#### Introduction

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

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

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

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

		Quality Activity   Risk   Feedba	LK			
		User Profile	s (General)			
elect User:	5096 Users found.	-	User Registry	Save User	New User	Delete User
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		Only Show Expired	Users:			
RiskMan Us	er Type Filter:					
		<ul> <li>Only Show Deleter</li> </ul>	Users:			
User Positic		- Only Show Delete	l Users: xpired Users in Search:			

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

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

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

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

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

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

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

#### Clients who have a User Licence

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

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



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

#### How do I create a New User?

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

In this guide, it will be assumed

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

#### Creating a User

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

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

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

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

#### General tab

The General User Profiles only contains the

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

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Login Details	2					
User Display Namer User Namer				user's position is: Man User Type is: [	Default (3) Reapply the above template permissio	65
Do you want to change Passwo Password Never Expires: Force Change Password: Email Address:	rd:  Last Changed: Never		Altern	ate Email Address:		
Phone Number: Profile Duration:	Expires On     Never Expires			Hobile Number: Start Page: 1	incident Entry 4	_
Current/Pending Delegation						_
No Restrictions in this area have an		s section are shared bet	ween all modules.)			
Entry/Update Restrictions	acility Restriction:			cation Restriction:		
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#### 2. Enter the user's details in the Login Details 2 section

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

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

User Display Name:	System Manager
User Name:	Manager
Password:	•••••

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

Login Datails	
User Display Name:	Lauren
User Name:	Lauren
Do you want to change Pas	sword: 🗌 Last Changed:
Password Never Expires:	
Force Change Password:	

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

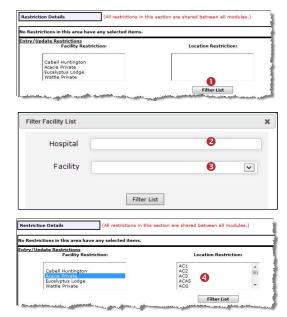
- Users can change their password if they want. However, if a user wants to change their password they cannot use any of their last 12 passwords. This change is not controlled by any settings and will be applied automatically.
- It is possible to add to the ability to prevent users from changing their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

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

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

#### To view the Location restrictions

- Click on the Filter List button **1** under the Location Restriction box
- In the pop-up window, select the Site 2 and press the Filter list 5 button
- The list of Locations will populate into the **Restriction Details**  section
- Highlight as required (Hold CTRL key if you wish to select more than one Location)



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

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

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

4. To save the user, press Save User 3

#### Assign a Register Specific Template for the New User

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

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

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

#### Incident tab

0

Click on the Incident tab 

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

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

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

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

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

 If the user has restrictions this section will be exposed. If you make any changes to these 8

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

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

#### Feedback Tab

Click on the Feedback tab 

 and the newly created user will be displayed

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

#### <u>Risk Tab</u>

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

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



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

General In	cident Qual	ity Activity	Risk	Feedback	
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Select Users New User 29 Users fo	wind.		User Regis	try Save User New	User Delete User
User Name Filter:			Rebuild 'Select Us	er' List Now	
RiskMan User Type Filteri			inly Show Users with no	permissions in this register:	
User Position Filter:		<b>v</b>			
User Created After Date: User Has Facility Restriction:			nclude users with no Per mly show active users in		
Login Details					
User Display Name:				r's position is:	V
User Name:			This user's RiskMan	User Type is: Default	ve template permissions
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- 5. **Restriction Details (s)**: If the user does not have any Restriction Details then this section will be collapsed
  - To expose the **Restriction Details** section click on the section click o
  - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
- Specific Restrictions <sup>(3)</sup>: This section will display the Register specific restrictions
  - Highlight the Entry/Update, Reporting and Journal Type Restrictions as required
  - Show Only "Alerted" Risk Items in Inbox: This option should <u>only</u> be checked if the user has the following Management Permission: Can Review Entries in Inbox (e.g. Risk/Quality Managers, Executives) and should only see Risks they have been alerted to
  - Show Only "Alerted" Risk Items in Reports: This option should only be checked if the user has access to the Risk Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on risks they have been alerted to
  - If you restrict the list of reports, the user <u>WILL</u>
     <u>NOT</u> have access to the Risk Register Custom
     Report Builder on the Risk Reports page to create,
     modify or delete Custom Report Layouts
- 7. To save the user, press Save User 📀

#### How do I modify an existing user?

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

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

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

## Modifications that need to be done under the specific Register tab

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

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

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

#### Searching for a User



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

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

### Modifications: Template Changes & Specific Restrictions

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

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

- 3. Modify the Specific Restrictions <sup>6</sup> as required
- 4. Press Save User 4

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		User Prof	iles (Incident)	4	
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User Position Filter:		¥			
User Created After Dates			Include users with no Per		
User Has Facility Restriction	82	v (	Only show active users in	search:	
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User Display Name:				r's position is:	×
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No Restrictions in this area hav	e any selected items.				۲
Specific Restrictions	(Restrictions in thi	s section are specific to the n	anister V		
Entry/Update Restrictions	Incident Involved Restriction				
Patient, Staff M					
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Show only "Alerted" In	cident items in Reports. 🧐 Incident Involved Restriction				
Client Patient	Client	^			
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Example: Modifying a User under the Incident Register User Profile

### **Modifications: Login Details & Restriction Details**

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

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

- 3. Modify the **Restrictions Details 6** as required
- 4. Press Save User ④

0							
General	Incident	Quality	y Activity	Risk	< Fee	dback	
		User Prof	iles (General)				
Select Users New User	×		User Registr			v User Delete I	lser
34 Users	found.						
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User Has Facility Restriction		· · ·	Exclude Deleted/Expired U	isers from sea	rchi		
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mail Address:			Alternate En	hail Address: bile Number:			-
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#### Modifications: Adding or Modifying a Delegate

#### for a User

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

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

#### To assign a delegate

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

#### 6. Press Save 6

elect User: Hayden, a 1 Users fo		•	0	User Registry	Save User	New User Delete User	
User Name Filter: RiskMan User Type Fil User Position Filter:		<ul> <li>Manage Deleg</li> <li>Add Delegate</li> </ul>	ates Webpage Dialog Manage Delo	egates fo	r Hayden, Anne (	ahayden)	
User Created After Da User Has Campus <sup>4</sup> Re Login Details		Edit or select Delegate Start Date End Date	a staff member as your leone anna (Leone Anna) Tuesday, 22 May 2012 Thursday, 31 May 2012	Delegate • • • •	Save 5		
lser Display Name: Iser Name: 'assword:	Hayden, Ann Format as (L ahayden	Delegate's Userni			Delegation start date	Delegation end date	
mail Address: Phone Number: Profile Duration:	enne@riskm © Expires C @ Never Ex						
Current/Pending Dele Edit Delegation					s.aspx? 😪 Local intranet   Prote		

#### To modify/delete an existing delegate

- 1. Locate the User under any Register or the General tab
- 2. Press the Edit Delegation 0 button
- 3. Double click the **Delegate's Name** 2 in the list
- If you wish to modify the details of the delegate, make any respective changes and press Update 6
- 5. If you wish to delete the delegation press **Delete 4**

			User Profile:	s (General)			
elect User: Hayden, 1 Users f	Anne (ahayden) ound.	•		User Registry	Save User	New User	Delete User
User Name Filter:	hayde	👔 Manage Delega	es Webpage Dialog				
RiskMan User Type Fi User Position Filter: User Created After D		Add Delegate	Manage D	elegates fo	r Hayden, Ann	e (ahayden	)
User Has Campus <sup>®</sup> Re	estriction:	Edit or select	a staff member as y				
		Delegate	leone anna (Leone Ann Tuesday, 22 May 2012	(a) •	8	•	
Login Details		Start Date	Tuesday, 22 May 2012 Thursday, 31 May 2012	~	B	Delete	
User Display Namei	Hayden, Ann Format as (L ahayden	Please double click	to edit.				
assword:		Delegate's Usernar	Delegate'	s Name	Delegation start date	Delegatio	on end date
Email Address	anne@riskm	Leone Anna	2 leone anr	a	22 May 2012	31 May 2	012
Phone Number:			-				
Profile Duration:	C Expires (						
	Never Ex						
Current/Pending Dele	rgation						
Edit Delegation							
Has Delegated Author							

#### Modifications: Activate a User under a Register

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

All users will be **active** under the **General & Feedback** tabs

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

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

General Incident Quality Activi	ty Risk Feedback				
Contrar Includence Quality Action	c) RISK FOCOUNT				
	User Pro	files (Risk)			
Select User:		User Registry	Save User	New User	Delete User
1066 Users Found.		Cash Regardy		Hew Case	
liver Name Filter:		how Users with no permissions i		tebuild 'Select User	
	O Only S	how Users with no permissions i	n this register:	Cebuild Select User	r'List Now
RiskNan User Type Filter:	*				
User Position Filter:					
User Created After Date:	🔿 Includ	e users with no Permissions in 5	earch:		
User Has Organisation* Restriction:	a Only a	how active users in search:			

- 2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
  - Enter the user's first or last name in the User
     Name Filter Ø field
  - Check the "Only Show Users with no permissions in this register" <sup>(6)</sup> option
  - Press the Rebuild Select User List Now 4 button

General Incident	Quality Activity	Risk F	eedback				
		Us	er Profiles (R	isk)			
Select Useri 4 Users found.	•			User Registry	Save User	New User	Delete User
User Name Filter:	david 💋		Only Show Users w	ith no permission	his register:	Rebuild 'Select Use	e' List Now 4
RiskMan User Type Filter:		-		-			· · · · ·
User Position Filter:		-					
Iser Created After Date:			🔿 Include users with	no Permissions in Se	arch:		
User Has Organisation* Restrictio			Only show active a	nerr in search:			

- 3. Select the user from the Select User <sup>(5)</sup> list
- 4. Press Save User 6
  - A message will display to inform you that the User is now activated

		Hear D	rofiles (Risk)	-
	<u> </u>	User P	ionies (Risk)	6
Gelect Users Lauren Haupt (hau 29 User			User Registry Ser	re User New User Delete User
User Name Filteri		10	Rebuild 'Select User' List Now	
RiskMan User Type Filter:		Y	Only Show Users with no permissions in	this register:
User Position Filter:		×		
User Created After Date:			Include users with no Permissions in Se	arch:
Uner Has Facility Restriction:		× (	Only show active users in search:	
Login Oxtails				
User Display Name:	Lauren Haupt		This user's position is:	Emergency Department
User Name:	lhaupt		This user's RiskMan User Type is:	Superuser
				Reapply the above template permissions
Password Never Expires:	vrd: 🗌 Levt Changed: 🗹			
Password Never Expires: Force Change Password:	2			
Password Never Expires: Force Change Password: Email Address:			Alternate Email Address:	[
Password Never Expires: Force Change Password: Email Address: Phone Number:	Isuren@cpl.com.au		Nobile Number:	
Password Never Expires: Force Change Password: Email Address: Phone Number:			Hobile Number: Start Page:	My Homa Page
Password Never Expires: Force Change Password: Email Address: Phone Number:	Isuren@cpl.com.au		Hobile Number: Start Page:	My Home Page 18 Juli 2010 08139128
Password Never Expires: Force Change Password: Email Address: Phone Number: Profile Duration:			Hobile Number: Start Page:	
Do you want to change Pasce Password Never Expires: Parce Change Password: Email Address: Phone Number: Profile Duration: Current/Pending Delegation			Hobile Number: Start Page:	

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

#### How do I delete a user?

Users can ONLY be deleted from the General tab

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

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

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

#### To de-activate a user from a Register

- Click on the specific **Register 1** tab e.g. Risk, Incident, Quality
- 2. Locate the user. Either
  - Select the user from the Select User 2 list; or
  - Enter filter criteria in one of the filter fields 

     and
     Press "Rebuild 'Select User' List Now" ②. Select
     the user from the Select User ② list
- 3. Press Delete User 6
- 4. A **message (**) will display to let you know that this user has been deleted from this Register only.

General Incident Q	uality Activity 📔 Risk	Feedback				
	O Updates to	User Profiles ( user David Binn		aved.		6
elect User: Binns. David (David Binn 15 Users found.	a) 🛃 🔹		User Registry	Save User	New User	Delete User
ser Name Filter: iskHan User Type Filter: ser Position Filter: ser Created After Date: ser Has Organisation* Restriction:	david	• • • Include users •	rs with no permissions with no Permissions in S ve users in search:		Rebuild 'Select Use	er' List Now
ogin Details ser Display Name: Binns, Davi	4			iis user's position is:		

General Incident Qu	ality Activity   Risk   F	Feedback	
	Us	ser Profiles (Risk)	
The User Brofile 'Day	id Binne' for register I	Risk has been marked as deleted (	not physically deleted)
The User Prome Day			not physically deleted),
Select Useri	and can t	be restored if necessary. 6	New User Delete User
14 Users found.		( See Report ) See One	inter oper
	david	Only Show Users with no permissions in this register	Rebuild 'Select User' List Now
lices Name Effer			Rebuild Select Oper Eachow
	und .		
RiskMan User Type Filter:			
RiskMan User Type Filter: User Position Filter:			
User Name Filters RiskMan User Type Filters User Position Filters User Created After Dates User Has Organisation® Restrictions			

#### To delete a user from RiskMan

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

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

	User Profiles (General)	6
Bielect Userr Binns, David (David Binns) 18 Users found.	User Registry Ser	we User New User Delete User
User Name Filter: David	4 Rebui	ild 'Select User' List Now
RiskMan User Type Filter:	<ul> <li>Only Show Expired Users:</li> </ul>	
User Position Filter:	<ul> <li>Only Show Deleted Users:</li> </ul>	
User Created After Date:	() Include Deleted/Expired Users in Search:	
User Has Campus* Restriction:	<ul> <li>Exclude Deleted/Expired Users from search:</li> </ul>	

- 2. Locate the user. Either
  - Select the user from the Select User 2 list; or
  - Enter filter criteria in one of the filter fields 

     and
     Press "Rebuild 'Select User' List Now" 

     Select the user from the Select User
- 3. Press Delete User 6

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

General Incident	Quality Activity Ris	k Feedback				
		Jser Profiles (Ge	neral)			
		file 'David Binns'		alatad		
Select User:	The Oser Pro	The David Dinns	User Registry	Save User	New User	Delete User
17 Users found.						
User Name Filter	David			Rebuild 'Select Us	er' List Now	
RiskMan User Type Filter:		Only Show Expired Users				
User Position Filter:	-	Only Show Deleted User				
User Created After Date:		O Include Deleted/Expired	Users in Search:			
User Has Campus* Restriction	-	Exclude Deleted/Expired	Users from search:			

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

General Incident	Ouality Activity	/ Risk Feedback			
	Quality Accivity				
		User Profiles (	General)		
	The U	ser Profile 'anne' has	recorde in Pi	Man	
In order not to los		record, it has been i			veically deleted) an
th order not to los	e the historical			eren (nor bui	ysically deleted), and
alact lines:		can be restored if			1
ielect User: 17 Users found.	•	can be restored if	User Registry	Save User	New User Delete User
17 Users found.		can be restored if			
17 Users found.	*	can be restored if		Save User	
17 Users found.		can be restored if	User Registry		
17 Users found. User Name Filter:			User Registry		
17 Users found. User Name Filter: RiskMan User Type Filter:		Only Show Expired U     Only Show Deleted t	User Registry		

#### How do I restore a deleted user?

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

#### To restore a user that was flagged as deleted from RiskMan

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

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

General Incident Ouality A	ctivity Risk Feedback				
and a second sec					
	User Profiles (Gene	ral)			
elect User: • 4		User Registry	Save User	New User	Delete User
acce (anne)					
User Name Filter:		B	Rebuild 'Select Us	er' List Now	
RiskMan User Type Filter:	Only Show Expired Users:				
User Position Filter	- Only Show Deleted Users	2			
User Created After Date:	Include Deleted/Expired Use	rs in Search:			
User Nas Campus <sup>®</sup> Restriction:	• C Exclude Deleted/Expired Use	irs from search:			

#### 4. Press the Undelete User <sup>6</sup> button

General Incident Qua	lity Activity 🍸 Risk 🍸 Feedback	
	User Profiles (General)	G
elect User: anne (anne) + 1 Users found.		User Registry New User Undelete User
Jser Name Filteri		Rebuild 'Select User' List Now
liskMan User Type Filter:	<ul> <li>Only Show Expired Users:</li> </ul>	
Jaer Position Filter:	<ul> <li>Only Show Deleted Users:</li> </ul>	
Iser Created After Date:	Include Deleted/Expired Users in Search	eh:
Jeer Has Campus <sup>+</sup> Restriction:	O Exclude Deleted/Expired Users from se	earch:

- The User is now restored <sup>6</sup> under the General & Feedback tabs
  - If there are no changes to the user's profile, it will not be necessary to press the Save User button
  - If you wish to make changes to the user's profile, modify as required and press Save User
- Repeat steps 2 5 under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

1	Undelet	User Registry	Save User	New User	Delete User
1					
<ul> <li>Only Sho</li> <li>Include I</li> </ul>		ii I Users in Search:	Rebuild 'Select U	ser' List Now	
	O Include I	<ul> <li>Include Deleted/Expired</li> <li>Exclude Deleted/Expired</li> </ul>	Include Deleted/Expired Users in Search:     Exclude Deleted/Expired Users from search:	Exclude Dakted/Expired Users in Search     Exclude Dakted/Expired Users from search     This user's position is     This user's position is	C Include Deleted/Expired Users in Search

#### To reactivate a user under a specific Register

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

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

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

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

The label of a Field or Section Name and the background

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

Who Was Affected?	
6Incident Involved	Entry Required 👻
First Name	Entry Required 👻
Surname	Entry Required 👻

Example: Fields on the Incident Entry form

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

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

General Incident Quality Acti	ivity Risk Feedback				
General Incident Quanty Act	vity NSK Peeuback				
	User Profile:	s (Incident)			
Select Useri Haydon, Anno (shaydon) 2	-	User Registry	Save User	New User	Delete User
User Name Filters	Only Sh	ow Users with no permissions i	n this register: 🔼	ebuild 'Select User'	List Now
RiskMan User Type Filter:	*				
User Position Filter	•				
User Created After Date:	🔘 Include	users with no Permissions in S	earch:		
User Has Organisation* Restriction:	S 0.1.1.	w active users in search:			

#### To modify a field label

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

Summar	γ <mark>0</mark>			Entry Required	l
Details				Optional Entry	
dit Field Det	ail				
Entry					
Title 🔞	Details	B		×	¢
Report					_
Title 🔞	Details	2			
	Display 🔞 🔽	Condition 🕢	Group 🧑		
Alert					_
Title 🕜	Details	4			
	Display 🕜 🖌	Condition 🕜	$\checkmark$		
Advanced	0				
Post Cell 🧑	<img alt="Che&lt;/td&gt;&lt;td&gt;ck Spelling" onclick="parent.fnSp&lt;/td&gt;&lt;td&gt;5&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Script 🕢&lt;/td&gt;&lt;td&gt;onfocus=" pare<="" src="in&lt;/td&gt;&lt;td&gt;nages/spellcheck.g&lt;/td&gt;&lt;td&gt;f" td=""/> <td>nt.fnPreSpellCheck</td> <td>:(this);"</td> <td></td> <td>2</td>	nt.fnPreSpellCheck	:(this);"		2
	ld 🕡		Obj Class 🧑		Ī
	TD Class 🔞		TR Class 🗑		ľ

- 2. Enter the label in the **New Title Text** <sup>(2)</sup> field (*this is the field on the respective Register form*)
- The new title should be reflective in the Reports and Alerts, so modify the New Reporting Title <sup>(6)</sup> and Alert Title <sup>(2)</sup> fields accordingly
- 4. If your Entry form has more than one label with the same name, ensure the labels for the Alert Title and Report Title are such that users are able to distinguish which Entry form label the field is referring to (refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)

					Hide Key Personnel Se	ctio
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Exampl	l <b>e:</b> "Notify of	<sup>F</sup> Associated	Incidents"	' referrin	g to th	
Accoun	table Execut	ive on the R	isk Entry f	orm		

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

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

Entry		
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	TD Class 🕢 TR Class 🕢	î

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

#### Global Settings = Site where Incident Occurred

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

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

#### To modify a Section Title/Colour or Background Colour

1. Click on the *M* icon **0** next to the Section Title

Al Dates 🚺	
Admission Date	Dont Display
La Incident Date	Entry Required 👻
<b>ANotification Date</b>	Dont Display 🗸 🗸
Date Closed	Dont Display

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

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

Section -					
Title 🔞	GS_Date	sSectionName	2		×
	Fill 🔞 🔵	#997788	Text 🔞 🤇	#FFFFFF	$\supset$
		ß		4	
				SAVE	CANCEL

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

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

4. Press Save when complete

Admission Date Admission Date Incident Date	
/i Admission Date	Dont Display
lIncident Date	Entry Required
Notification Date	Dont Display
Cosed	Dont Display

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

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

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

#### To access the User Registry page either

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

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	rden, Anne (ahayden)			User Registry	Save User	New User	Delete User
	8 Users found. v displaying first 500 use	9 9					
User Name Filte	11				Rebuild 'Select	User' List Now	
User Name Filte RickMan User T			Only Show Expired Use		Rebuild 'Select !	User' List Now	
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RiskMan User T	ype Filter: Iter:			rs:	Rebuild 'Select	Jser' List Now	

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

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#### **Display Option Definitions**

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

#### <u>User List</u>

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

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

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

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

#### Suggested Groupings for your User Profile List

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

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

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**Example:** Users grouped by their assigned **General Template** 

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**Example:** Users grouped by their assigned **Feedback Template**.

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

1	Email Domain				
	🙎 User Name				
	9				
	Medibank				
	RiskMan User				
	Line Manager				
	Manager				
Ξ	domain: @cpl,com.au				
	Ihaupt				
Ξ	domain: @riskman.net				
	lauraf				
0	domain: @riskman.net.au				
	Anne Hayden				
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•	domain: @softwaredesign.com.au				
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3. **Display Name** – Checks to see if a user has more than one logon in RiskMan

	👶 User Name	Employment Role						
	♥	\$						
-	User Display Name: Anne Hayden							
	Anne Hayden							
	Trainer	Acting Charge Nurse						
-	User Display Name: Arti Nazareth							
	Trainee 8	Acting Charge Nurse						
-	User Display Name: Default User							
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	Scott Esler							
•	User Display Name: Executive							
	Executive							
-	User Display Name: Faulkner, Laura							
	lauraf	Priest						
٥	User Display Name: Fernandez, Brett							
	Brett	Doctor - Consultant						

### How do I assign staff to Managers?

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