RLDatix

RISKMAN QUICK REFERENCE GUIDE

USER Templates

Contents

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

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
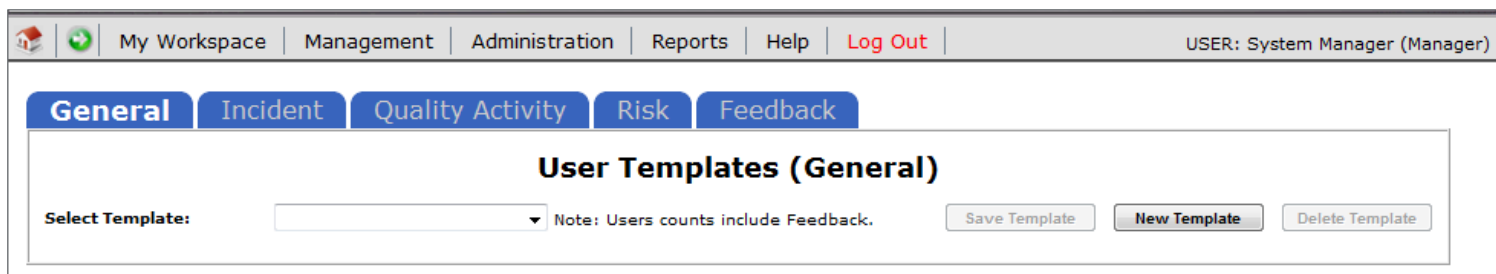
The User Templates page is made up of tabbed sections. Each tabbed section represents the Registers that you have available in your RiskMan e.g. Incidents, Feedback, Risks, Quality Activities; with an additional non-register specific tab called **General**. Depending on your permissions you may see all 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** (<u>**not available**</u> 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** ❶ tab you want to create the template under e.g. **General**

2. Press the **New Template** ❷ button

Example: Creating a template under the General Tab

3. Enter the name of your template in the **Template Name (User Type)** ❸ field

4. If the template is to be based on an existing template, select the template from the **Base this template on** ❹ 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

5. If you are creating a template under the **Incident** or **General** tab, you will have the option to select the default **Start Page** ❹ 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** ❺ 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 **ALL** 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

7. For **Register Templates** only, are there any **Specific Restrictions** ❻ applied to the users on this template. If so highlight as required

Example: Specific Restrictions for the **Incident** Templates

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

Example: Specific Restrictions for the **Risk Register** Templates

Specific Restrictions   ❻   (Restrictions in this section are specific to the register.)

Entry/Update Restrictions

☐ Show only "Alerted" Feedback items in Inbox.

Type of feedback Restriction:

Complaint
Compliment
Suggestion

Reporting Restrictions

☐ Show only "Alerted" Feedback items in Reports.

Type of feedback Restriction:

Complaint
Compliment
Suggestion

Restrict to these Reports:

(Sub-Report) Actions
(Sub-Report) Associated Risks
(Sub-Report) Feedback Items
(Sub-Report) Journal
Actions (All)
Actions (Completed)
Actions (Not Achievable)
Actions (Open)
Actions (Overdue)

Restrict to these Journal Types:

Action'required
Correspondence
File Notes

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 __only__ 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, __ONLY__ 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"**

8. For each Register template (not applicable to **General**), you will be required to specify which **fields** ❼ 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"** ❽ check box

Example: Field Settings for an **Incident** Template

Example: Field Settings for a **Quality Activity** Template

Example: Field Settings for a **Risk Register** Template

Example: Field Settings for a **Feedback** Template

9. 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)*

10. For the Register Templates under the **User Permissions** ❾ 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 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

MyDetails

- ☐ 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

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
- ☐ Can See Risks on Items
- ☐ Can Modify Risks on Items
- ☐ Can create Shortcut
- ☐ Can create empty Shortcut
- ☐ Can share Shortcut
- ☐ Can create Draft
- ☐ Can generate results using Letter Builder

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
- ☐ 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

User Permissions

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
☐ 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

User Permissions

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
☐ Can See Risks on Items
☐ Can Modify Risks on Items
☐ Can create Shortcut
☐ Can create empty Shortcut
☐ Can share Shortcut
☐ Can create Draft
☐ Can generate results using Letter Builder

Example: User Permissions under the **Feedback** tab

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

How do I modify an existing template?

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

1. Select the **Register tab** ❶ you wish to modify

2. Select the template from the **Select Template** ❷ list

3. Modify the template as required

4. Press **Save Template** ❸

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

❶

| General | Incident | Quality | Feedback | Risk |

User Templates (General) ❸

Select Template: ❷ Default (155 users) ▾ | 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 change the name.

Start Page: New... Incident ▾

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

No Restrictions in this area have any selected items.

Entry/Update Restrictions

Region Restriction:

Community
Corporate
Integrated
Residential

Location Restriction:

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** ❶ the template was modified under
2. Check the templates ❷ 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 ❸ of the template that you modified
4. Press the respective **Apply the Template Changes** ❹ or **Reset** ❹ 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

Example: Apply Template Changes page for General

| General | Incident | Quality Activity | **Risk** | Feedback |

❶ Apply Template Changes (Risk)

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. **❶**

Access to this page should be restricted to RiskMan Administrators only.

User Type:
☐ Administrator (5 Users)
☐ CLO (1 Users)
☐ Default (17 Users) **❷**
☐ Manager (1 Users)
☐ OHS Template with posting (1 Users)

Total users: 25

Reset individual restriction settings:

PLEASE 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 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.

| **Specific Restrictions** | (Restrictions in this section are specific to the register.) |

❸

Entry/Update Restrictions

☐ Show only "Alerted" Risk items in Inbox: ❓
☐ Risk item Involved Restriction:

Report Restrictions

☐ Show only "Alerted" Risk items in Reports: ❓
☐ Risk item Involved Restriction:
☐ 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.

☐ **Reset all individual permission settings:**
This means all the tick boxes at the bottom of the template page where you give permission to allow people to do things.

❹
Apply the template changes.

Example: Apply Template Changes page for Risk

| General | **Incident** | Quality Activity | Risk | Feedback |

❶

Apply Template 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 Type:
- ☐ 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)

❷

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 users 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.

| Specific Restrictions | (Restrictions in this section are specific to the register.) |

❸

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:
- ☐ 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.

☐ **Reset all individual permission settings:**
This means all the tick boxes at the bottom of the template page where you give permission to allow people to do things.

❹

| Apply the template changes. |

Example: Apply Template Changes page for Incidents

| General | Incident | Quality | **Feedback** | Risk |

Apply Template Changes (Feedback)

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 Type:
- ☐ Default (33 Users)
- ☐ Executive (5 Users)
- ☐ Manager (112 Users)
- ☐ Portal (1 Users)
- ☐ Quality & Safety Managers (3 Users)
- ☐ SuperUser (18 Users)

❷

Total users: 172

| Select All |

Reset individual restriction settings:

| Show 'Restrictions' reset section. |

❸

☐ **Reset all individual field settings:**
This means all the fields on the template form where you can say "Don't Display", "Mandatory" etc.

☐ **Reset all individual permission settings:**
This means all the tick boxes at the bottom of the template page where you give permission to allow people to do things.

❹

| Apply the template changes. |

Example: Apply Template Changes page for Feedback

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 ❶** page

2. Select the template you wish to delete from the **Select Template ❷** list - the number of users assigned to that template will display in the list

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

Note: The template **will only** 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

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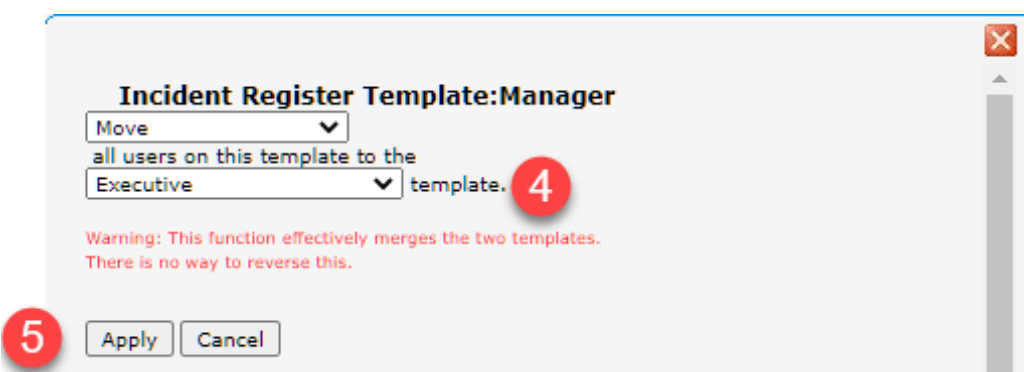
Note: Bulk Actions are not available in the **General** register.

The Move function

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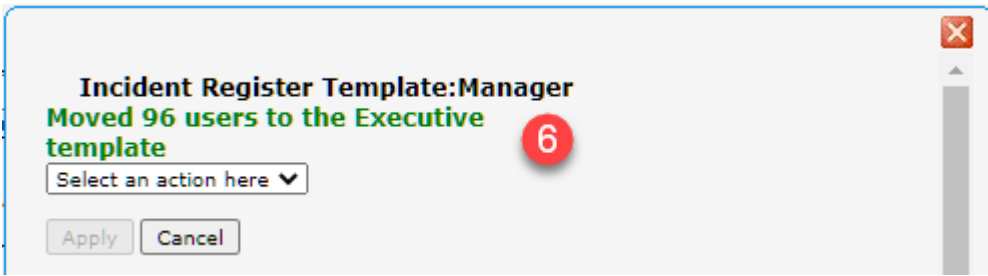
1. Select the Register ❶

2. Click on the ❷ Bulk Actions button

3. Choose ❸ **Move** in the **Select an Action here** drop down list
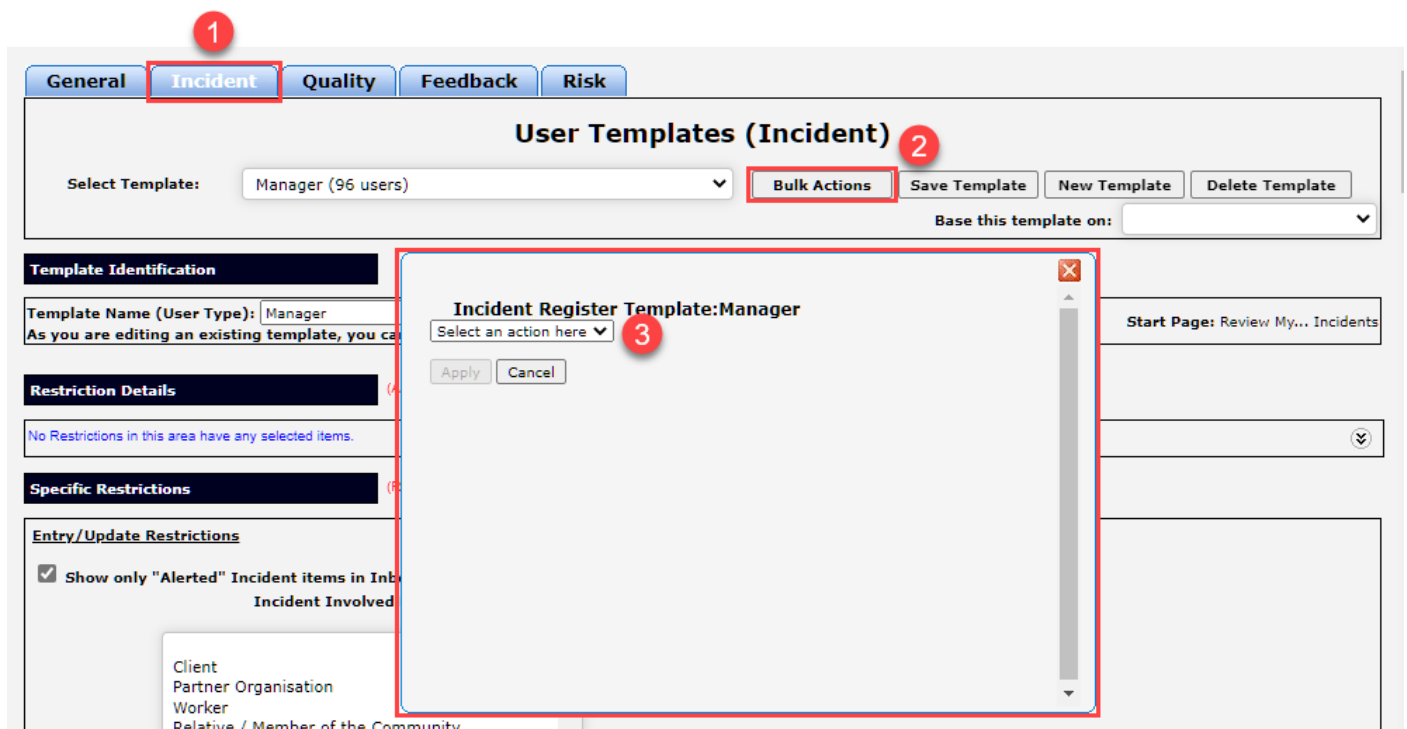
4. Select the ❹ Template that you want to move the users to
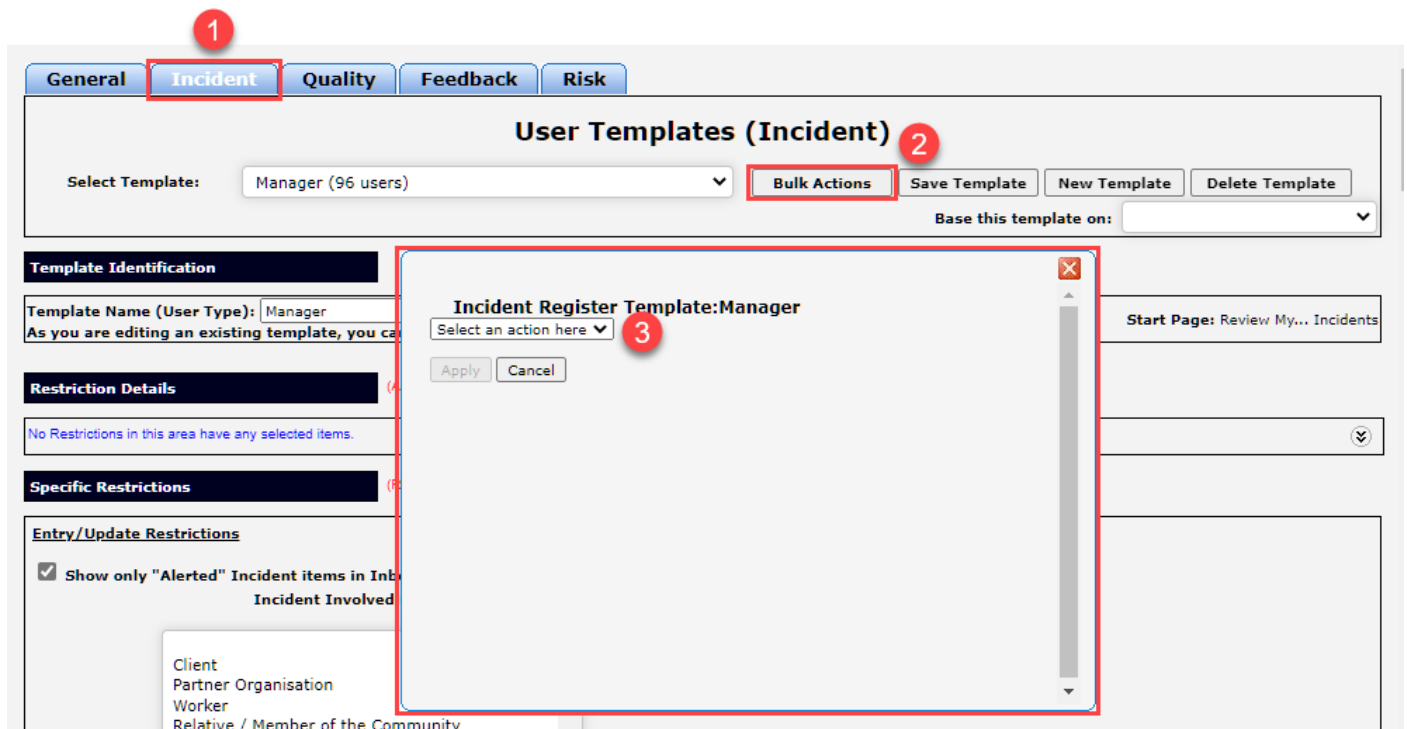

5. Click the ❺ Apply button

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 ❶

2.   Click on the ❷ Bulk Actions button

3.   Choose ❸ **Import** in the **Select an Action here** drop down list

4. Select the ❹ Register that you want to Import the users from

5. Select the ❺Template in the previously selected register that you want import users from
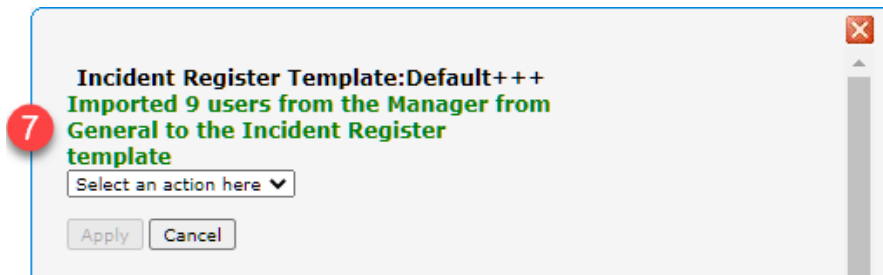

6. Click the ❻ Apply button

7. There will be a ❼ 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.
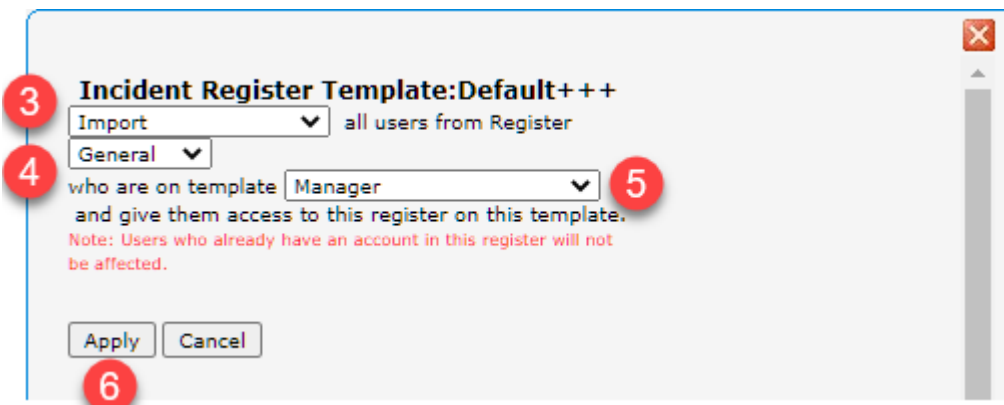
Modifying the Field & Section Labels/Colours on a Register Form

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
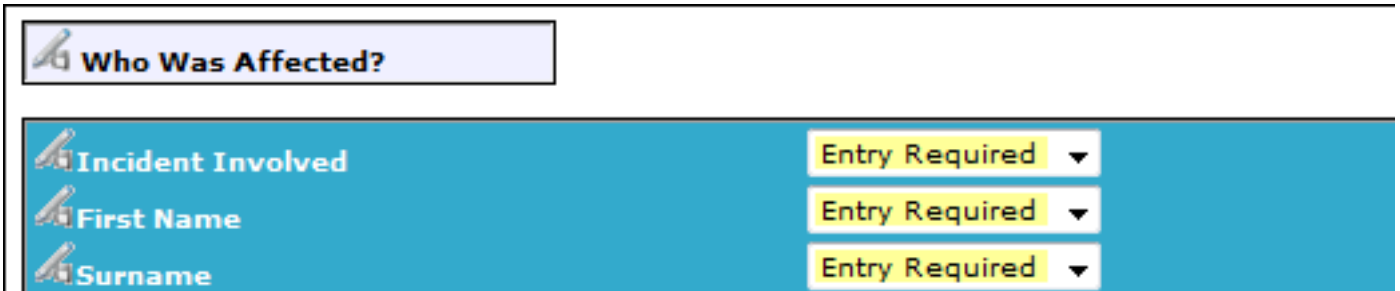
Example: Fields on the Incident Entry form

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

2. Click on the icon ❶ next to the respective field, which displays the Edit Field Detail panel:

3. Enter the label in the **New Title Text** ❷ field *(this is the label that will be used on the data entry form)*

4. The **Report** title ❸ determines what should be displayed when this field is utilised in Reports. The options below the label text include:

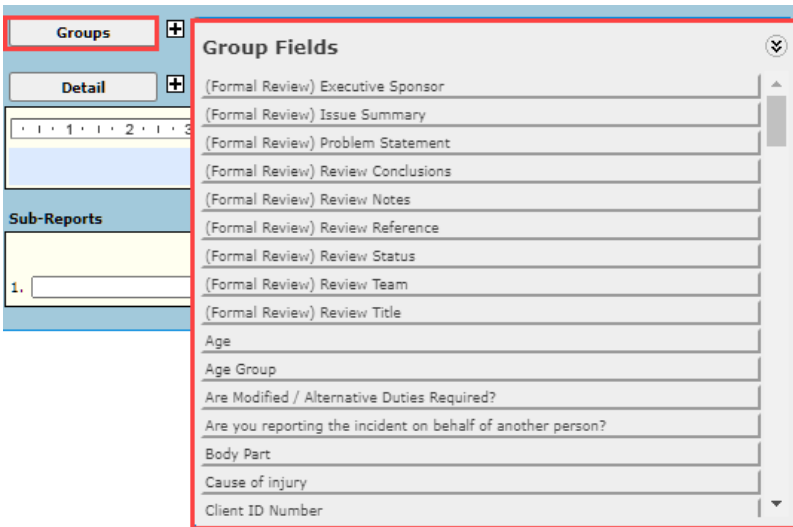   a. **Display:** Allows this field to be utilised in Reports

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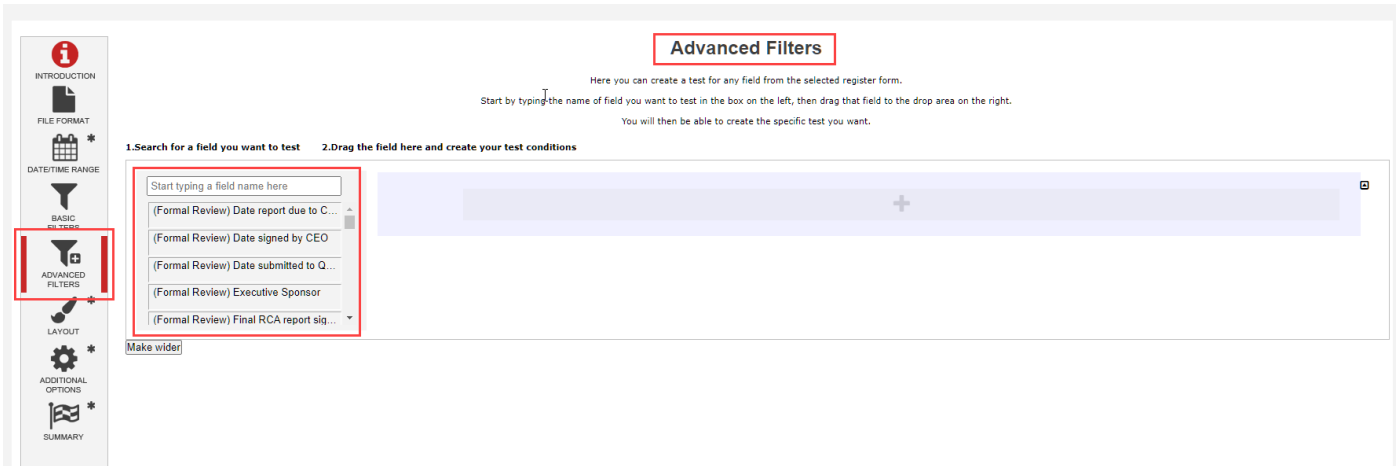
**Note**: The image above demonstrates the field this function relates to in the Reports page

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


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

5. The **Alert** title ❹ 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
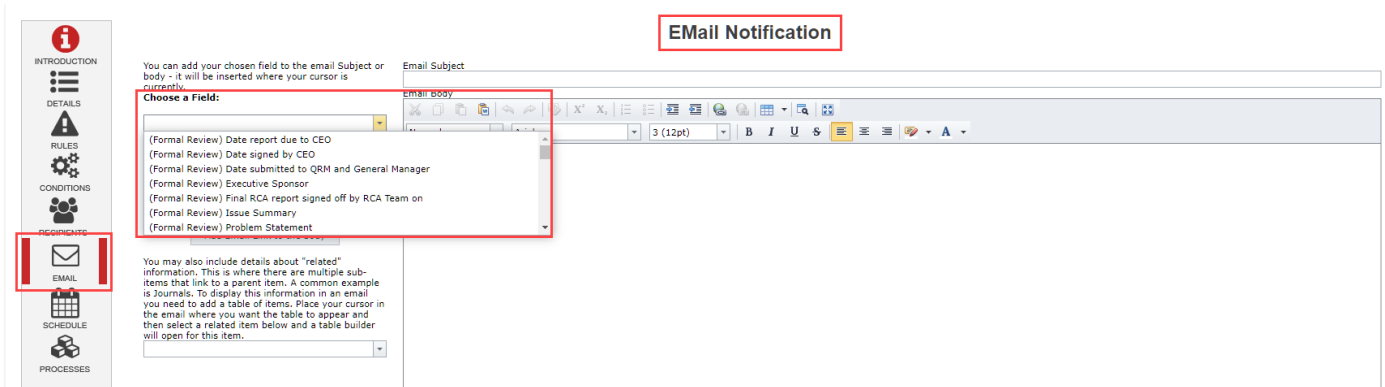
    b. **Condition:** Allows this field to be used when creating Alert filter criteria as shown below
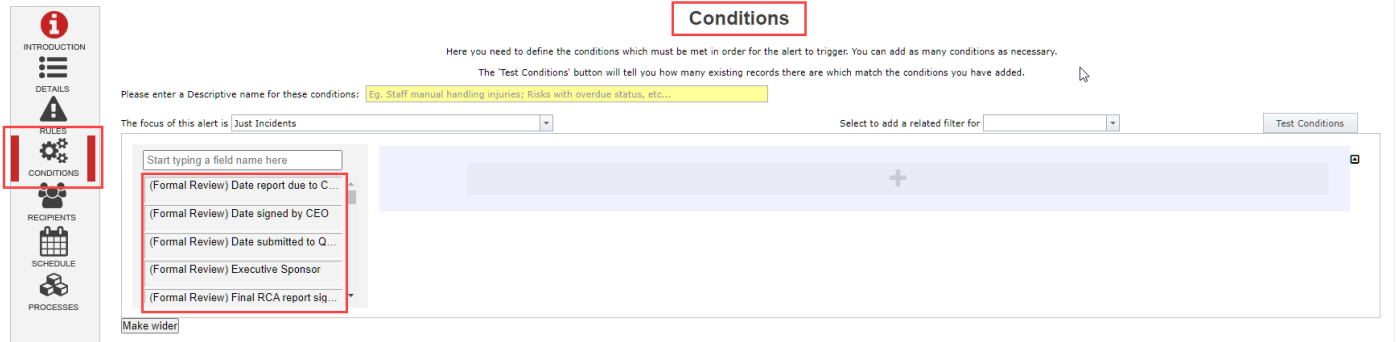

Note: The properties in the **Advanced** section <u>should not be modified</u> except without the explicit guidance of RiskMan International

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)*
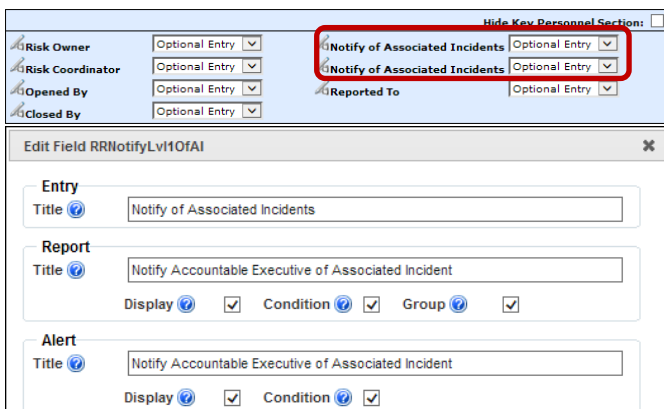

Example: "Notify of Associated Incidents" referring to the Accountable Executive on the Risk Entry form
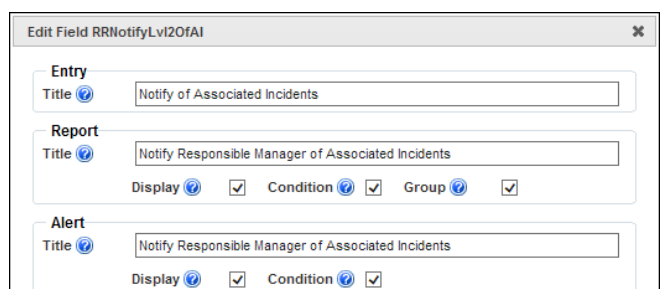
Example: "Notify of Associated Incidents" referring to the Responsible Manager on the Risk Entry form

7. 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
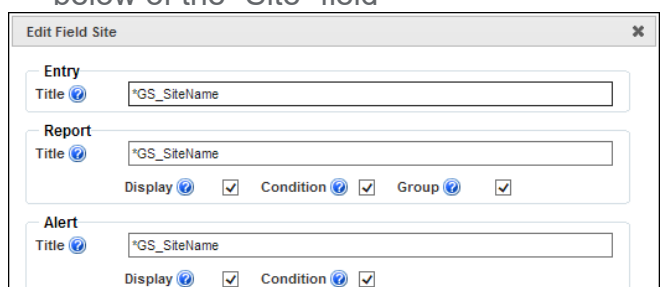
8. If you make a change to any of these labels, it will only affect the label on that Register Entry form and will **NO LONGER** obey the Global Settings label. An example where this may be useful

<div align="center">

**Global Settings = Site where Incident Occurred**

</div>

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 ✏ icon ❶ next to the Section Title
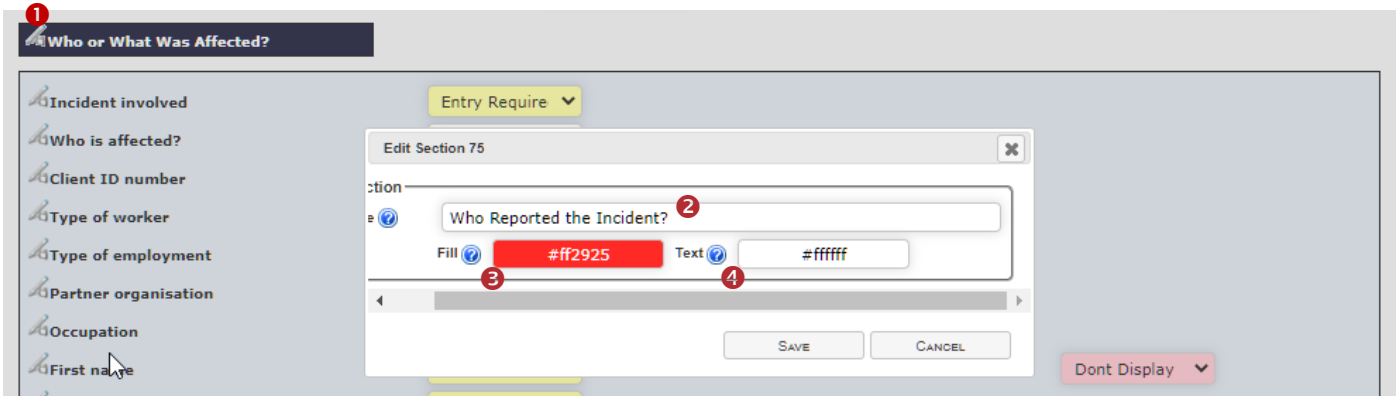
2. Modify the label in the **Current Section Title** ❷ field *(this is the field on the respective Register form)*

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

3. To change the background colour and text colour of the section click on the respective **colour box** ❸ & ❹ , 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 - https://hub.rldatix.com/SupportHUB/s/

4. Press **Save** when complete

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