# - Working with Lists -

FOR RISKMAN VERSION 2109

Last reviewed September 2021

## **C RLDatix**™

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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

#### i) Note

This information in this guide applies to <u>any</u> 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:

	Э	Practic	cal Innovat	ive Risk I	Management			ining Site		TRAINING S	ITE				
	٢	N	1y Wor	kspac	e • Ma	nagement	<ul> <li>Administration</li> </ul>	• Reports • Hel	p • Log Out Feed	lback Module		USER: System Manager (Mana			
9	3	Sele	ct a re	cord t	o display	the availab	le tools.	5	INBOX - Inc New Incide	idents for Revie	W	6 🌣 🗉 🗷 🦷			
Drag	a col	lur	1 ade	here	to group l	by that colu	ımn			2					
	ID       Group       Incident Date       Incident Involved       Facility       Cocation       Outcome       Summary														
					٣	8	- 7	Ŷ	8	9	Ŷ				
	۲		None		<u>3389</u>		1 Jun 2012	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fell in shower			
	۲		None		<u>3474</u>	3480	3 Feb 2012	Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Split hot coffee and tomato sauce on clothing, 2nd degree burns.			
	۲	U	None		<u>3480</u>	Master	13 Jun 2012	Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt delivered incorrect dosage instructions on medication			
	۲	U	None		<u>3481</u>	Master	23 Jun 2012	Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Client became aggressive during meal time			
	۲		None		<u>3493</u>		29 Jan 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt adminstered extra dose of heparin not happy!			
	۲		None		<u>3497</u>		25 Feb 2012	Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SPECIMEN LOST AFTER COLLECTION			
	۲		None		<u>3536</u>	3531	25 Jul 2012	Volunteer	Acacia Private	Centre Block 1st Floor	ISR 4 MINOR	Pt administered extra dose of panadol			
	۲		None		<u>3537</u>		5 Aug 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 2 HIGH	Client became aggressive during theatre transfer because staff			
	۲		None		<u>3545</u>		15 Sep 2012	Client	Acacia Private	Centre Block 7th Floor	ISR 3 MEDIUM	Pressure wound degrading to Grade 2 status			
	۲		1		<u>3572</u>		3 Feb 2011	Client	Acacia Private	Centre Block 7th Floor	ISR 2 HIGH	ABO Blood Incompatibly during transfusion			
	۲		None		<u>3573</u>		1 Feb 2011	Relative/Visitor	Acacia Private	Emergency Department	ISR 5 NEAR MISS	Visitor entered ED in an intoxicated state and abused staff			
	۲		None		<u>3574</u>		3 Feb 2012	Staff Member	Acacia Private	Cardiac Rehab	ISR 4 MINOR	Staff member hurt back lifting patient from bed to chair			
	۲		None		<u>3581</u>		31 Mar 2011	Client	Acacia Private	East Block 1st Floor	ISR 4 MINOR	Pt fell in shower			
	۲		None		<u>3582</u>		1 Apr 2011	Client	Acacia Private	Patients Home	ISR 4 MINOR	Client became aggressive during home visit			
	۲		None		<u>3583</u>	3576	23 Feb 2011	Client	Acacia Private	GICU	ISR 4 MINOR	Client became aggressive in reception - assaulted staff member			
_															

- You cannot modify these columns; they will always be displayed as-is.
- 2 Columns that you can change: Column order, widths, show/hide, etc
- **8** Pagination info: Total records and page count
- Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page
- Toolbar: When you select a record, the available functions/options for working with that record appear here
- **6** Toolbar: Options for configuring and working with your list overall

### The fixed columns: Explanation

- "Administrative" status of the record. Click the icon for more information.
- 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.
- The paperclip tells you there is at least 1 document attached to the record
- Oist 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.
- **6** Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.
- ID number: Click on the record's ID number to open it. Note that you <u>do not</u> need to check the record's selection box before clicking the ID number!

1	2	3	4	5	6
Ĩ		ŋ	Dist		ID 🔺
					٣
$\bowtie$	۲		None		<u>3389</u>
	۲		None		<u>3474</u>
	۲	Ű	None		<u>3480</u>
	۲	U	1		<u>3481</u>
	۲		None		<u>3493</u>

### **MODIFYING YOUR LIST**

### Changing the columns shown on your page

Essentials

Click the Change Columns icon in the



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

nange C	olumns	6
	Change Columns	Cancel Save
This p	uld like to see on your Incidents page. 🔞 Display 'Advanced' Columns 🗌	
#	Field Label	Sort Order
6	3	4
	Incident Date	1
<b>V</b>	Incident Involved	4
<b>V</b>	Location	5
	Summary	6
<b>V</b>	Outcome	7
<b>V</b>	Facility	9999
	24 Hrs prior to Patient in	9999
	A.C.D. Completed After MET	9999
	A.C.D. Prior	9999
	A.C.D. Suggested	9999
	Activity At The Time	9999
	Acute Illness	9999

- 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
- **6** Can't find what you're after? Start typing a field name here to search the list
- 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
- Click the **Save** button once you're done. Your list will refresh, and the columns you selected will be displayed.

## 

#### Extras

#	Field Label
$\backslash$	
	ncident Date
•	Incident Affected ×
	Location

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.

Cha	inge	Columns					×			
			Change Colun	nns [	Cancel	ncel Save				
_	Thi	s page allows you to choose which	columns of informati	ion you would like to s	ee on your Incide Display 'Advanced	ents page. 🔞 l' Columns 🗹	_			
	#	Field Label	Sort Order	Field Name	Field T	ype				
	1	Incident Date	1	IncidentDate	Incider	nt				
	1	Incident Involved	4	IncidentInvolved	Incider	nt				
	7	Location	5	Incident_Location	Incider	nt				
	<b>V</b>	Summary	6	Description	Incider	nt				
	1	Outcome	7	Outcome	Incider	nt				
	<b>V</b>	Facility	9999	Site	Incider	nt				

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.

1					2						
Incident Involved 💌	Facility 💌	Location	Outcome		Incident Involved 💌	Facility 💌	Location	-	Outcome	•	S
♥	♥				Ŷ	♥		7		٣	
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor		ISB 2 HIGH		Fe
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp	Staff Member	Eucalyptus Lodge	Cafeteria		ISR 4 MINOR		Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt	Intervention	Acacia Private	mayton -		ISR 4 MINOR		Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli	Client	Eucalyptus Lodge	Community Health Centre	•	ISR 1 SEVERE		Cl
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt	Client	Acacia Private	Centre Block 4th Floor		ISR 3 MEDIUM		Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP	Client	Acacia Private	Day procedure unit		ISR 3 MEDIUM		SF
3	÷				4						
Incident Inv Outcome	Facility 🔽 💌	Location 💌	Outcome 🔽	Su	Incident Involved 💌	Outcome 💌	Facility 🔽	Locatio	n	-	S
<b>v</b> 1	°	♥	♥		Ŷ	<b>X</b>	8			٣	C
Patient/Client	Euran, tus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel	Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre	Block 7th Floor		F
Staff Member	Eu al, otus Lodge	Cafeteria	ISR 4 MINOR	Sp	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeter	ia		S
Intervention	Acacia Privete	Dayton	ISR 4 MINOR	Pt	Intervention	ISR 4 MINOR	Acacia Private	Dayton			Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli	Client	ISR 1 SEVERE	Eucalyptus Lodge	Commu	inity Health Centre		C
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt	Client	ISR 3 MEDIUM	Acacia Private	Centre	Block 4th Floor		Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP	Client	ISR 3 MEDIUM	Acacia Private	Day pro	ocedure unit		SI

### 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  $\overleftarrow{\mathbf{H}}$  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.

ID	Incident Date 👻 🔽	Incident Involved
٣	<b>\</b> ?	♥
<u>3757</u>	12 Jan 2015	Patient/Client
<u>3752</u>	9 Dec 2014	Patient/Client
<u>3742</u>	28 Nov 2014	Patient/Client
<u>3735</u>	28 Nov 2014	Patient/Client



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Summar

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shower	

USER: System Manager (Manager)

III ×∃

P.

### 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:

q	9	Z Se	lect a	record	to dis	play the	available tools.		INBOX - Incidents for Review New Incidents and edits of Incidents												
	Out	tcome 🖌	•																		
			Ø	Dist		ID	Incident Date	• •	Incident Involved	Facility	-	Group	Location	-	Summary						
								• 🕈	♥		٣	9		٣							
e		Outcom	e: ISR	1 SEVE	RE																
		🏝 👁 🞚 None 🗌 <u>3481</u>				<u>3481</u>	23 Jun 2012		Client	Eucalyptus Lodge		Master	Community Health Centre		Client became aggressive during n						
0		Outcome: ISR 2 HIGH																			
	r.	<u>(</u>		None		<u>3537</u>	5 Aug 2012		Client	Acacia Private			Centre Block 4th Floor		Client became aggressive during t						
		<b>(</b>	Ú	None		<u>3667</u>	1 Aug 2012		Patient/Client	Acacia Private			Centre Block 2nd Floor		Pt fell from bed and fractured fem						
		۲		None		<u>3389</u>	1 Jun 2012		Patient/Client	Eucalyptus Lodge			Centre Block 7th Floor		Fell in shower						
		6		1		<u>3572</u>	3 Feb 2011		Client	Acacia Private			Centre Block 7th Floor		ABO Blood Incompatibly during tra						
6		Outcom	e: ISR	3 MEDI	UM																
	T			None		<u>3752</u>	9 Dec 2014		Patient/Client	Acacia Private			ACAS		Gonna make a few changes						
		۰		None         3742         28 Nov 2014         Patient/Clier		Patient/Client	Acacia Private		Master	Cafeteria		Stained a red dress									
		۰ 🖾	None San 3704 12 Mar 2013 Patient/Client		Patient/Client	Acacia Private			Centre Block 5th Floor		Resident fall in home on lino floori										
						<u>3545</u>	15 Sep 2012		Client	Acacia Private			Centre Block 7th Floor		Pressure wound degrading to Grad						
				None		<u>3497</u>	25 Feb 2012		Client	Acacia Private			Day procedure unit		SPECIMEN LOST AFTER COLLECT						

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**:

Drag	) a co	olumn	header	r here	e to gro	up t	by that column				
		ŋ	Dist		ID		Incident Date	• •	Incident Involved	Outcome	-
						Ŷ		• 9	5		9
	۲		None		<u>3757</u>	2	12 Jan 2015		Patient/Client	ISR 4 MINOR	

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.

													_								0	outcome	-				_
Dra	g a c	olumn	header	here	to group I	by that column				-			Dra	gao	olumn	header	here	to group	by th	at column		0					
		0	Dist		ID	Incident Date	-	Incident Involved	A	Outcome	-	F cility			0	Dist		ID	Inci	dent Date	Inci	dent Involved	•	Outcome	•	Facility	
					٣		• 🕈											8		•	₹		7		7		
	۲		None		<u>3757</u>	12 Jan 2015		Patient/Client		ISR 4 MINOR		Acacia Private		۲		None		<u>3757</u>	12	Jan 2015	Pati	ent/Client		ISR 4 MINOR		Acacia Private	e
	۲		None		<u>3752</u>	9 Dec 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private		۲		None		<u>3752</u>	9 D	ec 2014	Pati	ent/Client		ISR 3 MEDIUM		Acacia Private	e
<i>K</i>	۲		None		<u>3742</u>	28 Nov 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private		۲		None		<u>3742</u>	28	Nov 2014	Pati	ent/Client		ISR 3 MEDIUM		Acacia Private	e
C	۲		None		<u>3735</u>	28 Nov 2014		1 ent/Client		ISR 4 MINOR		Acacia Private		۲		None		<u>3735</u>	28	Nov 2014	2	ent/Client		ISR 4 MINOR		Acacia Private	e
	۲	Ú	None		<u>3711</u>	22 Sep 2014		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		۲	U	None		<u>3711</u>	22 :	Sep 2014	Stat	f Member		ISR 4 MINOR		Eucalyptus Lo	odge
e	۲		None		<u>3710</u>	19 Sep 2014		Patient/Client		ISR 4 MINOR		Acacia Private		۲		None		<u>3710</u>	19 :	Sep 2014	Pati	ent/Client		ISR 4 MINOR		Acacia Private	e
л					-																						
D	outco	memn	heade	re	to group I	by that column							0	tcor	ne 🔺	Ţ											
ŵ		0	Bist		ID	Incident Date		Incident Involved		Outcome	◄	Facility															
					۲											10 D	ist	IC	)	Incident Date		Incident Involv	ed	Facility		Gr	roup
					0767	10.3-2.0015		Datient/Client		ICD 4 MINOD		Asseis Drivate							٣		- 🕈			8		٣	
	۲		None		3/5/	12 Jan 2015		Patient/Client		15K 4 MINUK		Acacia Private	-	Out	come:	ISR 1 S	EVER	E									
	۲		None		<u>3752</u>	9 Dec 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private			۲	Ű N	one	34	81	23 Jun 2012		Client		Eucalyptus Loo	dge		Mas
C.	۲		None		<u>3742</u>	28 Nov 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private	-	Out	come:	ISR 2 H	IGH				-						
C.	۲		None		<u>3735</u>	28 Nov 2014		3 ent/Client		ISR 4 MINOR		Acacia Private	ſ		۲	N	one	33	89	1 Jun 2012	4	Patient/Client		Eucalyptus Loo	dge		
	۲	Ú	None		<u>3711</u>	22 Sep 2014		Staff Member		ISR 4 MINOR		Eucalyptus Lodge			۲		1	35	72	3 Feb 2011		Client		Acacia Private			
-	a		None		2710	10 Con 2014		Datient/Client		ISR 4 MINOR		Acadia Brivato		00				-		F 4		Client					

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:

Ľ		Select a record to display the available tools.								IN	IBOX - Inc	cio ents	dents for Rev and edits of Incidents	ie	W	🛱 🖬 🖾	
_																	
Di	ag a d	colum	n heade	r here	to group	by that colum	n										
		0	Dist		ID 🔺	Group	Incident Date	T	Incident Involved	Ŧ	Outcome	Ŧ	Facility	Ŧ	Location 🕞	Summary	-
				ľ	Ÿ	Ŷ		- 🕈		Ŷ		٣		٣	5	7	Ŷ
5	</th <th></th> <th>None</th> <th></th> <th><u>3389</u></th> <th></th> <th>1 Jun 2012</th> <th></th> <th>Patient/Client</th> <th>-</th> <th>ISR 2 HIGH</th> <th></th> <th>Eucalyptus Lodge</th> <th></th> <th>Centre Block 7th Floor</th> <th>Fell in shower</th> <th></th>		None		<u>3389</u>		1 Jun 2012		Patient/Client	-	ISR 2 HIGH		Eucalyptus Lodge		Centre Block 7th Floor	Fell in shower	
é	3 @		None		<u>3474</u>	3480	3 Feb 2012		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.	
E	•	Ú	None		<u>3480</u>	Master	13 Jun 2012		Intervention		ISR 4 MINOR		Acacia Private		Dayton	Pt delivered incorrect dosage instructions on medication	
æ		Ú	None		<u>3481</u>	Master	23 Jun 2012		Client		ISR 1 SEVERE		Eucalyptus Lodge		Community Health Ce	Client became aggressive during meal time	
ß			None		<u>3493</u>		29 Jan 2012		Client		ISR 3 MEDIUM		Acacia Private		Centre Block 4th Floor	Pt adminstered extra dose of heparin not happy!	
ß	1 .		None		3497		25 Eeb 2012		Client		ISR 3 MEDIUM		Acacia Private		Dav procedure unit	SPECIMEN LOST AFTER COLLECTION	

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

Incident Involved	•	Outcome 💌	Fac
	?	Ŷ	
Patient/Client		Begins with	Euc
Staff Member		Contains	Euc
Intervention		Doesn't contain	Aca
Client		Ends with	Euc
Client		Equals	Aca
Client		Doesn't equal	Aca
Volunteer	L.,		Aca
Client			0

Incident Date	<b>-</b> I	ncident Involved 🔄	Out	come
•	• 💎	Ŷ		_
1 Jun 2012		Equals		HIG
3 Feb 2012		Doesn't equal		MIN
13 Jun 2012		Is less than		MIN
23 Jun 2012		Is less than or equal to		SEV
29 Jan 2012		Is greater than		MED
25 Feb 2012		Is greater than or equa	l to	MED
or a Looko		/=	TOD	4 8.ATS

**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:

		Ø	Dist		ID 🔺	Group	Incident Date	-	Incident Involved	Outcome	-	Facility	-	Location 💌	Summary
				[	٣	8		8	staff 🛛 🕈		٣	٢	9	8	\$
	۲		None		<u>3474</u>	3480	3 Feb 2012	I	Staff Member	ISR 4 MINOR		Eucalyptus Lodge		Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	۲		None		<u>3574</u>		3 Feb 2012	1	Staff Member	ISR 4 MINOR		Acacia Private		Cardiac Rehab	Staff member hurt back lifting patient from bed to chair
	۲		None		<u>3590</u>		18 Aug 2011	I	Staff Member	ISR 3 MEDIUM		Acacia Private		Main Entrance	I was assaulted by a patient outside main entrance when I was coming $t_{\cdots}$
	۲		None		<u>3591</u>		19 Aug 2011	1	Staff Member	ISR 3 MEDIUM		Acacia Private		Centre Block 2nd Floor	Assault by client in reception
	۲		1		3631	Master	3 Feb 2012	I	Staff Member	ISR 3 MEDIUM		Acacia Private		Centre Block 3rd Floor	Became aggressive towards a staff member
	۲		1		<u>3697</u>	3696	7 Jan 2013	1	Staff Member	ISR 4 MINOR		Acacia Private		Ward 1F	Fell over
	۲	Ú	None		<u>3711</u>		22 Sep 2014	I	Staff Member	ISR 4 MINOR		Eucalyptus Lodge		Applicances	stuff stuff stuff
								1							
7 Re	cords Found (Page 1 of 1) Items per page: 15 🔹 « « 🕻 1 • > >>														

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  $\cancel{X}$  in the toolbar:

>	(	Select a record to display the available tools. INBOX - Incidents for Review New Incidents and edits of Incidents														
	Drag a column hander here to group by that column															
	Drag	acc	R	neader	nere	to group	by that column					<u>.</u>		- 10		
			ιÜ	Dist			Group	Incident Date		Incident Involved		Outcome		Facility		Locati
						9	٣		- 7	staff	Ŷ		Ŷ		Ŷ	
		۲		None		<u>3474</u>	3480	3 Feb 2012		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		Cafete
		۲		None		<u>3574</u>		3 Feb 2012		Staff Member		ISR 4 MINOR		Acacia Private		Cardia
		۲		None		<u>3590</u>		18 Aug 2011		Staff Member		ISR 3 MEDIUM		Acacia Private		Main E

### 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 <b>View</b>	
icon 🛅 in the toolbar.	

tro	ident	t Inv	olved	• •											
			9	Dist		10	Group	Incident Date	• •	Outcome		Facility		Location 💌	Summary
						4	7		• 7		7		4	\$	
	Incid	lent I	Irwoh	ed: Vol	untee										
	M	۰		None		3536	3531	25 Jul 2012		15R 4 MINOR		Acacia Private		Centre Block 1st Fleor	Pt administered extra dose of panadol
	Incid	lent I	Irwoh	ed: Sta	ll Mer	nber									
	8	æ		None		3590		18 Aug 2011		ISR 3 MEDOUM		Acada Private		Main Entrance	I was assaulted by a patient outside main entrance wh
	2	۰		None		3591		19 Aug 2011		ISR 3 MEDOUM		Acacia Private		Centre Block 2nd Floor	Assault by client in reception
	2	٠		None		3574		3 Feb 2012		ISR 4 MENOR		Acada Private		Cardiac Rehab	Staff member burt back lifting patient from bed to chair
Г	2	۰		None		3474	3460	3 Feb 2012		ISR 4 MINOR		Eucalyptus Lodge		Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd deg
	83	۰		1		2621	Master	3 Feb 2012		ISR 3 MEDDUM		Acada Private		Centre Block 3rd Floor	Became appressive towards a staff member
Г	¢3	۰		1		3697	3695	7 Jan 2013		15R 4 MINOR		Acacla Private		Ward IF	Fell over
	8	۰	£	None		3711		22 Sep 2014		ISR 4 MINOR		Eucalyptus Lodge		Applicances	stuff stuff stuff
	Incid	lent l	Irwoh	ed: Rel	atare)*	Vestor									
r	M	æ		None		3573		1 Feb 2011		ISR 5 NEAR MISS		Acacia Private		Emergency Department	Visitor entered ED in an intoxicated state and abused s
	Incid	lent 1	Irwoh	ed: Pro	perty										
	×	٠		Note		3703		5 Mar 2013		ISR 4 MINOR		Acacia Private		Cafetoria	Walls appear to be water damaged
	Incid	lent I	Involt	ed: Pat	ient/C	lient									
Г		٠		None		3665		31 Jul 2011		ISR 4 MINOR		Eucalyptus Lodge		Consulting suites	Patient fell resulting in a skin tear
	M	۰		None		3620		17 Aug 2011		ISR 4 MINOR		Acacia Private		Centre Block 1st Floor	Patient fell in shower
Г		٠		None		3630	3631	3 Feb 2012		ISR 4 MINOR		Acacia Private		Centre Block 3rd Floor	Became appressive towards a staff member
	M	۰	٤	None		3635		6 Feb 2012		ISR 4 MINOR		Acacia Private		Centre Block 6th Floor	Incorrect dose of medication given to patient
r	85		6	1		3663		21 Fab 2012		ISR 5 NEAR MISS		Acacia Private		Centre Block 7th Flaor	Client appressive towards the staff member



• Type a name for your View.

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

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

	Views						
/iews allo You	ews allow you to save the current configuration of your list of records (columns displayed, sorting, grouping and even any filtering applied either from the grid or the Selection Settings popup) for future use. You can then Apply any View you have previously saved and instantly change the setup of your list.						
	Save the current list configu	uration as a View					
	by incluent involved						
	Saved Views for the (Inc	cident Inbox).					
Apply	Saved Views for the (Inc	cident Inbox).	Delete				
Apply	Saved Views for the (Int View Name By Location and II	cident Inbox).	Delete 1111				

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

o • Log	Out		USER: System	Manager (Manager)
- Inci	idents for Revie	w	۵ 🖿	XI 🛄
lew inciden		View Name		Арріу
	By Incident Involved			4
	By Location and II			4
	By Outcome			4
		Carlon Caninary		
Ŷ	♥	Υ		♥

### 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.

None 🗌	] <u>3723</u> 7	Blah blah blah ISR 4 MINOR
177 Records Found (Page 1 of 18)		Items per page: 10 • 《 < 1 • > 》
e ® None □	] <u>2</u> e Ir	nform Injury to low Returned to f
177 Records Founc <mark></mark> (Page 1 of 1)		Items per page: 200 • 《 < 1 • > 》

#### (i) 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:

- Switch between the various record lists that you have permission to view
- Restrict the records being shown on your page by record type; in this example by Incident Involved
- Restrict the records being shown on your page using date filters (the date fields available will vary by register)

Selection Settings		×
	Selection Settings	
Display:	1 Inbox (Incidents)	
Incidents Involving:	All Incidents •	
Date Entered:	From To	-
Incident Date:	From To	
Notification Date:	From To	•
Incident IDs:	0	
Allow rows to expand ver Apply Settings	ically: 🧕 🗆	
		Clear Layout

• 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

• 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.

Summary 💌	Summary 💌
2	?
Visitor entered ED in an intoxicated state an	. Visitor entered ED in an intoxicated state and abused staff
ABO Blood Incompatibly during transfusion	
noo blood incompany, damig dansiasion	ABO Blood Incompatibly during transfusion
Patient has incurred complication with stag	, bo brood incomposibly daming damadasi
Patient has incurred complication with stag	Patient has incurred complication with stage
Client became aggressive in reception - assa	3 pressure ulcer
	Client became addressive in recention -
person became aggressive	assaulted staff member

Left: Setting turned off Right: Setting turned on

• 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.

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.

1	0	My Wor	•	М	anager	nent	+	
	. 1	1 1	o	G	Ъ	¥⊟	-	

#### **Review My > Incidents**



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



#### Inbox > Incidents

Man	agement 🔻	Administrat	ion 🔻	Analysis
2	Inbox	•		Incidents
	Enquiry	۲ ا		Feedback
3	Corporate O	bjectives		
$\Delta$	Risk Registe	er		

#### Enquiry > Posted Incidents

Mana	agement 🔻	Administ	rat	ion 🔻	Analysis 🔻 🛛		
<b>N</b>	Inbox		۲		Ento		
	Enquiry			Posted Incidents			
3	Co Jorate Objectives				Posted Feedback		
$\Delta$	Risk Registe	er					

### 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 with a red x** A deleted item.

An item that you have never viewed.



#### 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.

1		~	
0	ĽS.	_	1
	٩Z		а.

#### 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.



۲

#### Red eye

Green eye

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

۲	Gı
	Ar

#### Grey eye

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

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#### **Distribution List**

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

P

#### 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:

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 A in the Selection State Menu

°O.		1	7	ø	ć	21	Shows In	Entered acidents entered by you or	Incidents anyone reporting to you,			
Drag	Drag a column header here to group by that column											
		Archived	Q	Dist		ID	Notification Date 💡	Reporters Name 💡	Surname <del>ç</del>			
						Ŷ	Ψ	Ŷ	Ŷ			
	۲			1		3697	7 Jan 2013	Default User	Hayden			
	۲			None		3695	14 Nov 2012	System Manager	Smyth			
	۲		U	None		3674	1 Aug 2012	Faulkner, Laura	Faulkner			
	۲	Yes		1 (		3672	1 Aug 2012	Hayden, Anne	Hayden			
	۲			1		3671	1 Aug 2012	Nicolaidis, Christine	Mctest			
	۲		U	None		3667	1 Aug 2012	Nicolaidis, Christine	McTest			

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

stribution Lis	t							
Incident Distribution List								
			I	ncident ID: 3674				
Aug 2012 00:00	Faulkner, Laura	Acacia Private	Location Centre Block 3rd	Floor Patient agores	sive towards staff member	_		
,,						_		
	Unassign	ed			Assigned			
			Ψ.			*		
			Double-Click a	name to assign o	r unassign.			
	Filter List	- 5						
ase enter any add	ditional information	to accompany th	e distribution					
: email:								
					2			
					Ŭ			

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

Distribution List		3
Distribution List Incident Dis Incident Di	stribution List t ID: 3674  Select Users User Name Filter: User Name Filter: User Position Filter: User Facility Show My Staff:  Clicking the 'Filter List' buttom without entering any criteria will return all users. The username filter can be any part of the name.	•
Please enter any addition thinformation to accompany the distribution list email:		
		+

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.

Distribution List	t							×	
	Incident Distribution List Incident ID: 3674								
Notification Date	Reporters Name	Facility	Location	Description					
1 Aug 2012 00:00	Faulkner, Laura	Acacia Private	Centre Block 3	rd Floor Patient aggressiv	ve towards staff memb	ber			
4	Unassigne	d				Assigned		l	
Marky Mark (Marky	Mark)		▲	5 Assign >			*		
			Double-Click	a name to assign or u	nassign.				
	Filter List	8							
Please enter any add list email:	litional information t	o accompany th	e distribution					+	
				-					

The users name will move to the Assigned window

Unassigned	^	Assigned Marky Mark (Marky Mark) (on 11 Nov 2019 12:12)
	Ţ	·
Doub	le-Click	k a name to assign or unassign.

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.

Unassigned		Assigned	
A		Marky Mark (Marky Mark) (on 13 Jan 2020 12:11)	-
	< Remove		
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
· · · · · · · · · · · · · · · · · · ·			•
Double-Click	a name to assign o	r unassign.	

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.

#### 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. **Show All... button** 

Expands the Review History window to show all entries

Distribution List		×
	Incident Distribution List	<b>^</b>
•	Incident ID: 3674	
1		
Notification Date Reporters Name Facility	Location Description Centre Block 2rd Floor Datient appreciate towards staff member	
T Aug 2012 00:00 Taukilei, Laura - Acacia Privace	Centre Diock of a hoor Patient aggressive towards stan member	
Unassigned	Assigned	
Fernandez, Brett (Brett)	Marky Mark (Marky Mark) (on 5 Nov 2019 20:15)	
Hayden, Anne (anneh) Hensley, Jonathan (Jonathan E Hensley)	Lauren Haupt (lhaupt) (on 5 Nov 2019 20:28)	
Lauren Manager (Lauren Manager)	Assign >	
Risk Manager (Risk Manager)	6	
•	< Remove	
	• <del>•</del>	
	Double-Click a name to assign or unassign.	
6 Filter List 🕹		
Please enter any additional information to accompany th	e distribution list email:	
7		
-		
	8 Send Email & Close	
Deview History		
Review mistory		
Date 🔺 User 🔶 🔶	Notes	
1 Aug 2012 12:17 Faulkner, Laura (lauraf)	Created the incident item.	
1 Aug 2012 12:17	Risk Manager Email SENT.	
1 Aug 2012 12:18 Esler, Scott D. (Scott Esler)	User Alerted and Email NOT SENT. Alert ID: 19	
15 Aug 2012 11:17 Welsh, Simon (Simon)	Email SENT: Distribution List <u>&lt; <sup>(1)</sup> Email &gt;</u>	
15 Aug 2012 11:23 Welsh, Simon (Simon)	Incident first viewed after being assigned on Faulkner, Laura (lauraf)'s distribution list.	
Show More Show All		
10 11		-

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#### 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 I in the Selection State Menu

Ø	2	<b>1</b>	2	P	Ć	2		Shows I	Entered ncidents entered by you o	Incidents or anyone reporting to you,			
Drag	Drag a column header here to group by that column												
		Archived	Q	Dist		ID		Notification Date 💡	Reporters Name 💡	Surname 💡			
							Ŷ		9	Ŷ			
	۲			1		3697		7 Jan 2013	Default User	Hayden			
	۲			None		3695		14 Nov 2012	System Manager	Smyth			
	۲		U	None		3674		1 Aug 2012	Faulkner, Laura	Faulkner			
	۲	Yes		1 (	V	3672		1 Aug 2012	Hayden, Anne	Hayden			
	۲			1		जे <sub>3671</sub>		1 Aug 2012	Nicolaidis, Christine	Mctest			
	۲		U	None		3667		1 Aug 2012	Nicolaidis, Christine	McTest			

The Bookmark Items confirmation dialogue will be displayed.

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

Hayden, Anne	Bookmark items		East
Nicolaidis, Christine	Bookillark itellis	~	AC3
Nicolaidis, Christine			Centr
Nurse, Mary	Bookmark for item 36/4 has been adde	:d.	Ward
Nurse, Mary	ОК		Day p
Nurse, Mary			Day p
Nurse, Mary			Ward
Brooks, Jason			Centr
Lisa Storck			GICU

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

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

**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.

Bookmark	×
Bookmark for item 3910 has been removed. OK	
	^



#### Method 2

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

Control Panel									
Version Control									
I<< <		Part 6 of 6 of a mul							
Last edited by:Faulkner, Laura (lauraf) on 20 Aug 2012 10:51:56									
Related Incident	IDs								
3670 Master	3674								
Actions									
🖌 Bookmark	Archive	Alert Me! Ch							

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

Bookmark	x
Bookmark for item 3674 has been removed.	
ОК	
	1.

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#### **Link Records**

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

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

Open the Link Records dialogue – Click on the Link Records icon P in the Selection State Menu

°0	9	1	4 2	P	ť	2 1	Shows I	Entered ncidents entered by you or	Incidents anyone reporting to you, o					
Dra	Drag a column header here to group by that column													
		Archived	Q	Dist		ID	Notification Date 👻	Reporters Name 👻	Surname 👻					
						Ŷ	۲ ۲	Ŷ	Ŷ					
	•			1		3697	7 Jan 2013	Default User	Hayden					
	۲			None		3695	14 Nov 2012	System Manager	Smyth					
	۲		Ú	None		3674	1 Aug 2012	Faulkner, Laura	Faulkner					
	۲	Yes		1 (	V	3672	1 Aug 2012	Hayden, Anne	Hayden					
	۲			1		र्जे 3671	1 Aug 2012	Nicolaidis, Christine	Mctest					
	۲		Ú	None		3667	1 Aug 2012	Nicolaidis, Christine	McTest					

B 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 Q

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.* 

				Link Rec	ords	
Incident IE	):	3	3697	<b>4</b> ⊘Q	0	
Linking/De	e-linking Rea	ason:	These inciden	is are related to an ongoing investiga	tion.	
Status	Exclude	ID		Surname	First Name	
Master			3674	Faulkner	Laura	
۲	2		3697	Hayden	Anne	
						,

Other functions available in the Link Records window.

	Link Records													
Incident IE	cident ID: 3697 🔗 🔍 🕕													
Linking/De	nking/De-linking Reason:													
Status	Exclude	ID		Surname	First Name									
Master			3674	Faulkner	Laura									
۲	🕞 👸 3697 Hayden Anne													
1	2													

0	€	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	3	Exclude	This will remove the record from the group
₿		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 街 in the Selection State Menu

Ľ			1	2	co 2	ť	2		Shows In	Entered ncidents entered by you o	Incidents r anyone reporting to you,		
Di	Drag a column header here to group by that column												
			Archived	Q	Dist		ID		Notification Date 👻	Reporters Name 👻	Surname <del>y</del>		
								Ŷ	<b>▼</b> Ŷ	Ŷ	Ŷ		
G.		۲			1		3697		7 Jan 2013	Default User	Hayden		
Ø		۲			None		3695		14 Nov 2012	System Manager	Smyth		
	/	۲		Ú	None		3674		1 Aug 2012	Faulkner, Laura	Faulkner		
	~	۲	Yes		1 (	V	3672		1 Aug 2012	Hayden, Anne	Hayden		
	/	۲			1		र <sup>े</sup> 3671		1 Aug 2012	Nicolaidis, Christine	Mctest		
		۲		U	None		3667		1 Aug 2012	Nicolaidis, Christine	McTest		

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

6	3	1	7	o	Ć	2	Shows I	Entered ncidents entered by you or	Incidents anyone reporting to you,					
Drag	Drag a column header here to group by that column													
		Archived	Q	Dist		ID	Notification Date 👻	Reporters Name 💡	Surname <del>y</del>					
						Ŷ	· · · ·	Ŷ	Ŷ					
	۲			1		3697	7 Jan 2013	Default User	Hayden					
	۲			None		3695	14 Nov 2012	System Manager	Smyth					
	۲		Ú	None		3674	1 Aug 2012	Faulkner, Laura	Faulkner					
	۲	Yes		1 (		3672	1 Aug 2012	Hayden, Anne	Hayden					
	۲			1		र्जे 3671	1 Aug 2012	Nicolaidis, Christine	Mctest					
	۲		U	None		3667	1 Aug 2012	Nicolaidis, Christine	McTest					

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

۰.	1	Ы	o	ඵ	Ĩ	<u>ش</u>
				2		Complaint Response Letter
				- <b>U</b>	4	Compliment Thank you
Drag a	column h	neader h	ere to gro	oup by th	at	Suggestion Reply
		_	_	_		

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:

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

°.		1	A	[	o <sup>o</sup>		Posted Incidents Incidents accepted and reviewed, ready for reports.								
	2														
Dra	Drag a column header here to group by that column														
		Q	Dist		ID	Incident Date 🤊	Reporters Name	Incident Involve	Facility 💡	Location 📍	Date Entered 👻	Review Status 🤋			
					Ŷ		Ŷ	Ŷ	Ŷ	Ŷ	▼ Ŷ	Ŷ			
	۲		None		3848	25 Apr 2019	Default User	Patient/Client	Acacia Private	Adminstration	30 Apr 2019	Pending			
	۲		1		3824	11 Jan 2019	System Mana	Patient/Client	Eucalyptus L	Adminstration	24 Apr 2019	Pending			
			1 (	V	3845	23 Apr 2019	Trainee 1	Patient/Client	Cabell Huntin	Carpark (visit	23 Apr 2019	Pending			
	۲	U	1		3811	7 Jan 2019	System Mana	Patient/Client	Wattle Private	Adminstration	22 Feb 2019	Pending			

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

	Posted Incidents Incidents accepted and reviewed, ready for reports.										
2	Incident Involve	Facility ?	Location 🕈	Date Entered 👻	Review Status 🖣	Severity <del>?</del>	Surname 💡				
	Patient/Client	Acacia Private	Adminstration	30 Apr 2019	Pending	ISR 3 MEDIUM	Ragnarok				
	Patient/Client	Eucalyptus L	Adminstration	24 Apr 2019	Pending	ISR 4 MINOR	Spatt				
	Patient/Client	Cabell Huntin	Carpark (visit	23 Apr 2019	Pending	ISR 4 MINOR	boo				
	Patient/Client	Wattle Private	Adminstration	22 Feb 2019	Pending	ISR 4 MINOR	Johnson				

**B** Display Deleted Incidents – Click the Display dropdown list and select Deleted Incidents

Then click on the Apply Settings button. All deleted records will be displayed in the Deleted Incidents list

Selection Settings			×
Display: Incidents Involving:	3	Selection Settin	gs
Date Entered: Incident Date: Notification Date:	From From From	Accepted Incidents To All Incidents To Posted Incidents To	
Incident IDs:		Entered Incidents Newly Assigned Incidents	
Allow rows to expand vertica	lly:		
			Clear Layout

- 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
- **S** 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

0	Celeted incidents											
(	Drag a column header here to group by that column											
			Q	Dist		ID	Notification Date 💡	Reporters Name 💡	Surname 💡	Facility 🕈		
						Ŷ	<b>▼</b> 9	Ŷ	Ŷ	Ŷ		
	×	۲		None		3850	30 Apr 2019	Default User	www	Acacia Private		
	×	۲		None		3616	3 May 2011	Nurse, Mary	Smith	Acacia Private		
	×	۲		None		3603	18 Feb 2011	Nurse, Mary	Smith	Acacia Private		
	×	۲	4	None	V	3845	15 Oct 2011	Nurse, Mary	Smith	Acacia Private		
	×	۲		None		3581	31 Mar 2011	Nurse, Mary	Smith	Acacia Private		

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.

<b>`</b> ?	3	Select a r	ecord	to disp	olay t	he availab:	le tools. Shows	Entered Incidents entered by you or
Drag	ас	olumn head	der he	ere to g	roup	by that co	lumn	
		Archived	Q	Dist		ID	Notification Date	Reporters Name 👻
						Ŷ	-	Ŷ
	۲			1		3697	7 Jan 2013	Default User
	۲			None		3695	14 Nov 2012	System Manager
	۲		U	None		3674	1 Aug 2012	Faulkner, Laura
	۲	Yes		1		3672	1 Aug 2012	Hayden, Anne
	۲			None		3671	1 Aug 2012	Nicolaidis, Christine
	۲		U	None		3667	1 Aug 2012	Nicolaidis, Christine
	۲	Yes	Ú	None		3635	6 Feb 2012	Default User
	۲		U	None		3617	21 May 2011	Nurse, Mary
×	۲			None		3845	3 May 2011	Nurse, Mary
	۲			None		3615	30 Apr 2011	Nurse, Mary
	۲			None		3584	21 Apr 2011	Nurse, Mary

#### 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

Drag a column h	Drag a column header here to group by that column										
0 0	ist 🔲	ID 🔺	Incident Date	Ŷ	Date Entered	Ŷ	Reporters Name	Ŷ			
		3823 🕈		- Ÿ		- Ϋ		Ŷ			
🐼 🗶 N	lone 🔲	3823	9 Jan 2019	(	15 Mar 2021		System Manager				
Records Found (Page 1 of 1)											
Control P	anel										
Version C	ontrol										
Part 2 of 2 of a multi-edit report, the current version.											
Last edited by:System Manager (Manager) on 15 Mar 2021 12:00:01											
Unposted edit by:System Manager (Manager) on 15 Mar 2021 12:00:01											
Actions											
Bookm	ark	A	rchive	Alert	Me! C	hange Histo	ory Dis	t. List			

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:

- 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.

°?	2	1	М	o	ć	21	🖹 📲 5 Shows I	Entered ncidents entered by you o	Incidents r anyone reporting to you,
	۲		Ú	None		3667	1 Aug 2012	Nicolaidis, Christine	McTest
	۲	Yes	Ú	None		3635	6 Feb 2012	Default User	Smith
	۲		Ú	None		3617	21 May 2011	Nurse, Mary	Smith
×	۲			4	<b>V</b>	3845	3 May 2011	Nurse, Mary	Smith
	۲			None		3615	30 Apr 2011	Nurse, Mary	Smith
	۲			None		3584	21 Apr 2011	Nurse, Mary	Smith
	۲			None		3533	28 Jul 2012	Brooks, Jason	Esler
	۲	Yes		None		3516	14 May 2012	Nurse, Mary	Smith
	۲	Yes		None		3510	15 Apr 2012	Nurse, Mary	Smith

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

title.

Entered Incidents						
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.						
Archived status for item(s) 3845 has been set.						

#### **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.	ao to	the	Entered	Incidents	list.
			,	3				

Show	Entered Incidents Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.									
te 🕈	Reporters Name 💡	Surname 💡	Facility <del>9</del>	Location 📍	Summary <del>y</del>	Outcome 💡				
<b>▼</b> Ŷ	Ŷ	Ŷ	9	Ŷ	Ŷ	Ŷ				
	G Lammens	Piper	Acacia Private	Ward G2 SDMH	Pt fell from chair	ISR 4 MINOR				

2 Open Selection Settings – Click on the cog
icon to open the Selection Settings window

Selection Settings	د	ĸ
	Selection Settings	
Display:	Entered Incidents	
Incidents Involving:	All Incidents 🔻	
Date Entered: From	- To -	
Incident Date: From	• To •	
Notification Date: From	• To •	
Incident IDs:		
Show Archived: 2		
Allow rows to expand vertically:		
Apply Settings		
	Clear Layout	

**3** Showed Archived – Tick the checkbox next to Show Archived

4 Then click on the Apply Settings button

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

	°0.	3	1	Ы	P	Ĺ	2	Ĩ	) L <sup>III</sup> Show	Ente ws Incidents entered by	red Incid	er	<b>1ts</b> ng to you, or that hav	/e
	Drag	ас	olumn hea	der he	ere to g	roup	by that	col	umn					
			Archived	Q	Dist		ID		Notification Date 👻	Reporters Name 💡	Surname	Ŷ	Facility 💡	
						[		9	▼ 9	Ŷ		Ŷ		Ŷ
		۲	Yes	6	1	<b>V</b>	3845		23 Apr 2019	Trainee 1	boo		Cabell Huntington	
		۲			None		89		31 Jan 2012	G Lammens	Piper		Acacia Private	
	2 Rec	ords	Found (Pa	ge 1	of 1)									
6	Select the record – Put a tick in the checkbox to select the record that you want to recover													
7	<b>Remove from Archive</b> – Click on the Archive icon in the selection state menu													

0	3	1	7	o	Ć	21	L L		Ente ws Incidents entered by	red Incide	nts ting to you, or that hav
Drag a column header here to group by that column											
		Archived	Q	Dist		ID	N	otification Date 💡	Reporters Name 👻	Surname 💡	Facility 9
				(	6	Ŷ		<b>▼</b> 9	Ŷ	9	
	۲	Yes		1	<b>V</b>	3845	23	3 Apr 2019	Trainee 1	boo	Cabell Huntington
	۲			None		89	31	1 Jan 2012	G Lammens	Piper	Acacia Private
2 Records Found (Page 1 of 1)											

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

Entered Incidents								
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.								
Archived status for item(s) 384	5 has been removed.							