#### **Introduction**

This reference guide is aimed at managers who will be responsible for managing users within RiskMan where RiskMan is 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 -> References Guides* page

#### 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

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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
- 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 contain 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 10 button

General	Incident	Quality A	Activity	Risk	Feedback	
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#### 2. Creating a network user

In the Login Details section, click on the Link network account <sup>20</sup> button and search for the user

**Note:** The way you search for users will be dependent on how your IT has configured LDAP. In this example we are using a wildcard **"\*"** so that we can find all users whose name starts with "anne"

- Type the users name into the search field and click search <sup>6</sup>
- Click the users name in the list displayed
- The user's details e.g. Username, Display Name (in most cases) and Email Address will be autopopulated into the respective fields. The user's password won't be visible

#### 3. Creating a non-network user

- Check the Network account NOT used ④ field
- Enter the user's Display Name, User Name (logon), Password and Email Address (it is advisable that all managers have an email address registered with their User Profile so they can receive emails from RiskMan). Note that you will

need to meet password complexity requirements, if your system is configured to mandate this.

#### 4. For both network and non-network logons

• 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 ③: 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
- 5. 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 6 button
- The list of Locations will populate into the **Restriction Details**
- Highlight as required (Hold CTRL key if you wish to select more than one Location)

Facility Restriction:	Location Restriction:
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 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

6. To save the user, press Save User 8

#### 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

 Click on the Incident tab ① 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
  - Reset fields to this type 2: Select the same Incident template the user will be assigned to. The Incident fields, User permissions, Field Settings and any "Restrict to these Reports" and/or "Restrict to these Journal Types" restrictions for that template will be updated

**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

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- Start Page <sup>(3)</sup>: If this was selected under the General tab it will also display here. If not, you can select a start page from this list.
- 3. **Restriction Details (**): 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.
  - 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)

Restriction Details (All restrictions in this section	in are shared between all modules.)	
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Entry/Update Restrictions Facility Restriction:	Location Restriction:	
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Administrative Services Ambulatory & Community Servi Carpark Finance *	Acute Aged Care Service Allergy, Immunology & Respirat Anaesthetics	Aged Care Services. E Aged Psychiatry Services. E Allied Health Antatemical Pathology *

- 4. **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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General Incident	Quality Activity	Risk	Feedback
	User Profiles (Fee	(back)	4
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DOB: Optional Entry 👻	Gender: Optional Entry	•	Age Range: Optional Entry 👻
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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 S: 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 2
- 3. If you would like this user to be an active Risk Register user, press the **Save User ()** button

General In	cident Quality Activity <b>Risk</b> Feedback
	User Profiles (Risk)
Select User: Anne Hayden (Anne	eer does not have a record in this Register. Save this page to create one. O 'Default' configuration loaded, edit as required.
6 Users found.	Only Shaw Users with no permissions in this registers. Rebuild Select User' List Now
Network Username Filter:	Type null to get unlinked users, % to get linked users only.
RiskMan User Type Filter:	-
User Position Filters	•
User Created After Date:	Include users with no Permissions in Search:
User Has Facility Restriction:	<ul> <li>Only show active users in search:</li> <li>منهى مالية من المركز ال المركز المركز المري ال</li></ul>

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

			Her - P	rofiles (Risk)	-	
			User P	rofiles (RISK)	0	
ielect User: Laurer	61 Users found.	v		User Registry	Save User New User	Delete User
Juar Nama Filtari				Rebuild 'Select User' List Now		
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ogin Detaile		1				
Iser Display Name:	Lauren HAUPT			This user's position is	Dropdown Details Not Foun	4
Associated Network I		Linked network account	8			
Network account NO					-	
User Name:	Lauren Haspt			This user's RiskMan User Type is		
Email Address:	Lauren@risk			Alternate Email Address	Reapply the above to	implata permissions
Email Address: Phone Number:	Laurenginsio	man.nec.au	_	Alternate Email Address Hohile Number		
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## **CREDATIX** RISKMAN QUICK REFERENCE GUIDE TO USER MANAGEMENT (Network Logins)

- 5. **Restriction Details (b)**: 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.
  - 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)
- 6. **Specific Restrictions ()**: This section will display the Register specific restrictions
  - Highlight the Entry/Update, Reporting and/or 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 for a Network
   Account: The Display Name, Username, Email Address and Password will be controlled by your Network
   Logins, however all other parts of the Login Details can be modified if required
- Modifying the user's Login Details for a Non-Network Account: 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 **never modified** 

# General Incident Quality Activity Risk Feedback User Profiles (General) Seter torm Total of the feed of t

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"
  - Select the user from the Select User **0** list

#### Modifications: Template Changes & Specific Restrictions

- Click on the specific **Register** tab **1** and locate the user
- 2. Modify the **Template** changes in the Login Details② as required
- This user's RiskMan User Type is: Select the template the user will be assigned to for the selected particular 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 ()** as required

4. Press Save User 4
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General	Inc	ident	Qualit	ty Ac	tivity	Risk	Feedt	back		
			Use	er Prof	iles (Incid	ent)	A			
Select User: Lauren B.	AUPT					User Registry	Save User	New Us	er Dulute Us	var
	55 Users found.									
User Name Filter:					Rebuil	ld 'Select User' List No	w			
Network Username Filte	es 👘				Type null to get un	slinked users, % to get li	nked users only.			
RiskMan User Type Filte	•			v	Only Show Us	ers with no permissio	ns in this register:			
User Position Filter:				v						
User Created After Date User Has Associated Clie				~		s with no Permissions i tive users in search:	in Search:			
	NAT RESTRICTION:			•	• Univ show ac	tive users in search:				
Login Details										
User Display Name:	Leuren HAUPT					This user's pro	sition is:			×
Associated Network Use Network account NOT u		Linked network act	count 😣							
User Name:	Lauren Haupt				-	s user's RiskHan User	Turne Inc. Default	0		~
user name.	castren Haupt					s user s kiskrian user		apply the above	template permission:	
Email Address:	Lauren@riskm	aninetiau				Alternate Email A				
Phone Number:						Mobile P				
Profile Duration:	C Expires On						rt Page: Ny Home P in Date: 20 Sep 20			
	Never Expi	res				Last Log	in Date: 20 Sep 20.	18 08:26:42		
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Has Delegated Authority Not Delegated	eTe	Date To Start	Date To	o End	Is acting as Not A Delegat	a Delegate for ia	Dat	e To Start	Date To End	
Restriction Details		(All restrictions in this section	are shared between a	il modules.)						
No Restrictions in this area have	e ary selected items.									¥
Specific Restrictions	3	(Restrictors in this section a	re specific to the registr	ler.)						
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Show only "Alerted"		nbox.								
	Inciden	t Involved Restrictioni								
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Show only "Alerted"		t Involved Restriction:								
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	Comprehensive O	etom Benort				General Co	mments			
	comprenensive Co	access Report				Handover Notification				
APerson Affected										
LName		Optional Entr	2							
										_

Example: Modifying a User under the Incident Register User Profile

### Searching for a User

#### **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
  - If the user is a network user their username, password, email and in most cases display name will be controlled by your IT Dept and therefore cannot be modified in the User Profiles.
  - If the user is a non-network user, only the username cannot be changed. 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

0					_
Genera	al Incident	Quality	y Activity 👘 Risk	Feedba	ick
		User Pro	ofiles (General)	A	
Select User: Lauren HAU			User Registry S	iare User New Use	r Delete User
	57 Users found.				
User Name Filter: Naturotk Username Filter:			Rebuild 'Select User' List Now		
Network Username Filter: RiskMan User Type Filteri		V	Type null to get unlinked users, % to get linked use Only Show Expired Usersi	nx only.	
User Position Filter:	Dropdown Details Not Foun		Only Show Expired Users:     Only Show Deleted Users:		
User Created After Dates	Chapterior Destrict Hot Paul		Include Deleted/Expired Users in Search:		
User Has Associated Client	Restriction		Exclude Deleted/Expired Users from search	h-1	
			Contract accord charge and have		
Login Details User Display Name:					
Associated Network Useri	Lauren HAUPT Lauren Haupt Linked network		This user's position is	Dropdown Details Not Four	ed .
Network account NOT used		Artsun			
User Name:	Lauren Haupt		This user's RiskMan User Type is	Client Not Team	Y
			•		amplate permissions
Email Address:	Lauren@riskman.net.au		Alternate Email Address		
Phone Number:			Nobile Number		
Profile Duration:	O Expires On		Start Page	Ny Home Page	~
	Never Expires		Last Login Date:	20 Sep 2018 08:26:42	
Current/Pending Delegation	n				
Has Delegated Authority Te Net Delegated	2 Date To Sta	rt Date To End	Is acting as a Delegate for Not A Delegate	Date To Start	Date To End
Restriction Details	(All restrictions in this see	fon are shared between all modules;			
No Restrictions in this area have a	ny selected litera.				
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	asociated Client Restriction		<b>Client Specific Site Restriction</b> :		
RiskMan Inte Registers De	ernational A				
7 Eleven ACSO (Aust	Community Support Organisation)				
Reporting Restrictions			Filter List		
	ted Client Restriction:	Client So	ecific Site Restriction:		
RiskMan Internatio Registers Damo Sil	nel ^				
7 Eleven	unity Support Organisation)				
ACSO (Asst Comm	unity support organisation)				
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Easy: Less Than 1 Routine: 1-4 Days		Client Has Since Up No Longer Required	d C	dministrative hange	^
Involved: 1-4 Wee Complicated: 3-6 V		Not Possible Other Reason (Not	6	nhancement	~

# 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>(6)</sup>
- 5. Enter the delegation period ④ (End Date should be the date the user is returning)
- 6. Press Save 6

			<b>User Profile</b>	c (Conoral	<b>`</b>		
			User Prome	s (General	)		
Hayden, ) 1 Users fo	Anne (ahayden) wund.	•		User Registry	Save User	New User	Delete User
User Name Filter:	hayde	Manage Delegate:	Webpage Dialog		Contraction of Con-	free line	-
RiskMan User Type Fil	teri		Manage D	elegates fo	r Hayden, Anne	e (ahayden)	
User Position Filter:		Add Delegate					
User Created After Da	ite:		staff member as y	our Delegate			
User Has Campus* Re	striction:		eone anna (Leone Anna		88		
		Start Date	Fuesday, 22 May 2012		•		
Login Details		End Date	Thursday, 31 May 2012	4	Save 5	1	
Jser Display Name:	Hayden, Ann						
Jser Name:	Format as (L	Delegate's Username	Delegate's	Name	Delegation start date	Delegation en	d date
Password:	anayden			There are no iter	ms to show in this view		
Imail Address:	anneBriskm						
Phone Number:							
Profile Duration:	C Expires (						
	Never Ex						
Current/Pending Dele	gation						
Edit Delegation							

#### To modify/delete an existing delegate

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

elect User: Hayden, A 1 Users fo		¥	6	User Registry	Save User	New Use	r Delete User	
User Name Filter:	hayde	👩 Manage Delegat	es Webpage Dialog					
RiskMan User Type Filt User Position Filter:	ier:		Manage Del	egates for I	layden, Aı	nne (aha	yden)	
User Created After Da	te:	Add Delegate						
User Has Campus* Re	striction:	Edit or select a	staff member as you	r Delegate				1
		Delegate	leone anna (Leone Anna)	- 8	_	-		
Login Details		Start Date	Tuesday, 22 May 2012	~	B	4		
-		End Date	Thursday, 31 May 2012	× (	Update	Delete		
Jser Display Name:	Hayden, An Format as (I ahayden	Please double click						1
Password:	anayden	Delegate's Usernar		me	Delegation start da	ite	Delegation end date	
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hone Number:								
Profile Duration:	C Expires							
	Never E							
Current/Pending Dele	gation							
Edit Delegation								

#### 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 & 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

				0	
General	Incident	Quality	y Activity	Risk	Feedback
			User Profile	s (Risk)	
Select User: 7 Users found.	•			User Regis	try Save User New User Delete User
User Name Filter:				Only Show Users with	no permissions in this register: Rebuild 'Select User' List Now
Network Username Filter:		Туре	null to get unlinked u	ers. % to get linked use	rs only.
RiskMan User Type Filter:		-			
User Position Filter:					
				Include users with no	Permissions in Search:
User Created After Date:					

- 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 <sup>2</sup> 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

		L L	Jser Profile	s (Risk)	
Select User: 1 Users found.	•			User Regis	try Save User New User Delete User
User Name Filter:	arti (2)		• 6	Only Show Users with	no permissions in this register: Rebuild 'Select User' List No
Network Username Filter:		Type null	to get unlinked use	rs, % to get linked use	irs only.
RiskMan User Type Filter:					
User Position Filter:					
User Created After Date:				Include users with no	Permissions in Search:
User Has Facility Restriction:				Only show active user	s in search:

- 3. Select the user from the **Select User S** list
- 4. Press Save User 6
  - A message will display to inform you that the User is now activated

			User I	Profiles (Risk)	6
Select Users Lauren HAU	PT S1 Users found.	⊻ (5)		User Registry S	ave User New User Delete User
User Name Filter:				Rebuild 'Salect User' List Now	
Network Username Filter:				Type null to get unlinked users, % to get linked users	anity.
RiskMan User Type Filteri			~	Only Show Users with no permissions in this	registen
User Position Filters	Dropdown	Details Not Found			
User Created After Date:				O Include users with no Permissions in Search	
User Has Associated Client	Restrictions		~	Only show active users in search:	
Associated Network User:		Linked network account		This user's position in:	Dropdown Details Not Found
User Display Nerve: Associated Network User: Network account NOT used User Name:	Lauren Haupt	Linked network account		This user's position is: This user's RishNan User Type is:	
Associated Network User: Network account NOT used	Lauren Haupt	Linked network account 3			
Associated Network User: Network account NOT used	Lauren Haupt				Client Mgt Team
Associated Network User: Network secount NOT used User Name:	Lauren Haupt			This user's RiskMan User Type is:	Client Mgt Team
Associated Network User: Network account NOT user User Name: Email Address:	Lauren Haupt			This user's RishMan User Type is: Alternate Email Address: Hobile Number:	Client Mgt Team
Associated Network User: Network account NOT user User Name: Email Address: Phone Namber:	Lauren Haupt			This user's RiskNes User Type in Alternate Email Address Heakin Number Shat Page	Client Mpt Team

 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**  
   tab e.g. Risk, Incident, Quality
- 2. Locate the user. Either
  - Select the user from the Select User 😢 list; or
  - Enter filter criteria in one of the filter fields (and Press "Rebuild 'Select User' List Now" (a). Select the user from the Select User (a) list
- 3. Press Delete User 6
- 4. A **message o** will display to let you know that this user has been deleted from this Register only.

General	Incident	Quality A	Activity	Risk Feedback	
General	Incluenc		ser Profil		_
		-			<b>(5)</b>
Select User: Andrew Martin 1 Users found.	(amartin) 👻 2			User Registry Save User New User D	elete Use
	(amartin) • 2		0	User Registry Save User D Only Show Users with no permissions in this register; Rebuild 'Select Us	
1 Users found.	9	Туре			elete Use ser' List N
1 Users found. User Name Filter:	9	Туре и		Only Show Users with no permissions in this registers Rebuild Select Us	
1 Users found. User Name Filter: Network Username Filter:	9	Type =		Only Show Users with no permissions in this registers Rebuild Select Us	
1 Users found. User Name Filter: Network Username Filter: RiskHan User Type Filter:	9	Type = •		Only Show Users with no permissions in this registers Rebuild Select Us	

		User Profile	es (Risk)
The User Profile 'a			narked as deleted (not physically deleted), and can
		be restored if	necessary. 6
Select User:    Zero Users fou	nd.		User Registry Save User New User Delete User
User Name Filter:	andrew	0	Only Show Users with no permissions in this register: Rebuild 'Select User' List Now
User Name Filter: Network Username Filter:	andrew	O Type null to get unlinke	
Network Username Filter:	andrex		Only Show Users with no permissions in this register: Rebuild 'Select User' List Now
			Only Show Users with no permissions in this register: Rebuild 'Select User' List Now
Network Username Filter: RiskMan User Type Filter:			Only Show Users with no permissions in this register: Rebuild 'Select User' List Now

#### 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

	0					
	General	Incident	Quality Activity	Risk	Feedback	
	Select User: Andrew Martin (amart		User Profiles (General	·	User New User	5 Delete User
	1 Users found.		User	Registry Save		
ſ	User Name Filteri	andrew 2			Rebuild 'Select User' Lis	t Now
	Network Username Filter:		Type null to get unlinked users, %	to get linked users o	nly.	
3⊀∣	RiskMan User Type Filter:		<ul> <li>Only Show Expired Users:</li> </ul>			
רי	User Position Filter:		<ul> <li>Only Show Deleted Users:</li> </ul>			
	User Created After Date:		Include Deleted/Expired Use	rs in Search:		
- U	User Has Organisation* Restrictio		Exclude Deleted/Expired Use	er from constru		

- 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
     list

#### 3. Press Delete User 6

If the user has **not used RiskMan** they will be deleted from the database (as per example below).

		User Profiles (General)
	The User Pro	ofile 'Anne Hayden' has been deleted.
ielect Useri	•	User Registry Save User New User Delete User
12 Users found.		
User Name Filter:		Rebuild 'Select User' List Now
Network Username Filter:		Type null to get unlinked users, % to get linked users only.
RiskMan User Type Filter:		Only Show Expired Users:
User Position Filter:		Only Show Deleted Users:
User Created After Date:		O Include Deleted/Expired Users in Search:
User Has Organisation* Restriction:		Exclude Deleted/Expired Users from search:

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

	U	lser Profiles (General)
	The User Profil	e 'amartin' has records in RiskMan.
n order not to lose		, it has been marked as deleted (not physically deleted), and
in order not to lose		be restored if necessary.
lect User: • Zero Users found.		User Registry Save User New User Delete User
		and and a set of a se
Iser Name Filter:	andrew	Rebuild 'Select User' List Now
	andrew	Rebuild 'Select User' List New Type null to get unlinked users, % to get linked users only.
Network Username Filter:	andrew	
letwork Username Filteri tiskMan User Type Filteri	andrew	Type null to get unlinked users, % to get linked users only.
User Name Filteri Network Username Filteri RiskMan User Type Filteri User Position Filteri User Created After Datei	andrew	Type null to get unlinked users, % to get linked users only.  Only Show Expired Users:

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

If a user has 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 reactivated under each of the other Register tabs as required

**Note:** Users will automatically be activated in the Feedback User Profile

#### To restore a user that was flagged as deleted from <u>RiskMan</u>

- 1. Click on the General **0** tab
- In the Filter Criteria section check "Only Show Deleted Users" ②
- 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 Inciden	t Quality Activity Risk Feedback
	User Profiles (General)
Select Useri	User Registry Save User New User Delete User
User Name Filter: andrew 2	3 Rebuild 'Select User' List Now
Network Username Filter:	Type null to get unlinked users, % to get linked users only.
RiskMan User Type Filter:	Only Show Expired Users:
User Position Filter:	Only Show Deleted Users:
User Created After Date:	O Include Deleted/Expired Users in Search:
User Has Organisation* Restriction:	<ul> <li>Exclude Deleted/Expired Users from search:</li> </ul>

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

General	Incident 🚺 (	Quality Activity	Risk	Feedback
		User Profiles (General)		6
Select User: Andrew Martin (amartin) 1 Users found.	*		User Regis	try New User Undelete User
User Name Filter:	andrew			Rebuild 'Select User' List Now
Network Username Filter:		Type null to get unlinked users, % t	o get linked users only.	
RiskMan User Type Filteri		<ul> <li>Only Show Expired Users:</li> </ul>		
User Position Filter:		Only Show Deleted Users:		
User Created After Date:		Include Deleted/Expired Users	in Search:	
User Has Organisation* Restriction:		+ 🔿 Exclude Deleted/Expired Users	from search:	
		was deleted on 28 May 2 save any changes. Undelete first if change		

- 5. The User is now restored **6** under the **General** 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

		er Profiles (General)
	05	er Profiles (General)
	6	User Undeleted.
elect Useri Andrew Martin (amartin	· ·	User Registry Save User New User Delete User
	andrew	Rebuild Select User' List Now
User Name Filter:	andrew	Rebuild Select User List Now
	andrew	Type null to get unlinked users, % to get linked users only.
Network Username Filter:		
User Name Filter: Network Username Filter: RiskMan User Type Filter: User Position Filter:		Type null to get unlinked users. % to get linked users only. Only Show Expired Users:
Network Username Filteri RiskMan User Type Filteri		Type null to get unlinked users. % to get linked users only. O Only Show Expired Users:

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

Note: This does not apply to the Feedback Register

- Click on the specific **Register** tab e.g. Risk, Incident, Quality
- In the Filter Criteria section check "Only Show Deleted Users"
- 3. Press the Rebuild 'Select User' List Now button
  - The Select User 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

- 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 eppears in front of the Label

A Who Was Affected?		
Lincident Involved	Entry Required 👻	
& First Name	Entry Required 👻	4
& Surname	Entry Required 👻	
Berne Brithman and a contraction	- Anton Required	1

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 0** tab
- 2. Select any user from the Select User <sup>2</sup> list

	Iministration   Reports   Help   Log Out	USER: System Manager (Manaj
General Incident Quality A	ctivity Risk Feedback	
•	User Profiles (Incide	ent)
Select Useri Hayden, Anne (ahayden) 2	•	User Registry Save User New User Delete User
User Name Filter:	Only Show Users with	no permissions in this register: Rebuild 'Select User' List Now
RiskMan User Type Filter:	*	
RiskMan User Type Filter: User Position Filter:	•	
		Permissions in Searchs

#### To modify a field label

1. Click on the *M* icon **0** next to the respective field

<b>A</b> Summary	Entry Required	~
A Details	Optional Entry	~

dit Field Deta	il	
Entry		
Title 🕜	Details	<b>2</b> ×
Report		
Title 🕜	Details	6
	Display 🕜	Condition 🕡 🗹 Group 🍘 🗌
Alert		
Title 🕜	Details	4
	Display 🕜	Condition 🕜 🗸
Advanced-		
Post Cell 🕡	<img alt="C&lt;/td&gt;&lt;th&gt;heck Spelling" onclick="parent.fnSp&lt;/th&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Script 🕜&lt;/td&gt;&lt;td&gt;onfocus=" pa<="" src="images/spellcheck.gif" td=""/> <th>arent.fnPreSpellCheck(this);"</th>	arent.fnPreSpellCheck(this);"
	ld 🕜	Obj Class 🕖
	TD Class 🕜	TR Class 🕢

- Enter the label in the New Title Text ② 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 ③ and Alert Title ④ fields accordingly
- 3. 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)

						н	ide Key Perso	nnel Sectio
iisk Owner iisk Coordinatoi Ipened By	Dont Display Dont Display Optional Entry	> > >			of Associate		Dont Display Dont Display Optional Entry	> > >
losed By	Dont Display	~						
dit Field RRN	otifyl yl1OfAl							
	oulyconoina							
Entry	<b>_</b>							
Title 🕜	Notify of As:	sociate	ed Incide	ents				×
Report								
Title 🕜	Notify Accou	Intable	e Execu	tive of Ass	ociated Inci	dent		
	Display 🕜	~	Condit	ion 🕜 💽	Group	0		
Alert								
Title 🕜	Notify Accou	Intable	e Execu	tive of Ass	ociated Inci	dent		
	Display 🕜	✓	Condit	ion 🕜 🕟	/			
Advanced-								
Post Cell 🕜								$\bigcirc$
Script 🕜								$\bigcirc$
	ld 🕡				Obj Clas	s 🕜		
	TD Class 🕜				TR Clas	s 🕜 🗌		

## **Example:** "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form

Edit Field RRN	otifyLvI10fAI	>
Entry		
Title 🕜	Notify of Associated Incidents	×
Report		
Title 🕢	Notify Accountable Executive of Associated Incident	
	Display 🝘 🗹 Condition 🍘 🗹 Group 🍘 🗸	
Alert		
Title 🕜	Notify Accountable Executive of Associated Incident	
	Display 🝘 🖌 Condition 🍘 🖌	
Advanced		
Post Cell 🕢		$\hat{}$
Script 🕜		$\hat{\mathbf{C}}$
	ld 🔞 📃 Obj Class 🔞	
	TD Class @ TR Class @	
	SAVE	aL 🛛

**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

Edit Field Emp	loyeeSite	×
Entry Title 🔞	*GS_ SiteName	
Report		
Title 🕜	*GS_ SiteName	
	Display 🕡 🗹 Condition 🍘 🗹 Group 🍘 🗹	
Alert		
Title 🕜	*GS_ SiteName	×
	Display 🝘 🖌 Condition 🍘 🖌	
Advanced		
Post Cell 🕜		$\langle \rangle$
Script 🕜		$\langle \rangle$
	ld 🝘 📃 Obj Class 🍘	
	TD Class 🔞 TR Class 🔞	
L	SAVE	ANCEL

 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 🀱 icon 🛈 next to the Section Title

d Dates 1	
Admission Date	Dont Display 🗸
Lincident Date	Entry Required 👻
Notification Date	Dont Display 👻
Date Closed	Dont Display 👻

2. Modify the label in the **Current Section Title** ield (*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

Edit Section	2				×
Title @	∲GS_Dates Fill @	SectionName 2 #997788	Text 🕡	#FFFFF	×
		Ŭ		SAVE	CANCEL

 To change the background colour and text colour of the section click on the respective Choose Background Colour <sup>(3)</sup> or Choose Text Colour <sup>(3)</sup> 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

/a Dates	
Admission Date	Dont Display 🔽
dincident Date	Entry Required 💌
<b>M</b> 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

	User Pro	rofiles (Incident)
Select User: Andrew Martin (amartin) • 13 Users found.		User Registry Save User New User Delete User
User Name Filter:		Only Show Users with no permissions in this register: Rebuild 'Select User' List Now
Network Username Filter:	Type null to ge	get unlinked users. % to get linked users only.
RiskMan User Type Filter:		
User Position Filter:	-	
User Created After Date:		Include users with no Permissions in Search:
User Has Organisation Restriction:		Only show active users in search:

 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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	talayse									
ing a column header here t										
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nne Hayden	Anna Tirydan		Unit Manager	Mrit Waraper	53	Tes .		19.34 2052		
tainee 7	Traines 7	Acting Charge Name	Ruk Ner Dzugsten	Rok Wer Dougston	50	50		09 Jan 2912		21 Mar 2012
ainee 6	Trainee 6	Acting Charge Name	Rok Ner Drugston	Rick Net Dougston	59	59		09 Jan 2012		02 May 2012
taktee B	Arti Kazarwth	Arting Charge Name	Risk New Relations	Rid-Wet Education	744	53		09 Jan 3312		03 May 2012
rainee 5	Traines 5	Arting Charge Bares	Risk New Education	Rick Net Education	84	52		09.3an 2012		07 Jun 2862
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General 2	Trainee 2		Risk Ner Education	Risk War Dougston		50		09 Jan 2012		15 Apr 2014
ratt	Secondar, Butt	Darter - Crossilant			Ter	Ter				

#### **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. delete the user (from the General tab) 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.

Columnos 🗹 Employment	Dans Crassel Dans Diplose Dans	Deiesed 🗆 ettel Address 🗆 ettel Dessain	Z Dera Larr Log		information vi							_
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- Espand - Colo	i pan											
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RiskNan User	Rak/Kan User		644	¥.	Na	No.			19-0412086		04 X to 2016	
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General Templata: Hanager												
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#### Example: User's grouped by their assigned General Template

			User	er Regis	lew					
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Displays Colored News	Diplied Users 🗹 Allive Users									
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Feedback Template (Original)	Tatager									
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Trainee B	Arti Nazareth	Ading Charge Furse	Rak Nan Education	Yes	50		09 Jan 2002		0 May 2012	
		And an effective design of	and a second sec		-		A3.1		17. A	

Example: Users grouped by their assigned Feedback Template.

2. **Display Name** – Checks to see if a non-network user has more than one logon in RiskMan

	S User Name	8.							
		Employment Role							
Ξ,	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								
	default	Acting Charge Nurse							
Ξ	User Display Name: Dhiraj D								
	Dhiraj	CEO							
Ξ	User Display Name: Esler, Scott D.								
	Scott Esler								
-	User Display Name: Executive								
	Executive								
-	User Display Name: Faulkner, Laura								
	lauraf	Priest							

#### How do I assign staff to Managers?

Refer to the RiskMan Manager/Staff Relationships Guide

accessible via the menu Help -> Reference Guides