

## Introduction

This reference guide is aimed at users who are able to administer and modify Indicators in RiskMan.

## What are Indicators?

RiskMan provides high-level monitoring using Indicator Sets – groups of Key Performance Indicators, built over any component of the RiskMan data set.

Typical Indicators may include such items as:

- OH&S Indicators, tracking areas such as rates of lost time Injuries, or specific counts, such as incidence of back injuries, needle-sticks, etc.
- Clinical Indicators, such as falls-related data
- Consumer Feedback performance indicators, such as the average time taken to close complaints

Users are also able to compare data to external factors - e.g. number of occupied bed days per month per site - provided that the information has been added to the Factors in the Analyser (*see Analyser guide*)

Individual Indicators can be configured to display “traffic lights”, highlighting tolerance limits – green for acceptable, amber for concern, and red for unacceptable.

Indicator sets can be restricted to be accessible to specific users, such as a CEO, or a nominated group of users.

There is no ‘default’ indicator set delivered with your system, as they need to be developed based on both the differing requirements and system configuration of every RiskMan client.

*If you wish to develop Indicators for your system, please contact RiskMan International Pty Ltd by email: [support@riskman.net.au](mailto:support@riskman.net.au) or by phone: +61 3 9686 0009. A quote will be provided based on your request*

## Which user permissions do I need to be able to use Indicators?

There are **three** permissions which allow a user to administer Indicators, located under the **General** tab of User Templates/Profiles:

- **Viewing Permissions:** Can view indicator Set
- **Reporting Permissions:** Can create Indicator Set
- **Administrative Permissions:** Can maintain all Indicator Sets (manage)

The following matrix outlines what each combination of permissions entails when granted to a User (for clarity, we have included the baseline permission “Can view Indicators”):

Action Description	Combination of Permissions			
	View	View & Create	View & Maint.	View, Create, Maint.
Can see the Indicators page under the Reports menu and see Indicator sets shared to them	✓	✓	✓	✓
Can add new Indicators in a Set to which they have permission	✓	✓	✓	✓
Can modify, clone and delete Indicators in a Set to which they have permission	✓	✓	✓	✓
Can create a new Indicator Set, and create, modify and delete Indicators within it	✗	✓	✓	✓
Can share and delete an Indicator Set which they have created	✗	✓	✓	✓
Can share and delete an Indicator Set which has been shared to them	✗	✓	✓	✓
Can move an Indicator Set to another Indicator Group	✗	✓	✓	✓
Can add new and modify existing Indicator Groups	✗	✗	✓	✓
Can see all Indicator Groups, even those with Sets to which they do not have permission	✗	✗	✓	✓

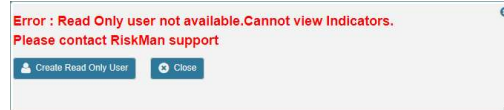
### LEGEND:

- ✗ - Not Permitted
- ✓ - Permitted
- ✓ - Permitted only if the user has been granted “Manage” access to the Indicator Set

## Before you can start working with Indicators

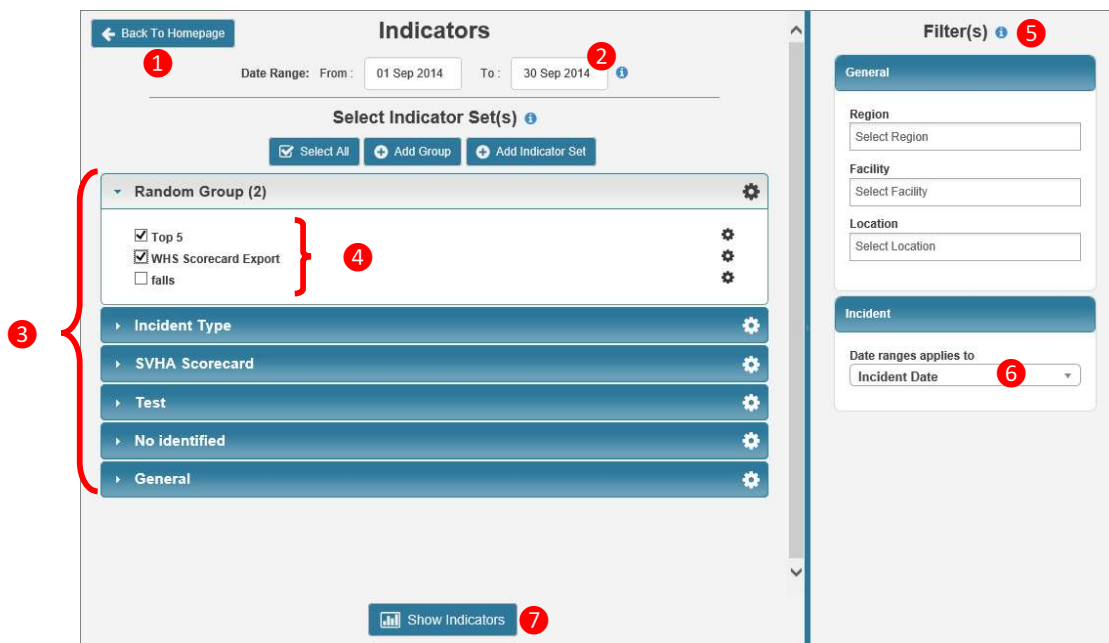
The code that underpins Indicators directly queries your database, and for this reason, RiskMan needs to ensure that these queries are executed in the most secure way possible. To achieve this, a special “read-only” user must be created within your RiskMan database to execute the queries for each indicator.

If you try to run an Indicator set without having created the Read Only User, you will see the following error message:



You will likely require the assistance of your IT Department in order to create the Read Only user. When you click on the **Create Read Only User** button, instructions will be displayed which can be followed by an authorised person in your IT Department. Please do not hesitate to contact RiskMan Support should you have any questions about this process.

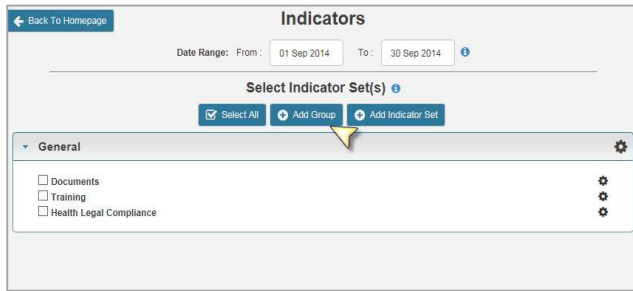
## Overview of the main Indicators page



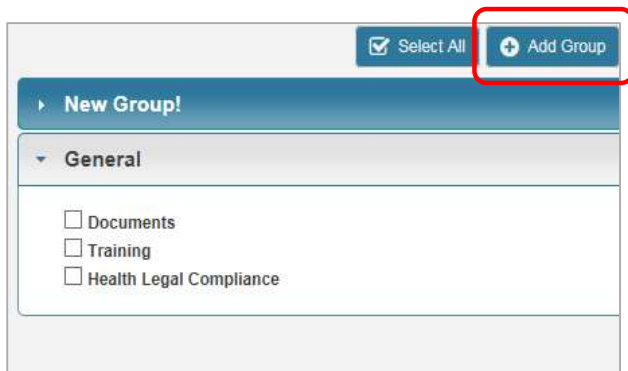
1. **Back to Homepage** – Click to exit Indicators and return to the RiskMan homepage
2. **Date Range** – Enter the date range you wish to analyse. This can be done by either typing the date in DD/MM/YY format, or selecting the required dates from the drop down boxes.
3. **Indicator Groups** – Indicator sets can be organised into logical groupings. Click on an individual group name to view the indicator sets within that group. At the end of each group is a cog icon - - which can be clicked to edit the properties of that group (see *Group Properties* on page 4)
4. **Indicator Set** – Each indicator set is listed under its relevant group. At the end of each set is a cog icon - - which can be clicked to edit the properties of that set (see *Set Properties* on page 4).
5. **Filters** – These allow the user to apply optional filters at run-time. The filters displayed are specific to the indicator set(s) chosen.
6. **Date ranges applies to** – The user is able to stipulate which date from the form the date range (point 2, above) will be based on. For example, you may have a reason to base your report on the Date Entered, vs Incident Date, vs Date Notified.
7. **Show Indicators** – After the desired indicator set have been selected and any necessary filters have been applied, click on the Show Indicators button to view results

**Grouping Indicator Sets**


As some clients have many sets of indicators, RiskMan allows the user to group sets together into arbitrary logical groupings. An indicator set can be added to an existing group or a new group can be created first and then additional indicator sets added.

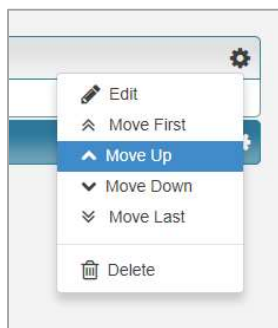


In order to add a new group, simply click on the **Add Group** button. The new group will then be visible, but is empty. To subsequently add indicator sets to the group, click on **Add Indicator Set**.



**Group Properties**

At the end of each group is a cog icon -  - which can be clicked to edit the properties of that group



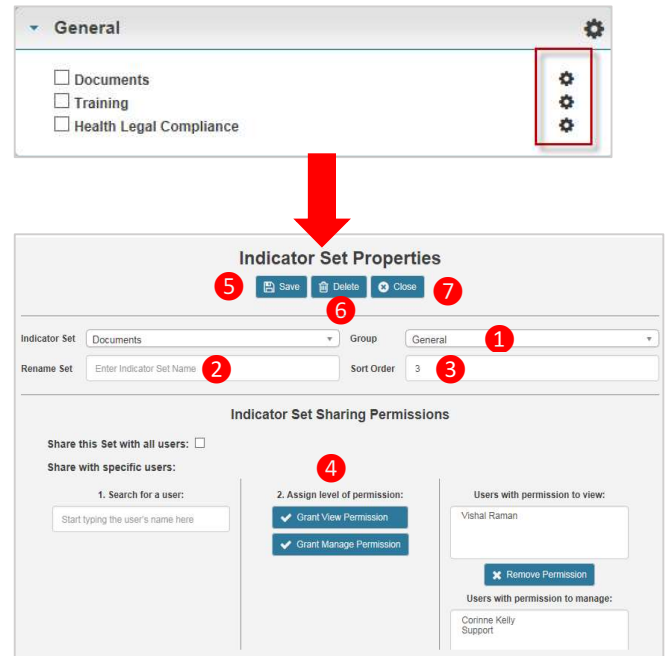
**Edit Name** - enables the user to edit the name of the group.

**Move Up / Down / First / Last** - allows the group to be moved to a different position on the screen.

**Delete** - allows the group to be deleted. This can only be activated if the group is **empty**. If the group contains any indicator sets, then each of these must be deleted individually or moved to another group before the group itself can be deleted.

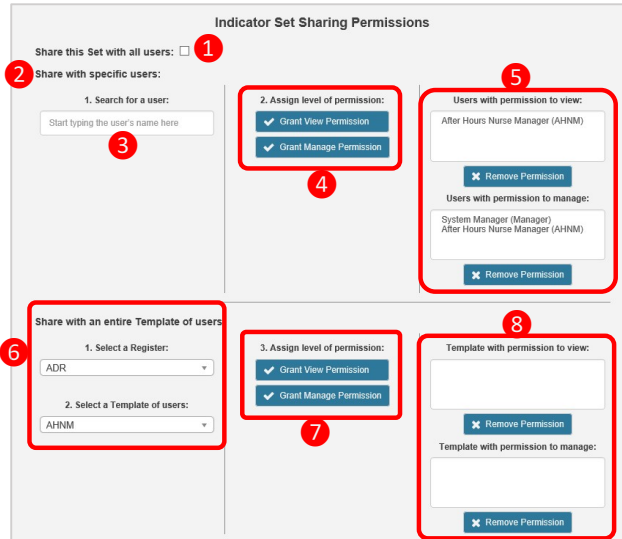
**Indicator Set Properties**

Each indicator set within a group contains its own individual properties.



1. **Group** – This allows the user to move an indicator set from one group to another
2. **Rename Set** – Allows the user to rename the indicator set
3. **Sort Order** – Allows the user to change the order in which this indicator set appears within the group
4. **Sharing Permissions** – Allows the user to assign access to an indicator set with other specific users or a template of users. *On the following page is a diagram showing Indicator Set Sharing permissions in more detail.*
5. **Save** – Saves current settings and takes the user back to the main screen
6. **Delete** – Deletes this set. This cannot be undone, and also removes the set from all users with whom it has been shared.
7. **Close** – Discards any modifications and returns to previous screen. The user will not be notified that any changes they have not saved will be lost.

**Indicator Set Sharing Permissions**



**1 Share this Set with all users** – Check this box to grant permission for every user in the system to view this indicator set (providing these users have permission to view the Indicators page in the first place). The **Users with permission to view** button and list are now redundant and thus will no longer be visible to the user.

**2 Share with specific users** – If **Share this Set with all Users** is not ticked, the user can instead share this indicator set with a specific user or users:

- **Search for a User** **3** Search for a specific user using their name and matching profiles that correlate with this name will appear. Click desired user name.
- **Assign level of permission** **4** To grant the user permission to view the indicator set only, click on **Grant View Permission**. To grant the user permission to manage and make changes to the indicator set, click on **Grant Manage Permission**.
- **Users with permission to view / manage** **5** Users with permission to view the indicator set will appear in the **Users with permission to view** box. Users with permission to manage the indicator set will appear in the **Users with permission to manage** box. To remove a user from viewing or managing an indicator set, highlight the name to be removed then click on the respective **Remove Permission** button. Hold the CTRL key to select multiple users.

**6 Share with an entire Template of users** - To share an indicator set with a template of users:

- Select a **Register** from the drop down list. Once the Register has been selected, the respective **Templates** from that Register appear in the second drop down list. Select the desired Template of users.

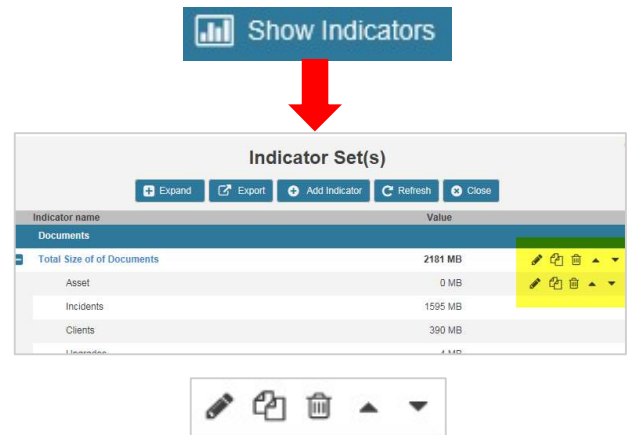
- **Assign level of permission** **7** To grant the template of users permission to view the indicator set only, click on **Grant View Permission**. To grant the template of users permission to manage and make changes to the indicator set, click on **Grant Manage Permission**.
- **Template with permission to view/manage** **8** Templates of users with permission to view the indicator set will appear in the **Templates with permission to view** box. Templates of users with permission to manage the indicator set will appear in the **Templates with permission to manage** box. To remove a Template of users from viewing or managing an indicator set, highlight the Template to be removed then click on the respective **Remove Permission** button. Hold the CTRL key to select multiple Templates.

**Remember to save any changes that have been made by clicking the Save button at the top of the page:**



**Properties of Individual Indicators**

After indicator set(s) have been selected, click on **Show Indicators** and the Indicator Set(s) screen will appear, allowing the user to edit properties of any individual indicators.



**Edit** - Allows the user to modify the properties of each individual indicator (see Indicators Management section)

**Clone** - Makes a duplicate of this indicator. This can be useful if the user wants to make several versions of the one indicator with slight modifications.



**Delete** – Deletes the indicator. This cannot be undone.



**Move Up/Down** – Moves the indicator up or down within the set

## Indicators Management

Indicators management allows the user to edit properties of an individual indicator. Click on the pen icon to enter indicators management.



The first part of the screen appears as follows:

The screenshot shows the 'Indicators Management' form. Callout 1 points to the 'Indicator Name' field containing '3.1 Total Patient Incidents'. Callout 2 points to the 'Parent' dropdown menu set to 'Base'. Callout 3 points to the 'Bold' checkbox. Callout 4 points to the 'Indicator Set' dropdown menu set to 'Clinical Indicators'. Callout 5 points to the SQL editor area containing the query: 'Select count(\*) from Claims where 1=1 (Date:Incidents) (Field:Site:General)'. Callout 6 points to the 'SQL Keyword List' button.

**1 Indicator Name** – The name of the indicator can be modified here.

**2 Parent** – The user can select another indicator within the set to be the 'parent' of this indicator. If a parent indicator is not needed, select 'base'. If an indicator is a 'parent' the **+** icon will appear next to it. Click on this icon to expand and view all the 'child' indicators beneath it:

The screenshot shows a tree view of indicators. The parent indicator '3.2 Serious Outcome Incidents (%)' is expanded, showing its child indicator '3.1 Total Patient Incidents'.

**3 Bold** – If this box is ticked, the name of the Indicator will appear in bold

**4 Indicator Set** – The name of the Indicator Set to which this indicator belongs.

**5 Numerator / Denominator** – Contain the SQL statements which calculate indicator values. *For more information, please refer to the 'Writing Indicators' guide, available soon.*

**6 SQL Keyword List** – *Please refer to the 'Writing Indicators' guide, available soon.*

The second part of the screen looks as follows:

The screenshot shows the 'Indicator Settings' and 'Supporting Statements' sections. Callout 1 points to the 'Format' dropdown. Callout 2 points to the 'Display Suffix' dropdown. Callout 3 points to the 'Green Level' input field. Callout 4 points to the 'Red Level' input field. Callout 5 points to the 'Target Frame' dropdown. Callout 6 points to the 'URL' input field. Callout 7 points to the 'Supporting Statements' table with columns for Definition, Rationale, and Comments.

**1 Format** – Controls the format in which the value is displayed. For example, DD/MM/YYYY will display the date, 0 will show a whole number, 0.0 will show a number rounded to one decimal place etc. The maximum number of characters allowed is 25.

**2 Display Suffix** – This is the unit of measurement that is displayed in the value column after the number. This can be anything the user wants; however, the maximum number of characters allowed is 20. Examples may be kilos, kilometres, number of bed days etc.

**3 Green Level** – The maximum number which is considered an acceptable value for this indicator. If the value returned is up to or equal to this number, the 'green' indicator is displayed. For example, if the maximum number of acceptable incidents is 20, the green indicator will show for any numerical value from 0 to 20.

**4 Red Level** – The minimum number that is considered too high a value for this indicator. If the value returned is equal to or greater than this number, the 'red' indicator is displayed. For example, if over 30 bed days is considered excessive, the red indicator will show for any numerical value 30 or over.

**Note:** For any values between green and red, the amber indicator is displayed. The indicators appear like this:

The screenshot shows a list of indicators with their values and status indicators. A red box highlights the first three rows: '989' with a red indicator, '3.34%' with a green indicator, and '386' with a red indicator. Each row also has icons for edit, copy, delete, and move up/down.

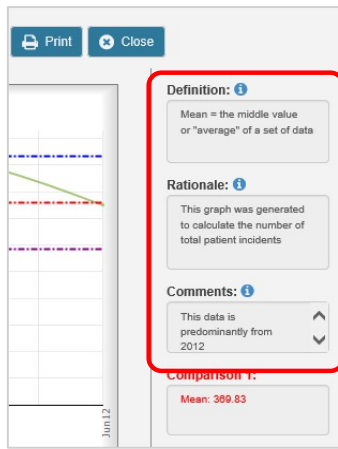
**5 Target Frame** – If there is a URL link, the target frame is where this link will be opened. If **Target Frame** is empty, any encompassed link will be opened in the same window as Riskman. If "iframe1" is written under **Target Frame** then any link will be opened in a separate window.

6 **URL** – Enables the user to include a relevant link for a particular indicator that will direct users to either another Riskman page or an external site. Once a link is included, the indicator name will appear in blue:

[New Incidents \(All\)](#)

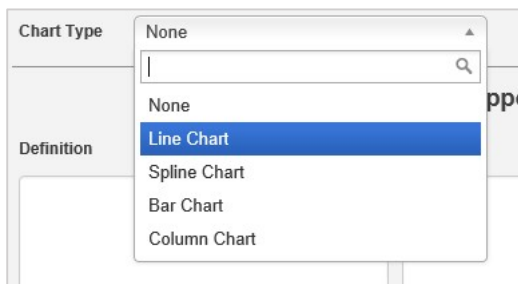
To access the attached link, click on the indicator name.

7 **Supporting Statements** – Text fields where additional information can be added around the definition, rationale and general comments. This information appears on the side of the screen after a graph has been generated for an individual indicator:

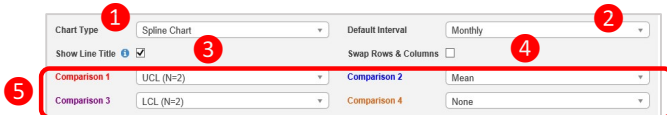


**Chart Options**

Under Indicator Settings, there is also the option to generate a chart. Start by selecting the type of chart you want under the **Chart Type** option.



Further options are shown when a chart type is selected:



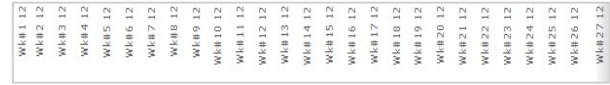
1 **Chart Type** – Choose the chart type desired for your indicator.

2 **Default Interval** – When the chart is generated, the default interval of time shown on the X axis is determined here (e.g. monthly, weekly etc.) The interval can also be changed after the chart is generated.

Chart showing monthly intervals on X-axis



Chart showing weekly intervals on X-axis



3 **Show Line Title** – If this box is checked the name and numerical value will appear alongside each respective Comparison Line. For example Mean = 11.25. Comparison lines can be shown or hidden (see Comparisons 1 – 4)



4 **Swap Rows and Columns** – This option is not currently in use

5 **Comparisons 1 - 4** – Show or hide these pre-set comparison lines on the chart when generated. These lines can show values such as the mean and can be compared with the data set. Other values specific to the indicator set can be added such as number of falls per month. This can be done via Lists and Codes Maintenance.

