

- Working with List Pages -

FOR RISKMAN VERSION 2309

Last reviewed September 2023

CONTENTS

Introduction	3
List basics	4
The fixed columns: Explanation	5
Modifying your list	6
Changing the columns shown on your page.....	6
Change the order of your columns	7
Adjust the widths of your columns	8
Sort your list.....	8
Group the records on your list	9
Filter your list	10
Save the way you have configured your list as a “View”	11
Export the list to Excel.....	12
Selection Settings	12
Modifying the records shown on your list.....	14
Functions/Option Toolbar	14
Selection state menu items	15
Using the selection state menu items.....	17
Bookmark.....	21
Link Records	24
Clone & Link.....	26
Custom Functions	27
Delete	29
When a posted record that was deleted is restored the Date Entered field is updated	32
Archive.....	32

INTRODUCTION

Every record list that you have permission to view in RiskMan can be configured to suit your requirements. Further to this, each record list can be configured *individually*, meaning that for example if you can see the

- Entered Incidents page,
- Incident Inbox page, and
- Posted Incidents page

...you can set each one up with its own unique configuration.

You are able to:

- Change the columns being displayed, their widths, and the order in which they appear
- Change the number of rows shown per page
- Change the way the list is sorted, grouped, and filtered
- Save the way you've configured the page as a "View", and switch between your personally configured views
- Export the resulting list to a Microsoft Excel file if you wish

This guide also explains list functionality which is based on user permissions, so you might not have permission to some of these functions (it depends on your level of access). These include:

- Ability to generate a "Letter", based on an existing record in a register
- Ability to clone or update a record
- Ability to reassign ownership of a record

Note

This information in this guide applies to any register, however we have used an Incident register in the screenshots as it is the most universal register.

LIST BASICS

Here's an explanation of the common functions on your lists:

riskman Practical Innovative Risk Management

Training Site

TRAINING SITE

For Review: 1 New: 19 New Edits: 0 Inboxes: 54

My Workspace Management Administration Reports Help Log Out Feedback Module

USER: System Manager (Manager)

Select a record to display the available tools.

INBOX - Incidents for Review
New Incidents and edits of Incidents

Drag a column header here to group by that column


	Dist	ID	Group	Incident Date	Incident Involved	Facility	Location	Outcome	Summary
	None	3389		1 Jun 2012	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fell in shower
	None	3474	3480	3 Feb 2012	Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	None	3480	Master	13 Jun 2012	Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt delivered incorrect dosage instructions on medication..
	None	3481	Master	23 Jun 2012	Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Client became aggressive during meal time...
	None	3493		29 Jan 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt administered extra dose of heparin... not happy!
	None	3497		25 Feb 2012	Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SPECIMEN LOST AFTER COLLECTION
	None	3536	3531	25 Jul 2012	Volunteer	Acacia Private	Centre Block 1st Floor	ISR 4 MINOR	Pt administered extra dose of panadol
	None	3537		5 Aug 2012	Client	Acacia Private	Centre Block 4th Floor	ISR 2 HIGH	Client became aggressive during theatre transfer... because staff...
	None	3545		15 Sep 2012	Client	Acacia Private	Centre Block 7th Floor	ISR 3 MEDIUM	Pressure wound degrading to Grade 2 status
	1	3572		3 Feb 2011	Client	Acacia Private	Centre Block 7th Floor	ISR 2 HIGH	ABO Blood Incompatibly during transfusion
	None	3573		1 Feb 2011	Relative/Visitor	Acacia Private	Emergency Department	ISR 5 NEAR MISS	Visitor entered ED in an intoxicated state and abused staff
	None	3574		3 Feb 2012	Staff Member	Acacia Private	Cardiac Rehab	ISR 4 MINOR	Staff member hurt back lifting patient from bed to chair
	None	3581		31 Mar 2011	Client	Acacia Private	East Block 1st Floor	ISR 4 MINOR	Pt fell in shower...
	None	3582		1 Apr 2011	Client	Acacia Private	Patients Home	ISR 4 MINOR	Client became aggressive during home visit
	None	3583	3576	23 Feb 2011	Client	Acacia Private	GICU	ISR 4 MINOR	Client became aggressive in reception - assaulted staff member














54 Records Found (Page 1 of 4)

Items per page: 15 << 1 >>

- 1 You cannot modify these columns; they will always be displayed as-is.
- 2 Columns that you can change: Column order, widths, show/hide, etc
- 3 Pagination info: Total records and page count
- 4 Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page
- 5 Toolbar: When you select a record, the available functions/options for working with that record appear here
- 6 Toolbar: Options for configuring and working with your list overall

The fixed columns: Explanation

- 1 "Administrative" status of the record. Click the  icon for more information.
- 2 Your personal viewing status of the record. **Green:** You've never opened it. **Grey:** You have opened it. **Red:** Since you last opened it, someone else has modified it. Also, click the icon to open the Review History of the record.
- 3 The paperclip tells you there is at least 1 document attached to the record
- 4 Dist is short for Distribution List. Usually it will say None. In this example, there is a number – 1 – in one of the rows. This represents the number of users who have been put on the Distribution List for that record *who have not yet viewed it*. This column is also a shortcut – click it to distribute the record to other users.
- 5 Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.
- 6 ID number: Click on the record's ID number to open it. Note that you do not need to check the record's selection box before clicking the ID number!

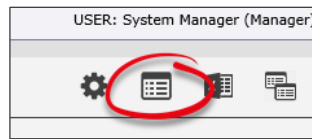
1	2	3	4	5	6
			Dist	<input type="checkbox"/>	ID ▲
					<input type="text"/>
			None	<input type="checkbox"/>	3389
			None	<input type="checkbox"/>	3474
			None	<input type="checkbox"/>	3480
			1	<input type="checkbox"/>	3481
			None	<input type="checkbox"/>	3493

MODIFYING YOUR LIST

Changing the columns shown on your page

Essentials

Click the **Change Columns** icon in the



toolbar.

The Change Columns dialog is shown. Highlighted at the top of the list are the columns currently being displayed on your list:

#	Field Label	Sort Order
<input checked="" type="checkbox"/>	Incident Date	1
<input checked="" type="checkbox"/>	Incident Involved	4
<input checked="" type="checkbox"/>	Location	5
<input checked="" type="checkbox"/>	Summary	6
<input checked="" type="checkbox"/>	Outcome	7
<input checked="" type="checkbox"/>	Facility	9999
<input type="checkbox"/>	24 Hrs prior to Patient in	9999
<input type="checkbox"/>	A.C.D. Completed After MET	9999
<input type="checkbox"/>	A.C.D. Prior	9999
<input type="checkbox"/>	A.C.D. Suggested	9999
<input type="checkbox"/>	Activity At The Time	9999
<input type="checkbox"/>	Acute Illness	9999

- ❶ Uncheck to remove column
- ❷ Scroll through the list of fields and check each one you want to display as a column on your list
- ❸ Can't find what you're after? Start typing a field name here to search the list
- ❹ Set the default order of your columns. This is useful when ever you clear a view in your list, it will assume the order you have set. Any numbers in the Sort Order column that are the same will appear in alphabetical order. In this example 9999 is set to alphabetical order
- ❺ Click the **Save** button once you're done. Your list will refresh, and the columns you selected will be displayed.

Extras

You can edit the **Field Label** if you like. You might do this to abbreviate a long field name. Your changes are only visible on this list, and they will not affect any other part of the system.

#	Field Label	Sort Order	Field Name	Field Type
<input checked="" type="checkbox"/>	Incident Date	1	IncidentDate	Incident
<input checked="" type="checkbox"/>	Incident Involved	4	IncidentInvolved	Incident
<input checked="" type="checkbox"/>	Location	5	Incident_Location	Incident
<input checked="" type="checkbox"/>	Summary	6	Description	Incident
<input checked="" type="checkbox"/>	Outcome	7	Outcome	Incident
<input checked="" type="checkbox"/>	Facility	9999	Site	Incident

Check the **Display 'Advanced' Columns** box to show additional information for each field. You might need to use this option to differentiate between several fields from your register that have the same label; in which case, you could determine which is which by referring to the **Field Name** column, which contains the unique name of that field in the database.

Change the order of your columns

Simply click and drag a column header to a new spot to rearrange your columns. When you see the two white arrows, you can release your mouse button. The system remembers your changes as you go.

Incident Involved	Facility	Location	Outcome	Summary
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

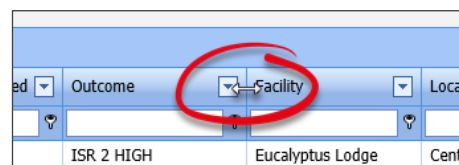
Incident Involved	Facility	Location	Outcome	Summary
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

Incident Inv.	Outcome	Facility	Location	Outcome	Summary
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP


Incident Involved	Outcome	Facility	Location	Outcome	Summary
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

Adjust the widths of your columns

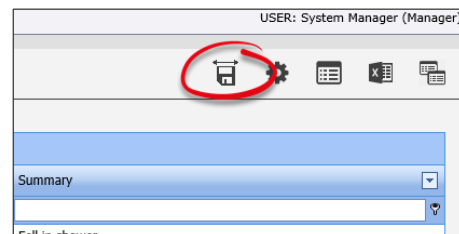
Once you have your columns in their desired order, you can adjust their widths to make the best use of the space available on your screen. We recommend adjusting them from left to right.



Put your mouse cursor on the line that separates each column. Click and drag left to right to adjust as needed.

Once you have adjusted all the column widths as desired, click the save icon  in the toolbar to save your changes.

Note that the save icon only appears in the toolbar *after* you've started adjusting the width of your first column.



Sort your list

Click on a column heading to sort your records by values in that column.


The arrow represents whether you are sorting in ascending or descending order.

The column you sort by will always be remembered on this list.

ID	Incident Date	Incident Involved
3757	12 Jan 2015	Patient/Client
3752	9 Dec 2014	Patient/Client
3742	28 Nov 2014	Patient/Client
3735	28 Nov 2014	Patient/Client

Group the records on your list

Group the records based on one of the columns showing in your list. In this example we've grouped our incidents by their severity rating:


Select a record to display the available tools.

INBOX - Incidents for Review

New Incidents and edits of Incidents

Outcome

		Dist		ID	Incident Date	Incident Involved	Facility	Group	Location	Summary

In order to group your records, click and drag the column header to the space above the list which says **Drag a column header here to group by that column**:

Drag a column header here to group by that column									
	Dist	ID	Incident Date	Incident Involved	Outcome				
	None	3757	12 Jan 2015	Patient/Client	ISR 4 MINOR				

Click and drag a column header to the grouping area. When you see the two white arrows, you can release your mouse button. The system remembers the groupings you have added.

Drag a column header here to group by that column									
	Dist	ID	Incident Date	Incident Involved	Outcome	Facility			
	None	3757	12 Jan 2015	Patient/Client	ISR 4 MINOR	Acacia Private			
	None	3752	9 Dec 2014	Patient/Client	ISR 3 MEDIUM	Acacia Private			
	None	3742	28 Nov 2014	Patient/Client	ISR 3 MEDIUM	Acacia Private			
	None	3735	28 Nov 2014	Patient/Client	ISR 4 MINOR	Acacia Private			
	None	3711	22 Sep 2014	Staff Member	ISR 4 MINOR	Eucalyptus Lodge			
	None	3710	19 Sep 2014	Patient/Client	ISR 4 MINOR	Acacia Private			

Drag a column header here to group by that column									
	Dist	ID	Incident Date	Incident Involved	Outcome	Facility			
	None	3757	12 Jan 2015	Patient/Client	ISR 4 MINOR	Acacia Private			
	None	3752	9 Dec 2014	Patient/Client	ISR 3 MEDIUM	Acacia Private			
	None	3742	28 Nov 2014	Patient/Client	ISR 3 MEDIUM	Acacia Private			
	None	3735	28 Nov 2014	Patient/Client	ISR 4 MINOR	Acacia Private			
	None	3711	22 Sep 2014	Staff Member	ISR 4 MINOR	Eucalyptus Lodge			
	None	3710	19 Sep 2014	Patient/Client	ISR 4 MINOR	Acacia Private			

You can add subsequent grouping levels by following the same steps.

To **remove** a level of grouping, simply click and drag the column header back to where you want it to be in the list.

Filter your list

You can apply a filter to one or more of the columns showing on your list, so that you only see a specific subset of the records in your list. Each column header has a filter box underneath it:

Select a record to display the available tools.

INBOX - Incidents for Review
New Incidents and edits of Incidents

Drag a column header here to group by that column

	Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
	None	3389		1 Jun 2012	Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	Fell in shower
	None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	None	3480	Master	13 Jun 2012	Intervention	ISR 4 MINOR	Acacia Private	Dayton	Pt delivered incorrect dosage instructions on medication...
	None	3481	Master	23 Jun 2012	Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Ce...	Client became aggressive during meal time...
	None	3493		29 Jan 2012	Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	Pt administered extra dose of heparin... not happy!
	None	3497		25 Feb 2012	Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	SPECIMEN LOST AFTER COLLECTION

Click the funnel icon to select the type of filter test you want to apply:

Incident Involved	Outcome	Facility
Patient/Client	<input checked="" type="checkbox"/> Begins with	Euc
Staff Member	<input type="checkbox"/> Contains	Euc
Intervention	<input type="checkbox"/> Doesn't contain	Aca
Client	<input type="checkbox"/> Ends with	Euc
Client	<input type="checkbox"/> Equals	Aca
Client	<input type="checkbox"/> Doesn't equal	Aca
Client	<input type="checkbox"/> Like ('%', '_')	Aca
Volunteer		Aca

Incident Date	Incident Involved	Outcome
1 Jun 2012	<input checked="" type="checkbox"/> Equals	HIG
3 Feb 2012	<input type="checkbox"/> Doesn't equal	MIN
13 Jun 2012	<input type="checkbox"/> Is less than	MIN
23 Jun 2012	<input type="checkbox"/> Is less than or equal to	SEV
29 Jan 2012	<input type="checkbox"/> Is greater than	MEC
25 Feb 2012	<input type="checkbox"/> Is greater than or equal to	MEC

Text: Filter tests that can be used against data fields

Numbers: Filter tests that can be used against date / time / numeric fields


Note: When filtering your list that is a multi-select field, you must use the "contains" filter and not "equal". The reason for this is the way the values are stored behind the scenes and for technical reasons that you won't be able to see

Type the desired value and press Enter on your keyboard. Your list will then only display matching records:

7 Records Found (Page 1 of 1)

Items per page: 15

	Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
	None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardiac Rehab	Staff member hurt back lifting patient from bed to chair
	None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main Entrance	I was assaulted by a patient outside main entrance when I was coming t...
	None	3591		19 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 2nd Floor	Assault by client in reception
	1	3631	Master	3 Feb 2012	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 3rd Floor	Became aggressive towards a staff member
	1	3697	3696	7 Jan 2013	Staff Member	ISR 4 MINOR	Acacia Private	Ward 1F	Fell over
	None	3711		22 Sep 2014	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Applicances	stuff stuff stuff

To remove a filter, click into the filter box, delete your filter criteria, and press the Enter key on your keyboard. To remove all filters at once, click the **Clear Filter** icon  in the toolbar:

Select a record to display the available tools.

INBOX - Incidents for Review
New Incidents and edits of Incidents

Drag a column header here to group by that column

	Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location
	None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafete
	None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardia
	None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main E

Once you have setup the columns you want, and applied sorting, filtering, or grouping to your list, you can then save that configuration as what is called a **View**. You can have multiple saved views that you can switch between with the click of your mouse.

	Unit	Age	Group	Incident Date	Outcome	Priority	Location	Summary
Incident Overview: Volunteer								
	None	2126	3531	25 Jul 2012	IS-4 HEMORR	Accata Private	Centre Block 1st Floor	Re administered extra dose of paracetol
	None	2520	18 Aug 2011	IS-3 METRODIS	Accata Private	Main Entrance		Assault by a patient outside main entrance via
	None	2531	19 Aug 2011	IS-4 HEMORR	Accata Private	Centre Block 2nd Floor		I was called in reception
	None	2524	2 Feb 2012	IS-4 HEMORR	Accata Private	Cardiac Failure		Staff member but back lifting patient from bed to chair
	None	2424	3 Feb 2012	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Staff left office and transfered across an entrance, 2nd stop
	None	2421	3 Mar 2012	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Decline apogee towards a staff member
	None	3687	3 Jun 2013	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Well off
	None	2211	22 Sep 2014	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Staff left shift
Incident Overview: Kidney/Volunteer								
	None	2522	1 Feb 2011	IS-3 TIGAR MISS	Accata Private	Emergency Department		Visitor entered ED in an intoxicated state and abused...
Incident Overview: Receipts								
	None	1391	5 Mar 2013	IS-4 HEMORR	Accata Private	Cafeteria		WASH appear to be water damaged
Incident Overview: Patient/Client								
	None	3686	31 Jul 2011	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Consulting suite
	None	3620	17 Aug 2011	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Patient fell in shower
	None	3639	30 Jul 2011	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Incense apogee towards a staff member
	None	3635	6 Feb 2012	IS-4 HEMORR	Cardiac Failure	Cardiac Failure		Incurred dose of medication given to patient
	None	3663	21 Feb 2012	IS-3 TIGAR MISS	Accata Private	Cardiac Failure		Client apogee towards the staff member

54 Records Found (Page 1 of 4)

Items per page: 15

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with the text 'ew' on the left and several icons on the right: a gear for settings, a grid for views, an 'X' icon for reports, and a document icon for forms. Below the navigation bar, there is a table with columns 'Location' and 'Summary'. A red arrow points from the 'ew' text in the navigation bar to the 'ew' text in the table header.

- Views

Views

Views allow you to save the current configuration of your list of records (columns displayed, sorting, grouping and even any filtering applied either from the grid or the Selection Settings popup) for future use. You can then Apply any View you have previously saved and instantly change the setup of your list.

Save the current list configuration as a View

1

2

Saved Views for the (Incident Inbox).

Apply	View Name	Delete
	By Location and II	
	By Outcome	

Log Out USER: System Manager (Manager)

- Incidents for Review

few Incidents and edit of Incidents

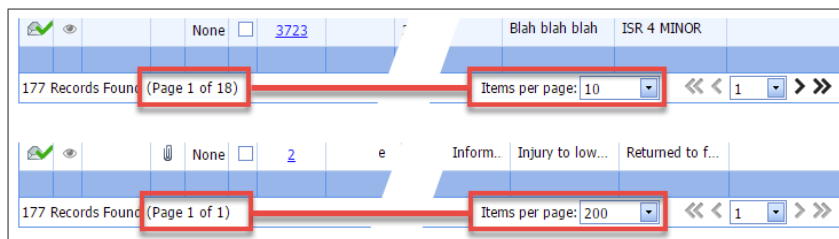
View Name	Apply
By Incident Involved	⚡
By Location and II	⚡
By Outcome	⚡

Priority Location Summary

Export the list to Excel

You can export the records shown on the current list by clicking the Excel icon  in the toolbar.

Only the first page is exported, so if you list contains more records than can be displayed on one page because of your pagination settings, simply increase the number of items per page so that they fit on to one page.



Note

The Export to Excel function may not be available as it is permissioned by your Administrator.

Selection Settings

In the toolbar, you'll note the Selection Settings cog icon . It contains the following functionality:

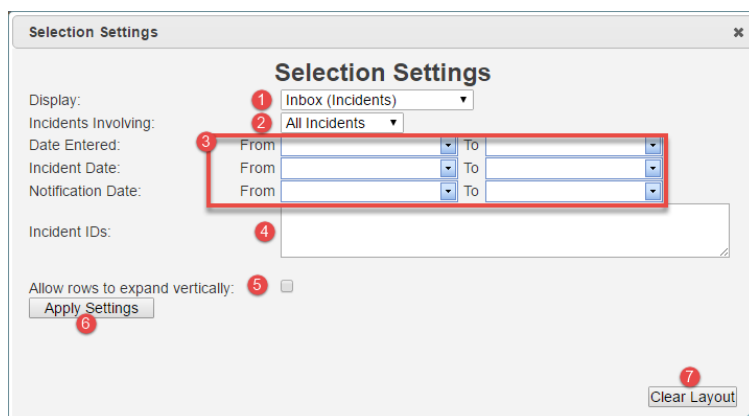
❶ Switch between the various record lists that you have permission to view

❷ Restrict the records being shown on your page by record type; in this example by Incident Involved

❸ Restrict the records being shown on your page using date filters (the date fields available will vary by register)

❹ Restrict the records being shown on your page by specific record ID numbers. Separate multiple ID numbers using a comma, e.g. 51,73,106 etc

❺ You set the width of the columns you have chosen to display on your list. By default, if any individual cell contains more information than can be shown, the information will be truncated, and an ellipsis displayed instead.



Enabling this setting will force the content to be displayed; information in the fields will wrap instead of being truncated.

Summary	Summary
Visitor entered ED in an intoxicated state an...	Visitor entered ED in an intoxicated state and abused staff
ABO Blood Incompatibly during transfusion	ABO Blood Incompatibly during transfusion
Patient has incurred complication with stag...	Patient has incurred complication with stage 3 pressure ulcer
Client became aggressive in reception - assa...	Client became aggressive in reception - assaulted staff member
person became aggressive	

Left: Setting turned off Right: Setting turned on

⑥ Once you have configured the various settings, click the **Apply Settings** button. Your list will refresh with your desired settings in place. The settings you apply here will be remembered until you decide to change them.

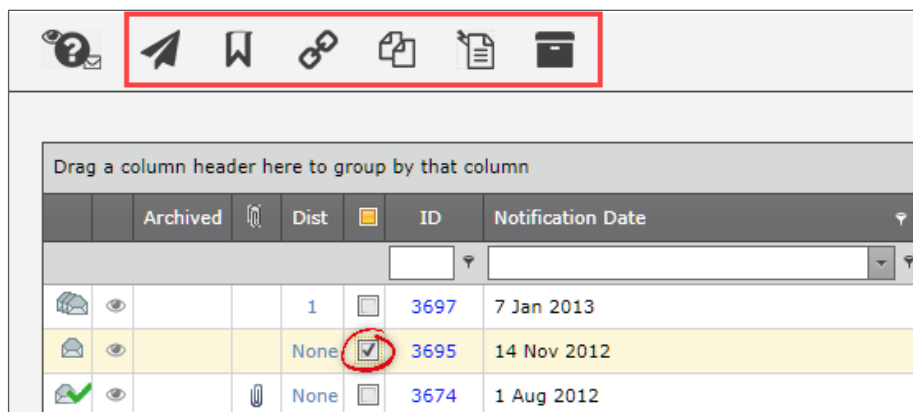
⑦ Should you wish to return your list back to a “default” configuration, click the **Clear Layout** button. This returns your list to the default settings, including columns displayed, removing all sorting, filtering, and grouping, and clears all of the settings applied in the Selection Settings dialog. Note that any **Views** you have created will not be affected by this action.

MODIFYING THE RECORDS SHOWN ON YOUR LIST

Functions/Option Toolbar

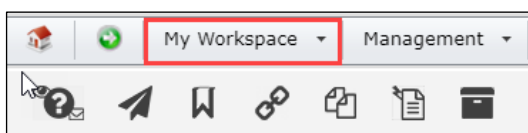
When a record is selected from a list by clicking on the check box in the Selection column a Function/Option toolbar of icons will appear.

The Functions/Options icons are shown on the top left of the screen, underneath the menu buttons.

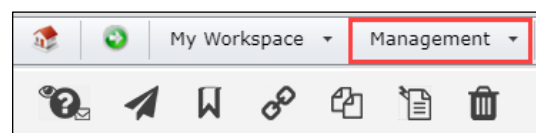


Depending upon the Register you are viewing and your user permissions, the number of available icons you see displayed will vary:

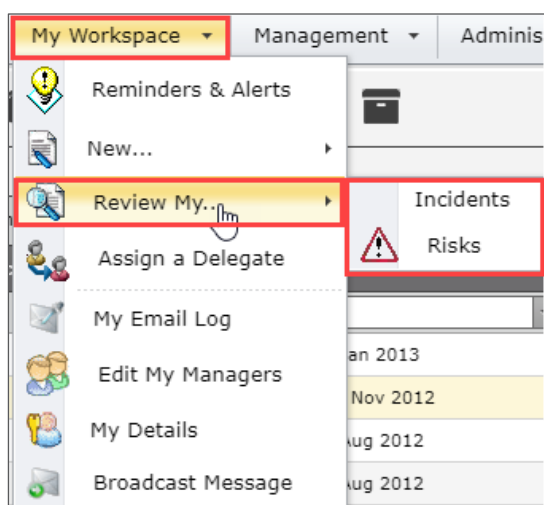
Icons available under “My Workspace” tab.



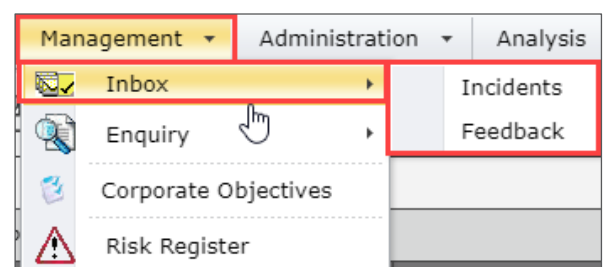
Icons available under the “Management” tab.



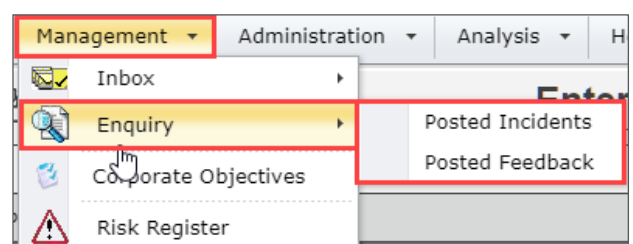
Review My > Incidents



Inbox > Incidents



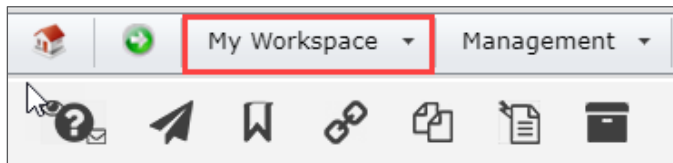
Enquiry > Posted Incidents



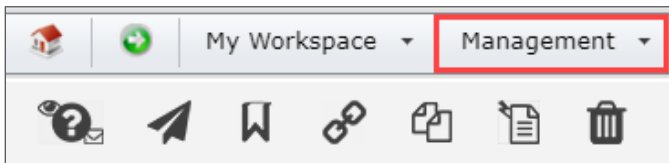
Selection state menu items

Below is a list of the Selection state menu items available in the My Workspace and Management lists.

My Workspace icons



Management icons



Icon Legend

This icon opens an info page that has descriptions of all the **Record Status** Icons displayed in the first column of the record lists.



Yellow closed envelope

A new item that has not yet been examined by an administrator.



Grey open envelope with a red x

A deleted item.



Grey open envelope

An item that has been viewed, but not posted yet.



Green eye

An item that you have never viewed.



Three Yellow closed envelopes

An edit of an item, not yet viewed by an administrator, not previously posted.



Red eye

An item you have previously viewed, but has since been updated. This may include Journal changes.



Three Grey open envelopes

An edit of an item, has been viewed by an administrator, not previously posted.



Grey eye

An item that has not changed since you last viewed it.



Two red and one grey open envelope

An edit of an item, has been viewed by an administrator, there is a posted version.



Two red and one yellow closed envelope

An edit of an item, has been viewed by an administrator, there is a posted version.



Grey open envelope with a green check mark

A posted item.



Distribution List

Allows you to distribute access of the selected record to other users.



Bookmark

Bookmarks the selected record. The bookmark will appear in your bookmark widget on your Homepage and in your Reminders & Alerts page.



Link Records

Allows you to link two or more records together because they are relevant to each other in some way.

Once you have selected a record, click this button to open the Linked Records dialog. From there you will be able to select records that you want to link together.



Clone & Link

Creates a new record based on an existing record. When submitted, those two records (the original and the clone) will be linked together.



Custom Functions

(Letter Builder or Bulk Assign Managers)

The Custom Functions allows you to access Letter Builder letters and/or the Bulk Assign Managers function.



Delete

Deletes the selected record/s. A record may also be restored, if necessary, and if you have permission to do so.

*Note: Archive is available only from the **Review My > Incidents** list*



Archive


This allows the user to mark a record as “Archived” and hides it from their **Review My > Incidents** list.

Using the selection state menu items



Distribution List

To add or remove users to or from a records Distribution List - do the following:

- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column
- 2 **Open the Distribution List dialogue** – Click on the Distribution List icon  in the Selection State Menu

Entered Incidents									
Shows Incidents entered by you or anyone reporting to you, e									
Drag a column header here to group by that column									
	Archived		Dist		ID	Notification Date	Reporters Name	Surname	
			1	<input type="checkbox"/>	3697	7 Jan 2013	Default User	Hayden	
			None	<input type="checkbox"/>	3695	14 Nov 2012	System Manager	Smyth	
			None	<input type="checkbox"/>	3674	1 Aug 2012	Faulkner, Laura	Faulkner	
		Yes	1	<input checked="" type="checkbox"/>	3672	1 Aug 2012	Hayden, Anne	Hayden	
			1	<input type="checkbox"/>	3671	1 Aug 2012	Nicolaidis, Christine	Mctest	
			None	<input type="checkbox"/>	3667	1 Aug 2012	Nicolaidis, Christine	McTest	

Incident Distribution List – From the Distribution List window you can assign Riskman users to the chosen Incident's Distribution List.

Distribution List

Incident Distribution List

Incident ID: 3674

Notification Date	Reporters Name	Facility	Location	Description
1 Aug 2012 00:00	Faulkner, Laura	Acacia Private Centre Block 3rd Floor	Patient aggressive towards staff member	

Unassigned

Assigned

Double-Click a name to assign or unassign.

Filter List

Please enter any additional information to accompany the distribution list email:

To assign a user to the Distribution List do the following:

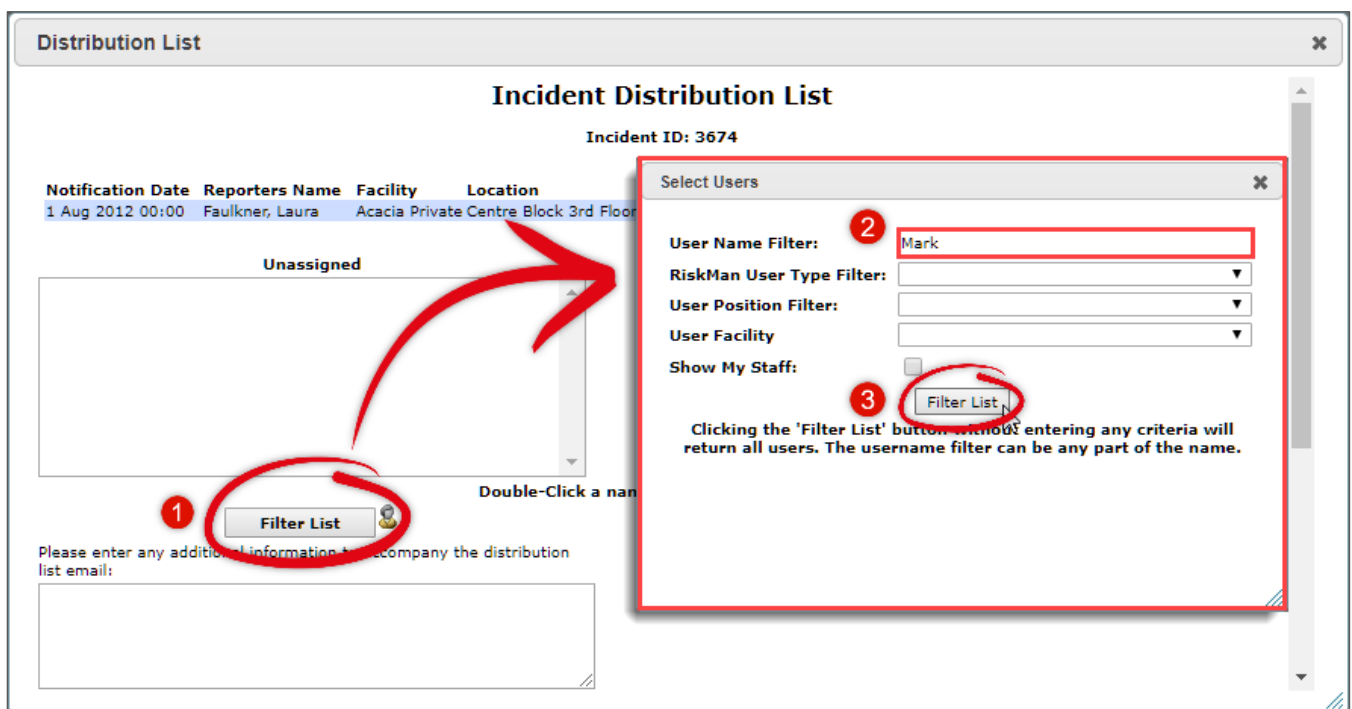
- 1 Click on the **Filter List** button in Distribution List window. This will open the **Select Users** window
- 2 Type the name of the user you wish to assign

Alternately you can use the drop-down lists to filter the users by:

- Riskman User Type
- User Position
- User Facility

Note: The **Show My Staff** check box will filter a list of users that have been assigned to you in the Manager/Staff Module or your Organisation Structure register

- 3 Click on the **Filter List** button on the **Select Users** window



- 4 The name of the user will display in the **Unassigned** window on the left. Click on the name of the user you want to assign record access via the Distribution List
- 5 Click on the **Assign >** button.

Distribution List

Incident Distribution List

Incident ID: 3674

Notification Date	Reporters Name	Facility	Location	Description
1 Aug 2012 00:00	Faulkner, Laura	Acacia Private Centre	Block 3rd Floor	Patient aggressive towards staff member

Unassigned

Marky Mark (Marky Mark)

5

Assign >

Assigned

Double-Click a name to assign or unassign.

Filter List

Please enter any additional information to accompany the distribution list email:

The users name will move to the **Assigned window**

Unassigned

Assigned

Marky Mark (Marky Mark) (on 11 Nov 2019 12:12)

Double-Click a name to assign or unassign.

Once you have assigned a user to the Distribution List, you can manage the list by selecting the users and moving them from Unassigned list to the Assigned list and back.

Unassigned

Assigned

Marky Mark (Marky Mark) (on 13 Jan 2020 12:11)

< Remove

Double-Click a name to assign or unassign.

Note: double-clicking on a name in a list will move it to the adjacent list.

Below is a diagram listing all the items found in the Distribution List dialogue.

- 1 Incident Record details**
Details of the Incident you are working on
- 2 Unassigned Users list**
A filtered list of users that are not yet assigned
- 3 Assign button**
Moves a user from the unassigned list to the assigned list
- 4 Remove button**
Moves a user from the assigned list to the unassigned list
- 5 Assigned Users list**
The list of all users assigned to the Distribution List
- 6 Filter List button**
Opens the Select Users search window
- 7 Email message text box**
Allows you to send a message to the assigned users
- 8 Send email & Close button**
Applies the Distribution List and sends email notification
- 9 Incident record Review History**
Gives you access to the Review History
- 10 Show More... button**
Expands the Review History window to display 10 entries.
- 11 Show All... button**
Expands the Review History window to show all entries

Distribution List

Incident Distribution List

Incident ID: 3674

1

Notification Date

Reporters Name

Facility

Location

Description

1 Aug 2012 00:00

Faulkner, Laura

Acacia Private Centre Block 3rd Floor Patient aggressive towards staff member

Unassigned

2

Fernandez, Brett (Brett)

Hayden, Anne (anneh)

Hensley, Jonathan (Jonathan E Hensley)

Lauren Manager (Lauren Manager)

Risk Manager (Risk Manager)

3

Assign >

4

< Remove

Assigned

5

Marky Mark (Marky Mark) (on 5 Nov 2019 20:15)

Lauren Haupt (lhaupt) (on 5 Nov 2019 20:28)

Double-Click a name to assign or unassign.

6

Filter List

Please enter any additional information to accompany the distribution list email:

7

8

Send Email & Close

Review History

9

Date

User

Notes

1 Aug 2012 12:17

Faulkner, Laura (lauraf)

Created the incident item.

1 Aug 2012 12:17

Risk Manager Email SENT.

1 Aug 2012 12:18

Esler, Scott D. (Scott Esler)

User Alerted and Email NOT SENT. Alert ID: 19

15 Aug 2012 11:17

Welsh, Simon (Simon)

Email SENT: Distribution List [Email](#)

15 Aug 2012 11:23

Welsh, Simon (Simon)

Incident first viewed after being assigned on Faulkner, Laura (lauraf)'s distribution list.

10

Show More...

11

Show All...



Bookmark

When you **Bookmark** a record, it will appear in the Bookmarked Records widget on the Homepage and in the Bookmarks tab in the Reminders & Alerts page (as pictured on the following page).

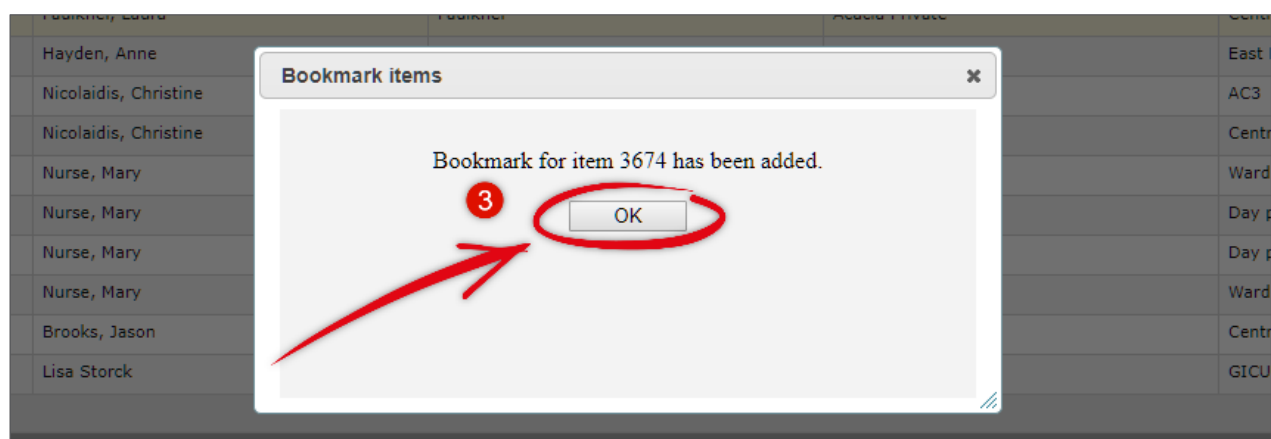
To Bookmark a record from any Register list, do the following:

- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to apply a distribution list change to by clicking on the check box in the Selection State column
- 2 **Bookmark the record** – Click on the Bookmark icon in the Selection State Menu

Entered Incidents									
Shows Incidents entered by you or anyone reporting to you, (
Drag a column header here to group by that column									
	Archived		Dist		ID	Notification Date	Reporters Name	Surname	
			1	<input type="checkbox"/>	3697	7 Jan 2013	Default User	Hayden	
			None	<input type="checkbox"/>	3695	14 Nov 2012	System Manager	Smyth	
			None	<input type="checkbox"/>	3674	1 Aug 2012	Faulkner, Laura	Faulkner	
	Yes		1	<input checked="" type="checkbox"/>	3672	1 Aug 2012	Hayden, Anne	Hayden	
			1	<input type="checkbox"/>	3671	1 Aug 2012	Nicolaidis, Christine	Mctest	
			None	<input type="checkbox"/>	3667	1 Aug 2012	Nicolaidis, Christine	McTest	

The Bookmark Items confirmation dialogue will be displayed.

- 3 **Bookmark items** – Click the **OK** button to confirm your choice



Accessing your Bookmarked items – From the **Homepage** there are four options allowing you to navigate to your Bookmarked items.

- 1 **Reminders & Alerts** - From the menu click on **My Workspace > Reminders & Alerts**
- 2 **Assigned Date (Direct link to the record)** From Bookmarked Records widget on the Homepage click on the Incident date. This will take you directly to the Incident record
- 3 **Bookmarked Records** - From Bookmarked Records widget on the Homepage click on the **Click here to view Bookmarked Records** link. This will open the Bookmarked Items page in Reminders & Alerts
- 4 **Notifications** - From Notifications widget on the Homepage click on the Bookmark link

The screenshot shows the RLDatix homepage with several widgets. A red box labeled '1' highlights the 'Reminders & Alerts' link in the left-hand menu. A red box labeled '2' highlights the '6 Nov 2019' date in the 'Bookmarked Records' table. A red box labeled '3' highlights the 'Click here to view Bookmarked records.' link below the table. A red box labeled '4' highlights the '1 Bookmark is listed' notification in the 'Notifications' section.

Type	Days Assigned	ID	Notification Date	Summary
Incident	6 Nov 2019	3674	1 Aug 2012	Patient aggressive towards staff member

Removing a Bookmark – You can remove a Bookmark from a record by one of the two following methods.

Method 1

From a list select the record by clicking on the check box in the Selection State column.

The screenshot shows a table with columns for Selection State, Dist, ID, and Incident Date. A red arrow points to the bookmark icon in the Selection State column for the first row (ID 3910).

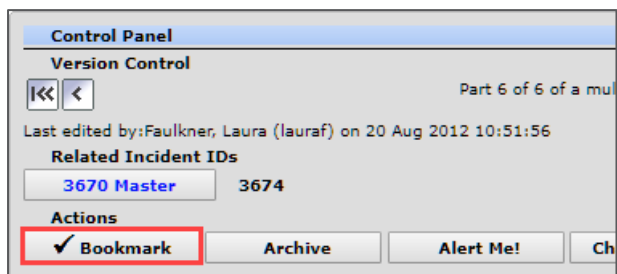
Selection State	Dist	ID	Incident Date
1		3910	1 Jul 2021
None		3909	1 Jul 2021
None		3881	11 May 2020
2		3852	8 Mar 2019

Click the Bookmark icon then click **OK** in the Bookmark Items dialogue window.

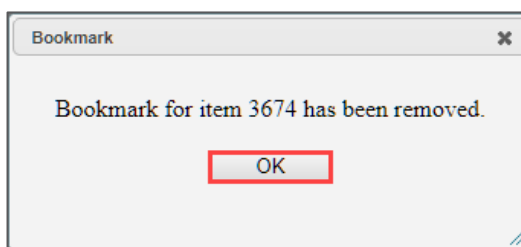
The screenshot shows a 'Bookmark' dialog box with the message 'Bookmark for item 3910 has been removed.' and an 'OK' button.

Method 2

Open the record and from the Control Panel click the **Bookmark** button




Click **OK** in the Bookmark Items dialogue window

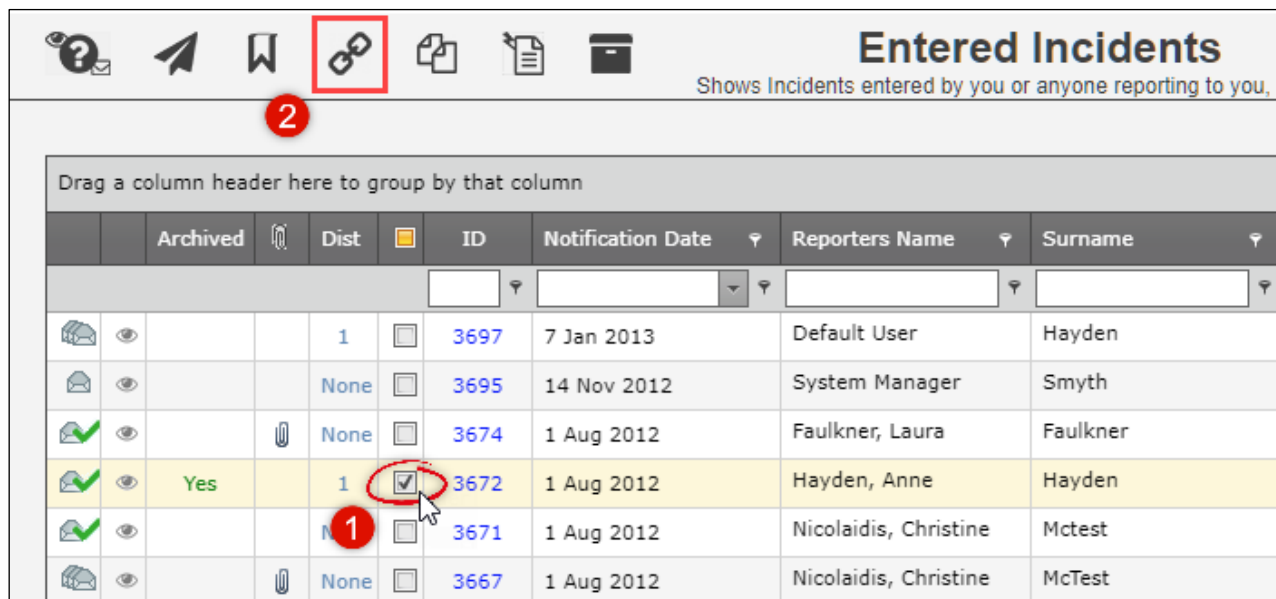




Link Records

To Link two or more Incident records - do the following:



- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to link by clicking on the check box in the Selection State column
- 2 **Open the Link Records dialogue** – Click on the Link Records icon  in the Selection State Menu



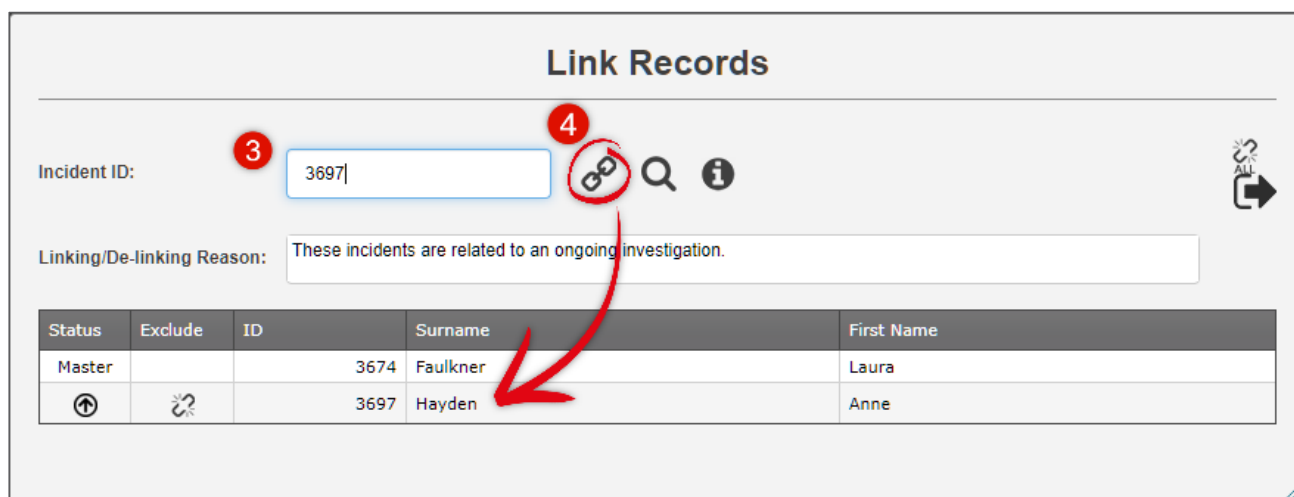
Entered Incidents
Shows Incidents entered by you or anyone reporting to you, etc.

Drag a column header here to group by that column

	Archived	Dist	ID	Notification Date	Reporters Name	Surname
		1	3697	7 Jan 2013	Default User	Hayden
		None	3695	14 Nov 2012	System Manager	Smyth
		None	3674	1 Aug 2012	Faulkner, Laura	Faulkner
	Yes	1	3672	1 Aug 2012	Hayden, Anne	Hayden
		None	3671	1 Aug 2012	Nicolaidis, Christine	McTest
		None	3667	1 Aug 2012	Nicolaidis, Christine	McTest

- 3 **Enter/Search** – Enter the Incident ID number that you want to link to the present record. Alternately, you can search for a record by clicking on the Search icon 
- 4 **Link the records** – Click on the Add to Group icon . The Linking/De-linking Reason text field is for entering your reason for linking or de-linking the records. This field is optional

Note: The Linking /De-linking field must be enabled in Global Setting to have it appear in this window.



Link Records

Incident ID:

Linking/De-linking Reason:

Status	Exclude	ID	Surname	First Name
Master		3674	Faulkner	Laura
		3697	Hayden	Anne

Other functions available in the Link Records window.

Link Records

Incident ID: 🔗 🔍 ⓘ

Linking/De-linking Reason:

Status	Exclude	ID	Surname	First Name
Master		3674	Faulkner	Laura
		3697	Hayden	Anne

3

4

1

2

- 1

Promote

This will move the record up the list of linked items. Moving a record to the top of the list will make that record the “Master” record in the group
- 2

Exclude

This will remove the record from the group
- 3

Dissolve Group

This will dissolve the group completely removing ALL links
- 4


Close


























This will close the Link Records window



Clone & Link

This will open a new Incident form based on an existing record and link it to the that record that it was cloned from.

- 1 **Select the record** - From any Register List (the **Entered Incidents** List is used in this example) select the record that you want to Clone & Link by clicking on the check box in the Selection State column
- 2 **Create a Cloned record** – Click on the Clone & Link icon  in the Selection State Menu

Entered Incidents									
Shows Incidents entered by you or anyone reporting to you, c									
<div>        </div>									
2									
Drag a column header here to group by that column									
	Archived		Dist		ID	Notification Date	Reporters Name	Surname	
			1		3697	7 Jan 2013	Default User	Hayden	
			None		3695	14 Nov 2012	System Manager	Smyth	
			None		3674	1 Aug 2012	Faulkner, Laura	Faulkner	
		Yes	1		3672	1 Aug 2012	Hayden, Anne	Hayden	
			1		3671	1 Aug 2012	Nicolaidis, Christine	McTest	
			None		3667	1 Aug 2012	Nicolaidis, Christine	McTest	

Cloned records will be based on the original record; however, they will not copy any personal information. For example; a cloned record will not contain First Name, Surname, Date of Birth, or Address.

Cloned records will be linked to the original “Master” record. This link to the Master record can be removed as described in the previous Link Records section.




Custom Functions

This icon give you access to one of three Custom functions.

1. Letter Builder shortcuts
2. Health Legal Assign Managers or Risk Assign Managers
3. Bulk Update Records

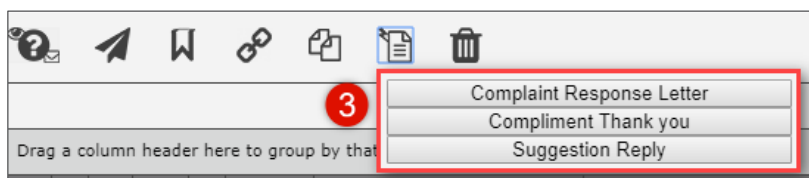
Access to these functions is dependent on the registers in your system and your level of permission.

The Custom Functions button is not a default function, it must be added to the menu before it is available.

- 1 **Letter Builder** - From any Register List (the Entered Incidents List is used in this example) select the record that you want to apply a Letter Builder letter to by clicking on the check box in the Selection State column
- 2 **Print the Letter** – Click on the Custom Functions icon  in the Selection State Menu

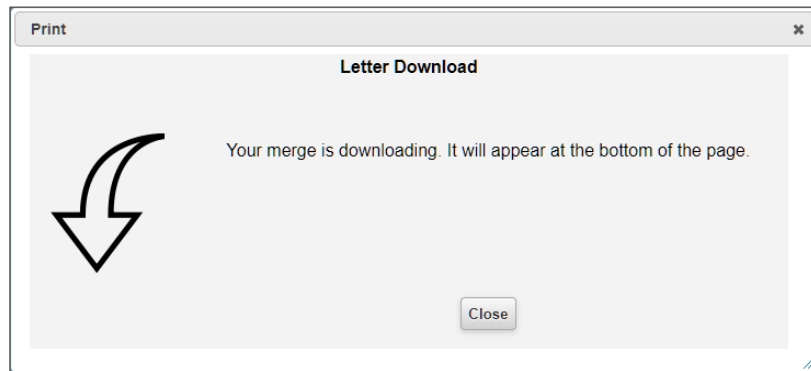
Archived	Dist	ID	Notification Date	Reporters Name	Surname
	1	3697	7 Jan 2013	Default User	Hayden
	None	3695	14 Nov 2012	System Manager	Smyth
	None	3674	1 Aug 2012	Faulkner, Laura	Faulkner
Yes	1	3672	1 Aug 2012	Hayden, Anne	Hayden
	1	3671	1 Aug 2012	Nicolaidis, Christine	Mctest
	None	3667	1 Aug 2012	Nicolaidis, Christine	McTest

- 3 Select the letter you want to print from the list




The data merge will start and the Print dialogue will open.

For more information regarding the Letter Builder see the Letter Builder reference guide.



Undelete a Record

Once a record has been deleted from a list under the Management menu you will no longer see the record in the **Inbox** or the **Posted Incidents** lists.

- 1 To undelete a record, go to the **INBOX - Incidents for Review** or the **Posted Incidents** list
- 2 **Open Selection Settings** – Click on the cog  icon to open the Selection Settings window

Posted Incidents						
Incidents accepted and reviewed, ready for reports.						
Incident Involve	Facility	Location	Date Entered	Review Status	Severity	Surname
Patient/Client	Acacia Private	Adminstration	30 Apr 2019	Pending	ISR 3 MEDIUM	Ragnarok
Patient/Client	Eucalyptus L...	Adminstration	24 Apr 2019	Pending	ISR 4 MINOR	Spatt
Patient/Client	Cabell Huntin...	Carpark (visit...	23 Apr 2019	Pending	ISR 4 MINOR	boo
Patient/Client	Wattle Private	Adminstration	22 Feb 2019	Pending	ISR 4 MINOR	Johnson

- 3 **Display Deleted Incidents** – Click the Display dropdown list and select **Deleted Incidents**
- 4 Then click on the **Apply Settings** button. All deleted records will be displayed in the **Deleted Incidents** list

Selection Settings

Display:

Incidents Involving:

Date Entered:

Incident Date:

Notification Date:

Incident IDs:

From

From

From

Posted Incidents

Inbox (Incidents)

Deleted Incidents

Accepted Incidents

All Incidents

Posted Incidents

Entered Incidents

Newly Assigned Incidents

To


To











To

Allow rows to expand vertically:



























Apply Settings

Clear Layout

- 4 **Select the record** - From the **Deleted Incidents** List select the record that you want to restore by clicking on the check box in the Selection State column
- 5 **Restore the record** – Click on the Restore icon  in the Selection State Menu. The record will now be visible in the **Inbox** or **Posted Incidents** Lists






DELETED INCIDENTS									
Drag a column header here to group by that column									
			Dist		ID	Notification Date	Reporters Name	Surname	Facility
			None	<input type="checkbox"/>	3850	30 Apr 2019	Default User	www	Acacia Private
			None	<input type="checkbox"/>	3616	3 May 2011	Nurse, Mary	Smith	Acacia Private
			None	<input type="checkbox"/>	3603	18 Feb 2011	Nurse, Mary	Smith	Acacia Private
			None	<input checked="" type="checkbox"/>	3845	15 Oct 2011	Nurse, Mary	Smith	Acacia Private
			None	<input type="checkbox"/>	3581	31 Mar 2011	Nurse, Mary	Smith	Acacia Private

Note: When a record is deleted the original reporter will still be able to see the Incident record in their **Review My -> Incidents** (Entered Incidents) list.

Entered									
Select a record to display the available tools.									
Shows Incidents entered by you or									
Drag a column header here to group by that column									
		Archived		Dist		ID	Notification Date	Reporters Name	
				1	<input type="checkbox"/>	3697	7 Jan 2013	Default User	
				None	<input type="checkbox"/>	3695	14 Nov 2012	System Manager	
				None	<input type="checkbox"/>	3674	1 Aug 2012	Faulkner, Laura	
		Yes		1	<input type="checkbox"/>	3672	1 Aug 2012	Hayden, Anne	
				None	<input type="checkbox"/>	3671	1 Aug 2012	Nicolaidis, Christine	
				None	<input type="checkbox"/>	3667	1 Aug 2012	Nicolaidis, Christine	
		Yes		None	<input type="checkbox"/>	3635	6 Feb 2012	Default User	
				None	<input type="checkbox"/>	3617	21 May 2011	Nurse, Mary	
				None	<input type="checkbox"/>	3845	3 May 2011	Nurse, Mary	
				None	<input type="checkbox"/>	3615	30 Apr 2011	Nurse, Mary	
				None	<input type="checkbox"/>	3584	21 Apr 2011	Nurse, Mary	

When a posted record that was deleted is restored the Date Entered field is updated

When a record is restored, the record virtual date is now updated to reflect the date the record is shown in the Post Incidents List Page. The date the record was restored is shown in the Date Entered column of the List page.


Drag a column header here to group by that column								
			Dist		ID ▲	Incident Date ▼	Date Entered ▼	Reporters Name ▼
					3823 ▼			
		None			3823	9 Jan 2019	15 Mar 2021	System Manager
1 Records Found (Page 1 of 1)								

The Control Panel for the record shows the user who edited the record, in addition to the date and time. The Review History shows who undeleted the record. Once undeleted, the Alert system will recognise the record because the date entered has been reset to the date record was restored.

Control Panel	
Version Control	
Part 2 of 2 of a multi-edit report, the current version.	
Last edited by: System Manager (Manager) on 15 Mar 2021 12:00:01	
Unposted edit by: System Manager (Manager) on 15 Mar 2021 12:00:01	
Actions	
Bookmark	Archive
Alert Me!	Change History
Dist. List	

Archive

Incident records that are entered by users will appear in their **Entered Incidents** list. There may be times when a user does not want to see all of the incidents in their **Entered Incidents** list view. For example, when a user has completed all their required work in a record or when the record has been marked as deleted in the **Incidents for Review** or **Posted Incidents** lists. To **Archive** a record do the following:

- 1 Select the record** - From the Entered Incidents List select the record that you want to Archive by clicking on the check box in the Selection State column.
- 2 Archive the record** - Click on the Archive icon  in the Selection State Menu.

Entered Incidents									
Shows Incidents entered by you or anyone reporting to you, d									
						5			
				None		3667	1 Aug 2012	Nicolaidis, Christine	McTest
		Yes		None		3635	6 Feb 2012	Default User	Smith
				None		3617	21 May 2011	Nurse, Mary	Smith
				None		3615	30 Apr 2011	Nurse, Mary	Smith
				None		3584	21 Apr 2011	Nurse, Mary	Smith
				None		3533	28 Jul 2012	Brooks, Jason	Esler
		Yes		None		3516	14 May 2012	Nurse, Mary	Smith
		Yes		None		3510	15 Apr 2012	Nurse, Mary	Smith

- 3 **Confirmation** – A confirmation message will be displayed under the Entered Incidents page title.

Entered Incidents	
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.	
Archived status for item(s) 3845 has been set.	

Restore an Archived Record

Once a record has been Archived from your Entered Incidents page under the My Workspace menu you will no longer see the record in the Entered Incidents page.

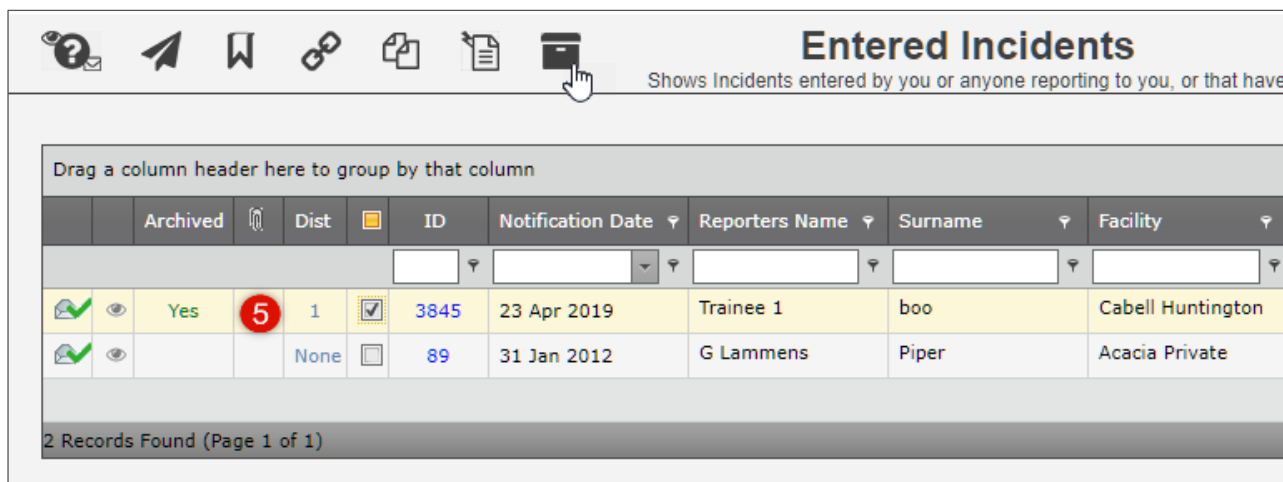
- 1 To restore the archived record, go to the **Entered Incidents** list.

- 2 Open **Selection Settings** – Click on the cog  icon to open the Selection Settings window

- 3 **Showed Archived** – Tick the checkbox next to Show Archived

- 4 Then click on the **Apply Settings** button

- 5 **Archives Status** – The record you have recovered from the Archive will now be visible in your **Entered Incidents** list



Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have

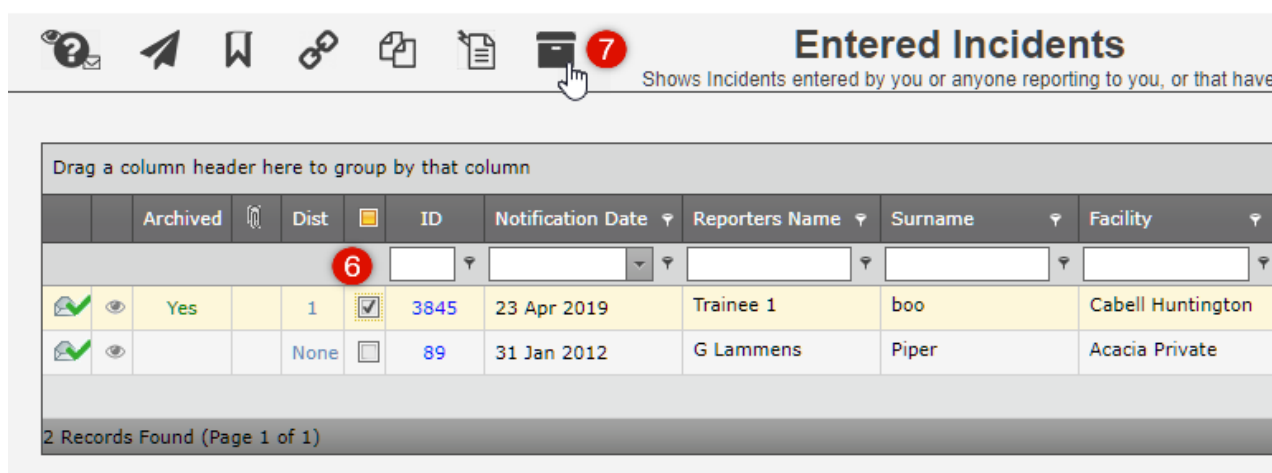
Drag a column header here to group by that column

	Archived	Dist	ID	Notification Date	Reporters Name	Surname	Facility
	Yes	1	3845	23 Apr 2019	Trainee 1	boo	Cabell Huntington
		None	89	31 Jan 2012	G Lammens	Piper	Acacia Private

2 Records Found (Page 1 of 1)

- 6 **Select the record** – Put a tick in the checkbox to select the record that you want to recover

- 7 **Remove from Archive** – Click on the Archive icon in the selection state menu



Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have

Drag a column header here to group by that column

	Archived	Dist	ID	Notification Date	Reporters Name	Surname	Facility
	Yes	1	3845	23 Apr 2019	Trainee 1	boo	Cabell Huntington
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2 Records Found (Page 1 of 1)

- 8 **Confirmation** – A confirmation message will be displayed under the **Entered Incidents** page title informing you that the archived record has been restored. The record you have recovered from the Archive will now be visible in your **Entered Incidents** list

Entered Incidents
Shows Incidents entered by you or anyone reporting to you, or that have been 'Distributed' to you.

Archived status for item(s) 3845 has been removed.