- Working with Lists -

FOR RISKMAN VERSION 2106

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INTRODUCTION

Every record list that you have permission to view in RiskMan can be configured to suit your requirements. Further to this, each record list can be configured *individually*, meaning that for example if you can see the

- Entered Incidents page,
- Incident Inbox page, and
- Posted Incidents page

…you can set each one up with its own unique configuration.

You are able to:

- Change the columns being displayed, their widths, and the order in which they appear
- Change the number of rows shown per page
- Change the way the list is sorted, grouped, and filtered
- Save the way you've configured the page as a "View", and switch between your personally configured views
- Export the resulting list to a Microsoft Excel file if you wish

This guide also explains list functionality which is based on user permissions, so you might not have permission to some of these functions (it depends on your level of access). These include:

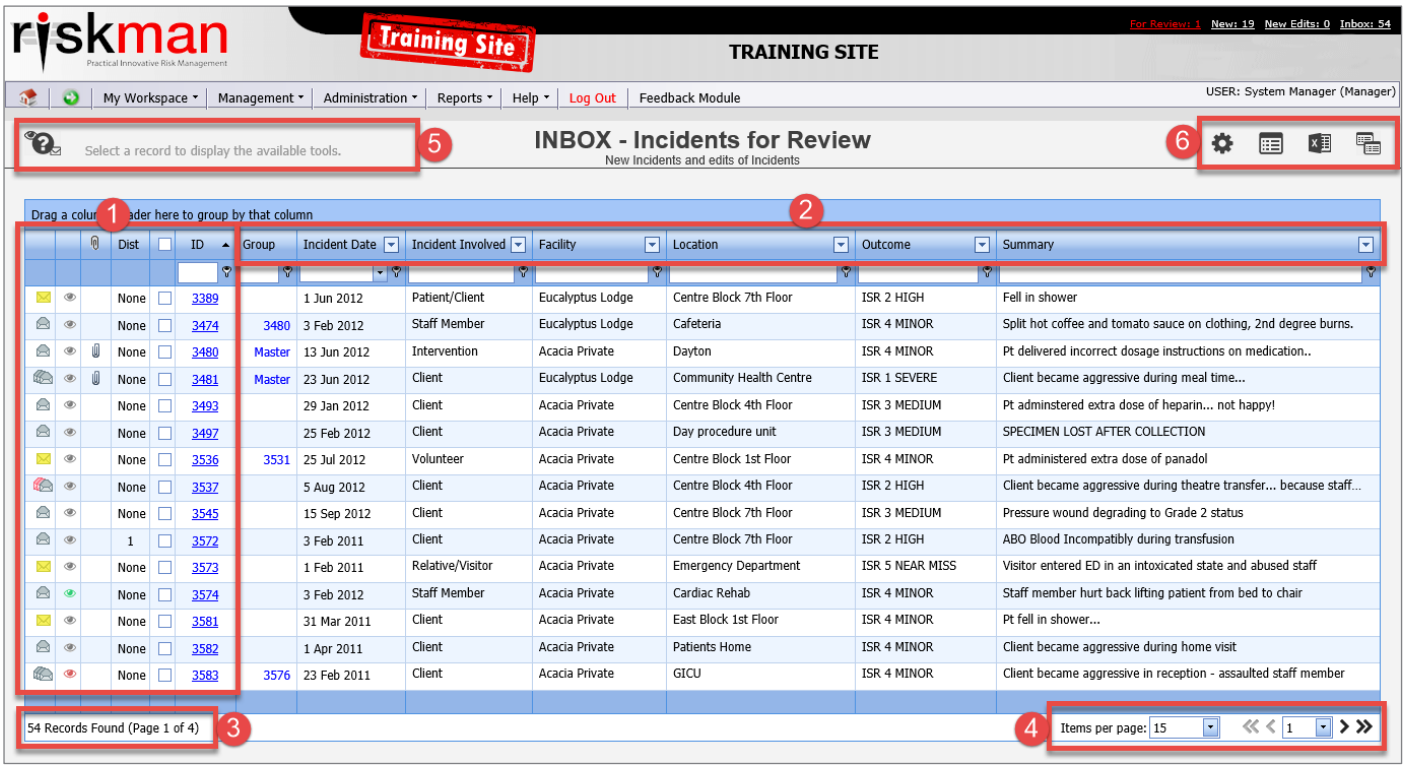
- Ability to generate a "Letter", based on an existing record in a register
- Ability to clone or update a record
- Ability to reassign ownership of a record

ⓘ Note

This information in this guide applies to any register, however we have used an Incident register in the screenshots as it is the most universal register.

LIST BASICS

Here's an explanation of the common functions on your lists:



❶ You cannot modify these columns; they will always be displayed as-is.

❷ Columns that you can change: Column order, widths, show/hide, etc

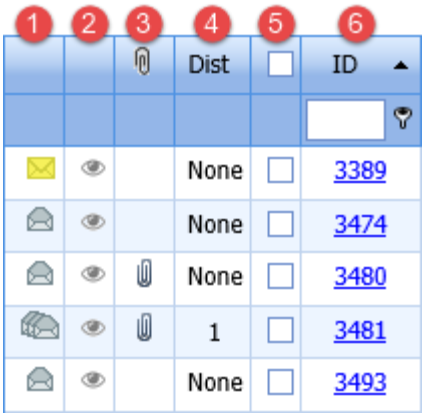
❸ Pagination info: Total records and page count

❹ Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page

❺ Toolbar: When you select a record, the available functions/options for working with that record appear here

❻ Toolbar: Options for configuring and working with your list overall

The fixed columns: Explanation



1. "Administrative" status of the record. Click the icon for more information.

2. Your personal viewing status of the record. Green: You've never opened it. Grey: You have opened it. Red: Since you last opened it, someone else has modified it. Also, click the icon to open the Review History of the record.

3. The paperclip tells you there is at least 1 document attached to the record

4. Dist is short for Distribution List. Usually it will say None. In this example, there is a number – 1 – in one of the rows. This represents the number of users who have been put on the Distribution List for that record *who have not yet viewed it*. This column is also a shortcut – click it to distribute the record to other users.

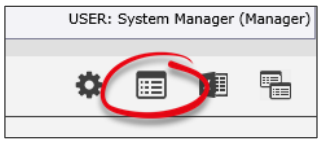
5. Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.

6. ID number: Click on the record's ID number to open it. Note that you do not need to check the record's selection box before clicking the ID number!

MODIFYING YOUR LIST

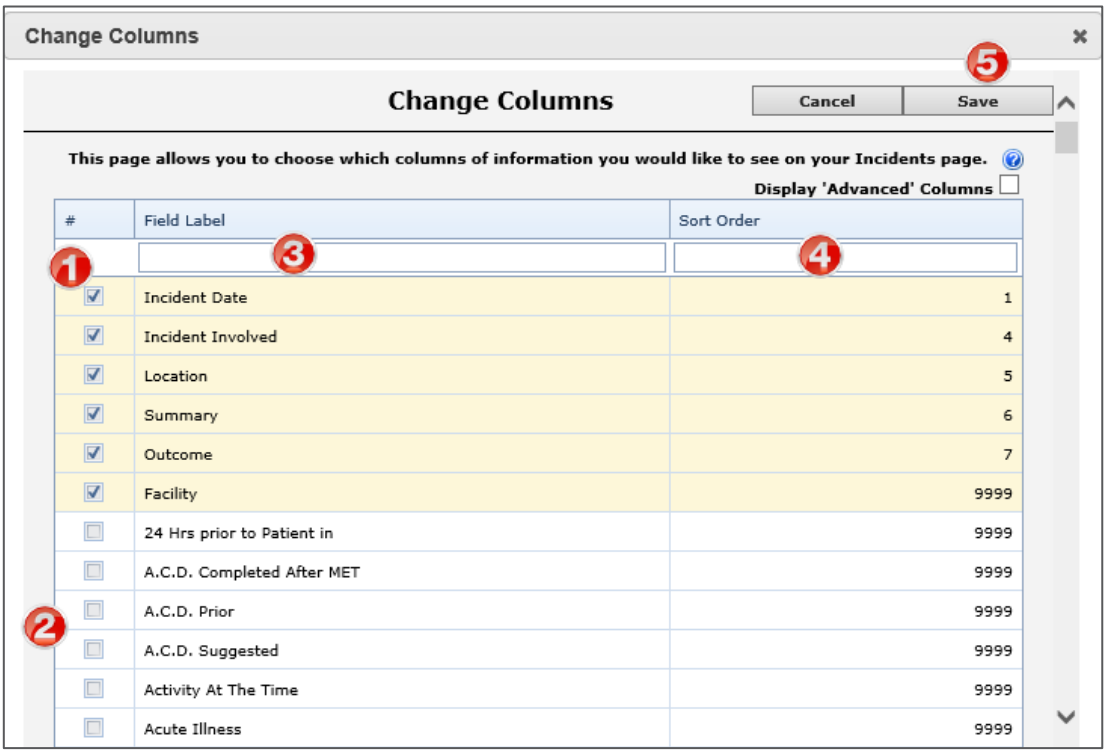
Changing the columns shown on your page

Essentials

Click the **Change Columns** icon in the 

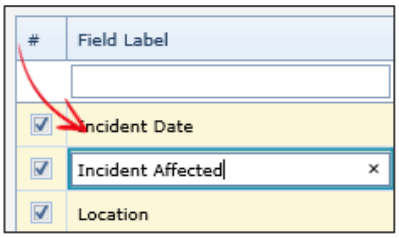
toolbar.

The Change Columns dialog is shown. Highlighted at the top of the list are the columns currently being displayed on your list:

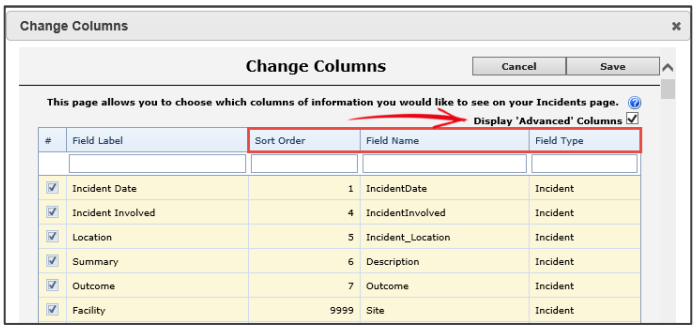


1. Uncheck to remove column
2. Scroll through the list of fields and check each one you want to display as a column on your list
3. Can't find what you're after? Start typing a field name here to search the list
4. Set the default order of your columns. This is useful when ever you clear a view in your list, it will assume the order you have set. Any numbers in the Sort Order column that are the same will appear in alphabetical order. In this example 9999 is set to alphabetical order
5. Click the **Save** button once you're done. Your list will refresh, and the columns you selected will be displayed.

Extras



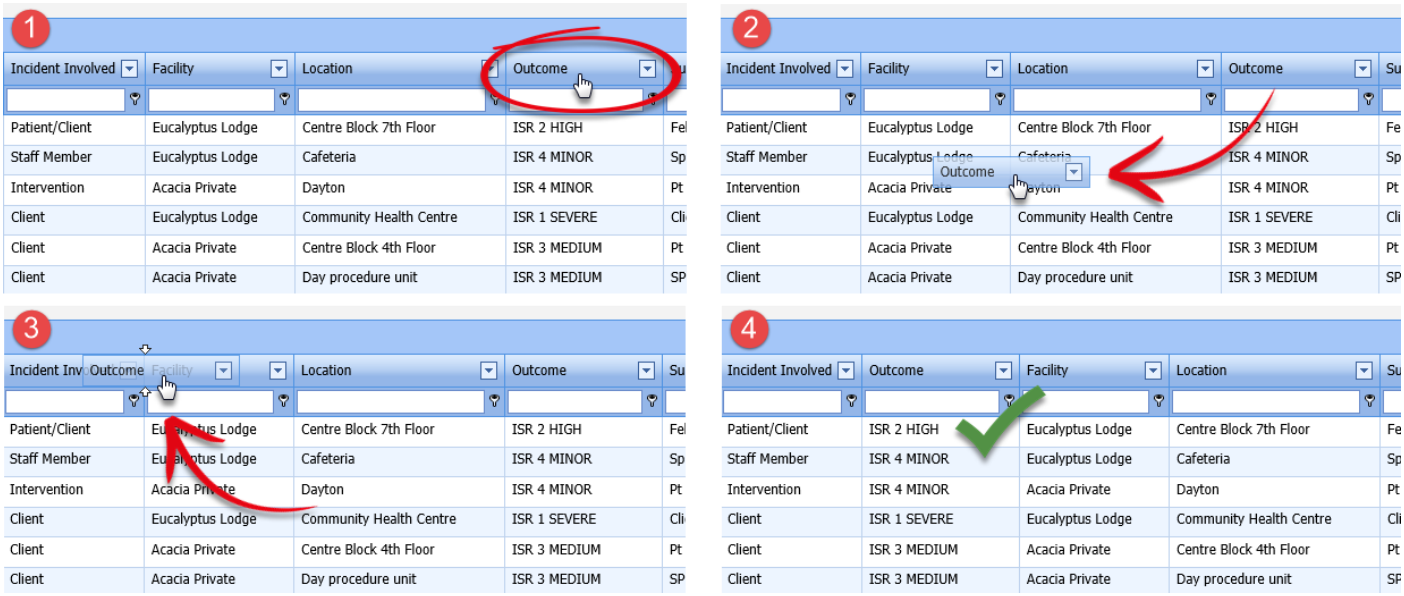
You can edit the **Field Label** if you like. You might do this to abbreviate a long field name. Your changes are only visible on this list, and they will not affect any other part of the system.



Check the **Display 'Advanced' Columns** box to show additional information for each field. You might need to use this option to differentiate between several fields from your register that have the same label; in which case, you could determine which is which by referring to the **Field Name** column, which contains the unique name of that field in the database.

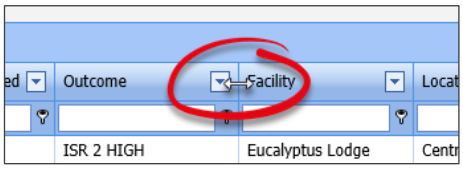
Change the order of your columns

Simply click and drag a column header to a new spot to rearrange your columns. When you see the two white arrows, you can release your mouse button. The system remembers your changes as you go.



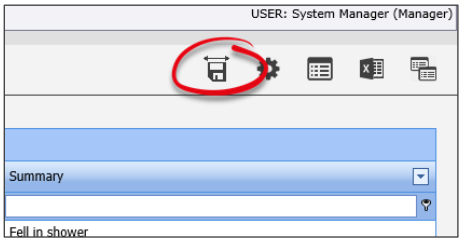
Adjust the widths of your columns

Once you have your columns in their desired order, you can adjust their widths to make the best use of the space available on your screen. We recommend adjusting them from left to right.



Put your mouse cursor on the line the separates each column. Click and drag left to right to adjust as needed.

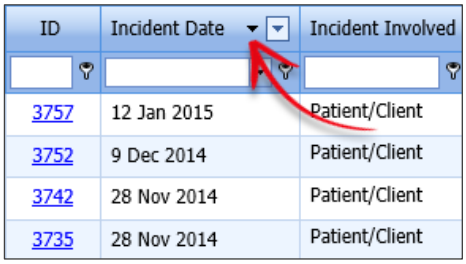
Once you have adjusted all the column widths as desired, click the save icon in the toolbar to save your changes.



Note that the save icon only appears in the toolbar *after* you've started adjusting the width of your first column.

Sort your list

Click on a column heading to sort your records by values in that column.

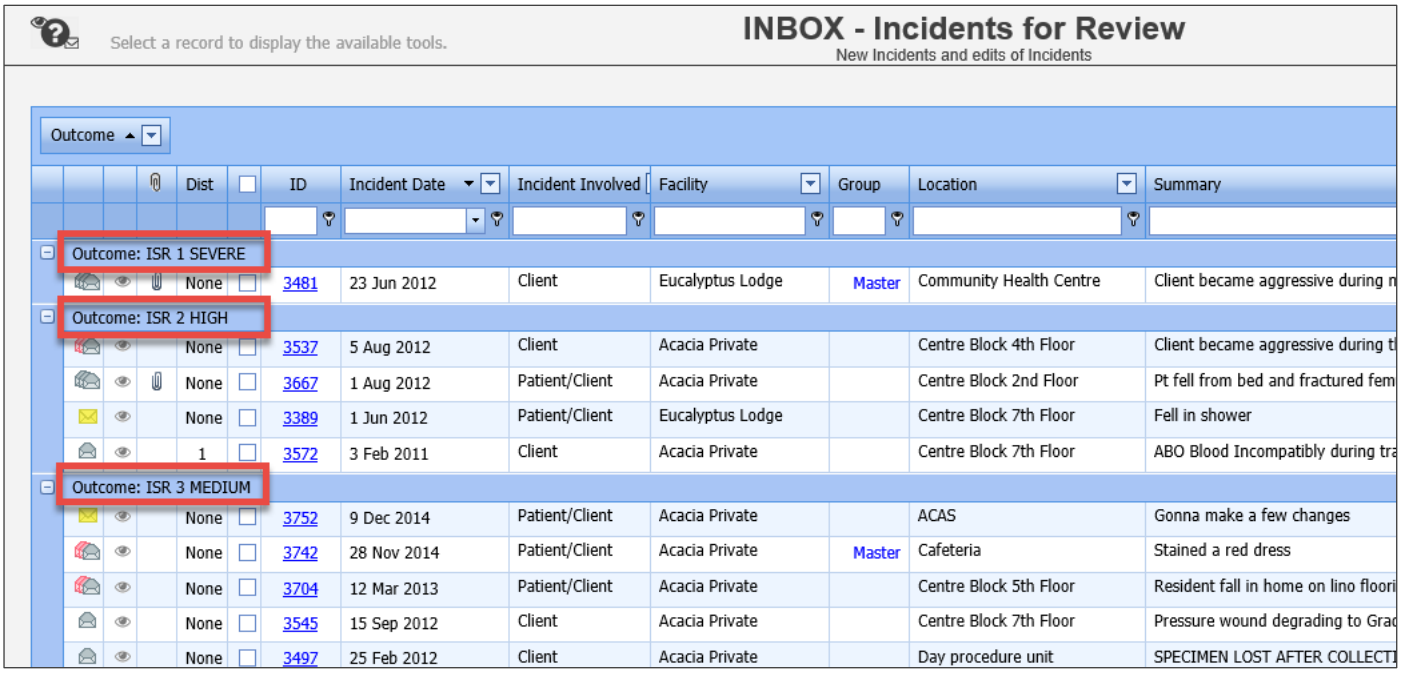


The arrow represents whether you are sorting in ascending or descending order.

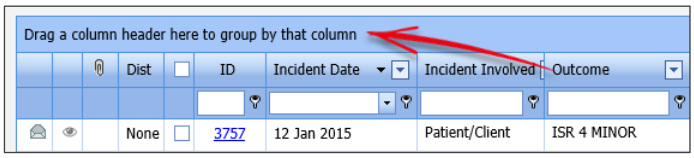
The column you sort by will always be remembered on this list.

Group the records on your list

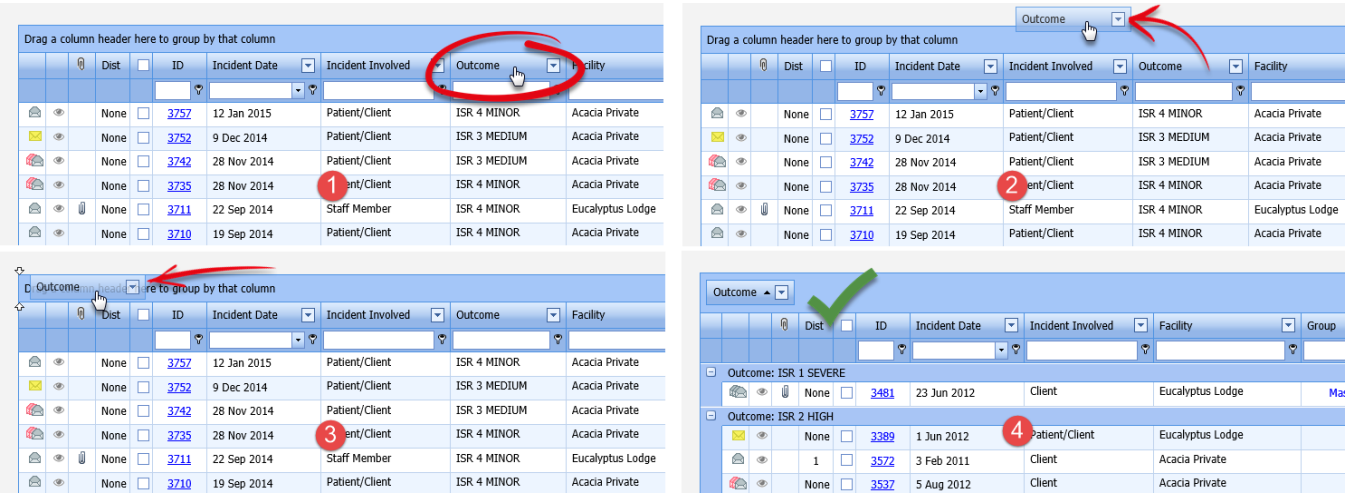
Group the records based on one of the columns showing in your list. In this example we've grouped our incidents by their severity rating:



In order to group your records, click and drag the column header to the space above the list which says **Drag a column header here to group by that column**:



Click and drag a column header to the grouping area. When you see the two white arrows, you can release your mouse button. The system remembers the groupings you have added.

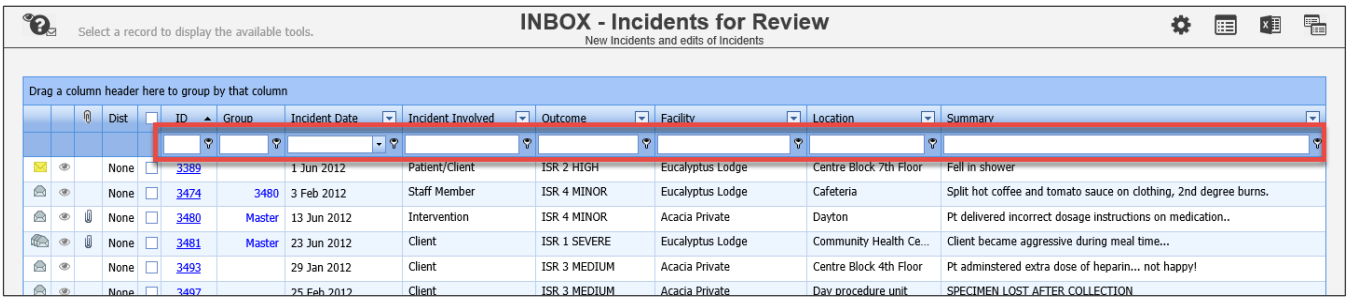


You can add subsequent grouping levels by following the same steps.

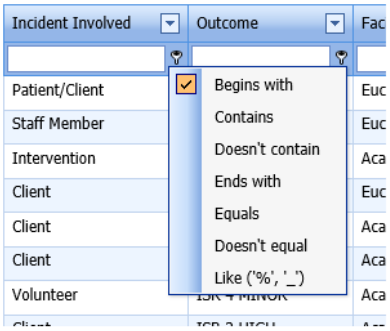
To **remove** a level of grouping, simply click and drag the column header back to where you want it to be in the list.

Filter your list

You can apply a filter to one or more of the columns showing on your list, so that you only see a specific subset of the records in your list. Each column header has a filter box underneath it:



Click the funnel icon to select the type of filter test you want to apply:

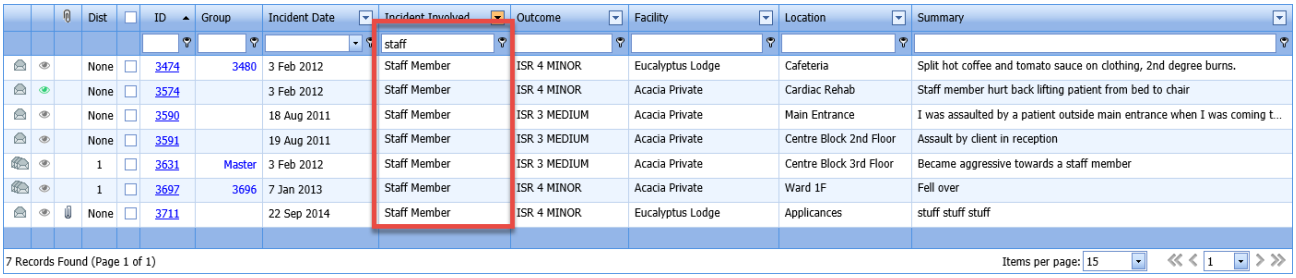


***Text**: Filter tests that can be used against data fields*

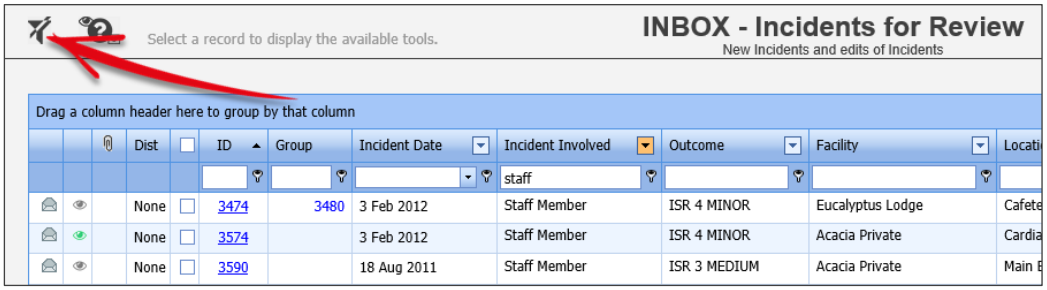
***Numbers**: Filter tests that can be used against date / time / numeric fields*

Note: When filtering your list that is a multi-select field, you must use the "contains" filter and not "equal". The reason for this is the way the values are stored behind the scenes and for technical reasons that you won't be able to see

Type the desired value and press Enter on your keyboard. Your list will then only display matching records:



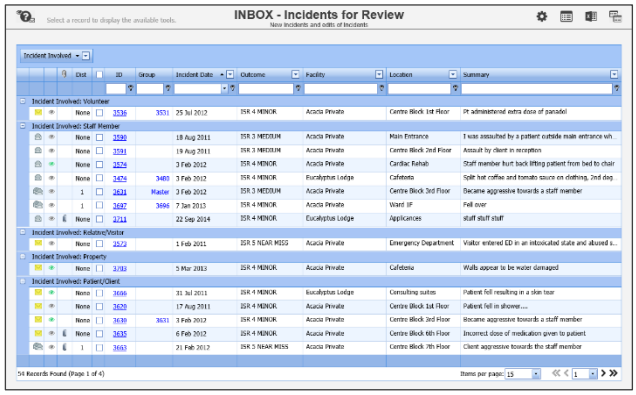
To remove a filter, click into the filter box, delete your filter criteria, and press the Enter key on your keyboard. To remove all filters at once, click the **Clear Filter** icon in the toolbar:



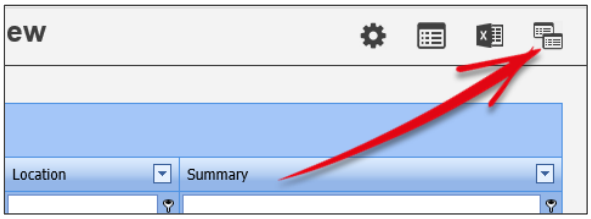
Save the way you have configured your list as a "View"

Once you have setup the columns you want, and applied sorting, filtering, or grouping to your list, you can then save that configuration as what is called a **View**. You can have multiple saved views that you can switch between with the click of your mouse.

In this example, we've grouped our records by the Incident Involved field, and we have sorted the records by incident date.



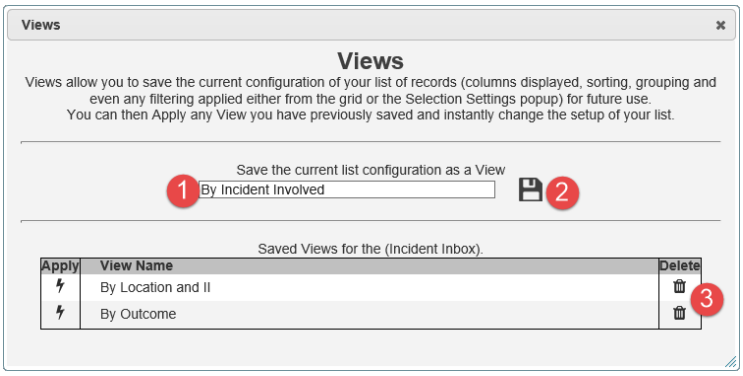
In order to save this as a view, we need to click the **View** icon in the toolbar.



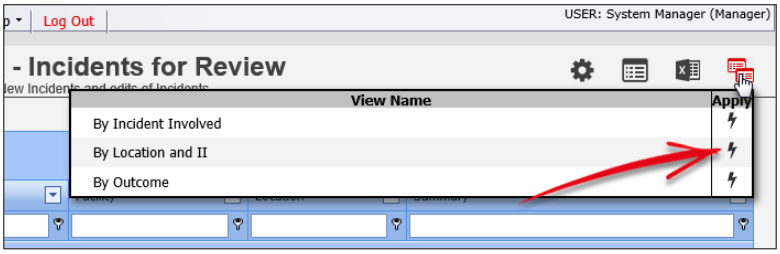
❶ Type a name for your View.

❷ Click the **Save** icon. You will be returned to the list, and a message will be displayed to confirm your view was saved.

❸ You can delete any of your existing views by clicking the respective **Delete** icon.



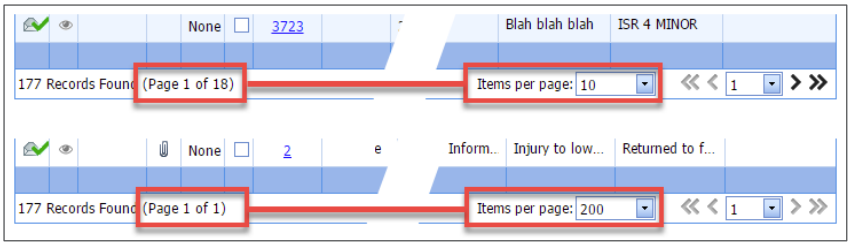
You can now switch between your saved Views by hovering your mouse (do not click) over the **Views** icon, and clicking the **Apply** icon of the View you wish to load.



Export the list to Excel

You can export the records shown on the current list by click the Excel icon in the toolbar.

Only the first page is exported, so if you list contains more records than can be displayed on one page because of your pagination settings, simply increase the number of items per page so that they fit on to one page.



ⓘ Note

The Export to Excel function may not be available as it is permissioned by your Administrator.

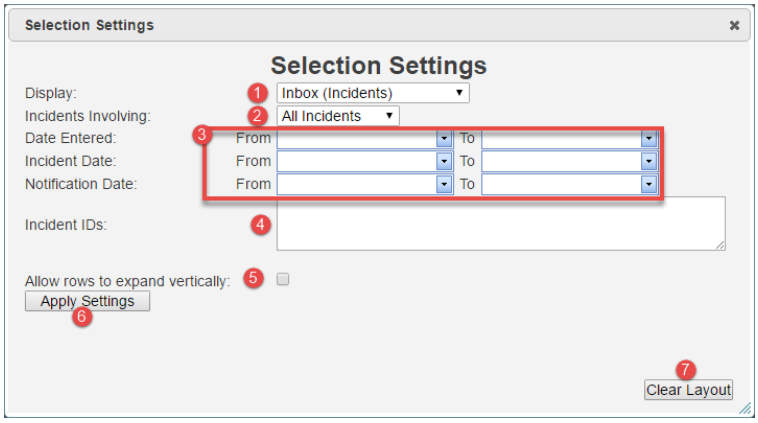
Selection Settings

In the toolbar, you'll note the Selection Settings cog icon . It contains the following functionality:

❶ Switch between the various record lists that you have permission to view

❷ Restrict the records being shown on your page by record type; in this example by Incident Involved

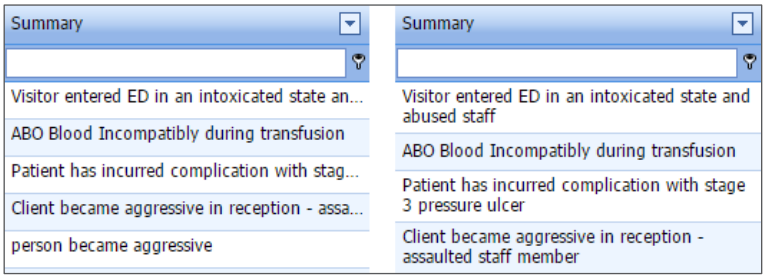
❸ Restrict the records being shown on your page using date filters (the date fields available will vary by register)



❹ Restrict the records being shown on your page by specific record ID numbers. Separate multiple ID numbers using a comma, e.g. 51,73,106 etc

❺ You set the width of the columns you have chosen to display on your list. By default, if any individual cell contains more information than can be shown, the information will be truncated, and an ellipsis displayed instead.

Enabling this setting will force the content to be displayed; information in the fields will wrap instead of being truncated.



***Left**: Setting turned off* ***Right**: Setting turned on*

❻ Once you have configured the various settings, click the **Apply Settings** button. Your list will refresh with your desired settings in place. The settings you apply here will be remembered until you decide to change them.

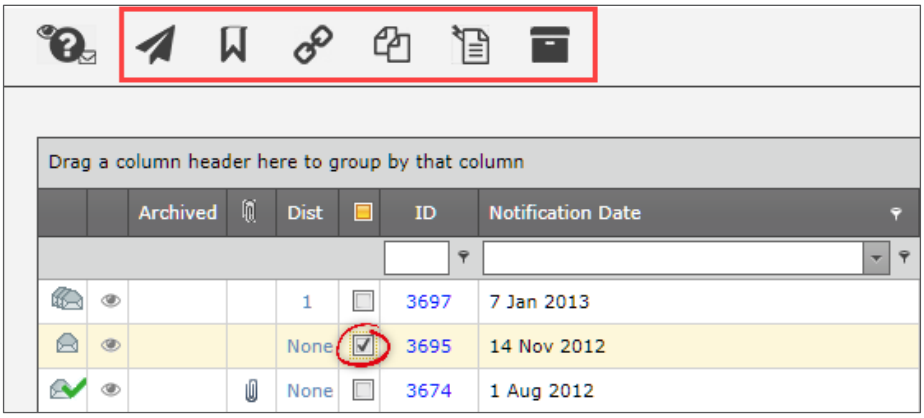
❼ Should you wish to return your list back to a “default” configuration, click the **Clear Layout** button. This returns your list to the default settings, including columns displayed, removing all sorting, filtering, and grouping, and clears all of the settings applied in the Selection Settings dialog. Note that any **Views** you have created will not be affected by this action.

MODIFYING THE RECORDS SHOWN ON YOUR LIST

Functions/Option Toolbar

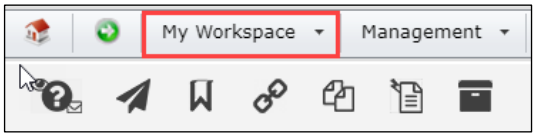
When a record is selected from a list by clicking on the check box in the Selection column a Function/Option toolbar of icons will appear.

The Functions/Options icons are shown on the top left of the screen, underneath the menu buttons.

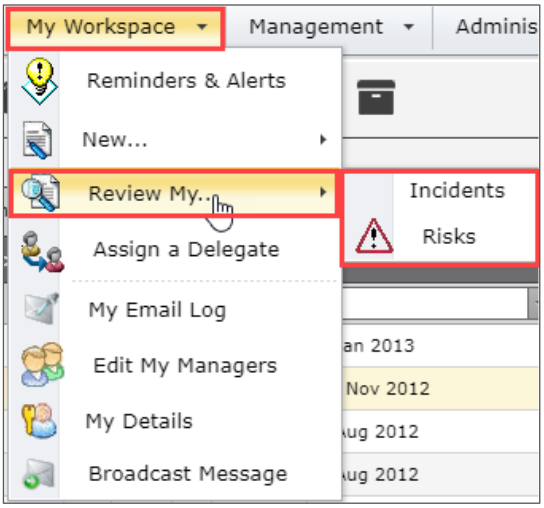


Depending upon the Register you are viewing and your user permissions, the number of available icons you see displayed will vary:

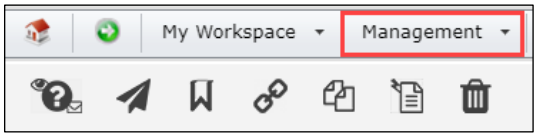
Icons available under "**My Workspace**" tab.



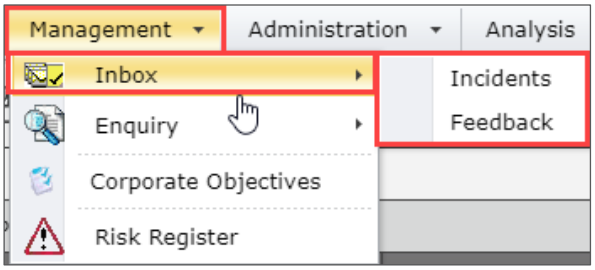
Review My > Incidents



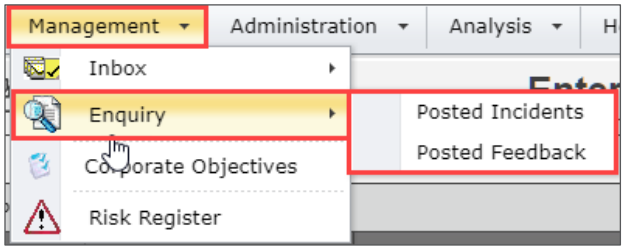
Icons available under the "**Management**" tab.



Inbox > Incidents



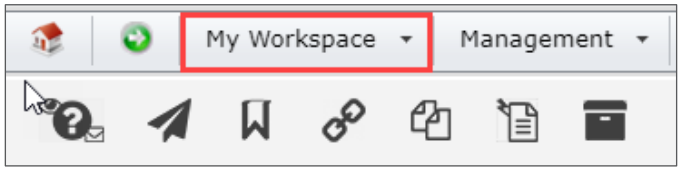
Enquiry > Posted Incidents



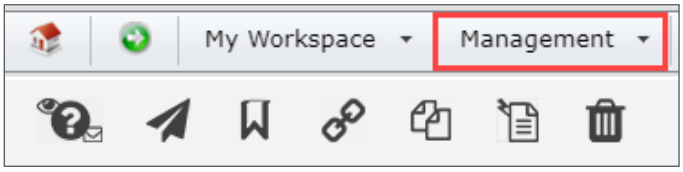
Selection state menu items

Below is a list of the Selection state menu items available in the My Workspace and Management lists.

My Workspace icons



Management icons



Icon Legend

This icon opens an info page that has descriptions of all the **Record Status** Icons displayed in the first column of the record lists.

Yellow closed envelope
A new item that has not yet been examined by an administrator.

Grey open envelope
An item that has been viewed, but not posted yet.

Three Yellow closed envelopes
An edit of an item, not yet viewed by an administrator, not previously posted.

Three Grey open envelopes
An edit of an item, has been viewed by an administrator, not previously posted.

Two red and one grey open envelope
An edit of an item, has been viewed by an administrator, there is a posted version.

Two red and one yellow closed envelope
An edit of an item, has been viewed by an administrator, there is a posted version.

Grey open envelope with a green check mark
A posted item.

Grey open envelope with a red x
A deleted item.

Green eye
An item that you have never viewed.

Red eye
An item you have previously viewed, but has since been updated. This may include Journal changes.

Grey eye
An item that has not changed since you last viewed it.

Distribution List
Allows you to distribute access of the selected record to other users.

Bookmark
Bookmarks the selected record. The bookmark will appear in your bookmark widget on your Homepage and in your Reminders & Alerts page.

Link Records
Allows you to link two or more records together because they are relevant to each other in some way.
Once you have selected a record, click this button to open the Linked Records dialog. From there you will be able to select records that you want to link together.

Clone & Link
Creates a new record based on an existing record. When submitted, those two records (the original and the clone) will be linked together.

Custom Functions
(Letter Builder or Bulk Assign Managers)
The Custom Functions allows you to access Letter Builder letters and/or the Bulk Assign Managers function.

Delete
Deletes the selected record/s. A record may also be restored, if necessary, and if you have permission to do so.

*Note: Archive is available only from the **Review My > Incidents** list*

Archive
This allows the user to mark a record as “Archived” and hides it from their **Review My > Incidents** list.

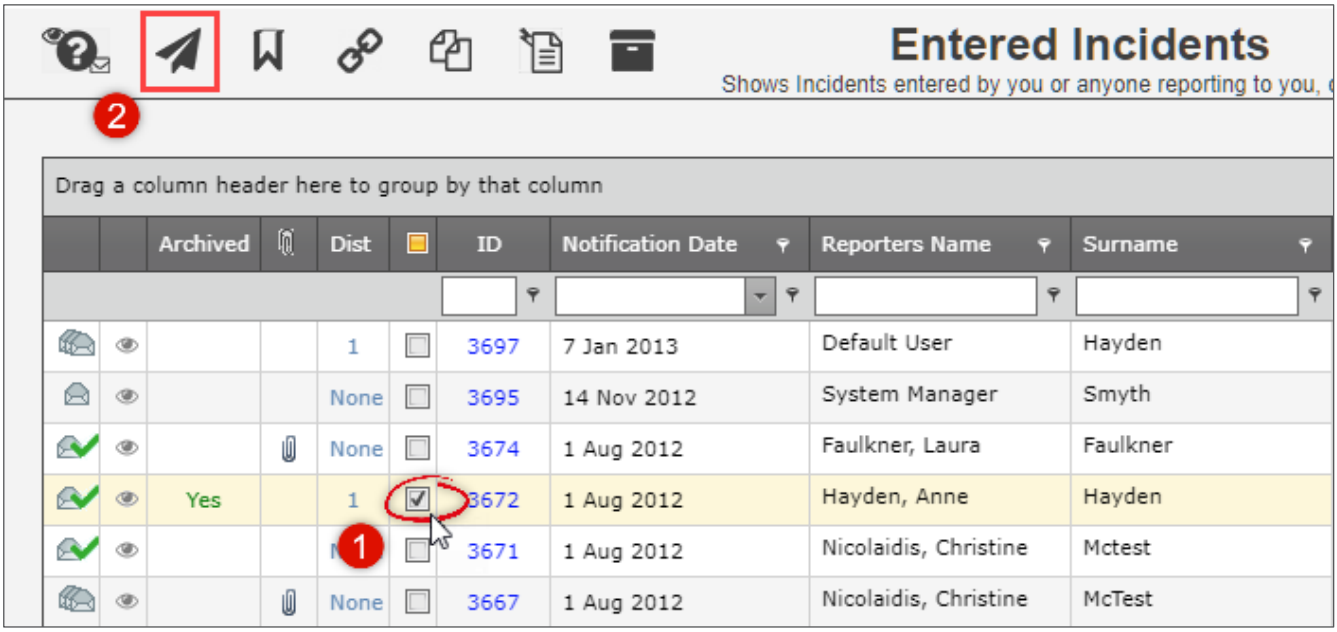
Using the selection state menu items

Distribution List

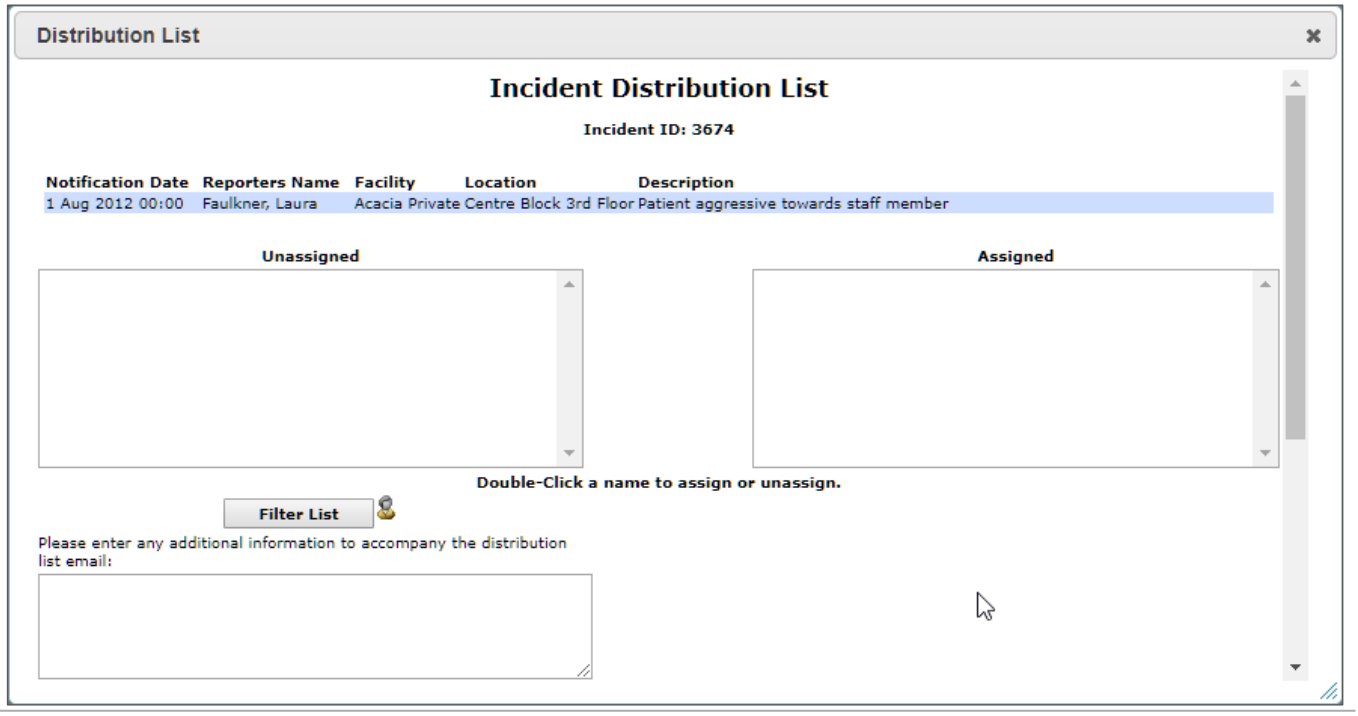
To add or remove users to or from a records Distribution List - do the following:

1. **Select the record -** From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column

2. **Open the Distribution List dialogue** – Click on the Distribution List icon in the Selection State Menu



Incident Distribution List – From the Distribution List window you can assign Riskman users to the chosen Incident's Distribution List.



To assign a user to the Distribution List do the following:

1. Click on the **Filter List** button in Distribution List window. This will open the **Select Users** window

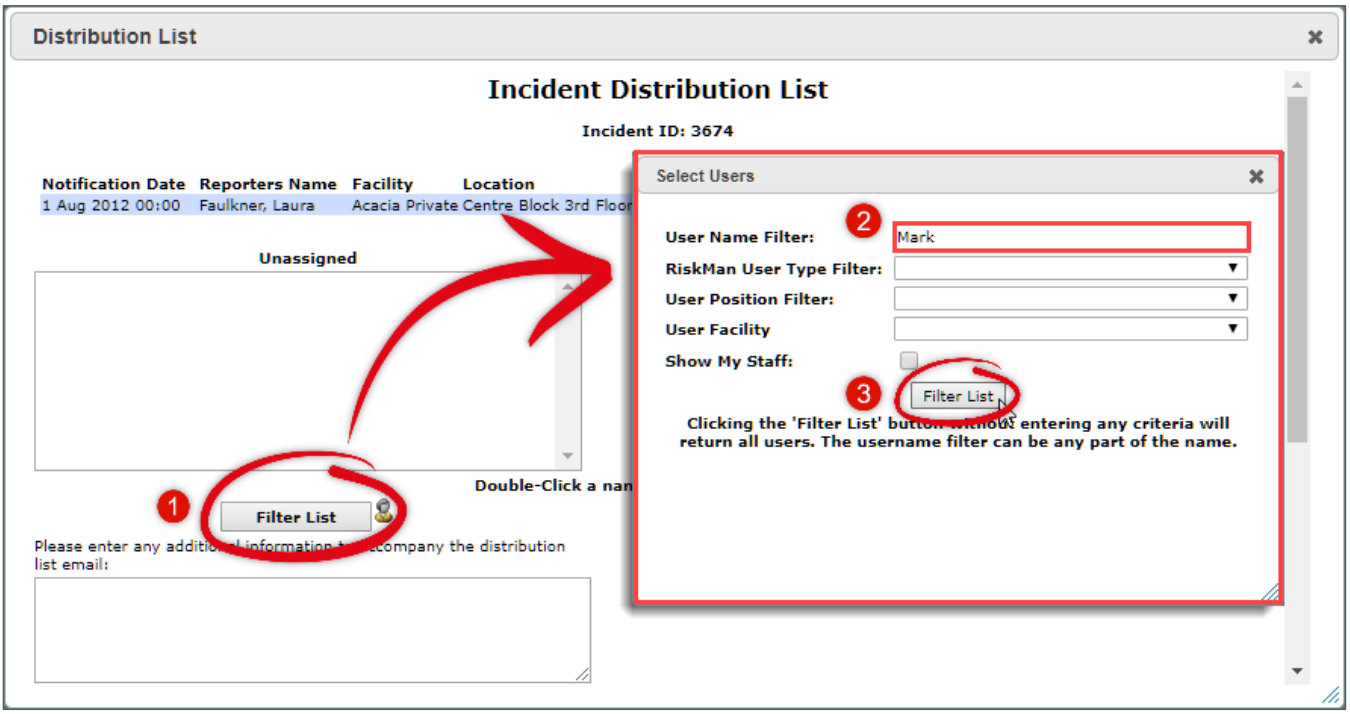
2. Type the name of the user you wish to assign

   Alternately you can use the drop-down lists to filter the users by:

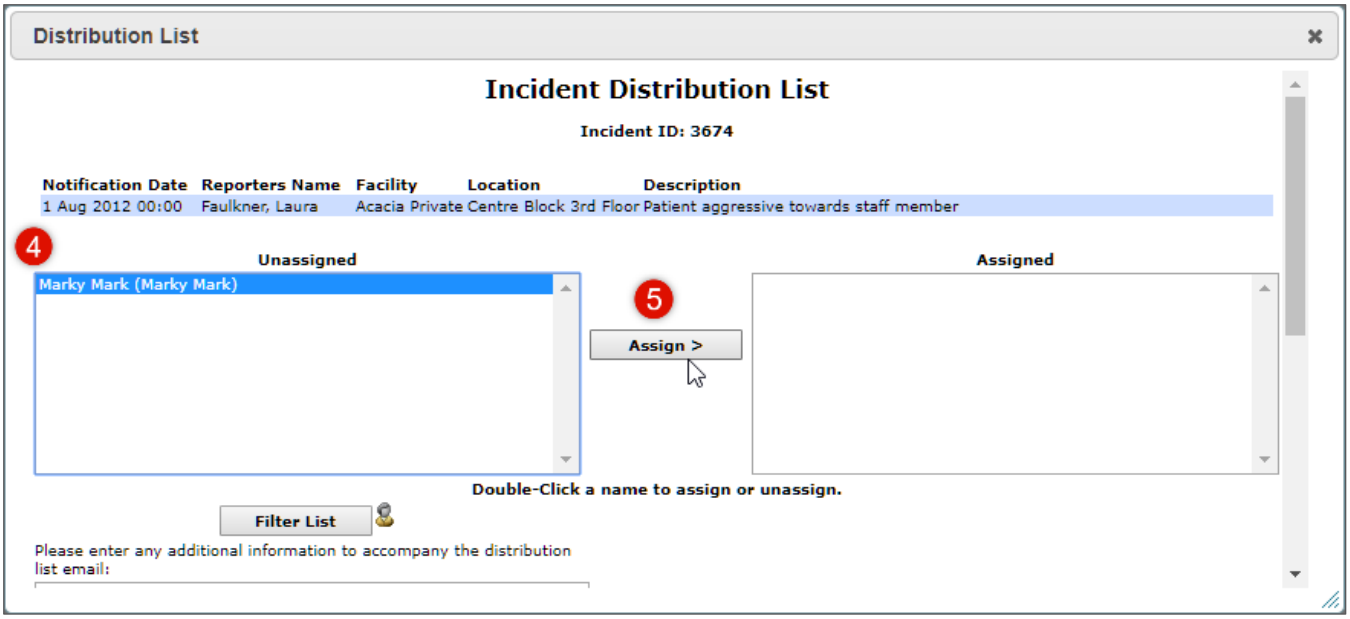
   - Riskman User Type
   - User Position
   - User Facility

   Note: The **Show My Staff** check box will filter a list of users that have been assigned to you in the Manager/Staff Module or your Organisation Structure register

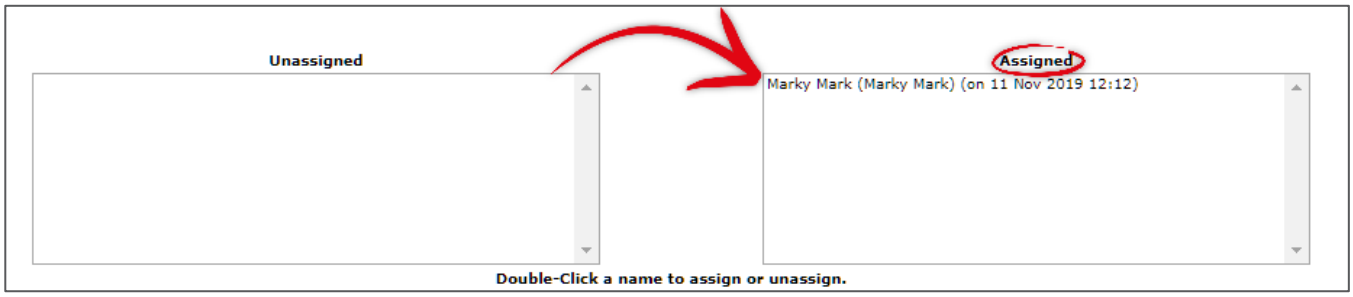
3. Click on the **Filter List** button on the **Select Users** window



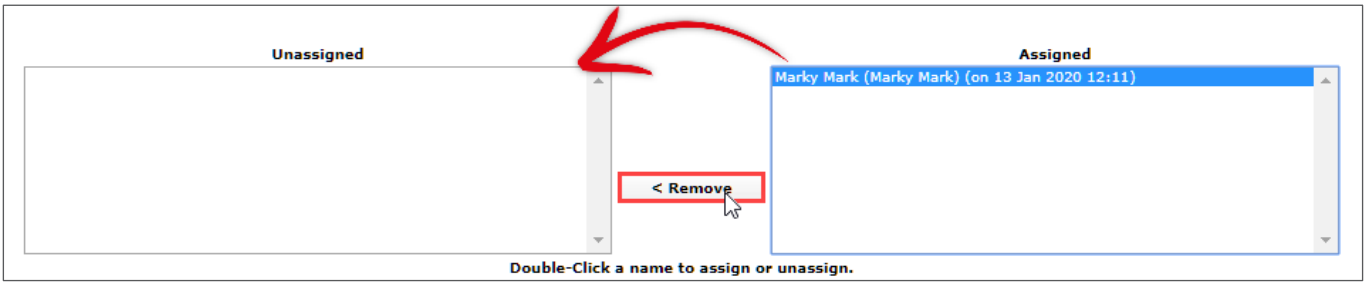
4. The name of the user will display in the **Unassigned** window on the left. Click on the name of the user you want to assign record access via the Distribution List
5. Click on the **Assign >** button.



The users name will move to the **Assigned window**



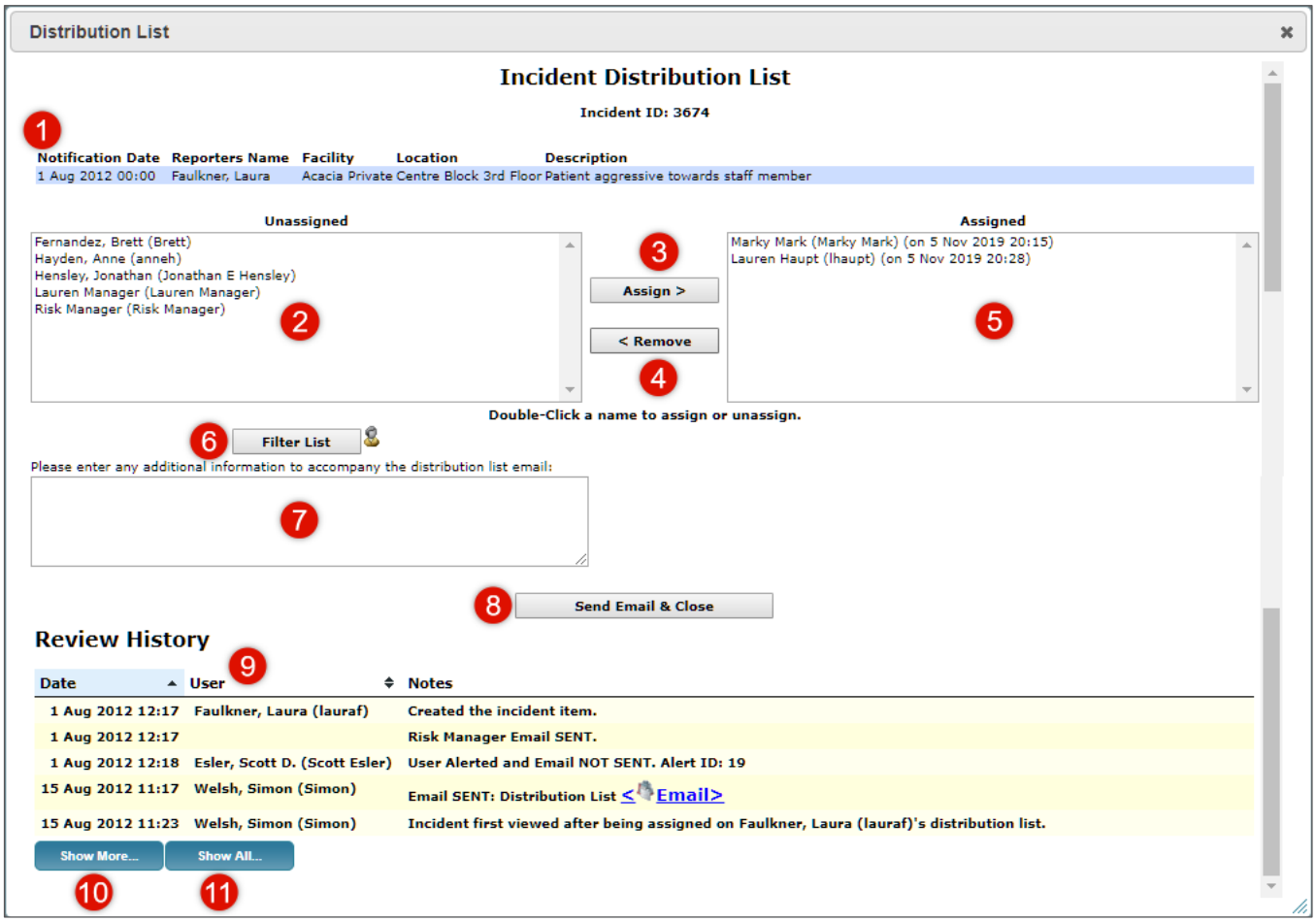
Once you have assigned a user to the Distribution List, you can manage the list by selecting the users and moving them from Unassigned list to the Assigned list and back.



Note: double-clicking on a name in a list will move it to the adjacent list.

Below is a diagram listing all the items found in the Distribution List dialogue.

1. **Incident Record details**
   Details of the Incident you are working on
2. **Unassigned Users list**
   A filtered list of users that are not yet assigned
3. **Assign button**
   Moves a user from the unassigned list to the assigned list
4. **Remove button**
   Moves a user form the assigned list to the unassigned list
5. **Assigned Users list**
   The list of all users assigned to the Distribution List
6. **Filter List button**
   Opens the Select Users search window
7. **Email message text box**
   Allows you to send a message to the assigned users
8. **Send email & Close button**
   Applies the Distribution List and sends email notification
9. **Incident record Review History**
   Gives you access to the Review History
10. **Show More… button**
    Expands the Review History window to display 10 entries.
11. **Show All… button**
    Expands the Review History window to show all entries



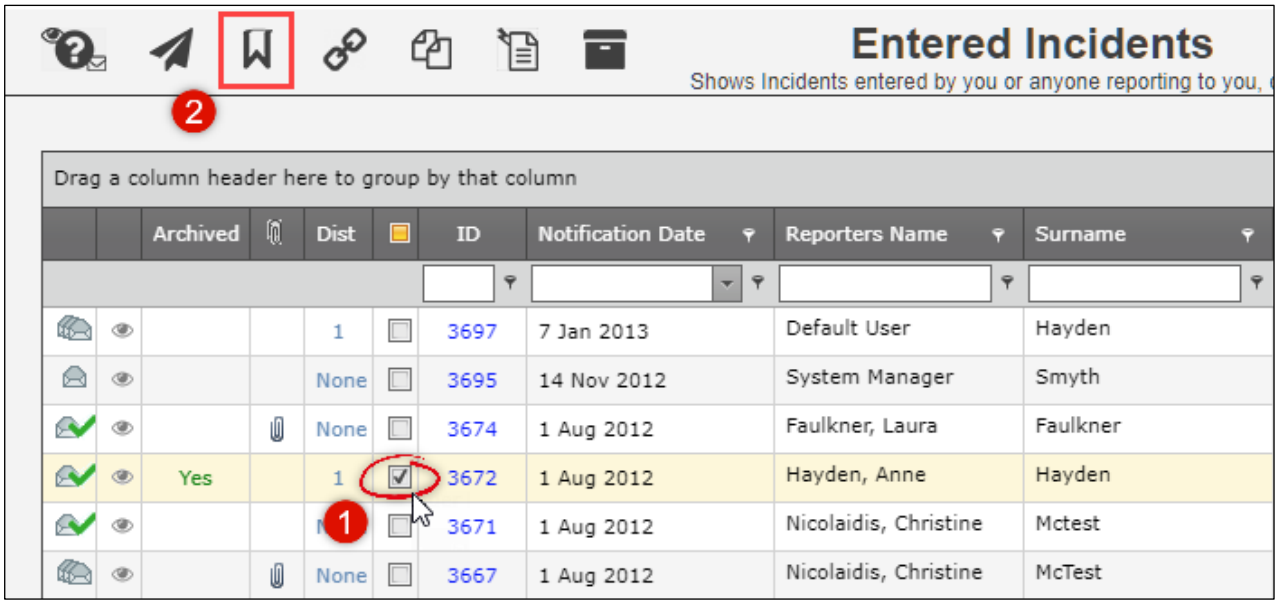
Bookmark

When you **Bookmark** a record, it will appear in the Bookmarked Records widget on the Homepage and in the Bookmarks tab in the Reminders & Alerts page (as pictured on the following page).

To Bookmark a record from any Register list, do the following:

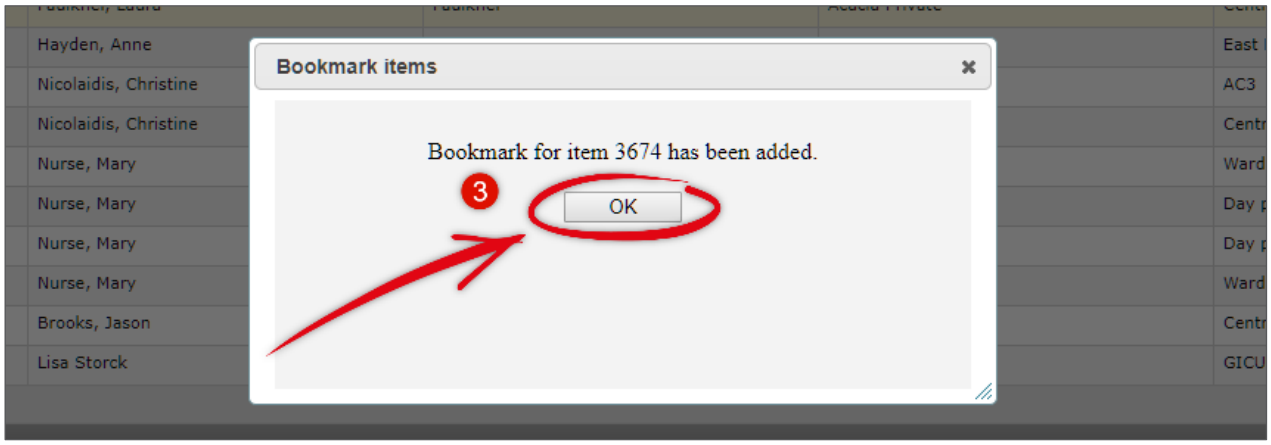
1. **Select the record -** From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column

2. **Bookmark the record** – Click on the Bookmark icon in the Selection State Menu



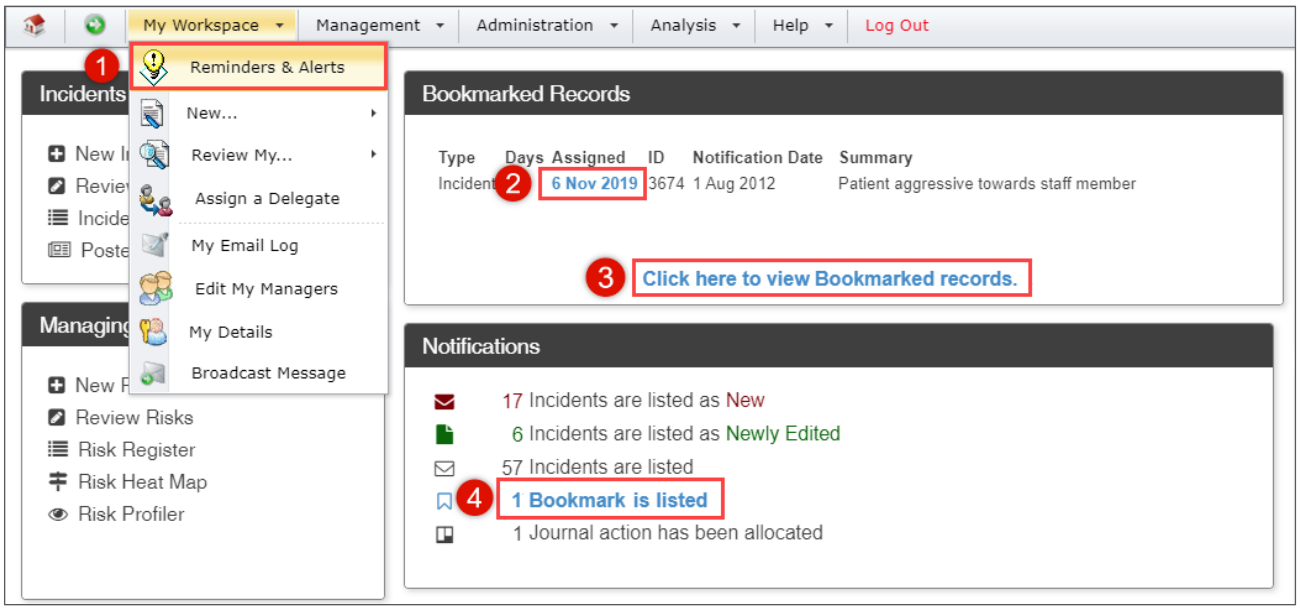
The Bookmark Items confirmation dialogue will be displayed.

3. **Bookmark items** – Click the **OK** button to confirm your choice



Accessing your Bookmarked items – From the **Homepage** there are four options allowing you to navigate to your Bookmarked items.

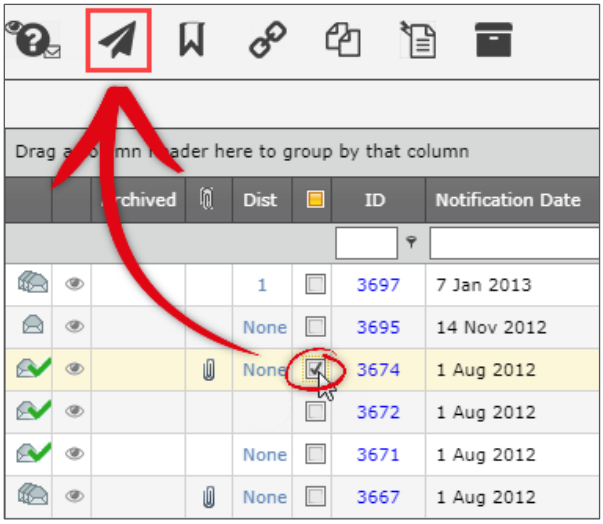
1. **Reminders & Alerts -** From the menu click on **My Workspace > Reminders & Alerts**
2. **Assigned Date (Direct link to the record)** From Bookmarked Records widget on the Homepage click on the Incident date. This will take you directly to the Incident record
3. **Bookmarked Records -** From Bookmarked Records widget on the Homepage click on the **Click here to view Bookmarked Records** link. This will open the Bookmarked Items page in Reminders & Alerts
4. **Notifications -** From Notifications widget on the Homepage click on the Bookmark link



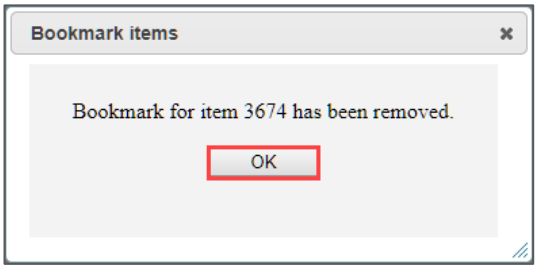
Removing a Bookmark – You can remove a Bookmark from a record by one of the two following methods.

Method 1

From a list select the record by clicking on the check box in the Selection State column.

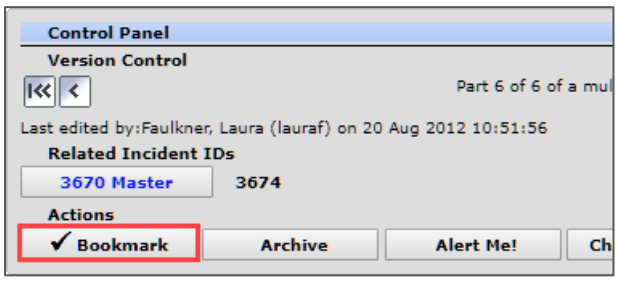


Click the Bookmark icon then click **OK** in the Bookmark Items dialogue window.

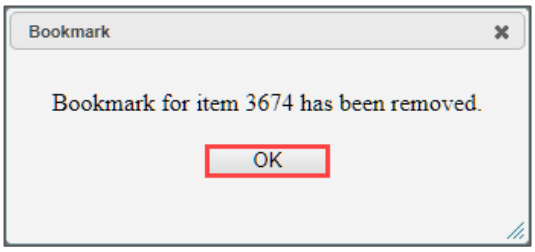


Method 2

Open the record and from the Control Panel click the **Bookmark** button



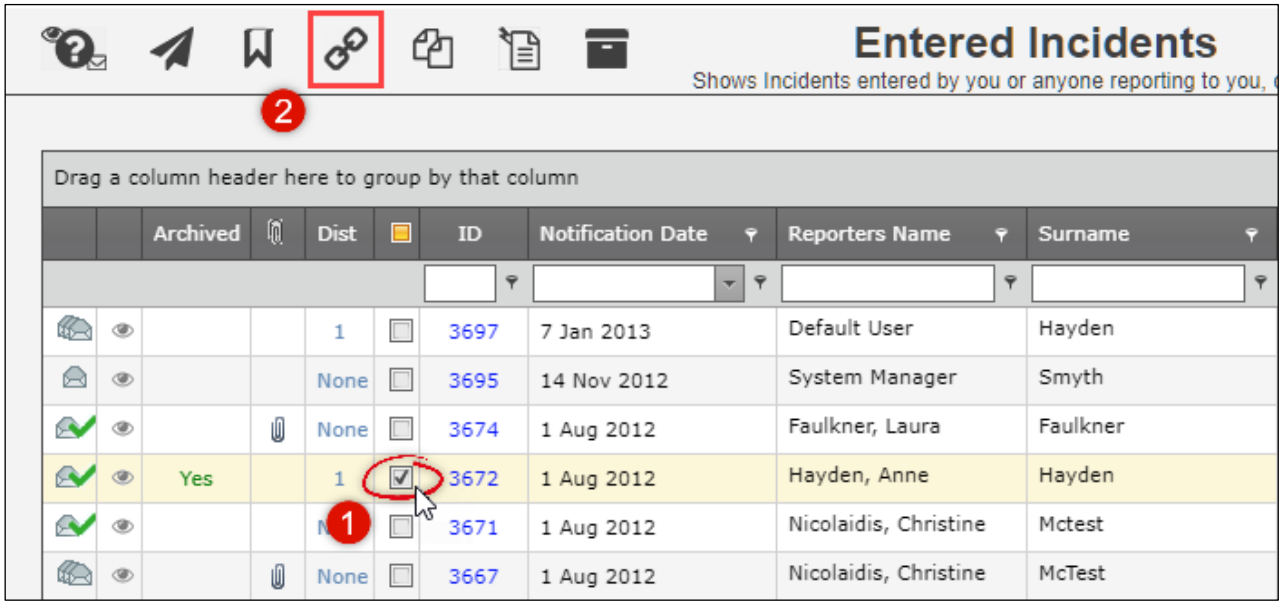
Click **OK** in the Bookmark Items dialogue window



Link Records

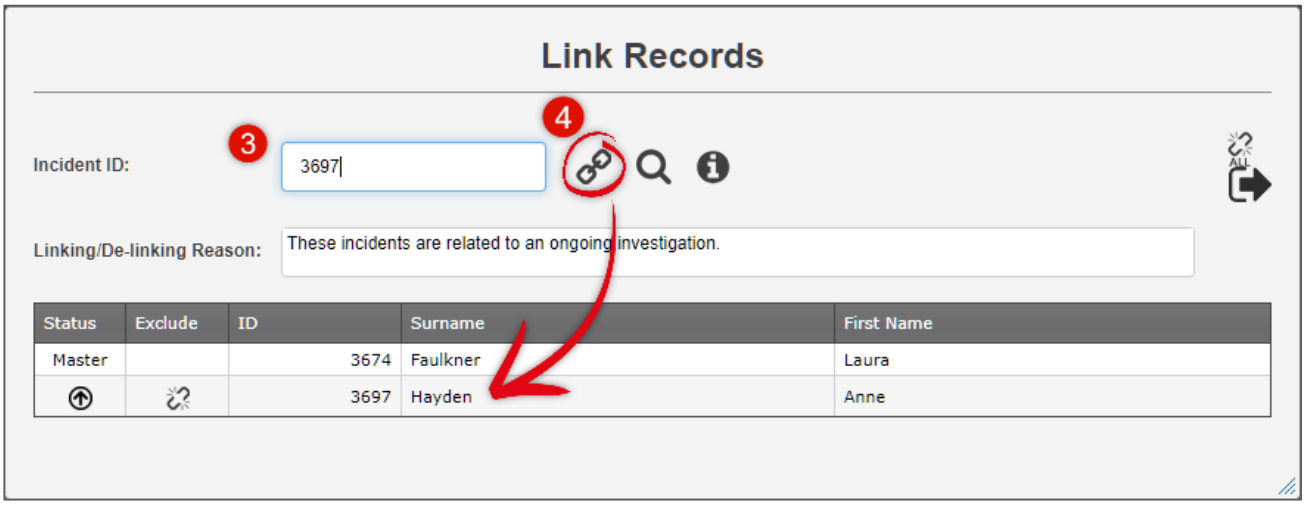
To Link two or more Incident records - do the following:

1. **Select the record -** From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to link by clicking on the check box in the Selection State column
2. **Open the Link Records dialogue** – Click on the Link Records icon in the Selection State Menu

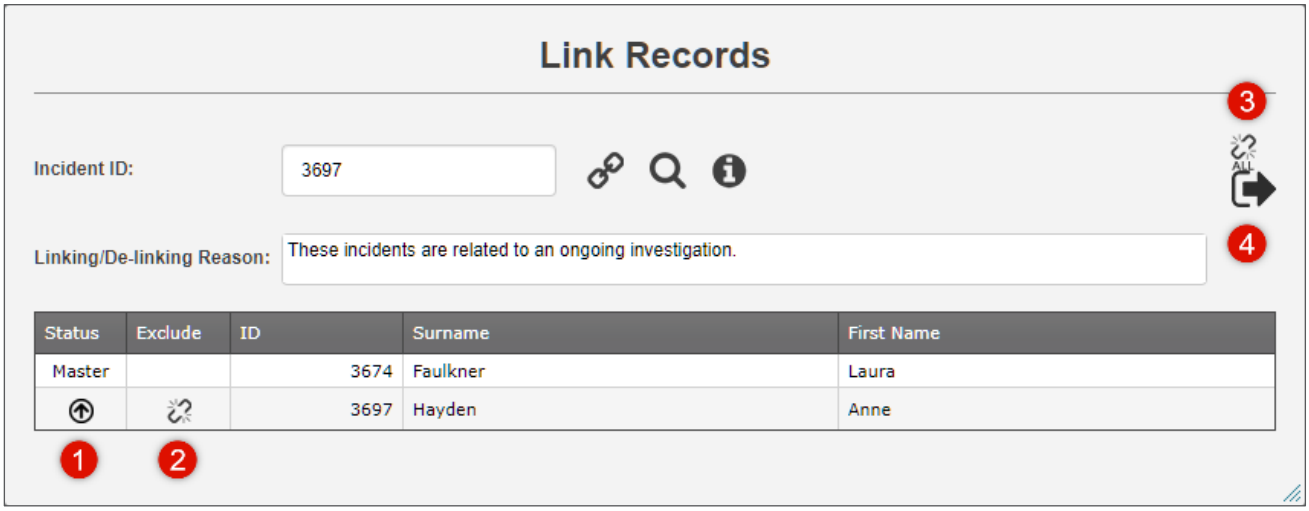


3. **Enter/Search –** Enter the Incident ID number that you want to link to the present record. Alternately, you can search for a record by clicking on the Search icon
4. **Link the records –** Click on the Add to Group icon. The Linking/De-linking Reason text field is for entering your reason for linking or de-linking the records. This field is optional

Note: The Linking /De-linking field must be enabled in Global Setting to have it appear in this window.



Other functions available in the Link Records window.



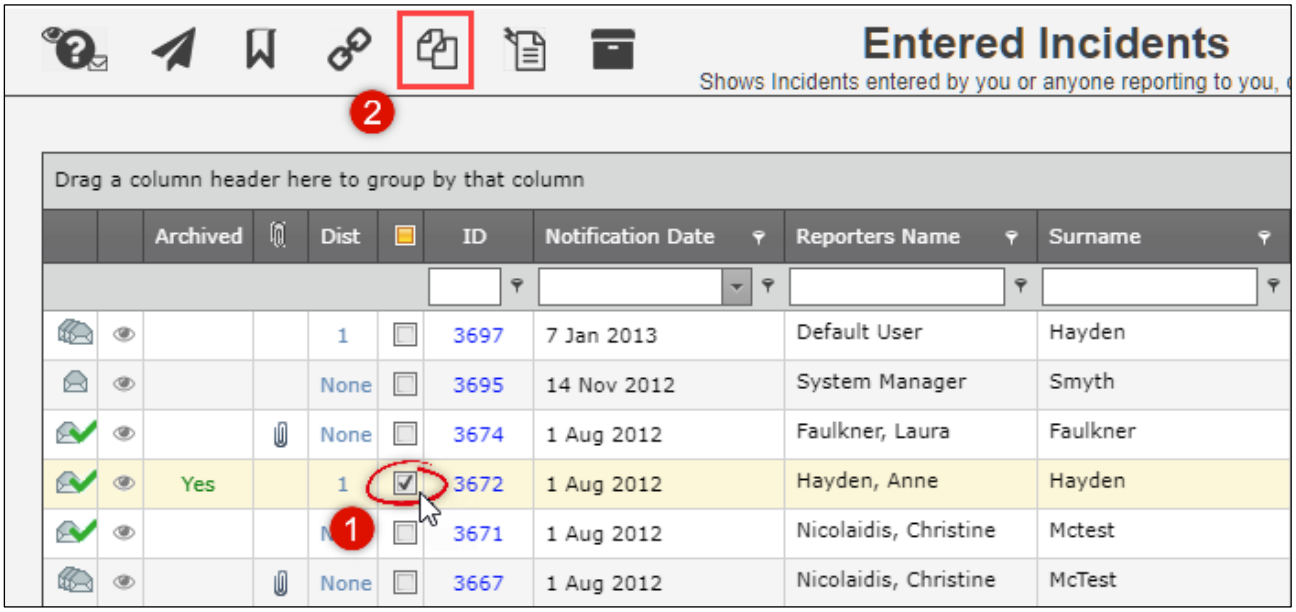
1		**Promote**	This will move the record up the list of linked items. Moving a record to the top of the list will make that record the "Master" record in the group
2		**Exclude**	This will remove the record from the group
3		**Dissolve Group**	This will dissolve the group completely removing ALL links
4		**Close**	This will close the Link Records window

Clone & Link

This will open a new Incident form based on an existing record and link it to the that record that it was cloned from.

1. **Select the record -** From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to Clone & Link by clicking on the check box in the Selection State column

2. **Create a Cloned record** – Click on the Clone & Link icon in the Selection State Menu



Cloned records will be based on the original record; however, they will not copy any personal information. For example; a cloned record will not contain First Name, Surname, Date of Birth, or Address.

Cloned records will be linked to the original “Master” record. This link to the Master record can be removed as described in the previous Link Records section.

Custom Functions

This icon give you access to one of three Custom functions.

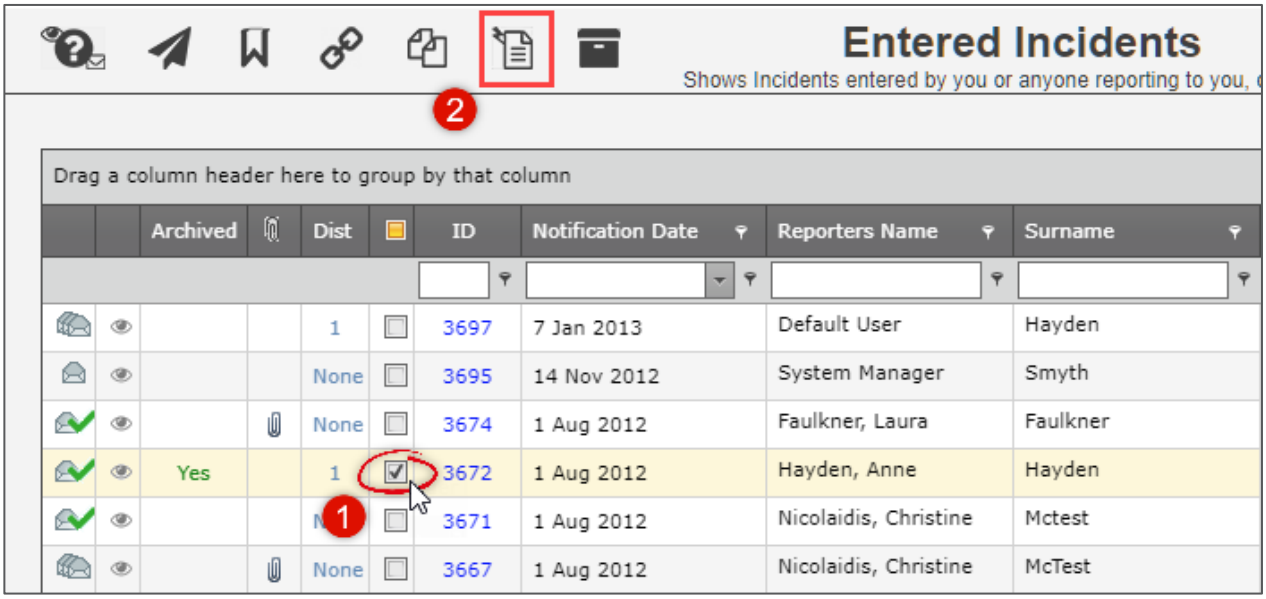
1. Letter Builder shortcuts
2. Health Legal Assign Managers or Risk Assign Managers
3. Bulk Update Records

Access to these functions is dependent on the registers in your system and your level of permission.

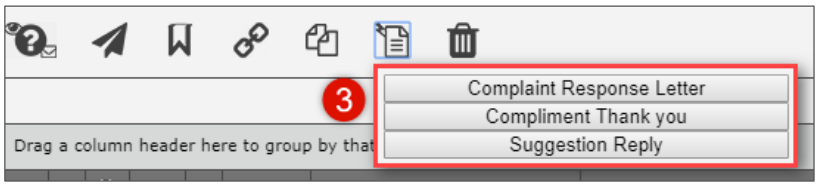
The Custom Functions button is not a default function, it must be added to the menu before it is available.

1. **Letter Builder** - From any Register List (the Entered Incidents List is used in this example) select the record that you want to apply a Letter Builder letter to by clicking on the check box in the Selection State column

2. **Print the Letter** – Click on the Custom Functions icon in the Selection State Menu

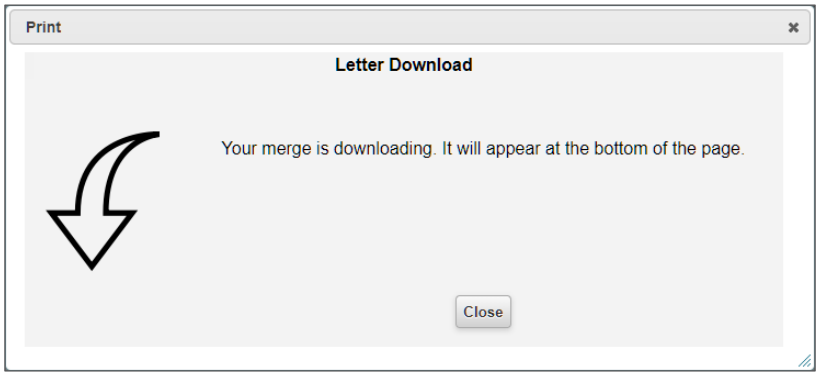


3. Select the letter you want to print from the list



The data merge will start and the Print dialogue will open.

For more information regarding the Letter Builder see the Letter Builder reference guide.

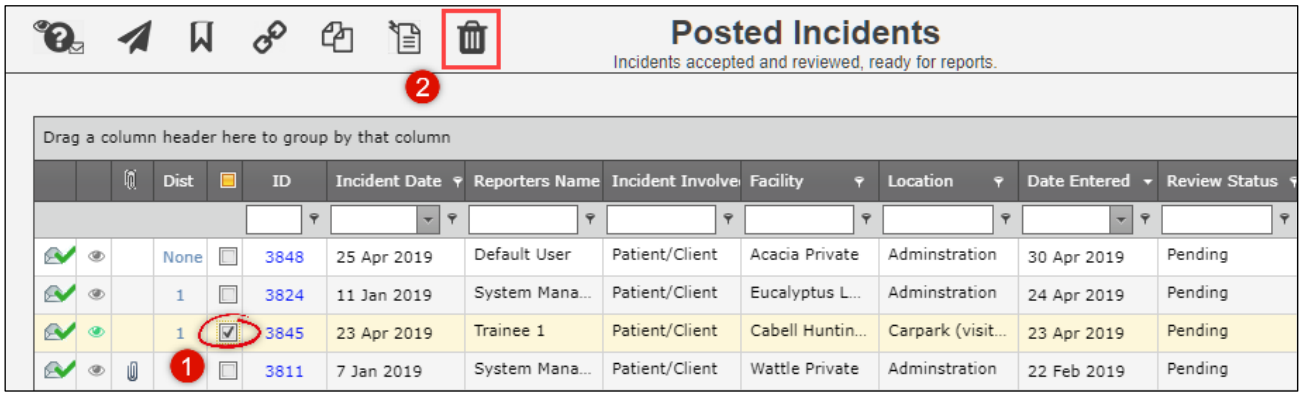


Delete

Records are never truly deleted in Riskman. They are “marked as deleted” in the register database and no longer visible in the Inbox or the Posted Incidents lists. To “delete” a record do the following:

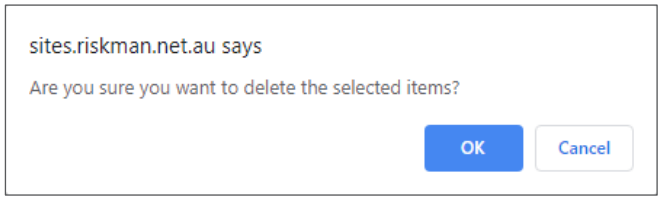
1. **Select the record -** From the Inbox or Enquiry Register List (the **Posted Incidents** List is used in this example) select the record that you want to Delete by clicking on the check box in the Selection State column

2. **Delete the record** – Click on the Delete icon in the Selection State Menu



A confirmation window will be displayed **Are you sure you want to delete the selected items?**

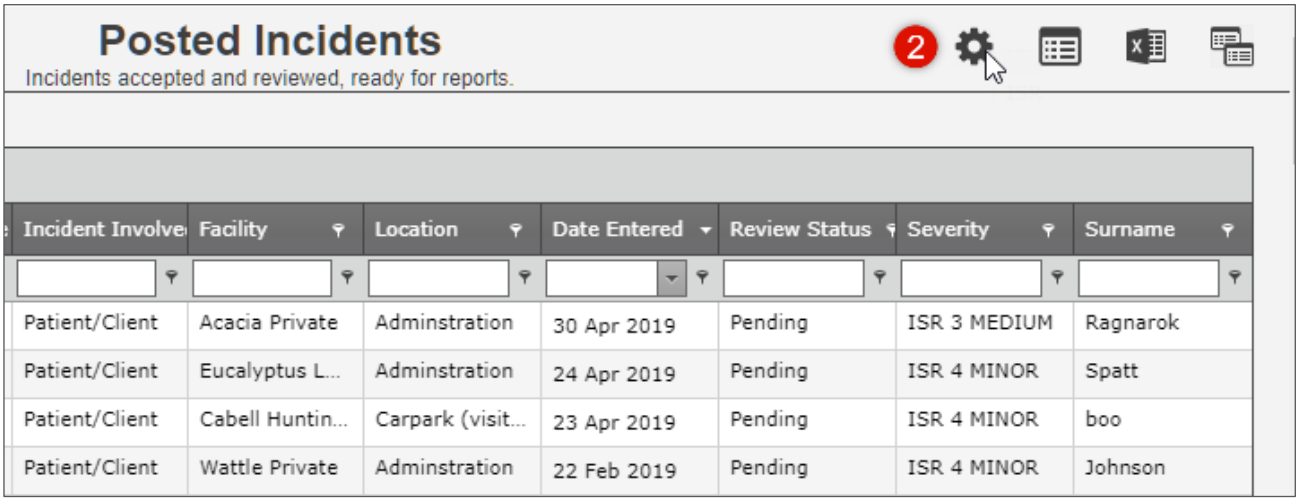
Click the **OK** button. The record will be marked as deleted and no longer visible.



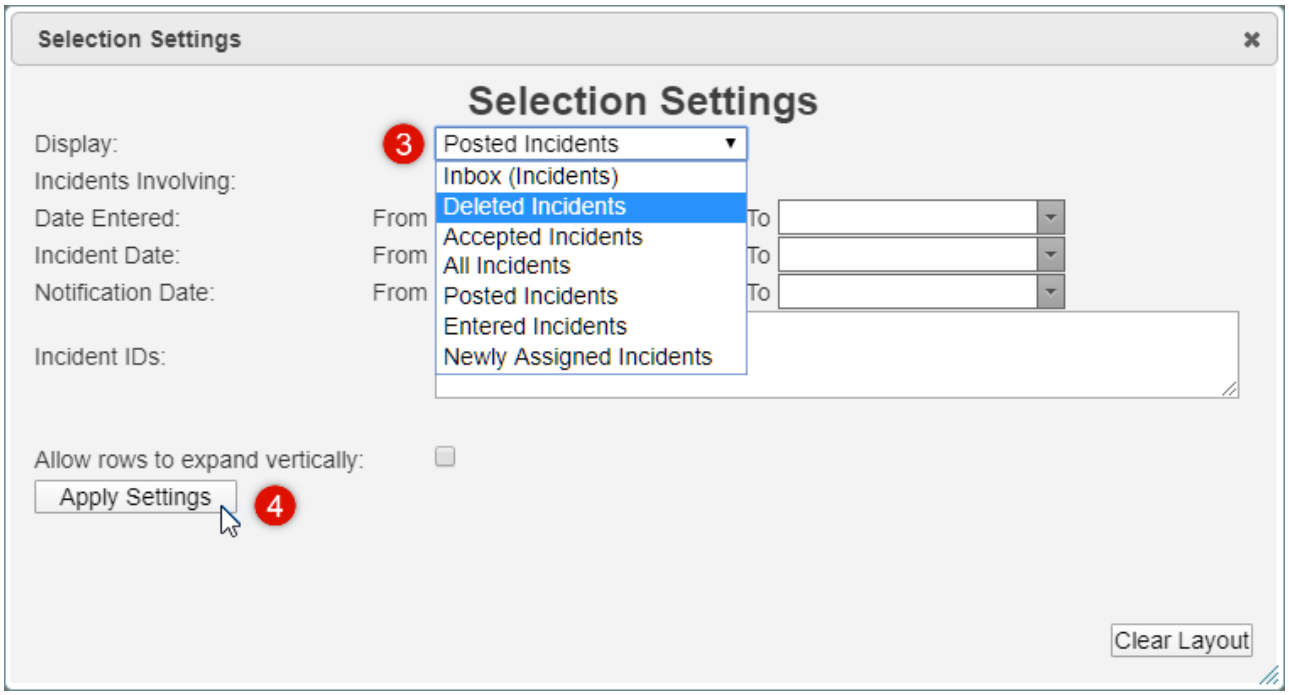
Undelete a Record

Once a record has been deleted from a list under the Management menu you will no longer see the record in the **Inbox** or the **Posted Incidents** lists.

1. To undelete a record, go to the **INBOX - Incidents for Review** or the **Posted Incidents** list
2. **Open Selection Settings –** Click on the cog icon to open the Selection Settings window

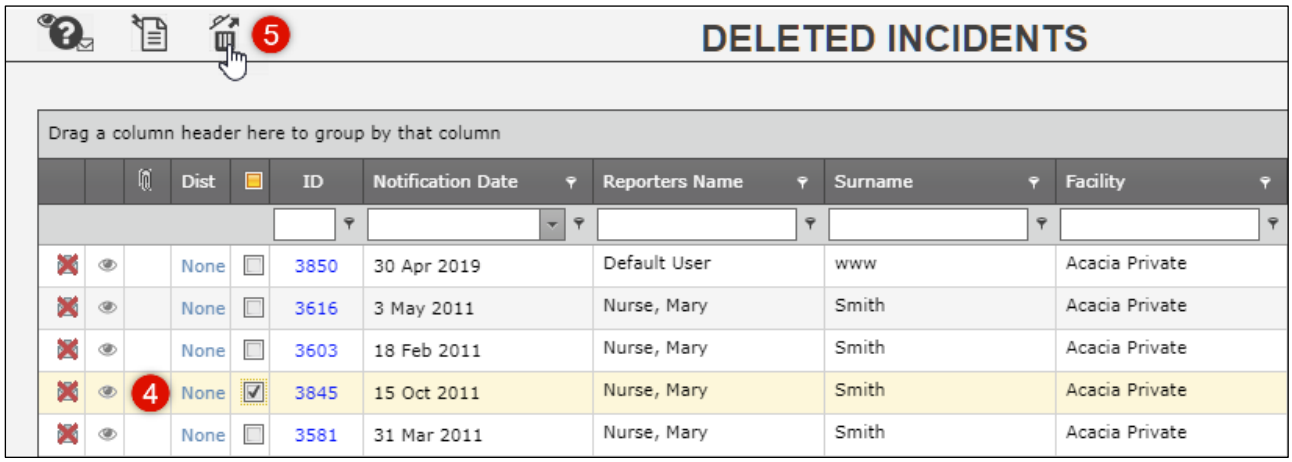


3. **Display Deleted Incidents** – Click the Display dropdown list and select **Deleted Incidents**
4. Then click on the **Apply Settings** button. All deleted records will be displayed in the **Deleted Incidents** list

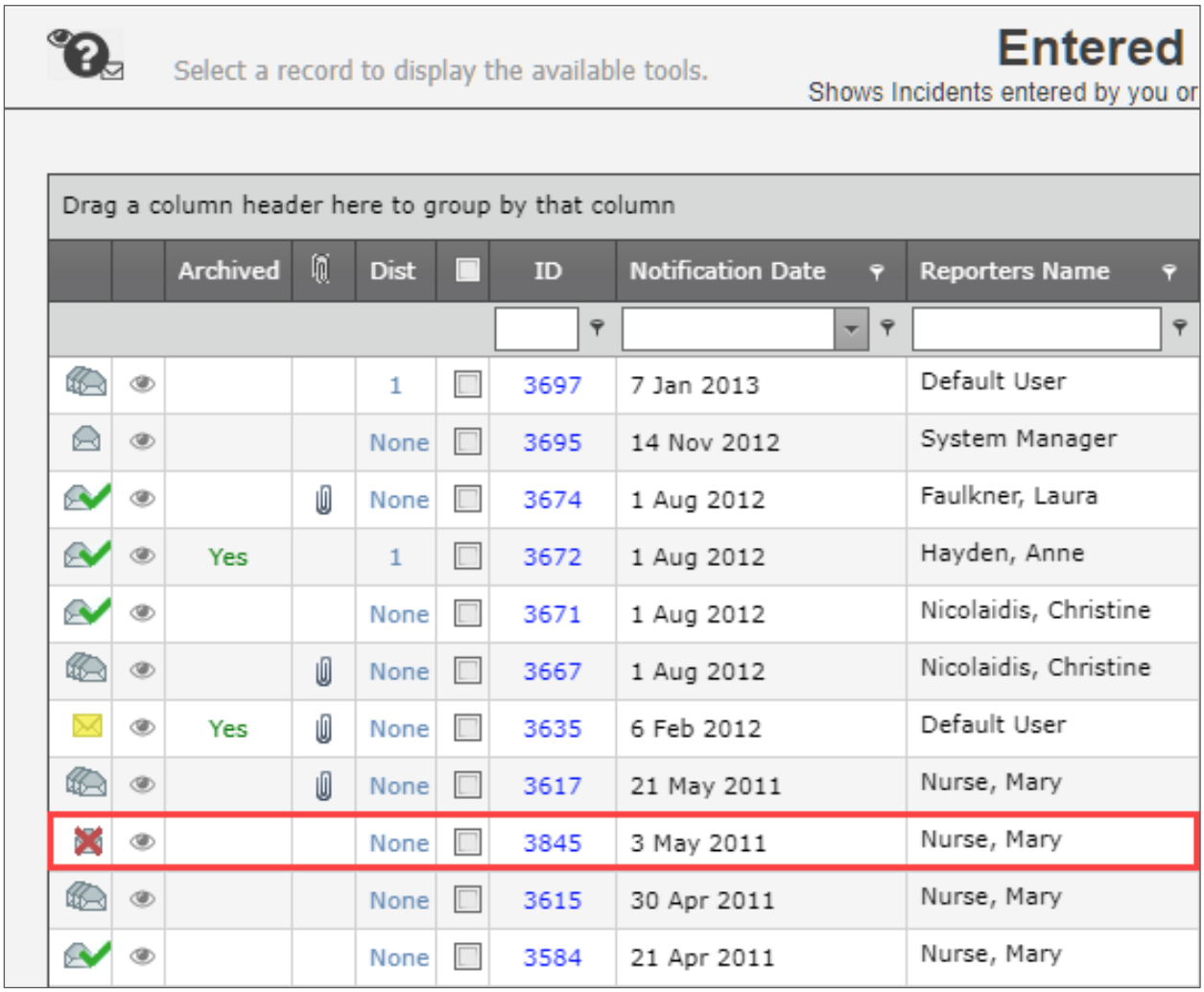


4 **Select the record -** From the **Deleted Incidents** List select the record that you want to restore by clicking on the check box in the Selection State column

5 **Restore the record** – Click on the Restore icon in the Selection State Menu. The record will now be visible in the **Inbox** or **Posted Incidents** Lists

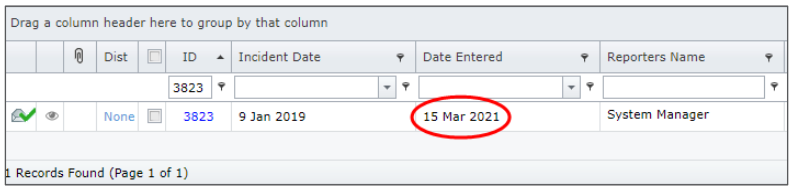


*Note: When a record is deleted the original reporter will still be able to see the Incident record in their **Review My -> Incidents** (Entered Incidents) list.*

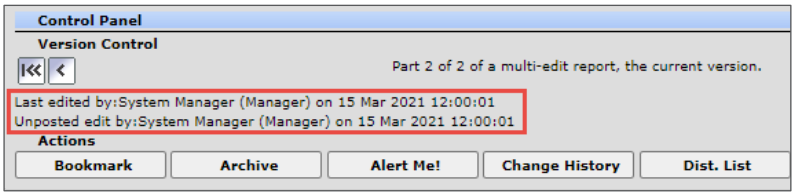


When a posted record that was deleted is restored the Date Entered field is updated

When a record is restored, the record virtual date is now updated to reflect the date the record is shown in the Post Incidents List Page.The date the record was restored is shown in the Date Entered column of the List page.



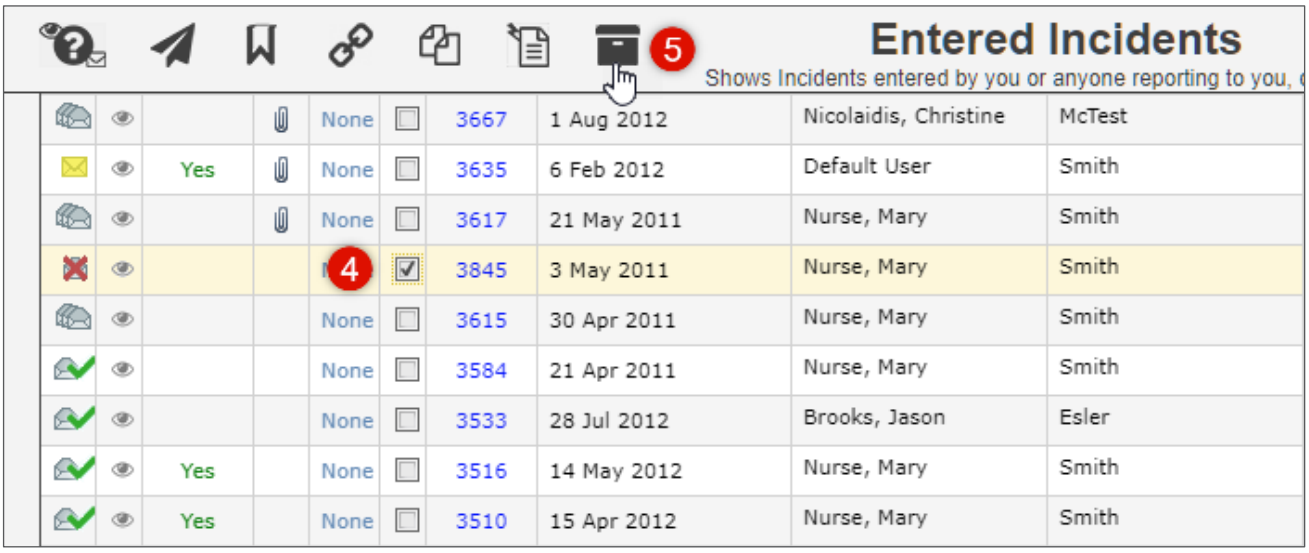
The Control Panel for the record shows the user who edited the record, in addition to the date and time. The Review History shows who undeleted the record. Once undeleted, the Alert system will recognise the record because the date entered has been reset to the date record was restored.



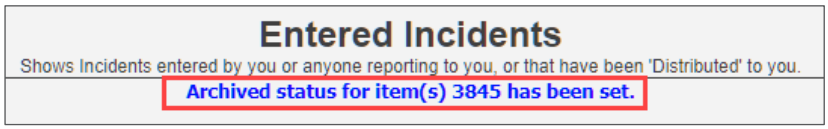
Archive

Incident records that are entered by users will appear in their **Entered Incidents** list. There may be times when a user does not want to see all of the incidents in their **Entered Incidents** list view. For example, when a user has completed all their required work in a record or when the record has been marked as deleted in the **Incidents for Review** or **Posted Incidents** lists. To **Archive** a record do the following:

1. **Select the record** - From the Entered Incidents List select the record that you want to Archive by clicking on the check box in the Selection State column.
2. **Archive the record** - Click on the Archive icon in the Selection State Menu.



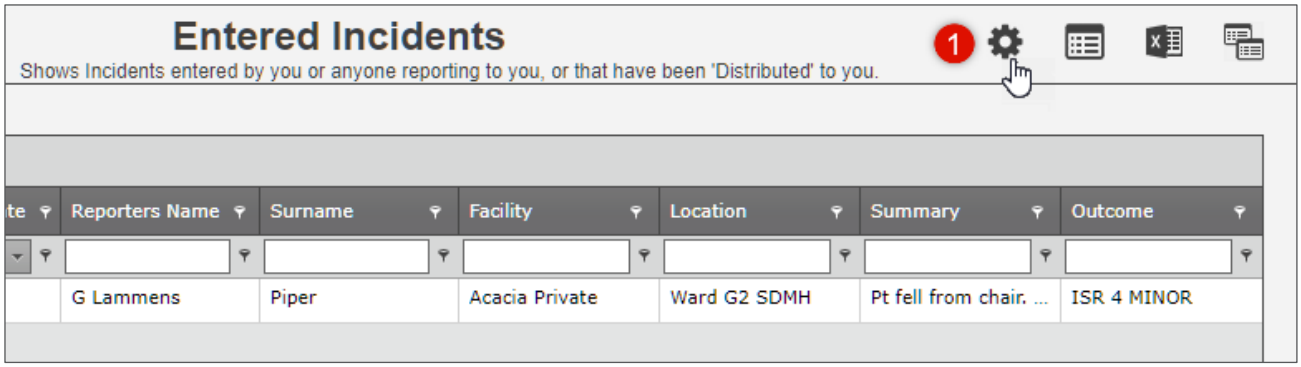
3 **Confirmation** – A confirmation message will be displayed under the Entered Incidents page title.



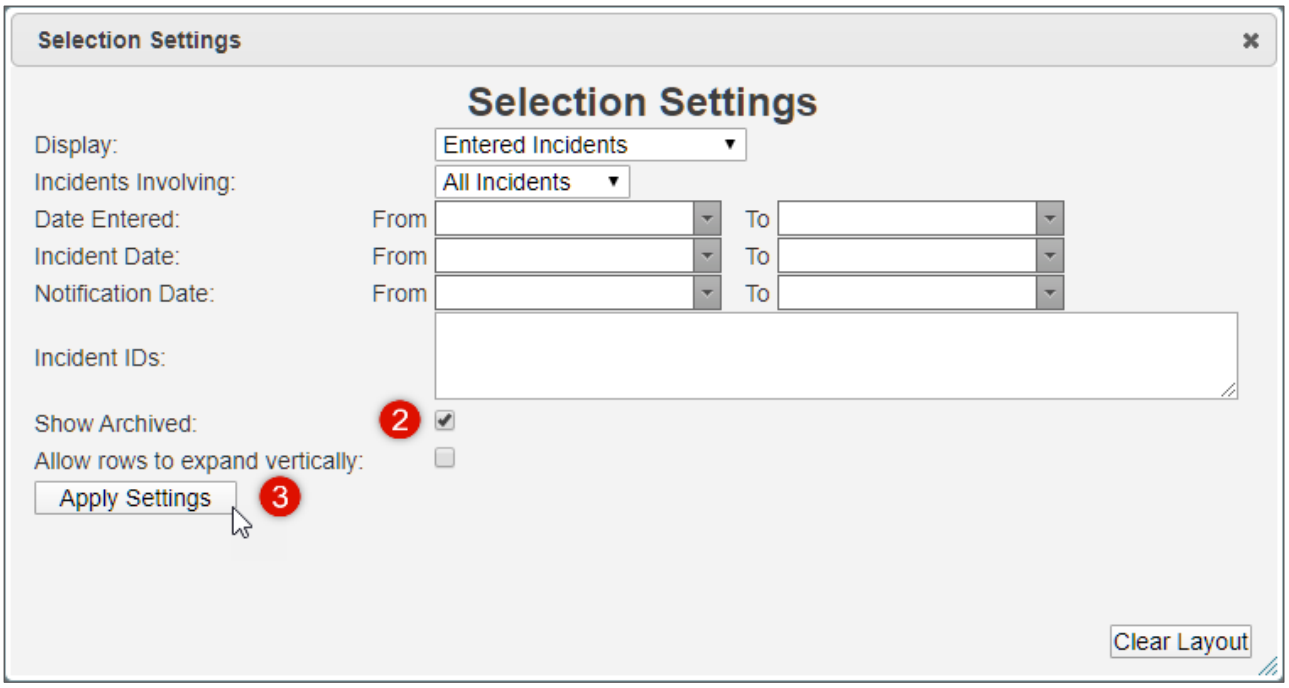
Restore an Archived Record

Once a record has been Archived from your Entered Incidents page under the My Workspace menu you will no longer see the record in the Entered Incidents page.

1. To restore the archived record, go to the **Entered Incidents** list.

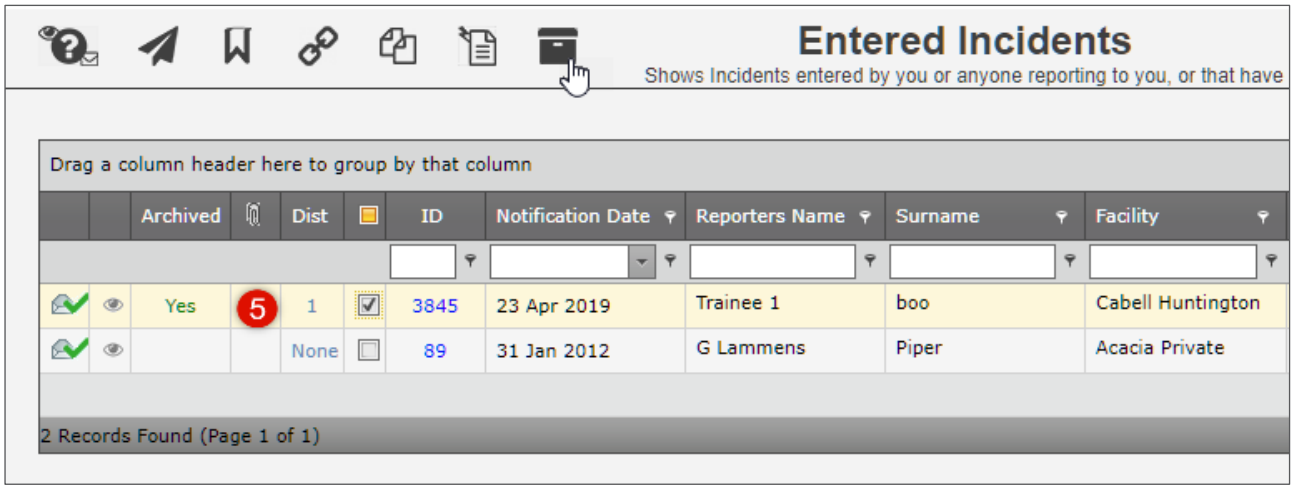


2. **Open Selection Settings –** Click on the cog icon to open the Selection Settings window
3. **Showed Archived** – Tick the checkbox next to Show Archived



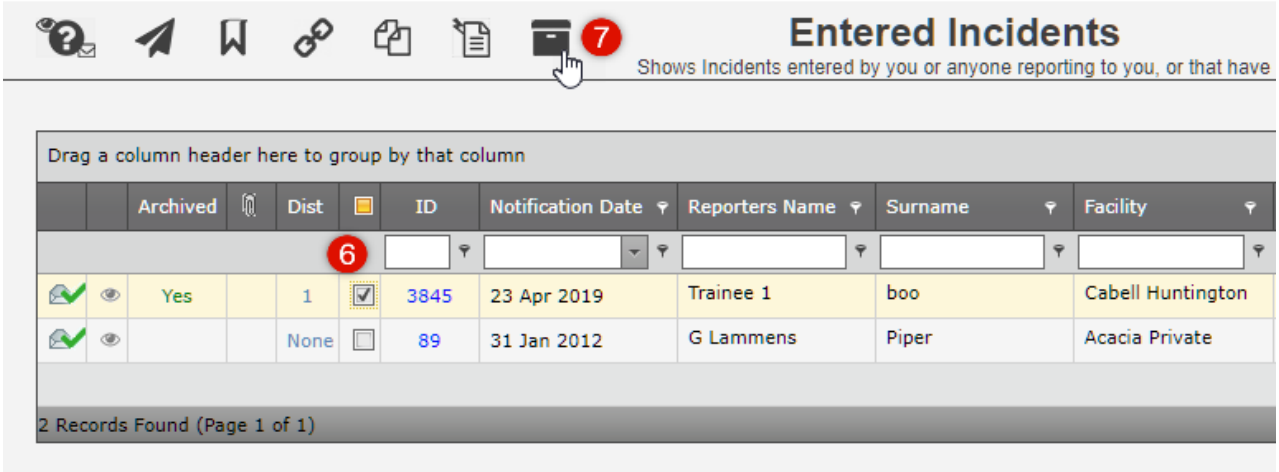
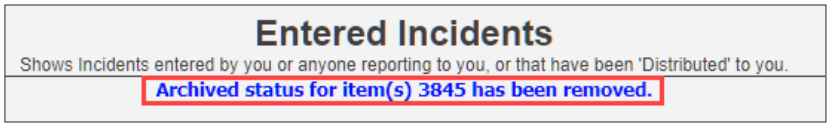
4. Then click on the **Apply Settings** button

5 **Archives Status** – The record you have recovered from the Archive will now be visible in your **Entered Incidents** list



6 **Select the record** – Put a tick in the checkbox to select the record that you want to recover

7 **Remove from Archive** – Click on the Archive icon in the selection state menu



8 **Confirmation** – A confirmation message will be displayed under the **Entered Incidents** page title informing you that the archived record has been restored. The record you have recovered from the Archive will now be visible in your **Entered Incidents** list