Introduction

This reference guide is aimed at managers who will be responsible for managing users within RiskMan where RiskMan is not configured to use network logins. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from the *Help -> Reference Guides*

Note: Some of the naming conventions used in this document may not be the same as the ones in your RiskMan system; however, the concepts will still apply

How do I access the User Profiles to create, modify or delete a user?

To create a new user you will need to navigate to the Administration -> User Permissions -> User Profiles page

		User Profile	es (General)			
elect User:			User Registry	Save User	New User	Delete User
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RiskMan Use	r Type Filter:			Rebuild 'Select Us	er' List Now	
RiskMan Use User Positio	r Type Filter:	 ▼ ○ Only Show Expire ▼ ○ Only Show Delete 		Rebuild 'Select Us	er' List Now	

The User Profiles page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risk, Quality Activity; with an additional non-register specific tab called **General**. Depending on your permissions you may see all tabs or just some of these tabs

The **General** User Profile is used to assign User permissions and Restriction Details that are common across all Registers as well as the Administrative Permissions

The information under each of the tabs allows you to, create or modify a user and also to activate/de-activate a user for a particular register. Users that no longer work for your organisation are deleted under the **General** tab only. Below are the definitions of the sections that are included under the Register tabs:

- Filter fields Used to search for an active, deleted or expired user or users who have no permission under the specific Register User Profile e.g. Risk
- Login Details Used to enter the details of a new user or modify the details of an existing user
- **Current/Pending Delegation** Used to create a delegation on behalf of another user (this section will only display if the user has the appropriate permission)

- Restriction Details Used to restrict users' entry/ update or reporting of notifications/items/activities based on common fields throughout RiskMan e.g. Site/Region & Campus/Location restrictions
- Specific Restrictions (<u>not available</u> under the General and Feedback tabs) - Used to restrict users' entry/update or reporting of notifications/items/activities for a specific Register

Note: The Feedback User Profiles will have a Restriction Details section which will contain a combination of common and Feedback specific restrictions

- Field Settings (<u>not available</u> under the General tab) -Specify the status of a field e.g. Hide, Entry Required, Read Only, Optional Entry on a specific Register. Field Settings are usually dictated by the user's assigned template
- User Permissions Specify a user's permissions that are either common across all registers e.g. administrative permissions (this is done under the General tab) or specific to a Register. User Permissions are usually dictated by the user's assigned template

Clients who have a User Licence

If your organisation has a User Licence rather than a Site Licence you will be limited to the number of users that you can create in RiskMan.

If the number of users is close to the maximum or you have reached the maximum, the following message will appear at the top of your User profiles page.



If you have reached the maximum number of users you will be able to delete and modify existing user but <u>will not</u> be able to create a new user. You will have the option to purchase more licences by contacting RiskMan International Pty Ltd, or delete users that are currently not using RiskMan

How do I create a New User?

Users can be setup under any of the tabbed sections of the User Profile. However, when you do create a user, depending on your RiskMan setup, a user may only be activated for specific Registers e.g. Incident & Feedback, but not activated under the Risk or Quality Activity Registers. All users will be activated under the **General** tab

In this guide, it will be assumed

- A user is always activated under the Incident & Feedback Registers but not under the Risk & Quality Activity Registers
- The person creating, modifying or deleting a user has access to all the Register and General User Profiles

Creating a User

If you do not have permission to all the Register & General User Profiles, a user can be created under one of the Register tabs or the General tab.

Where a user is automatically activated e.g. under the Incident, Feedback & General tabs, they will be assigned the **"Default"** template. This will give the user the minimum access to RiskMan

If you wish the user to be assigned a different template then you will need to move between the Registers & General tab to assign the appropriate template

If your role is to provide Administrative support to RiskMan then we suggest that you have permission to all the Register and General User Profiles

General tab

The General User Profiles only contains the

- User permissions that are common across all Registers
- The Restriction Details that are common across all Registers
- The Administrative Permissions
- 1. Under the General tab press the New User 0 button

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		User Profiles (Gen	eral) 🔞 🚺
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User Has Facility Restriction:			d/Expired Users from search:
Login Details	2		
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Do you want to change Passwo	alt 🗆 tott choren de Norme		Reapply the above template permissions
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Force Change Password:			
Email Address:			Alternate Email Address:
Phone Number:			Hobile Number:
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Edit Delegation Has Delegated Authority To Da Not Delegated		Not A Delegate	Date To Start Date To End
Restriction Details	<u> </u>	is section are shared between all modules.)	
Entry/Update Restrictions			
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Reporting Restrictions			Filter List
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		Filter List	
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Administrative Services Ambulatory B. Community Ser carpark Finance Human Resources Information Technology Servi		Acute Aged Care Service Allergy, Immunology & Respiratory Anaesthese 853 Burns Cardiology Cardiotherack surgery	Aged Care Services. Aged Psychiatry Services. Alled Health Missional Services Cardowave A Responsery Directorate

2. Enter the user's details in the Login Details 2 section

- Username: Suggest using the same naming conventions as your network logins
- Password: Your Administrator has the ability to set the complexity and expiration of passwords used for RiskMan Standard accounts if desired. The settings can be modified via *Configuration > Global Settings > Users > Password Management*. Please refer to the Global Settings Descriptions Document for a detailed explanation for configuring password complexity rules. Below is some additional information about RiskMan passwords:
- You can opt for passwords never to expire in a User Profile. This will override any password expiration setting you have enabled in the Global Settings:

CRLDatix RISKMAN REFERENCE GUIDE TO USER MANAGEMENT (Non-Network Logins)

System Manager
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- Passwords are case sensitive
- Password recovery is not possible; if a user has forgotten their password it will need to be reset
- You can force users to change their password when they log in for the first time:

Login Details	
User Display Name:	Lauren
User Name:	Lauren
Do you want to change Pas	sword: 🗌 Last Changed:
Password Never Expires:	
Force Change Password:	

When this box is checked, the next time the user logs in to the system, they will be required to create a new password for their account before they can continue. This change is not controlled by any settings and will be applied automatically.

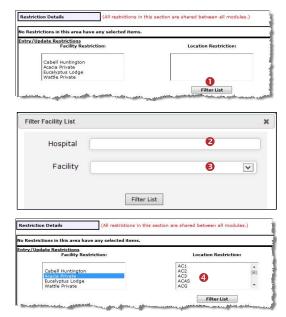
- Users can change their password if they want. However, if a user wants to change their password they cannot use any of their last 12 passwords. This change is not controlled by any settings and will be applied automatically.
- It is possible to add to the ability to prevent users from changing their password too frequently. When enabled, users will only be able to change their passwords once a day. This prevents users, when forced to change their password, from imediately changing it back. This is controlled by Global Settings (See Global Settings guide).
- It is possible to lock out users who enter the wrong username and password combination successive times. The number of times they can enter the wrong combination before lock-out is defined in Global Settings (See Global Settings guide).
- Email Address: It is advisable that all managers have an email address registered with their User Profile so they can receive email notifications from RiskMan
- This user's RiskMan User Type is S: Select the template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All restrictions under the Restriction Details section will either need to be manually selected for that user, or will need to be applied through the "Apply Template Changes" option which will affect all users on that template - refer to the RiskMan User Templates Guide

- Start Page ④: A default start page (the page the user will be presented with when they first logon to RiskMan) may display depending on the assigned template. This can be changed if required
- If required, select the user's overall Restriction Details
 i.e. the restrictions that are <u>common</u> across all Registers. Once selected, they will be applied across all Registers
 - Entry/Update Restrictions: If the user can only enter or update Register specific notifications/ items/activities based on Sites and/or Locations, select accordingly. To select more than one item in a list hold your CTRL button and click on the list items

To view the Location restrictions

- Click on the Filter List button 1 under the Location Restriction box
- In the pop-up window, select the Site 2 and press the Filter list 5 button
- The list of Locations will populate into the **Restriction Details** section
- Highlight as required (Hold CTRL key if you wish to select more than one Location)



 Reporting Restrictions: If the user has access to running Register specific Reports, you can restrict their access to what they can view in the report based on any of the displayed fields.

To view the Location restrictions, follow the steps described above under the Entry/Update restrictions

Note: Additional **Entry/Update** and **Reporting Restrictions** can be added under the **Specific Restrictions** section under each of the Register User Profiles. The Specific Restrictions section is not available under the **General** tab

4. To save the user, press Save User 3

Assign a Register Specific Template for the New User

Once the user has been created under the **General** tab, you will need to move between each of the other Registers to ensure the user has the correct permissions to the other Registers, where applicable.

The following pages describe setting up the new user under all the Registers that the user will have permission to access.

Note: Because RiskMan is configured according to the requirements of each client, the following scenario may not directly apply to you. It is likely that you will have fewer or more Registers than what is depicted in this User Guide.

Incident tab

0

Click on the Incident tab

 and the newly created user will be displayed (we have assumed the user is automatically active under this Register)

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Iner Display Name:			This user's position i		1
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- 2. Assign the appropriate Incident Template in the Login Details section
 - This user's RiskMan User Type is ②: Select the Incident template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide**

- Start Page S: If this was selected under the General tab it will also display here. If not, you can select a start page from this list.
- Restriction Details (): If the user does not have any Restriction Details then this section will be collapsed.
 - To expose the **Restriction Details** section click on the section click on

Oetails (All restrictions in this section are shared between all modules.)

 If the user has restrictions this section will be exposed. If you make any changes to these 8

restrictions they will affect all Registers the user is active under (as these are the common restrictions)

Location Restriction:	
Filter List	
Location Restriction:	
Filter List	
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Allergy, Immunology & Respirat	Aged Psychiatry Services. Allied Health
	Filter List Lecation Restriction Filter List Filter Lis

- 4. **Specific Restrictions (5)**: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and/or Journal Type Restrictions as required
 - Show Only "Alerted" Incidents in Inbox: This
 option should <u>only</u> be checked if the user has
 access to the Incident Inbox (e.g. Risk/Quality
 Managers) and should only see incidents they have
 been alerted to
 - Show Only "Alerted" Incidents in Reports: This
 option should only be checked if the user has
 access to the Incident Reports (e.g. Risk/Quality
 Managers, Executives, Line Managers) and can
 only report on incidents they have been alerted to
 - If you restrict the list of reports the user <u>WILL NOT</u> have access to the Incident Custom Report Builder on the Incident Reports page to create, modify or delete Custom Report Layouts
- 5. To save the user, press Save User 6

Feedback Tab

Click on the Feedback tab

 and the newly created user will be displayed

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- Assign the appropriate Feedback Template in the Login Details section ② (refer to the description under the Incident Tab)
- Restriction Details

 In this version, there is no Specific Restrictions section. The Site & Location Entry/Update or Reporting restrictions will be carried across from all other Registers. In addition, on the Feedback User Profile, the following restrictions can be included
 - Show Only "Alerted" Feedback in Inbox: This option should only be checked if the user has access to the Feedback Inbox (e.g. Risk/Quality Manager, Consumer Advocate) and should only see feedback they have been alerted to
 - Show Only "Alerted" Feedback in Reports: This option should only be checked if the user has access to the Feedback Reports (e.g. Consumer Advocate, Risk/Quality Manager, Executives, Managers) and can only report on feedback they have been alerted to
- 4. To save the user, press Save User ④

<u>Risk Tab</u>

In our scenario, users are **<u>not</u>** automatically activated under the Risk Tab.

- 1. Click on the Risk tab **0**
- A message will display at the top of the page specifying that the user you have created does not have a record in the Risk Register User profile i.e. they are not activated under this Register ②
- 3. If you would like this user to be an active Risk Register user, press the **Save User** ⁽⁶⁾ button



 Assign the appropriate Risk Template in the Login Details section (a) (refer to the description under the Incident Tab)

elect User: Terr User 20 Users found. Iser Name Filter:	×	User Prof	iles (Risk)	-		
20 Users found. Jser Name Filter:						
			User Regi	stry Sav	e User New User	Delete User
Saldian Hear Tune Filter			Rebuild 'Select U	ser' List Now		
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ogin Details						
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o you want to change Password:	Last Channel House					
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urrent/Pending Delegation						
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estriction Details	(All restrictions in this sectio	n are shared between a	I modules.)			
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pecific Restrictions 🧕	(Restrictions in this section a	are specific to the registr	er.)			
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Details						
						Hide Details Section:

- Restriction Details S: If the user does not have any Restriction Details then this section will be collapsed
 - To expose the **Restriction Details** section click on the section click on
 - If the user has restrictions this section will be exposed. If you make any changes to these restrictions, they will affect all Registers the user is active under (as these are the common restrictions)
- Specific Restrictions ⁽³⁾: This section will display the Register specific restrictions
 - Highlight the Entry/Update, Reporting and Journal Type Restrictions as required
 - Show Only "Alerted" Risk Items in Inbox: This option should <u>only</u> be checked if the user has the following Management Permission: Can Review Entries in Inbox (e.g. Risk/Quality Managers, Executives) and should only see Risks they have been alerted to
 - Show Only "Alerted" Risk Items in Reports: This option should only be checked if the user has access to the Risk Reports (e.g. Risk/Quality Managers, Executives, Managers) and can only report on risks they have been alerted to
 - If you restrict the list of reports, the user <u>WILL</u>
 <u>NOT</u> have access to the Risk Register Custom
 Report Builder on the Risk Reports page to create, modify or delete Custom Report Layouts
- 7. To save the user, press Save User 📀

How do I modify an existing user?

To modify an existing user, ensure you are on the Administration -> User Permissions -> User Profiles page

Modifications that can be done under any of the Register tabs where the user is active

- Modifying the user's Login Details: All the details under the Login Details section can be modified <u>except</u> for the Username. If you wish to modify the Username you will need to delete the User Profile and create a new one
- Creating or modifying a delegation for a user: This can be done under any Register tab where the user is active, provided you have the Administrative User Permission: Can modify other users Delegates under the General tab
- Modifying the Entry/Update and Reporting Restrictions under the Restriction Details section, as these are common across all Registers

Modifications that need to be done under the specific Register tab

- Changing the user's assigned template in the Login Details section
- Activating a user under a specific Register e.g. Risk or Quality Activity Registers
- Modifying the Entry/Update and Reporting Restrictions under the Specific Restrictions section as these are specific to a Register

It is <u>strongly recommended</u> that User Permissions and Field Settings are <u>not</u> modified under a specific User Profile, if the user is assigned to one of your main Templates e.g. Default, Manager, Executive, Risk Manager. This is because if any of these templates are modified and an "Apply Template Change" is done across RiskMan, the user's field settings and user permissions will be overwritten.

If the user is assigned a template where the users on this template have special needs that are dictated by their User Profile, then you can modify the user's individual field settings and user permissions. Ensure the template that these users are assigned to is <u>never modified</u>

Searching for a User



Under any of the Register or General tabs, locate the user

- 1. Select the user from the Select User **0** list or
- 2. Enter filter criteria in **one** of the filter fields **2**
 - Press "Rebuild 'Select User' List Now" 6
 - Select the user from the Select User **0** list

Modifications: Template Changes & Specific Restrictions

- 1. Click on the specific **Register** tab **0** and locate the user
- Modify the Template changes in the Login Details ② as required
 - This user's RiskMan User Type is: Select the template the user will be assigned to for the selected Register. This is used as a reference when templates are updated and changes are applied to all users on that template

Note: All other template specific restrictions will either need to be manually selected for that user, or will need to be applied through the **"Apply Template Changes"** option which will affect all users on that template - refer to the **RiskMan User Templates Guide**

- 3. Modify the Specific Restrictions ⁽²⁾ as required
- 4. Press Save User 4

	0				
General	Incident	Quality	Activity	Risk Feedba	:k
				-	
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		~]			
Login Details					
User Display Namei			This user	's position is:	V
User Name:			This user's RiskMan	User Type is: Default 2	V
				Reapply the above	e template permissions
Force Change Password					
Email Address			Alternate E	mail Address:	
Phone Numbers			H		
Profile Duration:				Start Pager Incident Entry	
Current/Pending Deleg	ation				
		Not A	Delegate	Date To Start	Date To End
No Restrictions in this area	a have any selected items.				۲
Specific Restrictions	2 (Restrictions in th	is section are specific to th	e resister.)		
Dia SR Vo Ra Dia Str	f" Incident items in Inbox. Incident Involved Restriction Incident Involved Restriction Alight/Clant alf Mambar Alabovar'sister openty unstal	M			
Reporting Restrictions					
Show only "Alerted	Incident Quality Activity Risk Feedback User Profiles Incident "www.res Incidents Incidents Incidents </th				
-					
Ch Ch	Uper Porfiles (Incident) in whether i				
Re	User Parfolies (Incident) International International <th></th>				
V0 Re	lative/Visitor				
	upment tervention	~			
	Restrict to these Reports:			Restrict to these Journal Types	
	MA TEST				
40	je Group Analysis je Group Analysis by Facility	^	Tas	-	^
	4 By Incident Involved 4 Data Export 4 Stuff			ion Taken Jala	
		<u> </u>	Invi	oice Paid	
	idrew's Layout ina test	Ť	Pre	ventative Recommendations spital Policy Amendment	×.
/who Was Affected?					
Lincident Involved	Entry Required		Antedical Record #	Entry Required	

Example: Modifying a User under the Incident Register User Profile

Modifications: Login Details & Restriction Details

- 1. Click on the specific **Register** tab **0** and locate the user
- 2. Modify the Login Details 2 as required
 - All fields in the Login Details section can be changed except for the Username. This cannot be changed because the username can be linked to Register Items
 - Template changes should be done under the respective Register or General tab - refer to the section <u>"Modifications: Template Changes &</u> <u>Specific Restrictions"</u>

Note: Advise that you <u>do not</u> modify the field settings or the user permissions as these are controlled by the User Templates and could potentially be overwritten if the templates are modified

- 3. Modify the **Restrictions Details (**) as required
- 4. Press Save User ④

General		0		
	Incident	Quality	/ Activity 📔 Ri	isk Feedback
		User Prof	iles (General)	0
elect Useri New User 34 Useri	v found.		User Registry	Save User New User Delete User
ser Nama Filteri			Rebuild 'Select User' List No	w
iskMan User Type Filter:		✓ C	Only Show Expired Users:	
ser Position Filter:		v C	Only Show Deleted Users:	
ser Created After Date:			Include Deleted/Expired Users in S	
ser Has Facility Restriction		v .	Exclude Deleted/Expired Users from	n searchi
igin Details				
ser Display Name:			This user's position	n kir
ser Names			This user's RiskMan User Type	
	ord: 🗌 Last Changed: Never			Reapply the above template permissions
s you want to change Passw issword Never Expires:	ord: Last Changed: Never		2	
rce Change Passwords			-	
mail Address:			Alternate Email Addr	essi
sone Numbers	[Nobile Num	
ofile Duration:	O Expires On		Start Pa	age: Incident Entry
	Never Expires			
		Not A Dele		
estriction Details		his section are shared between		
estriction Details Restrictions in this area have a ntry/Update Restrictions				Sent
estriction Details Restrictions in this area have a ntry/Update Restrictions	ny salacted items.		in all modules.)	tare -
Addition Details Restrictions in this area have a http://Update.Restrictions Caded Water Exception Longe Wattin Drivete	ny salacted items.		in all modules.)	han
estriction Details Restrictions in this area have a nerry/Update Restrictions Caded Neurophyse Coolsystex Lodge Wattin Drivete	actify Restriction	his section are shared betwee	Location Restrict	
estriction Details Restriction Restriction Cabell Human C	actify Restriction	his section are shared betwee	teration Restrict	
existing Results Indefinition in this area how a Indefinition in this area how a Indefinition of the area how a Analysis and a second and a seco	actify Restriction	to section are shared before	teration Restrict	
Cabel Hustington Acade Private Water Structure Water Structure Statistics of the Structure Cabel Hustington Cabel Hustington Cabel Hustington Cabel Hustington Cabel Hustington Cabel Hustington Cabel Hustington Hustin Hustington Hus	actify Restriction	Is settin are shared between	e di malalan) Lecation Restrict Elecation Restricten Elecation	Inne Earrice Rastelliters

Modifications: Adding or Modifying a Delegate

for a User

If a Manager is on annual leave or not available to perform their RiskMan duties for a period of time you can

- Check to see if the Manager has already assigned a delegate and if not assign a delegate on their behalf; or
- Modify a manager's delegation if the selected delegate becomes unavailable e.g. on sick leave

To assign a delegate

- 1. Locate the user under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Press the Add Delegate 2 button
- Search for the delegate using the Filter icon and then select the user from the Delegate list ⁽³⁾
- Enter the delegation period 4 (End Date should be the date the user is returning)

6. Press Save S

Select User: Havden	Anne (ahavden)	-	User Profil	es (Gener		Save User	lew User Delete User	
1 Users fond, User Name Filter: User Position Filter: User Position Filter: User Created After Date: User Has Campus* Restriction:		2 Manage Delega	tes Webpage Dialog			- Narris - Ne	ine decise	
		Manage Delegates for Hayden, Anne (ahayden) Add Delegate Edit or select a staff member as your Delegate Delegate Delegate Select Select Select Select Select Se						
Login Details		Start Date End Date	Tuesday, 22 May 201 Thursday, 31 May 20	- 4	 Image: A state Image: A state<td>Save 5</td><td></td><td></td>	Save 5		
Jser Display Name: Jser Name: Password: Email Address: Phone Numberi	Hayden, Ann Format as (L ahayden annegriskm	Delegate's Userna	me Delegat	a's Name There are no	1.000.000	pation start date	Delegation end date	
Profile Duration: Current/Pending Dele	© Expires (Never Ex							
Edit Delegation	t <u>y To</u>	http://sites.riskmar	.net.au/Vhims_PeterMac	Demo/ManageDelec	jates.aspx?	Local intranet Protec	ted Mode: Off	

To modify/delete an existing delegate

- 1. Locate the User under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Double click the **Delegate's Name** 2 in the list
- If you wish to modify the details of the delegate, make any respective changes and press Update 6
- 5. If you wish to delete the delegation press **Delete**

elect User: Hayden,	Anne (ahayden)	•	User Profiles	(General)	Save User	New User Delete User	_
		p [*] Manage Delegates - Webpage Dialog Manage Delegates for Hayden, Anne (ahayden)					
ser Display Namei	Hayden, Ant Format as (I	End Date	Thursday, 31 May 2012	*	Update	Delete	
ser Name: assword:	ahayden	Delegate's Usernar		Name	Delegation start date	Delegation end date	
mail Address: hone Number:	anne@riskm	The second s	2 Keone anna		22 May 2012	31 Nay 2012	
rofile Duration:	 Expires Never Expires 						
Current/Pending Dele	gation						

Modifications: Activate a User under a Register

Users can be active under some Registers e.g. Incidents & Feedback but not necessarily active in other Registers e.g. Risk and Quality Activity. This will depend on how your system is setup.

All users will be **active** under the **General & Feedback** tabs

If a user is not active under a Register, then they can be activated as follows:

1. Click on the specific Register tab 0 e.g. Risk

General Incident Quality Activi	ty Risk Feedback				
General Incluenc Quality Activi					
	User Prot	iles (Risk)			
Select User:		User Registry	Save User	New User	Delete User
1066 Users found.	1.00	Care requiry	3446 0 66	Hew Case	Desire Gree
llaar Nama Filter:	0.01.0	now Users with no permissions i		Rebuild 'Select Use	
		tow users with no permissions i	in this register:	Kebulid Select Use	LIVENOW
RiskMan User Type Filter:	•				
User Position Filter:	*				
User Created After Date:	🗇 Includ	users with no Permissions in S	learch:		
User Has Organisation* Restriction:	- Only of	iow active users in search:			

- 2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
 - Enter the user's first or last name in the User
 Name Filter Ø field
 - Check the "Only Show Users with no permissions in this register" S option
 - Press the Rebuild Select User List Now 4 button

General Incident C	uality Activity 🚺 R	isk Feedback				
		User Profiles	(Risk)			
Select Useri 4 Users found.			User Registry	Save User	New User	Delete User
Jser Name Filter:	david 💫	Only Show U	sers with no permission	his register:	Rebuild 'Select Use	r' List Now
iskMan User Type Filter:		•				•
ser Position Filter:		-				
ser Created After Date:		🔿 Include user	s with no Permissions in S	earch:		
Jser Has Organisation* Restriction:		- Only show a	ctive users in search:			

- 3. Select the user from the Select User S list
- 4. Press Save User 6
 - A message will display to inform you that the User is now activated

				·	
		User Pro	ofiles (Risk)	6	
Folect Upers Lauren Haupt (hau			User Registry Sav	a User New User D	elete User
29 User	I found.				
User Name Filter:			Rebuild 'Select User' List Now		
RiskMan User Type Filter:		¥ 0	Only Show Users with no permissions in	this register:	
User Position Filter:		×			
User Created After Date:		0	Include users with no Permissions in Sec	arch:	
Unor Has Facility Restriction:		v 🔹	Only show active users in search:		
Login Details					
User Display Name:	Lauren Haupt		This user's position is:	Emergency Department	5
User Name:	lhaupt		This user's RiskMan User Type is:	Superuser	2
				Reapply the above template per	missions
Do you want to change Passw					
Password Never Expires:	2				
Force Change Password:					
	lauran@cpl.com.au		Alternate Email Address:		
			Hobile Number:		
Phone Number:					
Phone Number:	C Expires On			Ny Home Page	
Phone Number:	 Expires On Never Expires 		Start Page:	Ny Home Page 18 Jul 2010 08:56:28	
Email Address: Phone Number: Profile Duration: Current/Pending Dolegation	())		Start Page:		
Phone Number: Profile Duration:	())		Start Page:		
Phone Number: Profile Duration: Current/Pending Delegation	Never Expires	I is acting a	Start Page:		• End

 If required, modify the User's Profile as appropriate e.g. Assign the appropriate template in the Login Details section and press Save User

How do I delete a user?

Users can ONLY be deleted from the General tab

If you delete a user from any of the Register tabs it will **only de-activate** them from that specific Register

If you wish to delete a user who no longer works for your organisation then prior to deleting the user the following should be checked

- Does the user have staff reporting to them or they report to a manager? Check under the Administration -> Manager Staff -> Staff Hierarchy page and edit under the Administration -> Manager Staff -> Edit Staff page. Remove all relationships for that user
- Does the user have an alert assigned to them? Check under the Administration -> Alert Management page.
 Either remove the user from the allocated user list for that alert and assign a replacement, or delete the alert

To de-activate a user from a Register

- Click on the specific **Register** tab e.g. Risk, Incident, Quality
- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields ③ and Press "Rebuild 'Select User' List Now" ④. Select the user from the Select User ② list
- 3. Press Delete User 6
- 4. A **message (**) will display to let you know that this user has been deleted from this Register only.

General Incid	ent Quality Activity	Risk Feedback	
Select User: Binns, Davi 13 Users fo	d (David Binns) 🛃 👻	User Profiles (Risk) es to user David Binns have been sav	ed. 5 Save User Delete User
User Name Filter: RiskMan User Type Filte Laer Position Filter: User Created After Dat User Has Organisation*	81	Only Show Users with no permissions in the v v w Tortude users with no permissions in Searc v Only show active users in pearch:	
Login Details User Display Name: User Name:	Binns, David Format as (Lastname, Firstname)	This use	ter's position is: Manager 🔹

General Incident Ou	uality Activity	isk Feed	dback	
General Incluent Qu	ancy Accivity R	USK Teet	IDACK	
		User	Profiles (Risk)	
The Uper Profile 'Day	id Binne' for re	nictor Die	k has been mar	ked as deleted (not physically deleted),
The oser Frome Day			restored if nece	
		ia can bei		boury.
Select Useri				
Select Useri 14 Users found.	•		User	Registry Save User New User Delete User
14 Users found.	• david	0		Registry Save User New User Delete User
14 Users found. Jser Name Filter:		c		
14 Users found. Jser Name Filter: UskMan User Type Filter:		c		
14 Users found.		c		permissions in this registerr Rebuild 'Select User' List Now

To delete a user from RiskMan

Deleting a user from RiskMan can only be done via the General tab

1. Click on the **General 1** tab

		User Profiles (General)	6
Binns, David (D 18 Users found		User Registry Save User New User	Delete User
User Name Filteri	David	Rebuild 'Select User' List Now	
RiskMan User Type Filter: User Position Filter:		Only Show Expired Users: Only Show Deleted Users:	
User Created After Date:		Include Deleted/Expired Users in Search:	
User Has Campus* Restrict	ion:	Exclude Deleted/Expired Users from search:	

- 2. Locate the user. Either
 - Select the user from the Select User 2 list; or
 - Enter filter criteria in one of the filter fields

 and
 Press "Rebuild 'Select User' List Now"

 Select the user from the Select User
- 3. Press Delete User 6

If the user has **not used RiskMan** they will be deleted from the database.

General Incid	lent Qualit	y Activity Risk	Feedback				
		L. L	lser Profiles (Ge	neral)			
			ile 'David Binns		eleted		
Select Useri		The User Pitt	ne David binns	User Registry	Save User	New User	Delete User
17 Users fou	nd.						
User Name Filteri	David				Rebuild 'Select Us	er' List Now	
RiskMan User Type Filter			Only Show Expired User				
User Position Filter:		-	Only Show Deleted User				
User Created After Date:			🔿 Include Deleted/Expired	Users in Search:			
User Has Campus* Restri	ctions	-	Exclude Deleted/Expires	Users from search:			

If the user <u>has used RiskMan</u> then their user profile will be flagged as deleted and can be restored if required.

General Incident	Quality Activity	Risk Feedback				
		User Profiles (Ge	eneral)			
	The Us	er Profile 'anne' has re	ecords in Ris	skMan.		
In order not to los	e the historical I	record, it has been ma	arked as dele	eted (not p	hysically de	eleted), and
		can be restored if n			Concession of the	
Select User:		can be restored in its	User Registry	Save User	New User	Delete User
17 Users found.	•		User Registry		New User	
17 Users found.			User Registry			
	Anne		User Registry	Rebuild 'Select I		
17 Users found.		Only Show Expired User				
17 Users found. User Name Filter:		Only Show Expired User Only Show Deleted User	51			
17 Users found. User Name Filter: RiskMan User Type Filter: User Position Filter:		Only Show Deleted User	51			
17 Users found. User Name Filter: RiskMan User Type Filter:	Anne		si Si d Users in Search:			

How do I restore a deleted user?

If a user was been deleted from RiskMan from the **General** tab and their User Profile was flagged as deleted, it will need to be restored under the **General** tab and then restored under each of the other Register tabs as required

To restore a user that was flagged as deleted from <u>RiskMan</u>

- 1. Click on the General **0** tab
- In the Filter Criteria section check "Only Show Deleted Users"
- 3. Press the Rebuild 'Select User' List Now ⁽³⁾ button
 - The Select User ④ list will now show all users who have been flagged as deleted. Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users



4. Press the Undelete User ⁶ button

General Incident Qu	ality Activity Risk Feedback	
	User Profiles (General)	6
elect User: anne (anne) • 1 Users found.		User Registry New User Undelete User
User Name Filteri		Rebuild 'Select User' List Now
RiskMan User Type Filter:	 Only Show Expired Users: 	
User Position Filter:	 Only Show Deleted Users: 	
User Created After Date:	① Include Deleted/Expired Users in Search	chu 🚽
	C Exclude Deleted/Expired Users from se	

- The User is now restored ⁶ under the General & Feedback tabs
 - If there are no changes to the user's profile, it will not be necessary to press the Save User button
 - If you wish to make changes to the user's profile, modify as required and press Save User
- Repeat steps 2 5 under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

	User Profiles (Gene GUser Undeleted.				
elect User: anne (anne) 🔻		User Registry	Save User	New User	Delete User
User Name Filters RiskMan User Type Filters User Position Filters User Created After Dates User Has Campus* Restrictions	Only Show Expired Usersi Only Show Deleted Usersi Only Show Deleted/Expired Use Only Show Deleted/Expired Use Only Show Deleted/Expired Use		Rebuild 'Select Us	er' List Now	
ogin Details					

To reactivate a user under a specific Register

- 1. Click on the specific **Register** tab e.g. Risk, Incident, Quality
- In the Filter Criteria section check the "Only Show Users with no permissions in this register" option
- 3. Press the Rebuild 'Select User' List Now button
 - The **Select User** list will now show all users who do not have permission to the selected Register
 - Select the user from this list

Note: It is optional to also include the other filter fields to locate the deleted users

- 4. Press the Undelete User button
- 5. The User is now activated under the selected Register
 - If there are no changes to the user's profile, it will not be necessary to press the Save User button
 - If you wish to make changes to the user's profile, modify as required and press Save User

Modifying the Field & Section Labels/Colours on a Register Form

The label of a **Field** or **Section Name** and the background

colour of a Section can be modified if the following icon 🚧 appears in front of the Label

Who Was Affected?	
6Incident Involved	Entry Required 👻
First Name	Entry Required 👻
Surname	Entry Required 👻

Example: Fields on the Incident Entry form

To be able to modify the label of a field or background colour of a section on a Register form

- The user requires the following Administrative Permission under the General tab: Can Modify Global Settings
- A user profile needs to be open in the respective Register
- 1. Click on the respective **Register 1** tab
- 2. Select any user from the Select User 2 list

General Incident Quality Acti	ivity Risk Feedback				
General Incident Quality Act		Second second second			
	User Profiles	s (Incident)			
Select Useri Haydon, Anno (ahaydon) 2	-	User Registry	Save User	New User	Delete User
User Name Filters	Only Sho	w Users with no permissions i	n this register: 🔗	ebuild 'Select User'	List Now
RiskMan User Type Filter:	*				
User Position Filter	•				
User Created After Date:	🔿 Include	users with no Permissions in S	earch:		
User Has Organisation* Restriction:	P. Outube	w active users in search:			

To modify a field label

1. Click on the 4 icon 1 next to the respective field

Summar	γÛ			Entry Required	
Details				Optional Entry	
Edit Field Det	ail				
Entry					_
Title 🔞	Details	8		0	×
Report					_
Title 🕜	Details	2			
	Display 🕜 🛛	Condition 👩	🖌 Group 🕜 [
Alert	15 a.				_
Title 🕜	Details	4			
	Display 🕜 🔓	Condition 🕜	~		
Advanced	1				_
Post Cell 🧑	<img alt="Che</td><td>ck Spelling" parent.fnsp<="" src="in</td><td>nages/spellcheck.gif</td><td>onclick=" td=""/> <td>2</td>	2			
Script 🕢	onfocus="pare	nt.fnPreSpellCheck	(this);"		~
	ld 🔞 [Obj Class 👩]
	TD Class 🕢		TR Class 🕢		1

- 2. Enter the label in the **New Title Text** ⁽²⁾ field (*this is the field on the respective Register form*)
- The new title should be reflective in the Reports and Alerts, so modify the New Reporting Title ⁽⁶⁾ and Alert Title ⁽²⁾ fields accordingly
- 4. If your Entry form has more than one label with the same name, ensure the labels for the Alert Title and Report Title are such that users are able to distinguish which Entry form label the field is referring to (refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)

						Hid	e Key Perso	onnel Sectio
Risk Owner Risk Coordinator Opened By Closed By	Dont Display Dont Display Optional Entry Dont Display		h		ssociated Inc ssociated Inc	idents		~
dit Field RRN	otifyLvI1OfAI	5						
Entry								
Title 🕜	Notify of Ass	ociated	Incident	S				×
Report								
Title 🕜	Notify Accou	intable E	Executive	e of Assoc	iated Incide	nt		
	Display 🧑	✓ C	ondition	0 🗸	Group 🔞	~		
Alert								
Title 🕜	Notify Accou	intable E	Executive	e of Assoc	iated Incide	nt		
	Display 🍘	C C	ondition	0 🗸				
Advanced -								
Post Cell 🗑								^
Script 🍘								200
	ld 🕜				Obj Class	0		
	TD Class 🕜				TR Class	0		
						AVE		CANCEL

Example: "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form

Entry						
Title 🕜	Notify of Asso	ciated Incidents				×
Report						
Title 🕜	Notify Accourt	table Executive of A	ssociate	ed Incident		
	Display 👩 🛛	Condition 🥥	v (Group 🔞	~	
Alert						
Title 🕜	Notify Accourt	table Executive of A	ssociate	ed Incident		
	Display 🕜 🛛	Condition 🕝	\checkmark			
Advanced-						
Post Cell 🔞						1
Script 🕢						0
	ld 🕜		Ot	j Class 🕜		
	TD Class 🕜		Т	R Class 🕜		

Example: "Notify of Associated Incidents" referring to the Responsible Manager on the Risk Entry form

 If a field label is determined by the Global Settings e.g. Site, Location, Program; the Title Text, Report Title and Alert Title will be displayed in a similar way to that in the example below of the "Site" field

	nployee Site	
Entry		
Title 🔞	*GS_ SiteName	
Report		
Title 🕜	*GS_ SiteName	
	Display 🔞 🖌 Condition 🍘 🖌 Group 🙆 🗸	
Alert		
Title 🕜	*GS_ SiteName	×
	Display 🍘 🖌 Condition 🍘 🖌	
Advanced		
Post Cell	2	^
-		~
Script 🕜		0
	ld 🔞 📃 Obj Class 🔞	
	TD Class 🔞 TR Class 🔞	Ĩ

 If you make a change to any of these labels, it will only affect the label on that Register Entry form and will <u>NO</u> <u>LONGER</u> obey the Global Settings label. An example where this may be useful

Global Settings = Site where Incident Occurred

This would be useful on the Incident Entry form but not on the Risk Register, Feedback Entry or Quality Activity form. You might want to call this field

- Site of Risk in the Risk Register
- Site on the Quality Activity form
- Site where Feedback is initiated in Feedback*
- 8. Press Save when complete

To modify a Section Title/Colour or Background Colour

1. Click on the *M* icon **0** next to the Section Title

A Dates 🚺		
Admission Date	Dont Display 🗸 🗸	
La Incident Date	Entry Required 👻	
ANotification Date	Dont Display 👻	
Date Closed	Dont Display 🗸	

 Modify the label in the Current Section Title I field (this is the field on the respective Register form)

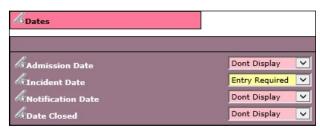
Note: If the title starts with *GS_ it means that the label is coming from the Naming Conventions in the Global Settings. If the label is changed it will not be affected by future Global Setting changes and will only affect that Register

Section -					
Title 👩	GS_Date:	sSectionName	2		×
	Fill 🔞 🔵	#997788	Text 👩 🤇	#FFFFFF	\supset
		6		4	
				SAVE	CANGEL

 To change the background colour and text colour of the section click on the respective Choose Background Colour
 or Choose Text Colour
 de buttons and a colour picker will display. Select your colour. If you want the colours to be the same as another section, copy the respective Colour code e.g. #997788 from one section to the other

Note: If you want Black text enter the colour code **#000000**. Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support https://hub.rldatix.com/SupportHUB/s/

4. Press Save when complete



Example: "Dates" section after changing the text and background colours

How can I view a summary listing of all the users in RiskMan?

The **"User Registry"** page provides you with a summary list of all registered users in your RiskMan. Depending on any Entry/Update restrictions you have in your User Profile, you will only be able to view users that match your restrictions

To access the User Registry page either

 Click on the User Registry button at the top of any of the User Profiles pages or select Administration -> User Permissions -> User Registry from the menu

Genera	Incident Ouality Ac	tivity Risk Feedback				
		User Profiles	(General)			
Select User:	Havden, Anne (ahavden)	-	User Registry	Save User	New User	Delete User
	1148 Users found.		(management) (c			
	Only displaying first 500 users 😵					
User Name I	Fåter:		R	Rebuild 'Select Us	er' List Now	
Disking they	er Type Filter:	- Only Show Expire	d Users:			
		- Only Show Delete	d Users:			
User Positio						
User Positio	n Filter: d After Date:	Include Deleted/	Expired Users in Search:			

The list of users you have permission to view (this could be all users or users matching your Entry/Update Restriction Details) will be listed. These users may be grouped by a column (depending on the last time you visited this page) or ungrouped

				ser Regis						
au Calences Messions	en Mone-Dasiel Date Speed S	an sand Douteston Contain		dan Trokes	Daitono					
	ton Deservition Parasition									
• Equal > 1)	dane									
ing a criums header here to	and in the over									
S	S. make Same	La codorren to .	13					Terrent .	1	Treeser
	2	17	2 0		10	1	17	6.10	12	
uoa.	Test Day	Meestodes	067	0.04	84	34		AL+ 2004		
2006	Elleng D	104		044	61	Set.		2412056		
zna Hayden	Anna flaydan		for forage	for theory	54	Sea		C031 64		
Iraknee 7	Traine 7	Acting Charge Muse		Reiner Couston		34		br 202		21 Mar 2012
takee 5	Traces 6	Acting Charge Russe	Reifer Diaxon	Nei %r Duaton	83	50		Jan 2012		02 Nov 2002
takee 8	AVS RADAVIOL	Acting Charge Burse	Retries Resident	Retriev lice or tion	WE	84		2412162		03 Nbg 2552
tainee 5	Trainee 0	Acting Draige Mater		Relinker Gaussian		63		13ar-3083		97.341.3862
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Display Option Definitions

- Show Columns: Uncheck the columns that you do not want displayed in your list. Some columns will always display and therefore will not be an option to hide
- **Display:** Select the type of users that you wish to display in your list ie. Deleted Users, Expired Users, Active Users
- Expand: Click this button if you wish to view all the users in your list if the list is collapsed. Alternatively if you only wish to expand a specific group of users, click on the button next to the collapsed group of users
- Collapse: Click this button if you wish to collapse an expanded list of users that have been grouped.
 Alternatively if you only wish to collapse a specific group of users click on the button next to the expanded group of users
- To export your list to Excel[™] click on the Export button

User List

The following is a list of options available in the User List

• Username link: If you click on the <u>username</u> it will direct you to the User profiles page. This is useful if you wish to make an alteration to a specific user profile e.g. correct an email address, delete (from the General tab) the user as they are no longer employed, change the user's template in one or more Registers

To then return to your **User Registry** page, click on the **User Registry** button at the top of any of the User Profile tabbed sections

Email Address Link: If you wish to send an email to a
particular user, click on the user's respective <u>email</u>
<u>address</u> link. An email will open with the email address
auto-populated ready for you to send an email

Suggested Groupings for your User Profile List

The list of users can be grouped by any of the column headings – *refer to examples below*

 Templates – Indicates the General or Register specific Template a user is assigned to.

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Example: Users grouped by their assigned General Template

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Example: Users grouped by their assigned Feedback Template.

Email Domain – Checks that users have entered the correct domain for their email address (the details after the "@" symbol e.g. @riskman.net.au) and highlights to you if users have entered an email address outside your organisations domain e.g. @hotmail.com or entered an incorrect domain for your organisation

	Email Domain	
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		٧
	Medibank	
	RiskMan User	
	Line Manager	
	Manager	
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Ξ	domain: @riskman.net	
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0	domain: @riskman.net.au	
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3. **Display Name** – Checks to see if a user has more than one logon in RiskMan



How do I assign staff to Managers?

Refer to the **RiskMan Manager/Staff Relationships Guide** accessible via the menu *Help -> Reference Guides*