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Introduction

This reference guide is aimed at Managers or Administrators who will be responsible for managing the User Templates in RiskMan. This guide is used in conjunction with the respective **RiskMan User Permissions Descriptions Guides** which can be accessed from *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

CRLDatix[®] RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES What are User Templates?

User Templates define the field settings, user permissions and in some cases restrictions a user will have access to in RiskMan. Each user will be assigned a user template in the Registers that they have permission to e.g. Incidents, Feedback, Risks or Quality Activities Users who self register in RiskMan will automatically be assigned the basic level template "**Default**" against the General and Register as well as any other Registers they are automatically granted permission to e.g. Incidents, Risk, and Quality Activities. In some organisations a user may only have permission to the Risk Register and/or Quality Activity Register once the Administrator has activated them under those specific User Profiles The templates created under any of the tabbed sections of the User Templates are unique to that Register; so a user can be assigned a different template in their Register specific User Profiles **Note: The "Default**" template cannot be renamed or removed from the Template list. This template is

usually assigned at the staff entry level. If self registration is turned on in your RiskMan, any user who self registers will be assigned the 'Default' template in the applicable Registers

How do I create a new Template?

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

🤹 💿 My Workspace Management Administration Reports Help Log Out	USER: System Manager (Manager)
General Incident Quality Activity Risk Feedback	
User Templates (General)	
Select Template: Note: Users counts include Feedback. Save Template:	plate New Template Delete Template

The User Templates page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risks, Quality Activities; 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 Templates are used to assign User permissions that are common across all Registers and the Administrative Permissions. Individual Templates are created under each of the Register tabs and are independent of each other.

This means that

 If you create an Accountable Executive template under the Risk tab, this template name will not be available under any of the other Register tabs. If you want this template available under one or more of the other Registers you will need to create it under the respective Register

• If you create a **Line Manager** template under the **General** tab, it will not be available under any of the Register templates unless it is created under these

Each template will comprise some or all of the following sections

- **Template Identification** Name of the template; ability to base a template on an existing one; nominated start page (the page a user sees when they first logon to RiskMan)
- **Restriction Details** Entry/Update and Reporting Restrictions that are common throughout the Registers e.g. Region/Site & Campus/Location restrictions. Selection from this section will only be saved for templates under the General tab
- **Specific Restrictions** (<u>not available</u> under the **General** tab) Entry/Update and Reporting Restrictions that are specific to that register e.g. Journal Type Restrictions
- Field Settings (not available under the General tab) Specifies the status of a field e.g.
 Don't Display, Entry Required, Read Only, Optional Entry on a specific Register.
- User Permissions Specifies the users' permissions that are either common across all registers e.g. Administrative permissions (this is done under the General tab) or specific to a Register

To create a Template

- 1. Click on the **Register 1** tab you want to create the template under e.g. **General**
- 2. Press the New Template 2 button

	_	
General Incident Risk Feedbac	:k	
	User Templates (General)	0
Select Template: New Template	▼	Save Template New Template Delete Template
		Base this template on:
Template Identification		
Template Name (User Type): Default As you are editing an existing template, you cannot char	ge the name.	4 Start Page: Incident Entry 🗸
		
Restriction Details (All restriction	s in this section are shared between all modules.)	
No Restrictions in this area have any selected items.		٨
Entry/Update Restrictions Facility Restriction:	Location Restriction:	
Cabell Huntington	·	
	-	
	Filter List	
Reporting Restrictions		
Facility Restriction:	Location Restriction:	
A A	A	
Cabell Huntington Acacia Private		
Eucalyptus Lodge test'test		
Wattle Private		
Begonia Day Surgery No one		
Riverside	-	
	Filter List	
Aggregate Restriction:	Specialty Restriction:	Service Restriction:
A		A
Administrative Services Ambulatory & Community Services	Acute Aged Care Service Allergy, Immunology & Respiratory	Aged Care Services. Aged Psychiatry Services.
carpark	Anaesthetics BES	Allied Health
Finance Human Resources	Burns	Anatomical Pathology Biomedical Engineering
Information Technology Services Medical Services	Cardiology Cardiothoracic surgery	Cardiovascular & Respiratory Directorate Community and Ambulatory
Nursing Services	Clinical Haematology	Emergency Medicine
Psychiatry	Colorectal and General Surgery 👻	Engineering

Example: Creating a template under the General Tab

- 3. Enter the name of your template in the Template Name (User Type) ⁶ field
- If the template is to be based on an existing template, select the template from the Base this template on ④ list

The **Restriction Details** (only under the General tab), **Specific Restrictions** (where applicable), **User Permissions** and **Field Settings** (where applicable) of that template will be applied to your new template

 If you are creating a template under the **Incident** or **General** tab, you will have the option to select the default **Start Page** ⁽⁴⁾ the user will see when they first logon to RiskMan if they are

assigned to this template e.g. for Line Managers this might be the "Entered Incidents" page; for Executives this might be the "My Reports" page; for Risk Managers this might be the "Inbox" page

6. For all Registers except for the General tab, the Restriction Details S will not be saved with the template. If you apply these restrictions under the General Tab and that template is applied to a user in the User Profiles, that user will be restricted across <u>ALL</u> Registers. In most cases these restrictions will be applied at the User profile level. If you do want to include these restrictions in the General User Template the following describes the restrictions:

Entry/Update Restrictions: If the users on this template can only enter or update Register items based on Region/Site and/or Campus/Location restrictions, select accordingly. To select more than one item in a list hold your **CTRL** button and click on the list items

Reporting Restrictions: If the users on this template have access to running Register Reports based on Region/Site and/or Campus/Location restrictions, select accordingly. To select more than one item in a list hold your **CTRL** button and click on the list items

For Register Templates only, are there any Specific Restrictions

 applied to the users on this template. If so highlight as required

Restriction Details 6	(All restrictions in this section are shared between all modules.)	
No Restrictions in this area have any selected items.		۲
Entry/Update Restrictions Facility Restriction:	Location Restriction:	
Cabell Huntington		
Reporting Restrictions	Filter List	
Facility Restriction:	Location Restriction:	
Cabell Huntington Acacia Private Eucalyptus Lodge test'test Wattle Private Begonia Day Surgery No one Riverside	* *	
	Filter List	
Aggregate Restriction:	Specialty Restriction:	Service Restriction:
Administrative Services Ambulatory & Community Services carpark Finance Human Resources Information Technology Services Medical Services Nursing Services Psychiatry	 Acute Aged Care Service Allergy, Immunology & Respiratory Anaesthetics BES Burns Cardiology Cardiothoracic surgery Clinical Haematology Colorectal and General Surgery 	Aged Care Services. Aged Psychiatry Services. Allied Health Anatomical Pathology Biomedical Engineering Cardiovascular & Respiratory Directorate Community and Ambulatory Emergency Medicine Engineering

Example: Specific Restrictions for the Incident Templates

6 ific Restrictions	(Restrictions in	this section are specific to the reg	Bulk Actions Save Template N	ew Template Delete Template
<u>y/Update Restrictions</u> Show only "Alerted" Qualit Act	y items in Inbox. ② ivity involved Restriction:			
Quality Improv Standards Con Audit / Survey Audit / Survey	npliance Scheduler	*		
(Sub-report) A (Sub-report) C (Sub-report) E (Sub-report) F (Sub-report) F	vidence indings		lask Further Action Internal Notification Correspondence Received Correspondence Sent	

Example: Specific Restrictions for the **Quality Activity** Templates

Specific Restric	tions 6 (Restrictions in this section	e specific to the register.)	
Entry/Update R	estrictions "Alerted" Risk items in Inbox. Risk Level Restriction: Enterprise Risk	ß	
Reporting Restr	rictions "Alerted" Risk items in Reports. Risk Level Restriction: Enterprise Risk Local Risk Project Risk		
	Restrict to these Reports: (Sub-Report) Actions A4L (Sub-Report) Associated Incidents A4L (Sub-Report) Catalysts A4P (Sub-Report) Catalysts A4L (Sub-Report) Consequences A4L (Sub-Report) Consequences A4P (Sub-Report) Controls A4L (Sub-Report) Source of Assurance A4L (Sub-Report) Custom Report	Restrict to these Journal Types: General Comments Action Required Risk Review Control Review Discussion with Insurer	

Example: Specific Restrictions for the Risk Register Templates

Specific Restricti	ons 6 (Restrictions in this section	on are specific to the register.)		
Entry/Update Re	strictions			
Show only "	Alerted" Feedback items in Inbox. 📀			
	Type of feedback Restriction:			
	Complaint Compliment Suggestion	•		
		v		
Reporting Restri	<u>ctions</u>			
Show only "	Alerted" Feedback items in Reports.			
	Type of feedback Restriction:			
	Complaint Compliment Suggestion	•		
		-		
	Restrict to these Reports:		Restrict to these Journal Types:	
	(Sub-Report) Actions (Sub-Report) Associated Risks (Sub-Report) Feedback Items (Sub-Report) Journal Actions (All) Actions (Completed) Actions (Not Achievable)		Action'required Correspondence File Notes	
	Actions (Open) Actions (Overdue)	-	~	

Example: Restriction Details for the **Feedback** Templates.

For each Register

- Highlight the specific Entry/Update or Reporting field restrictions that relate to that Register Template
- Show Only "Alerted" <Register> In Inbox: This option should <u>only</u> be checked if the users on this template have access to the respective Register Inbox (e.g. Risk/Quality Managers, Consumer Advocates) and should only see the respective Register items they have been alerted to
- Show Only "Alerted" <Register> In Reports: This option should only be checked if the users on this template have access to the respective Register Reports (e.g. Risk/Quality Managers, Executives, Line Managers) and should only report on the Register items they have been alerted to

Note: Care should be taken when adding restrictions as they may be different for individual users on this template. These restrictions can be done via the User Profiles. However, if restrictions are included in a template, when applying templates in the User Profiles page, <u>ONLY</u> the respective "**Restrict to these Reports**" and "**Restrict to these Journal Types**" restrictions will be applied. To update the other restrictions for users on that template you will need to use Apply Template Changes. Refer to the section "**How do I apply changes to templates to all users on a template**"

- For each Register template (not applicable to General), you will be required to specify which fields a user assigned to that template is required to complete, based on their role within your organisation. Fields can have one of 4 statuses
 - Don't Display Not required in this template
 - Entry Required Mandatory for users on this template to enter/select data into this field
 - Optional Entry Optional for users on this template to enter/select data into this field
 - **Read Only** Visible for users on this template for information purposes only. The user will not be able to enter or edit data in this field

If all fields in a specific section are not required, click on the "Hide <section name> section" (3) check box

AAnonymous?	Entry Require 💙		
HWho is providing the feedback?	Dont Display Entry Required N	AOrganisation name	Entry Require 💙
AClient ID number	Optional Entry 🛷 Read Only		
A First name	Entry Require V	Asurname	Entry Require 💙
ADate of birth	Optional Entry 🗙		
AGender	Optional Entry 🗙		
AGender - portal field	Dont Display 🗸		

Who or What Was Affected?			
AIncident involved	Entry Require 🗸 🕖		
AWho is affected?	Optional Entry 💙		
AClient ID number	Entry Require 💙		
AType of worker	Entry Require 💙		
AType of employment	Entry Require 💙		
APartner organisation	Entry Require 💙		
Coccupation	Entry Require 💙		
A First name	Entry Require 💙	AInitials	Dont Display 🗸
ASurname	Entry Require 💙		
AIs this client a minor?	Entry Require 💙		
ADate of birth	Optional Entry 💙	Age	Dont Display 🗸
Gender	Entry Require 💙		Ŧ

Example: Field Settings for an Incident Template

Rerson providing feedback			8
			Hide Person providing feedback Section: 🗌
BAnonymous?	Entry Require 💙 🍞		
AWho is providing the feedback?	Entry Require 💙	AOrganisation name	Entry Require 💙
AClient ID number	Optional Entry 🗸		
AFirst name	Entry Require 🖌	ASurname	Entry Require 💙
ADate of birth	Optional Entry 💙		
Agender	Optional Entry 💙		
ÅGender - portal field	Dont Display 💙		
Repreferred mode of contact	Optional Entry V		
Address	Optional Entry 🗸 😡		
ASuburb / City	Optional Entry 🗸		
Astate	Optional Entry 🗸		

Example: Field Settings for a Quality Activity Template

A Details			8
			Hide Details Section:
ARisk Name ASummary Description	Optional Entry V Optional Entry V		
<u>Status</u>			
ARisk Status	Optional Entry 🗸		
ADate Opened	Optional Entry 🗸	ANext Review Date	Optional Entry
A Reminder Period	Optional Entry 🗸	A Reminder Date	
ADate Closed	Optional Entry 💙		

Example: Field Settings for a Risk Register Template

Rerson providing feedback			8
			Hide Person providing feedback Section:
Anonymous?	Entry Require 💙 🍞		
HWho is providing the feedback?	Entry Require 💙	HOrganisation name	Entry Require 💙
AClient ID number	Optional Entry 💙		
AFirst name	Entry Require 🖌	ASurname	Entry Require 🖌
ADate of birth	Optional Entry 🗸		
RGender	Optional Entry 💙		
AGender - portal field	Dont Display 💙		
APreferred mode of contact	Optional Entry 🗸		
Address	Optional Entry 🗸 나		
ASuburb / City	Optional Entry 🗸		
Astate	Optional Entry 🗸		

Example: Field Settings for a Feedback Template

 For the fields that involve sub-forms e.g. the Controls on the Risk Template; to set the field settings for the fields in these sub-forms, you will need to click on the respective "Edit RR Controls Permissions" button (refer to example below)

6 Controls							
Edit RRControls Permissions							
Riskman Page Webpage Dialog	al al casa						
			Save				
Controls							
Describe the processes, policies a Control is expected to reduce this			r reduce this Risk. Identify how the				
Contro	Optional		-				
Control Hierarchy	Optional •	Effective Date	Optional 👻				
Control Cost	Optional 🔹						
Last Reviewed By	Optional -	Last Reviewed By(username)	Optional 👻				
Last Reviewed Or	Optional						
Assessment	Optional 🗸						
Next Review By	Optional •	Next Review By(username)	Optional 👻				
Next Review On	Optional 🗸						

10. For the Register Templates under the **User Permissions 9** section is a list of categorised permissions to RiskMan.

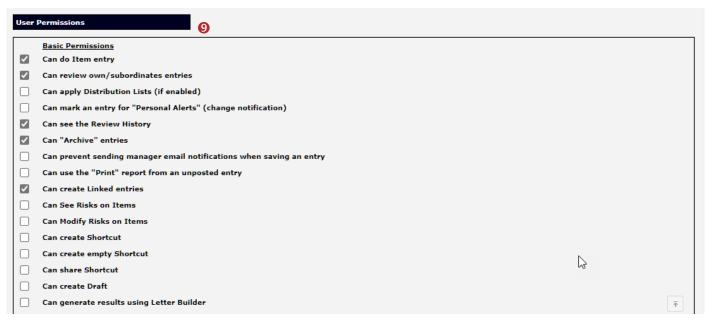
The User Permissions under the General tab are permissions that are either non-Register specific e.g. Administrative Permissions or permissions common across all registers e.g. can bookmark entries

The User Permissions under the individual register tabs will be Register specific **Note:** A description of these permissions is available in the respective RiskMan User Permissions Description Guides.

User Permission

User	Permissions 9	
	Basic Permissions	
	Can "Bookmark" entries	
	Can view Reminders	
	Can use the "Contact Riskman" (developers) link on the Help menu	
	Can edit own Line Managers	
	Can bypass manager selection	
	Can Not be the target of a Distribution List on item entry	
	Can Not be selected as their Manager by a user	
	Can see personal email log on menu	
	<u>MyDetails</u>	
	Can change own password.	
	Can modify own sites (if enabled in Global Settings)	
	Can change display name	
	Can change contact number	
	Can change mobile number	
	Can change email address	
	Can change alternate email address	
	Can change own position	

Example: User Permissions under the General tab



Example: User Permissions under the Incident tab

User	Permissions 9	
	Basic Permissions	
	Can do Item entry	
	Can review own/subordinates entries	
	Can apply Distribution Lists (if enabled)	
	Can mark an entry for "Personal Alerts" (change notification)	
	Can see the Review History	
	Can "Archive" entries	
	Can prevent sending manager email notifications when saving an entry	
	Can use the "Print" report from an unposted entry	
	Can create Linked entries	3
	Can create Shortcut	
	Can create empty Shortcut	
	Can share Shortcut	
	Can create Draft	
	Can generate results using Letter Builder	

Example: User Permissions under the Quality Activity tab

	Basic Permissions		
	Can do Item entry		
	Can review own/subordinates entries	N	
	Can apply Distribution Lists (if enabled)	63	
]	Can mark an entry for "Personal Alerts" (change notification)		
	Can see the Review History		
	Can "Archive" entries		
	Can prevent sending manager email notifications when saving an entry		
	Can use the "Print" report from an unposted entry		
	Can create Linked entries		
	Can create Shortcut		
	Can create empty Shortcut		
	Can share Shortcut		
	Can create Draft		
	Can generate results using Letter Builder		

Example: User Permissions under the Risk tab

ssions i entry own/subordinates entries istribution Lists (if enabled) in entry for "Personal Alerts" (change notification) Review History e" entries
own/subordinates entries istribution Lists (if enabled) n entry for "Personal Alerts" (change notification) Review History
istribution Lists (if enabled) n entry for "Personal Alerts" (change notification) Review History
n entry for "Personal Alerts" (change notification) Review History
Review History
e" entries
sending manager email notifications when saving an entry
"Print" report from an unposted entry
inked entries
ks on Items
Risks on Items
Shortcut
empty Shortcut
hortcut
Draft

Example: User Permissions under the Feedback tab

11. To save the template, press **Save Template**

CRLDatix[®] RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES How do I modify an existing template?

To modify an existing template select Administration -> User Permissions -> User Templates page

- 1. Select the **Register tab 0** you wish to modify
- 2. Select the template from the Select Template 2 list
- 3. Modify the template as required
- 4. Press Save Template 8

Note: If you make a change to a template it will not automatically update all users on that template. To update all users on a template refer to the **"How do I apply changes to templates to all users on that template?"** section

General Incide	nt Quality Feedl	ack Risk					
		User Ter	nplates (Genera	il) 🚯			
Select Template:	Default (155 users)		~	Save Template	New Temp	Delete Tem	plate
				Base this tem	plate on:		~
Template Identification							
Template Name (User Type	e): Default ing template, you cannot chan			s	itart Page:	New Incident	~
As you are editing an exist	ing template, you cannot chan	ige the name.					
Restriction Details	(All restrictions	s in this section are shared	l between all modules.)				
No Restrictions in this area have a	any selected items.						۲
Entry/Update Restrictions							
Region	Restriction:	L	ocation Restriction:				
Community				*			
Corporate Integrated							
Residential							
	_			-			
	•						

CRLDatix[®] RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES How do I apply changes to templates to all users on that template?

Note: Available in September (2012) SR 11 or above

To apply the changes you have made to templates, navigate to the Administration -> User

Permissions -> Apply Template Changes page

- 1. Select the Register **0** the template was modified under
- 2. Check the templates 2 that you wish to update

Note: If the template does not exist in the list it means that there are no users assigned to that template

- 3. Check mark the sections **③** of the template that you modified
- Press the respective Apply the Template Changes 4 or Reset 4 button (depending on the Register page you have displayed)
 - All users on that template will be updated
- 5. Repeat steps 2-4 if you wish to apply different template changes to another template under the same Register
- 6. Repeat steps 1-4 if you wish to apply template changes under another Register

Gene	ral	Incident	Quality	Feedback	Risk		
0				Apply	Temp	ate Changes (General)	
	The purpose of this page is to allow you to copy settings for a specific user template to ALL users of that user type. Please note that any individual settings for items you select to copy will be lost, and the changes cannot be undone. You may make these changes as often as required. All changes are specific to the selected Register.						
	Access to this page should be restricted to RiskMan Administrators only.						
Reset in Hi PLEASE Adding	Def Def Def Exe Exe Sup Total us Selu dividual de 'Resi BE CAR	ons to RiskMan	:) Jsers)) ;s) anagers (4 User ;) ;; ; section. settings from t Administrators	his section can be may cause difficu	Ity adminis	to your setup. Modifying restrictions on Region specific users may allow privacy breaches. ttering RiskMan.NET, and would require developer correction.	
Restric	tions De	etails (Restricti	ons in this sectio	n are shared across	all registers	.)	
Entry/U	<u>Ipdate F</u>	<u>Restrictions</u>					
Reg	ion Res	triction:			Location I	Restriction:	
Report	Restrict	ions					
Reg	ion Res	triction:		Г	Location I	Restriction:	
		ation Restrictio	in:		-	ocation Restriction:	
Rese	Reset "Start Page" and "Password Doesn't Expire" settings:						
		lividual permiss all the tick boxe		n of the template	page where	e you give permission to allow people to do things.	
					Apply	4 the template changes.	
xamp	l e: A	pply Tem	plate Cha	anges page	for Ge	eneral	

Gene	eral Incident Quality Activity Risk Feedback						
	Apply Template Changes (Risk)						
The purp lost, and	The purpose of this page is to allow you to copy settings for a specific user template to ALL users of that user type. Please note that any individual settings for items you select to copy will be ost, and the changes cannot be undone. You may make these changes as often as required. All changes are specific to the selected Register.						
Access t	o this page should be restricted to RiskMan Administrators only.						
User Type:	Administrator (5 Users)						
Type:	CLO (1 Users)						
	Default (17 Users) 2						
	Manager (1 Users)						
	OHS Template with posting (1 Users)						
Poset in	Total users: 25 lividual restriction settings:						
	innual restriction settings: BE CAREFUL. Selecting settings from this section can be dangerous to your setup. Modifying restrictions on Site specific users may allow privacy breaches. Adding restrictions to RiskMan						
	rators may cause difficulty administering RiskMan.NET, and would require developer correction.						
Selecting	the settings below will make all users (of the type selected above) adopt those settings from the template.						
Specif	ic Restrictions (Restrictions in this section are specific to the register.)						
Entry/	Update Restrictions						
Sh Sh	ow only "Alerted" Risk items in Inbox: 😰						
Ris	k item Involved Restriction:						
Report	Restrictions						
Sh	ow only "Alerted" Risk items in Reports: 🥝						
	k item Involved Restriction:						
Re Re	strict to these Reports:						
Journa	Type Restrictions						
Re Re	strict to these Journal Types:						
E Re	set all individual field settings: s means all the fields on the template form where you can say "Don't Display", "Mandatory" etc.						
	set all individual permission settings: s means all the tick boxes at the bottom of the template page where you give permission to allow people to do things.						
Apply	the template changes.						

Example: Apply Template Changes page for Risk

B

General Incident Quality Activity Risk Feedback							
Apply Template Changes (Incident)							
Apply reliplate changes (incident)							
The purpose of this page is to allow you to copy settings for a specific user template to ALL users of that user type. Please note that any individual settings for items you select to copy will be lost, and the changes cannot be undone. You may make these changes as often as required. All changes are specific to the selected Register.							
Access to this page should be restricted to RiskMan Administrators only.							
User Administrator (5 Users)							
CLO (1 Users)							
Code Blue (1 Users)							
Default (4400 Users)							
Distribution (230 Users)							
Line Manager (358 Users)							
Manager (1 Users)							
 OHS Template with posting (1 Users) Other Manager (87 Users) 							
Risk Manager (2 Users)							
SuperUser (16 Users)							
Total users: 5102 Reset individual restriction settings:							
PLEASE BE CAREFUL. Selecting settings from this section can be dangerous to your setup. Modifying restrictions on Site specific user	s may allow privacy breaches. Adding restrictions to RiskMan						
Administrators may cause difficulty administering RiskMan.NET, and would require developer correction.							
Selecting the settings below will make all users (of the type selected above) adopt those settings from the template.	Selecting the settings below will make all users (of the type selected above) adopt those settings from the template.						
Specific Restrictions (Restrictions in this section are specific to the register.)							
Entry/Update Restrictions							
Show only "Alerted" Incident items in Inbox: 💿							
Incident item Involved Restriction:							
Report Restrictions							
Show only "Alerted" Incident items in Reports: 🕗							
_							
Incident item Involved Restriction:							
Incident item Involved Restriction: Restrict to these Reports:							
Restrict to these Reports:							
Restrict to these Reports:							
Restrict to these Reports: Journal Type Restrictions Restrict to these Journal Types:							
Restrict to these Reports: Journal Type Restrictions Restrict to these Journal Types: Reset all individual field settings: Reset all individual field settings: Reset all individual permission settings:							
Restrict to these Reports: Journal Type Restrictions Restrict to these Journal Types: Reset all individual field settings: This means all the fields on the template form where you can say "Don't Display", "Mandatory" etc.							

Example: Apply Template Changes page for Incidents

to copy will be lost, and the changes cannot be undone. You may make these changes as often as required. All changes are specific to the selected Register
Access to this page should be restricted to RiskMan Administrators only.
Default (33 Users)
Executive (5 Users)
Manager (112 Users) 2
Portal (1 Users)
Quality & Safety Managers (3 Users)
SuperUser (18 Users)
otal users: 172
Select All
vidual restriction settings:
w 'Restrictions' reset section.
all individual field settings: neans all the fields on the template form where you can say "Don't Display", "Mandatory" etc.
all individual permission settings: neans all the tick boxes at the bottom of the template page where you give permission to allow people to do things.

Example: Apply Template Changes page for Feedback

B

CRLDatix[®] RISKMAN QUICK REFERENCE GUIDE TO USER TEMPLATES How do I delete a template?

User Templates can be deleted from the User Templates page provided there are no active, expired or deleted users assigned to that template. If a user is assigned to a template that is to be deleted, it will be necessary to

- 1. Locate the user in the respective User Profiles Register
- 2. Assign them to another template
- 3. If the user assigned to the template that is to be deleted is a deleted user, it will be necessary to
 - Undelete the user
 - Reassign a different template e.g. "Default" (as this template can never be deleted)
 - Save the user
 - Delete the user again

Note: For more information on how to modify or delete a User Profile, refer to the respective RiskMan User Management Guide (Network Logins) or RiskMan User Management Guide (Non-Network Logins)

Deleting a Template

To delete a template you will need to navigate to the Administration -> User Permissions -> User Templates page

- 1. Select the respective Register 0 page
- Select the template you wish to delete from the Select Template 2 list the number of users assigned to that template will display in the list

0	User T	emplates (Gen	eral)	
Select Template:		<u>k</u> 2	Save Template Ne	w Template Delete Template
	CD Default (155 users) Default+ (2 users) Default++ (1 users) Default+++ (1 users) DEMOtemplate (2 users) Executive (9 users) Manager (105 users) Portal Quality & Safety Managers (4 users) Superuser (5 users)			

If there are no users assigned to the template, press Delete Template 8

General	ent Quality Feedback	Risk		
	Use	er Templates (Genei	ral)	6
Select Template:	Manager (105 users)	~	Save Template New Template	Delete Template
			Base this template on:	~

General Incide	nt Quality Feedback Risk							
	User Templates (General)							
	The template 'TEST' has been deleted.							
Select Template:	· · · · · · · · · · · · · · · · · · ·	Save Template	New Template Delete Template					

Note: The template <u>will only</u> be removed from the respective Register.

3. If you delete a template with assigned users, a list of users assigned to that template will display and the template will not be deleted

General	incider	nt Quality	/ Feedback	Risk				
				User Tem	plates (Ge	neral)		6
Select Templa	te:	Manager (105	users)		~	Save Te	emplate New Template	Delete Template
						Base	e this template on:	~
General	nciden	Quality	Feedback	Risk				
	User Templates (General) 🗡							
	Unable to delete template 'MANAGER', because it has users assigned to it. These users are:							
Aaron Mclean (-	Delegate, Adam (n (Alexander.Tobin)	Amy Keys (Amy	
Angelica Molina (Select Template		.Molina j	Anthony Carn (An	thony.Carn)	Ash Simpsor	n (Ash.Simpson)	Barbara Trounson (Bar Template New Templa	

Bulk Actions

In the Templates users can be moved from one template to another in bulk. There are two functions available to move users. The **Move** function and the **Import** function.

Note: Bulk Actions are not available in the General register.

The Move function

The Move function will move ALL users from the current template to any other template in the **same** Register.

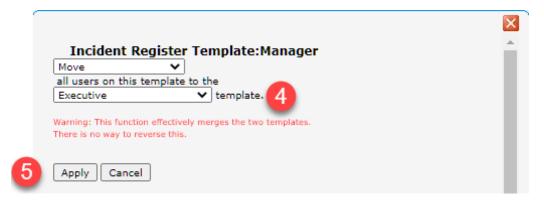
1. Select the Register 0

2. Click on the 2 Bulk Actions button

3. Choose ³ Move in the Select an Action here drop down list

1	
General Incident Quality	Feedback Risk
	User Templates (Incident) 2
Select Template: Manager (96 users)	Bulk Actions Save Template New Template Delete Template
	Base this template on:
Template Identification	
Template Name (User Type): Manager As you are editing an existing template, you ca	Incident Register Template:Manager Select an action here 3 Start Page: Review My Incidents
Restriction Details (/.	Apply Cancel
No Restrictions in this area have any selected items.	۲
Specific Restrictions (f	
Entry/Update Restrictions	
Show only "Alerted" Incident items in Int Incident Involved	
Client Partner Organisation Worker	•
Relative / Member of the Com	munity

4. Select the **4** Template that you want to move the users to





Incident Register Template:Manager	<u> </u>
Moved 96 users to the Executive 6	-
Apply Cancel	

6. There will be a confimation message to confirm the number of users that were moved **NOTE:** The Move action is not reversable.

The Import function

The Import function will move ALL users from ANY template in ANY Register into the chosen template in the Register you select.

- 1. Select the Register 0
- 2. Click on the 2 Bulk Actions button
- 3. Choose **S** Import in the Select an Action here drop down list

(1)						
General Inciden	nt Quality	Feedback Risk				
		User Template	s (Incident)	2		
Select Template:	Manager (96 users))	Bulk Actions	Save Template	New Temp	Delete Template
				Base this tem	plate on:	~
Template Identification						
Template Name (User Type) As you are editing an existi		Incident Register Template: Select an action here V	Manager		Ś	tart Page: Review My Incidents
Restriction Details	u.	Apply Cancel			Ш.	
No Restrictions in this area have an	ny selected items.					۲
Specific Restrictions	(F					
Entry/Update Restrictions						
Show only "Alerted" In	ncident items in Inb					
	Incident Involved					
Client						
Partner O Worker	Organisation				•	
	/ Member of the Com	munity				

- 4. Select the 4 Register that you want to Import the users from
- 5. Select the **S**Template in the previously selected register that you want import users from



6. Click the **G** Apply button

7. There will be a O confimation message to confirm the number of users that were moved **NOTE:** It is important to carefully consider the users that you are Moving or Importing. The action will be irreversible and if you need to reverse the Move or Import it will be a manual process where you assign EACH user a template permission one at a time.

		×
Incident F	egister Template:Default+++	A
Import	✓ all users from Register	
General 🗸		
🕖 who are on te	nplate Manager 🗸 🗸 🗸	
-	access to this register on this template.	
	already have an account in this register will not	
be affected.		
Apply Car	cel	
6		

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 📶 appears in front of the Label

H Who Was Affected?	
AIncident Involved	Entry Required 👻
🔏 First Name	Entry Required 👻
ASurname	Entry 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

To modify a field label

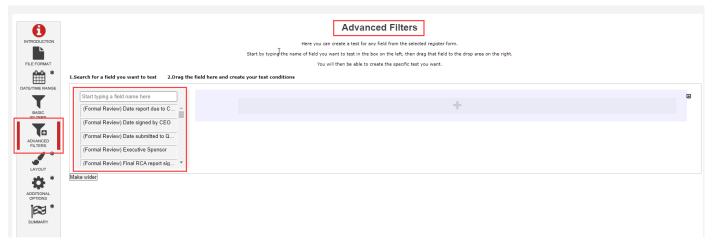
- 1. Ensure you have a template selected under the respective Register
- Click on the displays the Edit Field Detail panel:
- 3. Enter the label in the **New Title Text**

 field (this is the label that will be used on the data entry form)
- The **Report** title **③** determines what should be displayed when this field is utilised in Reports. The options below the label text include:
 - a. **Display:** Allows this field to be utilised in Reports

Summ A				Entry Requir		
A Details	5			Optional Ent	ry 💌	
lit Field Detai	I					
Entry Title 🕜	Details 2					×
Report Title 🕜	Details 3					
	Display 🕜	✓	Condition 🕜	Group 🕜		
Alert						
Title 🕜	Details 4					
	Display 🕜	✓	Condition 🕜	✓		
Advanced						
Post Cell 🕜			elling" src="image pellCheck(docume	s/spellcheck.gif" ent.getElementByld("[Detail"));">	$\hat{}$
			Gene	erate Post Cell from:	Choose Template	\checkmark
Script 🕜	onfocus="pa	irent.fn	PreSpellCheck(this	s);"		$\hat{}$
	ld 🕜			Class 🕜		

Note: The image above demonstrates the field this function relates to in the Customise Layout page

b. Condition: Allows this field to be chosen in Advanced Conditions for filtering purposes



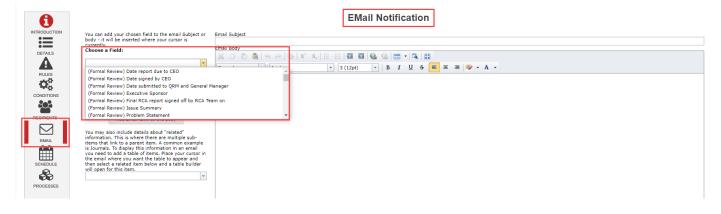
Note: The image above demonstrates the field this function relates to in the Reports page

c. **Group:** Allows this field to be chosen as a **Grouping** field when creating a **Custom Report Layout**. Note that free text fields should **not** be enabled for grouping

Groups	Group Fields	۲
Detail 🛨	(Formal Review) Executive Sponsor	
1 2 3	(Formal Review) Issue Summary	
1 1 1 1 1 2 1 1 3	(Formal Review) Problem Statement	
	(Formal Review) Review Conclusions	
	(Formal Review) Review Notes	
Sub-Reports	(Formal Review) Review Reference	
	(Formal Review) Review Status	
1.	(Formal Review) Review Team	
	(Formal Review) Review Title	
	Age	
	Age Group	
	Are Modified / Alternative Duties Required?	
	Are you reporting the incident on behalf of another person?	
	Body Part	
	Cause of injury	
	Client ID Number	1 -

Note: The image above demonstrates the field this function relates to in the Customise Layout page

- 5. The **Alert** title **4** determines what should be displayed when using this field in Alerts. The options below the label text include:
 - a. **Display:** Allows this field to be utilised in the email section of your Alerts page as highlighted below

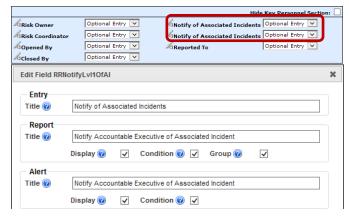


b. Condition: Allows this field to be used when creating Alert filter criteria as shown below

	Conditions Here you need to define the conditions which must be met in order for the alert to trigger. You can add as many conditions as necessary. The Test Conditions' button will tell you how many existing records there are which match the conditions you have added.							
	Please enter a Descriptive name for these conditions: Eg. Staff m		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~					
RULES CONDITIONS RECIPIENTS SCHEDULE PROCESSES	The focus of this alert is Just Incidents Start typing a field name here (Formal Review) Date report due to C (Formal Review) Date signed by CEO (Formal Review) Date submitted to Q (Formal Review) Executive Sponsor (Formal Review) Final RCA report sig Make wider		Select to add a related filter for 🛛 💌	Test Conditions				

Note: The properties in the **Advanced** section <u>should not be modified</u> except without the explicit guidance of RiskMan International

6. 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)



Example: "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form



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 Sit	e	>
Entry Title 🕜	*GS_SiteName	
Report Title @	*GS_SiteName	
	Display 🔞 🗸 Condition 🔞 🗸 Group 🔞 🗸	
Alert Title 🕜	*GS_SiteName	
	Display 🝘 🔽 Condition 🞯 🖌	

 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 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*
- 9. Press Save when complete

To modify a Section Title/Colour or Background Colour

1. Click on the kicon 1 next to the Section Title

Who or What Was Affected?		
AIncident involved	Entry Require 💙	
AWho is affected?	Edit Section 75	
Client ID number	tion	
AType of worker	e Who Reported the Incident? Fill #ff2925 Text #ffffff	
AType of employment	3 4	
Roccupation		
A First nave	Save Cancel Do	nt Display 😽

2. Modify the label in the **Current Section Title** ield (*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

To change the background colour and text colour of the section click on the respective colour box 6 & 4 , and a colour picker will display. Click your mouse to select your desired colour.

Note: At present, you cannot type the HEX code manually in order to designate an exact colour. Please contact RiskMan Support if you require a specific colour or colours to be used. Be careful with choosing colours. Make sure they complement each other. If you need assistance with colour matching please contact RiskMan Support - <u>https://hub.rldatix.com/SupportHUB/s/</u>

4. Press Save when complete

Who Reported the Incident?			
A Reporter's name	Entry Require 💙	A Reporter's position	Entry Require 🗸
Contact phone	Optional Entry 🗸		
${\cal B}_{ m Are}$ you reporting the incident on behalf of another person?	Entry Require 😡	Who are you entering this incident on behalf of?	Entry Require 🖌

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