Introduction

This reference guide is aimed at RiskMan Administrators who will be responsible for maintaining your RiskMan system configuration and also to use some of the System Tools that are available in RiskMan. The descriptions and locations of each of the Global Settings can be located in the **Global Settings Descriptions Guide** accessible from the *Help -> Reference Guides*

What do the System Configurations entail?

The System Configurations affect the overall operation of RiskMan. These settings include

- 1. **Global Settings** settings for all aspects of RiskMan (except Feedback). Some of these settings include
 - Colour Schemes
 - Naming Conventions for the Global fields used within the Registers
 - Default settings for the way fields appear e.g. Yes/No fields are displayed as radio buttons, lists or checkboxes; Date/time fields are drop down fields or free text; Organisation name which will appear on reports
 - Register Report output defaults e.g. PDF, Word™
 - Scheduling for your email notifications and alerts
 - Mail setup for your emails
 - Setup to link network logins to RiskMan (LDAP)
 - Register specific settings
- 2. Feedback Global Settings settings that are specific to the Feedback Register

Note: These settings will be incorporated into the Global Settings in a future release

- 3. Text editing tool for the front-page text
- 4. Licensing Details
- 5. Grid Defaults for Register Listing pages
- 6. Columns to display in the **Find Related Incidents** list for linking incidents to Feedback notifications
- 7. LDAP testing
- 8. Email Log
- 9. Attach Document Settings

What user permissions do I need to access the System Configurations?

For a user to have permission to the Configuration Modules including the Global Settings, they will need the following **Administrative Permission** under the **General** tab

• Can modify Global Settings

How do I access the Configuration modules?

1. From the menu select Administration -> Configuration



Global Settings

To access the Global Settings for all aspects of RiskMan <u>except</u> Feedback, select from the menu Administration -> Configuration -> Global Settings

1	Wy Workspace * Management * Administration * Reports * Help * Log Out					
	Global Settings					
1	Expand All Collegee All Double Click a row to Expand, Collagee or Edit. Double Click when editing cancets the edit. Changes are immediate.					
	Label 2 Value					
>	Administration					
>	Alerts					
>	Colour Schames					
>	Documents					
>	Item Entry Defaults					
>	Licensing					
>	Mad					
>	Nanagement Structure					
>	Naming Conventions					
>	Register Item Lists					
>	Registers					
>	Reports					
2	Schaduled Jobs					
2	Scheduler Service					
2	Security					
2	System Values					
>	Users					

These settings are grouped under logical headings. Some settings will be Register specific e.g. Quality, Risk Register, Incidents, Feedback and will appear in the **Registers** grouping.

Some general settings can also appear under a Register specific setting. If this is the case, the Register setting will take priority for that Register. For example, the **40) Enable Link (Multi-Person) entries** setting can be setup as a Register specific setting if Linked Items is only to be active for the Incident & Risk Registers but not for any other Register

 To view specific settings under a Grouping click on the respective Expand ">" icon 2. To view settings under all Groupings click on the **Expand All** button

Global Settings		
Expand All Collapse All Double Click a row to Expand, Collapse or Edit. Double Click when editing cancels the edit. Change		
Label	+	Value
Administration		
10) The name of your Organisation.		BMI Healthcare - Development
20) How many minutes before Session Timeout?		45
30) Default number of days shown in Audit Log.	Edit	
40) Allow users to display the 'Item explorer'.	Edit	
50) Contact Help' Label.		BMI Healthcare Help
60) Contact Help' Email Address.	Edit	
70) Contact Help' Email Address is Region Specific.	Edit	
80) What title to place in the title bar of the browser?	Edit	BMI Healthcare - Developmen
90) First month in financial year.	Edit	July
Alerts		
10) Manager/Staff item permissions will be handled by Alerts.	Edit	Yes
20) Apply User Restrictions when creating Alerts.	Edit	No
30) When generating Alerts (Vsn 2), use Alternate Email Address if available.	Edit	No
Colour Schemes		
10) Which colour to use for system highlights?	Edit	B4C6D9
15) Which text colour to use for system highlights?	Edit	000000
20) Which colour to use for Mandatory fields?	Edit	FFFFCC
25) Which icon rollover colour to use (e.g. Inbox)?	Edit	B4C6D9
30) Which colour scheme to use for the navigation buttons in the Control Panel of saved records?	Edit	XpBlue
40) Which colour theme to apply to the page containing the Main Nenu.	Edit	Office2010Silver
50) Which colour theme to apply generally	Edit	Office2010Blue
60) Repeated background Image URL to use in the greyed out section when timed out?	Edit	images/RMdevice.png

Example: Sample of the Global Settings

3. The Settings specific to a Register e.g. Quality, Risk Register, Incidents, will appear under the **Registers** grouping

Indem Indem Velocity > Advanced -				
> Abs/s > Gob/s Abs/s > Gob/s Abs/s > Bos/s Abs/s > Bos/s Abs/s > Bos/s Abs/s > Bos/s Abs/s > Math/s				
> Odder Schwatz > Dozensti				
> Docentity > Name Subly Docenties > Usersing > Marcing Conservation Structure > Marcing Conservation Structure > Marcing Conservation Structure > Marcing Conservation Structure > Instruct Conservation Structure > Instructure				
i.e. All constant				
> Ucensig Medi > Mangement Structure				
> Muli > Munipursue Statuture > Numipursue Statuture				
Normality Registration A Registration Registration Image: Internet and Image: Internet and Image:				
> Registres > Registres * > Facilitation * > Redictation * > Backets * > Backets *				
✓ [mainta] 3 Feedback 3 Explored to the second secon				
Fedback Fedback Modents Auk				
> Incidents > Rak				
> Risk				
> Reports				
Scheduled Jobs				
> Scheduler Service				
> Security				
System Values				

Example: Register specific settings

Can I search for a Setting?

- 1. Press the Expand All button to expand the settings
- 2. Press **CTRL F** to display the **Find 1** field in your Internet Explorer
- 3. Enter your search word and RiskMan will highlight the settings that contain that word **2**

Fin	d: journal Previous Next 📝 Options 🔻 13 matches		
_			
	Demo Site		
2	S My Workspace * Management * Administration * Reports * Help * Log Out		
v	Form Options		
	10) Select the display option for Yes/No questions on item entry forms.	Edit	Dropdown List
	20) Mandatory setting for Date Of Birth field applies to Items involving a Client only.	Edit	Yes
	30) Date entry fields display option.	Edit	Free form entry field
	40) Username display style.	Edit	User Display Name (User Name
	50) How many items to show in a multi-select lists?	Edit	10
٣	Item Version Management		
	10) Create an Unposted copy of the record when it is posted or reposted.	Edit	Yes
	20) Description to appear above the "Post" and "Update the Posted Record" buttons on the form for the above function.	Edit	A copy of the updated form will
	30) Make the above action the default.	Edit	Yes
	40) "Can review own/subordinates entries" edit mode when "Allow item entry" is DFF	Edit	Allow Edits even if "Allow item
~	Journals		
L	10) Enable Journal Entry.	Edit	Yes
L	20) Make the "Journal Type" field on journals to be mandatory.	Edit	No
L	30) CC Journal Creator when Journal Alert Reminder is sent.	Edit	Yes
L	40) When a Journal is actioned, it is mandatory to enter the "Task Outcome" and "Task Completed Date" fields.	Edit	No
L	50) Allow users to change Date and Time Stamp on Journals	Edit	Yes
_	10) Allow users to modify forms, maintaining all versions.	Edit	Yes
	20) Allow users to add Notes to existing forms,	5.63	No

Example: Using the Find field to search for Global Settings that contains the word "Journal"

How do I modify a Setting?

- 1. Locate the setting by expanding the list
- 2. Double click the setting
 - A description of this setting will also be displayed

1	My Workspace * Management * Administration * Reports * H	elp - L	ag Out				
	Global Setti	nas					
Expa	Expand All Colleges All Double Click a row to Expand, Collapse or Edit. Double Click when editing cancels the edit. Changes are immediate.						
Label # Value							
> Ad	Laboration * Variation						
> Ale	erts						
> Co	lour Schemes						
> Do	cuments						
✓ Ite	em Entry Defaults						
*	Distribution Lists						
	10) Enable Distribution lists.	Edit	Yes				
	20) Make Distribution list sequential.	Edit	No				
	30) Send EMail notification to users on a distribution list.	Edit	Yes				
	40) Send only one EMail notification to each use FYes: No Wy decide, loss testion, an outState will may be sent and to a growth one and the first sent of the sent of the sent outstate was no the claims and more users to the list and you enter additional comments to be included in i emaily will be sent an email notification unless the next setting, "20) Do not sen emailed. Users Users Users Constructions Construc	istribution ition list it r the Distribu	list if additional personnel are added after the corresponding means the users have not viewed the notification as yet. If you tion List email, then ALL users (even those already sent an				
	50) Do not send Distribution List email again, even if email comments are entered.	Edit	Yes				
	60) Email notes for Distribution List emails display in Review History using this policy.	Edit	Always display.				
>	Form Options						
>	Item Version Management						
>	Journals						

- 3. Modify the setting as required e.g. select Yes/No; select an item from a list
- 4. Press the **Update** button if you wish to save your modification, otherwise press **Cancel**

How do I create a Register Specific Global Setting?

Some of the Global Settings affect all Registers E.g. *Enable Link (Multi-Person) entries* and some settings are specific to only one Register E.g. *Risk Register Risk Matrix display style* which is located under the **Register | Risk Register** Global settings list and only relevant to the Risk Register

However, if you would like a Global Setting to also be Register specific because you would like a different state of that setting in a particular Register, you can make a Register Specific Version

- 1. To create a register specific setting, double click the setting
- 2. Press the Make Register Specific Version 0 button

· ·	orm Options				
	10) Select the display option for Yes/No questions on item entry forms.	Edit Dropdown List			
	20) Mandatory setting for Date Of Birth field applies to Items involving a Client only.				
	eyes No It is likely that this setting will only apply to the Incident register. It is configurate the setting will only apply to the Incident register. It is configurate the setting will only apply to the Incident register.	ured as a generic setting to provide a default for all registers. 🛛 🔞			
	Update Cancel	Make Register Specific Version			

- 3. In the pop-up window
 - Select the Register 2 to add this setting to
 - Modify the Help ⁶ text if required
 - Press Save or Discard 4

Add Register Specific Version		
🛇 🕴 🚯 🛛 Add a	egister Specific Global Setting	
lease Note: Not all settings can be made Registe	even offer the option), and some may not yet be suitably configured in code. It will not hurt to try.	
egister to add setting for:	· ·	
lobal Setting Name:	Event	
elp Text	Feedback 🔗	
🔏 🗇 🛅 🛅 🔍 🗢 🕪 🗴 x,	Risk 🕊 🖛 🗸 🔛	
Normal	v (Font Size) v B J U S ≡ Ξ ≡ 💯 v A v	
Design HTML Prev		

- The setting will appear under the specific Register Name under the *Register* grouping.
- 5. Locate the new setting under the specific Register folder and modify as required
- 6. RiskMan will use the Register specific setting rather than the Global Setting

RiskMan Text Editor

This option allows you to configure the front-page text.

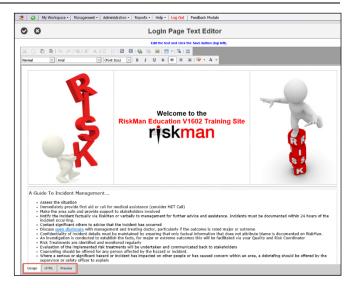
- 1. To access this page, select Administration -> Configuration -> RiskMan Text Editor
- Press the Edit button next to the Edit the Login Page Text option

	gement Administration Reports Help Log Out USER: System Manager (Manager)				
RiskMan Text Editor					
Edit Edit the Login Page Text.					
Edit the "Incident Saved" Acknowledgement Message.					

Note: The Acknowledgement page that can appear after an incident is submitted and before you get to the Confirmation page is normally turned off. If you wish to know more about this page refer to the **RiskMan System Configuration & Tools Description** *Guide*

- 3. The **Design** mode allows you to edit the text on the front page
- The HTML mode allows you to apply more advanced styles for your front page as well as incorporating logos and pictures. Knowledge of HTML is required
- 5. Modify the text and layout as required and press the





Note: If you want to be able to edit text on other pages within RiskMan e.g. The Create New Login page refer to **Text Editor Tool** under the **Administration -> Tools** menu

Setting the Default Grid Layouts for Register Listing Pages

This setting allows you to set the default grid layouts of your Register listing pages e.g. Incident Inbox, Entered Incidents, Posted Incidents, Entered Activities, Entered Risks etc

Note: This option is <u>not</u> available for Feedback Listing pages in this version

The grid layout consists of the columns that are displayed on each of the listing pages and also the column widths

When an Administrator, the person who has the Administrative permission: Can modify Global Settings, configures all the listing pages under their login, they can set all other user's listing pages to match - provided the user has never made changes to these listings

- Under the Administrator's login, configure the columns and column widths for all the Register specific listing pages
- 2. From the menu, select Administration -> Configuration -> Inbox Default Columns

🧶 🥥 My Workspace Management Administration Reports Help Log Out	USER: System Manager (Manager)				
Set Inbox Grid Column Defaults					
This tota is a ward to set the Default lysup for all of the direl langu pages, such as Datas. Entered Items, Posted Items and other vestions of these the electric closures, proprings, closure with an of electric closures, for sample, but not Bitrar applied to the grid as these are cleared when you log out. Please note that each values, as grider to minimum. For sample, but not Bitrar applied to the grid as these are cleared when you log out. Please note that each values, as griders are located within a set of the total bar. This is a set of the total bar and the set of the set of the total bar and the set of	t and then log back in will become part of				
Once you are happy with your layouts, you can return here and Click the button below. This will take your settings and make them into defaults for new users. Users that have already configured their settings will not be affected. When a user accesses the Grid Listing pages for the first time, they will be presented with the grid in the format you have layed out.					
If these defaults have never been set up, then the user will start with a pre-defined set of columns.					
Registerer Conductor Activity					
Save the Grid Defaults 2					
Incident default last updated en 7 Oct 2000 12:40 Ry System Hanager (Hanager) Rick default last updated en 14 Ney 2012 16:12 ky (Net Specified)					

3. Highlight the Registers **1** that you wish to update - (you can highlight more than one by holding your CTRL key and clicking on the respective Registers in the list)

- 4. Press Save the Grid Defaults 2
- Only listing pages that a user has not modified i.e. changed the columns and/or column widths, will have their respective listing pages updated

Adding or Updating your RiskMan Licence

All organisations hosting their own RiskMan will require a Licence Key. The licence key will be dependent on your RiskMan licence agreement with RiskMan International Pty Ltd. Each licence key will have an expiry date and once the licence key is expired or about to expire, a new licence key will need to be obtained. An expired licence will result in the inability to create users in the User Profiles – all other aspects of RiskMan will still be functional. Once you have applied for a licence, a licence key will be forwarded to you in a file which will need to be uploaded into RiskMan via the Licensing page

To access the Licensing Page

- 1. From the menu, select Administration -> Configuration -> Licensing
- 2. To obtain a licence, you will need to contact support who will send a licence key <u>noreply.SupportHUB@rldarix.com</u>
 - When the licence key is forwarded to you, save it locally

There are two ways to upload your new licence details.

Either upload the licence key file sent from support or copy and paste the contents from that same file **1**

atabase Server N	lame:		Database Name: R	iskManHQ	
Your current Lice	nce details.				
Licence GUID		6111dbd4-ab8	8-4a92-a5bf-af21		
SiteID		10000			
Site Name		RiskManHQ			
mplementation T	/De	Live			
Comment	ype	RiskManHQ			
		RISKMAIIHQ			
Licence keys.					
Sequence	Key		Friendly Name	Expiry Date	Value
1	Register:All_Register	ərs	All Registers	31 Dec 2019	100
o update your Lie					
You may upload the	e file from a local drive:			Brow	//\$8
					~
Or paste the Licence	e text here:				~
Upload your Licence	details				

LDAP Testing

If your IT Department has configured RiskMan to use organisational Network Login accounts, there are 3 LDAP Configuration options that you can use to

- Search for a user to see if they have a network account
- Test that the LDAP configuration is working from RiskMan to your Network accounts

• Import User Profiles on your Network into RiskMan

Note: Prior versions required Users to contact RiskMan Support to obtain an authentication code in order to be able to conduct LDAP testing. This requirement has now been removed. LDAP Login testing no longer requires an authentication code.

To test searching for a user on your network to ensure the LDAP configuration has been setup correctly.

1. From the menu select Administration -> Configuration -> LDAP Test User Search

Find Network Users Webpage Dialog		— X
Find a Network User		
	Search	Cancel
There are no Rems to show in this view For security and performance reasons, searches are limited to 50 results.		

2. Enter your search criteria and press Search

Note: The way you search for users will depend on how your IT Dept has setup the search string. Not all search strings are the same. An * acts like a wildcard e.g. Anne* will search for all users whose name starts with "Anne"

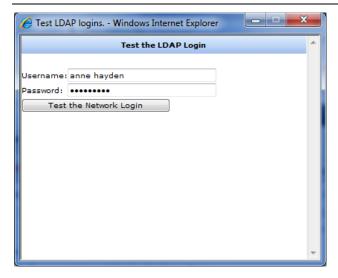
🔗 Find Network Users - Windows Internet Explorer					
Find a Network User					
anne*		Search Cancel			
User	Display Name	Mail			
Anne Hayden	Anne Hayden	anne@riskman.net.au			
٠ [III				

To test the connection between RiskMan and your Network logins

1. From the menu select Administration -> Configuration -> LDAP Test Login

Test the LDAP Login	🥭 Test LDAP logins Webpage Dialog	
Password:		Test the LDAP Login
i est the Network Login		

2. Enter your Network Username and Password



- 3. Press Test the Network Login button
 - A message will appear if you are successful or not. If you are not successful you may need to consult your IT Department or RiskMan Support -<u>noreply.SupportHUB@rldarix.com</u>

C Test LDAP logins Windows Internet Explorer	
Test the LDAP Login 4	~
Username: anne hayden Password: Test the Network Login Authenticated successfully to the Network account. Related RiskMan Account: Found	

Email Log

All emails that are sent from RiskMan are logged into the database. The Email Log page allows Administrators to review the email logs to ascertain if emails are being sent or not. This is useful

- If you are investigating why users may not be receiving email notifications i.e. incorrect email address; mail server has changed and is not updated in your Global Settings; emails have stopped being sent from RiskMan
- Tracking emails that have been sent to a particular user

To access the Email Log

- 1. From the menu select Administration -> Configuration -> Email Log
 - By default a list of unsent emails will be displayed

Drag a column header here EmailID Date Added 22/05/201	Expand Al	Mark as Sen Colapse AI that column e Sent	et 😥 Export				
Change Columns III	Expand Al to group by t Dat	hat column	Export				
Drag a column header here EmailID Date Added 42 22/05/201	to group by t	hat column	Export				
EmailID Date Added	Dat						
EmailID Date Added	Dat						
42 22/05/201	• •		Recipient Addresses	Subject	Last Error	Trys	Last Send Attempt
			2			2	
	2		anna.leone@petermac.	Riskman Delegate Notification		0	
41 15/05/201	2		tennille.lewin@peterma	Alert 67 from RiskMan: High Risk Radiation Therapy Incident Notification		0	
40 15/05/201	2		jim.cramb@petermac.c	Alert 66 from RiskMan: High Risk Incident Notification		0	
39 15/05/201	2			RiskMan Alert Error		0	
38 15/05/201	2			RiskMan Alert Error		0	
37 15/05/201	2			RiskMan Alert Error		0	
36 15/05/201	2			RiskMan Alert Error		0	
35 15/05/201	2			RiskMan Alert Error		0	
34 15/05/201	2			RiskMan Alert Error		0	
33 15/05/201	2			RiskMan Alert Error		0	
32 15/05/201	2			RiskMan Alert Error		0	
31 15/05/201	2			RiskMan Alert Error		0	
30 15/05/201	2			RiskMan Alert Error		0	
29 15/05/201	2			RiskMan Alert Error		0	
28 15/05/201	2			RiskMan Alert Error		0	
Page 1 of 3 (39 items) < [1]	2 3 >						

- 2. If you want to view all emails that have been sent
 - Uncheck "Unsent Only" 1
 - Modify the Date Range ② (when the email was logged to be sent)
 - Filter the type of emails that you wish to preview from the Reason Sent ⁽³⁾ field e.g. Alerts, Distribution Lists
 - Press Refresh 4

Insent Only 🗐 👩	5 B	ate 23/04/2012	2	I Log	Reason Sent C	B	- Refr				
Mark as sent	From L	Mark as Sent		5/05/2012	reason sent	Antennewsion Line	- Rein				
Change Columns	Able Cliek aver to view the final. Orange Columns Expand Al Collapse Al Expert age a column header here to group by that column										
EmailID	Date Added	Date Sent	Recipient Addresses	Subject	Last Error	Trys	Last Send Attempt				
4	- 7		\$	2	<	2					
81567	11/05/2012	11/05/2012	anne@riskman.net.au	RISKMAN.NET Item Review Request		0					
	3/05/2012	3/05/2012	Sanjay@riskman.net.au	RISKMAN.NET Item Review Request		0					
80991			acotte@riskman.net.au	RISKMAN.NET Item Review Request		0					
80991 80954	3/05/2012	3/05/2012		Review Request							
80954	3/05/2012 27/04/2012	3/05/2012	vishal@riskman.net.au	Review Request RISKMAN.NET Item Review Request		0					

Example: This list shows all the Distribution List emails that have been sent in the last month

- 3. To open an email click on the Email ID link in the list
 - If the email address of the person who is to receive the email is incorrect, change the email address in the Recipient Addresses and/or CC Recipient Addresses field 1
 - If the Date Sent 2 field is not empty, clear the content of this field
 - Other changes can be made to the email, e.g. email subject, email body ⁶
 - Press Save Changes ④ at the bottom of the email
 - The email will be re-sent when the next email scheduling cycle begins on your RiskMan

	Email Editor	
lease note: Under the c	current Email sending scheme the SMTP server used will be picked up from the global setting, so changes here would have no effect.	
Date Added	22 May 2012 12:06	
Date Sent	2	-
Recipient Names	leone anna	1
Recipient Addresses	anna.leone@petermac.org	1
	s anne@riskman.net.au	1
Subject HTML Body	Riskman Delegate Notification	
	X O 略 聞う (*19) x' x 1 注 目目 画 @ @ ■ V	
6	Design 14754. Preview	
Body	leone anna (Leone Anna),	
	Hayden, Anne (ahayden) has granted you access to use their RiskMan account, to take affect from 22 May 2012 to 31 May 2012.	
	To assume the Identity of Hayden. Anne (ahayden), log into RiskMan using your own username and password, and from the meru, select My Workpace - Ny Identity and click on the blanchy links of relayden. Anne (ahayden). You will then be switched to the Hayden. Anne (ahayden) account and be able to take on their RiskMan permissions and responsibilities.	
Username	Manager	4
Reply To Address	daranee@riskman.net.au	
SMTP Server		
Sender Name		
Sender Address	daranee@riskman.net.au	
ient Reason	Riskman Delegate Notification	1
ource		
ource ID	0	_
rror Count		
ast Error	•	
Error on Last Try	4	1
Close	Save Changes	
Note: If you update	Sive Charges The email in any way, a comment will be added to the body indicating that you have done so. Editing a Password email will d ii. This is intentional and for security.	les

- 4. If you want to search for emails sent to a user
 - Ensure you have Unsent Email

 unchecked so you are displaying the Sent Email
 - Enter the date range 2 when the emails were sent
 - Ensure Reason Sent = All Items 😣
 - Filter the **Recipient Addresses** ④ field by entering the first part of the user's email address (*as in the example below*). The system will automatically filter once you have entered your filter criteria

Jnsent Only 🔲 🚺	From Date	23/04/2012	Emai	il Log	Reason Sent	{All Items}
Mark as sent		 Mark as Sent 	0			
Change Columns	Expand All	Collapse All	Export			
Drag a column hea	der here to group by	that column				
	der here to group by Date Added	that column	Recipient Addresses	Subject	Last Error	Trys
			Recipient Addresses	Subject		Trys
EmailID	Date Added	Date Sent				
EmailID	Date Added	Date Sent	sanj 👍 💡	Begins with		
EmailID	Date Added	Date Sent • • • 3/05/2012 • •	sanj 4 ♀ Sanjay⊕riskman.net	Begins with Contains		

Attach Document Settings

To be able to attach a document to a notification/activity/ item you need to ensure you have specified the Attach Document Settings. These are accessible under the *Administration -> Attach Document Settings* page

🃚 💟 My V	Vorkspa	ce Management	Administration Reports He	elp Log Out	USER: System Manager (Manager			
Attach Document Settings								
1. Documents U	pload Typ	e (Security Type) - <mark>N</mark> e	te : This is a one time setting and cannot	be changed in future.				
Ø Database	(High)	 RiskMan Databas Other Database Different Server 	0					
🔵 File Syster	n (Low)							
2. Temporary Pa	ath							
3. Max Documer	nt Size (M	B)	1 3					
			Ū					
Save Upload Se	ttings	4						

Specify where the document files will be stored Database (high security option) or File System (low security option). If you select

- **RiskMan Database:** The files will be stored in the RiskMan Database *This is the recommend option*
- Other Database: Files are stored in another sequel database but on the same server as the RiskMan database. If this option is selected enter the name of the database
- Different Server: Files are stored in another sequel database but on a different server to that of the RiskMan database. If this option is selected please contact RiskMan Support -<u>noreply.SupportHUB@rldarix.com</u>
- **File System:** Files are stored in folders in a central location. If this option is selected, enter the path of where the files will be stored.

Note: It is recommended that this be a folder on the RiskMan Web Server but not inside any Web Sites as the files could be exposed through the website

Temporary Path: All files uploaded or downloaded in an Internet environment must be saved to a temporary file location before being saved to the destination location. For this reason it is necessary to enter the path e.g. c:\Temp where these files will be stored temporarily - this path can be changed at any time

• Max Document Size (MB): Specify the maximum size of the documents that can be attached to a notification/item/ activity - this file size can be changed at any time

(): To save your settings, press Save Upload Settings

System Tools

The **Tools** options available under the *Administration -> Tools* menu provides other system related functions which can either be

Accessible to your RiskMan Administrator; or

 Accessible via an authentication code provided by RiskMan Support and possibly only used by or in conjunction with RiskMan support

The Tools menu option is only available to users with the following **Administrative Permission** under the **General** tab

• Can modify Global Settings

As some Tools can only be used in conjunction with RiskMan Support; the contact details are noreply.SupportHUB@rldarix.com or +61 3 9686 0009

List Structure Editor

This option provides access to the Administration Lists that are normally hidden under the List & Codes Maintenance list.

This page is only accessible via an authentication code.

It allows RiskMan Support to make changes to your System's setup that are not accessible to RiskMan clients but are used in conjunction with requests from clients; for example:

- Audit Log Settings: Defines the logging of specified events in the RiskMan system. The logging of Assign and Unassign Manager is often enabled at customer sites
- LDAP Multiple sites: Defines multiple LDAP servers if required in an alliance, and when enabled users must select the server/domain they wish to use
- My Home Page Items: Defines all of the items which can be displayed on the Home Page
- Auto Post Incident Rules: Defines the conditions under which incidents should be automatically posted
- Auto Post Feedback Rules: Defines the conditions under which feedback should be automatically posted

Note: If you wish to know more about the Admin lists please contact RiskMan Support - noreply.SupportHUB@rldarix.com

Menu Editor

This option provides access to the RiskMan menus e.g. My Workspace, Management, Administration, Reports, Help

This page is only accessible via an authentication code

It allows RiskMan Support to modify, move or include additional menu items in your RiskMan e.g. Menu items that might point to your own user documentation

Data Tool

This option allows scripts to be run against your database and also to extract data from your database.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support

Script Tool

This option allows extraction of data from specified tables in your database e.g. template information; datasets; lists; front page text.

This page is only accessible via an authentication code

It is usually used by, or in conjunction with RiskMan Support to extract specific data from your RiskMan database that may need to be updated into our respective RiskMan model site when enhancements have been requested; or copy data from your Training/Live database to your Live/Training database

Audit Log

The Audit Log allows you to view changes that have been made to specific parts of your RiskMan e.g. Assign a Manager, Unassign a Manager; Login Failed; Login Success; Account update to LDAP; Changes to labels on the Register Entry Forms and other events.

Auditing can be turned on or off with the assistance of RiskMan Support

Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of Audit Log entries* to set automatic purging once each respective record type reaches a certain age.

Example: List of items that are audited in RiskMan

To filter your Audit List

- Modify the date range (refer to the RiskMan List Page Configuration Guide)
- Select a specific Action from the list

2 0		space • Manager	nent • Administrati	on * Reports * Help * Log Out Feedback Module					
				Audit Log	\$	1			
Drag a column beader here to group by that column									
Date		User 💌	Action	Action Description					
	- 🕈	2							
21 Apr 201	7 14:18	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsername' from '0' to '1'		_			
21 Apr 201	7 14:21	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsername' from '1' to '1'					
21 Apr 201	7 14:25	Manager	Global Setting edit	Change Global Setting 'InfoCentre_Max/WigdetGroup' from '10' to '4'					
21 Apr 201	7 14:44	Lauren Manager	Incident Default	Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted					
21 Apr 201	7 14:44	Lauren Manager	Risk Default Widg	Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted					
21 Apr 201	7 14:51	Lauren	Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdet' from '6' to '6'					
21 Apr 201	7 15:11	Lauren	Global Setting edit	Change Global Setting 'DontDisplayReldsInReportsMask' from '********** to 'Do Not Have Permission To View'					
21 Apr 201	7 15:16	Lauren	Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from 'Do Not Have Permission To View' to 'cocococcoc'					
21 Apr 201	7 15:52	Lauren	Global Setting edit	Change Global Setting 'ReasonForLinking' from '0' to '1'					
21 Apr 201	7 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefixSuffix' from 'None' to 'Prefix'					
21 Apr 201	7 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from " to '*'					
21 Apr 201	7 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from '*' to '*'					
24 Apr 201	7 11:26	Manager	Item Form Loaded	Form loaded, Register=Incidents(Incident), Display ID=3573					
24 Apr 201	7 11:41	Manager	Item Form Loaded	Form loaded, Register=Incidents(Incident), Display ID=3599					

Press enter to update the list

My W	orkspace • Manager	nent - Administrati	on - Reports - Help - Log Out Feedback Module	SER: System Manager	(Man				
			Audit Log	٥	2				
Drag a column header here to group by that column									
Date [User 💌	Action 💌	Action Description						
21 Apr 2017 😳 🔹	♥								
21 Apr 2017 14:18	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFooterUsername' from '0' to '1'		_				
21 Apr 2017 14:21	Manager	Global Setting edit	Change Global Setting 'ShowCompCustReportFosterUsername' from '1' to '1'						
21 Apr 2017 14:25	Manager	Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdetGroup' from '10' to '4'						
21 Apr 2017 14:44	Lauren Manager	Incident Default	Infocentre: Incidents Default Widgets, Group and Datasourced installed and permission granted						
21 Apr 2017 14:44	Lauren Manager	Risk Default Widg	Infocentre: Risk Default Widgets, Group and Datasourced installed and permission granted						
21 Apr 2017 14:51	Lauren	Global Setting edit	Change Global Setting 'InfoCentre_MaxWigdet' from '6' to '6'						
21 Apr 2017 15:11	Lauren	Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from '********* to 'Do Not Have Permission To View'						
21 Apr 2017 15:16	Lauren	Global Setting edit	Change Global Setting 'DontDisplayFieldsInReportsMask' from 'Do Not Have Permission To View' to 'xxxxxxxxxxxx						
21 Apr 2017 15:52	Lauren	Global Setting edit	Change Global Setting 'ReasonForLinking' from '0' to '1'						
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefixSuffix' from 'None' to 'Prefix'						
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from " to 's'						
21 Apr 2017 16:00	Lauren	Global Setting edit	Change Global Setting 'TitleMandatoryPrefix' from "" to ""						

Example: List of all events for a specific date

Find User Tool

This tool allows you to locate all users who have a set of permissions on RiskMan e.g. you may want to know all the users who have access to the Incident Inbox or the Risk Reports

Navigate to Administration > Tools > Find User Tool

Note: This page has not been completely updated to reflect all the changes to the permissions so may not work for all permissions

1		My Workspace Management Administration Reports Help Log Out USER: System Manager (Manager (Ma	ger)
Fi	ind	d User(s) having Permissions	1
			1
G	ondi	tions : Must have any one permission 👻 Find Users	
	Unt	Check All Check All	
U	lser	Permissions for Incidents	
Г		No. Res Division	
		<u>NotForDisplay</u> Show only "Alerted" items in Reports	
		Show only "Alerted" items in Inbox	
		Red Revelation	
		Basic Permissions Can do Item entry	
1		Can review own/subordinates entries	
E		Can apply Distribution Lists (if enabled)	
E		Can "Bookmark" entries	
E		Can mark an entry for "Personal Alerts" (change notification)	
		Can see the Review History	
E		Can view Reminders	
E		Can "Finalize" entries	
E		Can prevent sending manager email notifications when saving an entry	
E		Can use the "Contact Riskman" (developers) link on the Help menu	
ų	-	Can use the "Print" report from an unposted entry	
[[ri	1	Entres Campias / Department Restriction of Rost Register - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	(I T
		Can View Enterprise wide Risks (No Campus® / Department specified):	
		Can Edit Enterprise wide Risks (No Campus* / Department specified):	
1		Allow user-defined access to nominated Risks.	
		Administrative Permissions	
l		Can view Document Library	
		Attach Document Permissions	
1		Can Attach Own	
l		Can View Subordinates	
1		Can View All	
1		Can Delete Own	
1		Can Delete Subordinates	
1		Can Delete All	
· _			

To search for users with particular access to RiskMan

 In the Conditions list select whether the users need to have one of the selected permissions or all the selected permissions



- 2. Check the respective user permission/s
- 3. Press Find Users
- 4. A list of users matching the selected user permission/s will display

ind User(s) having Permiss	ions	
Conditions Must have any one permission +	Find Users	
	UserName	
	Beck, Sue (beck sue)	
	Hamilton, Cassandra (Cassandra)	
	CLO (CLO) CLOTemplate Only (CLOTemplate Only)	
	Dhillon, Amritpal (Ohilon Amritpal)	
	Jeone anna (Leone Anna)	
	Cheetham, Lynn (Lynne)	
	System Manager (Manager)	
	Miller, Julie (Miller Julie)	
	Lane, Michelle (Mlane)	
	Risk Manager (Risk Manager)	
	Risk ManagerTemplate Only (Risk ManagerTemplate Only)	
	SuperUserTemplate Only (SuperUserTemplate Only)	
	Watson, Fiona (watson fiona)	

Example: List of Users who have access to the Feedback Inbox

Grant Admin Permissions

This option grants a user access to all the Administrative permissions where that user's Administrative permissions have been removed inadvertently; or remove any Specific/Restriction Details that have been set against an Administrative User e.g. Site/Location restrictions

Navigate to Administration > Tools > Grant Admin Tool

This page is only accessible via an authentication code.

It is used in conjunction with RiskMan Support

Email Log

Emails generated from RiskMan are stored in an Email Log.

(Refer to the RiskMan Email Log Guide)

The Email Log allows you to view sent and unsent emails via RiskMan to be able to identify issues. Email could be generated from Alerts, Delegation, Distribution Lists and Broadcast Emails as an example.

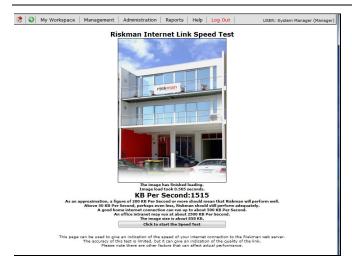
Navigate to Global setting, *Scheduled Jobs > 100) Maximum age (days) of email entries* to set automatic purging once each respective record type reaches a certain age.

Speed Test

This page tests the Internet speed to the RiskMan system you currently have open



Press the Click to Start the Speed Test button



Details on acceptable speeds will appear under the speed of your Internet. If you have concerns relating to the speed of your Internet Explorer/Network contact your IT Dept

Email Test

This option allows you to test that emails are being sent from RiskMan

If you have mail setup on your RiskMan the following fields will be prefilled; Sender's Name; Senders Email Address; Reply-To Email Address; Mail Server; Port

🎊 🥥 My Workspace 🛛 M	lanagement A	dministration	Reports H	Help Log Out	USER: System Manager (Manager)
RiskMan Email Test To	ol				
Recipient's Name:					
Recipient's Email Address (To):					
CC:					
Subject:					
Body:				*	
Sender's Name:					
Sender's Email Address:					
Reply-To Email Address:					
Mail Server:					
Port:	25				
Mail Authentication:	None -				
Username:					
Password:					
	Send Mail				

- 1. Fill in the **name** and **email address** of the **recipient** (you may want to enter your own details so you can check if the email was sent)
- 2. Enter an email subject and email body
- 3. A **username** and **password** maybe required before sending the email but in most cases this will not be required
- 4. Press Send Email

Text Editor Tool

This tool enables you to change the text on some of the pages on RiskMan. Examples include:

- Front Page text this can also be changed from Administration -> Configuration -> RiskMan Text Editor
- "Create New User Login" page

Warning	, if you have an existing VHIMS I	igin but have forgotten your username and/or	password please contact your V Frelationships are based upon a	HIMS Support person. De	NOT create another VHIMS login as incident	
Username						
Your Pass	word					
Confirm Password						
First Name						
Sumame						
Samaine			endios	121		
YOUR Campus*(s)		84	oc Hill sat Melbourne sworth	ilii		
Your Orga	nisational Email Address					
Phone nun	nber					
Your Posit	ion					
Create t	he Account				Cance	
NOTES						
NOTES.	USERNAME	Is the name you will use to login We recommend your network lo The Username must be unique.				
	PASSWORD	Is so only you or authorised people may view your forms. Password is entered twice to confirm you didn't make a typing mistake the first time.				
	FIRST NAME	Is your first name.				
	SURNAME	Is your sumame.				
	YOUR Campus*(s)	The Campus*(s) where you work	. Hold CTRL and click for	or multiple Campus	*s.	
	EMAIL	Your at work EMail address, so y	ou can be contacted.			
	PHONE	Your office phone number.				
	POSITION	Your position, which can make it	manine to find your			

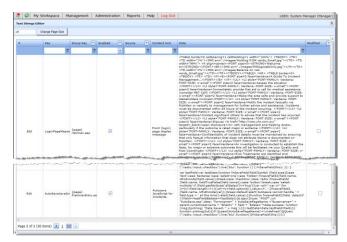
• "User Login" section on the front page

• "For New Users" section on the front page

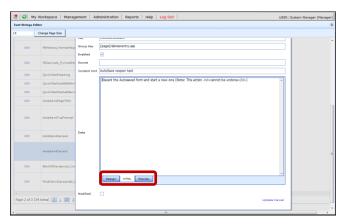


To access the Text Editor Tool

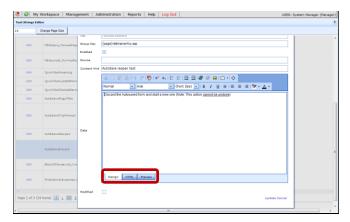
1. Select Administration -> Tools -> Text Editor Tool



Next to the text that you wish to change press the Edit button



- The text will be displayed in HTML mode by default. Press the **Design**" button at the bottom of the page
- 4. Modify the text and press **Update**



Note: If there are sections of your RiskMan that you would like text changed but you are unable to find the section in the Text editor Tool contact RiskMan support -

noreply.SupportHUB@rldarix.com

Recreate RiskMan Procedures

This page allows you to recreate certain SQL procedures and functions that need to be dynamically generated in the RiskMan system. If procedures need to be recreated you will be directed by RiskMan Support



It also allows you to turn on debugging which will show you the database field names that are used on the Register forms *(refer to example below).* This can be used by RiskMan Support to troubleshoot issues that may arise or when enhancements have been requested

		Incident Entry				
Submit this form to record the incident. You will not be able to charge the form some entered. DEBUG: Click to show the 'Value' in Ints.						
Who Was Affected?						
Incident Involved	ID: IncidentInvolved - maxlength Patient/Client	="255" Hedical Record #	ID: MedicalRecordNo - maxlength="255"			
	ID: FirstName - maxlength="255	·				
	ID: Surname - maxlength="255"					
	ID: DateOfBirth -	Age				
	ID: Sex - maxlength="50"					
	ID: Street - maxlength="150"	•				
Suburb/City	ID: Suburb - maxlength="100"					

Data Dictionary

Administration> Tools> Database> Data Dictionary

A data dictionary is now available, which permits users to see the Field label names used on forms across Registers, with the actual database field label provided. This is a useful reference tool when using Conditions in Alerts V2 and Reports V2. It is also useful when inserting fields into emails in the Letter Builder and in Alerts.

🔅 🥥 Ny Wirkspace v Nexagement v Juministration v	Analysis + Heip + Tog Out				USER: System Hanaper
tiskMan.Net Data Dictionary					
Select Register All Restricts					
An adject in a second					
Admut feren de	•				
	. R				
Submit					
Configuration Name: Training 2206					
Register: Incidenta					_
For each Register, RiskMan utilizes a variable number of tables.					
The parent structure consists of a standardized core table linked to of an	ny number of colorision lables, jo	ned one to one, to produce th	basic register reco	nd	
fou can access these table individually and manage the joins yourself, b The combined view for this Register will be verified incidents. Posted	out more will aways exist a view	to access this structure as a si	rgie object.		
The tables for this register will consist of master table Claims where Sub	Internet date of the state of the set of the set	the intent to any comber of the	And with a structure	No stablesets CL by solvers Claims	un l
o column stableasts, CL stableasts, ID				contraction of the second	
SOTE. Each register links to its own set of extension tables, they are no	t shared between registers.				
n addition, there can be any number of one to many single field tables, it					
There are also Multi Column structures known as SubForms, detailed be	elow, and other special purpose	an by country www.eg_inciden structures such as Journals, w	ich are not detailed	there. Please contact RiskMan if you	
There are also Multi Column structures known as SubForms, detailed be require assistance with these.	elow, and other special purpose	ad by courner verkeg_inciden structures such as Journals, w	ich are not detailed	i here. Please contact Riskklan if you	'
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Classification Editor

This tool is used by RiskMan Support & Clients to add, edit or delete classifications that are used in the newer style Classification Multiple Selectors *(refer to example below)*.

Webpage Dialog				-	*
Save and Exit Cancel				> Search	Go
Specialty List					
PECIALTY SET					0
Anaesthetics	۲	Emergency medicine	۲	Medical	8
III Bariatric	Display All	Emergency medicine	Display All		Display All
Cardiac surgery		 Emergency metions 			
Cardiac- interventional					
Cardiac- Interventional Cardia/ Thoradia					
- Colorectal surgery					
- [] Endoscopy					
- [] Endoscopy					
- [] ENT - [] General surgery					
- [] General surgery					
- [] Neurosurgery - [] Opthalmology					
- [] Oral/Naxillofacial/Dental - [] Orthopaedics					
- [] Other					
Plastic surgery					
- El Spinal					
- El Urology					
E El Vascular surgery					
Neonatal	8	Obstetrics	8	Paediatric	8
	Display All		Display All		Display All
Pathology	(8)	Psychiatry	8	Radiology	(8)
	Display All		Display All		Display All
Rehabilitation	8	Surgical / Procedural	8		
	Display All		Display All		
ected Classifications			Details	_	
sected classifications					
			Paediatric		

In most organisations the **Classification Editor** and **Quality Activity Classification Editor** available under the Administration menu, is used to maintain your Incident and Quality Activity Classifications respectively.

This page is only accessible via an authentication code

Note: If you are using the newer style Classification Multiple Selectors and you wish to be able to edit, delete or modify a classification please contact RiskMan support -<u>noreply.SupportHUB@rldarix.com</u>

Indicator Maintenance

This page accesses the queries behind the Indicator sets

This page is only accessible via an authentication code

It is used by RiskMan Support when trouble shooting Indicators

Code Maintenance for Large Lists

If your organisation experiences delays when opening up specific lists because they are large e.g. Site/Location list, an alternative list page to the List & Codes Maintenance is available - **Code Maintenance for Large Lists.**

This page contains all the same lists as the standard **List & Codes Maintenance** page but enables Administrators to manage these large lists more efficiently.

Note: Refer to the **RiskMan Managing Lists & Codes Guide** for more information. The permission to this menu item can be changed and the menu item itself can be moved to appear under or above the List & Codes Maintenance menu, by contacting RiskMan Support

Auto-Update List

This page displays the list of updates that have not been applied to your RiskMan system. These updates are fixes/changes that have been done by RiskMan that may affect your system. On logging onto RiskMan, a RiskMan Administrator would automatically see these updates. If they choose not to proceed with the updates, they will still be available to update at a later stage on this page

🥭 🕥 My Workspace Management Administration Reports Help Log Out	USER: System Manager (Manager)
Message from webpage	
wessage non weopage	
There is 1 update available for your RushMan system, click "OK" to review it or "Cancel" to slip	
OK Cancel	

Example: The message a RiskMan Administrator receives if there is an update to RiskMan. If the user presses **OK** a list of new and old updates that have already been applied to that version will appear. This list can also be viewed from the Auto-Update page

To apply the updates manually

- 1. Select Tools -> Auto-Update List
- 2. Press the Apply Update button

2	My W	orkspace Manage	ment Administration Reports Help Log Out USER:	System Manager (Manager)
	Versior	n Name	Description	Has Been Applied
	3.898	Feedback Field to Preserve-RoleId	Adding Role id in feedback as a field to preserve where rolename also is a field t preserve. Adding the Role id for the user's rolename selection. Deleting the Preserved Set of PFValues where role name exists but role id is null	
				Apply Updates