RLDatix™

- List Page Reference -

FOR RISKMAN VERSION 2406

Last reviewed June 2024

CONTENTS

WHAT IS A LIST PAGE?

List pages are views in Riskman where you see a list of records.

List Pages can be accessed from the main navigation menu:

1. My Workspace > Review My > (register name i.e. Incidents)

2. Management > Inbox > (register name i.e. Incidents)

3. Management > Enquiry > (register name i.e. Posted Incidents)

4. Management > All Incidents & other register views
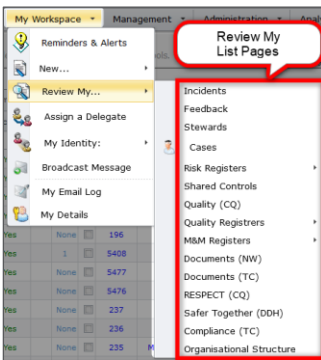
1. My Workspace **2. Inbox** **3. Enquiry** **4. Other register views**
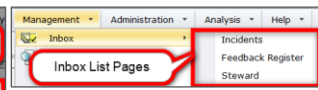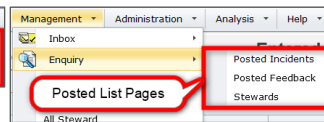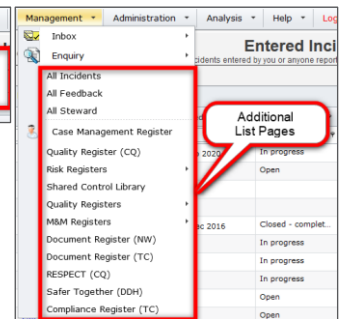
The number of List Pages that a user will see in their menus will depend on the number of Registers that your site has and the permission level of the user viewing the menus.

List Page Reference

Each List page has the Selection Setting menu.
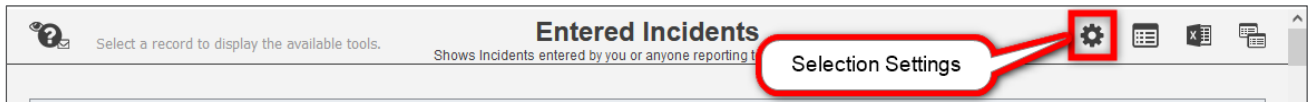
Selection Settings give the user access to eight different List pages via the Display drop down list:

1. Inbox (Incidents)
2. Deleted Incidents
3. Accepted Incidents
4. All Incidents
5. Posted Incidents
6. Entered Incidents
7. Newly Assigned Incidents
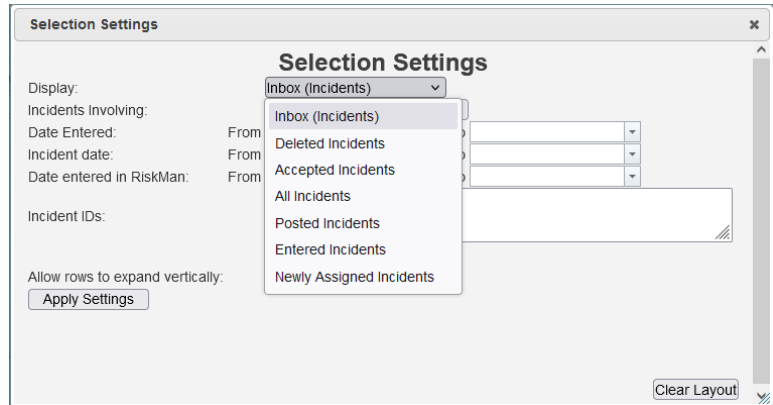
8. Archived Incidents
   *This Selection Settings option is only available from the **Entered Incidents** Display view.*
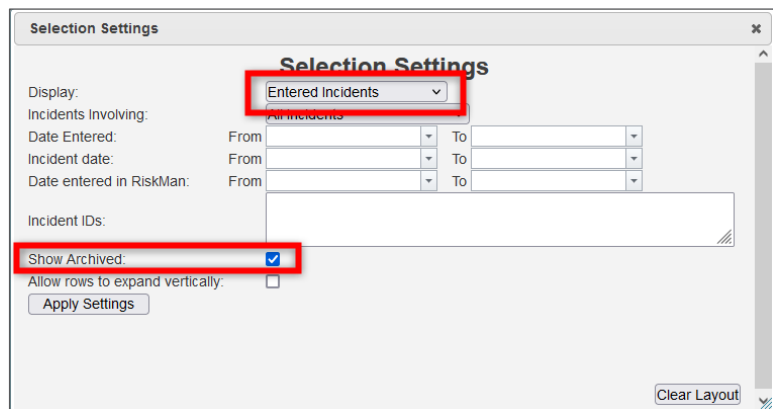
List Page Reference

The Following is an image of each List page header and gives a description of the type of records that are displayed in that view.

Inbox view page

When auto-posting is *turned off* in the Global Settings, all Incidents that are submitted will be displayed the **Inbox** view page. Incidents in the Inbox are un-posted and are not yet available to the Reports modules. These unposted incidents are considered "drafts" that have not yet been accepted and written to a "posted" master record. Every time there is an edit or change to an incident record a new version will be written to the Inbox. When you view the record, you can see the number of versions in the **Control Panel**.

Deleted Incidents view page

Displays all Incidents that are marked as deleted in the register. Deleted incidents will **not** be visible in any of the other list page views except **All Incidents**, **Entered Incidents**, and **Archived incidents**.

Accepted Incidents view page

Displays all Incidents that have a Posted (master record) and Inbox (draft) versions as well. When opened the record shown is the Posted version with the option to view the Unposted (draft) record that Posted version is based on.

All Incidents view page

Displays all Incidents that exist in the register, posted or unposted (not including those marked as Deleted).

Posted Incidents view page
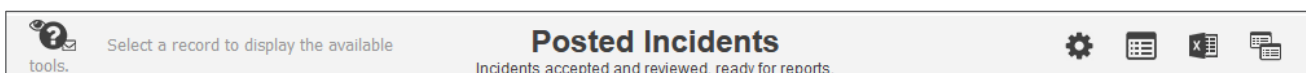
Displays all Incidents that have been Accepted and Reviewed. Posted Incidents are written to the master record. Posted Incidents are made available to the Reports modules.

Entered Incidents view page

Displays all Incidents that the user has entered as well as any records where they have been mentioned in the Review History. This includes when the user is given access by and alert or a Journal entry or a Distribution List entry or records entered by a user that is listed as their staff. Shows posted, unposted, deleted, or archived records. Any incident the user views from the All Incidents tab they will also appear in the Review My > Incidents tab.

Newly Assigned Incidents

Incidents which you have access to by assignment. Access is specifically sent to you by a triggered Alert, a Distribution list entry, or your permission level. The Incidents in this view are those which you have not yet viewed. As soon as incidents in this view are reviewed, they will no longer to appear in this view and will appear in your Entered Incidents view.

Archived Incidents

Incidents which you have entered in the system will appear in the Entered Incidents view. From this view you can **Archive** or hide Incidents, and only from this **Entered Incidents** view. When **Show Archived** is enabled in the Selection Settings window the Archived column will appear and a green Yes will indicate the record has a status of Archived.

Multiple Views

Records can appear in more than one List page view at the same time.

For example:

Newly submitted Incidents can appear in any of the following list pages concurrently:

- Inbox – Incidents for Review
- All Incidents
- Entered Incidents
- Assigned Incidents

Deleted Incidents can appear in any of the following list pages concurrently:

- Deleted Incidents
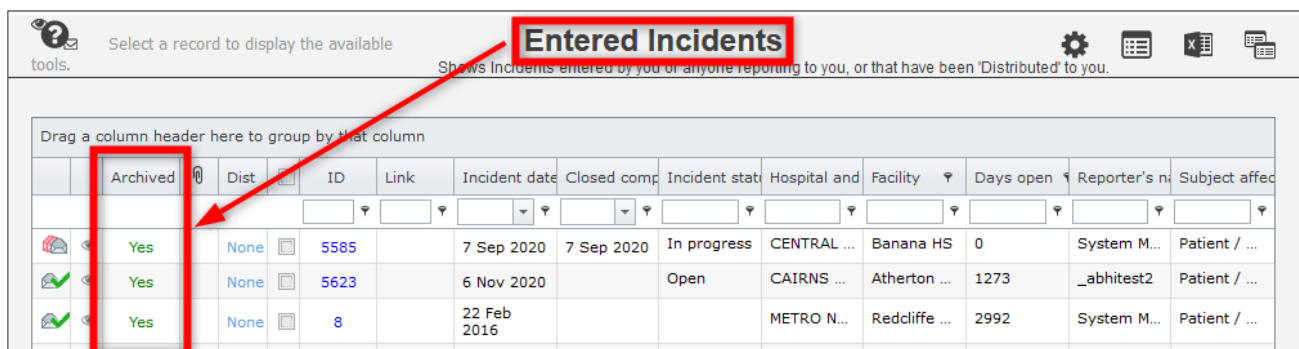- Entered Incidents
- Archived Incidents

Accepted Incidents can appear in any of the following list pages concurrently:

- Accepted Incidents
- All Incidents
- Entered Incidents
- Assigned Incidents
- Posted Incidents
- Archived Incidents

All Incidents can appear in any of the following list pages concurrently:

- Inbox – Incidents for Review
- All Incidents
- Entered Incidents
- Assigned Incidents
- Posted Incidents
- Archived Incidents

Posted Incidents can appear in any of the following list pages concurrently:

- All Incidents
- Entered Incidents
- Assigned Incidents
- Posted Incidents
- Archived Incidents

Entered Incidents can appear in any of the following list pages concurrently:

- Inbox – Incidents for Review
- All Incidents
- Entered Incidents
- Assigned Incidents
- Posted Incidents
- Archived Incidents
- Deleted Icidents

Submitted records

When an Incident is submitted it will be recorded in the **Inbox** as a draft awaiting review.

Review

Reviewers open an incident from the Inbox and make the required changes. Once they have completed making their changes to the record they have two options:

1. **Posting** - Once a record is reviewed it can be Posted which writes it to a master record **or**
2. **Saving** - It can be saved *without* Posting which creates a new draft version in the Inbox

Incidents can be re-opened and edited as many times as required. Each time there is an edit to the record and the record is posted or saved and a new draft version will be available.

Versions

Posting register records like Incidents or Feedback can exist in several versions. These versions are not necessarily written to the Posted master record.

If a Posted version of a record is opened and edited from a previous draft version and posted, the resulting new posted master record will be updated in Posted Incidents and a new draft based on the previous Posted record will be written.