Introduction

This reference guide is aimed at RiskMan Administrators who will be responsible for maintaining all the Register *(e.g. Incidents, Feedback, Risks, Quality Activities)* and non-Register specific lists used in your RiskMan

What are the Lists & Codes?

The **List & Codes Maintenance** provides Administrators with the ability to view the content of all the list fields used in your RiskMan with access to editing, adding or deleting lists

In addition, users with the appropriate permissions can import list items from an Excel™ document saved as a CSV file into specific lists

What user permissions do I need to access the List & Codes Maintenance?

For a user to have permission to the **List & Codes Maintenance** page they will need the following permission

- **General Administrative Permissions:** Can maintain codes (e.g. Site list)

What user permissions do I need to import data into the List & Codes Maintenance?

For a user to have permission to import data into the Lists they will need to have access to the List & Codes Maintenance page and have the following:

- **General Administrative Permissions:** Can import list from Excel

- In addition the **Import** button needs to be enabled on the lists that you wish to import into

    Note: This requires assistance from RiskMan Support – https://hub.rldatix.com/SupportHUB/s/

How do I access List & Codes Maintenance?

1. From the menu select *Administration -> List & Codes Maintenance*

2. When some lists are selected you will see an information icon ❶. This will show additional about the list in question.
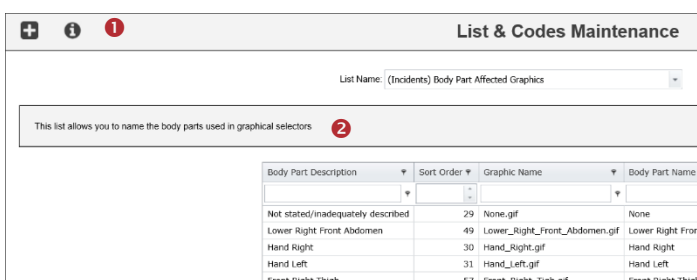
The maintenance lists are segregated as follows:

(Alerts) – Lists specific to Alert Management.

(Feedback) - Lists that are specific to the Feedback Register will be prefixed with (Feedback).

(Incidents) - Lists that are specific to the Incident Register will be prefixed with (Incidents).

(Quality) – Lists specific to the Quality Activity Register will be prefixed with (Quality).

(Risk Register) – Lists that are specific to the Risk Register will be prefixed with (Risk Register)

No prefix – All other lists that are either shared between the Registers or are non-Register specific e.g. pop-up messages targeted at individuals or all users on a template
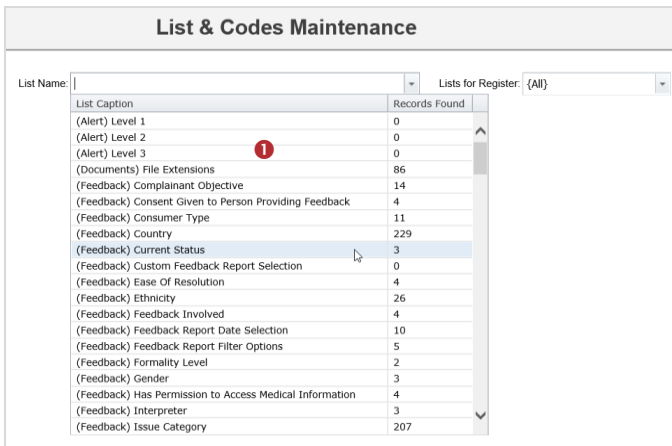
Note: Additional list items may appear in your List & Codes Maintenance, depending on what Registers you have available and any additional extensions that you might have available. These will either appear with no prefix or will have a related prefix e.g. The Register Name; Or the extension name e.g. (MET) for those who have the MET extension in their Incident Register

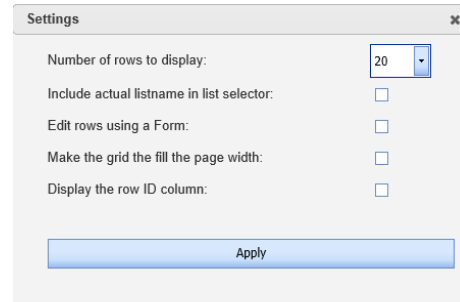## How do you access a list in the List & Codes Maintenance page?

1. If you want to narrow down your search, choose the appropriate register from which you want to alter your lists under **Lists for Register** ❶ If you want to conduct a general search, select {All}
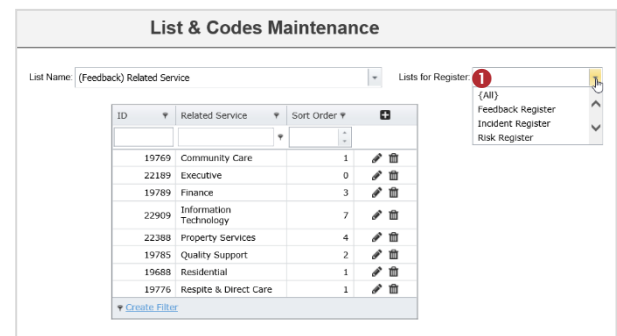
2. Select the relevant list from **List Name**. You can do this by either ❶scrolling down to find the applicable list name amongst all lists within the register or ❷ typing part of the list name you are looking for so the lists will be filtered accordingly.

3. The selected list will display

What general settings can be adjusted on the Lists & Codes Maintenance page?

Lists and Codes Maintenance contains several settings that can be adjusted to suit the user. To access these settings click on the ⚙ icon.


The below options will appear:

Below is an outline of each setting and its purpose. Select the options which are relevant to you and click **Apply**.

1. **Number of Rows to display** – Allows you to select how many rows are displaying per page

2. **Include actual listname in list selector:** – The default setting in Lists & Codes Maintenance is to show the **List Caption** or the friendly name of the list. This is the name that users can see when utilising the system (e.g. on an incident entry form). The **Actual Listname**, on the other hand, is the underlying database list name. If this option is ticked, you will see both the friendly name❶ and the actual listname❷ under **ListName**:
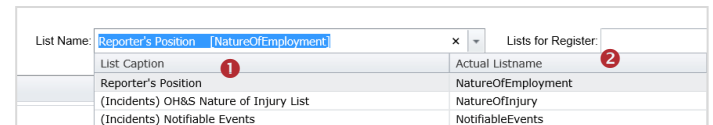
Please note that in the majority of cases users will not need to enable this setting as it is largely used for programming purposes only.
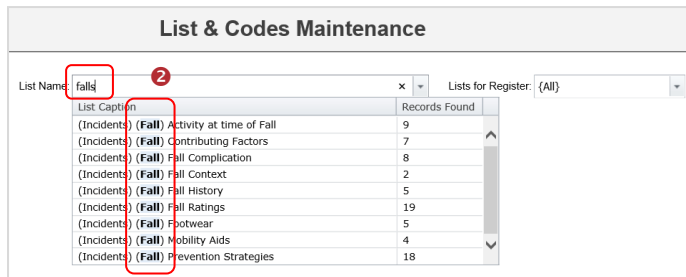
3. **Edit rows using a form** – This option allows the user to change the way lists and codes are edited.

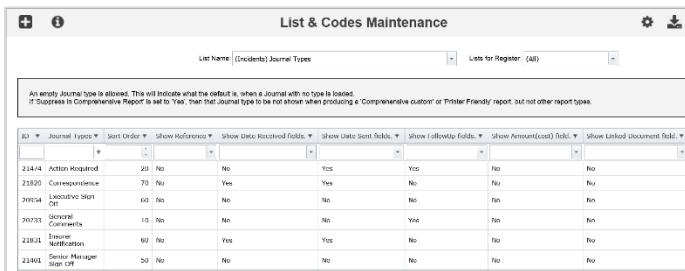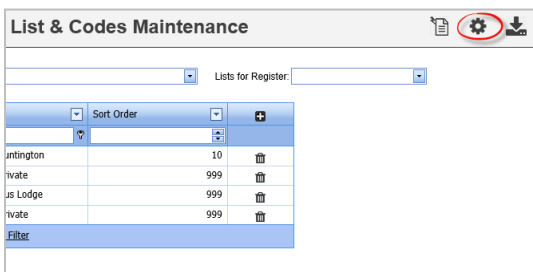   If the **Edit rows using a Form** option is selected, each list will have a ✏ ❶ (edit) icon next to it. By clicking on this icon, drop-down boxes for the relevant list will appear ❷ to enable the user to make any necessary changes with sufficient space. After any changes are made to the list, click on the ✅ icon ❸ to save. If you want to close the drop-down box for a list without saving changes, click on the ❌ ❹icon. Be aware that when using form edit mode, lists can only be edited and saved individually.

If the **Edit rows using a form** option is not ticked, lists and codes are edited directly via the text field❶. Multiple text fields can be edited before saving changes. After all relevant lists and codes have been edited, click on the

icon ❷ and all changes will be saved in bulk. To

revoke any changes made click on the icon ❸.

4. **Make the Grid width fill the page** – If this option is selected, the applicable Lists & Codes grid will take up the entire width of the page. If this option is not selected, the applicable Lists & Codes grid will only take up a small portion of the page.

Full width grid selected:

Full width grid not selected:

5. Display ID columns – Every row has an ID number which is a numerical value identifying the actual row containing specific information. If this setting is switched on this ID number will display. Please note that in the majority of cases this setting will not need to be enabled as it will be used for programming purposes.

ID		Employment		Sort Order	
21756		Administration		999	🗑
21875		AIN		999	🗑
20603		Business Office Manager		999	🗑
22357		CFO		999	🗑

After the relevant settings have been adjusted accordingly, click **Apply**.

How do I add a new list item?

1. Select a list from **List Name** e.g. Site and click on the icon ❶

2. If you have **Edit rows using a Form** *ticked* then an additional row will appear at the top of your listings as below:

3. If you have **Edit rows using a Form** *unticked* then additional rows will appear as below:

4. Enter the list name ❶ and the sort order ❷ if relevant. If sort order is not relevant then the list will be sorted in alphabetical order.

Edit rows using a Form unticked:

Edit rows using a form ticked:

When saving is required, the field will be highlighted in green. A message will also present next to the save and delete icons to remind users that an action is required for changes that have been made.

5. To save changes click the ⊘ icon

How do I delete a List Item?

1. Select the list from the **List Name** ❶

2. Click on the 🗑 ❷ icon next to the listing that you wish to delete

3. Once the list value has been deleted, you have the option to **Recover** the deleted value. This will ensure you have the option to reverse the action if needed. If you want to continue with deletng the value, proceed to step 4

4. Delete rows requires saving. Click on the ⊘ icon to confirm delete

Note: There may be some situations where RiskMan will not let you delete a list item as it is being used elsewhere e.g. Site lists if they are linked with a User's Profile Restrictions. If this is the case you may need to contact RiskMan Support to look at having your existing data re-mapped before you can delete the list item.

How do I edit an existing list item?

There are two different methods by which a user can edit an existing list item. Please refer to the section **What general settings can be adjusted on the Lists & Codes Maintenance page?** in this guide. Topic 2 *Use Form Edit* explains the different methods by which lists can be edited.

*Note: Changing or deleting an entry in a list simply changes the list entry – it does not alter any notifications/activities, user profiles, alerts or risks that have already been classified using the amended or deleted entry. **For example**: If the "Paediatrics" entry in the Programs list is altered to "Children's Health", any notifications/activities/items on file that were classified using "Paediatrics" will remain as "Paediatrics". Contact support at RiskMan Support – https://hub.rldatix.com/SupportHUB/s/ if re-mapping is required as a result of changing or deleting a list item*
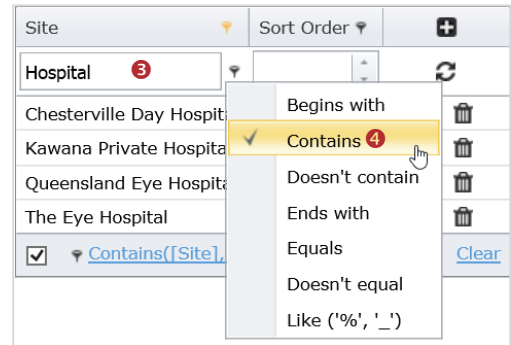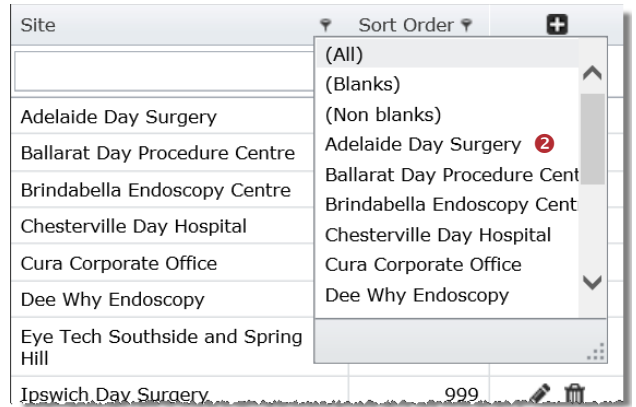
Can I sort my lists?

1. With a list selected, click on the **column heading** ❶

2. An **arrow** ❷ will appear next to the heading indicating the direction of the sort (ascending or descending)

3. If you wish to sort the column in the opposite direction click on the **column heading** ❶ again

Can I filter my lists?

There are two methods by which you can filter your lists:

1. With a list selected, click the Filter ⬚ icon *next to the column heading* ❶ A drop down list of available filtering items ❷ will display. This will include blanks, non-blanks and the name of each list item.

2. With a list selected, click the Filter ⬚ icon *next to the blank space below the column heading* ❸ A drop down list of available logical tests will display. This will include begins with, contains, doesn't contain, ends with, equals, doesn't equal and like. After selecting the appropriate logical test, type in your filter criteria ❹ and press enter.

❶

Note: This might be useful when you are looking at your Site/Location lists and you only want to view the Locations for a particular Site

To remove a column filter

1. To remove a top filter, click on the Filter ⬚ ❶ icon next to the column heading and select **(All)** ❷

2. To remove a bottom filter either:

    a) Manually delete all the filter conditions under the column heading ❸ and press ENTER

    b) Click on the ⬚ icon ❹

Note: Assistance from RiskMan support will be required to obtain the List Names

Example of the CSV file for the Site/Location list
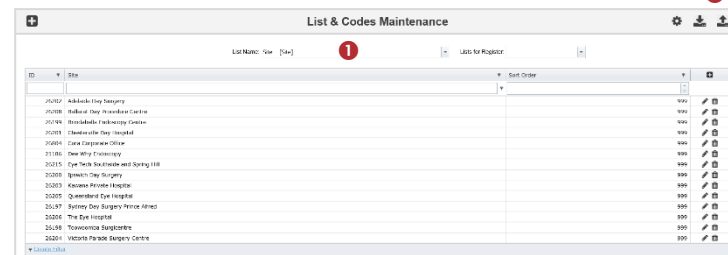
1. The **Name** of the list needs to be included as the **first** column in your **CSV** file	2. All other lists must correspond to the lists displayed in the respective List & Codes Maintenance list

To import data into a list

1. Select the list from **List Name** ❶

2. Click on the **Import** ❷ icon

*Note: The **Import** button will only be available on a list with the aid of RiskMan support*

3. A pop-up will appear with a list of options

- Test Only – this is where you can test if the Spreadsheet from which you're importing is valid or not before importing the data. If the file is valid it will state *List validates correctly*. If the file is not valid it will state *Invalid File type*.

Can I export my lists to Excel™?

1. Arrange your selected list e.g. sort or filter

2. Press the **Export** ❶ icon

3. You will have the option to save or open Excel™

4. If you select **Open**, your maintenance list will open in Excel™

5. If you press **Save**, save your list. You will then have the option to open your list

6. If you have filtered your list, only the filtered items will be displayed in the Excel™ document

Note: If changes are made to the list in Excel™ you can import your data back into the list in RiskMan – refer to the section "How do I import data into a list?"
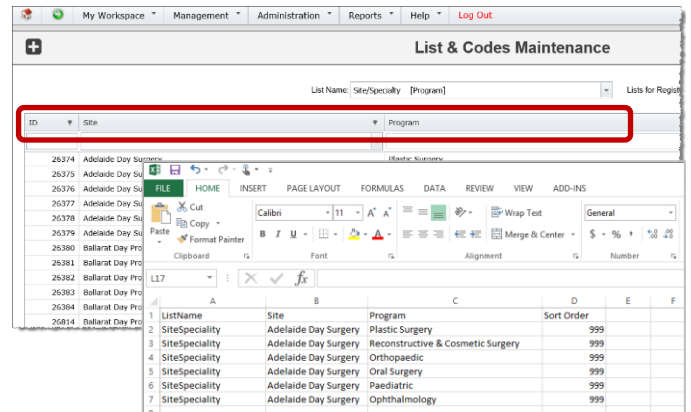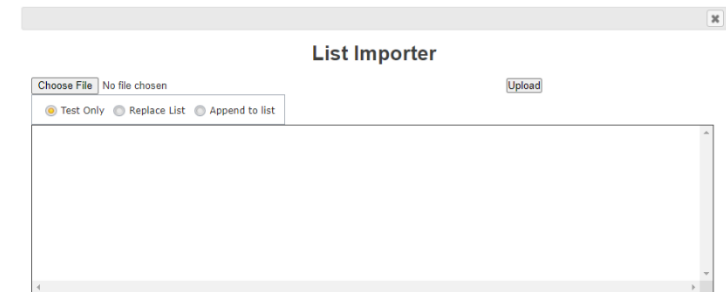

How do I import data into a list?

Data file requirements

- The file you are importing **MUST BE** a **CSV** file (this file format is saved from an Excel™ spreadsheet)

- The content of the data **MUST** contain the **SAME** heading names as the list you are importing to, In addition the **NAME** of the list e.g. SiteLocation, **MUST** be included in your CSV file

- Replace List – this is where you import the applicable Spreadsheet to your current list and replace it with the existing data

- Append to list – this is where you add data from the applicable Spreadsheet to the current list so that the list now contains both existing and appended data

4. Locate the **CSV** ❸ file that contains the data you wish to import

  - **Only check the Replace** existing data ❹ option if you are replacing your list with your new list, otherwise the imported data will be appended to your existing list

  Note: If you do replace your list with a new list you may wish your existing data e.g. Incidents, Feedback, Risks, Quality Activities, User Profiles or any other Registers to be remapped to your new lists. If this is the case contact RiskMan support – *https://hub.rldatix.com/SupportHUB/s/*
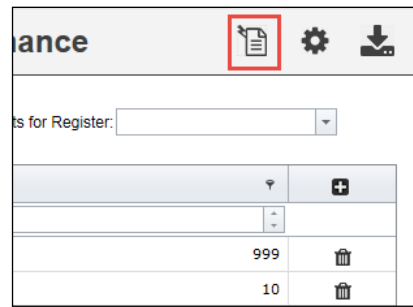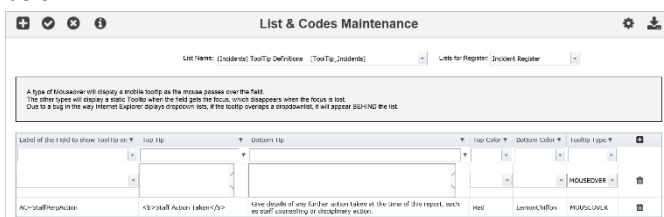
5. Press **Upload** ❺

6. Your list will be updated
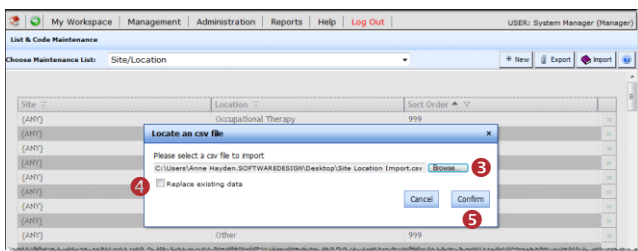
Administration Icon

The Administration icon is available to access Lists and Codes that are not available to Administrators. The icon is presented for RiskMan support purposes to allow the RiskMan support staff to access these lists if required.

If you have selected **Use Form Edit**, your screen will look as below:

The function is password protected and only a password generated by RiskMan will access the tool.

Tooltips

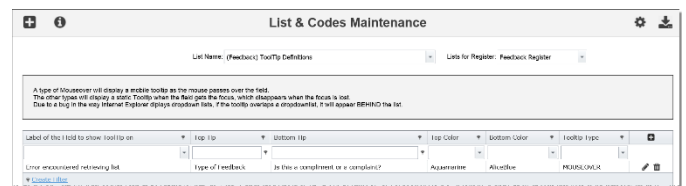Tool Tips are available on fields and in some cases buttons on the Register Entry form and can be created through the List Maintenance page by selecting the respective ToolTip Definitions list
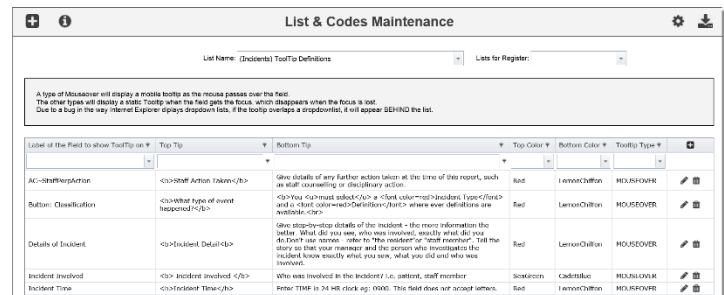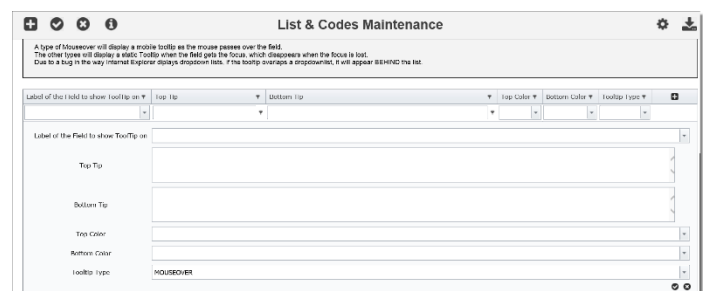

Example: Incident Tool Tips
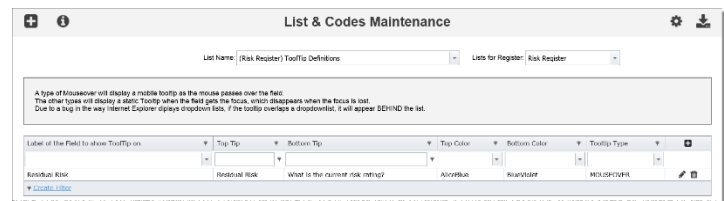
Example: Risk Register Tool Tips

Example: Feedback Tool Tips

To create a new tool tip

1. Click on the icon ❶

Regardless of which setting you are on, the field options will be the same.

Label of the Field to show ToolTip on: Select the field or button that you wish to associate the Tooltip with

2. **Bottom Tip:** Enter the description for this tool tip.

3. **Top Color:** Select a colour for your Top Tip

4. **Bottom Color:** Select a colour for your Top Tip

5. **Tool Tip Type:** There are 4 types of tool tips that you can select - it is recommended to select MOUSEOVER

To appear as an option in this list, a Template must exist under the 'General' tab or in the 'Incidents' register.

This list will have no effect on users created by an administrator.

Using HTML Codes to enhance your Tool Tips

Your tool tips can be enhanced by including one or more of the following: bold, underline or italicise words; add paragraphs; add line breaks; add bullets and numbering to separate text within a tool tip. Simple HTML code can be used to include these enhancements. On the next couple of pages are some examples of Incident Tools tips using HTML Code which you can replicate in your RiskMan
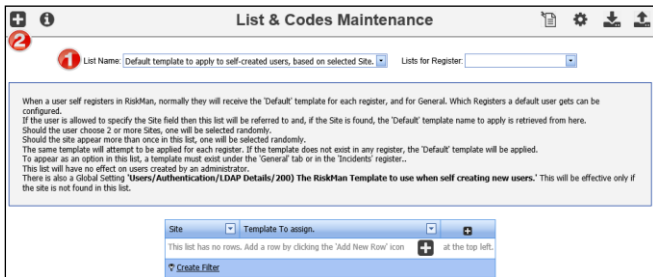
TOOL TIP EXAMPLES FROM THE INCIDENT REGISTER

| Tag	Example using the Tags	Sample tool tip
Bold 	****Notification Date****	**Notification Date** The Date The Incident was Notified to Group Clinical Governance.
Italics 	****risk**** or ****risks****	**Click here to associate a risk with an incident** Please select the *risk* or *risks* that this incident relates to
Underline <u>	**<u>**risk</u> or <u>risks**</u>**	**Click here to associate a risk with an incident** Please select the risk or risks that this incident relates to
Bold/Italic 	****Not Required****	**Action Taken** Specify any action taken to prevent a recurrence of this type of event. If no action is necessary, write ***Not Required***
Line break 	Nominate the severity of this incident, using the Incident Severity Rating document. ** ** To view and select an Incident severity rating for this incident, click on the icon next to this document.	**Outcome** Nominate the severity of this incident, using the ***Incident Severity Rating*** document. To view and select an Incident severity rating for this incident, click on the icon next to this document.
Paragraph Break with line of space <p>	Nominate the severity of this incident, using the Incident Severity Rating document. **<p>** To view and select an Incident severity rating for this incident, click on the icon next to this document.	**Outcome** Nominate the severity of this incident, using the ***Incident Severity Rating*** document. To view and select an Incident severity rating for this incident, click on the icon next to this document.
Horizontal Rule <hr>	Nominate the severity of this incident, using the Incident Severity Rating document. **<hr>** To view and select an Incident severity rating for this incident, click on the icon next to this document.	**Outcome** Nominate the severity of this incident, using the ***Incident Severity Rating*** document. ――――― To view and select anIncident severity rating for this incident, click on the icon next to this document.

More advanced examples on the next page

Tag	Example using the Tags	Sample tool tip
Bullet points **<UL>** **<LI>**	** **Minimal: No harm, injury, loss or increased care.** ** ** **Minor:Injury, harm or loss sustained requiring increased care, observations.** ** .... ** **……………. a significant event.** **	
Number points **<OL>** **<LI>**	** **Minimal: No harm, injury, loss or increased care. ** **Minor:Injury, harm or loss sustained requiring increased care, observations.** ** .... ** **……………a significant event.** **	

Defining templates for self-registered users

1. Click on the **List Name** drop down and locate **Default template to apply to self-created users, based on selected site** list

2. Click on the ➕ icon

3. Select the **site** and **template to assign** for that site

4. Save or Discard the changes

There is also a Global Setting **'Users/Authentication/LDAP Details/200) The RiskMan Template to use when self-creating new users.'** This will be effective only if the site is not found in this list.
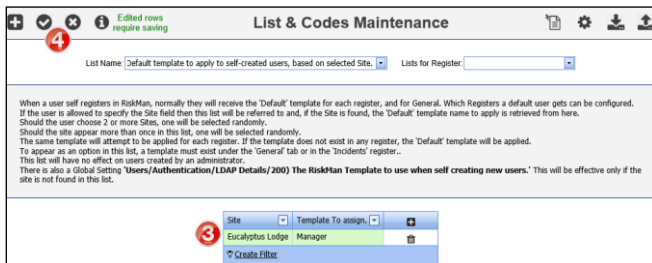
During self-registration, if the user is allowed to specify their own site, then the above list will be referred to and, if the site is found, the Tempalte the user should be allocated to is retrieved from here.

Should the user choose 2 or more Sites, one will be selected randomly.

Should the site appear more than once in this list, one will be selected randomly.

For each Register, the system will attempt to assign he user to the defined Template. If the Template does not exist in a Register, the user will be assigned to the 'Defulat' Template instead.