RLDatix™

- Homepage Administration -

FOR RISKMAN VERSION 2209

Last reviewed September 2022

CONTENTS

WHAT IS THE HOMEPAGE?

The Homepage contains links to all of the functions you have permission to access, arranged into panels, which we call Widgets. It also contains Shortcuts and Drafts, which we'll explain in more detail in this guide.

Though the homepage has a "default" setup, every user is able to configure it in a way that's meaningful for them.

➔ How to access the homepage

After logging into RiskMan, many users may automatically be directed to the homepage. Also, at any point, users can return to their homepage by clicking the **homepage** icon in the RiskMan menu bar.

ⓘ Note

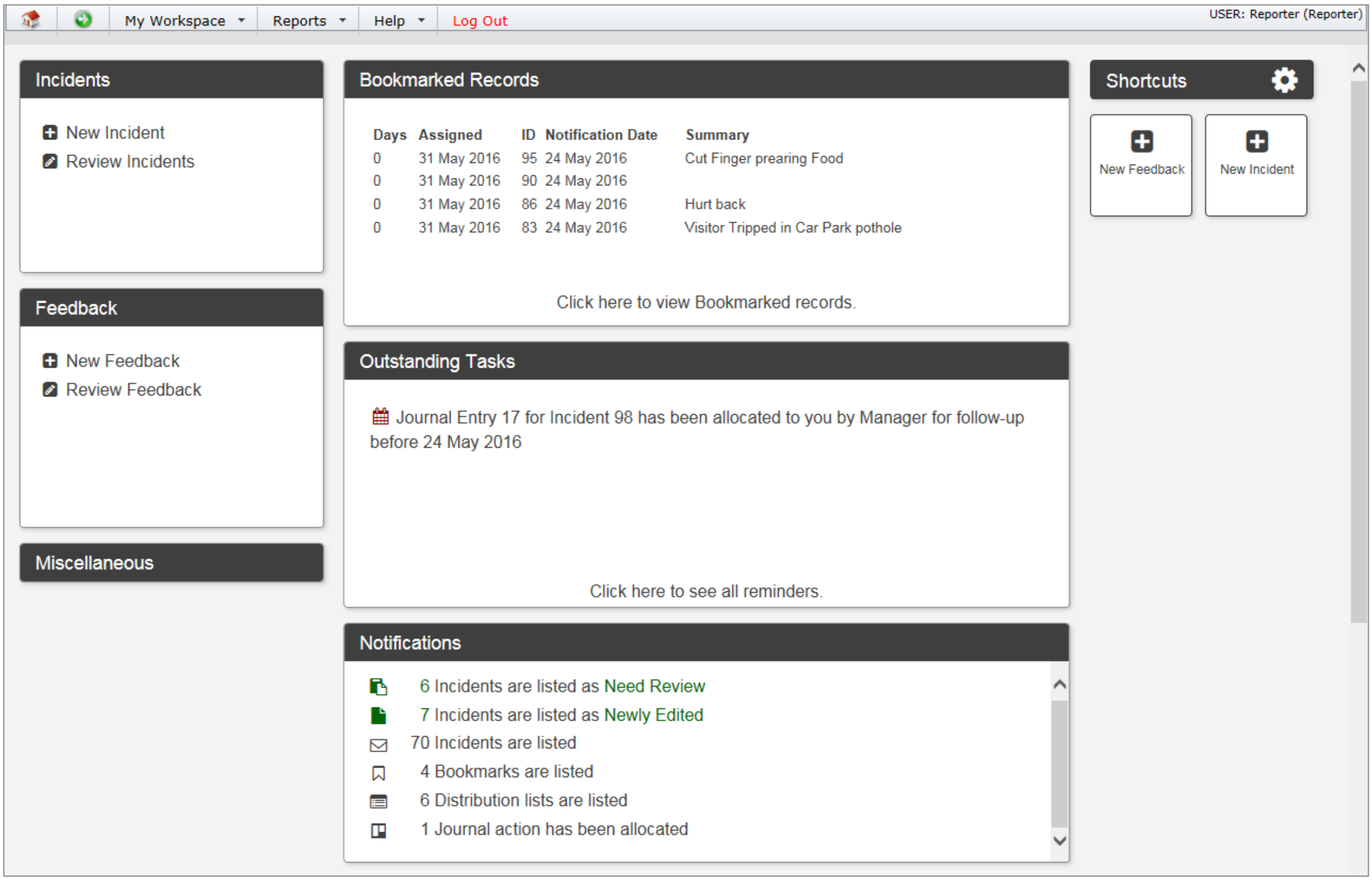
The homepage is supported by versions of Internet Explorer 8 and above. Any users who have an earlier version will automatically see the old homepage.

EXAMPLES

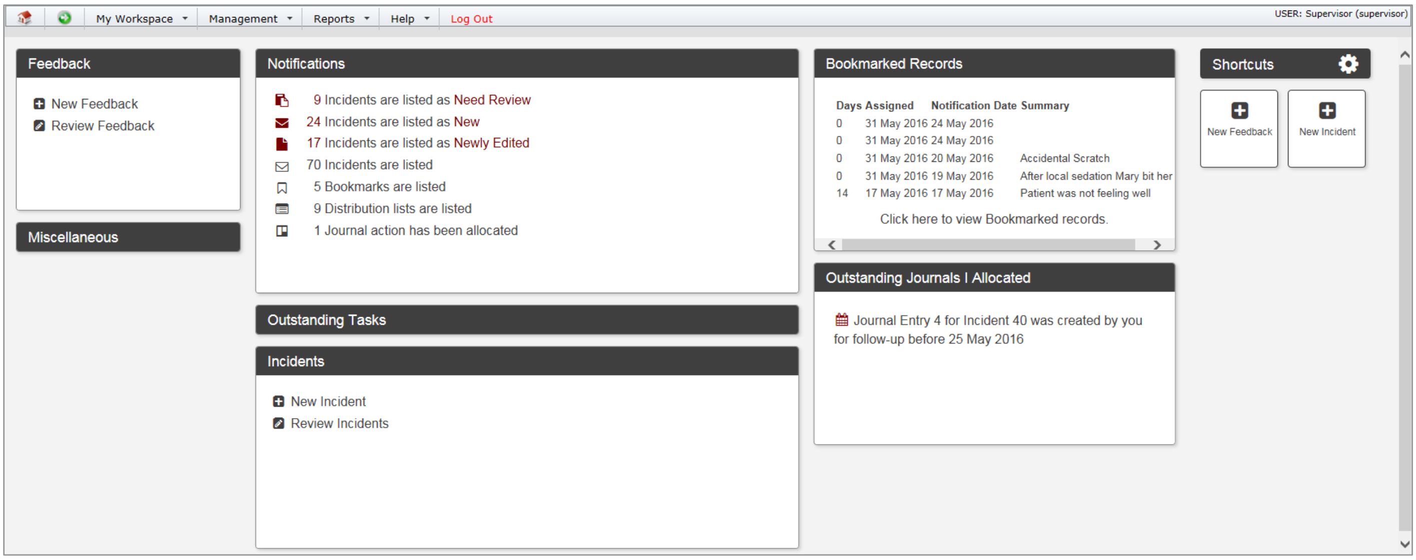
How the homepage will look depends on your RiskMan user permission level.

Homepage Administration

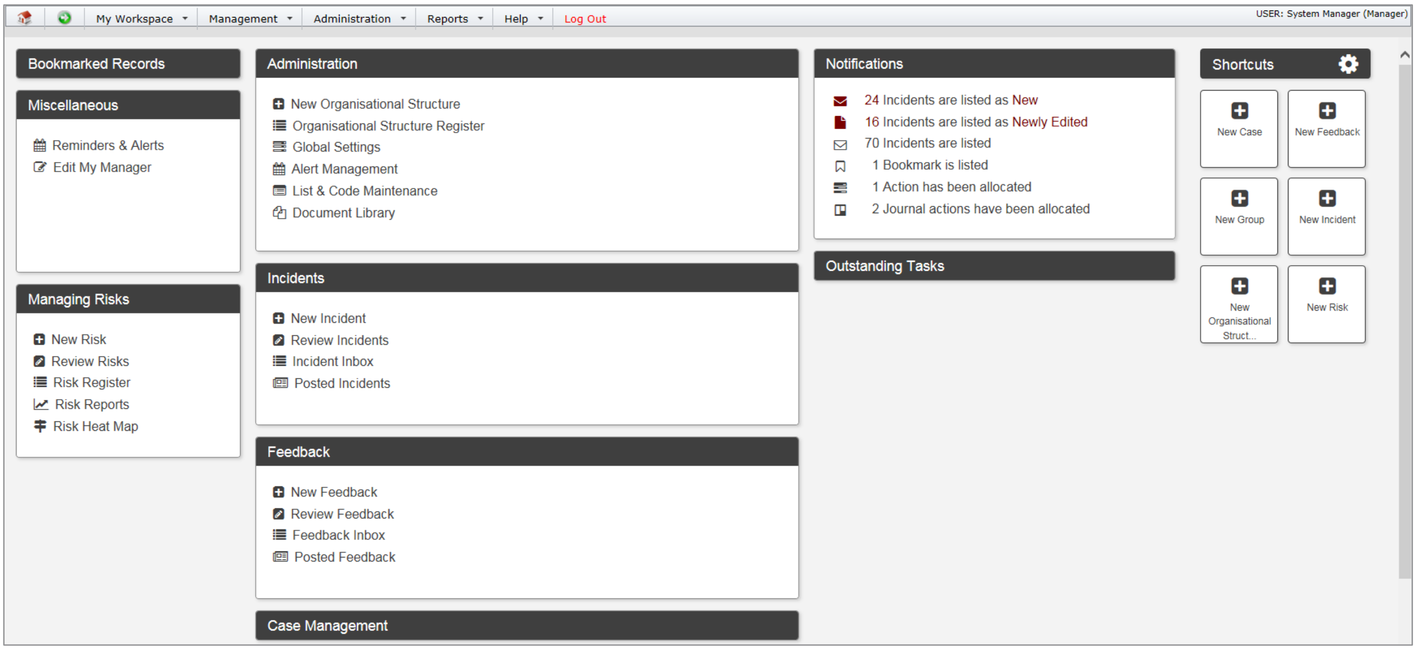
Default users might see something like this:



Line Managers/Supervisors will see an extended version of the homepage:



Higher level users & administrators may see something more like this:



DETAILED OVERVIEW

Homepage Layout

The Homepage is divided into two sections: Shortcuts and Widgets. The width and number of columns (including the shortcuts) varies automatically depending on the width of your browser window.

The Homepage supports customisation by the user, such as positioning, height, or visibility. The shortcuts can also be repositioned. All customisation is retained between user's sessions.

Widgets

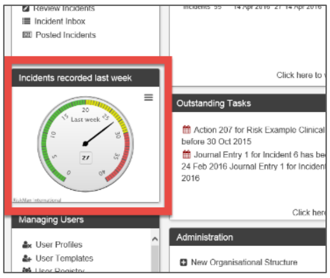
Widgets are independent areas of the homepage that can be customised by expanding, collapsing, resizing, or moving around the screen. There are several types of Widgets. A user's assigned Template(s) will determine which Widgets are available to that user.

Broadly speaking, there are two types of widgets:

- Widgets that represent the functionality a user can access via the RiskMan menu
- Widgets that contain useful information specifically for the user

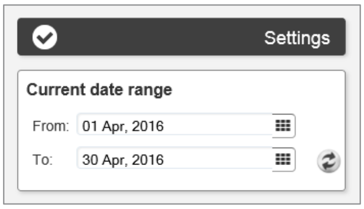
InfoCentre Widgets

Widget created using InfoCentre technology can be displayed on the homepage (charts for example). Only users with permission to manage the homepage can add or remove these widgets.



The example to the right shows a chart, in this case a gauge, being shown on the homepage.

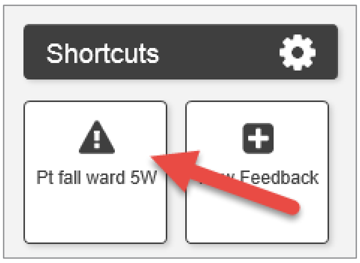
If you display any InfoCentre charts on your homepage, some might be configured to look at a particular date range. You can change the date range those widgets are reporting on by clicking the **Settings Cog** , and adjusting the date range as required.



Shortcuts

A Shortcut allows you to create new record with some information already entered. They are designed to save time by eliminating the need to enter data which frequently needs to be recorded by a user.

For example, in a clinical setting, a nurse might frequently need to record falls which occur on a ward they work in. The nurse could create a Shortcut which starts a new incident, and pre-fills that the incident involved a patient, occurred in the relevant ward, was a fall, and so on. The nurse could then complete the rest of the details on the form and submit the incident.



ⓘ Note

Shortcuts are a user permission and might not be in use in your system.

Drafts

A draft is a partially completed form that a user intends to submit at a later stage. Drafts might also expire after a certain period of time has elapsed (depending on your system configuration).

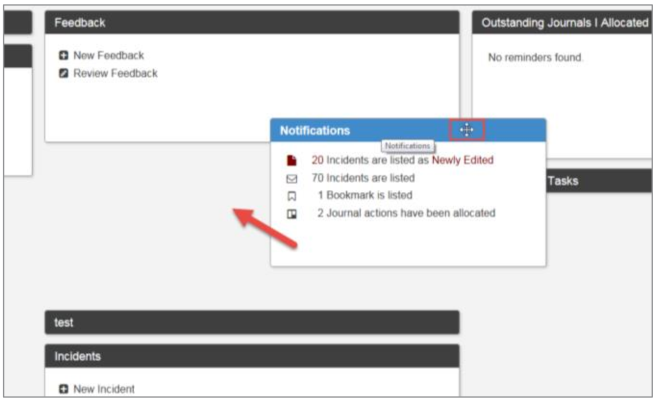
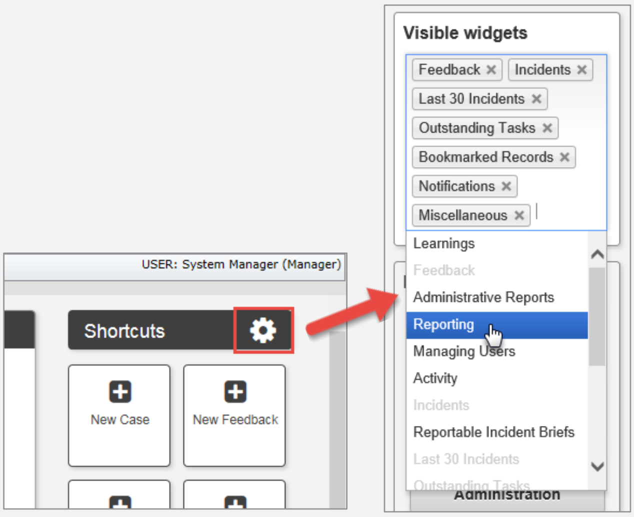
ⓘ Note

Drafts are a user permission and might not be in use in your system.

USING THE HOMEPAGE

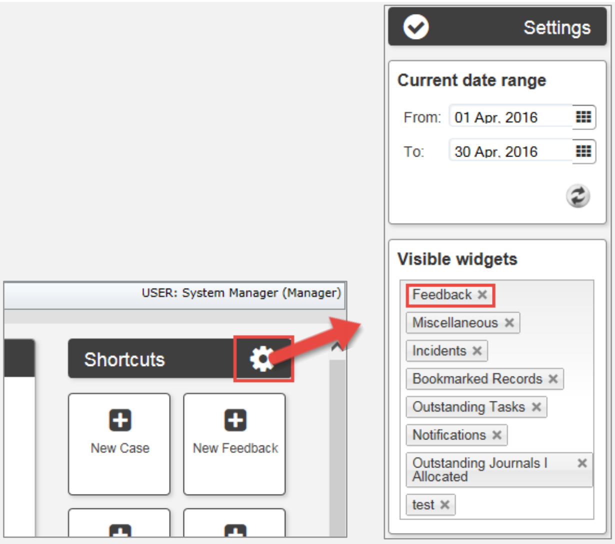
Interacting with the things on your homepage

Ways that users can interact with Widgets:

Action	Description	Screenshot
MOVE WIDGETS	Move a widget to another place within the Homepage. Click and drag the **black bar** of a Widget to move it to a new position. Any changes made will be retained for each individual user.	
ADD WIDGETS	1. Click the Cog icon  to reveal the settings 2. In the **Visible Widgets** panel, click your mouse in the empty space to reveal the list of available widgets 3. Click on a widget name to display it on your homepage	

REMOVE WIDGETS

1. Click the Cog icon to reveal the settings
2. In the **Visible Widgets** panel, find the Widget tag that is to be removed
3. Click the icon



RESIZE A WIDGET

To resize a widget, move your mouse cursor to the bottom of the widget until the cursor changes to the double arrows (shown here). Click and drag to set the widget to the desired size.

EXPAND AND COLLAPSE

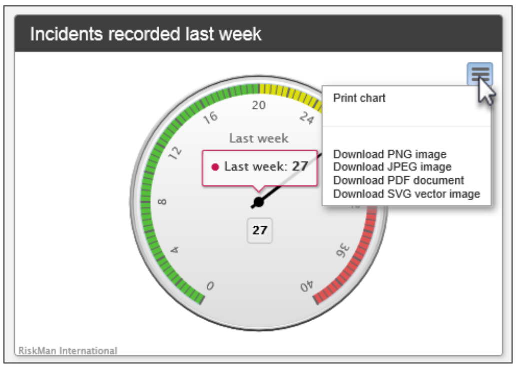
Double click the black heading bar of a widget to collapse and expand it.

The state of each widget is remembered.

PRINT OR DOWNLOAD

Widgets from the InfoCentre can be printed or saved as a file.

Click on the icon and you will see the available file formats, and the option to print the widget as it is.



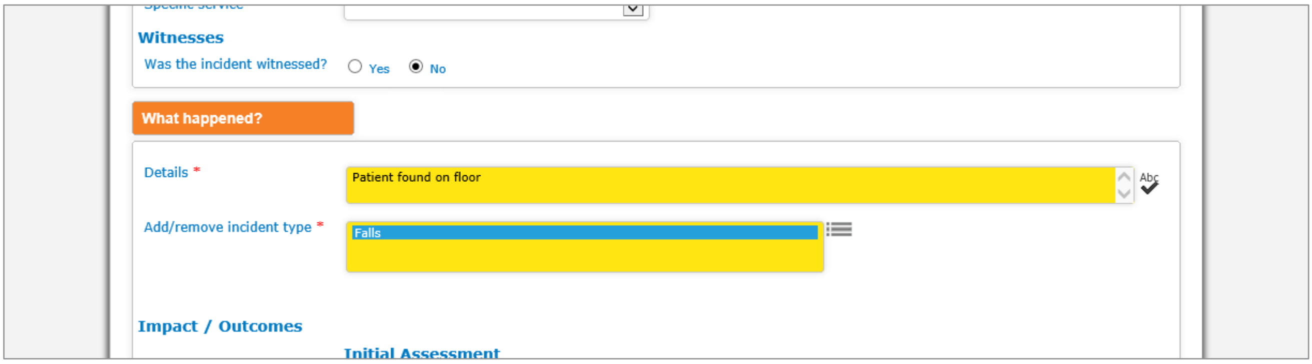
Using shortcuts to pre-fill new forms

Once you have identified a need to create a new shortcut, follow these steps to create it.

For this example, we are going to create a shortcut in the Incident register, for common patient falls in a particular ward.

Pre-fill all required information

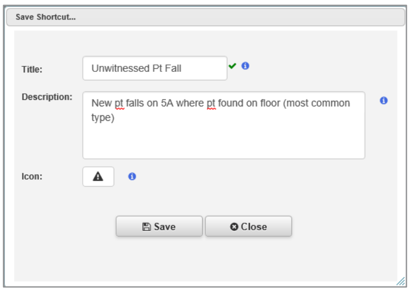
Start a new record in the appropriate register, and enter the details which will be consistent for every record based on this shortcut:



Create your Shortcut

Scroll to the bottom of the form, and click the **Create Shortcut** button:

Click **Save**



Shortcut Properties

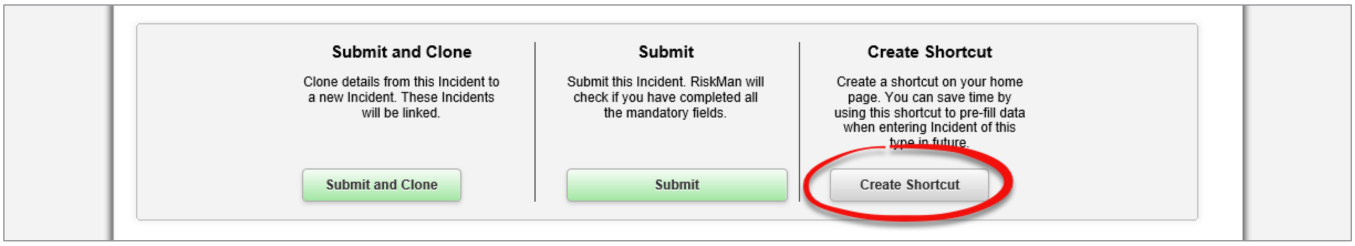
Title: The name of your shortcut as it will appear on your homepage.

Description: The description you type here will be displayed as a tooltip when you hover your mouse over the shortcut on the homepage.

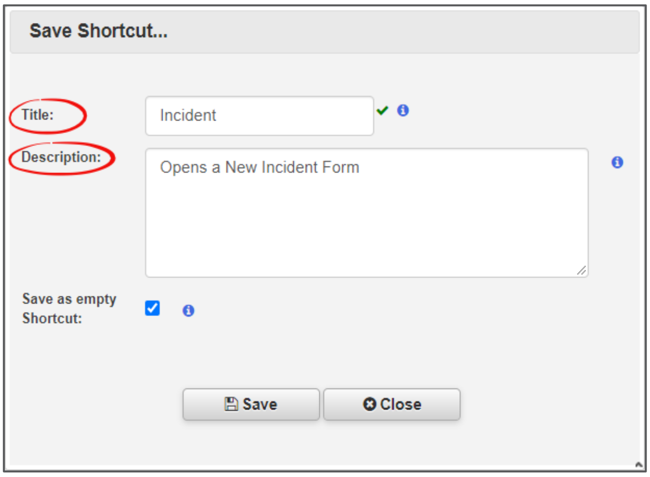
Icon: Choose an icon for this shortcut.

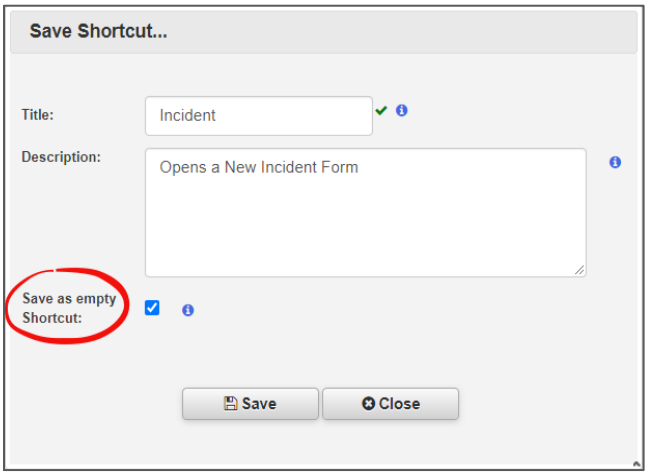
To create a blank shortcut (Open a new record from the homepage)

Scroll to the bottom of the form, and click the **Create Shortcut** button:



On the **Save Shortcut** page enter a Title and Description. A suggested title would be the name of the register you are creating the shortcut for. The description, to keep in line with other standard shortcuts would be "Opens a new Incident form".

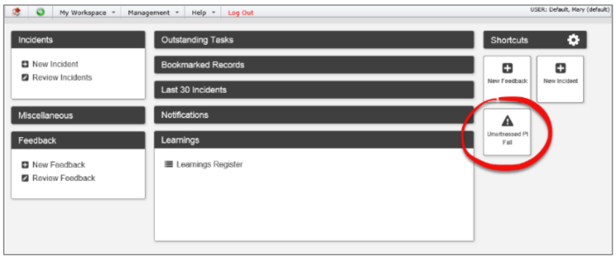




Click **Save as empty shortcut** followed by **Save**

Choose what to do next

Once you have created your shortcut, you will be taken back to (in this case) the incident entry form. This allows you to the chance to fill out an entire incident form, if that is what you intended to do before creating your shortcut.



If you only wanted to create your shortcut, you could navigate back to the homepage.

Updating the pre-filled content of your shortcut

If you want to update which information is pre-filled when you start a new record based on a shortcut, simply click the shortcut on your homepage.

Make any modifications you want to the form. When you navigate to the bottom of the page, you will see a button labelled **Update Shortcut:**

When you click the button, you will be presented with Shortcut Properties dialogue. Make any changes if required, and click the **Save** button.

Saving partially completed forms as Drafts and completing them later

If you have not completed all the mandatory fields on a form, and you need to leave your computer, you can save your progress as a **Draft**.

ⓘ Note

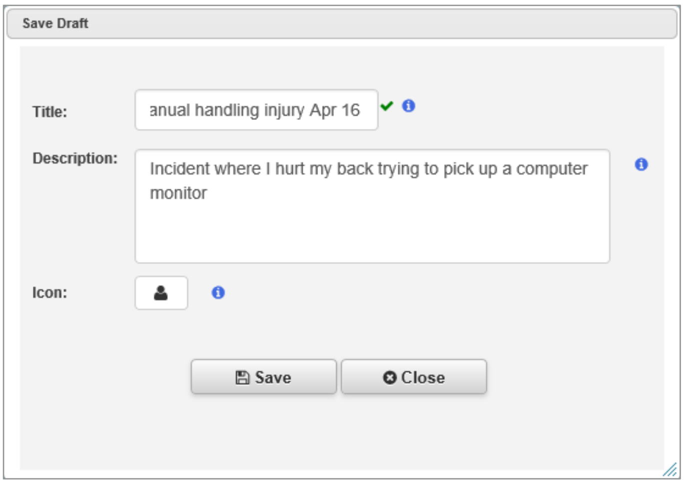
Depending on the configuration of your system, drafts might expire after a predetermined length of time, e.g. 14 days.

To save the current form as a Draft

Scroll to the bottom of the form and click the **Submit** button:

RiskMan will check to see if you have completed all the mandatory fields on the form. If you haven't completed all the fields, RiskMan will give you option of saving your progress as a **Draft**, or returning to the form to complete the remaining mandatory fields.

Draft Properties

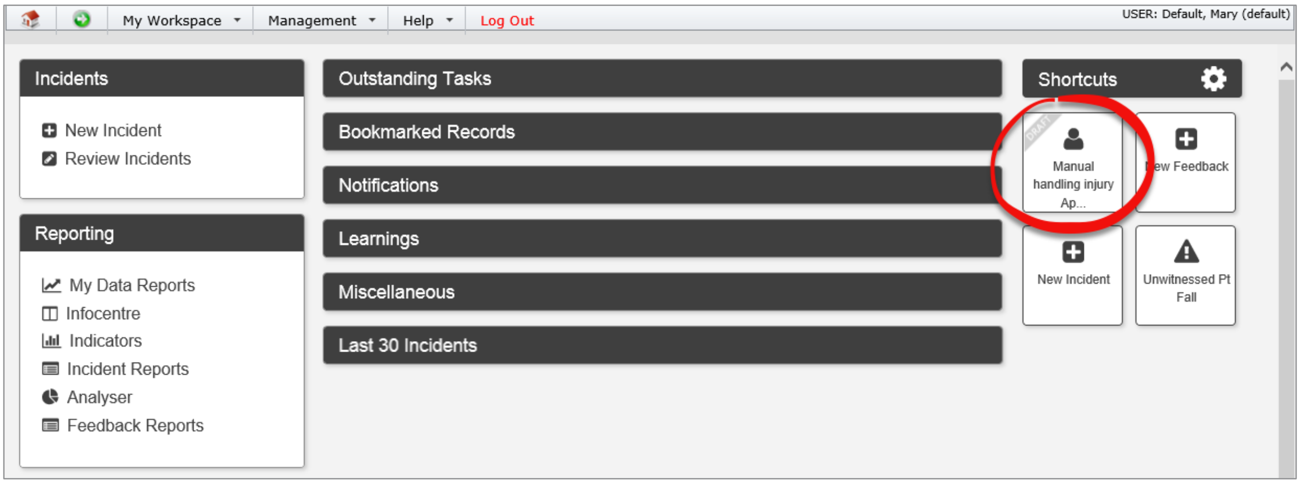


Title: The name of your draft as it will appear on your homepage.

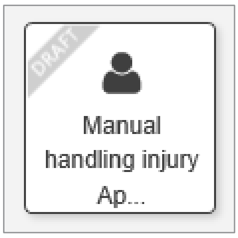
Description: The description you type here will be displayed as a tooltip when you hover your mouse over the draft on the homepage.

Icon: Choose an icon for this draft.

Once you save your draft, you will be returned to your homepage. Your draft is accessible from the shortcuts area:



Drafts are differentiated from Shortcuts by a "DRAFTS" banner in the top left corner of the widget:



If you want to delete a Shortcut or a Draft

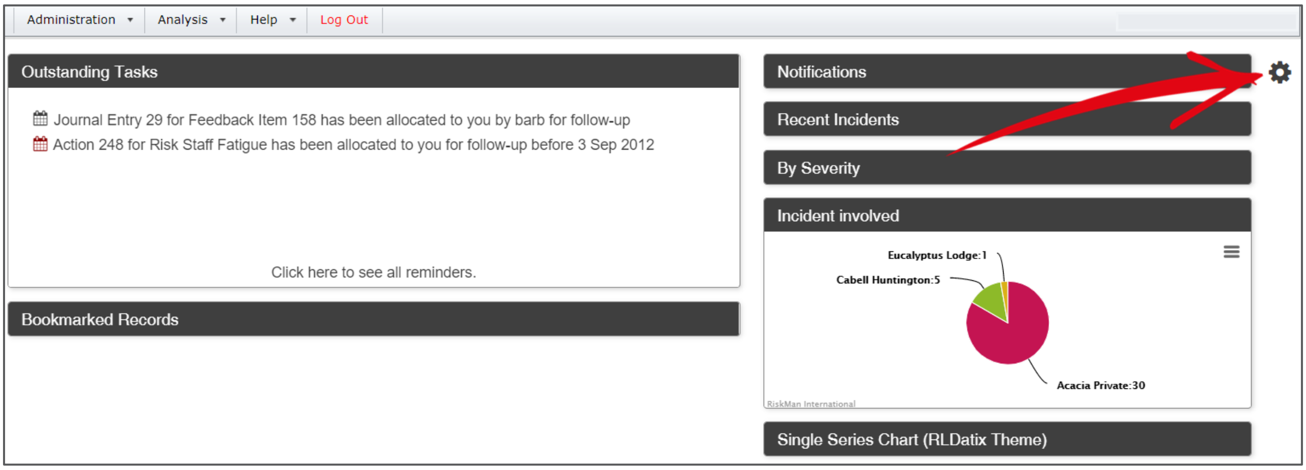
On your homepage, when your mouse cursor is over a Shortcut or Draft, you will see an **X** in the top right corner. Click the **X** to delete it. You will be asked to confirm that you want to delete it, as this action cannot be undone.

If you want to restore the widgets on your page to their default heights

Click the **Settings Cog** , and in the **Miscellaneous** section, click the **Default Widget Heights** button.

The Homepage without Shortcuts or Drafts

The Shortcuts menu will not display unless there are Shortcuts to display. The cog (settings icon) will be stand alone. This allows for more spacing withing the Homepage for visible Widgets displayed.



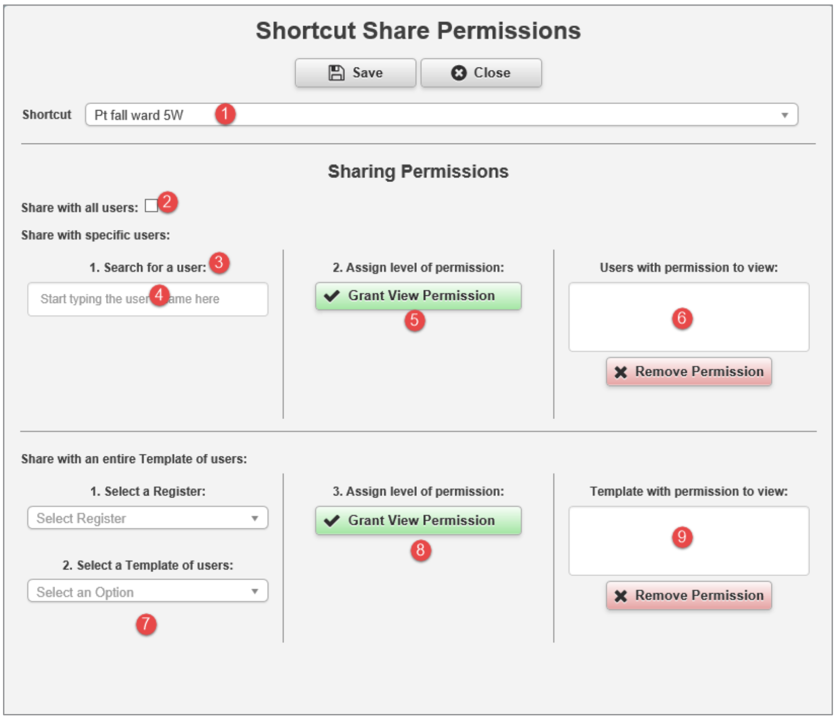
ADMINISTRATION OF THE HOMEPAGE

Sharing Shortcuts with other users

As an administrator, you are able to share shortcuts with other RiskMan users. This might be specific users, or an entire group of users from a particular Template in the system.

To share Shortcuts with other users:

Click the **Settings Cog** , and then click the **Share Shortcuts** button in the Miscellaneous section.



❶ Select the Shortcut you wish to share from the drop down box

❷ **Share with all users** – Check this box to grant permission for every user in the system to the selected shortcut. The **Share with specific users** section and list are now redundant and thus will no longer be visible.

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

- ❹ Start typing the name of a user. When you find the user you want, click their name.
- Click the **Grant View Permission** button ❺

- The user will be moved to the **Users with permission to view** ❻ list. You can also remove a user by highlighting them and clicking the **Remove Permission** button.

❼ **Share with an entire Template of users**:

- Select a **Register** from the drop down list. Once the Register has been selected, the respective **Templates** from that Register appear in the second drop down list. Select the desired Template of users.
- Click the **Grant View Permission** button ❽
- The Template will be moved to the **Templates with permission to view** ❾ list. You can also remove a Template by highlighting it and clicking the **Remove Permission** button.

Once you're finished, click the **Save** button at the top of the dialog box.

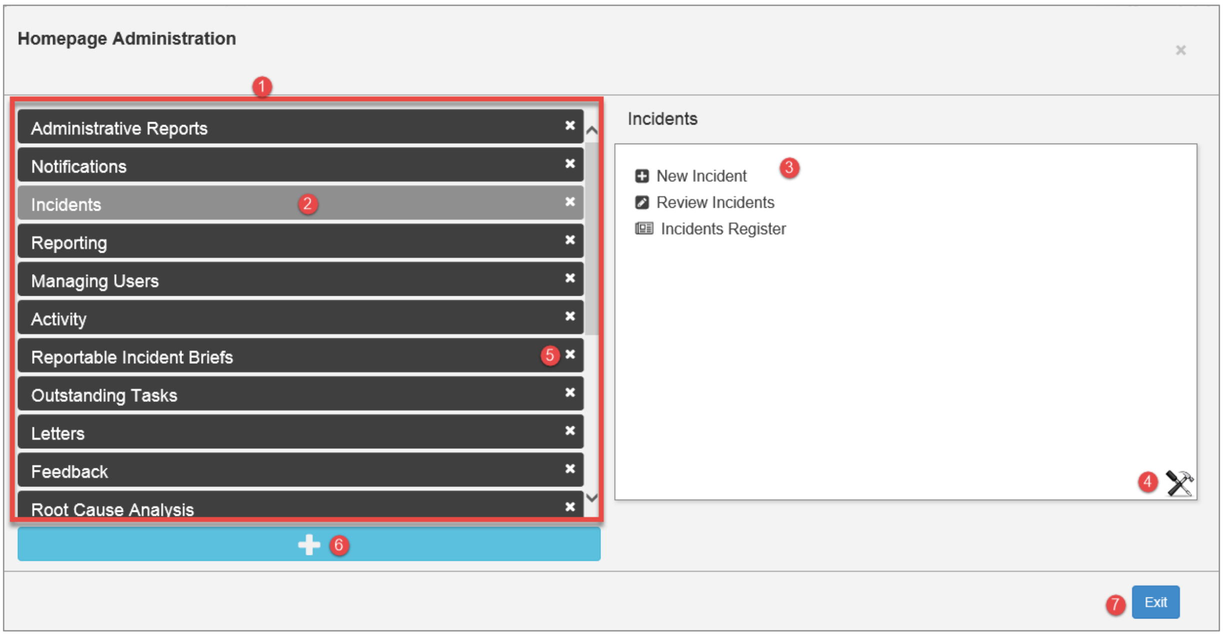
Maintaining the widgets shown on the homepage

As an administrator, you have a degree of control over the widgets available to be displayed on the homepage, and some of their properties.

To maintain the widgets available on the homepage:

Click the **Settings Cog** , and then click the **Homepage Administration** button in the Miscellaneous section.

The Administration Dialog



❶ This is a list of all the widgets currently available to users

❷ Click a widget name to select it

❸ The content of that widget is then displayed on the right side

❹ You can modify the properties of a widget by clicking the **Settings** icon

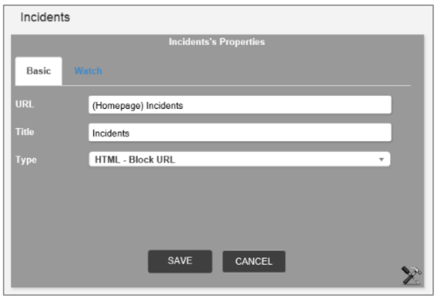
❺ You can remove a widget from the list of available lists by clicking its respective **X** here (note: this means that NO users will be able to see that widget anymore)

❻ Add a new widget to the list of visible widgets by clicking the blue **+** button

❼ Click the **Exit** button to return to your homepage once you are done

Modifying widgets containing functionality from the RiskMan menu

The only property you can manage for these types of widgets is the **Title**. For example, you may wish to change the title of **Incidents** to **Incident Register**, if you'd prefer.



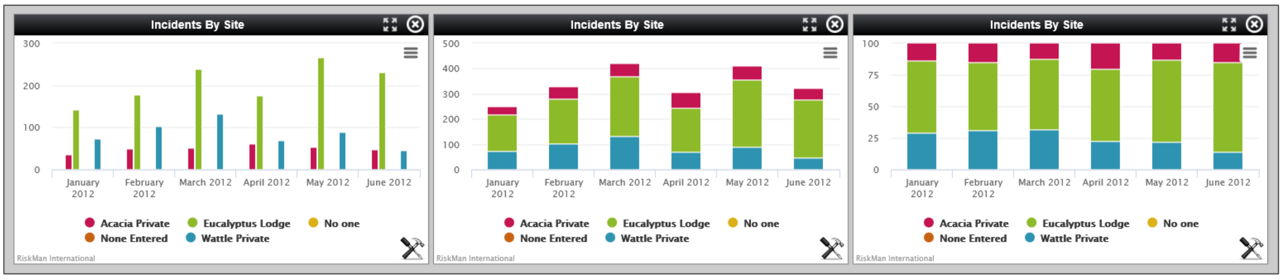
Once you have finished making changes, click the **Save** button.

Modifying widgets that contain charts (ie. InfoCentre Widgets)

The properties that you can maintain for InfoCentre widgets depends on the content type.

All Widgets: Change the Widget Title.
Pie Chart: Change the chart to present in 3D rather than 2D by adjusting the various settings.
Gauge: Adjust the colours and their positions on the gauge (much like indicators).
Single Series or **Multi Series Chart:** Change the chart type. Change the chart to present in 3D rather than 2D by adjusting the various settings.

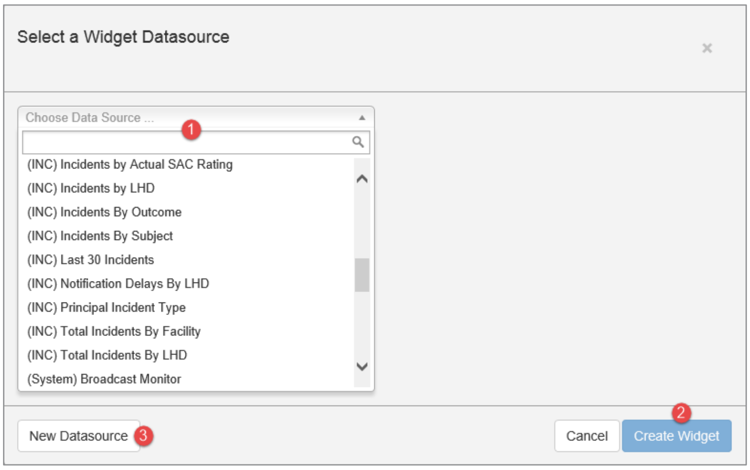
Multi Series Chart: Ability to use stacking to change the look of your chart.



- *The same widget with no stacking; standard stacking; and 100% stacking*

Adding new widgets to the list of available widgets

As an administrator, you are able to make more InfoCentre chart widgets available for end users. To do so, click the blue **Add** button (step **6** on the previous page). You are presented with the Select Widget Datasource dialog:



❶ This dropdown box contains all of the datasources to which you have permission. Start typing a keyword to search the list; results will be narrowed down as you type. Click the datasource name you wish to add once you find it.

❷ Click **Create Widget** to add it to the homepage list.

❸ If you cannot find a suitable datasource, and you have the permission to do so, you can click **New Datasource** and create a datasource using the **Datasource Builder**.

ⓘ Note

For assistance with creating Datasources, please refer to the Datasource Builder guide.

Permissions associated with the homepage

The following is a list of all the permissions users need to access the various parts of the homepage:

Required for homepage administration:

General tab > **Administrative Permissions**

- Can manage homepage

Shortcut permissions:

Any Register > **Basic Permissions**

- Can create shortcut
- Can share shortcut

Draft permissions:

Any Register > **Basic Permissions**

- Can create draft

Global Settings > Item Entry Defaults > Shortcuts

10) Draft shortcut expiry time (days)

ADDITIONAL INFORMATION & TIPS

If you want to make InfoCentre widgets available on the homepage, it’s a good idea to try and make sure they are reasonably broad in their purpose. Offering highly specialised charts will likely not benefit most users.

RELATED TOPICS

Datasource Builder