Introduction
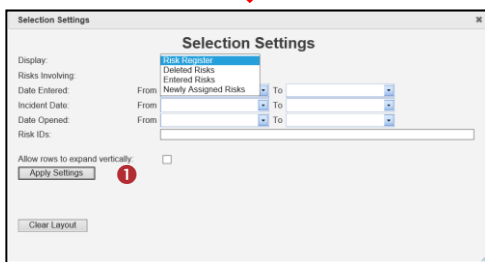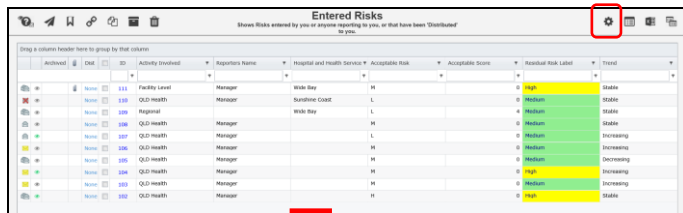
This reference guide is aimed at any user who wishes to configure one or more Risk Lists that they have permission to view.

What sorts of Risk Lists are available?

Risk Lists can be accessed from the **menu options**, your **Home Page** or by selecting the **Selection Settings: Display** list via the ⚙ icon on any displayed Risk Listing page and pressing **Apply Settings** ❶

The following describes the Risk Lists available in RiskMan. Not all users will have access to all lists – this will depend on their RiskMan role

Risk Register – Accessible to Risk/Quality Managers or Executives who can either view all the Risks in the Risk Register; Risks based on the user's Organisation/Campus restrictions; Or Risks the user has been alerted to

Entered Risks – Each user with access to the Risk Register will be able to view a list of risks they have entered; staff reporting to them have entered; they have been granted permission through distribution lists, alerts or journal alerts

Deleted Risks – Accessible to Risk/Quality Managers or Executives to view any risks that have been deleted, and restore a deleted risk if required

Newly Assigned Risks – Lists risks that have been distributed to you that you have not yet viewed

Configuring your Risk Lists

Each of the Risk lists that you have permission to view can be configured as follows:

- Change the columns displayed in the list
- Filter the risks in the list

- Group the risks by one or more selected columns e.g. Risk Owner, Residual Rating, Risk Category
- Sort your lists in numeric, alphabetical or date order

Colour coding will automatically be applied to some of the items in your list such as:

- Background colours for the **Residual**, **Inherent** and **Target** Ratings

In addition to the delivered colour backgrounds, the following additional modifications can be made to your Risk Lists

- Apply background colours to other columns in your Risk List e.g. colour coding the Risk Owners
- Change the content of a field in the list e.g. if Risk Owner = Jane Smith or John Smith change the label to show "OHS Risk Owner"
- Add Background colours for the **Trend** column or replace the words Stable, Increasing and Decreasing with a symbol. The **Trend** column displays the change in the Residual Rating (if this rating has changed e.g. Increasing, Decreasing or Stable, based on the scores behind each of your Risk Matrix ratings

Example: Risk List showing the colours against the Residual Risk Rating based on your Risk Matrix configuration and the Trend Indicator showing an arrow to identify if the risk rating has improved(decreasing), got worse (increasing) or stayed the same (stable) if the Residual Risk rating has changed

Note: Please contact RiskMan Support – noreply.SupportHUB@rldatix.com if your organisation would like to apply styles to the columns in your Risk listing pages

How do I change the columns displayed on my Risk List?
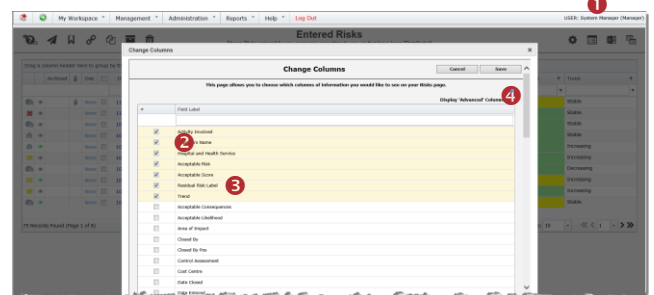
1. Click on the **Change Columns** ❶ icon
2. The columns currently displayed in your list will appear at the top of the Change Columns window highlighted in ==yellow==

3. When selecting a field to display, look in the **Column Label** column as this is the name of the field that appears on your Risk Entry form. This list is sorted in alphabetical order based on the Field label - **Risk** or **Calculated**.
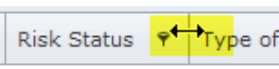
   The fields in the **"Calculated"** list are not fields in the database but are virtual fields based on the content in your Risks. These fields include

4. Check mark the **Show ❷** column if the field is to be displayed in your list, otherwise uncheck

   - **Optional:** The **Column Label ❸** can be changed if required by clicking on the appropriate heading e.g. Accountable Exec to Risk Owner

   - **Optional**: Enter a **Sort Order** for your columns by clicking on **Display 'Advanced' Columns ❹** and adding the relevant number to the sort order column

5. Press **Save** at the top of the **Change Columns** window to save your changes

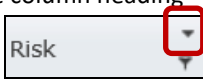**Suggested Columns to display (if you have permission to these columns)**

- **Risk Category** – How the risk is categorised
- **Risk Name** - Description of the risk
- **Risk Owner** - The name of the person who owns the risk. Use the "Calculated" field, **AccountableExecutiveFriendlyName,** as this will display the user's name rather than their login name
- **Next review Date** – When the risk is up for review
- **Residual Risk Label** – This will display the risk rating name e.g. Moderate, Low. Use the "Calculated" field, **RiskStratLabel** rather than the RiskStrat field which will only show the Risk Rating code
- **Trend** – If the residual rating has changed this will indicate to you if your risk rating has improved, stayed the same or got worse based on the scoring behind the Risk Matrix rating cells

How do I modify the column widths?

1. Click on the **line** between the **column headings ❶** that you wish to expand. The cursor will change to appear like this:

2. Drag the column to the desired width with your mouse.

3. Repeat steps 1 & 2 until your columns are displaying at the desired widths

4. Press the **Set Columns ❷** icon (*This icon will only appear when you change the width of a column*)
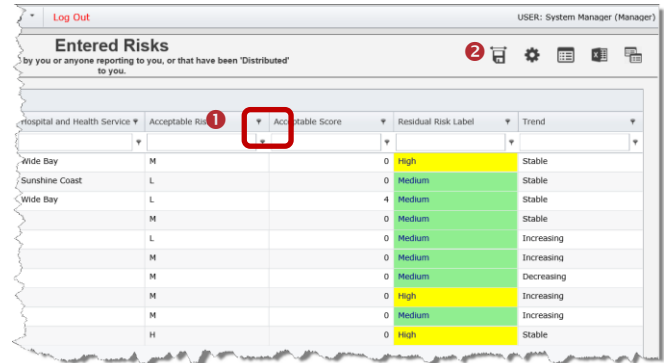
How do I sort my list of Risks?

1. Click on the respective column heading and an **up** or **down** arrow will appear next to the column heading indicating the direction of the sort:

2. To sort in the opposite direction, click on the **column heading ❶** again
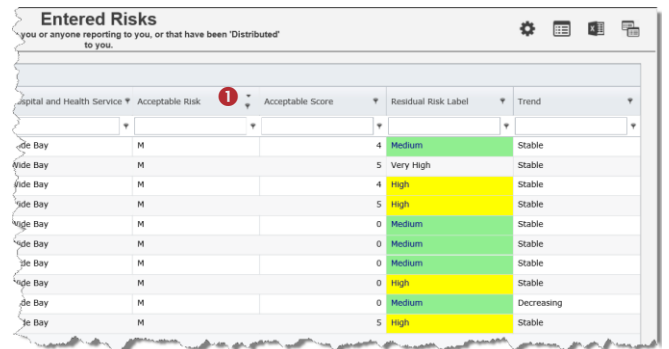
How do I filter my Risk list?

1. Select a **logical test ❶** e.g. Equals, Contains

2. Enter your **filter criteria ❷**

3. Repeat the steps 1 & 2 if you wish to filter by more than one column

4. With your cursor in any filter criteria, press **Enter**. Your list will display risks matching your filter criteria
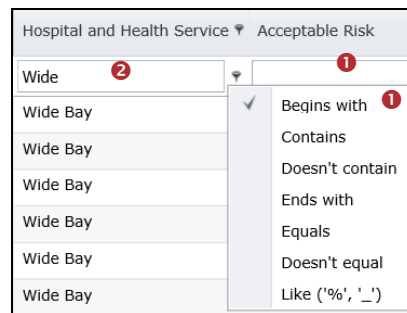

To clear your filtered list of Risks

1. Manually delete all the filter conditions under the column headings

2. When you have cleared all filters, with your cursor in the space under any column heading, press **ENTER**
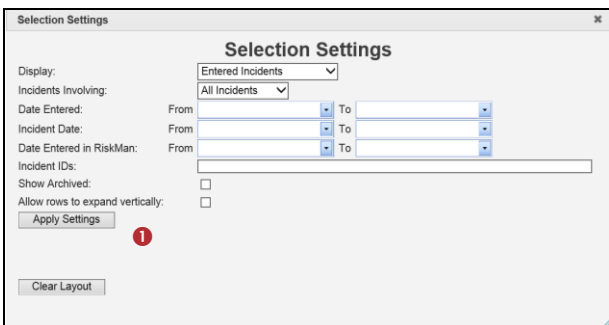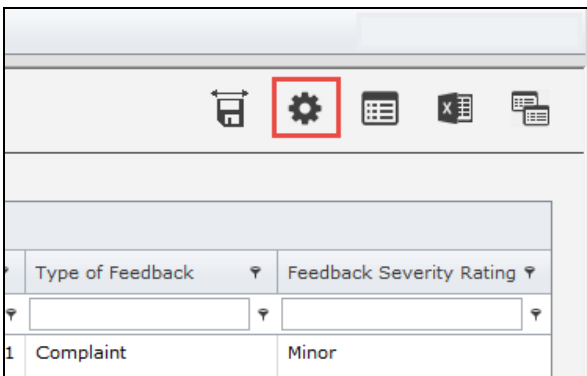
Or
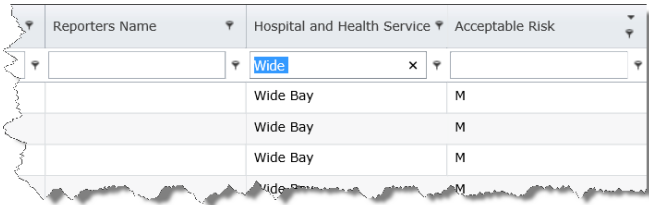
3. Another option to clear any filtering refers to the clear filter icon ❶ that present on the top left hand side of the list page when filtering has been applied.
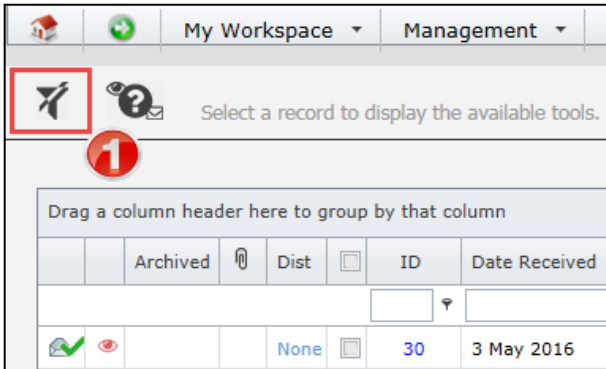

Other Filtering

1. Filtering of the Incident notifications can also be done via the fields under the **"Selection Settings"** section.

2. If you filter by any of these fields press the **Apply Settings** button ❶

How do I group my Risks by one or more of my column headings?

1. Click on a **column heading** ❶ and holding your mouse drag it to the space provided above the column headings

2. When you see **2 white arrows** ❷, release your mouse. The displayed list of risks will be grouped by that column heading ❸

3. Repeat steps 1-2 if you wish to group by more than one column
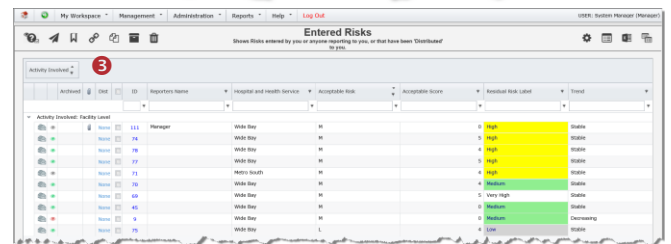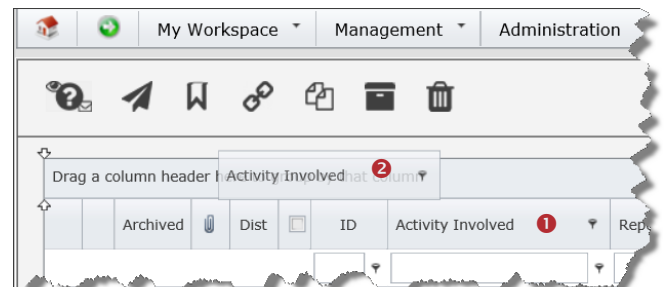

To remove a grouped Risk list

1. Click on the **grouped column heading** ❶ and holding your mouse drag it anywhere in your Risk list ❷

2. Release your mouse and the column heading will be returned to its original position

3. Repeat steps 1-2 if you wish to remove more than one grouped column
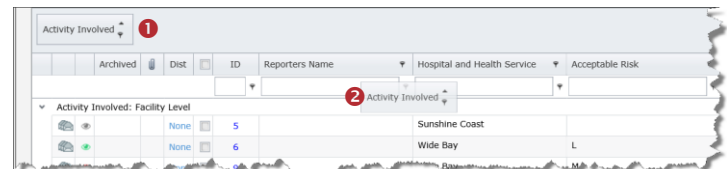
To export your list of Risks to Excel™

1. Before exporting your list to Excel™, suggest configuring your Risk list to

   - Show all the risks that you need to export i.e. Change the **Items per page** ❶

   - Filter or group your list

2. To export your Risks

- Press the **Export** icon
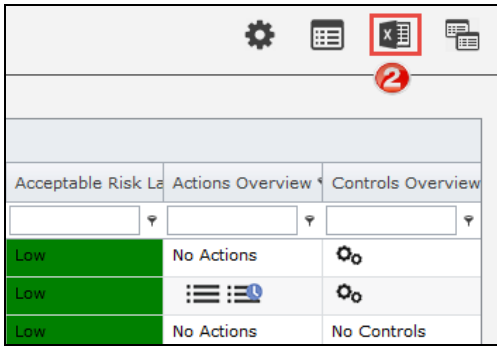
Note: The Export function will only export the incidents that are on your displayed list

Version 16 allows for formatting rules to remain after being exported to Excel™. If grouping has been applied to the list page, the grouping will also be applied to the Excel™ spreadsheet in the proper Excel™ format. This will also improve the display format of certain columns such as the Distribution List, Documents and Archived columns.