# RLDATIX RISKMAN QUICK REFERENCE GUIDE USER MANAGEMENT (Network Logins)

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# Introduction

This reference guide is aimed at Managers or Administrators who will be responsible for managing the User Templates in RiskMan. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from *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

# CRLDatix RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES What are User Templates?

User Templates define the field settings, user permissions and in some cases restrictions a user will have access to in RiskMan. Each user will be assigned a user template in the Registers that they have permission to e.g. Incidents, Feedback, Risks or Quality Activities Users who self register in RiskMan will automatically be assigned the basic level template **"Default"** against the General and Register as well as any other Registers they are automatically granted permission to e.g. Incidents, Risk, and Quality Activities. In some organisations a user may only have permission to the Risk Register and/or Quality Activity Register once the Administrator has activated them under those specific User Profiles The templates created under any of the tabbed sections of the User Templates are unique to that Register; so a user can be assigned a different template in their Register specific User Profiles **Note:** The **"Default"** template cannot be renamed or removed from the Template list. This template is usually assigned at the staff entry level. If self registration is turned on in your RiskMan, any user who self

registers will be assigned the 'Default" template in the applicable Registers

## How do I create a new Template?

To create a new Template you will need to navigate to the *Administration -> User Permissions -> User Templates* page

👌 🕥 My Work	space   Man	agement   Administrati	on   Repo	orts   Help   <mark>Log O</mark>	ut	USER: S	y <mark>stem Manager (</mark> Manage
General	Incident	Quality Activity	Risk	Feedback			
		Use	er Temp	olates (Genera	al)		
Select Template:		▼ Note	: Users coun	ts include Feedback.	Save Template	New Template	Delete Template

The User Templates page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risks, Quality Activities; 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 Templates are used to assign User permissions that are common across all Registers and the Administrative Permissions. Individual Templates are created under each of the Register tabs and are independent of each other.

This means that

• If you create an **Accountable Executive** template under the **Risk** tab, this template name will not be available under any of the other Register tabs. If you want this template available under one or more of the other Registers you will need to create it under the respective Register

• If you create a **Line Manager** template under the **General** tab, it will not be available under any of the Register templates unless it is created under these

Each template will comprise some or all of the following sections

- **Template Identification** Name of the template; ability to base a template on an existing one; nominated start page (the page a user sees when they first logon to RiskMan)
- **Restriction Details** Entry/Update and Reporting Restrictions that are common throughout the Registers e.g. Region/Site & Campus/Location restrictions. Selection from this section will only be saved for templates under the General tab
- **Specific Restrictions** (<u>not available</u> under the **General** tab) Entry/Update and Reporting Restrictions that are specific to that register e.g. Journal Type Restrictions
- **Field Settings** (<u>not available</u> under the **General** tab) Specifies the status of a field e.g. Don't Display, Entry Required, Read Only, Optional Entry on a specific Register.
- User Permissions Specifies the users' permissions that are either common across all registers e.g. Administrative permissions (this is done under the **General** tab) or specific to a Register

## To create a Template

- 1. Click on the **Register 1** tab you want to create the template under e.g. **General**
- 2. Press the New Template 2 button

General Incident Risk Fee	dback		
	User Templates (General)	2	
Select Template: New Template	~	Save Template New Template	Delete Template
		Base this template on:	
mplate Identification			
nplate Name (User Type): Default	3	4 Start Page: Incide	nt Entry
you are editing an existing template, you canno	t change the name.		
	strictions in this section are shared between all modules.)		
Restrictions in this area have any selected items.			
try/Update Restrictions Facility Restriction:	Location Restriction:		
	71		
Cabell Huntington	÷.	<b>*</b>	
	Filter List		
porting Restrictions			
Facility Restriction:	Location Restriction:		
	*	*	
Cabell Huntington Acacia Private			
Eucalyptus Lodge test'test			
Wattle Private			
Begonia Day Surgery No one			
Riverside			
	•	¥	
	Filter List		
Aggregate Restriction:	Specialty Restriction:	Service Restric	tion:
Administrative Services Ambulatory & Community Services	Acute Aged Care Service Allergy, Immunology & Respiratory	Aged Care Services. Aged Psychiatry Services.	
carpark	Anaesthetics	Allied Health	
Finance Human Resources	BES Burns	Anatomical Pathology Biomedical Engineering	
Information Technology Services	Cardiology	Cardiovascular & Respiratory D	irectorate
Medical Services Nursing Services	Cardiothoracic surgery	Community and Ambulatory	
	Clinical Haematology	Emergency Medicine	

#### Example: Creating a template under the General Tab

- 3. Enter the name of your template in the **Template Name (User Type) 1** field
- If the template is to be based on an existing template, select the template from the Base this template on ④ list

The **Restriction Details** (only under the General tab), **Specific Restrictions** (where applicable), **User Permissions** and **Field Settings** (where applicable) of that template will be applied to your new template

If you are creating a template under the **Incident** or **General** tab, you will have the option to select the default **Start Page 4** the user will see when they first logon to RiskMan if they are

assigned to this template e.g. for Line Managers this might be the "Entered Incidents" page; for Executives this might be the "My Reports" page; for Risk Managers this might be the "Inbox" page

6. For all Registers except for the General tab, the Restriction Details I will not be saved with the template. If you apply these restrictions under the General Tab and that template is applied to a user in the User Profiles, that user will be restricted across <u>ALL</u> Registers. In most cases these restrictions will be applied at the User profile level. If you do want to include these restrictions in the General User Template the following describes the restrictions:

**Entry/Update Restrictions:** If the users on this template can only enter or update Register items based on Region/Site and/or Campus/Location restrictions, select accordingly. To select more than one item in a list hold your **CTRL** button and click on the list items

**Reporting Restrictions:** If the users on this template have access to running Register Reports based on Region/Site and/or Campus/Location restrictions, select accordingly. To select more than one item in a list hold your **CTRL** button and click on the list items

For Register Templates only, are there any Specific Restrictions 

 applied to the users on this template. If so highlight as required

All restriction Details 6	ions in this section are shared between all modules.)	
Restrictions in this area have any selected items.		6
try/Update Restrictions		
Facility Restriction:	Location Restriction:	
Cabell Huntington		
	Filter List	
porting Restrictions		
Facility Restriction:	Location Restriction:	
Cabell Huntington Acacia Private Eucalyptus Lodge test'test Wattle Private Begonia Day Surgery No one Riverside		*
Aggregate Restriction:	Filter List Specialty Restriction:	Service Restriction:
Administrative Services Ambulatory & Community Services carpark Finance	Acute Aged Care Service Allergy, Immunology & Respiratory Anaesthetics BES	Aged Care Services. Aged Psychiatry Services. Allied Health Anatomical Pathology
Human Resources Information Technology Services Medical Services Nursing Services	Burns Cardiology Cardiothoracic surgery Clinical Haematology	Biomedical Engineering Cardiovascular & Respiratory Directorate Community and Ambulatory Emergency Medicine
Psychiatry	<ul> <li>Colorectal and General Surgery</li> </ul>	<ul> <li>Engineering</li> </ul>

Example: Specific Restrictions for the Incident Templates

Specific Restrictions	(Restrictions in this section are specific to the register.)	Buik Actions Save Template	New remplate Delete remplat
Entry/Update Restrictions  Show only "Alerted" Quality items i Activity invo	n Inbox. 🧿 Jived Restriction:		
Quality Improvement Standards Compliance Audit / Survey Schedul Audit / Survey	er		
(Sub-report) Associate (Sub-report) Classificia (Sub-report) Evidence (Sub-report) Findings (Sub-report) Forum (Sub-report) Journals (Sub-report) Risk Actions - All		lask Further Action Internal Notification Correspondence Received Correspondence Sent Meeting Notes	

#### **Example:** Specific Restrictions for the **Quality Activity** Templates

Specific Restri	(Restrictions in this section are specific to the	register.)
Entry/Update	Restrictions "Alerted" Risk items in Inbox. ② Risk Level Restriction:	
	Enterprise Risk	L3
Reporting Res	Trictions "Alerted" Risk items in Reports. Risk Level Restriction:	
	Enterprise Risk Local Risk Project Risk	
	Restrict to these Reports:	Restrict to these Journal Types:
	(Sub-Report) Actions A4L (Sub-Report) Associated Incidents A4L (Sub-Report) Catalysts A4P (Sub-Report) Consequences A4L (Sub-Report) Consequences A4L (Sub-Report) Controls A4L (Sub-Report) Source of Assurance A4L Comprehensive Custom Report	General Comments Action Required Risk Review Control Review Discussion with Insurer

Example: Specific Restrictions for the Risk Register Templates

Specific Restrict	ions (Restrictions in this se	ction are specific to the register.)		
Entry/Update R	estrictions Alerted" Feedback items in Inbox. ② Type of feedback Restriction:			
	Complaint Compliment Suggestion	•		
Reporting Restr	Alerted" Feedback items in Reports. 😨 Type of feedback Restriction:	*		
	Complaint Compliment Suggestion	•		
	Restrict to these Reports:		Restrict to these Journal Types:	
	(Sub-Report) Actions (Sub-Report) Associated Risks (Sub-Report) Feedback Items (Sub-Report) Journal Actions (All) Actions (Completed) Actions (Not Achievable) Actions (Open) Actions (Overdue)	•	Action'required Correspondence File Notes	

**Example:** Restriction Details for the **Feedback** Templates.

#### For each Register

- Highlight the specific Entry/Update or Reporting field restrictions that relate to that Register Template
- Show Only "Alerted" <Register> In Inbox: This option should <u>only</u> be checked if the users on this template have access to the respective Register Inbox (e.g. Risk/Quality Managers, Consumer Advocates) and should only see the respective Register items they have been alerted to
- Show Only "Alerted" <Register> In Reports: This option should only be checked if the users on this template have access to the respective Register Reports (e.g. Risk/Quality Managers, Executives, Line Managers) and should only report on the Register items they have been alerted to

**Note:** Care should be taken when adding restrictions as they may be different for individual users on this template. These restrictions can be done via the User Profiles. However, if restrictions are included in a template, when applying templates in the User Profiles page, <u>ONLY</u> the respective "**Restrict to these Reports**" and "**Restrict to these Journal Types**" restrictions will be applied. To update the other restrictions for users on that template you will need to use Apply Template Changes. Refer to the section "**How do I apply changes to templates to all users on a template**"

- 8. For each Register template (not applicable to General), you will be required to specify which fields *i* a user assigned to that template is required to complete, based on their role within your organisation. Fields can have one of 4 statuses
  - Don't Display Not required in this template
  - Entry Required Mandatory for users on this template to enter/select data into this field
  - **Optional Entry** Optional for users on this template to enter/select data into this field
  - **Read Only** Visible for users on this template for information purposes only. The user will not be able to enter or edit data in this field

If all fields in a specific section are not required, click on the "Hide <section name> section" (3) check box

ÅAnonymous?	Entry Require 🗸		
Who is providing the feedback?	Dont Display Entry Required	AOrganisation name	Entry Require 💙
Client ID number	Optional Entry 너 Read Only	2	
<sup>40</sup> First name	Entry Require 💙	Asurname	Entry Require 💙
Date of birth	Optional Entry 💙		
RGender	Optional Entry 💙		
Gender - portal field	Dont Display 💙		

GIncident involved	Entry Require 💙	0	
Who is affected?	Optional Entry 🗸		
Client ID number	Entry Require 💙		
GType of worker	Entry Require 🗸		
GType of employment	Entry Require 👻		
APartner organisation	Entry Require 🗸		
Goccupation	Entry Require 💙		
GFirst name	Entry Require 💙	Linitials	Dont Display 💙
GSurname	Entry Require 💙		
GIs this client a minor?	Entry Require 💙		
GDate of birth	Optional Entry 🗸	LAge	Dont Display 💙
Gender	Entry Require 💙		

#### Example: Field Settings for an Incident Template

			Hide Person providing feedback Sec
Anonymous?	Entry Require 💙 🍞		
<sup>4</sup> Who is providing the feedback?	Entry Require 🖌	AOrganisation name	Entry Require 💙
Client ID number	Optional Entry 💙		
GFirst name	Entry Require 💙	Surname	Entry Require 💙
Date of birth	Optional Entry 🐱		
Gender	Optional Entry 🐱		
Gender - portal field	Dont Display 🗸		
Preferred mode of contact	Optional Entry 🗸		
Address	Optional Entry 🗸 😽		
Suburb / City	Optional Entry 💙		
State	Optional Entry 💙		

#### Example: Field Settings for a Quality Activity Template

A Details			Hide Details Section:
ARisk Name	Optional Entry 👻 👩		
Summary Description	Optional Entry 🗸		
Status			
ARisk Status	Optional Entry 💙		
Date Opened	Optional Entry 🐱	ANext Review Date	Optional Entry 🗸
GReminder Period	Optional Entry 💙	AReminder Date	
ADate Closed	Optional Entry		

#### Example: Field Settings for a Risk Register Template

			Hide Person providing feedback Section:
Anonymous?	Entry Require 💙 🍞		
${ m \AA}$ Who is providing the feedback?	Entry Require 💙	AOrganisation name	Entry Require 💙
Client ID number	Optional Entry 💙		
AFirst name	Entry Require 💙	ASurname	Entry Require 💙
BDate of birth	Optional Entry 🗸		
Gender	Optional Entry 💙		
Gender - portal field	Dont Display 💙		
GPreferred mode of contact	Optional Entry 🗸		
Address	Optional Entry 🗸 😽		
GSuburb / City	Optional Entry 🗸		
Astate	Optional Entry		

#### Example: Field Settings for a Feedback Template

 For the fields that involve sub-forms e.g. the Controls on the Risk Template; to set the field settings for the fields in these sub-forms, you will need to click on the respective "Edit RR Controls Permissions" button (refer to example below)

				Hide Co	ntrols Section:
Edit RRContro	ols Permissions		9		
iskman Page Webpage Dialog					
					Sav
2					-
Controls			ill be set is show to service a		Tdaatifa baarab
escribe the processes, policies ar				reduce this Risk.	Identify how th
escribe the processes, policies ar	Risk, and when it v			reduce this Risk.	Identify how th
escribe the processes, policies ar ontrol is expected to reduce this	Risk, and when it v Optional				•
escribe the processes, policies ar ontrol is expected to reduce this <b>Control</b>	Risk, and when it v Optional Optional		mented		
escribe the processes, policies ar ontrol is expected to reduce this <b>Control</b> <b>Control Hierarchy</b>	Risk, and when it v Optional Optional Optional		mented	Optional	
escribe the processes, policies ar ontrol is expected to reduce this Control Control Hierarchy Control Cost	Risk, and when it v Optional Optional Optional Optional	was initially imple • •	mented Effective Date	Optional	
escribe the processes, policies ar ontrol is expected to reduce this Control Control Hierarchy Control Cost Last Reviewed By	Risk, and when it v Optional Optional Optional Optional Optional	was initially imple • •	mented Effective Date	Optional	
escribe the processes, policies ar ontrol is expected to reduce this Control Control Hierarchy Control Cost Last Reviewed By Last Reviewed On	Risk, and when it v Optional Optional Optional Optional Optional	was initially imple	mented Effective Date	Optional Optional	Identify how th

10. For the Register Templates under the **User Permissions 9** section is a list of categorised permissions to RiskMan.

The User Permissions under the General tab are permissions that are either non-Register specific e.g. Administrative Permissions or permissions common across all registers e.g. can bookmark entries

The User Permissions under the individual register tabs will be Register specific

**Note:** A description of these permissions is available in the respective RiskMan User Permissions Description Guides.

#### ions

User	Permissions
	Basic Permissions
	Can "Bookmark" entries
	Can view Reminders
	Can use the "Contact Riskman" (developers) link on the Help menu
	Can edit own Line Managers
	Can bypass manager selection
	Can Not be the target of a Distribution List on item entry
	Can Not be selected as their Manager by a user
	Can see personal email log on menu
	<u>MyDetails</u>
	Can change own password.
	Can modify own sites (if enabled in Global Settings)
	Can change display name
	Can change contact number
	Can change mobile number
	Can change email address
	Can change alternate email address
	Can change own position

#### Example: User Permissions under the General tab



#### Example: User Permissions under the Incident tab

User	Permissions (9)	
	Basic Permissions	
	Can do Item entry	
	Can review own/subordinates entries	
	Can apply Distribution Lists (if enabled)	
	Can mark an entry for "Personal Alerts" (change notification)	
	Can see the Review History	
	Can "Archive" entries	
	Can prevent sending manager email notifications when saving an entry	
	Can use the "Print" report from an unposted entry	
	Can create Linked entries	G
	Can create Shortcut	
	Can create empty Shortcut	
	Can share Shortcut	
	Can create Draft	
	Can generate results using Letter Builder	

#### Example: User Permissions under the Quality Activity tab

	Basic Permissions		
	Can do Item entry		
	Can review own/subordinates entries	Ν	
	Can apply Distribution Lists (if enabled)	63	
	Can mark an entry for "Personal Alerts" (change notification)		
)	Can see the Review History		
)	Can "Archive" entries		
)	Can prevent sending manager email notifications when saving an entry		
	Can use the "Print" report from an unposted entry		
)	Can create Linked entries		
)	Can create Shortcut		
)	Can create empty Shortcut		
	Can share Shortcut		
)	Can create Draft		
٦	Can generate results using Letter Builder		

#### **Example**: User Permissions under the **Risk** tab

Can do Item entry         Can review own/subordinates entries         Can apply Distribution Lists (if enabled)         Can mark an entry for "Personal Alerts" (change notification)         Can see the Review History         Can "Archive" entries         Can prevent sending manager email notifications when saving an entry         Can use the "Print" report from an unposted entry         Can create Linked entries         Can See Risks on Items         Can Andrify Risks on Items         Can create shortcut         Can create empty Shortcut         Can share Shortcut		Basic Permissions
Can apply Distribution Lists (if enabled)         Can mark an entry for "Personal Alerts" (change notification)         Can see the Review History         Can "Archive" entries         Can prevent sending manager email notifications when saving an entry         Can use the "Print" report from an unposted entry         Can create Linked entries         Can See Risks on Items         Can create Shortcut         Can create empty Shortcut         Can share Shortcut		Can do Item entry
Can mark an entry for "Personal Alerts" (change notification)         Can see the Review History         Can "Archive" entries         Can prevent sending manager email notifications when saving an entry         Can use the "Print" report from an unposted entry         Can create Linked entries         Can See Risks on Items         Can create Shortcut         Can create empty Shortcut         Can share Shortcut	)	Can review own/subordinates entries
Can see the Review History Can "Archive" entries Can prevent sending manager email notifications when saving an entry Can use the "Print" report from an unposted entry Can create Linked entries Can create Linked entries Can See Risks on Items Can Modify Risks on Items Can create Shortcut Can create Shortcut Can create empty Shortcut Can share Shortcut		Can apply Distribution Lists (if enabled)
Can "Archive" entries         Can prevent sending manager email notifications when saving an entry         Can use the "Print" report from an unposted entry         Can create Linked entries         Can See Risks on Items         Can Modify Risks on Items         Can create Shortcut         Can create empty Shortcut         Can share Shortcut	J	Can mark an entry for "Personal Alerts" (change notification)
Can prevent sending manager email notifications when saving an entry Can use the "Print" report from an unposted entry Can create Linked entries Can See Risks on Items Can Modify Risks on Items Can create Shortcut Can create empty Shortcut Can share Shortcut	1	Can see the Review History
Can use the "Print" report from an unposted entry Can create Linked entries Can See Risks on Items Can Modify Risks on Items Can create Shortcut Can create empty Shortcut Can share Shortcut	)	Can "Archive" entries
Can create Linked entries Can See Risks on Items Can Modify Risks on Items Can create Shortcut Can create empty Shortcut Can share Shortcut		Can prevent sending manager email notifications when saving an entry
Can See Risks on Items Can Modify Risks on Items Can create Shortcut Can create empty Shortcut Can share Shortcut		Can use the "Print" report from an unposted entry
Can Modify Risks on Items Can create Shortcut Can create empty Shortcut Can share Shortcut		Can create Linked entries
Can create Shortcut Can create empty Shortcut Can share Shortcut		Can See Risks on Items
Can create empty Shortcut Can share Shortcut		Can Modify Risks on Items
Can share Shortcut	1	Can create Shortcut
	1	Can create empty Shortcut
Can create Draft		Can share Shortcut
		Can create Draft

Example: User Permissions under the Feedback tab

11. To save the template, press **Save Template** 

To modify an existing template select Administration -> User Permissions -> User Templates page

- 1. Select the **Register tab 0** you wish to modify
- 2. Select the template from the Select Template 2 list
- 3. Modify the template as required
- 4. Press Save Template 8

**Note:** If you make a change to a template it will not automatically update all users on that template. To update all users on a template refer to the **"How do I apply changes to templates to all users on that template?"** section

	Base this template on:           Start Page:         New Incident	•		User Templates (Genera	I) 🚯		
plate Identification plate Name (User Type): Default	Start Page: New Incident	Select Template:	Default (155 users)	~	Save Template	New Template	Delete Template
Jate Name (User Type): Default     Start Page: New Incident       pu are editing an existing template, you cannot change the name.     Start Page: New Incident	shared between all modules.)				Base this ten	nplate on:	
survey     Start Page:     New Incident	shared between all modules.)	plate Identification					
All restrictions in this section are shared between all modules.)  All restrictions in this section are shared between all modules.)  All restrictions in this area have any selected items.	shared between all modules.)					Start Dage: New	Incident
strictions in this area have any selected items.  y/Update Restrictions Region Restriction:  ommunity ommunity orporate itegrated		a are colong an exis	ting template, you cannot change	the name.			
	Location Restriction:	riction Details					
y/Update Restrictions Region Restriction: Location Restriction:	Location Restriction:		(All restrictions in t	his section are shared between all modules.)			
Region Restriction:     Location Restriction:       ionmmunity orporate integrated     ionmmunity	Location Restriction:		(All restrictions in t	his section are shared between all modules.)			
Region Restriction:     Location Restriction:       community     Image: Comporate antegrated	Location Restriction:		S	his section are shared between all modules.)			
orporate ntegrated		strictions in this area have	any selected items.	his section are shared between all modules.)			
orporate ntegrated		estrictions in this area have	any selected items.				
ntegrated		strictions in this area have	any selected items.				
		estrictions in this area have <u>y/Update Restriction:</u> Region Community	any selected items.		^		
		strictions in this area have y/Update Restriction: Region ommunity orporate	any selected items.		^		
		strictions in this area have y/Update Restriction: Region ommunity orporate itegrated	any selected items.		^		
		estrictions in this area have <u>ry/Update Restriction</u> : <b>Region</b> Community Corporate ntegrated	any selected items.		^		

# How do I apply changes to templates to all users on that template?

Note: Available in September (2012) SR 11 or above

To apply the changes you have made to templates, navigate to the Administration -> User

Permissions -> Apply Template Changes page

- 1. Select the **Register 0** the template was modified under
- 2. Check the templates 2 that you wish to update

Note: If the template does not exist in the list it means that there are no users assigned to that template

- 3. Check mark the sections 3 of the template that you modified
- Press the respective Apply the Template Changes 4 or Reset 4 button (depending on the Register page you have displayed)
  - All users on that template will be updated
- 5. Repeat steps 2-4 if you wish to apply different template changes to another template under the same Register
- 6. Repeat steps 1-4 if you wish to apply template changes under another Register

be undone. You may make these changes as often as r to this page should be restricted to RiskMan Administri	er type. Please note that any individual settings for items required. All changes are specific to the selected Register ators only.
to this page should be restricted to RiskMan Administri	ators only.
red across all registers.)	
Location Restriction:	
Location Restriction:	
Physical location Restriction:	Program Restriction:
settings:	
template page where you give permission to allow peop	
	ion can be dangerous to your setup. Modifying restrictions use difficulty administering RiskMan.NET, and would re- e type selected above) adopt those settings from the te red across all registers.) Location Restriction: Location Restriction: Physical location Restriction:

**Example:** Apply Template Changes page for General

B

<b>O Apply Complete Changes (Risk)</b> The propose of this page is to allow you to copy settings for a specific user template to ALL users of that user type. Please note that any individual settings for items you select to complete the selected Register. Access to the selected Register. (a) I any individual settings for a specific user template to ALL users of that user type. Please note that any individual settings for items you select to complete the selected Register. (a) I default (17 Users) (a) I default (17 Users) (b) I default (17 Users) (c) I d	eneral	Incident	Quality Activity	Risk	Feedback	
Iost, and the changes cannot be undone. You may make these changes as often as required. All changes are specific to the selected Register.         Access to this page should be restricted to RiskMan Administrators only.         User         Administrator (5 Users)         © Obfault (17 Users)         © Obfault (10 Users)         Total users: 25         Rest individual restriction settings:         PLASE BE CARFUL. Selecting settings from this section can be dangerous to your setup. Modifying restrictions on Site specific users may allow privacy breaches. Adding restriction         Administrators may cause difficulty administering NisMtan.NET, and would require developer correction.         Selecting the settings below will make all users (of the type selected above) adopt those settings from the template.         Specific Restrictions       (Restrictions in this section are specific to the register.)         Entry/Update Restrictions       (Restrictions in this section are specific to the register.)         Entry/Update Restrictions       (Restrictions)         Show only "Alerted" Nisk items in Inbox: @       (Restrict to these Reports:				• Арр	ly Templa	te Changes (Risk)
User Type:       Administrator (3 Users)         CLO (1 Users)       Orfank (17 Users)         Defauk (17 Users)       O         O HIS Template with posting (1 Users)       Total users: 23         Reset all individual field settings:       (PLASS BE CARPUL, Selecting settings from this section can be dangerous to your setup. Modifying restrictions on Site specific users may allow privacy breaches. Adding restriction         Statusers: 23       Reset all individual field settings:         PLASS BE CARPUL, Selecting settings from this section can be dangerous to your setup. Modifying restrictions on Site specific users may allow privacy breaches. Adding restriction         Statusers: 25       Reset all individual field settings:         Image: 2000 content of the set of the type selected above) adopt those settings from the template.         Specific Restrictions       (Restrictions in this section are specific to the register.)         Entry/Update Restrictions       (Restrictions in Inbox: O         Show only "Alerted" Risk items in Inbox: O       (Restriction:         Reset all individual field settings:       Downal Type Restrictions         Reset all individual field settings:       This means all the fields on the template form where you can say "Don't Display", "Handatory" etc.	, and the change	es cannot be un	done. You may make thes	e changes as of	emplate to ALL use ften as required. A	ers of that user type. Please note that any individual settings for items you select to copy will be Il changes are specific to the selected Register.
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This means all the tick boxes at the bottom of the template page where you give permission to allow people to do things.				data data data data data data data data		ter an ellemente de de altrese
4		i the tick boxes	at the bottom of the temp	place page wher	e you give permis	son to anow people to do thilligs.
Apply the template changes.		late changes	i			

Example: Apply Template Changes page for Risk

Gen	neral Incident Qu	ality Activity	Risk	Feedback
	0		Apply	Template Changes (Incident)
The pur lost, an	rpose of this page is to allow you to conduct the changes cannot be undone. Yo	opy settings for a sp u may make these o	ecific user te hanges as of	emplate to ALL users of that user type. Please note that any individual settings for items you select to copy will be ften as required. All changes are specific to the selected Register.
Access	to this page should be restricted to F	RiskMan Administrat	ors only.	
User	Administrator (5 Users)			
Type:	CLO (1 Users)			
	Code Blue (1 Users)			
	Default (4400 Users)			
	Distribution (230 Users)			
	Line Manager (358 Users)	-		
	Manager (1 Users)	2		
	OHS Template with posting (1)	lisers)		
	Other Manager (87 Users)			
	Risk Manager (2 Users)			
	SuperUser (16 Users)			
		-		
	Total users: 5102 ndividual restriction settings:			
Spec	cific Restrictions (Restr	ictions in this sectio	n are specific	to the register.)
Entry	v/Update Restrictions			
III e	how only "Alerted" Incident items in	Inhor:		
and a particular	ncident item Involved Restriction:	Indox.		
	incident item involved Restriction:			
Repo	ort Restrictions			
s	I C RESCILCIONS			
1000		Reports:		
	Show only "Alerted" Incident items in	Reports: 🗿		
Name of	show only "Alerted" Incident items in incident item Involved Restriction:	Reports: <b>ව</b>		
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	ihow only "Alerted" Incident items in incident item Involved Restriction: Restrict to these Reports: nal Type Restrictions Restrict to these Journal Types: Teset all individual field settings: his means all the fields on the templa Reset all individual permission setting	tte form where you		

#### Example: Apply Template Changes page for Incidents

		and the chang	es cannot be undon	e. You may ma	uplate to ALL users of that user type. Please note that any individual settings for items y we these changes as often as required. All changes are specific to the selected Register.
	Default (33 Users) Executive (5 Users Manager (112 User Portal (1 Users) Quality & Safety M SuperUser (18 Use	;) rs) anagers (3 Us	0	age should be	restricted to RiskMan Administrators only.
Reset individ	l users: 172 Select All dual restriction set Restrictions' reset		) 2		
	l individual field se	ttings:	form where you car	n say "Don't Di	splay", "Mandatory" etc.
Reset all	ans all the fields on	i the template			

#### **Example:** Apply Template Changes page for Feedback

# CRLDatix RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES How do I delete a template?

User Templates can be deleted from the User Templates page provided there are no active, expired or deleted users assigned to that template. If a user is assigned to a template that is to be deleted, it will be necessary to

- 1. Locate the user in the respective User Profiles Register
- 2. Assign them to another template
- 3. If the user assigned to the template that is to be deleted is a deleted user, it will be necessary to
  - Undelete the user
  - Reassign a different template e.g. "Default" (as this template can never be deleted)
  - Save the user
  - Delete the user again

Note: For more information on how to modify or delete a User Profile, refer to the respective RiskMan User Management Guide (Network Logins) or RiskMan User Management Guide (Non-Network Logins)

## Deleting a Template

To delete a template you will need to navigate to the Administration -> User Permissions -> User

Templates page

- 1. Select the respective **Register 0** page
- Select the template you wish to delete from the Select Template <sup>2</sup> list the number of users assigned to that template will display in the list

0	User Temp	lates (Gene	eral)		
Select Template:		×2	Save Template	New Template	Delete Template
	CD Default (155 users) Default+ (2 users) Default++ (1 users) Default+++ (1 users) DEMOtemplate (2 users) Executive (9 users) Manager (105 users) Portal Quality & Safety Managers (4 users) Superuser (5 users)				

If there are no users assigned to the template, press Delete Template 8

	Us	er Temp <mark>l</mark> ates (Gene	eral)		8
Select Template:	Manager (105 users)	~	Save Template	New Template	Delete Template

Ceneral Incident Qu	uality Feedback Risk				
	User Te	emplates (General)			
	The template	'TEST' has been de	eleted.		
Select Template:		~	Save Template	New Template	Delete Template

**Note:** The template <u>will only</u> be removed from the respective Register.

3. If you delete a template with assigned users, a list of users assigned to that template will display and the template will not be deleted

		U	lser Templ	lates (General)	1		ß
Select Template:	Manager (105 u	isers)		~	Save Template	New Template	Delete Template
					Base this tem	plate on:	/
eneral Incider	nt Quality	Feedback	Risk		/		
		U	Jser Temp	lates (General)			, it
		U	Jser Temp e 'MANAGI	lates (General) ER', because it users are:		assigned to	o it.
	ble to dele	U	Jser Temp e 'MANAGI These Delegate)	ER', because it	has users a	Amy Keys (Amy.K a Trounson (Barba	ieys )

## **Bulk Actions**

In the Templates users can be moved from one template to another in bulk. There are two functions available to move users. The **Move** function and the **Import** function.

Note: Bulk Actions are not available in the General register.

## The Move function

The Move function will move ALL users from the current template to any other template in the **same** Register.

- 1. Select the Register 0
- 2. Click on the <sup>2</sup> Bulk Actions button
- 3. Choose **8** Move in the Select an Action here drop down list

		User Temp	lates	(Incident)	2		
Select Template:	Manager (96 users)		~	Bulk Actions	Save Template	New Template	Delete Template
			-		Base this ten	nplate on:	
emplate Identification							
emplate Name (User Type):	Manager	Incident Register Ten	plate:Ma	nager 🛛		Start	Page: Review My Incid
s you are editing an existing	template, you ca	Select an action here 🗸					ager terten rijnt mete
estriction Details		Apply Cancel					
Restrictions in this area have any	selected items.						
pecific Restrictions	(8						
ntry/Update Restrictions						_	
Show only "Alerted" Inci	dent items in Tak						
	ncident Involved						
Client Partner Org							
Worker	anisation					<b>*</b>	

4. Select the **4** Template that you want to move the users to

Move	Register Template:Manager	
all users on this	template to the	
Executive	✓ template. 4.	
The second second second	the second second second second second second second second	
Warning: This funct There is no way to r	ion effectively merges the two templates. reverse this,	



cutive 👝	
6	
	<b>•</b>

6. There will be a confimation message to confirm the number of users that were moved **NOTE:** The Move action is not reversable.

## The Import function

The Import function will move ALL users from ANY template in ANY Register into the chosen template in the Register you select.

- Select the Register 0
- **2.** Click on the **2** Bulk Actions button
- 3. Choose **8** Import in the Select an Action here drop down list

		User Templates	(Incident)	2		
Select Template:	Manager (96 users)	•	Bulk Actions	Save Template	New Templa	ate Delete Template
				Base this ten	nplate on:	,
Cemplate Identification						
emplate Name (User Type Is you are editing an exist		Incident Register Template:Ma	inager		Sta	art Page: Review My Incider
Restriction Details		Apply Cancel				
to Restrictions in this area have	any selected items.					(3
Specific Restrictions	(P					
Entry/Update Restrictions	1					
Show only "Alerted"	Incident items in Inb Incident Involved				н.	
Client Partner	Organisation					

- 4. Select the **4** Register that you want to Import the users from
- 5. Select the **•**Template in the previously selected register that you want import users from



### 6. Click the **O** Apply button

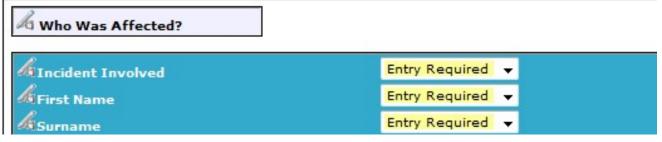
7. There will be a ② confimation message to confirm the number of users that were moved **NOTE:** It is important to carefully consider the users that you are Moving or Importing. The action will be irreversible and if you need to reverse the Move or Import it will be a manual process where you assign EACH user a template permission one at a time.

Import	✓ all users from Register	
General V	nplate Manager 🗸 🕤	
	access to this register on this template.	
And Post I Reason with the other	dready have an account in this register will not	
be affected.		

# 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 A appears in front of the Label



#### 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

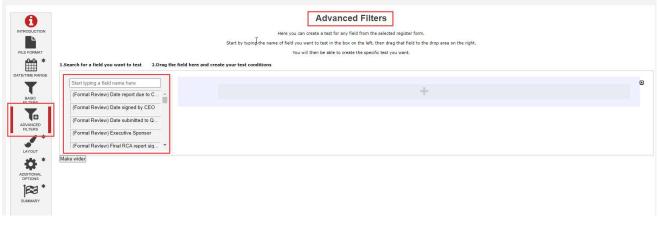
#### To modify a field label

- 1. Ensure you have a template selected under the respective Register
- Click on the icon next to the respective field, which displays the Edit Field Detail panel:
- 3. Enter the label in the **New Title Text** <sup>(2)</sup> field (*this is the label that will be used on the data entry form*)
- The **Report** title **3** determines what should be displayed when this field is utilised in Reports. The options below the label text include:
  - a. **Display:** Allows this field to be utilised in Reports

de Details	5		Optional Entry	$\mathbf{\mathbf{v}}$
lit Field Detail	1			
Entry Title 🕜	Details 2			×
Report Title 🕜	Detaile 3			
Alert Title 🕝	Display 🕢 💽	Condition 🕝	Group 🕢	
	Display 🕜 🛛	Condition 🕜	$\checkmark$	
Advanced Post Cell 🕜		Spelling" src="imag fnSpellCheck(docun	es/spellcheck.gif" nent.getElementByld('Detail	));">
			nerate Post Cell from: Cho	ose Template 🗸
Script 🕜	onfocus="paren	it.fnPreSpellCheck(th	nis);"	0
	Id 🔞		Class 🕢	1

Note: The image above demonstrates the field this function relates to in the Customise Layout page

b. Condition: Allows this field to be chosen in Advanced Conditions for filtering purposes



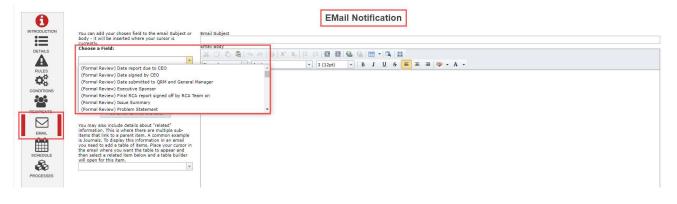
Note: The image above demonstrates the field this function relates to in the Reports page

c. **Group:** Allows this field to be chosen as a **Grouping** field when creating a **Custom Report Layout**. Note that free text fields should **not** be enabled for grouping

Groups	Group Fields	۲
Detail	(Formal Review) Executive Sponsor	
	(Formal Review) Issue Summary	
1 2	(Formal Review) Problem Statement	
	(Formal Review) Review Conclusions	
	(Formal Review) Review Notes	
Sub-Reports	(Formal Review) Review Reference	1
	(Formal Review) Review Status	
1.	(Formal Review) Review Team	
	(Formal Review) Review Title	
	Age	
	Age Group	
	Are Modified / Alternative Duties Required?	
	Are you reporting the incident on behalf of another person?	
	Body Part	
	Cause of injury	
	Client ID Number	*

Note: The image above demonstrates the field this function relates to in the Customise Layout page

- 5. The **Alert** title **4** determines what should be displayed when using this field in Alerts. The options below the label text include:
  - a. **Display:** Allows this field to be utilised in the email section of your Alerts page as highlighted below



b. Condition: Allows this field to be used when creating Alert filter criteria as shown below

-		n order for the alert to trigger. You can add as many conditions as necessar	у.	
	The 'Test Conditions' button will tell you how many e	xisting records there are which match the conditions you have added.	C3	
LS Please enter a Descriptive name for these condition	Eg. Staff manual handling injuries; Risks with overdue status, etc			
The focus of this alert is Just Incidents		Select to add a related filter for	*	Test Condi
Start typing a field name here				
(Formal Review) Date report due to C		+		
(Formal Review) Date signed by CEO				
(Formal Review) Date submitted to Q				
ULE (Formal Review) Executive Sponsor				

**Note**: The properties in the **Advanced** section <u>should not be modified</u> except without the explicit guidance of RiskMan International

6. 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*)

			Hide	e Key Personnel Section:
Risk Owner	Optional		anothy of Associated Incluents	
Opened By Closed By	Optional		Reported To	Optional Entry V
Edit Field RRN	otifyLvI10fAI			:
Entry Title 🕜	Notify of As	sociated	Incidents	
Report Title @	Notify Accou	untable E	xecutive of Associated Incident	
	Display 🕜	-	Condition 🕢 🔽 Group 🧭	<b>v</b>
Alert				
Title 🕜	Notify Accou	untable E	xecutive of Associated Incident	
	Display 🕜	~	Condition 🕜 🗸	

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



**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

dit Field Si	te	3
Entry Title 🕜	*GS_SiteName	
Report		
Title 🕜	*GS_SiteName	
	Display 🝘 🔽 Condition 🔞 🖌 Group 🔞 🔤	2
Alert		
Title 🕜	*GS_SiteName	
	Display 🕢 🗸 Condition 🔞 🗸	

 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 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\*
- 9. Press Save when complete

# To modify a Section Title/Colour or Background Colour

1. Click on the  $\overline{\mathcal{A}}$  icon  $\mathbf{0}$  next to the Section Title

Incident involved	Entry Require 💌								
Who is affected?	Edit S	Edit Section 75							
Client ID number Type of worker	e 🔞 Who Reported the Incident? 2								
GType of employment		Fill 🕜	#ff2925	Text 🕢	#ffffff				
Partner organisation		Ð		4					
Occupation					SAVE	CANCEL			
GFirst nave								Dont Display	~

2. Modify the label in the **Current Section Title 2** 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

To change the background colour and text colour of the section click on the respective colour box (a) & (a), and a colour picker will display. Click your mouse to select your desired colour.

**Note:** At present, you cannot type the HEX code manually in order to designate an exact colour. Please contact RiskMan Support if you require a specific colour or colours to be used. Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support - <u>https://hub.rldatix.com/SupportHUB/s/</u>

4. Press Save when complete

MWho Reported the Incident?			
Reporter's name	Entry Require 💙	& Reporter's position	Entry Require 👻
A Contact phone	Optional Entry 💙		
Are you reporting the incident on behalf of another person?	Entry Require	Who are you entering this incident on behalf of?	Entry Require 💙

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