be stored.

**Note:** It is recommended that this be a folder on the RiskMan Web Server but not inside any Web Sites as the files could be exposed through the website

**Temporary Path:** All files uploaded or downloaded in an Internet environment must be saved to a temporary file location before being saved to the destination location. For this reason it is necessary to enter the path e.g. c:\Temp where these files will be stored temporarily - this path can be changed at any time

Output Size (MB): Specify the maximum size of the documents that can be attached to a notification/item/ activity - this file size can be changed at any time

(1): To save your settings, press Save Upload Settings

#### System Tools

The **Tools** options available under the *Administration -> Tools* menu provides other system related functions which can either be

• Accessible to your RiskMan Administrator; or

 Accessible via an authentication code provided by RiskMan Support and possibly only used by or in conjunction with RiskMan support

The Tools menu option is only available to users with the following **Administrative Permission** under the **General** tab

#### • Can modify Global Settings

As some Tools can only be used in conjunction with RiskMan Support; the contact details are support@riskman.net.au or +61 3 9686 0009

#### List Structure Editor

This option provides access to the Administration Lists that are normally hidden under the List & Codes Maintenance list.

This page is only accessible via an authentication code.

It allows RiskMan Support to make changes to your System's setup that are not accessible to RiskMan clients but are used in conjunction with requests from clients; for example:

- Audit Log Settings: Defines the logging of specified events in the RiskMan system. The logging of Assign and Unassign Manager is often enabled at customer sites
- LDAP Multiple sites: Defines multiple LDAP servers if required in an alliance, and when enabled users must select the server/domain they wish to use
- My Home Page Items: Defines all of the items which can be displayed on the Home Page
- Auto Post Incident Rules: Defines the conditions under which incidents should be automatically posted
- Auto Post Feedback Rules: Defines the conditions under which feedback should be automatically posted

**Note:** If you wish to know more about the Admin lists please contact RiskMan Support - support@riskman.net.au

#### Menu Editor

This option provides access to the RiskMan menus e.g. My Workspace, Management, Administration, Reports, Help

This page is only accessible via an authentication code

It allows RiskMan Support to modify, move or include additional menu items in your RiskMan e.g. Menu items that might point to your own user documentation

#### Data Tool

This option allows scripts to be run against your database and also to extract data from your database.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support

### Script Tool

This option allows extraction of data from specified tables in your database e.g. template information; datasets; lists; front page text.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support to extract specific data from your RiskMan database that may need to be updated into our respective RiskMan model site when enhancements have been requested; or copy data from your Training/Live database to your Live/Training database

#### <u>Audit Log</u>

The Audit Log allows you to view changes that have been made to specific parts of your RiskMan e.g. Assign a Manager, Unassign a Manager; Login Failed; Login Success; Account update to LDAP; Changes to labels on the Register Entry Forms and other events.

Auditing can be turned on or off with the assistance of RiskMan Support

Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of Audit Log entries* to set automatic purging once each respective record type reaches a certain age.

#### Example: List of items that are audited in RiskMan

#### To filter your Audit List

- Modify the date range (refer to the RiskMan List Page Configuration Guide)
- Select a specific Action from the list

						Audit Log	¢	ż
Drag a column header here to group by that column								
Date		User [	Action	i		Action Description		
	- 7							4
21 Apr 2017	14:18	Manager	Globa	I Setting ea	SR.	Change Global Setting 'ShowCompCustReportFooterUsemame' from '0' to '1'		
21 Apr 2017	14:21	Manager	Globa	Setting ea	in:	Change Global Setting 'ShowCompCustReportFooterUsername' from '1' to '1'		
21 Apr 2017 14:25 Manager Global Setting edit			25 Manager Global Setting edit Change Global Setting ThfoCentre_MaxWigdetGroup' from '10' to '4'					
21 Apr 2017	Apr 2017 14-44 Lauren Nanager Incident Default Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted					Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 2017	14:44	Lauren Nanager	Risk C	Default Wid	g	Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 2017	14:51	Lauren	Globa	I Setting ea	R	Change Global Setting 'InfoCentre_MaxWigdet' from '6' to '6'		
21 Apr 2017	15:11	Lauren	Globa	I Setting ea	in.	Change Global Setting 'DontDisplay/FieldsInReportsMask' from '********** to 'Do Not Have Permission To View'		
21 Apr 2017	15:16	Lauren	Globa	I Setting ea	iit.	Change Global Setting 'DontDisplayFieldsInReportsMask' from 'Do Not Have Permission To View' to 'xxxxxxxxxx'		
21 Apr 2017	15:52	Lauren	Globa	I Setting ea	52	Change Global Setting 'ReasonForLinking' from '0' to '1'		
21 Apr 2017	16:00	Lauren	Globa	Setting ea	in:	Change Global Setting 'TitleMandatoryPrefixSuffix' from 'None' to 'Prefix'		
21 Apr 2017	16:00	Lauren	Globa	I Setting ea	R	Change Global Setting 'TitleHandatoryPrefix' from " to ""		
21 Apr 2017	16:00	Lauren	Globa	I Setting ea	in.	Change Global Setting 'TitleMandatoryPrefix' from 'W' to '*'		
24 Apr 2017	11:26	Manager	Item	Form Load	ьd	Form loaded, Register=Incidents(Incident), Display ID=3573		
24 Apr 2017	11:41	Manager	Item	Form Load	ed .	Farm leaded, Register=Incidents(Incident), Display ID=3599		

Press enter to update the list

					Audit Log	0	4
	Drag a column header here to group by that column						
Date		User		Action 💌	Action Description		
21 Apr 2017 🔞	• 7		2	\$			
21 Apr 2017 14:1	18	Nanager		Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsername' from '0' to '1'		_
21 Apr 2017 14:2	21	Hanager		Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsemame' from '1' to '1'		
21 Apr 2017 14:2	15	Hanaper		Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdetGroup' from '10' to '4'		
21 Apr 2017 14:4	14	Lauren Manager		Incident Default	Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 2017 14:4	н	Lauren Manager		Risk Default Widg	Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted		
21 Apr 2017 14:5	51	Lauren		Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdet' from '6' to '6'		
21 Apr 2017 15:1	11	Lauren		Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from '********** to 'Do Not Have Permission To View'		
21 Apr 2017 15:3	16	Lauren		Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from 'Do Not Have Permission To View' to 'cococococo'		
21 Apr 2017 15:5	52	Lauren		Global Setting edit	Change Global Setting 'ReasonForLinking' from '0' to '1'		
21 Apr 2017 16:0	00	Lauren		Global Setting edit	Change Global Setting 'TibeHandatoryPrefixSuffix' from 'None' to 'Prefix'		
21 Apr 2017 16:0	0	Lauren		Global Setting edit	Change Global Setting 'TitleHandatoryPrefix' from " to "#'		
21 Apr 2017 16:0	0	Lauren		Global Setting edit	Change Global Setting 'TitleHandatoryPrefix' from '*' to '*'		

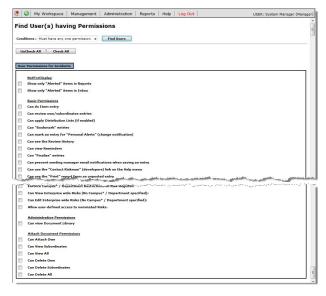
Example: List of all events for a specific date

#### Find User Tool

This tool allows you to locate all users who have a set of permissions on RiskMan e.g. you may want to know all the users who have access to the Incident Inbox or the Risk Reports

#### Navigate to Administration > Tools > Find User Tool

**Note:** This page has not been completely updated to reflect all the changes to the permissions so may not work for all permissions



#### To search for users with particular access to RiskMan

1. In the **Conditions** list select whether the users need to have one of the selected permissions or all the selected permissions



- 2. Check the respective user permission/s
- 3. Press Find Users
- A list of users matching the selected user permission/s will display

ind User(s) having Permise	ions	
() 5		
conditions : Must have any one permission 👻	Find Users	
	UserName	
	Beck, Sue (beck sue)	
	Hamilton, Cassandra (Cassandra)	
	CLO (CLO)	
	CLOTemplate Only (CLOTemplate Only)	
	Ohilon, Amritpal (Dhilon Amritpal)	
	eone anna (Leone Anna)	
	Cheetham, Lynn (Lynnc)	
	System Manager (Manager)	
	Miller, Julie (Niller Julie)	
	Lane, Nichelle (Mlane)	
	Risk Manager (Risk Manager)	
	Risk NanagerTemplate Only (Risk ManagerTemplate Only)	
	SuperUserTemplate Only (SuperUserTemplate Only)	
	Wetson, Flona (watson fiona)	

Example: List of Users who have access to the Feedback Inbox

#### Grant Admin Permissions

This option grants a user access to all the Administrative permissions where that user's Administrative permissions have been removed inadvertently; or remove any Specific/Restriction Details that have been set against an Administrative User e.g. Site/Location restrictions

Navigate to Administration > Tools > Grant Admin Tool

This page is only accessible via an authentication code.

It is used in conjunction with RiskMan Support

#### Email Log

Emails generated from RiskMan are stored in an Email Log.

(Refer to the RiskMan Email Log Guide)

The Email Log allows you to view sent and unsent emails via RiskMan to be able to identify issues. Email could be generated from Alerts, Delegation, Distribution Lists and Broadcast Emails as an example.

Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of email entries* to set automatic purging once each respective record type reaches a certain age.

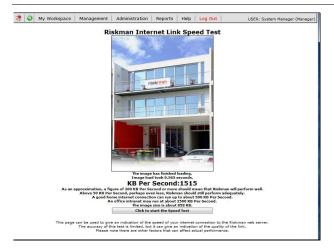
### Speed Test

This page tests the Internet speed to the RiskMan system you currently have open



Press the Click to Start the Speed Test button

## **CORPORTING REFERENCE GUIDE TO SYSTEM CONFIGURATION & TOOLS**



Details on acceptable speeds will appear under the speed of your Internet. If you have concerns relating to the speed of your Internet Explorer/Network contact your IT Dept

#### Email Test

This option allows you to test that emails are being sent from RiskMan

If you have mail setup on your RiskMan the following fields will be prefilled; Sender's Name; Senders Email Address; Reply-To Email Address; Mail Server; Port

🤣 🔾 My Workspace	Management	Administration	Reports	Help   Log Out	USER: System Manager (Manager
RiskMan Email Test	Fool				
Recipient's Name:					
Recipient's Email Address (To):					
CC:					
Subject:					
Body:				*	
Sender's Name:					
Sender's Email Address:					
Reply-To Email Address:					
Mail Server:					
Port:	25				
Mail Authentication:	None	-			
Username:					
Password:					

- 1. Fill in the **name** and **email address** of the **recipient** (you may want to enter your own details so you can check if the email was sent)
- 2. Enter an email subject and email body
- 3. A **username** and **password** maybe required before sending the email but in most cases this will not be required
- 4. Press Send Email

#### Text Editor Tool

This tool enables you to change the text on some of the pages on RiskMan. Examples include:

- Front Page text this can also be changed from Administration -> Configuration -> RiskMan Text Editor
- "Create New User Login" page

Create ne	w User Login				
Warning	If you have an existing WIDHS I	ogis but have forgotten your usernam permission and mana	and/or password please contact you ger/staff relationships are based upp	er VHIMS Support person. Do I on usernames.	IOT create another WIDHS logis as incident
Username					
Your Passy	vord				
Confirm Pa	ssword				
First Name					
Sumame					
Durname			Dendica	101	
YOUR Campus"(s)			Bendigo Box Hill East Melbourne Epworth	(E) •	
Your Organ	nisational Email Address				
Phone num	iber				
Your Positi	on				
Create th	e Account				Cancel
NOTES:					
NOTED	USERNAME	Is the name you will use t We recommend your net The Username must be	work login, if you have one.		
	PASSWORD		ed people may view your for ce to confirm you didn't mak		a first time.
	FIRST NAME	Is your first name.			
	SURNAME	Is your surname.			
	YOUR Campus*(s)		ou work. Hold CTRL and click		8.
	EMAIL		s, so you can be contacted		
	PHONE	Your office phone number			
	POSITION	Your position, which can a	nake it easier to find you.		

"User Login" section on the front page

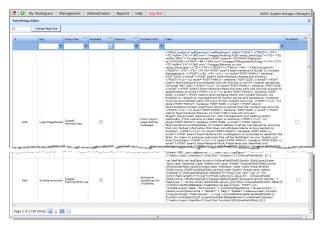
USER LOGIN	8
Username	
	-
Password	
Submit	

• "For New Users" section on the front page



#### To access the Text Editor Tool

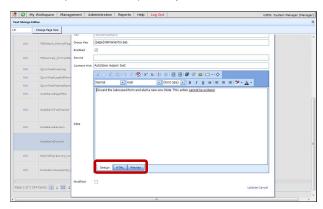
1. Select Administration -> Tools -> Text Editor Tool



Next to the text that you wish to change press the Edit button

	Change Page Size				
		rowy.	r new with we want w	1888	
ndn	10-actions_FormatPage	Group Key	{page}riskmanentry.asp		
		Enabled			
abo	Monumals_FormatPar	Source			
Gdk	QuickFostHeading	Content Hint	AutoSave reopen text		
édk	QuickPostLastiditikan		Discard the Autosaved form and start a new one (Note: This action <u>cannot be undone</u> )	^	
sta	QuickSostPostedNerry				
Gdk	AutoSavePageTitle				
oda	AutodeneTosPromot				
Ğdk	AutoGaveReopen	Data			
	AutoSereDiscerd				
60x	RockOGavasovpt_Inc				
üdit	PreDubristDavascript		Design HTML Preview		

- The text will be displayed in HTML mode by default.
   Press the **Design**" button at the bottom of the page
- 4. Modify the text and press **Update**



**Note:** If there are sections of your RiskMan that you would like text changed but you are unable to find the section in the Text editor Tool contact RiskMan support - <a href="mailto:support@riskman.net.au">support@riskman.net.au</a>

#### Recreate RiskMan Procedures

This page allows you to recreate certain SQL procedures and functions that need to be dynamically generated in the RiskMan system. If procedures need to be recreated you will be directed by RiskMan Support



It also allows you to turn on debugging which will show you the database field names that are used on the Register forms (*refer to example below*). This can be used by RiskMan Support to troubleshoot issues that may arise or when enhancements have been requested

	Submit	Incident Entry this form to record the incident. able to change the form once entered.	
DEBUG: Click to show	the 'Value' in lists.		
Who Was Affected?			
Incident Involved	ID: IncidentInvolved - maxlength Patient/Client	*255* Medical Record #	ID: MedicalRecordNo - maxlength="255"
	ID: FirstName - maxlength="255"		
	ID: Surname - maxlength="255"		
	ID: DateOfBirth -	Age	-
	ID: Sex - maxlength="50"	-	
	ID: Street - maxlength="150"		
	ID: Suburb - maxlength="100"		

#### **Classification Editor**

This tool is used by RiskMan Support & Clients to add, edit or delete classifications that are used in the newer style Classification Multiple Selectors *(refer to example below)*.

Save and Exit Cancel				Search	
Specialty List					
PECIALTY SET					
Anaesthetics Banatric Cardiac surgery Cardiac intervartional Cardiac intervartional Cardiac intervartional Cardiac Surgery BRT General surgery Oyneoclogy Oyneoclogy Oyneoclogy Ophatricology	() Display All	Emergency medicine	Display All	Medical	Otsplay All
Oral/Naxilofacis//Dental     Orthopaedics     Othopaedics     Othopaedics					
Orthopaedics     Orthopaedics     Other     Plastic surgery     Spinal     Urology     Vascular surgery	Display All	Obstetrics	Display All	Paediatric	Display All
Cothopaedics Cother Static surgery Satisal Urclogy Vescular surgery	Display All	Obstetrics Psychiatry		Paodiatric Radiology	Display All
Cothopsedics Cother Plastic surgery Spinel Urology	8		Display All		(8)
© othopsedia © the ■ Pathis propery Spini □ Unlogy ↓ Vasculer surgery Neonatal Pathology	Display All	Psychiatry Surgical / Procedural	Display All		· · ·

In most organisations the **Classification Editor** and **Quality Activity Classification Editor** available under the Administration menu, is used to maintain your Incident and Quality Activity Classifications respectively.

This page is only accessible via an authentication code

**Note:** If you are using the newer style Classification Multiple Selectors and you wish to be able to edit, delete or modify a classification please contact RiskMan support -<u>support@riskman.net.au</u>

Versio	n Name	Description	Has Been Applied
3.898	Feedback Field to Preserve-RoleId	Adding Role id in feedback as a field to preserve where rolename also is a field to preserve. Adding the Role id for the user's rolename selection. Deleting the Preserved Set of PFValues where role name exists but role id is null	No

#### Indicator Maintenance

This page accesses the queries behind the Indicator sets

This page is only accessible via an authentication code

It is used by RiskMan Support when trouble shooting Indicators

#### Code Maintenance for Large Lists

If your organisation experiences delays when opening up specific lists because they are large e.g. Site/Location list, an alternative list page to the List & Codes Maintenance is available - Code Maintenance for Large Lists.

This page contains all the same lists as the standard **List & Codes Maintenance** page but enables Administrators to manage these large lists more efficiently.

**Note:** Refer to the **RiskMan Managing Lists & Codes Guide** for more information. The permission to this menu item can be changed and the menu item itself can be moved to appear under or above the List & Codes Maintenance menu, by contacting RiskMan Support

#### Auto-Update List

This page displays the list of updates that have not been applied to your RiskMan system. These updates are fixes/changes that have been done by RiskMan that may affect your system. On logging onto RiskMan, a RiskMan Administrator would automatically see these updates. If they choose not to proceed with the updates, they will still be available to update at a later stage on this page



**Example:** The message a RiskMan Administrator receives if there is an update to RiskMan. If the user presses **OK** a list of new and old updates that have already been applied to that version will appear. This list can also be viewed from the Auto-Update page

#### To apply the updates manually

- 1. Select Tools -> Auto-Update List
- 2. Press the Apply Update button