Roam: Entering a Record

For RiskMan Version 2403

Last reviewed September 2023

Contents

Introduction

How does it all work?

The RiskMan **Roam app** has been designed to allow you to easily capture data using mobile devices.

The purpose of Roam is to allow you to enter the critical information on the go. The, when you're able to, log into you PC and complete the rest of the details.

Your business will determine the path you will take to be able to enter a record via Roam. The goal is to keep it simple. Your entry form might have a large number of fields – more than 50, depending on your system configuration and Template settings. Obviously, it would be impractical for you to fill in so many fields using your mobile device; after all, the intent is generally to enable *quick* data capture.

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About the Roam app

The Roam app is available for iOS (Apple) and Android devices. The app can be found and downloaded to your device by searching for "RiskMan Roam" or even just "Roam" in your preferred app marketplace. There is no charge to download and use the app.

The app is designed so that the user experience between iOS and Android devices is essentially identical.

The minimum operating system requirements to use Roam on a mobile device are:

- **iOS 12** and higher for Apple devices
- **Android 10 Quince Tart (Version 10.0)** and higher for Android devices

Though the app can be freely downloaded and installed on a device, you will not be able to capture any data until you have a passkey that is provided to you by your administrator and login with your user name a password.

Registering to use the app

After Roam is installed on your device, you will need a **Passkey**, along with your RiskMan **Username and Password**, in order to authenticate your device before you can capture data:

Image 1

- **Passkey** – a unique text string that identifies your device to your organisation, and allows the app to use the **RoamConnect** service via the internet. The passkey is defined by the System Administrator who will provide the Passkey to you.

  Once you have entered the passkey supplied by your System Administrator, you will be directed to the RiskMan splash page to log in.
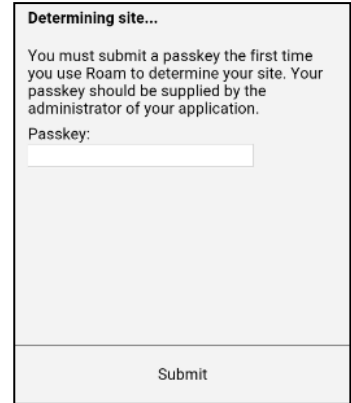
- **Username & Password** – This is your existing username and password to login to RiskMan.

  Once a you have successfully registered your device, you no longer need to sign in when you want to use the app. Depending on your Roam settings, you may be required to re-authenticate your user credentials and enter your Username and Password.

  Depending on your organisation's authentication service, you may be directed to different log in screens. All users will see the Passkey screen (Image 1) and will then proceed onto the RiskMan Splash screen (Image 2).

  Below are the log-in screens you may be presented with depending upon your organisation's authentication service.
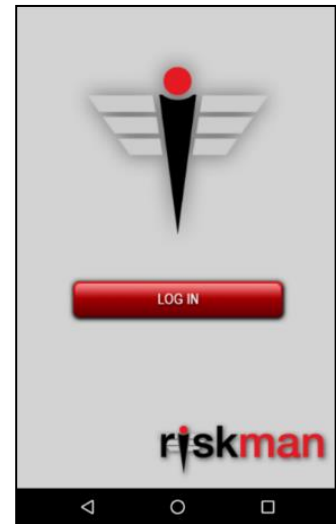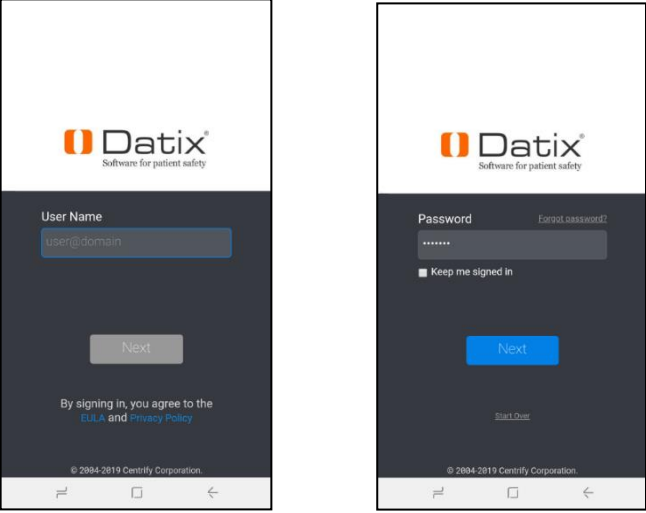

Image 2

SAML	
RiskMan Standard Login	
RiskMan Standard Login (Existing registered device)	The device will be registered with your RiskMan system if it has previously been logged-in. You will need to enter your **Username** and **Password**

Using the Roam App

My Records

Once logged-in you will see the **My Records** page. The My Records page will display the **Record Type** of previous submissions, the **Date Entered** for each record type, and their **Status**. Click **Add New** to start a new record


Record Status

Ticks under the **Status** column represent the submission status of your records. The Ticks will display in either **Green** or **Grey**. Roam allows you to submit records on or offline. If offline, Roam will wait until a network connection has been established and automatically submit the record.

Initial submissions of your record will display Grey, meaning they have yet to be imported into your RiskMan system

Once the import has been completed, the Tick will display in Green and you can now access the record within the RiskMan system

Viewing Record Details

Click the record from the **My Records** page to view the record details. This will display the status of the record submission. Once the record has been submitted, it will display the record ID number.
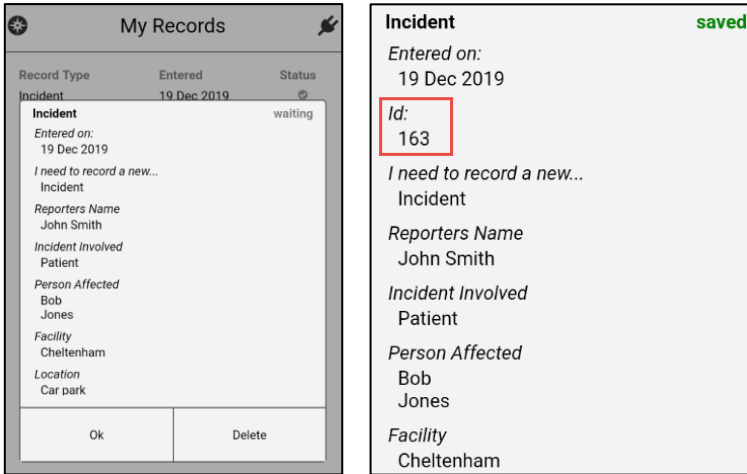

Deleting Records

Deleting records will not delete that record from the RiskMan system it has been sent to. It will only delete the record from your view in Roam if it has been submitted, the green tick. If the record still has a grey tick and you delete the record, it will delete the record from Roam and will not submit it to the RiskMan system.

To delete a record, whilst logged in

❶ Click the record you want to delete in the **My Records** Page

❷ Click **Delete**

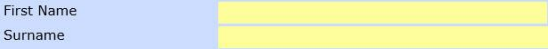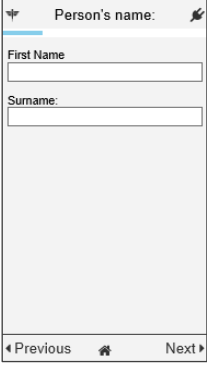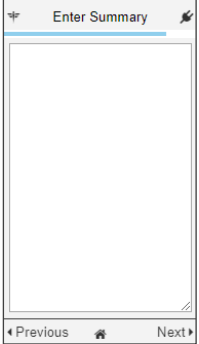The record will be deleted and removed from your **My Records** list.
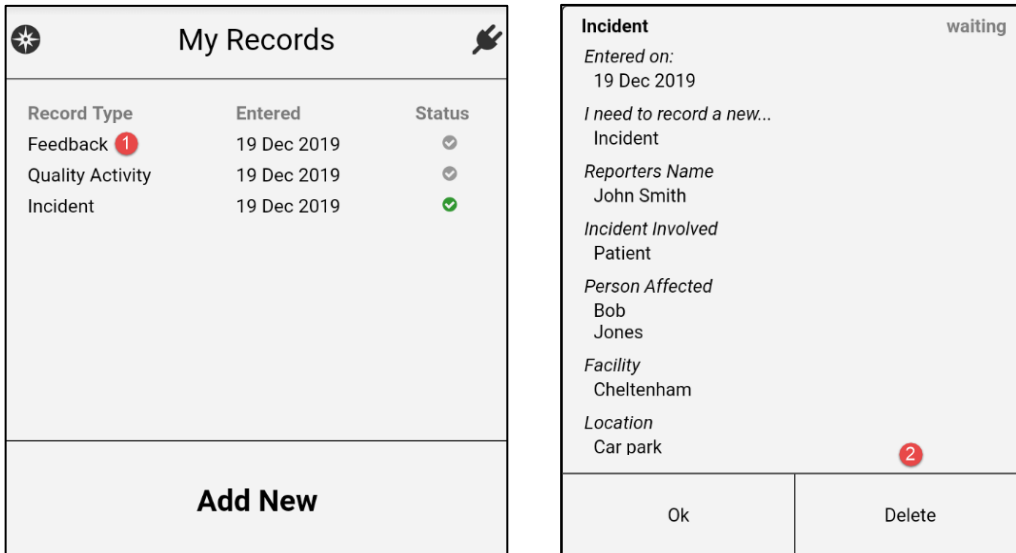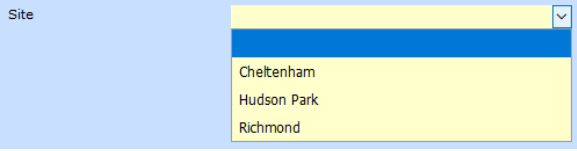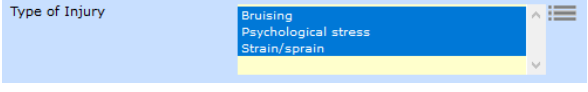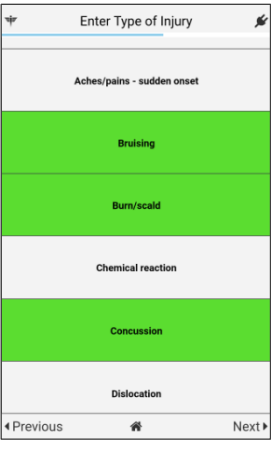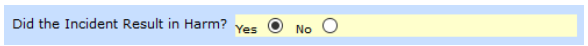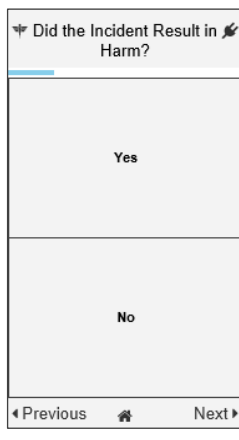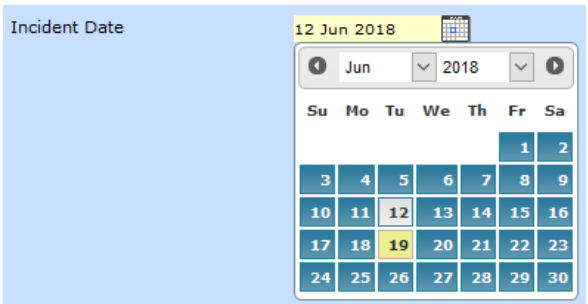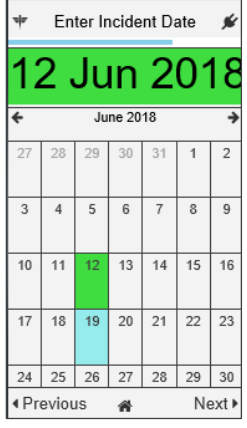
Two scenarios for you to consider. The first scenario is, if the record has yet to be submitted into the RiskMan system (Grey tick), it will delete the record and it will not be submitted.
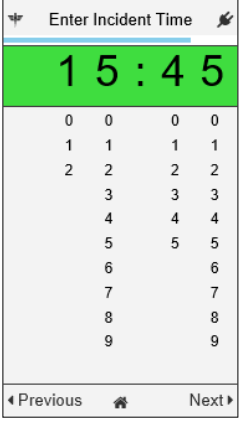
If the record has been submitted (Green tick) it will only be deleted from you Roam app. It will still be available to you and those with permission in the RiskMan system.
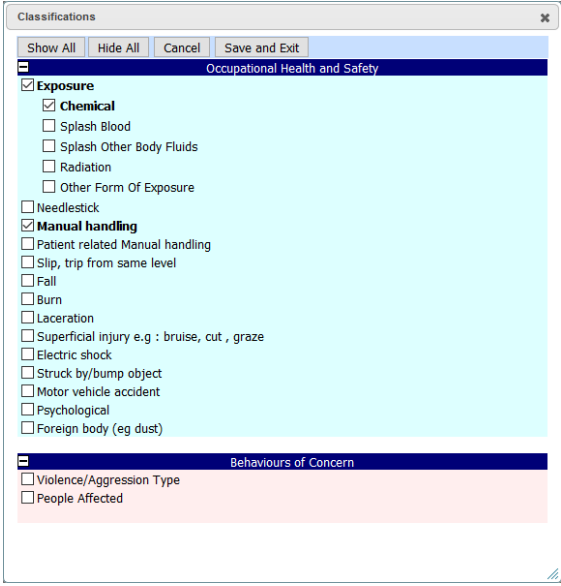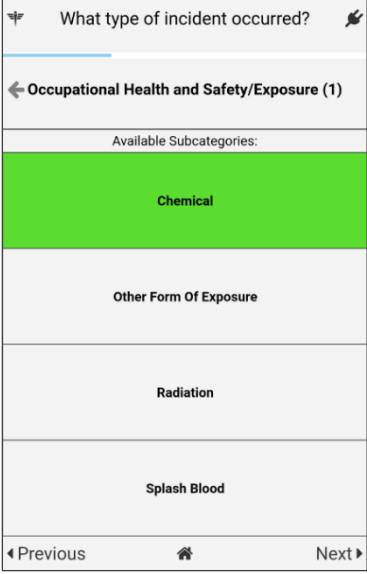
What do fields look like in Roam?

Your System Administrator has the ability to determine the path you will complete to enter a record. The fields listed below are examples of how they may appear to you.

FIELD TYPE	HOW IT LOOKS IN RISKMAN	HOW IT LOOKS IN ROAM
Free text		
Text area		
Drop down list		

Multi-select	Type of Injury — Bruising / Psychological stress / Strain/sprain	Enter Type of Injury — Aches/pains - sudden onset, Bruising, Burn/scald, Chemical reaction, Concussion, Dislocation
Yes / No and radio buttons	Did the Incident Result in Harm? Yes ● No ○	Did the Incident Result in Harm? — Yes / No
Date	Incident Date 12 Jun 2018 — calendar Jun 2018	Enter Incident Date — 12 Jun 2018, June 2018

Time	Incident Time 15:45 🕐	Enter Incident Time 1 5 : 4 5 0 0 0 0 1 1 1 1 2 2 2 2 3 3 3 4 4 4 5 5 5 5 6 6 7 7 8 8 9 9 ◀ Previous 🏠 Next ▶

Classification	Classifications ✕
	[Show All] [Hide All] [Cancel] [Save and Exit]
	Occupational Health and Safety
	☑ **Exposure**
	  ☑ **Chemical**
	  ☐ Splash Blood
	  ☐ Splash Other Body Fluids
	  ☐ Radiation
	  ☐ Other Form Of Exposure
	☐ Needlestick
	☑ **Manual handling**
	☐ Patient related Manual handling
	☐ Slip, trip from same level
	☐ Fall
	☐ Burn
	☐ Laceration
	☐ Superficial injury e.g : bruise, cut , graze
	☐ Electric shock
	☐ Struck by/bump object
	☐ Motor vehicle accident
	☐ Psychological
	☐ Foreign body (eg dust)
	
	Behaviours of Concern
	☐ Violence/Aggression Type
	☐ People Affected
		What type of incident occurred?
		
		← **Occupational Health and Safety/Exposure (1)**
		
		Available Subcategories:
		
		Chemical
		
		Other Form Of Exposure
		
		Radiation
		
		Splash Blood
		
		◀ Previous 🏠 Next ▶

Record Entry

If you can use Facebook or Instagram, you can use Roam. The Roam app behaves just like any other.

The first screen that you will always see is the "**I need to record a new….**".

Depending on permissions is depending on what registers you will see. Likely, you will only see Incidents. If you have permission to Incidents and Feedback for example, it will display both. If you're a user of both Incident and Feedback, there is the possibility you may on see one or the other. It just means that Roam has only been built for one register at that time or will not be utilised for the one you can see.
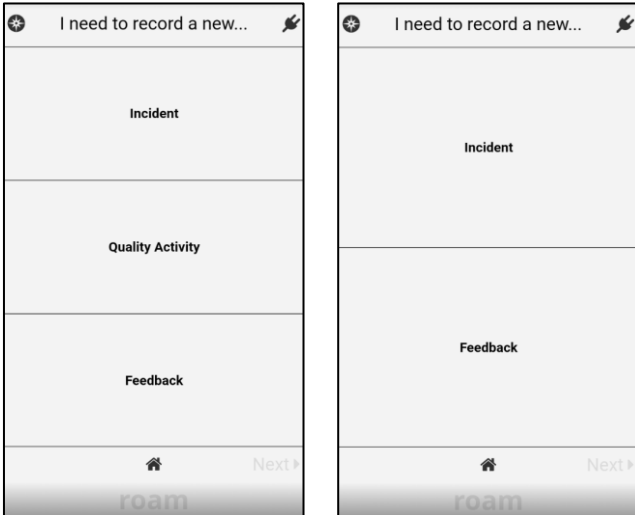
## Moving through the record

Whilst working through your record, you can navigate to the **Next** path or **Previous** path.

The **Next** button will not illuminate unless you have made a selection from the page you want to navigate from if the field is mandatory. If not mandatory, it will display for you to be able to navigate from this page without entering any detail into that section.
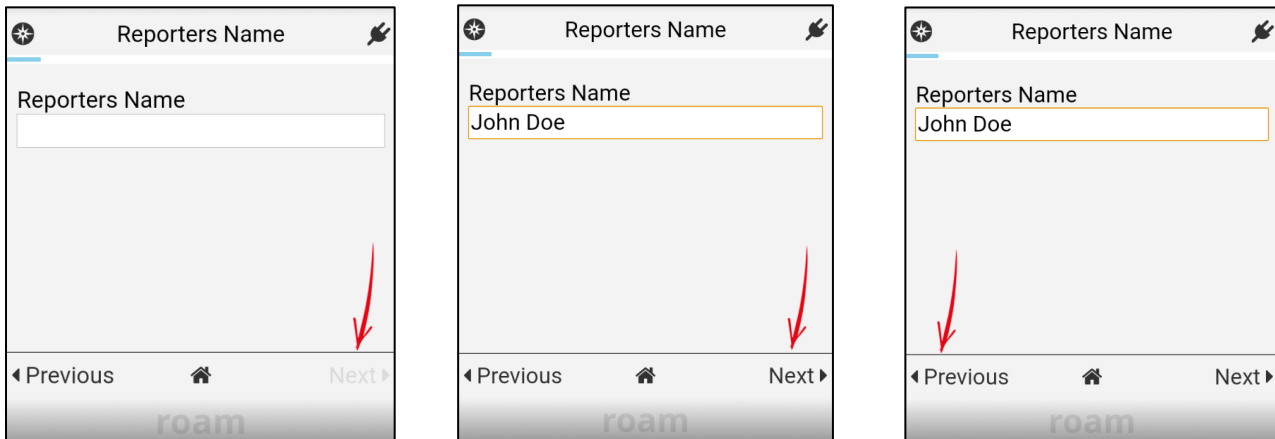
Record Progress

As you move through the path, it will display a progress bar to give you an idea of where you're at within the path and how far you have got to go to complete the record.
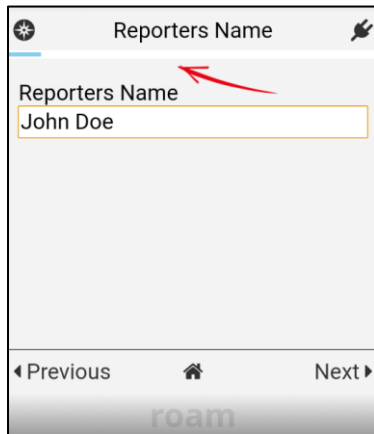
The Home Button

To return to the **My Records** page, click the button. Be mindful, if you have a record that has not been submitted, you will not retain the detail you have entered. You will be presented with a warning to remind you of this and you will need to conform that you want to proceed navigating away from the page.

Confirm Details Before Submitting

Once you have completed all fields, a confirmation page will display. Review your information that you have completed to ensure it is correct then click **Submit**.

Once you have submitted a record, you will be able to access the record in the RiskMan system to be able to make any edits or changes.

Authenticate Your Details

Depending on the setting in Roam, you may be asked to Authenticate your log in details. Times may vary depending on your organisation's settings. This is for security purposes.

Roam Settings and User Management

The Cog

The **Cog** ⚙ icon in the top left-hand corner displays information about your Roam app and allows management of the app.

Roam

Version: 1.0.55 - 1

Copyright 2016 Riskman Intl

Build: 100009 - 1 for 10000

Web service version: 0

Generic ROAM - Development

❶	Ok
❷	Get Latest
❸	Import Now

⚙	My Records	🔌
Record Type	**Entered**	**Status**
Incident	19 Dec 2019	⊘
Incident	19 Dec 2019	✅
Feedback	19 Dec 2019	✅
Quality Activity	19 Dec 2019	✅
Incident	19 Dec 2019	✅

❶ **OK:** Closes the dialog box

❷ **Get Latest:** Updates the latest version of the Roam app

❸ **Import Now:** Any records that have not imported into the RiskMan system (Grey tick) will be imported to the RiskMan system. You don't have to wait for it to automatically process. For the import to work, you need to be connected to a network

App Settings

The **Settings** 🔌 icon in the top right-hand corner displays information about your Roam app and allows management of the app.

Connection: active (WIFI)

Device ID: d04037cadea1c005

Signed in as: Lauren Haupt

Service URL:
https://sites.riskman.net.au/Generic_ROAM_WebSer

| Ok |
| Sign Out |
| Exit App |

⚙	My Records	🔌
Record Type	**Entered**	**Status**
Incident	19 Dec 2019	⊘
Incident	19 Dec 2019	✅
Feedback	19 Dec 2019	✅
Quality Activity	19 Dec 2019	✅
Incident	19 Dec 2019	✅

❶ **OK:** Closes the dialog box

❷ **Sign Out:** Logs the current user out of the session

❸ **Exit App:** This will close the app down and any tasks that are being completed in the background will stop. This feature is only available for Android devices. For Apple devices, it's the same as and "swiping up" to close your apps