RLDatix™

- Using the Homepage -

FOR RISKMAN VERSION 2209

Last reviewed September 2022

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WHAT IS THE HOMEPAGE?

The Homepage contains links to all 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 can configure it in a way that's meaningful for them.
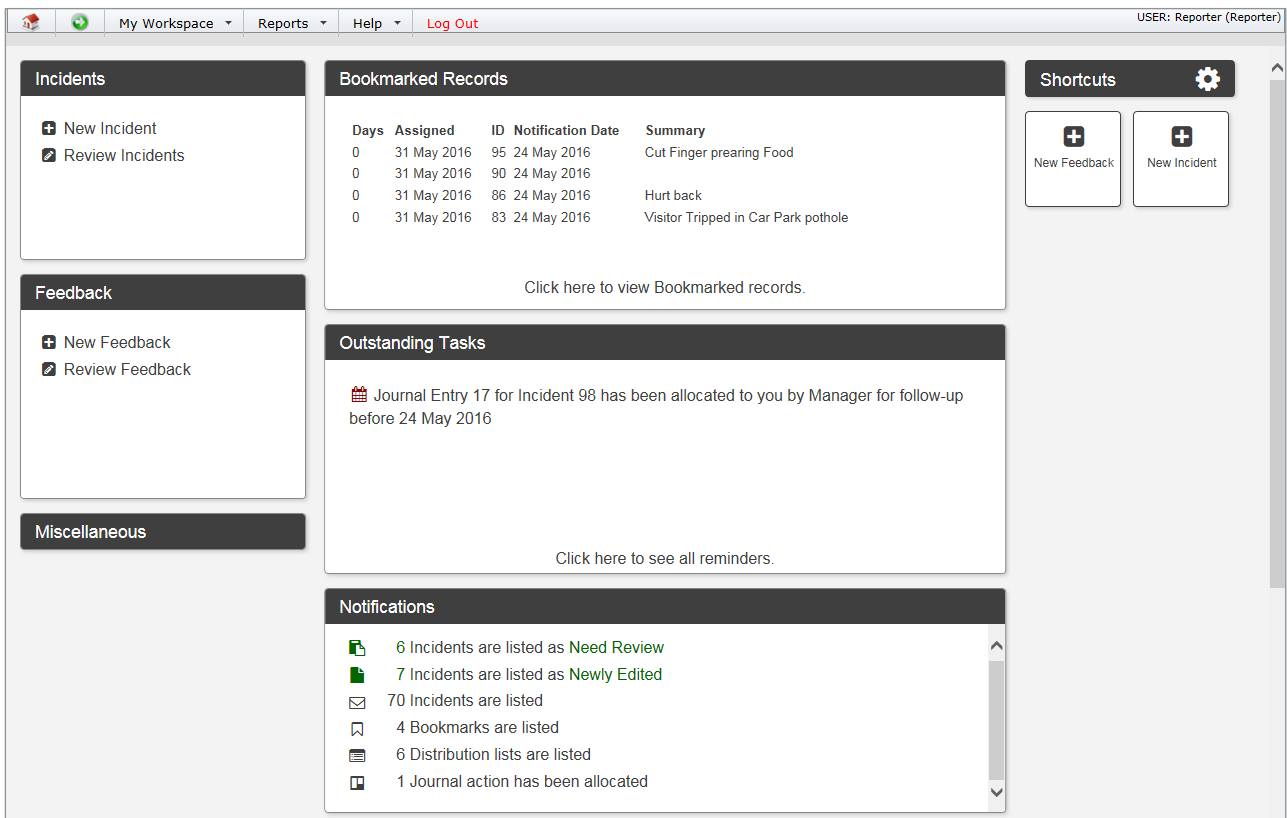
➔ How to access the homepage

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.

EXAMPLES

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

Default users might see something like this:

Using the Homepage

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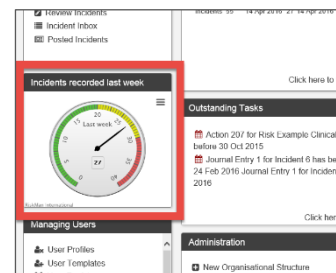
If you display any InfoCentre charts on your homepage, some might be configured to look at a particular date range. You can change the date range those widgets are reporting on by clicking the **Settings Cog** ⚙, and adjusting the date range as required.
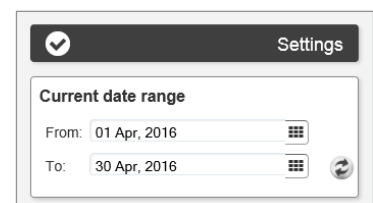
Shortcuts

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**

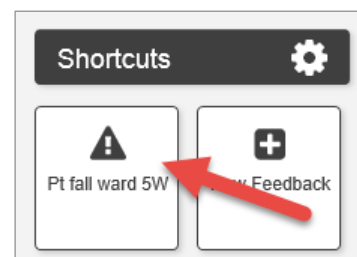*Shortcuts are a user permission and might not be in use in your system.*

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 has elapsed (depending on your system configuration).
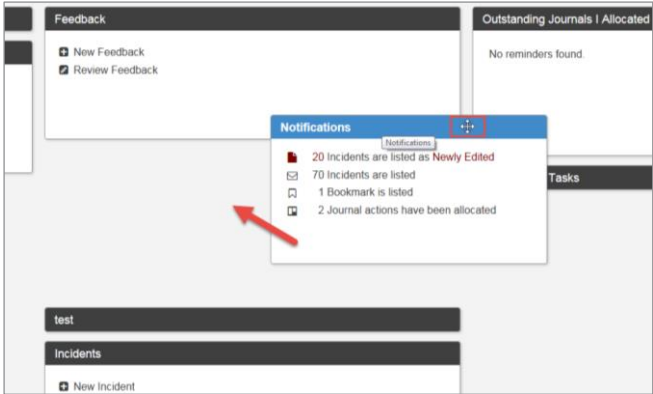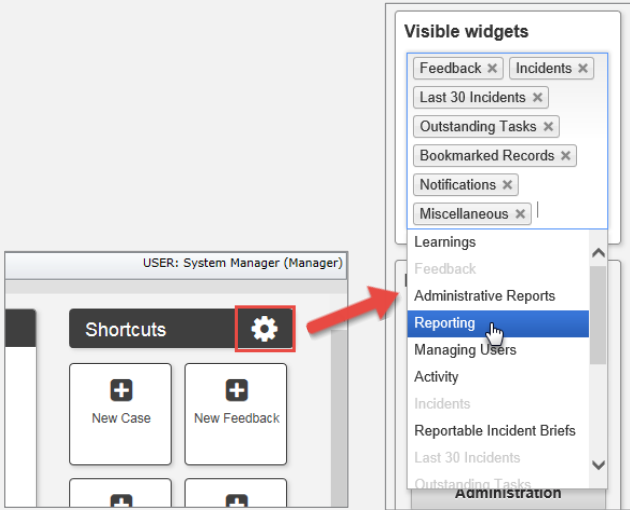
ⓘ **Note**

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	

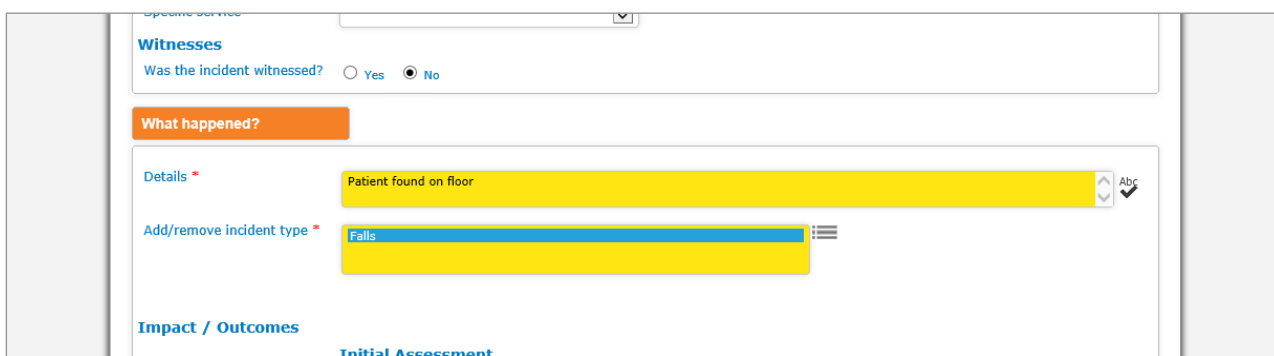|		
REMOVE WIDGETS	1. Click the Cog icon ⚙ to reveal the settings 2. In the **Visible Widgets** panel, find the Widget tag that is to be removed 3. Click the ⊠ icon	
RESIZE A WIDGET	To resize a widget, move your mouse cursor to the bottom of the widget until the cursor changes to the double arrows (shown 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.	
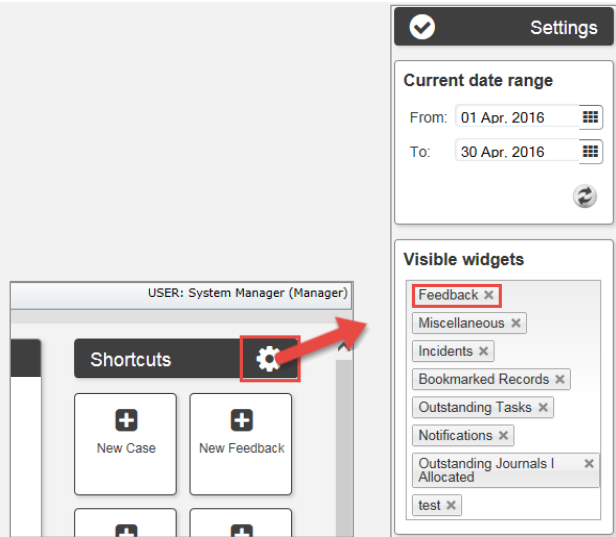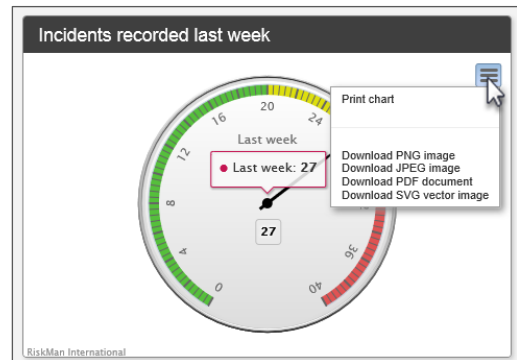
Using shortcuts to pre-fill new forms

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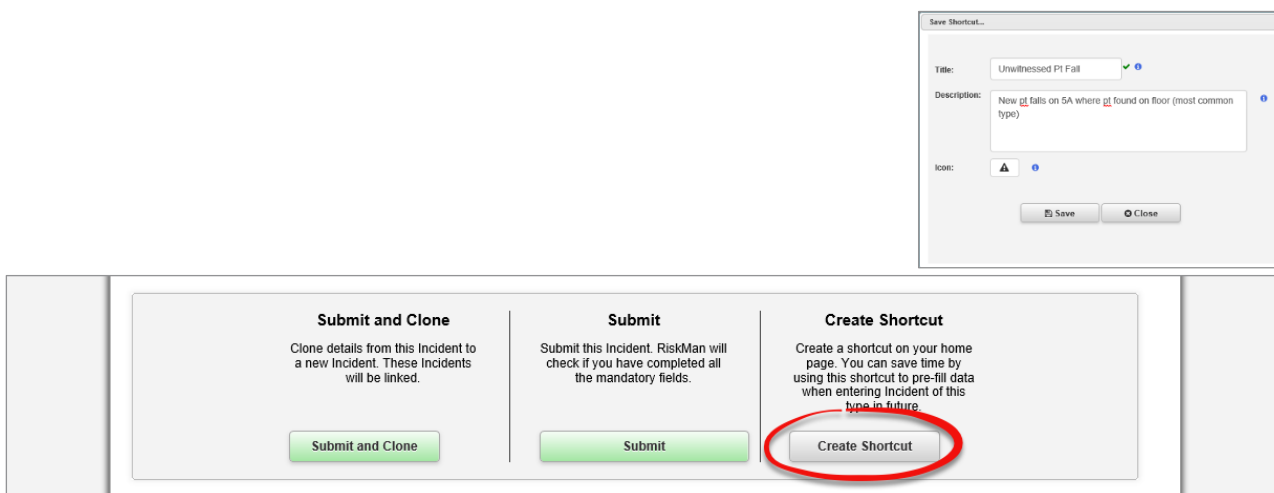
Start a new record in the appropriate register, and enter the details which will be consistent for every record based on this shortcut:

Create your Shortcut

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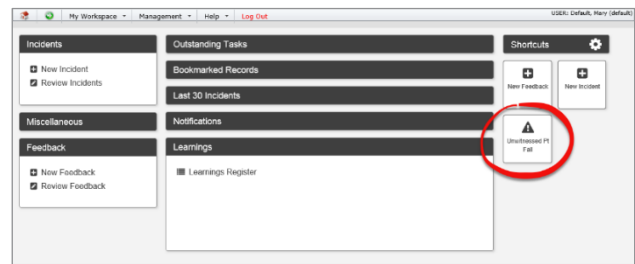
Using the Homepage

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.

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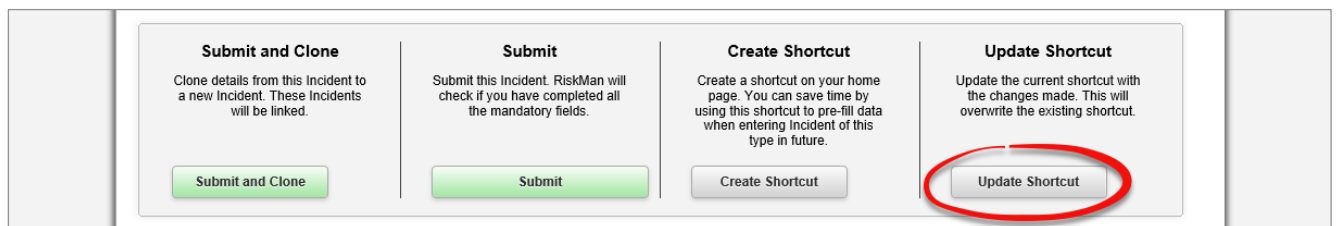
When you click the button, you will be presented with Shortcut Properties dialogue. Make any changes if required, and click the **Save** button.

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**.
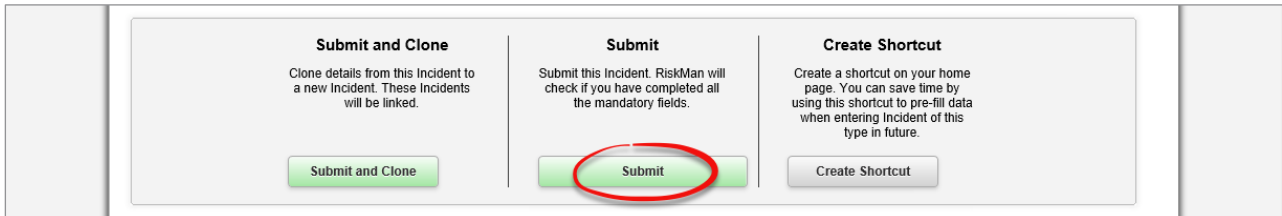
ⓘ Note

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

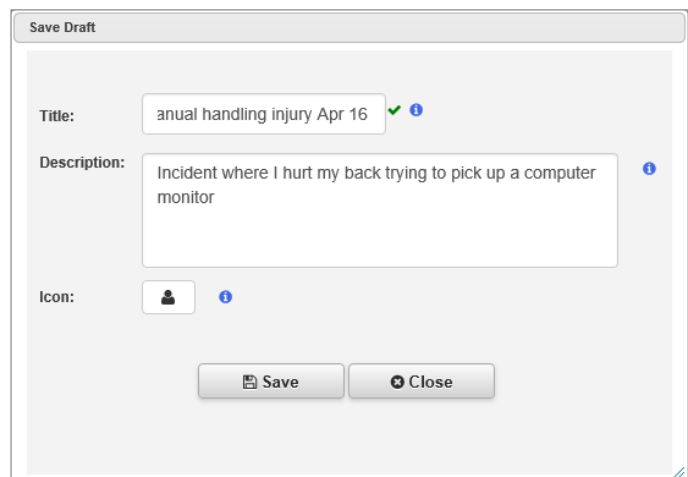Scroll to the bottom of the form and click the **Submit** button:

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.
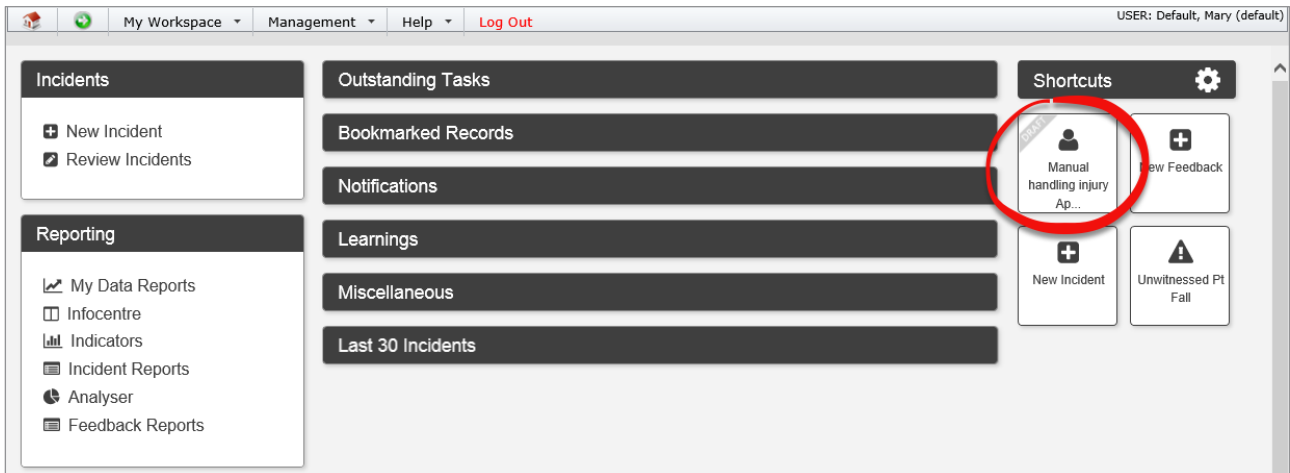
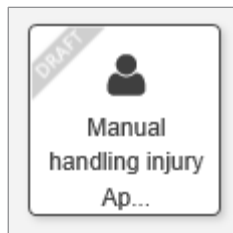**Icon**: Choose an icon for this draft.

Using the Homepage

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.