### **Introduction**

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

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

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

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

|              | Incident Qua                   | ality Activity 🔰 Risk 🔰 Feedba | :K   |
|--------------|--------------------------------|--------------------------------|--|
|              |                                | User Profile                   | s (General)                                  |
| elect User:  |                                | •                              | User Registry Save User New User Delete User |
| User Name I  | Only displaying first 500 user | • 0                            | Rebuild 'Select User' List Now               |
| Dishina Har  | r Type Filteri                 | Only Show Expired              | Usersi                                       |
|              |                                | Only Show Deleter              | Usersi                                       |
| User Positio | n Filteri                      |                                |  |
| User Positio | n Filteri<br>d After Date:     | 0                              | xpired Users in Search:                      |

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

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

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

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

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

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

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

### Clients who have a User Licence

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

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



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

### How do I create a New User?

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

In this guide, it will be assumed

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

### Creating a User

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

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

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

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

### General tab

The General User Profiles only contains the

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

| General  | Incident                              | Quality  | ACCIVICY               | Risk              | Feedback   |               |
|--|---------------------------------------|--|------------------------|-------------------|--|---------------|
| -  |                                       | User Prot  | files (General)        |                   | 3 1  |               |
| Select User: New User<br>34 Users  | v<br>found.                           |  | User Regi              | stry Save         | User New User D  | elete User    |
| User Name Filter:  |                                       |  | Rebuild 'Select U      | ser' List Now     |  |               |
| RiskMan User Type Filter:  |                                       | ✓ ○  | Only Show Expired User | -51               |  |               |
| User Position Filter   |                                       | V (  | Only Show Deleted User |                   |  |               |
| User Created After Date:   |                                       | 10   | Include Deleted/Expire | d Users in Search |  |               |
| User Has Facility Restriction:   |                                       | <b>~</b>   | Exclude Deleted/Expire | d Users from sear | schu   |               |
| Login Details  | 2                                     |  |                        |                   |  |               |
| User Display Name:   |                                       |  |                        | er's position is: |  | v             |
| User Name:   |                                       |  | This user's RiskHa     | an User Type is:  | Reapply the above template per   | N number land |
| Do you want to change Passwo   |                                       |  |                        |                   | Reapply the above template per   | missions      |
| Password Never Expires:  | Last Changed: Nev                     | wr.  |                        |                   |  |               |
| Password Never Expires:<br>Force Change Password:  |                                       |  |                        |                   |  |               |
| Email Address:   | -                                     |  | Alternate              | Email Address:    |  |               |
| Phone Number:  |                                       |  | ] '                    | Hobile Number:    |  |               |
| Profile Duration:  | O Expires On                          |  |                        | Start Page:       | Incident Entry 👍 💌   |               |
|  | Never Expires                         |  |                        |                   | · ·  |               |
| Current/Pending Delegation   |                                       |  |                        |                   |  |               |
| Edit Delegation  |                                       |  |                        |                   |  |               |
| Has Delegated Authority To Da  | te To Start Dat                       |  | as a Delegate for      |                   | Date To Start Date To  | End           |
| Not Delegated  |                                       | Not A Dele   | gate                   |                   |  |               |
| Restriction Details  | 5 (All restrictions                   | s in this section are shared betwe   | en all modules.)       |                   |  |               |
| No Restrictions in this area have an   | w selected Zema                       |  |                        |                   |  | (1            |
|  |                                       |  |                        |                   |  |               |
|  |                                       |  |                        |                   |  |               |
| Entry/Update Restrictions  | acility Restriction:                  |  | Locat                  | tion Restriction: |  |               |
| F  | acility Restrictions                  |  | Local                  | tion Restriction: |  |               |
| Cabell Huntington<br>Acadia Private  | acility Restriction:                  |  | Local                  | tion Restriction: |  |               |
| Cabell Huntington<br>Acada Private<br>Eucalystus Lodge   | acility Restriction:                  |  | Local                  | tion Restriction: |  |               |
| Cabell Huntington<br>Acadia Private  | acility Restriction:                  |  | Local                  | tion Restriction: |  |               |
| Cabell Huntington<br>Acada Private<br>Eucalystus Lodge   | acility Restriction:                  |  | Leaf                   | tion Restriction: |  |               |
| Cabell Huntington<br>Acada Private<br>Eucalystus Lodge   | acility Restriction:                  |  |                        | tion Restriction: |  |               |
| Cabell Huntington<br>Acada Private<br>Eucalystes Lodge   | acility Restriction:                  |  |                        | tion Restriction: |  |               |
| F<br>Cabul Huntington<br>Acadis Private<br>Watto Private<br>Watto Private  |                                       |  |                        |                   |  |               |
| F<br>Cabell Huntington<br>Accite Private<br>Eucolyster Lodge<br>Wattle Private   |                                       | Locat  |                        |                   |  |               |
| Resorting Restrictions<br>Resorting Restrictions<br>Cable Hystopics  |                                       | Locat  |                        |                   |  |               |
| Cabell Humitights     Cabell Humitights     Cabell Humitights     Excellent Humitights     Excellent Humitights     Reporting Restrictions     Facility Re     Cabell Antipion   |                                       | Lecat  |                        |                   |  |               |
| Cabell Hustington  |                                       | Locat  |                        |                   |  |               |
| Cabell Humph Cabel   |                                       | Locat  |                        |                   |  |               |
| Cabell Hustington  |                                       | Locat  |                        |                   |  |               |
| Cabil Hotpita<br>Cabil Hotpita<br>Ecolyptic Lodge<br>Wattle Private<br>Ecolyptic Lodge<br>Wattle Private<br>Cabil Hustington<br>Assis Private Gen<br>Traffic Friend Gen<br>Tr  |                                       |  | ion Restrictions       |                   |  |               |
| Calor Human<br>Acade Munipun<br>Acade Munipun<br>Acade Munipun<br>Water Provide<br>Reservices<br>Calor Human<br>Calor Human<br>Calor Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human<br>Human | striction                             |  | ion Restrictions       |                   |  |               |
| Cabell Humph Cabel   | striction                             |  | ion Restrictions       |                   | Serie Redritme   |               |
| Cadel surgium     Cadel surgium     Cadel surgium     Cadel surgium     Vate Prove     Vate Prove     Vate Prove     Cadel surgium   | suffiction:                           | Specia<br>Ande And Care Series   | on Restrictions        | Filer List        | d Care Services.   | ~             |
| Coder sections<br>Coder sections<br>Coder sections<br>water reads<br>water reads<br>water reads<br>Coder sections<br>Coder sections  | suffiction:                           | Specia<br>Acute Aped Care Service<br>Array, Immunology &   | on Restrictions        | Filter List       | d Care Services.<br>d Psychiatry Services.<br>d Health   | ^             |
| County of the second seco  | suffiction:                           | Specia<br>Acute Aped Care Servic<br>Alergy, Immunology 6<br>Alegis development   | on Restrictions        | Filter List       | d Care Services.<br>d Psychiatry Services.<br>d Health<br>tomical Pathology  |               |
| A card section of the sector o   | nstriction:<br>Restriction:<br>voices | Specie<br>Actors Aged Care S<br>Actors Jonation S<br>Actors Jonation S<br>Actors Actors | on Restrictions        | Pitter List       | d Care Services.<br>d Psychiatry Services.<br>ad Health<br>tomical Pathology<br>medical Engineering<br>diovascular & Respiratory Directorate | ~             |
| Cadel scripting<br>cadel scripting<br>water house<br>water house<br>water house<br>Reservices<br>Cadel screening<br>Reservices<br>Cadel screening<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices<br>Reservices  | nstriction:<br>Restriction:<br>voices | Specia<br>Acide Aged Carlos<br>Alestyn, formansigy &<br>AlestMetics<br>835<br>835  | In Restrictions        | Filter List       | d Care Services.<br>d Psychiatry Services.<br>d Health<br>tomical Pathology  |               |

- 2. Enter the user's details in the Login Details 2 section
  - Username: Suggest using the same naming conventions as your network logins
  - Password: Your Administrator has the ability to set the complexity and expiration of passwords used for RiskMan Standard accounts if desired. The settings can be modified via *Configuration > Global Settings > Users > Password Management*. Please refer to the Global Settings Descriptions Document for a detailed explanation for configuring password complexity rules. Below is some additional information about RiskMan passwords:
  - You can opt for passwords never to expire in a User Profile. This will override any password expiration setting you have enabled in the Global Settings:

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

| User Display Name:    | System Manager                             |
|-----------------------|--|
| User Name:            | Manager                                    |
| Password:             | •••••••<br>Last Changed: 28 Feb 2014 12:06 |
| Password Never Expire | 25   |

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

| Login Details                  |                    |
|--------------------------------|--------------------|
| User Display Name:             | Lauren             |
| User Name:                     | Lauren             |
|                                |                    |
| Do you want to change Password | l: 🗌 Last Changed: |
| Password Never Expires:        | $\checkmark$       |
| Force Change Password:         | $\checkmark$       |

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

- Users can change their password if they want. However, if a user wants to change their password they cannot use any of their last 12 passwords. This change is not controlled by any settings and will be applied automatically.
- It is possible to add to the ability to prevent users from changing their password too frequently. When enabled, users will only be able to change their passwords once a day. This prevents users, when forced to change their password, from imediately changing it back. This is controlled by Global Settings (See Global Settings guide).
- It is possible to lock out users who enter the wrong username and password combination successive times. The number of times they can enter the wrong combination before lock-out is defined in Global Settings (See Global Settings guide).
- Email Address: It is advisable that all managers have an email address registered with their User Profile so they can receive email notifications from RiskMan
- This user's RiskMan User Type is ②: Select the template the user will be assigned to. This is used as a reference when templates are updated and changes are applied to all users on that template

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

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

### To view the Location restrictions

- Click on the **Filter List** button **1** under the Location Restriction box
- In the pop-up window, select the Site 2 and press the Filter list 3 button
- The list of Locations will populate into the **Restriction Details 4** section
- Highlight as required (Hold CTRL key if you wish to select more than one Location)

| ry/Update Restrictions   |   |
|--|---|
| Facility Restriction:  | Location Restriction:                                       |
| Cabell Huntington<br>Acada Private<br>Eucalputus Lodge<br>Wattle Private | Filer list  |
| Filter Facility List   |   |
| Hospital   | 0   |
| Facility   | 8   |
|  | Filter List   |
| striction Details (All re  | strictions in this section are shared between all modules.) |
| Restrictions in this area have any sele                                  | cted items.   |
| v/Update Restrictions<br>Facility Restriction:                           | Location Restriction:                                       |
| Cabell Huntington  | AC1<br>AC2<br>AC3 (1)                                       |

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

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

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

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

4. To save the user, press Save User 6

### Assign a Register Specific Template for the New User

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

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

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

### Incident tab

•

Click on the Incident tab 

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

|  |   |                                  |                                    | _                            |                         |                         |
|--|---|----------------------------------|------------------------------------|------------------------------|-------------------------|-------------------------|
| General  | Incide  | ent 🛛 Qu                         | ality Activit                      | y F                          | Risk                    | Feedback                |
|  |   | User P                           | ofiles (Incident)                  |                              |                         |                         |
| Select Users New User  | ×   |                                  |                                    | 6                            |                         |                         |
| 34 0   | ers found.  |                                  | User Registry                      | y Save L                     | lear New                | Delete User             |
|  |   |                                  |                                    |                              |                         |                         |
| User Name Filters  |   |                                  | Rebaild 'Select User               |                              |                         |                         |
| RiskMan User Type Filters  |   | ~                                | Only Show Users with no pr         | ormissions in thi            | is register:            |                         |
| User Position Filter:  |   | ~                                |                                    |                              |                         |                         |
| User Created After Date:   |   |                                  | O Include users with no Perm       |                              | h:                      |                         |
| User Has Facility Restrictio   | **  | ~]                               | Only show active users in s        | earchi                       |                         |                         |
| Login Details  |   |                                  |                                    |                              |                         |                         |
| User Display Name:   |   |                                  | This user's                        | position is:                 |                         | V                       |
| User Name:   |   |                                  | This user's RiskHan U              | Joor Type is: D              | staat 🙆                 | V                       |
|  |   |                                  |                                    |                              |                         | we template permissions |
| Do you want to change Pas  | errord: 🗌 Last Changed: Nev   |                                  |                                    |                              |                         |                         |
| Password Never Expires   |   |                                  |                                    |                              |                         |                         |
| Force Change Password:   |   |                                  |                                    |                              |                         |                         |
| Email Address:   | _   |                                  | Alternate Em                       | ail Address:                 |                         |                         |
| Phone Number:  |   |                                  |                                    | ale Number:                  |                         |                         |
| Profile Duration:  | C Expires On  |                                  |                                    | Start Page: In               | ukdent Entry 🙆          |                         |
|  | Rever Expires   |                                  |                                    |                              |                         |                         |
| Current/Pending Delegatio  |   |                                  |                                    |                              |                         |                         |
| Current/Pending Delegatio  | ,   |                                  |                                    |                              |                         |                         |
| Edit Delegation  |   |                                  |                                    |                              |                         |                         |
| Han Delegated Authority To<br>Not Delegated  | Unite 16 Staff. Da  | te To End Is ac                  | ting as a Delegate for<br>Delegate |                              | Date To Start           | Date To End             |
| Restriction Details  | (All restriction  | is in this section are shared b  |                                    |                              |                         |                         |
| tio Restrictions in this area has  | and advantage from the  |                                  |                                    |                              |                         | (\$)                    |
|  | and an an an a  |                                  |                                    |                              |                         | ۲                       |
| Specific Restrictions  | 5 (Restrictions i   | n this section are specific to I | he register.)                      |                              |                         |                         |
| Entry/Update Restrictions  | •   |                                  |                                    |                              |                         |                         |
| Show only "Alerted" In   |   |                                  |                                    |                              |                         |                         |
| Show only "Alerted" In   | cident items in Inbox. 🤎<br>Incident Involved Restric   | tion:                            |                                    |                              |                         |                         |
|  |   |                                  |                                    |                              |                         |                         |
| Patient<br>Chair M   | Client  |                                  |                                    |                              |                         |                         |
| Volunts  | *1  |                                  |                                    |                              |                         |                         |
| Relativ<br>Proget  |   |                                  |                                    |                              |                         |                         |
| Enviror<br>Equipm  | mental  |                                  |                                    |                              |                         |                         |
| Seteros<br>Non-Pe  |   |                                  |                                    |                              |                         |                         |
|  | 103   |                                  |                                    |                              |                         |                         |
| Reporting Restrictions   |   |                                  |                                    |                              |                         |                         |
| Show only "Alerted" In   | cident items in Reports. 🥝  |                                  |                                    |                              |                         |                         |
|  | Incident Involved Restric   | tion                             |                                    |                              |                         |                         |
|  |   |                                  |                                    |                              |                         |                         |
| Client   | Client  | ^                                |                                    |                              |                         |                         |
|  |   |                                  |                                    |                              |                         |                         |
|  |   |                                  |                                    |                              |                         |                         |
| Staff M<br>Volume  | er  |                                  |                                    |                              |                         |                         |
| Volunti<br>Relativ<br>Environ  | mental  |                                  |                                    |                              |                         |                         |
| Volunte<br>Relativ   | mental  | ~                                |                                    |                              |                         |                         |
| Volanti<br>Relativ<br>Environ  | mental<br>ent<br>nition   | ~                                |                                    | Restrict to                  | these humal Type        | a                       |
| Volanti<br>Relativ<br>Environ  | mental  | ¥                                | _                                  | Restrict to                  | these Journal Type      | 54                      |
| Volumb<br>Reistiv<br>En vires<br>Equipm<br>Interve   | mental<br>ant<br>Restrict to these Repor  | tsi                              |                                    | Restrict to                  | these Journal Type      | 54                      |
| Volumi<br>Belativ<br>Bruken<br>Reven<br>Beterer<br>AAAA  | reactal<br>ent<br>Restrict to these Repor<br>EST<br>xio Analysis<br>xio Analysis  |                                  | Colore<br>Tank                     | ral Comments                 | these Journal Type      |                         |
| Volumi<br>Robiti<br>Environ<br>Equipm<br>Intervi<br>Ange Gr<br>Age Gr  | metal<br>et<br>at<br>Restrict to these Report<br>SET<br>xip Analysis<br>xip Analysis by Facility<br>technic technic                               | ^                                | Actio                              | e al Commenta                | these Journal Type      |                         |
| Volume<br>Relativ<br>Enumera<br>Equipme<br>Interver<br>Interver<br>AAAA 1<br>Age Gr<br>Age Col<br>Add By<br>Add By   | neetal<br>at<br>Restrict to these Repor<br>EST<br>NO Analysis<br>yoo Analysis by Facility<br>facilists Stocked<br>o Report                        | ^                                | Actor                              | r al Communita<br>en Tarlane |                         |                         |
| Volume<br>Relativ<br>Enumera<br>Faujare<br>Interva<br>Interva<br>AAAA 1<br>Age Gr<br>Age Cr<br>Add By<br>Add State   | neetal<br>et<br>Restrict to these Report<br>SOT<br>NIO Analysis<br>Sup Analysis by Facility<br>Instant Involved<br>a Report<br>W<br>V<br>S Laward | ^                                | Actor                              | r al Communita<br>en Tarlane |                         |                         |
| Volume<br>Relative<br>Environ<br>Relative<br>Relative<br>Relative<br>Relative<br>Add T<br>Add T | neetal<br>et<br>Restrict to these Report<br>SOT<br>NIO Analysis<br>Sup Analysis by Facility<br>Instant Involved<br>a Report<br>W<br>V<br>S Laward | ^                                | Actor                              | e al Commenta                |                         |                         |
| Volume<br>Relative<br>Environ<br>Relative<br>Relative<br>Relative<br>Relative<br>Adve<br>Adve<br>Adve<br>Adve<br>Adve<br>Adve<br>Adve<br>Ad  | neetal<br>et<br>Restrict to these Report<br>SOT<br>NIO Analysis<br>Sup Analysis by Facility<br>Instant Involved<br>a Report<br>W<br>V<br>S Laward | ^                                | Actor                              | r al Communita<br>en Tarlane |                         |                         |
| Volume<br>Relativ<br>Enutras<br>Equipm<br>Interva<br>Interva<br>AAAA 1<br>Age Gr<br>Age Cr<br>Add By<br>Add Set<br>Add By<br>Add Set   | neetal<br>et<br>Restrict to these Report<br>SOT<br>NIO Analysis<br>Sup Analysis by Facility<br>Instant Involved<br>a Report<br>W<br>V<br>S Laward | ^                                | Actor                              | r al Communita<br>en Tarlane | n<br>endations<br>meant |                         |

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

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

- Start Page S: If this was selected under the General tab it will also display here. If not, you can select a start page from this list.
- Restriction Details (4): If the user does not have any Restriction Details then this section will be collapsed.
  - To expose the Restriction Details section click on the section.

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

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

¥

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

| try/Update Restrictions<br>Facility Restriction:     | Location Restriction:  |   |
|--|--|---|
| Cabell Huntington                                    |  |   |
| Acacia Private<br>Eucelyptus Lodge<br>Wattle Private |  |   |
|  | Filter List  |   |
| porting Restrictions                                 |  |   |
| Facility Restriction:                                | Location Restriction:  |   |
| Cabell Huntington                                    |  |   |
| Acadia Private                                       |  |   |
|  | Filter List  |   |
| Aggregate Restriction:                               | Specialty Restriction  | Service Restriction:  |
| Administrative Services                              | Acute Aged Care Service (E)<br>Allergy, Immunology & Respirat<br>Anaesthetics<br>865 | Aged Care Services. A<br>Aged Psychiatry Services.<br>Allied Health<br>Anatomical Pathology * |

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

### Feedback Tab

Click on the Feedback tab 

 and the newly created user will be displayed

| General   | Incid  | ont Ou  | ality Act              | ivity Risk  | Feedback                      |                    |
|---|--|---|------------------------|---|-------------------------------|--------------------|
| General   | Inclu  | ent Qu  | ality Act              |   | reeuback                      |                    |
|   |  |   | User Pro               | files (Feedback)  | 4                             |                    |
| Select User: New Use  | 240 Users fou  | w.  |                        | User Registry   | Save User New User            | Delete User        |
| User Name Filter:   |  |   |                        | Rebuild 'Select User' Li  | ist Now                       |                    |
| RiskNan User Type Filt  | eri  |   |                        | <ul> <li>Only Show Users with no perm</li> </ul>  | sissions in this register:    |                    |
| User Position Filter:   |  |   | 8                      | <ul> <li>Image: A set of the set of the</li></ul> |                               |                    |
| User Created After Dat  | e1   |   |                        | <ul> <li>Include users with no Permiss</li> </ul>   | ions in Search                |                    |
| User Has Organisation   | Restriction:   |   |                        | Only show active users in sear  | rchi                          |                    |
| Login Details   |  | ]   |                        |   |                               |                    |
| User Display Name:  |  |   |                        | This user's position is   |                               | [                  |
| User Namei  |  |   |                        | This user's RiskMan User Type is  | Default (2)                   |                    |
|   |  |   |                        |   | Reapply the above templa      | te permissions     |
| Do you want to change   | Password: 🗌 Last   | Changed: Never  |                        |   |                               |                    |
| Password Never Expire   |  |   |                        |   |                               |                    |
| Force Change Passwor  | d: 🗌   |   |                        |   |                               |                    |
| Email Address:  |  |   |                        | Alternate Email Address   |                               |                    |
| Phone Number:   |  |   |                        | Mobile Number   |                               |                    |
| Profile Duration:   | O Expi   |   |                        | Start Page  | Incident Entry                |                    |
|   |  |   |                        |   |                               |                    |
| Current/Pending Deleg   |  | er Expires  |                        |   |                               |                    |
| Current/Pending Deleg<br>Edit Delegation<br>Has Delegated Author?   | ation  | ]   | I Is actin             | g as a Delegate for   | Date To Start D               | late To End        |
|   | ation  | pate To End   | I Is actin<br>Not A De | q as a Delegate for   | Date To Start                 | late To End        |
| Edit Delegation<br>Has Delegated Authori  | ation  | ]   | Not A De               | alegate   | Date To Start E               | late To End        |
| Edit Delegation<br>Has Delegated Author?<br>Not Delegated   | ation<br>ty To Date To Start   | Date To End   | Not A De               | alegate   | Date To Start C               | late To End        |
| Edit Delogation<br>Has Delegated Author?<br>Not Delegated<br>Restriction Details<br>No Restrictions in this area ha   | ation<br>ty To Date To Start   | Date To End   | Not A De               | hispata<br>I modules.)  | Date To Start G               | late <u>To End</u> |
| Edit Delegation<br>Has Delegated Authori<br>Not Delegated<br>Restriction Details  | ation<br>ty To Date To Start<br>res any selected Berns.  | Date To End<br>(All restrictions in this section  | Not A De               | hispata<br>I modules.)  | Date_To_Start C               | iata To End        |
| Edit Delegation<br>Has Delegated Authori<br>Not Delegated<br>Restriction Details<br>No Restrictions in this area ha<br>Specific Restrictions  | ation<br>ty To Date To Start<br>re ary selected terns.<br>3<br>019<br>1 <sup>9</sup> Feedback items in   | Date To End<br>(All restrictions in this sector<br>(Restrictions in this sector   | Not A De               | hispata<br>I modules.)  | Data Ta Start G               | late To End        |
| Edit Delegation<br>Has Delegated Authori<br>Ni Delegated<br>Restriction Details<br>No Restriction s this area to<br>Specific Restrictions<br>Entry/Update Restriction<br>Dishow only "Alerter | ation<br>ty To Date To Start<br>re ary selected terns.<br>3<br>019<br>1 <sup>9</sup> Feedback items in   | Date To End<br>(All restrictions in this section<br>(Restructions in this section<br>Index.   | Not A De               | hispata<br>I modules.)  | Data. To. Start E             | late To End        |
| Edit Delegation<br>Has Delegated Authori<br>Ni Delegated<br>Restriction Details<br>No Restriction s this area to<br>Specific Restrictions<br>Entry/Update Restriction<br>Dishow only "Alerter | ation ty To Date To Start ty To Date To Start ore any selected items 3 3 1 1 F Feedback items in Type of Fee Complement Upgetion   | Date To End<br>(All restrictions in this section<br>(Restructions in this section<br>Index.   | Not A De               | rigota<br>(mobiles)   | Data To Start E               | lats To End        |
| Edit Delegation Has Delegated Authori No Plenated Authori Statution Restriction Details Specific Restrictions Entry/Undex Restriction Entry/Undex Restriction Show only "Alertee              | ation ty To Date To Start ty To Date To Start ore any selected items 3 3 1 1 F Feedback items in Type of Fee Complement Upgetion   | Date To End<br>(All restrictions in the section<br>(Internations in the section<br>Internet.<br>States:<br>to these Reports:<br>ted Ricks | Not A De               | rigota<br>(mobiles)   | trict To these Journal Types: | late To End        |
| Edit Delegation Has Delegated Authori No Plenated Authori Statution Restriction Details Specific Restrictions Entry/Undex Restriction Entry/Undex Restriction Show only "Alertee              | ation INTE Gote To Start INTE Gote To Start INTERIOR INTE | Date To End<br>(All restrictions in the section<br>(Internations in the section<br>Internet.<br>States:<br>to these Reports:<br>ted Ricks | Not A D                | ripote<br>rimolulo:)<br>r)<br>Res<br>Corresponde  | trict To these Journal Types: | ada To End         |
| Edit Dolegation Has Dolegation Has Dolegated Kasterion Details Restriction Details Sto Restrictions Entry/Undets Restriction Entry/Undets Restriction   | ation INTE Gote To Start INTE Gote To Start INTERIOR INTE | Date To End<br>(All restrictions in the section<br>(Internations in the section<br>Internet.<br>States:<br>to these Reports:<br>ted Ricks | Not A D                | ripote<br>rimolulo:)<br>r)<br>Res<br>Corresponde  | trict To these Journal Types: | ]                  |
| Edit Dolegation Has Dolegation Has Dolegated Kasterion Details Restriction Details Sto Restrictions Entry/Undets Restriction Entry/Undets Restriction   | ation INTE Gote To Start INTE Gote To Start INTERIOR INTE | Date To End<br>(All restrictions in the section<br>(Internations in the section<br>Internet.<br>States:<br>to these Reports:<br>ted Ricks | Not A D                | ripote<br>rimolulo:)<br>r)<br>Res<br>Corresponde  | trict to these Journal Types: | ]                  |

- Assign the appropriate Feedback Template in the Login Details section ② (refer to the description under the Incident Tab)
- Restriction Details 
   In this version, there is no Specific Restrictions section. The Site & Location Entry/Update or Reporting restrictions will be carried across from all other Registers. In addition, on the Feedback User Profile, the following restrictions can be included
  - Show Only "Alerted" Feedback in Inbox: This
    option should only be checked if the user has
    access to the Feedback Inbox (e.g. Risk/Quality
    Manager, Consumer Advocate) and should only
    see feedback they have been alerted to
  - Show Only "Alerted" Feedback in Reports: This option should only be checked if the user has access to the Feedback Reports (e.g. Consumer Advocate, Risk/Quality Manager, Executives, Managers) and can only report on feedback they have been alerted to
- 4. To save the user, press Save User ④

### **CREDATIX** RISKMAN REFERENCE GUIDE TO USER MANAGEMENT (Non-Network Logins)

### <u>Risk Tab</u>

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

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



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

| General In  | icident Q   | uality Activ                    | ity <b>Ris</b> k                             | Feed  | lback                   |                       |
|---|---|---------------------------------|--|---|-------------------------|-----------------------|
|   |   | User                            | Profiles (Risk)                              |   | 7                       |                       |
| Select User: New User<br>29 Users 6                                 | v<br>iound.   |                                 | User   | legistry Sav  | re User New User        | Delete User           |
| User Name Filter:   |   |                                 | Rebuild 'Sele                                | ct User' List Now   |                         |                       |
| RiskMan User Type Filter:   |   | ~                               | Only Show Users wit                          | h no permissions in   | this register:          |                       |
| User Position Filter:   |   | ~                               |  |   |                         |                       |
| User Created After Date:<br>User Has Facility Restriction:          |   |                                 | Include users with r     Only show active us |   | arch:                   |                       |
|   |   | • )                             | Comy show active us                          | in search:  |                         |                       |
| Login Details   |   |                                 |  |   |                         |                       |
| User Display Name:  |   |                                 |  | s user's position is:   |                         | Y                     |
| User Name:  |   |                                 | This user's Ris                              | kHan User Type is:  |                         | emplate permissions   |
| Do you want to change Passwor                                       | rd: 🗌 i ant Channach Nam  | _                               |  |   | Reapply the above to    | emplate permissions   |
| Password Never Expires:   | Last Changed: Neve  |                                 |  |   |                         |                       |
| Force Change Password:  |   |                                 |  |   |                         |                       |
| Email Address:  |   |                                 | Alter  | ate Email Address:  |                         |                       |
| Phone Number:   |   |                                 |  | Nobile Number:  |                         |                       |
| Profile Duration:   | C Expires On  |                                 |  | Start Page:   | Incident Entry          |                       |
|   | Never Expires   |                                 |  |   |                         |                       |
| Current/Pending Delegation  |   |                                 |  |   |                         |                       |
| Edit Delegation<br>Has Delegated Authority To Date<br>Not Delegated | e To Start Dat  | e To End Is act                 | ing as a Delegate for<br>Delegate            |   | Date To Start           | Date To End           |
|   |   |                                 |  |   |                         |                       |
| Restriction Details   | (All restrictions   | in this section are shared be   | tween all modules.)                          |   |                         |                       |
| No Restrictions in this area have any                               | y selected items.   |                                 |  |   |                         |                       |
| Specific Restrictions 6   | (Restrictions in  | this section are specific to th | e register.)                                 |   |                         |                       |
| Entry/Update Restrictions   |   |                                 |  |   |                         |                       |
| Show only "Alerted" Risk ite  | ems in Inbox. 🕝<br>Type Of Risk Restriction:  |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
| Operational<br>Strategic<br>Provisional                             |   |                                 |  |   |                         |                       |
| Provisional<br>Project Risk   |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
| Reporting Restrictions  | 0   |                                 |  |   |                         |                       |
| Show only "Alerted" Risk its  | ems in Reports. 🥑<br>Type Of Risk Restriction:  |                                 |  |   |                         |                       |
|   | Type of Risk Restriction:   |                                 |  |   |                         |                       |
| Operational   |   |                                 |  |   |                         |                       |
| Strategic<br>Provisional<br>Project Risk                            |   |                                 |  |   |                         |                       |
| Project Risk  |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         |                       |
|   | Restrict to these Reports:  |                                 |  | Restrict  | to these Journal Types: |                       |
| (Sub-Report)  | Actions A4L   | ~                               |  | General Comments  |                         |                       |
| (Sub-Report)<br>(Sub-Report)  | Actions A4L<br>Actions A4P<br>Associated Incidents A4L<br>Associated Incidents A4P<br>Catalyst A4P<br>Catalysts A4L<br>Compensate A4L |                                 |  | Task<br>Legals<br>Discussion With Insu                        |                         |                       |
| (Sub-Report)<br>(Sub-Report)  | Associated Incidents A4P<br>Catalyst A4P  |                                 |  | Discussion With Insu<br>Correspondence Sent<br>Control Review | rer<br>t                |                       |
| (Sub-Report)<br>(Sub-Report)  | Catalysts A4L<br>Consequences A4L   |                                 |  | Control Review<br>Risk Review                                 |                         |                       |
| (Sub-Report)<br>(Sub-Report)  | Consequences A4L<br>Consequences A4P<br>Controls A4L  | ~                               |  |   |                         |                       |
| A Details   |   |                                 |  |   |                         |                       |
|   |   |                                 |  |   |                         | Internation of F      |
| AID Before Higration  | nt Display 🗸  |                                 |  |   |                         | Hide Details Section: |
| 10 before Nigration   |   |                                 |  |   |                         |                       |

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

### How do I modify an existing user?

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

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

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

## Modifications that need to be done under the specific Register tab

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

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

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

### Searching for a User



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

- 1. Select the user from the Select User **1** list or
- 2. Enter filter criteria in **one** of the filter fields **2** 
  - Press "Rebuild 'Select User' List Now" 8
  - Select the user from the Select User 0 list

### Modifications: Template Changes & Specific Restrictions

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

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

- 3. Modify the Specific Restrictions <sup>(6)</sup> as required
- 4. Press Save User 4

•

|  |  | U   |                             |                        |                            |   |                 |                  |                   |      |
|--|--|---|-----------------------------|------------------------|----------------------------|---|-----------------|------------------|-------------------|------|
| Genera   | III  | ncide   | nt Qu                       | ality                  | Activity                   | Risk                                    | Fee             | edback           |                   |      |
|  |  |   | Us                          | er Pro                 | files (Incident            | :)                                      | 4               |                  |                   |      |
| Select Users New User                                    |  | ×   |                             |                        | User Re                    | oistry Sa                               | ve User         | New User         | Delete U          | loor |
|  | 34 Users four                                | d.  |                             |                        |                            |   |                 |                  |                   |      |
| User Name Filter:  |  |   |                             |                        | Rebuild 'Select            | User' List Now                          |                 |                  |                   |      |
| RiskMan User Type Fi                                     | ilters                                       |   |                             |                        | Only Show Users with       | no permissions in                       | h this register | ,                |                   |      |
| User Position Filter:                                    |  |   |                             | ×                      |                            |   |                 |                  |                   |      |
| User Created After Da                                    |  |   |                             |                        | Include users with no      |   | sarchi          |                  |                   |      |
| User Has Facility Resi                                   | triction:                                    |   |                             | × (                    | Only show active user      | s in search:                            |                 |                  |                   |      |
| Login Details  |  |   |                             |                        |                            |   |                 |                  |                   |      |
| User Display Name:                                       | [  |   |                             |                        | This                       | user's position is                      |                 |                  |                   | V    |
| Jaer Name:   | ĺ  |   |                             |                        | This user's Risk           | Man User Type is:                       | Default 2       |                  |                   | ~    |
|  |  |   |                             |                        |                            |   | Reap            | ply the above to | emplate permissio | ns   |
| Do you want to chang                                     |  |   | Never                       |                        |                            |   |                 |                  |                   |      |
| Password Never Expli                                     |  |   |                             |                        |                            |   |                 |                  |                   |      |
| force Change Passwo                                      | ordi ,                                       |   |                             |                        | -                          |   |                 |                  |                   |      |
| mail Address:<br>None Number:                            | 1  |   |                             |                        | Alterna                    | te Email Address<br>Nobile Number       |                 |                  |                   |      |
| None Numberi   | l  | 0   |                             |                        |                            |   |                 |                  |                   |      |
| Toma Duration  |  | <ul> <li>Expires On</li> <li>Never Expires</li> </ul> |                             |                        |                            | Start Page                              | Incident Entr   | ,                |                   |      |
|  |  | Never Expires   |                             |                        |                            |   |                 |                  |                   |      |
| wrrent/Pending Dele                                      | egation                                      |   |                             |                        |                            |   |                 |                  |                   |      |
| Edit Delegation<br>las Delegated Author<br>lot Delegated | rity To Date Tr                              | a Start   | Date To End                 | Is acting<br>Not A Del | as a Delegate for<br>egste |   | Date To         | Start            | Date To End       |      |
| lestriction Details                                      |  | (All restri   | ictions in this section are | shared betw            | een all modules.)          |   |                 |                  |                   |      |
| to Restrictions in this ar                               |  | and the second  |                             |                        |                            |   |                 |                  |                   | (9)  |
| o resolution in one ar                                   | tea have any se                              |   |                             |                        |                            |   |                 |                  |                   | ۲    |
| pacific Restrictions                                     | 3  | (Restrict)  | ons in this section are sp  | secific to the r       | egister.)                  |   |                 |                  |                   |      |
| Entry/Update Restric                                     | tions  |   |                             |                        |                            |   |                 |                  |                   |      |
| Show only "Alert   | ed" Incident if                              | ems in Inbox. 🤇                                       |                             |                        |                            |   |                 |                  |                   |      |
|  | Inc  | ident Involved Re                                     | striction                   |                        |                            |   |                 |                  |                   |      |
| Г  |  |   |                             |                        |                            |   |                 |                  |                   |      |
| 1  | Patient/Client<br>Staff Member               |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Volunteer<br>Relative/Visitor                |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Property<br>Environmental                    |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Equipment                                    |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Intervention<br>Non-Person                   |   |                             |                        |                            |   |                 |                  |                   |      |
| Reporting Restriction                                    |  |   |                             |                        |                            |   |                 |                  |                   |      |
|  | _  |   | 0                           |                        |                            |   |                 |                  |                   |      |
| Show only "Alerte  |  | ams in Raports.<br>ident Involved Re                  | striction:                  |                        |                            |   |                 |                  |                   |      |
| -  |  |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Client                                       |   | ~                           |                        |                            |   |                 |                  |                   |      |
| -  | Patient/Client                               |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Resident<br>Staff Member                     |   |                             |                        |                            |   |                 |                  |                   |      |
| ,  | Volunteer<br>Relative/Visitor                |   |                             |                        |                            |   |                 |                  |                   |      |
|  | Environmental<br>Equipment                   |   | <u> </u>                    |                        |                            |   |                 |                  |                   |      |
| 6  | Equipment<br>Intervention                    |   | Ť                           |                        |                            |   |                 |                  |                   |      |
|  |  | estrict to these R                                    | eports:                     |                        |                            | Restric                                 | t to these Jor  | irnal Types:     |                   |      |
| E  |  |   |                             |                        |                            |   |                 |                  |                   |      |
|  | AAAA TEST<br>Aga Group Anal                  | /sis  | ^                           |                        |                            | General Comment<br>Task                 |                 |                  | ^                 |      |
|  | Age Group Analy                              | isis by Facility                                      |                             |                        |                            | Action Taken                            |                 |                  |                   |      |
| l l  | AM By Incident<br>AM Data Export<br>AM Stuff |   |                             |                        |                            |   |                 |                  |                   |      |
| 1  | AM Stuff                                     |   |                             |                        |                            | Invoice Paid<br>Discussion With In      |                 |                  |                   |      |
| 8  | AM TEST<br>Andrew's Layout<br>Anna test      | :   | ~                           |                        |                            | Preventative Reco<br>Hospital Policy Am | mmendations     |                  | ~                 |      |
|  |  |   |                             |                        |                            | Investment Policy Att                   | e where         |                  |                   |      |
| Who Was Affected   |  |   |                             |                        |                            |   |                 |                  |                   |      |
| Lincident Involved                                       |  | equired 🗸   |                             |                        | Attedical Record           |   | quired 🗸        |                  |                   |      |
| format Manua   | Failer D                                     | equirad Y   |                             |                        | for an and a los           | Dont Dis                                | olav 🗸          |                  |                   |      |

Example: Modifying a User under the Incident Register User Profile

### Modifications: Login Details & Restriction Details

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

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

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

| User Profiles (General)  Seventses  Seventses Seventses Seventses  Seventses S   | General  | Incider                              | nt Qual                                 | ity Activity   | Ris                | k T Ee   | edback              |            |
|--|--|--------------------------------------|---|--|--------------------|--|---------------------|------------|
| het live in our  | General  | Incluci                              |   |  |                    | K IC   | CUDUCK              |            |
| Nutrie Data Randa     In Starren Marri     In Starren Marrin   |  |                                      | User P                                  | rofiles (General)  | ' (                | 4  |                     |            |
| the set of th  | lect User: New User<br>34 Users f  |                                      |   | User Ro  | gistry Sa          | ve User N  | lew User Del        | lete User  |
| er value faler in an and an an and an an and an an and an an and  | er Name Filter:  |                                      |   | Rebuild 'Select  | User' List Now     |  |                     |            |
| er oread fibre Obtie of Lipse Deserved. Lest Classing have a served and a served base of the served base of  | skHan User Type Filter:  |                                      | ~                                       | Only Show Expired Us   | ers:               |  |                     |            |
| en ins racht jedentenen in einen einen in einen ein   | er Position Filter:  |                                      | ¥                                       | Only Show Deleted Us   | ars:               |  |                     |            |
| ar flavini<br>ar fla | er Created After Date:   |                                      |   | O Include Deleted/Expir  | ed Users in Searc  | ha   |                     |            |
| The series' puttient is in the series's flagshing is an interest in the series is an a physical flagshing is an interest in the series is an a physical flagshing is an interest in the series is an a physical flagshing is an a physical flagsh   | er Has Facility Restriction:   |                                      | v)                                      | Exclude Deleted/Expire   | ed Users from se   | archi  |                     |            |
| er denami in the set of Kakhen bore "yees in [ Offen. ] Teaper area to charge Parsende Les Clasged Houre   | gin Details  |                                      |   |  |                    |  |                     |            |
| Interpretendence              Interpretendence  | er Display Name:   |                                      |   | This   | ser's position is: |  |                     |            |
| yey ward heter Spins and Yes Spin Spin Spin Spin Spin Spin Spin Spin   | er Namei   |                                      |   | This user's Riski  | tan User Type isi  | Default  |                     |            |
| accord Recipions:  |  |                                      |   |  |                    | Reapply the  | above template perm | issions    |
| roc Charge Provending   and Addressing   Addressing </td <td></td> <td></td> <td>ver</td> <td>0</td> <td></td> <td></td> <td></td> <td></td>   |  |                                      | ver                                     | 0  |                    |  |                     |            |
| and Address and Parket State S   |  |                                      |   |  |                    |  |                     |            |
| membra in the intervention of the interventinterventent of the intervention of the intervention of the interv  |  |                                      |   |  |                    |  |                     |            |
| ethe forestion: Expression Expression Expression: Expression Expression: Expre   |  |                                      |   | Alterna  |                    |  |                     |            |
| Prove Dayses       resultance       Colonged       Colonged    <  |  | C Excellent Cla                      |   |  |                    | Tecident Entry   |                     |            |
| read Hydroling Schulgstam<br>Schulder Jahr Karlow (2000)<br>Schulder Jahr Karl   |  |                                      |   |  |                    |  |                     |            |
| Attendent and the set of th  |  |                                      |   |  |                    |  |                     |            |
| Antibility and balance balanc  | rrent/Pending Delegation   |                                      |   |  |                    |  |                     |            |
| Facility Restriction:     Excitite Restriction:       Calcil systemping<br>Restriction:     Image: Calcil systemping<br>Restriction:     Image: Calcil systemping<br>Restriction:       Face: Last<br>Restriction:     Face: Last<br>Restriction:     Image: Calcil systemping<br>Restriction:       Calcil systemping<br>Restriction:     Leasters Restriction:       Calcil systemping<br>Restriction:     Image: Calcil systemping<br>Restriction:       Calcil systemping<br>Restriction:     Restriction:       Approprint Restriction:     Exciting Restriction:       Approprint Restriction:     Exciting Restriction:   | is Delegated Authority To Dat<br>& Delegated   |                                      | Not A                                   | Delegate   |                    | Date To Start  | Date To I           | ind        |
| And State State State     Filter List       Text Rest State State     Filter List       State State State State     Filter List       Address State State State     Filter List       Address State State State State     Filter List       Address State State State     Filter List       Address State State State State     Filter List       Address State State State State State     Filter List       Address State State State State State State     Filter List       Address State State State State     Filter List  | is Delegated Authority To Dat<br>t Delegated<br>striction Details  | 3 (All restriction                   | Not A                                   | Delegate   |                    | Date To Start  | Date To I           | ind        |
| And State State State     Filter List       Text Rest State State     Filter List       State State State State     Filter List       Address State State State     Filter List       Address State State State State     Filter List       Address State State State     Filter List       Address State State State State     Filter List       Address State State State State State     Filter List       Address State State State State State State     Filter List       Address State State State State     Filter List  | is Delegated Authority To Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have any<br>try/Update Restrictions   | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restriction: | Date To Start  | <u>Date To I</u>    | ind        |
| Varia Roski<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Protectual<br>Prote | is Delegated Authority Te Dat<br>I Delegated<br>striction Details<br>Restrictions in this area have any<br>try/Update Restrictions<br>Fa   | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restriction: | Date To Start  | Date To I           | ind        |
| perile Ratificans Foldy Ratificans Location Ratificans  Foldy Ratificans  Code Humping Code Code Code Code Code Code Code Code   | es Delegated Authority Te Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have any<br>try/Update Restrictions<br>Fa<br>Cabell Huntington<br>Acade Divide Divide   | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restriction: | Date To Start  | Date To I           | ind        |
| perile Ratificans Foldy Ratificans Location Ratificans  Foldy Ratificans  Code Humping Code Code Code Code Code Code Code Code   | In Deleasted Authority Te Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have an<br>try/Update Restrictions<br>For<br>Cablell Huntington<br>Rest: Division<br>For System Series  | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restrictions | Date To Starf  | Date To J           | <u>nd</u>  |
| perile Ratificans Foldy Ratificans Location Ratificans  Foldy Ratificans  Code Humping Code Code Code Code Code Code Code Code   | In Deleasted Authority Te Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have an<br>try/Update Restrictions<br>For<br>Cablell Huntington<br>Rest: Division<br>For System Series  | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restrictions | Data To Start  | Date To J           | <u>ind</u> |
| perile Ratificans Foldy Ratificans Location Ratificans  Foldy Ratificans  Code Humping Code Code Code Code Code Code Code Code   | In Deleasted Authority Te Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have an<br>try/Update Restrictions<br>For<br>Cablell Huntington<br>Rest: Division<br>For System Series  | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   | ation Restriction: | Date To Start  | Date To J           | <u>ind</u> |
| Calai Kuringtan<br>Arasis Hundari<br>Marsha Part<br>Bagana Sar Sarpery<br>Recentle<br>Aggregale Rastrictions:<br>Aggregale Rastrictions:<br>Specially Kalificions:<br>Specially Kalificions:<br>Aggregale Rastrictions:<br>Adjunction Service Rastrictions:  | In Deleasted Authority Te Dat<br>t Delegated<br>striction Details<br>Restrictions in this area have an<br>try/Update Restrictions<br>For<br>Cablell Huntington<br>Rest: Density<br>Foreigness Long   | All restriction<br>v selected items. | Not A                                   | Delegate<br>etween all modules.)   |                    | Date To Start  | Date To J           | ind        |
| Acces Provide Reserved Reser<br>Reserved Reserved R  | scalesofd Asthority. To Bat<br>Cologated<br>attriction Details<br>Reactivities in this area here any<br>try/Updata.Read/sitess<br>Pac<br>Cabell injustration<br>Acais injustration<br>Acais injustration<br>Variate Private<br>portion,Reatrictions  | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Date To Start  | Date To J           | ind        |
| Excludent style<br>Mitch Hond<br>Mitch Hond<br>M | scalesofd Asthority. To Bat<br>Cologated<br>attriction Details<br>Reactivities in this area here any<br>try/Updata.Read/sitess<br>Pac<br>Cabell injustration<br>Acais injustration<br>Acais injustration<br>Variate Private<br>portion,Reatrictions  | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Date To Start  | Date To J           | Ind        |
| Integrate Dar Storgery<br>Inverses<br>Aggregate Restrictions<br>Aggregate Restrictions<br>Expectibly Statificions<br>Expectibly Statificions   | a tabinata Anthenix La bat<br>Cological<br>atintise between<br>Resolutions in this area here are<br>resolutions in this area here are<br>Cological sustaining<br>Cological sustaining<br>Resolutions<br>Resolutions<br>Resolutions<br>Resolutions<br>Resolutions<br>Resolutions<br>Resolutions<br>Resolutions  | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Data To Start  | Date To J           | Ind        |
| Reverses  Representation  Repr   | a calendard Authority. Ta bet<br>Ordeyard<br>arteriae Datads<br>Facilitations in this area law an<br>error (Maddas Bentistians<br>reg. (Maddas Bentistians<br>Real instructions<br>Data instructions<br>Beaching Structures<br>Parties, Readinations<br>Facility for<br>Calent instructions<br>Calent instructions   | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Data To Start  | Data Ta J           | <u></u>    |
| Aggregate Restrictions Service Restrictions  | an colonated Automics. To bel<br>Original<br>attestine Datasis<br>Restrictions in this provides and<br>restrictions in this provides and<br>restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictio | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Date To Shert  | Data To J           | <u></u>    |
| Aggregate Restrictions Service Restrictions  | an colonated Automics. To bel<br>Original<br>attestine Datasis<br>Restrictions in this provides and<br>restrictions in this provides and<br>restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictio | Al resident                          | Net A                                   | Loksate<br>etween all modules.)<br>Lac   |                    | Date Is Sket   | Data La             | <u></u>    |
| Administrative Barvines a Anata Band Care Barvine a Anat Care Barvine  | an colonated Automics. To bel<br>Original<br>attestine Datasis<br>Restrictions in this provides and<br>restrictions in this provides and<br>restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictions<br>Restrictio | Al resident                          | Net A                                   | Cologet  |                    |  | Rein Lo             |            |
| Administrative Services Acute Aped Care Services Aged Care Services.<br>Ambulgtory & Community Services Aged Psychiatry Services.  | a calendard Anthenis Ta bet<br>Oragond<br>arteritor Oragond<br>Tarithe   | Meretrotion                          | Not A                                   | Duringent etheme ell modules.)  Los accition Restrictions  Piller List   |                    |  |                     |            |
| Ambulatory & Community Services Allergy, Immunology & Respiratory Aged Psychiatry Services.  | a calendard Anthenis Ta bet<br>Oragond<br>arteritor Oragond<br>Tarithe   | Meretrotion                          | Not A                                   | Duringent etheme ell modules.)  Los accition Restrictions  Piller List   |                    |  |                     |            |
| carpark Anaesthetics Alled Health  | a scheensta Aahoner, za bei<br>dongand<br>anterina Datadi<br>Kathikhen in the ana kana an<br>try Usedan Aahoner, in<br>Caladi kuntingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Anterodo  | Al restriction     vectorial serve.  |   | Chilopte<br>extreme ell modules )<br>Les<br>acattes Restriction<br>Filter Edd.<br>pecially Restrictions  | Filter List        |  | ke Ratricijan       |            |
| Einanza BES Anatomical Pathology   | a scheensta Aahoner, za bei<br>dongand<br>anterina Datadi<br>Kathikhen in the ana kana an<br>try Usedan Aahoner, in<br>Caladi kuntingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Caladi kuntingin<br>Kathikhen Kathikhen<br>Partingin<br>Anterodo  | Al restriction     vectorial serve.  | Nic A but a petition are shared by      | Chilopte<br>extreme ell modules )<br>Les<br>acattes Restriction<br>Filter Edd.<br>pecially Restrictions  | Pitter List        | Serv   | ke Ratricijan       | Cond       |
|  | A schemater Auchareur, zu einer<br>densemmen einer Ausschlassen auf<br>anstetten einer Ausschlassen auf<br>auf densemmen einer Ausschlassen auf<br>auf densemmen auf densemmen auf<br>densemmen auf densemmen auf<br>auf densemmen auf densemmen auf<br>auf densemmen auf densemmen auf<br>auf densemmen auf densemmen auf densemmen auf<br>auf densemmen auf densemmen aut densem   | Al restriction     white dams.       | Nic A but a section are shared by       | Chilopte<br>extreme ell modules )<br>Les<br>acattes Restriction<br>Filter Edd.<br>pecially Restrictions  | Filter Lot         | pd Orentenna.<br>pd Partenna.  | No Restriction:     |            |
| Nursing Services Community and Antoustory Community and Antoustory<br>Nursing Services Clinical Haematology Emergency Medicine<br>Psychistry Colorectal and General Surgery Engineering  | in a colonatorial contention to be to compared an extension of the compared and the compare   | Al restriction     white dams.       | Kick A up in this section are shored by | Conjegats  extenses of includes.)  Las  extenses of includes.)  Filter-Last  problem Restrictions  excellense Restrictions  excellense Restrictions  excellense Restrictions | Filter List        | Service Se | ke Rashfidion:      | (and       |

# Modifications: Adding or Modifying a Delegate for a User

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

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

### To assign a delegate

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

### 6. Press Save 6

|                                      |                             |                     |  |              |              |                  |           |                    | - 11 |
|--------------------------------------|-----------------------------|---------------------|--|--------------|--------------|------------------|-----------|--------------------|------|
|                                      |                             |                     | User Profile                             | es (Genera   | al)          |                  |           |                    | - 1  |
| Select User: Hayden, /<br>1 Users fo | Anne (ahayden)<br>und.      | •                   |  | User Regist  | try 5        | lave User        | New User  | Delete User        |      |
| User Name Filter:                    | havde                       | 👩 Manage Delegates  | s Webpage Dialog                         |              |              | -                | -         | And in case of the | -    |
| RiskMan User Type Filt               | ters                        |                     | Manage D                                 | elegates f   | for Hay      | den, Anne        | e (ahayde | n)                 |      |
| User Position Filters                |                             |                     |  |              |              |                  |           |                    |      |
| User Created After Da                | ite:                        | Add Delegate        | 7  |              |              |                  |           | 1                  |      |
| User Has Campus* Re                  | striction:                  |                     | staff member as<br>leone anna (Leone Ani |              | • <b>8</b> 🖪 |                  |           | I                  |      |
|                                      |                             |                     | Tuesday, 22 May 2012                     |              | •••          |                  |           |                    |      |
| Login Details                        |                             |                     | Thursday, 31 May 201:                    | 4            |              |                  |           | I                  |      |
|                                      |                             | End Date            | ,  | _            | • •          |                  |           |                    |      |
| User Display Name:                   | Hayden, Ann<br>Format as (L | L                   |  |              |              |                  |           |                    | _    |
| User Name:                           | ahayden                     | Delegate's Username | e Delegate                               |              | -            | ition start date | Delegal   | tion end date      | 4.   |
| Password:                            | ••••                        |                     |  | There are no | items to sho | win this view    |           |                    | _    |
| Email Address:                       | anne@riskm                  |                     |  |              |              |                  |           |                    |      |
| Phone Number:                        |                             |                     |  |              |              |                  |           |                    |      |
| Profile Duration:                    | Expires 0                   |                     |  |              |              |                  |           |                    |      |
|                                      | Never Ex                    |                     |  |              |              |                  |           |                    |      |
| Current/Pending Dele                 | gation                      |                     |  |              |              |                  |           |                    |      |
| Edit Delegation                      |                             |                     |  |              |              |                  |           |                    |      |

### To modify/delete an existing delegate

- 1. Locate the User under any Register or the General tab
- 2. Press the Edit Delegation 1 button
- 3. Double click the **Delegate's Name 2** in the list
- If you wish to modify the details of the delegate, make any respective changes and press Update (5)
- 5. If you wish to delete the delegation press Delete 4

|   |                         |                     | User       | Profiles (Ge    | neral)   |                       |           |                 | L |
|---|-------------------------|---------------------|------------|-----------------|----------|-----------------------|-----------|-----------------|---|
| elect User: Hayden, A<br>1 Users fo             | nne (ahayden)<br>und.   | •                   |            | User            | Registry | Save User             | New User  | Delete User     | L |
| User Name Filter:                               | hayde                   | 🙆 Manage Delegat    | es Webpa   | ge Dialog       |          |                       |           |                 |   |
| RiskMan User Type Filt<br>User Position Filter: | er:                     |                     | Ма         | nage Delega     | tes for  | Hayden, Anr           | ne (ahayd | en)             |   |
| User Created After Da                           | te:                     | Add Delegate        |            |                 |          |                       |           |                 |   |
| User Has Campus* Re                             | triction:               | Edit or select a    | staff me   | mber as your De |          |                       |           |                 |   |
|   |                         | Delegate            | leone anna | (Leone Anna)    | •        | <u> </u>              | -         |                 |   |
| Login Details                                   |                         | Start Date          | Tuesday, 2 | 2 May 2012      | ~        | 8                     | 4         |                 |   |
| -   |                         | End Date            | Thursday,  | 31 May 2012     | ~        | Update                | Delete    |                 |   |
| Jser Display Name:                              | Hayden, Ani             |                     |            |                 |          |                       |           |                 |   |
| Iser Name:                                      | Format as (I<br>ahayden | Please double click | to edit.   |                 |          |                       |           |                 |   |
| assword:  |                         | Delegate's Usernar  |            | Delegate's Name |          | Delegation start date | Dele      | gation end date |   |
| imail Address:                                  | anne@riskm              | Leone Anna          | 2          | leone anna      |          | 22 May 2012           | 31 0      | 4ay 2012        |   |
| hone Number:                                    |                         |                     | -          |                 |          |                       |           |                 |   |
| Profile Duration:                               | C Expires               |                     |            |                 |          |                       |           |                 |   |
|   | Never E:                |                     |            |                 |          |                       |           |                 |   |
| Current/Pending Dele                            | ation                   |                     |            |                 |          |                       |           |                 |   |
| Edit Delegation                                 |                         |                     |            |                 |          |                       |           |                 |   |
|   |                         |                     |            |                 |          |                       |           |                 |   |

### Modifications: Activate a User under a Register

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

All users will be active under the General & Feedback tabs

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

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

| General Incident Quality Activity   | y Risk Feedback        |                                    |                                 |              |
|-------------------------------------|------------------------|------------------------------------|---------------------------------|--------------|
| General Incluent Quality Activit    | y <b>KISK</b> TEEUDOCK |                                    |                                 |              |
|                                     | User Profi             | les (Risk)                         |                                 |              |
| Select Users<br>1055 Users found    |                        | User Registry                      | Save User New User              | Delete User  |
| Tues users round.                   |                        |                                    |                                 |              |
| User Name Filter:                   | Only She               | w Users with no permissions in thi | s register: Rebuild 'Select Use | er' List Now |
| RiskMan User Type Filter:           |                        |                                    |                                 |              |
| User Position Filter:               | -                      |                                    |                                 |              |
| User Created After Date:            | 🔿 Include              | users with no Permissions in Searc | ha                              |              |
| User Has Organisation* Restriction: | • Only she             | w active users in search:          |                                 |              |

- 2. If the user is not in the **Select User** List and the user can logon to RiskMan, it means that the user has a user profile in RiskMan, but is not active under that Register
  - Enter the user's first or last name in the User
     Name Filter <sup>(2)</sup> field
  - Check the "Only Show Users with no permissions in this register" (5) option
  - Press the Rebuild Select User List Now 4 button

|  |                         | Reports   Help   Log Out                             | USER: System           | i Manager (Manage |
|--|-------------------------|--|------------------------|-------------------|
| General Incident C   | Quality Activity   Risk | Feedback<br>User Profiles (Risk)                     | Ary Save User New User | Delete User       |
| 4 Users found.<br>User Name Filter:<br>RiskMan User Type Filter: | david 2                 | Only Show Users with no permis                       |                        |                   |
| User Position Filter:<br>User Created After Date:                |                         | <ul> <li>Include users with no Permissio</li> </ul>  |                        |                   |
| User Has Organisation* Restriction:                              | (                       | <ul> <li>Only show active users in search</li> </ul> | bi                     |                   |

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

# General Incident Quality Activity Risk Feedback User Profiles (Risk) @ "B there have been and the regiment of the re

A

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

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

### How do I delete a user?

Users can ONLY be deleted from the General tab

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

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

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

### To de-activate a user from a Register

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

|   | 😤 🥥 My Workspace   Mana                                 | gement Administratio                                   | Reports Help Log Out  | USER: System Man  | sger (Manager) |
|---|---|--|---|---|----------------|
|   | General Incident C                                      | Quality Activity Ri                                    | sk Feedback   |   | . î            |
|   |   |  | User Profiles (Risk)  | -   |                |
|   | Select User: Binns, David (David Bin<br>15 Users found. |  | o user David Binns have be  |   |                |
| 1 | User Name Filter:                                       | david  | Only Show Users with no permit  | ssions in this register: Rebuild 'Select User' List Now |                |
| ┦ | RiskMan User Type Filter:<br>User Position Filter:      |  | •   |   |                |
|   | User Created After Date:                                |  | Include users with no Permission  | ons in Search:  |                |
|   | User Has Organisation* Restriction                      |  | <ul> <li>Only show active users in search</li> </ul>  | des .   |                |
|   | Login Details   |  |   |   |                |
|   | User Display Names Binna, Dan                           | rid<br>(Lastname, Firstname)                           |   | This user's position is: Manager                        | -              |
|   |   | (Lastname, Firstname)<br>Supplies with a second second | This is a standard second s | ser's Risking User Type is: CLO                         | mather         |

| General Incident O  | uality Activity 🕇 Risk 🍸 Fe | eedback   |  |  |  |  |
|---|-----------------------------|---|--|--|--|--|
| ocheren includent ge  | , , ,                       |   |  |  |  |  |
|   | Use                         | er Profiles (Risk)  |  |  |  |  |
| The User Profile 'David Binns' for register Risk has been marked as deleted (not physically deleted), |                             |   |  |  |  |  |
| and can be restored if necessary.   |                             |   |  |  |  |  |
| Select User Tuber Found   |                             |   |  |  |  |  |
|   |                             |   |  |  |  |  |
| User Name Filter:   | david                       | Only Show Users with no permissions in this register: Rebuild 'Select User' List Now  |  |  |  |  |
|   | david .                     | Only Show Users with no permissions in this register: Rebuild 'Select User' List Now  |  |  |  |  |
| RiskMan User Type Filter:   | david<br>•                  | Only Show Users with no permissions in this register: Rebuild 'Select User' List Now  |  |  |  |  |
| User Name Filter:<br>RiskMan User Type Filter:<br>User Position Filter:<br>User Created After Date:   | david<br>•                  | Only Show Users with no permissions in this register: Rebuild Salect User List Now     Taclude users with no Permissions in Search: |  |  |  |  |

### To delete a user from RiskMan

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

1. Click on the General **0** tab

| General Inci                              | dent Quality Activ | vity Risk Feedback<br>User Profiles (General) | ß                                |
|---|--------------------|---|----------------------------------|
| Select Users Binns, David<br>18 Users for | (David Binna)      | • User Re                                     |                                  |
| User Name Filter:                         | David              |   | A Rebuild 'Select User' List Now |
| RiskMan User Type Filter                  | 1                  | Only Show Expired Users                       | •                                |
| User Position Filter:                     |                    | <ul> <li>Only Show Deleted Users:</li> </ul>  |                                  |
| User Created After Date                   | 1                  | Include Deleted/Expired Users in Sea          | arch:                            |
| User Has Campus® Rest                     | ictions            |   | search:                          |
| <u> </u>                                  |                    |   |                                  |

- 2. Locate the user. Either
  - Select the user from the Select User 2 list; or
  - Enter filter criteria in one of the filter fields 6 and Press "Rebuild 'Select User' List Now" 4. Select the user from the Select User 2 list
- 3. Press Delete User 😏

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

| General 🚺 Incident                               | Quality Activity Ris | lisk Feedback                                |  |  |  |  |
|--|----------------------|--|--|--|--|--|
|  |                      | User Profiles (General)                      |  |  |  |  |
| The User Profile 'David Binns' has been deleted. |                      |  |  |  |  |  |
| ielect User:<br>17 Users found.                  | •                    | User Registry Save User New User Delete User |  |  |  |  |
| User Name Filter:                                | David                | Rebuild 'Select User' List Now               |  |  |  |  |
| RiskMan User Type Filter:                        |                      | Only Show Expired Users:                     |  |  |  |  |
| User Position Filter:                            |                      | Only Show Deleted Users:                     |  |  |  |  |
| User Created After Date:                         |                      | O Include Deleted/Expired Users in Search:   |  |  |  |  |
| User Has Campus* Restriction:                    |                      | O Exclude Deleted/Expired Users from search: |  |  |  |  |

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

| General   Incident  |   | isk Feedback                                    |                            |                                   |  |  |  |
|---|---|---|----------------------------|-----------------------------------|--|--|--|
|   |   | Harry Des files ( f                             |                            |                                   |  |  |  |
|   |   | User Profiles (G                                | eneral)                    |                                   |  |  |  |
| The User Profile 'anne' has records in RiskMan.   |   |   |                            |                                   |  |  |  |
| In order not to lose the historical record, it has been marked as deleted (not physically deleted), and |   |   |                            |                                   |  |  |  |
|   |   |   |                            |                                   |  |  |  |
| can be restored if necessary.   |   |   |                            |                                   |  |  |  |
| Select User:  |   | ii be restored ii i                             |                            | Save User New User Delete User    |  |  |  |
| Select User:<br>17 Users found.   |   | n be restored in                                |                            | Save User Delete User Delete User |  |  |  |
|   |   |   | User Registry              | Save User New User Delete User    |  |  |  |
| 17 Users found.<br>User Name Filter:  | • |   | User Registry              | ,                                 |  |  |  |
| 17 Users found.<br>User Name Filter:<br>RiskMan User Type Filter:                                       | • | • Only Show Expired Use                         | User Registry<br>Re        | ,                                 |  |  |  |
| 17 Users found.<br>User Name Filter:<br>RinkMan User Type Filter:<br>User Position Filter:              | • | Only Show Expired Use     Only Show Deleted Use | User Registry<br>Re<br>FSI | ,                                 |  |  |  |
| 17 Users found.<br>User Name Filter:<br>RiskMan User Type Filter:                                       | • | • Only Show Expired Use                         | User Registry<br>Re<br>FSI | ,                                 |  |  |  |

### How do I restore a deleted user?

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

## To restore a user that was flagged as deleted from RiskMan

- 1. Click on the **General 1** tab
- In the Filter Criteria section check "Only Show Deleted Users" ②
- 3. Press the Rebuild 'Select User' List Now <sup>6</sup> button
  - The Select User ④ list will now show all users who have been flagged as deleted. Select the user from this list

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

| 0                         | dministration Reports Help Log Out         | USER: System Manager (Mani        |
|---------------------------|--|-----------------------------------|
| General Incident Quality  |  |                                   |
|                           | User Profiles (General)                    |                                   |
| elect Useri               | User Registry S                            | Save User Delete User Delete User |
| User Name Filter:         | <b>B</b>                                   | uild 'Select User' List Now       |
| RiskMan User Type Filter: | Only Show Expired Users:                   |                                   |
| User Position Filter:     | Only Show Deleted Users: 2                 |                                   |
| User Created After Date:  | Include Deleted/Expired Users in Search:   |                                   |
|                           | Exclude Deleted/Expired Users from search: |                                   |

### 4. Press the Undelete User <sup>5</sup> button

| 😤 🥥 My Workspace   Manager                   | nent Administration Reports Help Log Out   | USER: System Manager (Manager)       |
|--|--|--------------------------------------|
| General Incident C                           | Quality Activity 🍸 Risk 🍸 Feedback   |                                      |
|  | User Profiles (General)  | 6                                    |
| Select Useri anne (anne) w<br>1 Users found. |  | User Registry New User Undelete User |
| User Name Filter:                            |  | Rebuild 'Select User' List New       |
| RiskMan User Type Filter:                    | <ul> <li>Only Show Expired Users:</li> </ul>   |                                      |
| User Position Filter:                        | Only Show Deleted Users:   |                                      |
| User Created After Date:                     | O Include Deleted/Expired Users in Search:   |                                      |
| User Has Campus® Restriction:                | <ul> <li>Exclude Deleted/Expired Users from sear</li> </ul>  | chi                                  |
| - address to be a support                    | (This user was deleted on 22 May 201.<br>Yee cannot save any changes, Undelete first if changes re | wired.                               |

- The User is now restored <sup>(3)</sup> under the General & Feedback tabs
  - If there are **no changes to the user's profile**, it will **not be necessary** to press the **Save User** button
  - If you wish to make changes to the user's profile, modify as required and press Save User
- Repeat steps 2 5 under each Register tab from which you wish to restore this user e.g. Incidents, Risk, Quality

| My Workspace Management J     | Administration Reports Help Log Out                        | USER: System Manager (Mar                   |
|-------------------------------|--|---|
| General Incident Quality      | Activity Risk Feedback                                     |   |
|                               | User Profiles (General)                                    |   |
|                               | <b>6</b> User Undeleted.                                   |   |
| elect Useri anne (anne) 👻     | User Registr   | ry Save User New User Delete User           |
| User Name Filter:             |  | Rebuild 'Select User' List Now              |
| RiskMan User Type Filter:     | <ul> <li>Only Show Expired Usersi</li> </ul>               |   |
| User Position Filter:         | <ul> <li>Only Show Deleted Users:</li> </ul>               |   |
| User Created After Date:      | Include Deleted/Expired Users in Search                    | 1   |
| User Has Campus® Restriction: | <ul> <li>Exclude Deleted/Expired Users from sea</li> </ul> | rchs  |
| opin Details                  |  |   |
|                               |  |   |
| ser Display Name:             |  | This user's position is:                    |
| Format as (Lastname, )        |  | er's RiskMan User Type Isi Risk Manager 🗸 👻 |

### To reactivate a user under a specific Register

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

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

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

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

The label of a Field or Section Name and the background

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

| A Who Was Affected?                           |                  |
|---|------------------|
| Lincident Involved                            | Entry Required 👻 |
| Sirst Name                                    | Entry Required 👻 |
| /surname                                      | Entry Required 👻 |
| Born of Birth and the second start and second | . Cotw.Required  |

Example: Fields on the Incident Entry form

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

- The user requires the following Administrative
   Permission under the General tab: Can Modify Global
   Settings
- A user profile needs to be open in the respective Register
- 1. Click on the respective Register **0** tab
- 2. Select any user from the Select User 2 list

| General Incident Quality Ac                        | tivity Risk Feedback                                     |  |
|--|--|--|
|  | User Profiles (Incident)                                 |  |
| Select Useri Hayden, Anne (ahayden) 2              | • User Registry  | Save User New User Delete User                     |
| User Name Filter:                                  | Only Show Users with no permission                       | s in this register: Rebuild 'Select User' List Now |
|  | *  |  |
| RiskMan User Type Filter:                          |  |  |
| RiskMan User Type Filter:<br>User Position Filter: |  |  |
|  | <ul> <li>Include users with no Permissions in</li> </ul> | Search   |

### To modify a field label

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

| Summary         | <b>, 0</b>   | Entry Required 🔽 |
|-----------------|--|------------------|
| <b>ADetails</b> |  | Optional Entry 🔽 |
| Edit Field Deta | il   | ×                |
| Entry           |  |                  |
| Title 🕢         | Details 3  | ×                |
| Report          |  |                  |
| Title 🕜         | Details 2  |                  |
|                 | Display 🕡 🗹 Condition 🕡 🗹 Group 🔞 [  |                  |
| Alert           |  |                  |
| Title 🕜         | Details 4  |                  |
|                 | Display 🭘 🖌 Condition 🍘 🖌  |                  |
| Advanced        |  |                  |
| Post Cell 🕜     | <img alt="Check Spelling" parent.fnsp<="" src="images/spellcheck.gif&lt;/td&gt;&lt;td&gt;onclick=" td=""/> |                  |
| Script 🕜        | onfocus="parent.fnPreSpellCheck(this);"  | $\sim$           |
|                 | ld 🝘 🛛 Obj Class 🔞   |                  |
|                 | TD Class 🔞 TR Class 🔞  |                  |
|                 |  |                  |
|                 | SAVE   | CANCEL           |

- 2. Enter the label in the **New Title Text** <sup>(2)</sup> field (*this is the field on the respective Register form*)
- The new title should be reflective in the Reports and Alerts, so modify the New Reporting Title ③ and Alert Title ④ fields accordingly
- 4. If your Entry form has more than one label with the same name, ensure the labels for the **Alert Title** and **Report Title** are such that users are able to distinguish which Entry form label the field is referring to (refer to examples below of the "Notify of Associated Incidents" label on the Risk Entry form)

|  | Hide Key Personnel Se  | ction:            |
|--|--|-------------------|
| Risk Owner<br>Risk Coordinator<br>Opened By<br>Closed By | Dont Display         V           Mont Display         V           Mont Display         V           Montify of Associated Incidents         Dont Display           Optional Entry         V           Dont Display         V           Mont Display         V           Optional Entry         V           Dont Display         V |                   |
| Edit Field RRN   | otifyLvI10fAI  |                   |
| Entry<br>Title 🕜   | Notify of Associated Incidents   | ×                 |
|  |  |                   |
| Report   |  |                   |
| Title 🕜  | Notify Accountable Executive of Associated Incident  |                   |
|  | Display 🝘 🗹 Condition 🝘 🗹 Group 🔞 🖌  |                   |
| Alert  |  |                   |
| Title 🕜  | Notify Accountable Executive of Associated Incident  |                   |
|  | Display 🝘 🗹 Condition 🍘 🗸  |                   |
| Advanced   |  |                   |
| Post Cell 🕢  |  | $\mathbf{\wedge}$ |
| Script 🕜   |  | $\sim$            |
|  | ld 🕡 Obj Class 🔞   | 7                 |
|  | TD Class 🔞 TR Class 🔞  | Ĩ                 |
|  |  |                   |
|  | SAVE CANCE   | -1                |

| Example: "Notify of Asso | ciated Incident  | s" referring to | tł |
|--------------------------|------------------|-----------------|----|
| Accountable Executive of | n the Risk Entry | form            |    |

| Edit Field RRN | otifyLvI1OfAI                                       |   |
|----------------|---|---|
| Entry          |   |   |
| Title 🕜        | Notify of Associated Incidents ×                    |   |
| Report         |   | _ |
| Title 🕜        | Notify Accountable Executive of Associated Incident |   |
|                | Display 🍘 🗹 Condition 🍘 🗹 Group 🍘 🗹                 |   |
| Alert          |   | _ |
| Title 🕜        | Notify Accountable Executive of Associated Incident |   |
|                | Display 🔞 🖌 Condition 🔞 🗸                           |   |
| Advanced       |   | _ |
| Post Cell 🕜    | 0   |   |
| Script 🕜       |   |   |
|                | ld 🔞 🛛 Obj Class 🔞                                  |   |
|                | TD Class @ TR Class @                               |   |
|                |   |   |
|                | SAVE CANCEL   |   |

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

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

| Edit Field Emp   | loyeeSite     |             |           |     | ×                 |
|------------------|---------------|-------------|-----------|-----|-------------------|
| Entry<br>Title 🕜 | *GS_ SiteName |             |           |     |                   |
| Report           |               |             |           |     |                   |
| Title 🕜          | *GS_ SiteName |             |           |     |                   |
|                  | Display 🕜 🖌   | Condition 🕜 | 🖌 Group 🕜 |     |                   |
| Alert            |               |             |           |     |                   |
| Title 🕜          | *GS_ SiteName |             |           |     | ×                 |
|                  | Display 🕜 🖌   | Condition 🕜 | <b>v</b>  |     |                   |
| Advanced         |               |             |           |     |                   |
| Post Cell 🕡      |               |             |           |     | $\langle \rangle$ |
| Script 🕜         |               |             |           |     | $\bigcirc$        |
|                  | ld 🕜          |             | Obj Class | 0   |                   |
|                  | TD Class 🕜    |             | TR Class  | 0   |                   |
|                  |               |             | s         | AVE | CANCEL            |

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

### Global Settings = Site where Incident Occurred

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

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

### To modify a Section Title/Colour or Background Colour

1. Click on the 4 icon • next to the Section Title

| Dates ()            | بر المادين الماد المحاصل المستعمر المحاصل المحاصل المحاصل المحاص المستعمر والمادين المراجع المادين المستعمر<br>المحاصل المحاص المحاص<br>المحاص |
|---------------------|---|
| & Admission Date    | Dont Display  |
| A Incident Date     | Entry Required 👻  |
| & Notification Date | Dont Display -  |

2. Modify the label in the **Current Section Title 2** field (*this is the field on the respective Register form*)

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

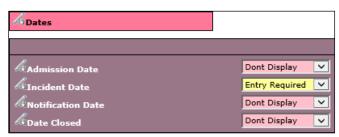
| Edit Section         | 2      |                        |               |           | ×      |
|----------------------|--------|------------------------|---------------|-----------|--------|
| Section —<br>Title @ | Fill @ | SectionName<br>#997788 | 2<br>Text 🔞 🤇 | #FFFFFF   | ×      |
|                      |        | <b>3</b>               |               | 4<br>SAVE | CANCEL |

 To change the background colour and text colour of the section click on the respective Choose Background Colour 

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

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

### 4. Press Save when complete



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

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

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

### To access the User Registry page either

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

| Genera            | I Incident Quality Act   | tivity Risk Feedback                         |                      |
|-------------------|--|--|----------------------|
|                   |  | User Profiles (General)                      |                      |
| Select User:      | Hayden, Anne (shayden)<br>1148 Users found.<br>Only displaying first 500 users 😿 | User Registry     Save User                  | New User Delete User |
| User Name         | Filter   | Rebuild 'Selec                               | t User' List Now     |
| <b>RiskMan Us</b> | er Type Filter:  | Only Show Expired Users:                     |                      |
|                   | n Filter   | <ul> <li>Only Show Deleted Users:</li> </ul> |                      |
| User Positio      |  |  |                      |
|                   | ed After Date:   | Include Deleted/Expired Users in Search:     |                      |

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

|  |  |                                    |                     | Iser Regis         |         |            |            |              |        |             |
|--|--|------------------------------------|---------------------|--------------------|---------|------------|------------|--------------|--------|-------------|
| w Columnus 🗹 transforme  | ere 🗹 Date Crasted 🗌 Date Report 🗹 Dat | n Deland 🗌 etal Méles 🗌 etal Daras | n ⊠berstaat aan Z∹a | olato I E traines  |         |            |            |              |        |             |
| Nuclea III   | turs Depend thors of latin thors       |                                    |                     |                    |         |            |            |              |        |             |
|  |  |                                    |                     |                    |         |            |            |              |        |             |
| + Equal - De   | daye                                   |                                    |                     |                    |         |            |            |              |        |             |
|  |  |                                    |                     |                    |         |            |            |              |        |             |
| ng a column header here so   | group by the polyme.                   |                                    |                     |                    |         |            |            |              |        |             |
| Der Kant   | Strategener                            | S Crotement Are                    |                     | 10 antes 14        | discont | Technop    | Polyantan. | Thorne       | 1 1444 | T tot tops  |
|  | 0                                      | \$                                 | · ·                 |                    |         | •          |            | 2 · ·        |        | 9           |
| 63.  | Tool they                              | Alministration                     | 0.64                | oduk.              | 80      | 80         |            | 04 Nov 2016  |        |             |
| hiraj  | Ohing O                                | 648                                | Signary             | 0.04               | 80 E    | 101        |            | 15 Jan 2016  |        |             |
| nne Hayden   | Anne Høyden                            |                                    | the Marager         | Get Warager        | 84      | Tes.       |            | 89.34 2053   |        |             |
| ainee 7  | Traines 7                              | Acting Charge Name                 | Risk Ner Drugston   | Rick Wer Dougston  | 89      | 59         |            | 09 Jan 2012  |        | 21 Mar 2012 |
| ainee 6  | Trainee 6                              | Acting Charge Name                 | Ruk Ner Disarian    | Roll Mar Devortion | 59      | 59         |            | 09 Jan 2012  |        | 02 May 2012 |
| ainee 8  | Arti Kazareth                          | Acting Charge Name                 | RiskNer Records     | Rikiter Sciation   | THE     | 52         |            | 09 Jan 2012  |        | 03 May 2012 |
| rainee S   | Traines 5                              | Acting Charge Name                 | Risk New Delucation | Robinst Education  | 53      | 53         |            | 09 Jan 2012  |        | 07 Jun 2062 |
| rainee 3   | Trainee 3                              |                                    | RokNer Brisorden    | Rok Nor Decastory  | 53      | 50         |            | 09 Jan 2912  |        | 14 Jun 2012 |
| oecultive  | Doecutive                              |                                    | Grint               | Offer:             | 59      | Tes        |            | 00.84 2032   |        | 12.14 2012  |
| nce  | Webb, Diman                            | Castar                             | Digenaer            | Care as            | 89      | Tex        |            | 15 Aug 2012  |        | 00 Del 2012 |
| ainer  | Jone Krylen                            | Acting Charge Name                 | Supervaler          | Specae             | Ter     | 50         |            | 15 Feb 20c2  |        | 26-0m 2812  |
| bradfield  | Personal Received                      |                                    | 0.64                | the state          | 89 E    | The second |            | 31 Oct 2912  |        | 31.04 5875  |
| ad .   | Paulkner, Laura                        | Pacil                              | agenta.             | bigenera           | 51      | Ro.        |            | 48. Aug 2002 |        | 19 Nor 2012 |
| noodu  | Nosisida, Christine                    | Doctor Consultante                 | Signater            | Spenne             | 50      | Ter        |            | 61 Aug 2012  |        | 10 Nev 2012 |
| att take   | walks, we are use                      |                                    | Unit Stanager       | Carear             | 58      | Ter        |            | 64 Jan 2000  |        | 13 Jan 2013 |
| sk Manager   | Rok Manager                            | Ministration                       | Preser              | Risser'            | 34      | 50 C       |            | 20 K + 302   |        | 15 Mor 2018 |
| since 1  | Traines 2                              | Aring Clarge Barter                | Robins Repairing    | Robust Relation    | 341     | 81 C       |            | 09 Jan 2012  |        | 15 Apr 2014 |
| Games 2  | Traines 2                              |                                    | Risk Ner Education  | Risk War Dougston  | 50      | 50         |            | 09 Jan 2012  |        | 13 Apr 2014 |
| all and a second se | Fernandez, Rott                        | Doctor - Consultant                | Planagar            | Pangar             | Ter     | Ter        |            | 11 Jan 2905  |        | 20 May 2034 |
| <  |  |                                    |                     |                    |         |            |            |              |        | >           |

### **Display Option Definitions**

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

### <u>User List</u>

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

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

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

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

### Suggested Groupings for your User Profile List

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

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

| Columns D Employment         | 🗹 Dara Crassel 🗆 Dara Dipirad 🗹 Dara | Deiened 🗆 effell Address 🗆 effel Dom | in 🗹 Gen Lan Logir 🗹 Templa | er   🗆 Indorre  | Dischaginger  |                 |   |              |           |              |
|------------------------------|--------------------------------------|--------------------------------------|-----------------------------|-----------------|---------------|-----------------|---|--------------|-----------|--------------|
| Desploy: Deleted Conv        | Depired them R Arrise Users          |                                      |                             |                 |               |                 |   |              |           |              |
| · Color                      | -                                    |                                      |                             |                 |               |                 |   |              |           |              |
| · Expand · Colley            |                                      |                                      |                             |                 |               |                 |   |              |           |              |
|                              |                                      |                                      |                             |                 |               |                 |   |              |           |              |
| Ceneral Template             |                                      |                                      |                             |                 |               |                 |   |              |           |              |
|                              |                                      |                                      |                             |                 |               |                 |   | -            |           |              |
| S User Name                  | S Display Name                       | S Despisyment Rule                   | 🕼 Feedback Ter              | alle max Coatt? | Titles Hanage | Allocated Stee  |   | Created      | B Deleted | Ψ Last Login |
|                              | 2                                    | 8                                    | 9 9                         | 2               |               |                 | 9 | - 7          | 0         |              |
| General Templater Dalack     |                                      |                                      |                             |                 |               |                 |   |              |           |              |
| tuper                        | Test User                            | Administration                       | Saluck.                     | Na              | 50            |                 |   | 04 May 2018  |           |              |
| Executive                    | Energyine                            |                                      | Defect                      | No              | Ter           |                 |   | 10 84 2912   |           | 1234 2012    |
| Mradleid                     | Howard Snacheld                      |                                      | 0.dak                       | No              | 96            |                 |   | 31 Oct 2062  |           | 31.041.2812  |
| Meditark                     | Maddumk                              |                                      | Defect                      | Ne              | 51            |                 |   | 10 Heb 2013  |           | 12768-2019   |
| RiskNan User                 | Rak/Kan User                         |                                      | Default                     | Na              | No.           |                 |   | 19-0412086   |           | 04 X to 2016 |
| default                      | Default User                         | Arting Charge Water                  | Datak                       | No              | Tio           | Associa Deinate |   | 25 76+ 2011  |           | 05 Apr 2817  |
| General Templater Hanager    |                                      |                                      |                             |                 |               |                 |   |              |           |              |
| Risk Managar                 | Ride Manager                         | Administration                       | Panager                     | Ser             | 50            |                 |   | 20 Mar 2002  |           | 15 Nov 2013  |
| Brett.                       | Fernandez, Drett                     | Comp Consultant                      | Panagar                     | Var             | Tel           |                 |   | 11 Jun 2005  |           | 20 Hay 2014  |
| annah                        | Haydeo, Anne                         | Service Dector                       | Darfore R                   | Sea             | Tes           |                 |   | 03 Aug 2082  |           | 20 May 2014  |
| Marky Mark                   | Marky Mark                           | Vard Cark                            | Cales k                     | Na              | Tea           |                 |   | 22 Dec 2004  |           | 22 Cec 2014  |
| haupt                        | Lauren Haupt                         | Breigeny Department                  | Dafait                      | 80              | Tes           |                 |   | 8035 ral. 05 |           | 1833/2006    |
| General Templata: Makifran D |                                      |                                      |                             |                 |               |                 |   |              |           |              |
| Trainee 7                    | Titinee 7                            | Acting Charge Husse                  | RakPan Education            |                 | 50            |                 |   | 09 Jan 2002  |           | 21 Her 2312  |
| Trainee 6                    | Trainee C                            | Aning Charge Burne                   | Steldfen Disaston           |                 | 58            |                 |   | 00 Jan 2002  |           | 02 May 2012  |
| Trainee 8                    | Arti hazaroth                        | Acting Charge Muse                   | WakMan Education            |                 | 50            |                 |   | 09 Jan 2002  |           | 03 May 2112  |
| Trainee 5                    | Traines 2                            | Astro Charge Name                    | Reiden Education            |                 | Na .          |                 |   | 00 Jan 2002  |           | 07.3an 2012  |
| Tranee 3                     | Trainee 3                            |                                      | Rold an Education           |                 | 80            |                 |   | 2805 mil 19  |           | 543 m 2812   |
| Traines 1                    | Traines 1                            | Acting Charge Base                   | RakMan Education            | Yea             | No.           |                 |   | 09 Jan 2002  |           | 15 Apr 2814  |

Example: Users grouped by their assigned General Template

|                                  |                              |                                      |                              | er Regis    |              |                |   |             |           |             |
|----------------------------------|------------------------------|--------------------------------------|------------------------------|-------------|--------------|----------------|---|-------------|-----------|-------------|
| Columners Virginianum Vir        |                              | Deleted Cartel Address Cartel Corner | Antonio Inter Alternity      |             | Independent  |                |   |             |           |             |
|                                  |                              |                                      | and the second second second | 1 - 1000    | - monthing   |                |   |             |           |             |
| Displays Calebal Overs           | Digited Users 🗹 Allive Users |                                      |                              |             |              |                |   |             |           |             |
| Expand Colleges                  |                              |                                      |                              |             |              |                |   |             |           |             |
|                                  |                              |                                      |                              |             |              |                |   |             |           |             |
|                                  |                              |                                      |                              |             |              |                |   |             |           |             |
| Feecbeck Template (Original)     |                              |                                      |                              |             |              |                |   |             |           |             |
|                                  |                              |                                      |                              |             |              |                |   |             |           |             |
| S that Name                      | S Dupley Name                | September Fale                       | 🗘 General Temp               | the no bull | T Has Manage | A posted bites |   | Cruzed 2    | B Delated | Last Login  |
|                                  |                              | 2                                    | 2 2                          |             | 2            |                | 2 |             | 2         |             |
| Feedback Targebra (Drightal) De  |                              | 180                                  |                              |             |              |                |   |             |           |             |
| tuser                            | Test Uper                    | Altriazosia                          | Defende                      | No          | No.          |                |   | 01 May 2014 |           |             |
| Dhial                            | Ohma: 0                      | 080                                  | bigerieer                    | No          | 70           |                |   | 13 Am 2006  |           |             |
| Freedow                          | Enecutive                    |                                      | Details                      | No          | 14           |                |   | 10 14 2012  |           | 12 341 2012 |
| Smon                             | Webbs Simon                  | Geny                                 | Separat                      | No          | 16           |                |   | 589 get 21  |           | 09-0412942  |
| horadfield                       | Howard Bradfield             |                                      | Default                      | No          | Tee          |                |   | 35 Oct 2002 |           | 34 Oct 2942 |
| Scott Esker                      | Eder, South D.               |                                      | Unit Manager                 | No          | 18           |                |   | 01 Ibn 2002 |           | 15 Jan 2943 |
| arnsh                            | Haydan, Anna                 | Sevie: Demor                         | Tanger                       | Yes         | Tee          |                |   | 01 Aug 2012 |           | 20 May 2014 |
| Harky Hark                       | Nadey Mark                   | Want Clivic                          | Hanger                       | No          | 3H           |                |   | 32.0ec 2014 |           | 22 Dec 2014 |
| Nodibank                         | Meddanik                     |                                      | Defeate                      | No          | 58           |                |   | 10 Teb 2015 |           | 12 Teb 2018 |
| haupt                            | Lauren Haupt                 | Emergency Department                 | Ranger                       | Yes         | THE .        |                |   | 33 Ian 2006 |           | 18 Jul 2014 |
| Risk/Nan User                    | RickMon User                 |                                      | Defealt                      | Ne          | 74 C         |                |   | 17 Oct 2000 |           | 04 Nev 2310 |
| default                          | Default User                 | Acting Diarge Nume                   | Default                      | No          | Tes .        | Acacla Rrivata |   | 25 Nov 2011 |           | 06 Apr 2317 |
| Feedback Templata (Original) III |                              |                                      |                              |             |              |                |   |             |           |             |
| Rask Manager                     | Rak Hanager                  | Almietosia                           | Braye                        | Nr5         | No           |                |   | 23 May 2012 |           | 55 May 2013 |
| Brott                            | Permandes, Brett             | Destor - Consident                   | Tenape                       | 50          | 76           |                |   | 11 Aut 2000 |           | 28 May 2004 |
| Feedback Targetes (Srights), Ri  |                              |                                      |                              |             |              |                |   |             |           |             |
| Trainee 7                        | Traines 7                    | Acting Charge Furse                  | Rak Van Education            |             | 50           |                |   | 09 Jan 2002 |           | 21 Mar 2012 |
| Trainee 6                        | Traines C                    | Ading Usings Nurse                   | Rolinfan biosation           |             | No.          |                |   | 09 Jun 2002 |           | 00 Mey 2052 |
| Trainee B                        | Arti Nazareth                | Adding Charge Furse                  | RakHan Education             | 142         | No           |                |   | 09 Jan 2002 |           | 00 Ney 2012 |

Example: Users grouped by their assigned Feedback Template.

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

| Presi Domain |                                |  |  |
|--------------|--------------------------------|--|--|
|              | 🙁 User Name                    |  |  |
|              | ♥                              |  |  |
|              | Medibank                       |  |  |
|              | RiskMan User                   |  |  |
|              | Line Manager                   |  |  |
|              | Manager                        |  |  |
| Ξ            | domain: @cpl,com.au            |  |  |
|              | lhaupt                         |  |  |
| Ξ            | domain: @riskman.net           |  |  |
|              | lauraf                         |  |  |
| Ξ            | domain: @riskman.net.au        |  |  |
|              | Anne Hayden                    |  |  |
|              | Simon                          |  |  |
|              | chrissyn                       |  |  |
|              | Scott Esler                    |  |  |
|              | anneh                          |  |  |
|              | Lauren                         |  |  |
|              | default                        |  |  |
| -            | domain: @softwaredesign.com.au |  |  |
|              | Brett                          |  |  |
| -            | domain: @test.com              |  |  |
|              | tuser                          |  |  |

3. **Display Name** – Checks to see if a user has more than one logon in RiskMan

|   | 🙎 User Name                         | Employment Role     |  |  |
|---|-------------------------------------|---------------------|--|--|
|   |                                     | •                   |  |  |
| - | User Display Name: Anne Hayden      |                     |  |  |
|   | Anne Hayden                         |                     |  |  |
|   | Trainer                             | Acting Charge Nurse |  |  |
| 0 | User Display Name: Arti Nazareth    |                     |  |  |
|   | Trainee 8                           | Acting Charge Nurse |  |  |
| Ξ | User Display Name: Default User     |                     |  |  |
|   | default                             | Acting Charge Nurse |  |  |
| Ξ | User Display Name: Dhiraj D         |                     |  |  |
|   | Dhiraj                              | CEO                 |  |  |
| ۳ | User Display Name: Esler, Scott D.  |                     |  |  |
|   | Scott Esler                         |                     |  |  |
| ٦ | User Display Name: Executive        |                     |  |  |
|   | Executive                           |                     |  |  |
| - | User Display Name: Faulkner, Laura  |                     |  |  |
|   | lauraf                              | Priest              |  |  |
| - | User Display Name: Fernandez, Brett |                     |  |  |
|   | Brett                               | Doctor - Consultant |  |  |

### How do I assign staff to Managers?

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