CARDINUS
riskmanagement

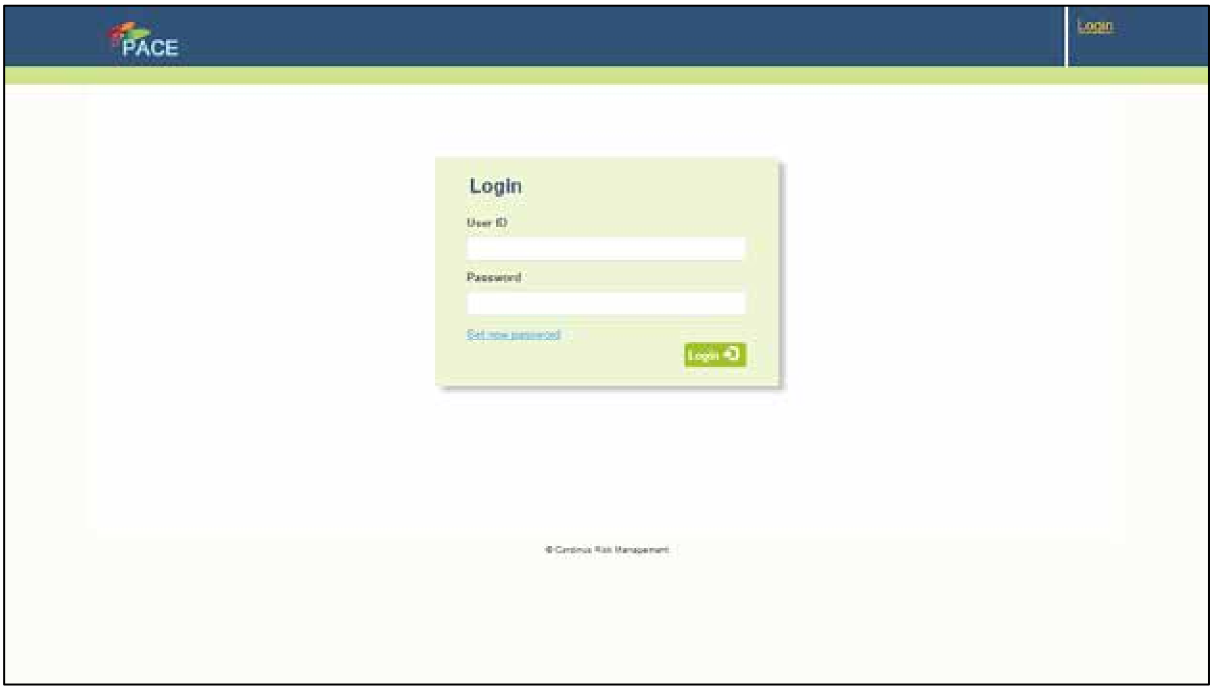
PACE ESSENTIALS MANUAL HEALTHY WORKING

VERSION 1.3

CONTENTS

1.0 PACE Basics

1.1 Logging In



Your Cardinus contact will be able to provide you with a link to your PACE system. They should also provide you with your User ID. The first time that you log in you will need to use the **Set new password** link to set your password.

Click **Set new password** and enter your **User ID** and **Email address**. Click **Submit.** You will be sent an email, use the link it contains to create your password. Once your password has been created you will be able to log on to the system.

1.2 Navigation and Dashboards

Once you have created your new password, you will be able to access PACE proper. Your PACE home page may not look exactly like the one pictured above but the general features will be present:

- The PACE logo in the top left-hand corner acts as a link back to the home page from anywhere in PACE.
- The browser back button will take you back one level in any menu.
- Along the top of the screen are icons that link to the major PACE functions:
  - Training
  - Risk Manager
  - Case Manager
  - Users
  - Reporting
  - Email
  - Programmes
  - Administration

Clicking the icon will either take you directly to the function, or, where that area of PACE has more than one section, produce a drop-down menu of those different sections.

NOTE - It is possible that you may not see all of the above options; the full list assumes that you have access to all areas of PACE.

- The **Notifications** box on the right-hand side of the screen is used to alert you to anything that requires your attention. There will, in all likelihood, be no Notifications when you log in for the first time, but as you use PACE over time you may start to see:
  - **Task notifications** – Here you will see the number of outstanding Tasks (Tasks which have not yet been marked as completed) and overdue Tasks (Tasks which are not yet marked as complete and the '**Required by**' date of which has passed). Clicking the notification will take you to the Case Manager.
  - **Training records** – it shows you training records that have been created in the last 7 and 14 days.
  - **Risk Assessment records** – it depicts risk assessment records created in the last 7 and 14 days.
  - **Assessor led assessments** – if you have created or been allocated any ergonomic desk assessments as a system administrator you will be able to see them by clicking on the appropriate link.
  - **Schedule notifications** – these alert you when there are email schedules that require authorisation. Clicking on this link will take you to a list of the emails requiring approval.

The final part of the home page is the dashboard. Again, yours may look a little different to that pictured as this reflects data from a system that has been running for some time. Dashboards offer an at-a-glance overview of the status of your programmes.

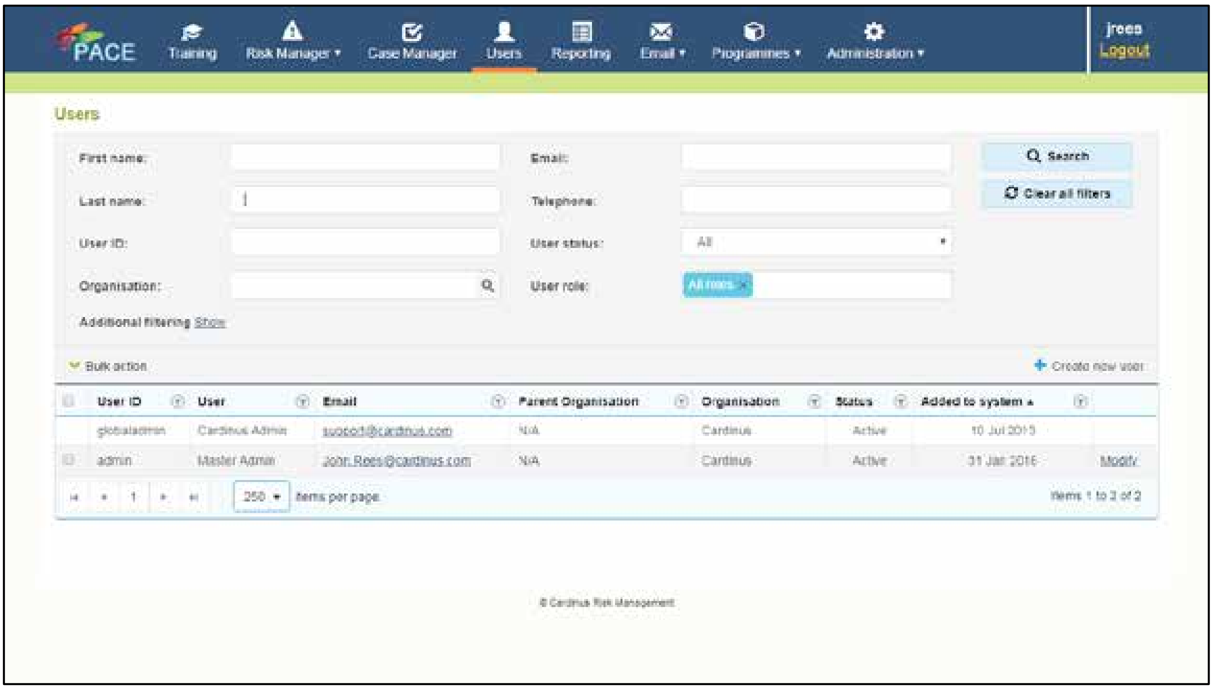
NOTE - Your dashboards are updated several times during the day, but they are not "real-time". You will see in the top left-hand corner a statement as to the date that they were last updated.

- The **Risk Assessment Status** dashboard displays a simple pie chart telling you the proportion of users who have completed at least one Risk Assessment. The green area represents users who have completed an assessment; grey represents those who have not.

- The same applies to the **Training Status** dashboard, although this one refers to how many users completed their elearning. As risk assessments tend to be completed after training it is not unusual for the **Training Status** dashboard to show a slightly higher level of compliance than you see on **Risk Assessment Status**.
- **Compliance Trend** shows you how the percentage of users who are considered “compliant” has changed over time.
- **Original Risk Status** charts the proportion of High, Medium Low and No (None) risk recorded on your risk assessments.
- **Current Risk Status** charts the proportion of High, Medium Low and No (None) risk in your risk assessments once any remedial actions have been taken into account.
- **Risk Trend** charts the proportion of high medium and low risk over a period of time.

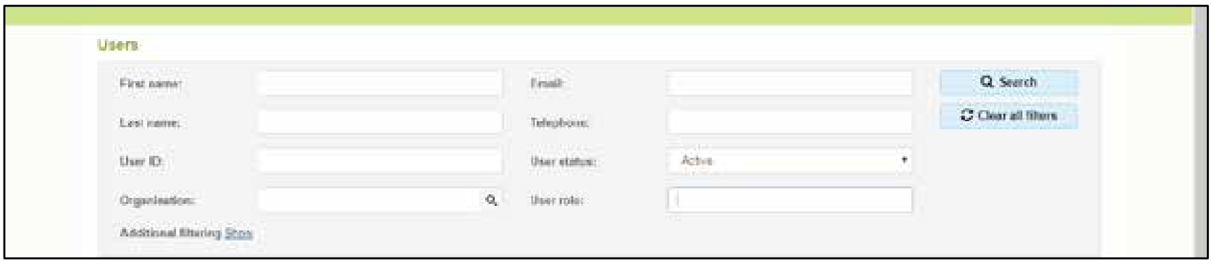
2.0 Users Menu

2.1 User search



Clicking on the Users icon takes you to the Users List screen. From here you can search for specific Users (or groups of Users), amend User details and create new Users.

Unless you are looking to create a new User you will generally start with a User search.



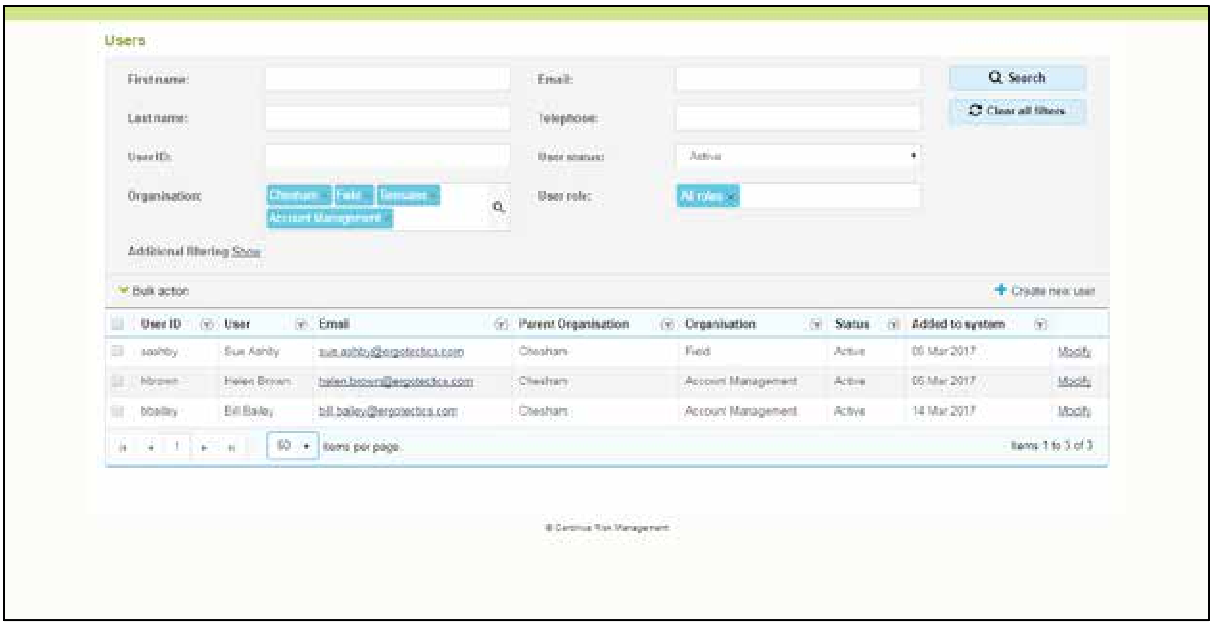
Most searches are based on the User’s ***First name***, ***Last name***, ***User ID***, ***Organisation***, ***User Status*** or ***User Role*** (course user, master administrator, sub administrator etc)

When searching by First name, Last name or User ID the search setting is a “contains” search. That means that all records where the field you are searching contains the characters you entered in that order. So if you search on “hris” in **First name**, it would return every user called “Chris”, “Christopher”, “Christian” or “Christine” but not a user called “Kris”.

The search option, ***Organisation***, is a little different. This is a “lookup” search, as indicated by the magnifying glass icon at the end of the field.

Click that icon to open the Organisations lookup window. This displays a list of all Organisations in your system. To select a specific part of the organisation click on the box next to the name of that part of the organisation. To select any sub organisations click the box twice. In the example below the sub organisations for Chesham have been selected by clicking on the box for Chesham twice.

Click on OK and the parts of the organisation selected will be displayed in the User search screen. Clicking on Search will then bring up the names associated with those.

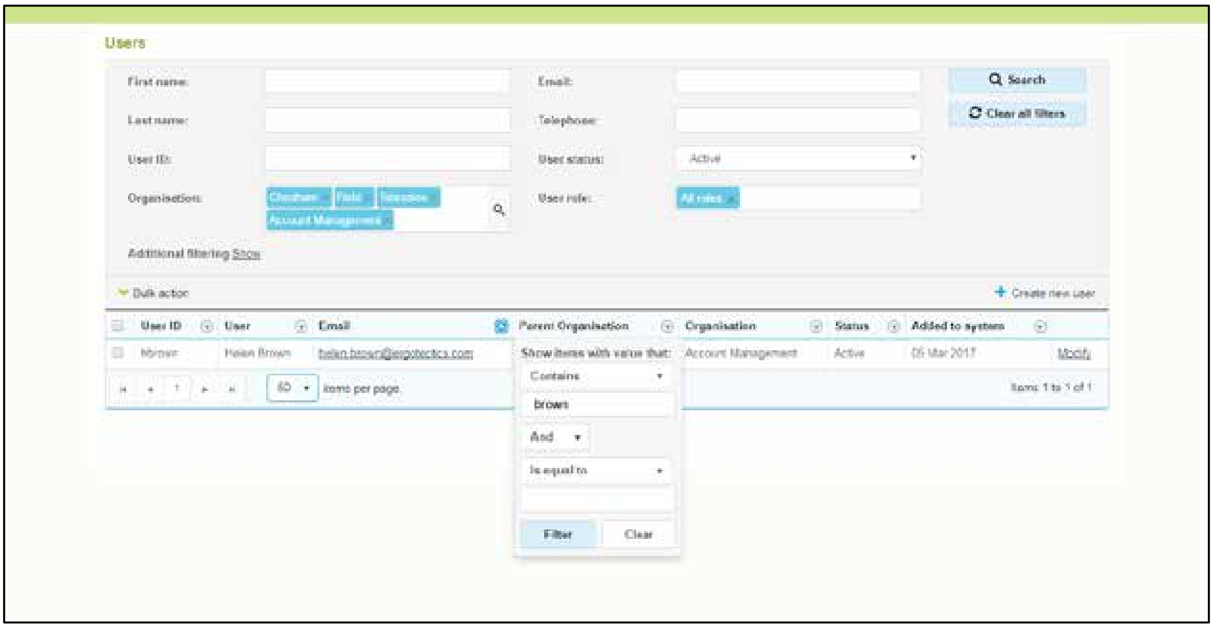


Once you have your search results, you have the ability to further refine your data. This can be done either by clicking on the column headers to sort the data in alphabetical or numerical order or with the filters using the icon that appears to the right of each column heading.

Text fields can be filtered to include only exact matches (“Is equal to”), exclude exact matches (“Is not equal to”), or to look for partial text (“Starts with”, “Contains”, “Does not contain”, “Ends with”), and again you can apply more than one criterion.

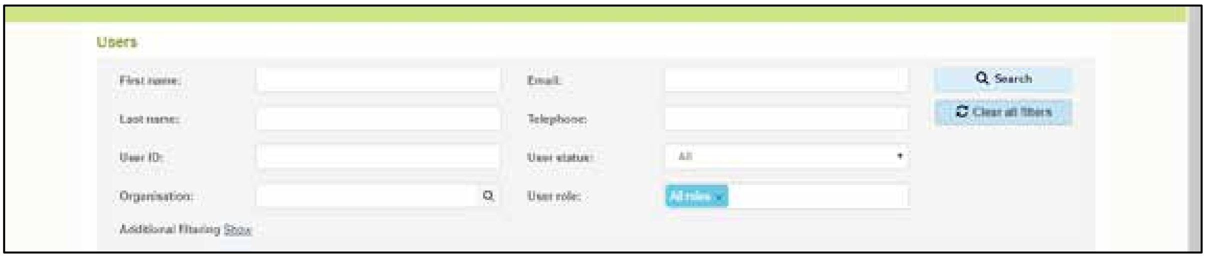
The search option **User Status** allows you to search for users based on whether they are active users, archived users, suspended or long term absent. There is also an ‘All’ option in this filter. By default when users are created they will be ‘active’ but when they leave they will be set to ‘archived’. The Long term absent category can be used for sickness, maternity or other forms of absence. Suspended means that the user is still part of the active database but that scheduled emails will not be sent to that user.

In the example shown below the **Email address** has been filtered for someone **containing Brown** in their name.

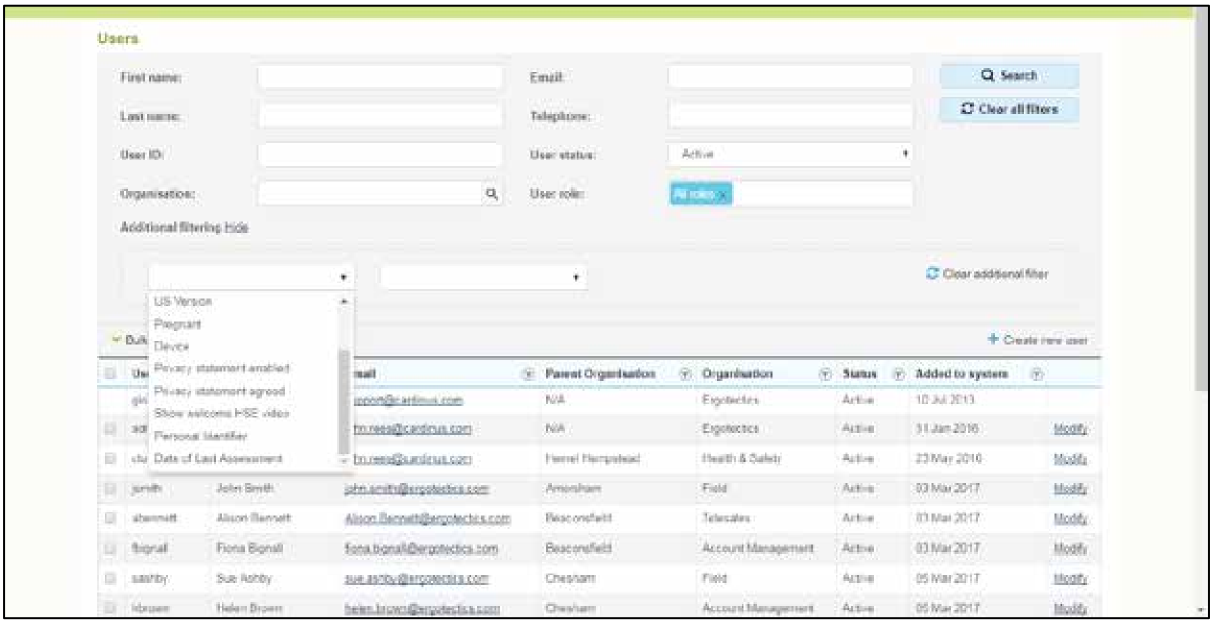


This yields the results where anyone with the letters **Brown** in their email address is found.

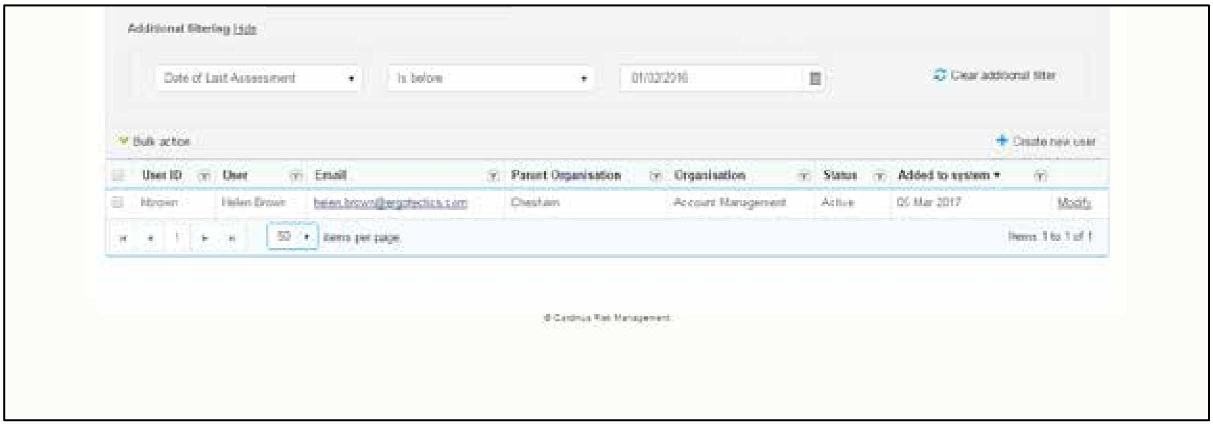
Additional filtering



The final filtering option allows administrators to search by additional fields in the users' records. Clicking on **Show** reveals a drop down menu that has the additional fields available.



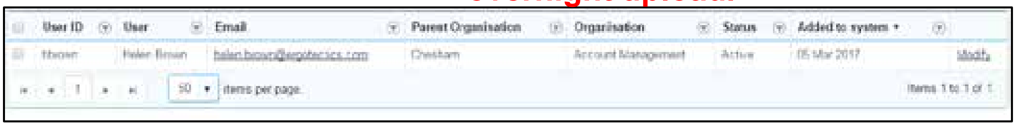
In this case the filter is on the last assessment date being before 1/02/16 and has found 1 person.



2.2 Amending User Details

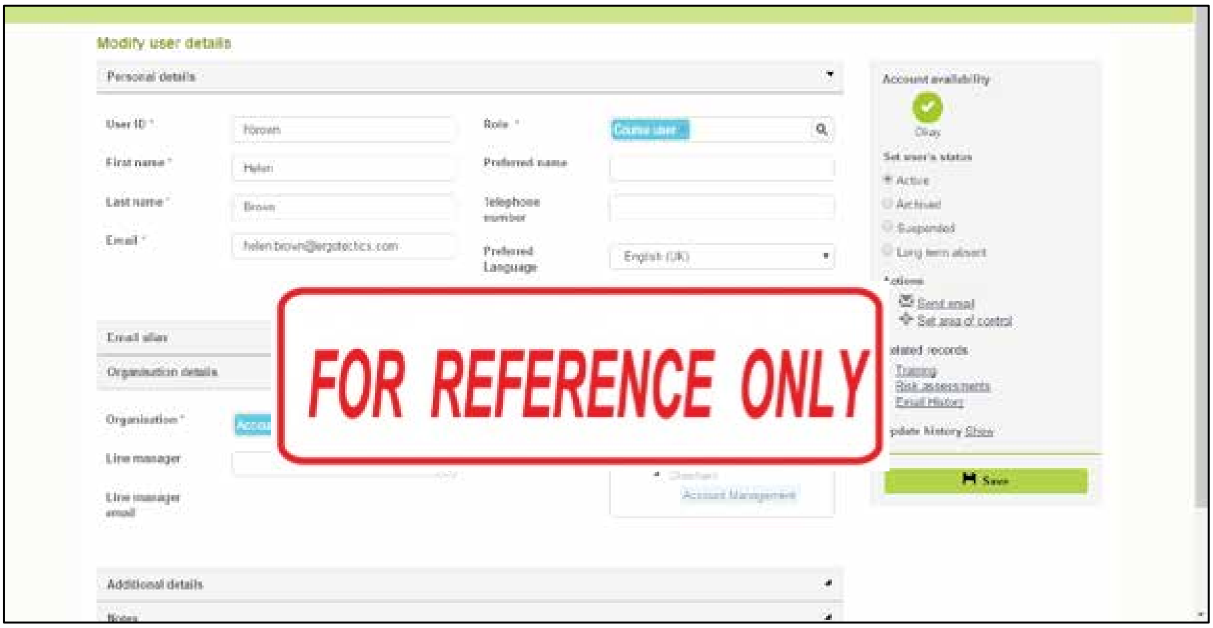
Please note you must not change any user details apart from marking them as 'long term absent' or 'suspended' as all other details are updated via an overnight upload.

2.2.1 Modify user details screen



Click **Modify** to amend a Users' details.

NOTE - Users should have their User Status amended to "Archived" (see below) if you want to effectively exclude them from the system.



In the **Modify user details** screen you can amend any detail for that User. The **Personal Details** section relates to basic User information such as name and contact details and it includes their **User ID**. This section also includes the option to change the role for the user. For most users they will have the role Course user but there are other roles such as administrator which can be set by another administrator.

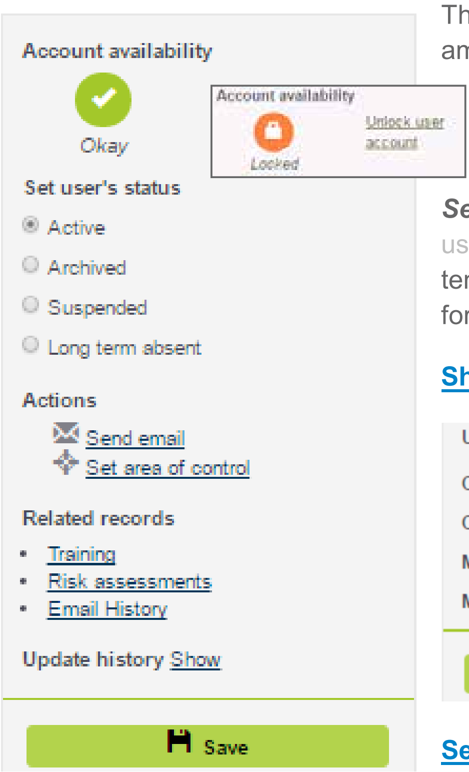
Email Alias allows you to set an email alias for a user that has to send out emails. This could be the name of the user or it could be a department name. In any event the From email address should be set to pacesystem@cardinus.com so that issues with the firewall with incoming emails are avoided.

Organisational de… …isation.

> **NOTE - Be very careful about changing *User ID*s. These uniquely identify the User in the system and are often used to link PACE to other systems. Changing the User ID could prevent certain processes from functioning or could lead to the creation of duplicate User records.**

The exact contents of the ***Additional details*** section will be defined during the initial set up of your system and may vary from those pictured.

2.2.2 Modify user details side panel

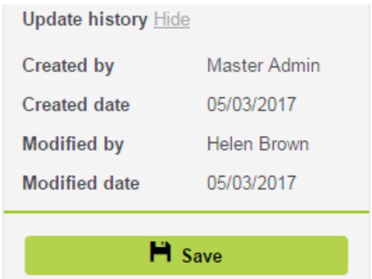


The panel in the top right-hand corner offers further options for amending user details.

Account Availability signals whether the User is **Okay** or **Locked**. If "Locked" you can **Unlock user account**.

Set user's status. The default is **Active**. Use **Archived** for users who have left the Organisation, **Suspended** to temporarily suspend the users account and **Long term absent** for users on long term leave.

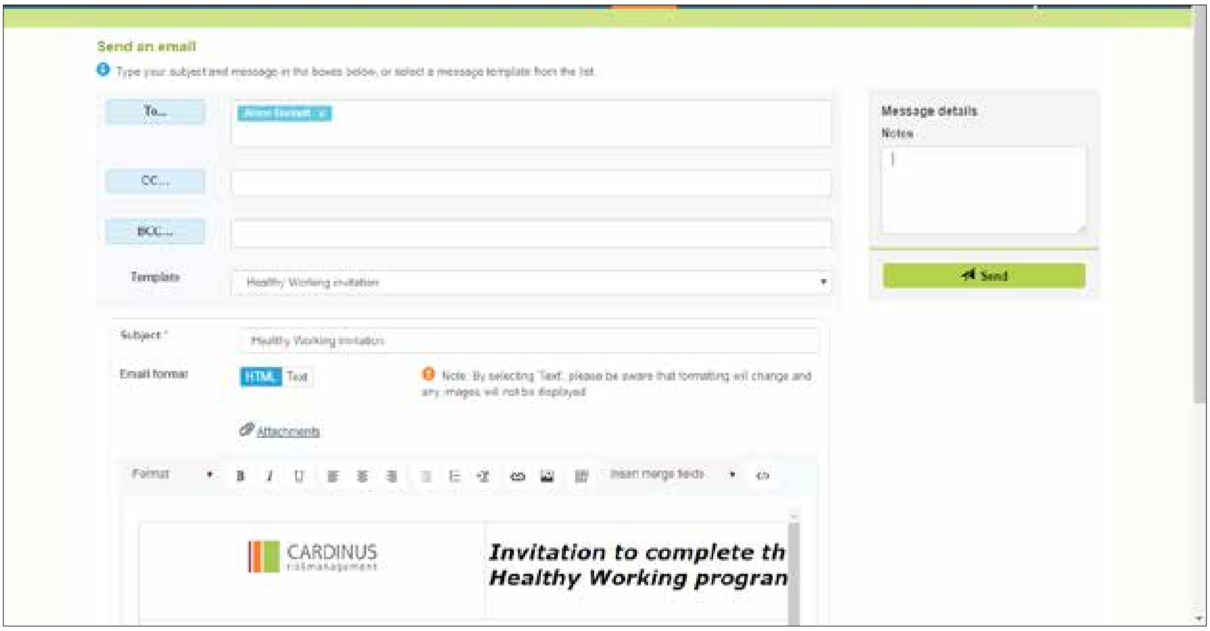
Show / **Hide** ***Update history*** (pictured below).



Send email – this is covered in more detail below

Set area of control – this is covered in more detail below

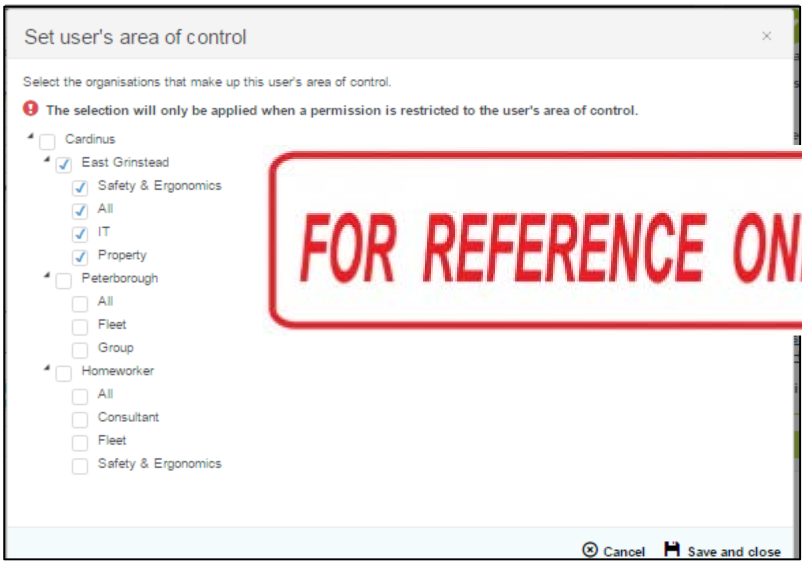
2.2.3 Sending the User an email



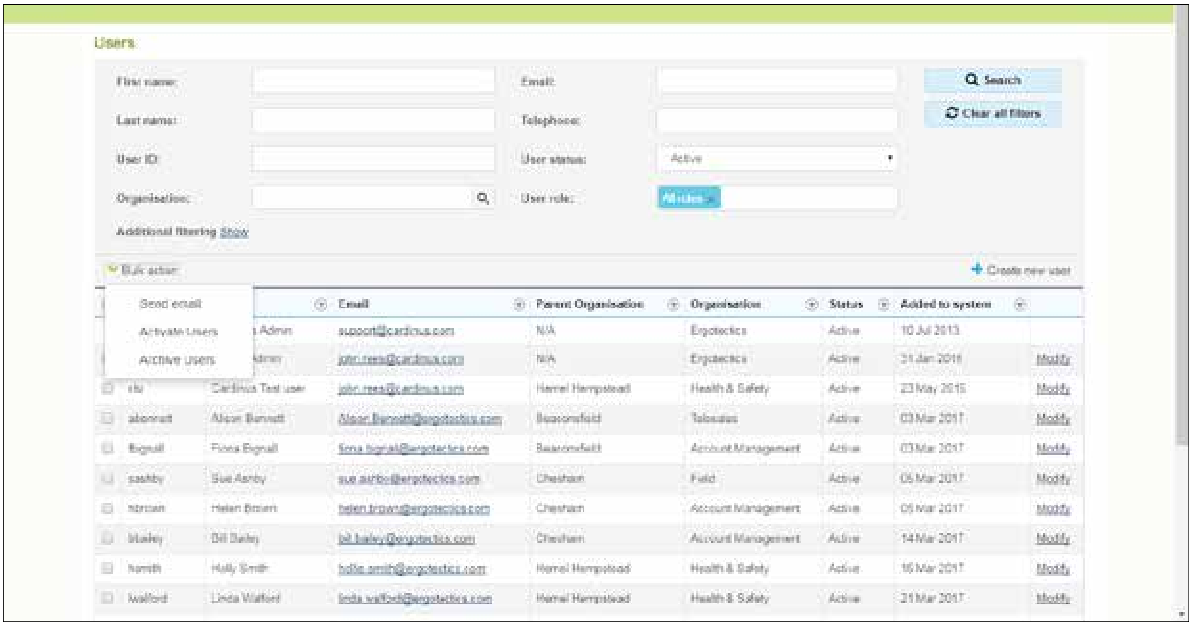
Clicking the [Send email]() link in the side panel opens the standard ***Send an email*** screen. Here you can either choose a pre-existing email from the ***Template*** drop-down list or use the large text box at the bottom of the screen to compose your own emails. Click ***Send*** when you are happy with your email. You can also use cc or bcc to copy in others.

2.2.4 Set user's area of control

It is possible to limit administrator access to one or more parts of the Organisation. Clicking Set user's area of control opens the pictured window. Organisations are added to that user's area of control simply by checking the box next to that Organisation. When you are happy with the organisations you have assigned, click Save and close.



2.2.5 The Bulk Action drop-down list



One option for amending user details is provided by the Bulk **Action** drop-down list above the user grid. This differs from the methods covered so far in that it is possible to make the same amendment to multiple users at the same time. The **Action** that you choose is applied to all users with a check in the box next to their **User ID**.

With the Bulk **Action** drop down list you can:

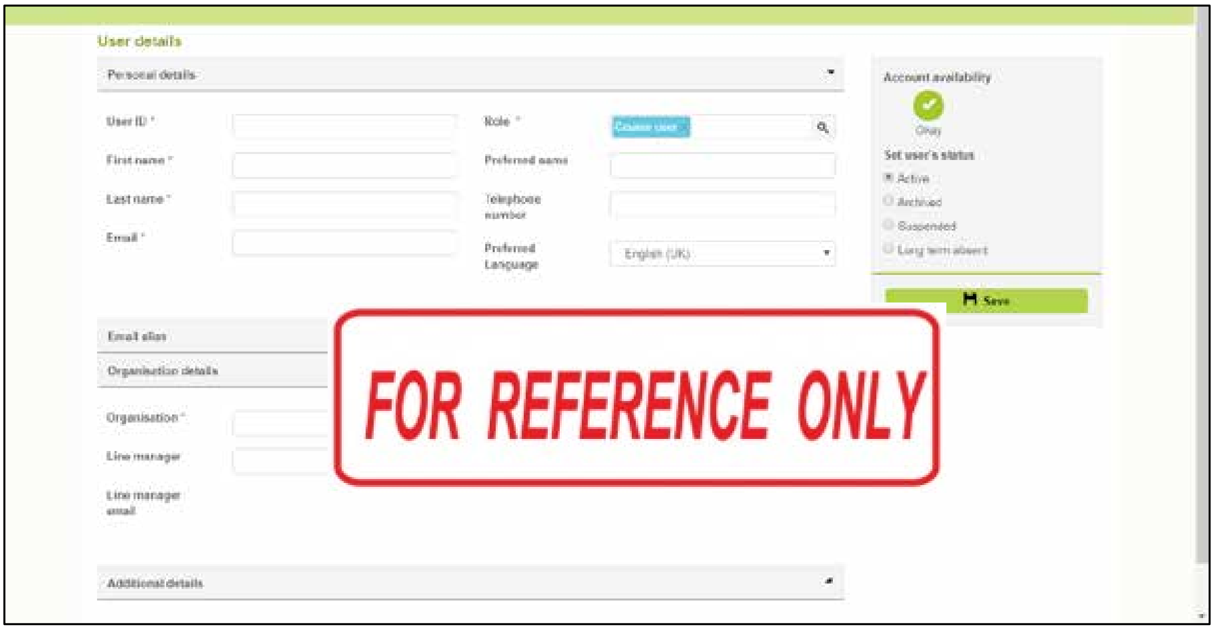
- Change selected users' statuses to:
    - Active
    - Archived
- Send an email. The email you write goes to all selected users, but the **Send an email** screen is no different from that pictured in section 2.2.3.

2.3 Creating Users

To create a User you must at least provide:

- User ID – (this mu
- First name
- Last name
- Email Address
- Organisation

The new User's status will default to ***Active*** - it is unlikely that you would want it to be anything else.



The **Role** is by default set to Course User however other roles can be assigned such as PACE administrator or Master administrator. These are described in section 2.4.

As noted in section 2.2.1, *Additional details* refers to other information that can be collected about the User. The exact range of options in this section is configured during the initial set up of your system and may not match what you see.

2.4 Roles & Rights

In order to perform any action in PACE or the User Hub, a user must have been allocated the “rights” to perform that action. To save administrators the trouble of minutely deciding for each user exactly which rights they will need, “rights” are allocated through the assignments of “roles” that collect relevant rights into a single group. The standard “roles” provided by the PACE system are:

Master Administrator	A user with administrator rights with access to almost every aspect of PACE – the Master Administrator is likely to focus on the day-to-day running of the system.
Sub Administrator	A user with administrator rights who is limited to a specified “area of control”.
Course User	A user who can access the Course Hub but who has no access to PACE.
Assessor	A user with administrator rights who can access certain parts of the PACE database for the purpose of recording assessment notes
Cardinus Customer Service	Allows Cardinus customer service to assist with PACE management and customisation

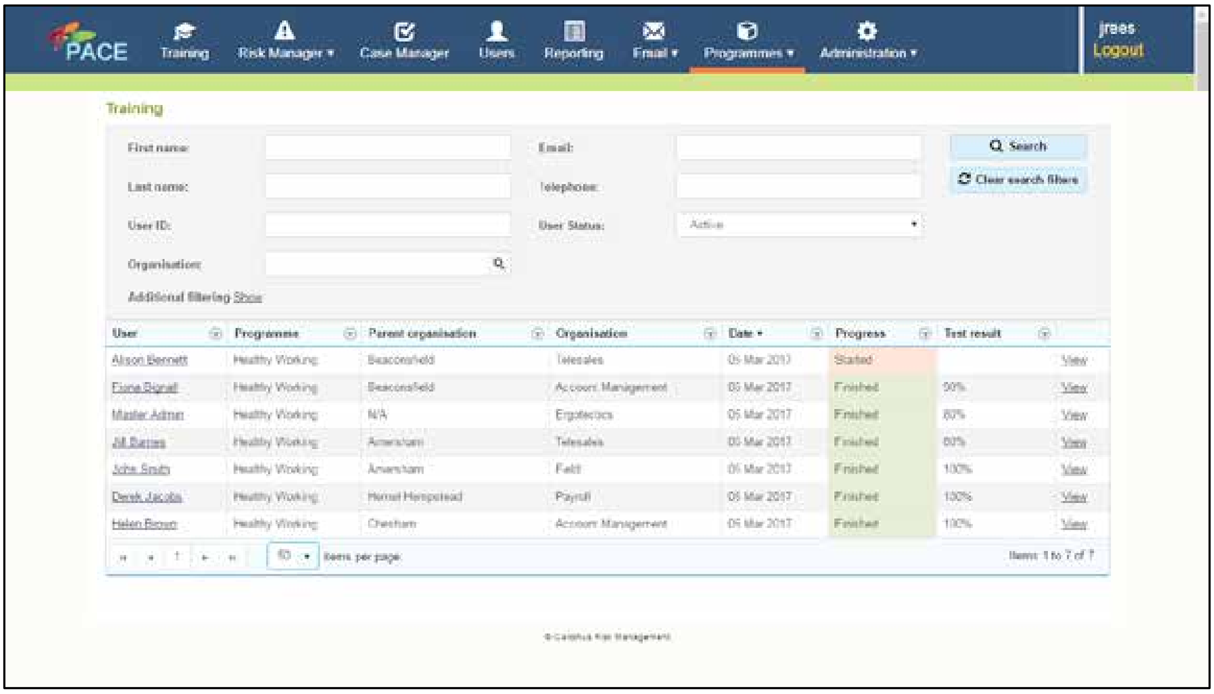
Users can be assigned multiple roles e.g. a Course User and Assessor – in this case they will end up with a wide range of rights as they only need each right to exist in one of their many roles for them to be able to exercise it. It is also possible to define additional roles and allocate those to relevant users.

Roles and rights are managed through the **Administration** module of PACE. The **Roles and rights** menus sit under the **MANAGE ADMINISTRATORS** menu. You may not have sufficient rights to access this module but you will be able to use the roles and rights that have been created.

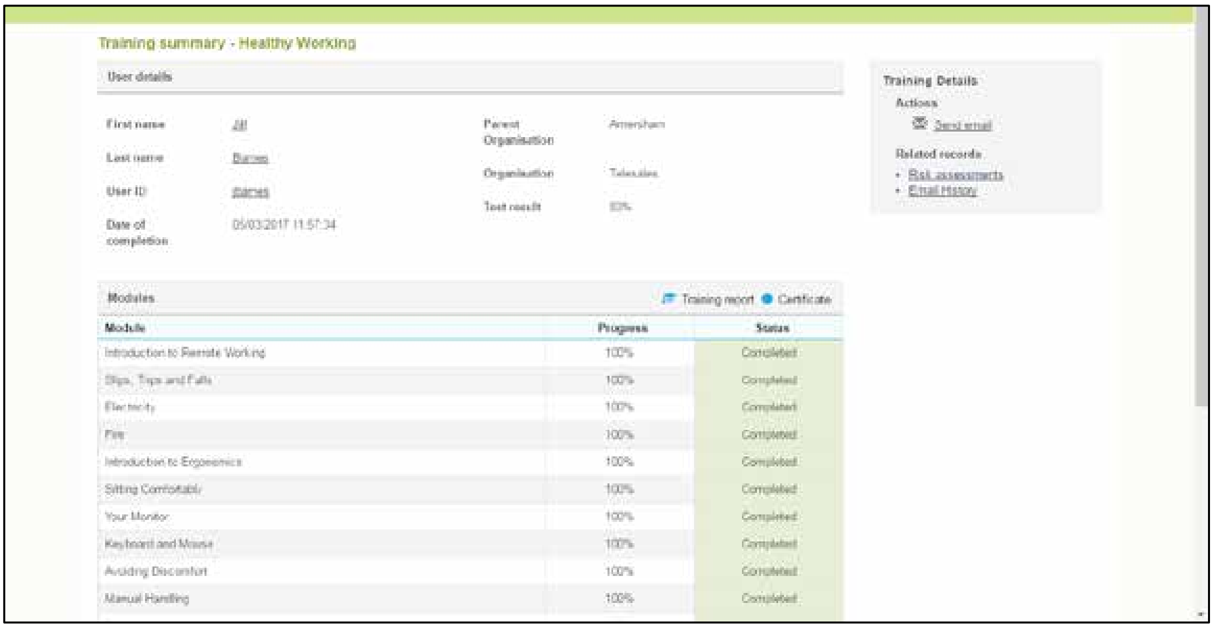
3.0 Training Menu

The **Training** section of PACE gives you visibility of your users’ progress in relation to their eLearning.

Access it by clicking on Training at the top of the screen. A training record is created as soon as a user begins their eLearning – users who have not begun their training do not have training records and therefore do not appear on this screen. Search for records using the fields at the top of the screen.



Click **View** next to a Training record to view it in more detail. The **Training summary** screen shows you the user's progress in terms of how far they have progressed on all the modules they have so far attempted.

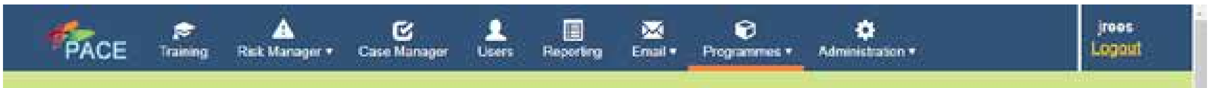


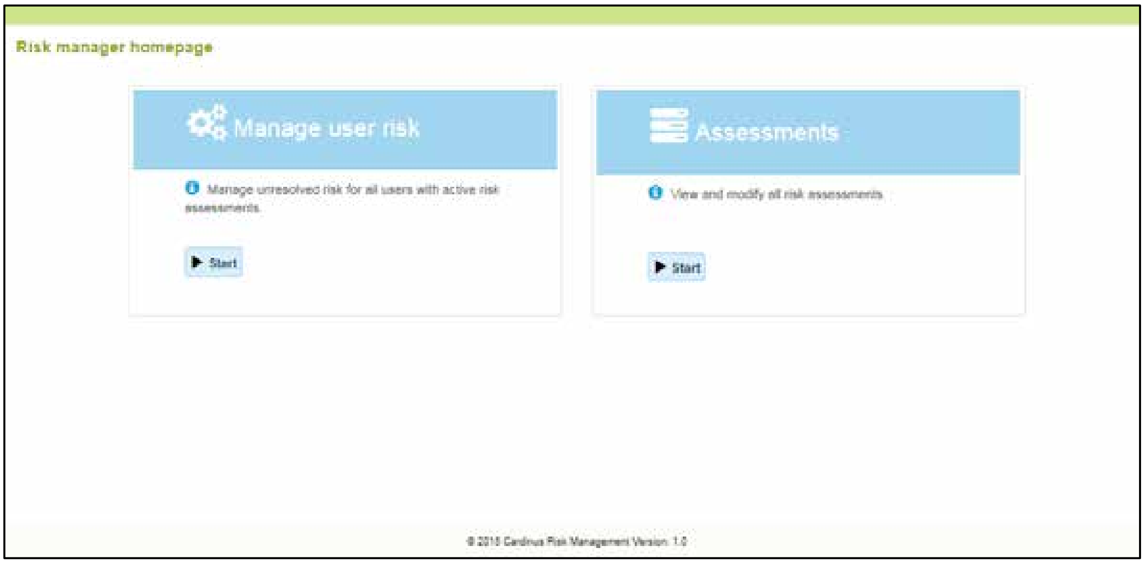
You can access the User record directly from here by clicking their **First name**, **Last name** or **User ID**. Click **Send email** to send the user an email. The **Actions** box on the right of the screen gives you access to that user's **Risk assessments** and **Email history**. You can also view the Training report and certificate from the individual training record and print these off if required.

4.0 Risk Manager Menu

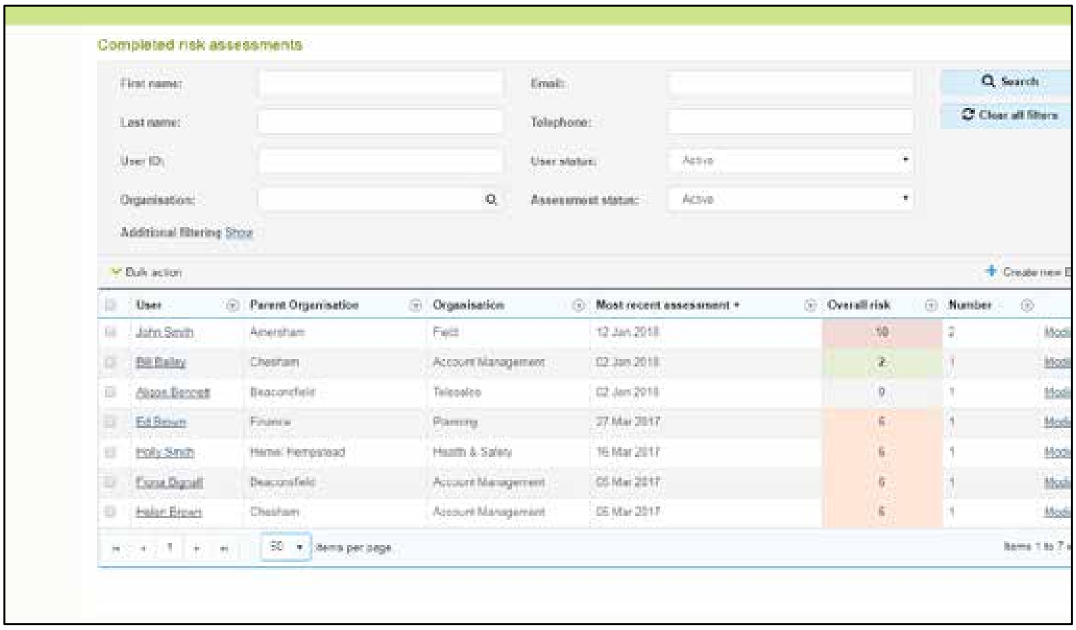
4.1 Viewing User Risk

Risk can be managed at either the assessment level – reviewing each assessment separately as would have been done in earlier versions of PACE, or at the user level. This second approach allows you to take a broader view, pulling all Assessments for that user into one view and interface. Either way, you start with the **Risk Manager** icon in the PACE menu bar.





Click **Start** for your desired approach – **Manage User Risk** or **Assessments**. It is recommended that you start with **Manage user risk** as this is considerably more efficient and effective than working with **Assessments**. If however you need to manage risk assessments and their progression you should start by clicking **Assessments**. This is covered in detail in Section 4.2.

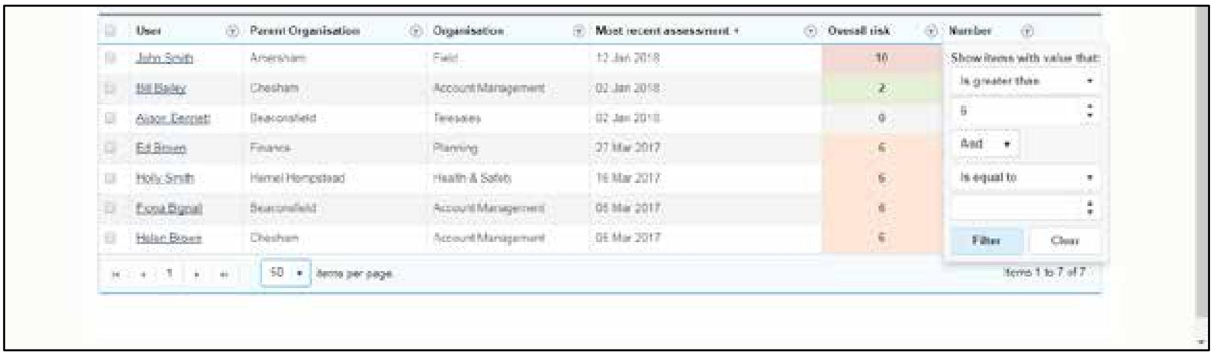


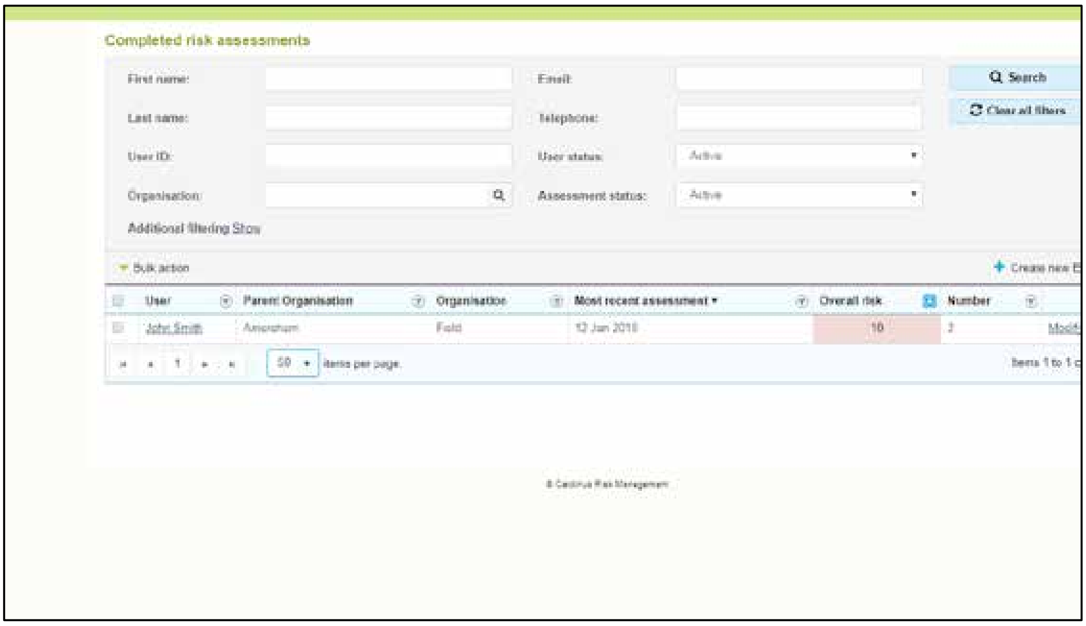
Manage user risk takes you to the **Active risk assessments** screen. This will list users with active risk assessments with the **Most recent assessment** at the top. If you cannot see the user(s) whose risk you want to manage, use **First name**, **Last name**, and **User ID**. You can also limit your search to specific **Organisations**.

Please note that under the Number header it lists the number of risk assessments that this person has active. The **Healthy Working Profile** also counts as one assessment but will always have a risk level of 0 as it is purely for information. The actual risk assessment is listed under the header **Healthy Working.**

In addition to the search fields, you can apply filters to the columns in your list of users. Each column has an icon on the right-hand side that gives you access to filter criteria. The exact options you have depend on the kind of data the column is displaying. In the example opposite, a date field (**Most recent assessment**) is being filtered.

You can apply multiple filters against multiple columns to drill right down to precisely the data that you want. On a simpler level, clicking the column heading causes the list to be sorted on that column. Click the heading again and the reverse order will be applied.





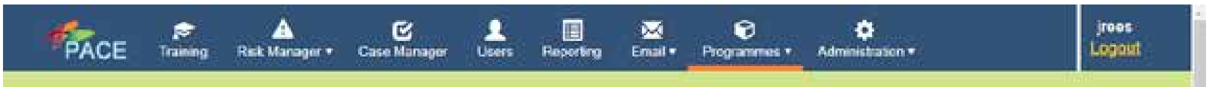
After searching and/or filtering you will have the users that you are interested in displayed on screen. In addition to their names and Organisation we see:

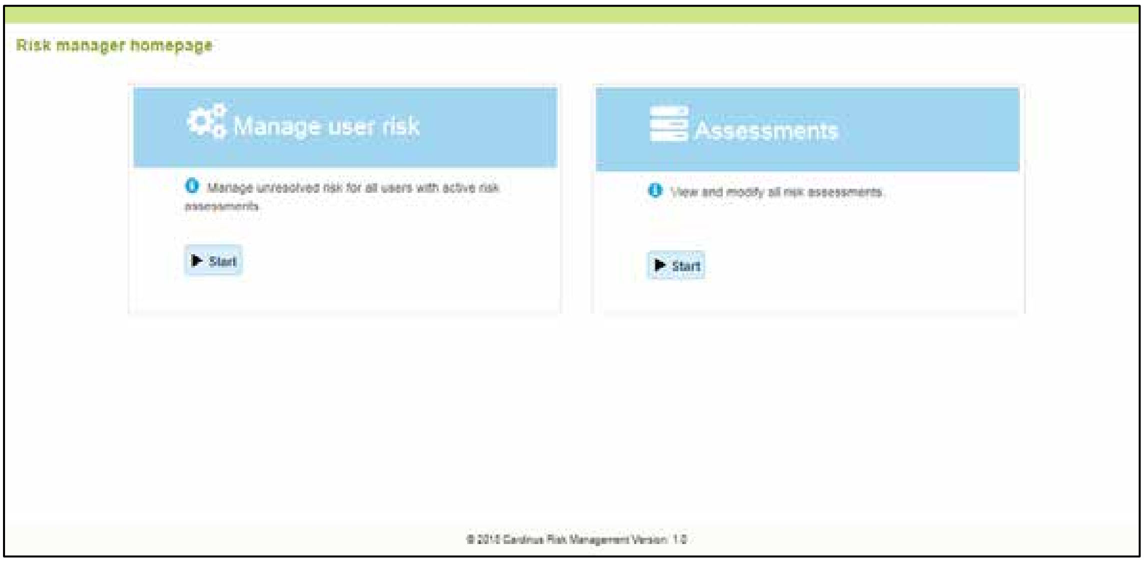
- The date of their **Most recent assessment**

- Their **Overall risk**
- The **Number** of active risk assessments they have

Click **Modify** to view the user's risk in more detail. (See section **4.3** for more details on managing the risk assessment.)

4.2 Viewing Individual Risk Assessments

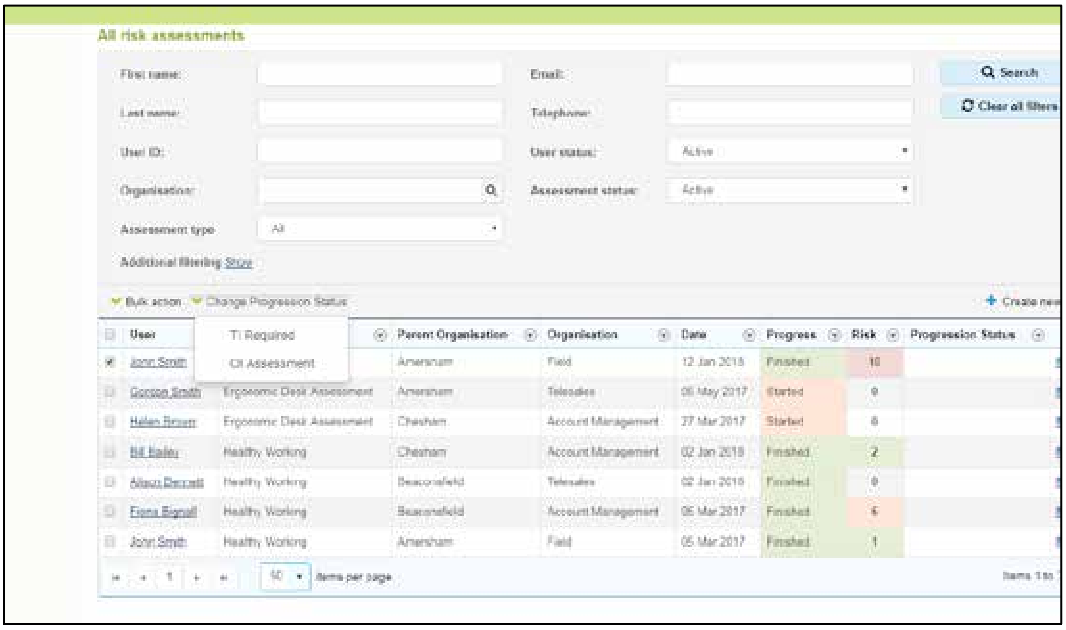




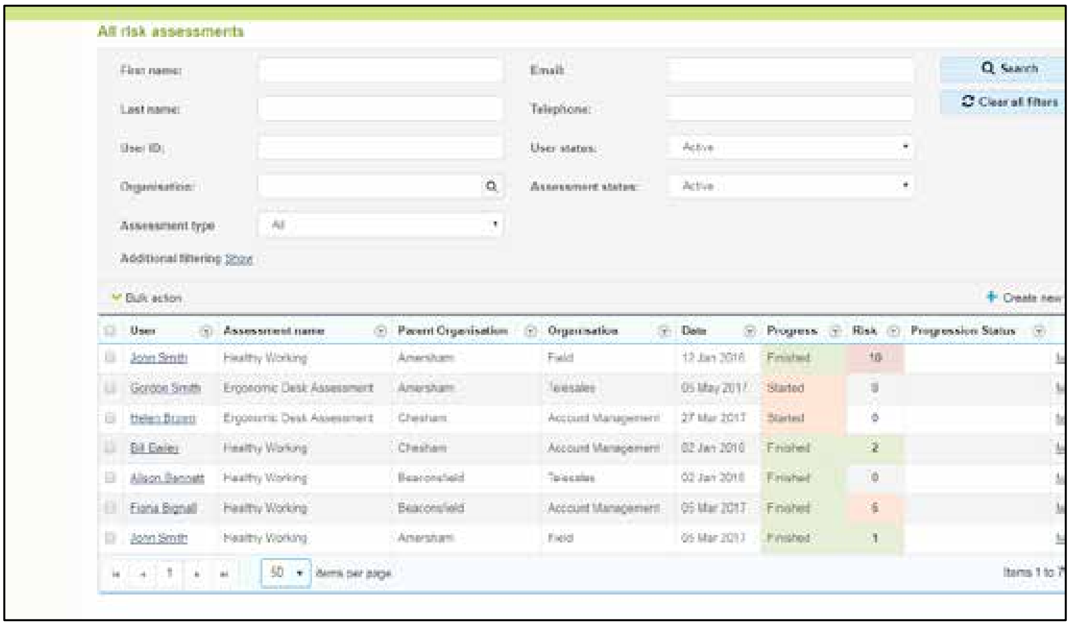
As mentioned in section 4.1 if you wish to check on the progress of risk assessments that have been allocated a progression status it will be easier to click Start on the **Assessments** link. This will bring up a list of assessments sorted by latest date completed.

In this list is a risk assessment with current risk 10 and it may be that a Telephonic (TI) intervention is required if the user has health or other issues.

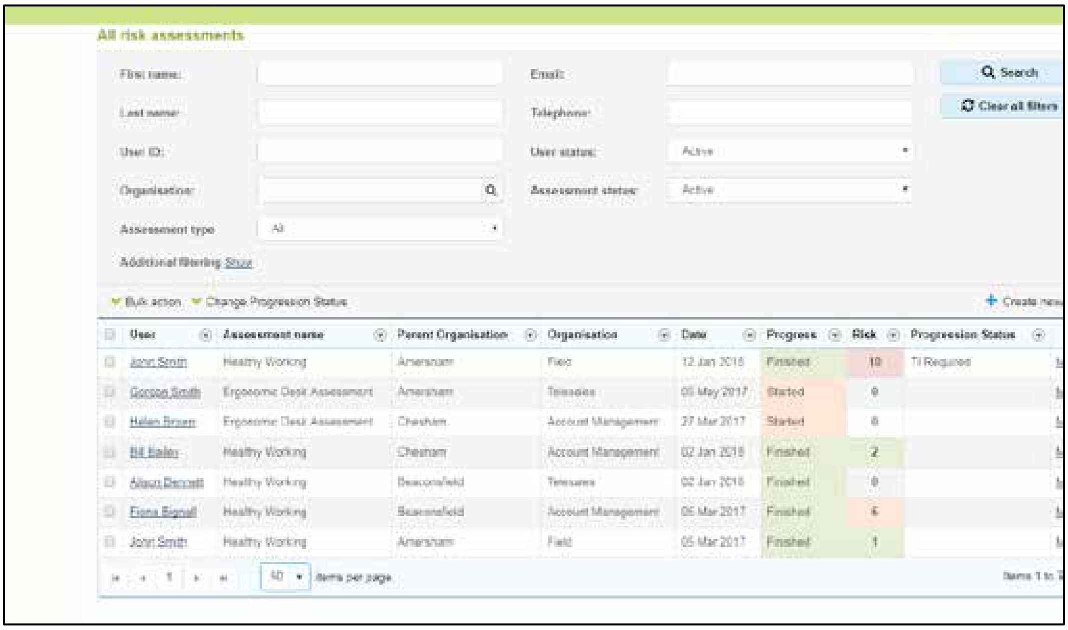
To set this status click in the check box to the left of the record you want and select the drop down menu for progression status. In this case John Smith's record has been selected.



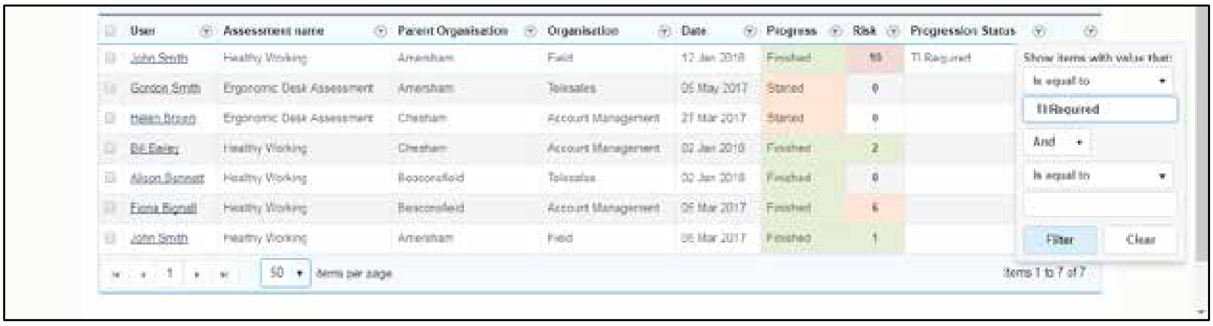
By selecting TI Required as the status and returning to the previous screen this can be identified in the list.

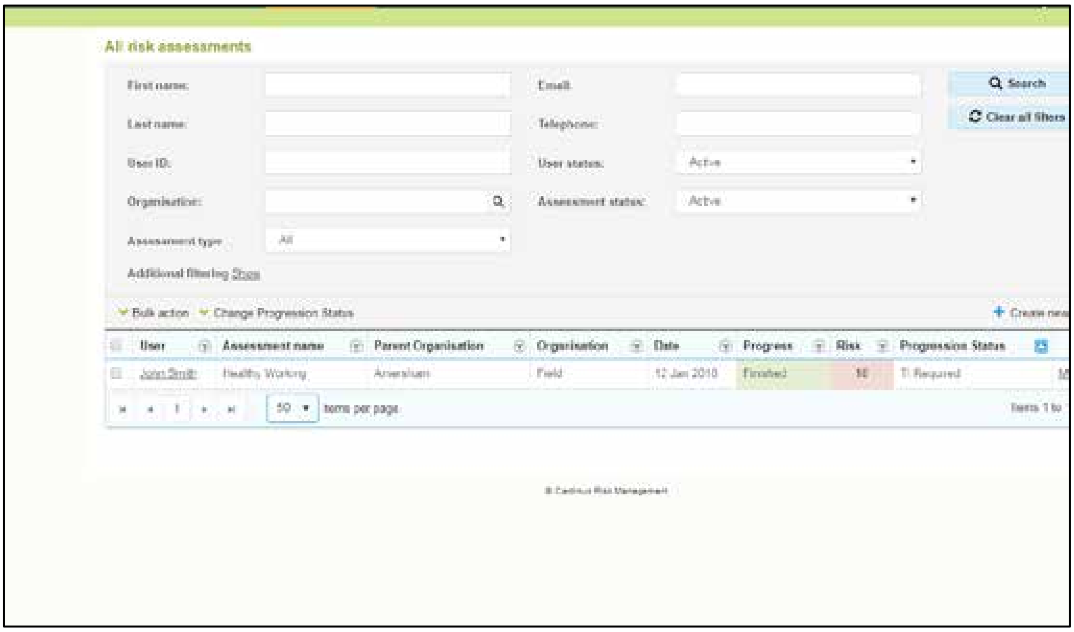


It can then be searched for using the filter on progression status.



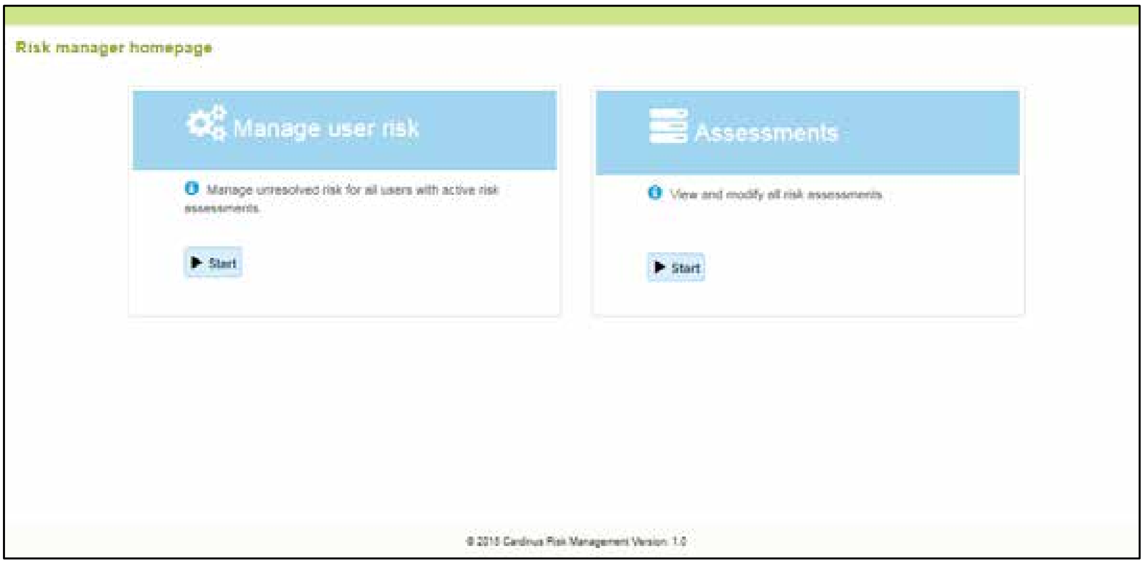
This filters only the record(s) with that status and makes it easy to track records that need attention.





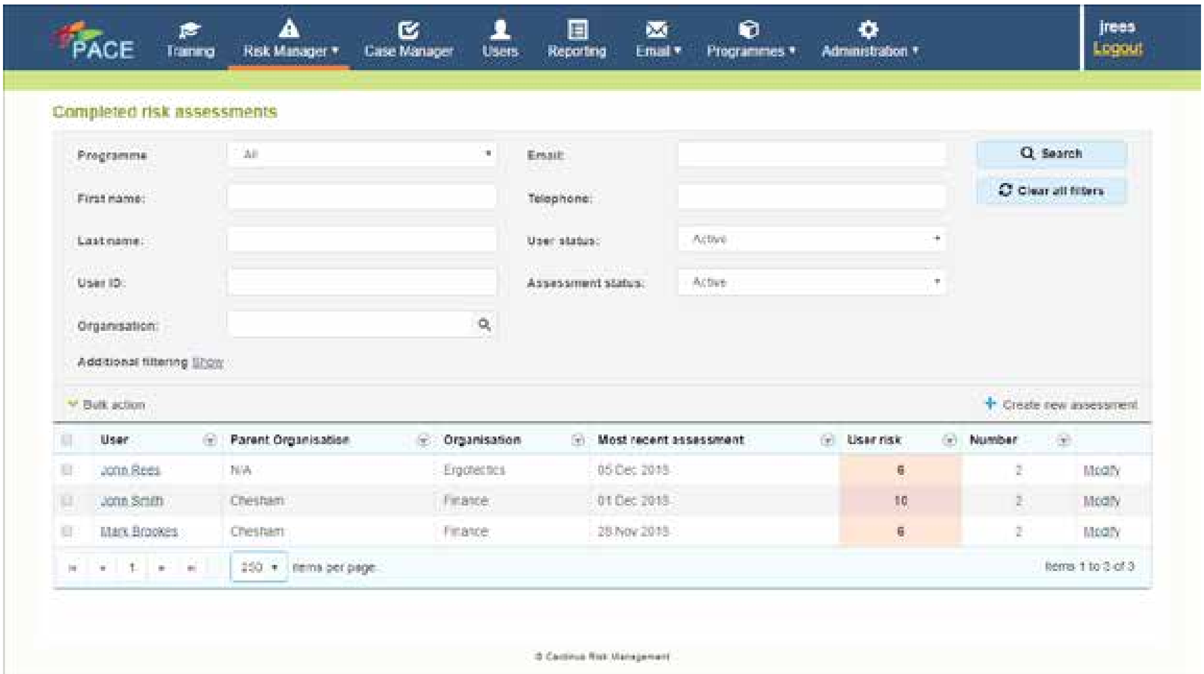
4.3 Managing User Risk

As shown in Section 4.1 to enter the User risk screen click on the **Risk Manager** menu and then on **Manage** user risk.

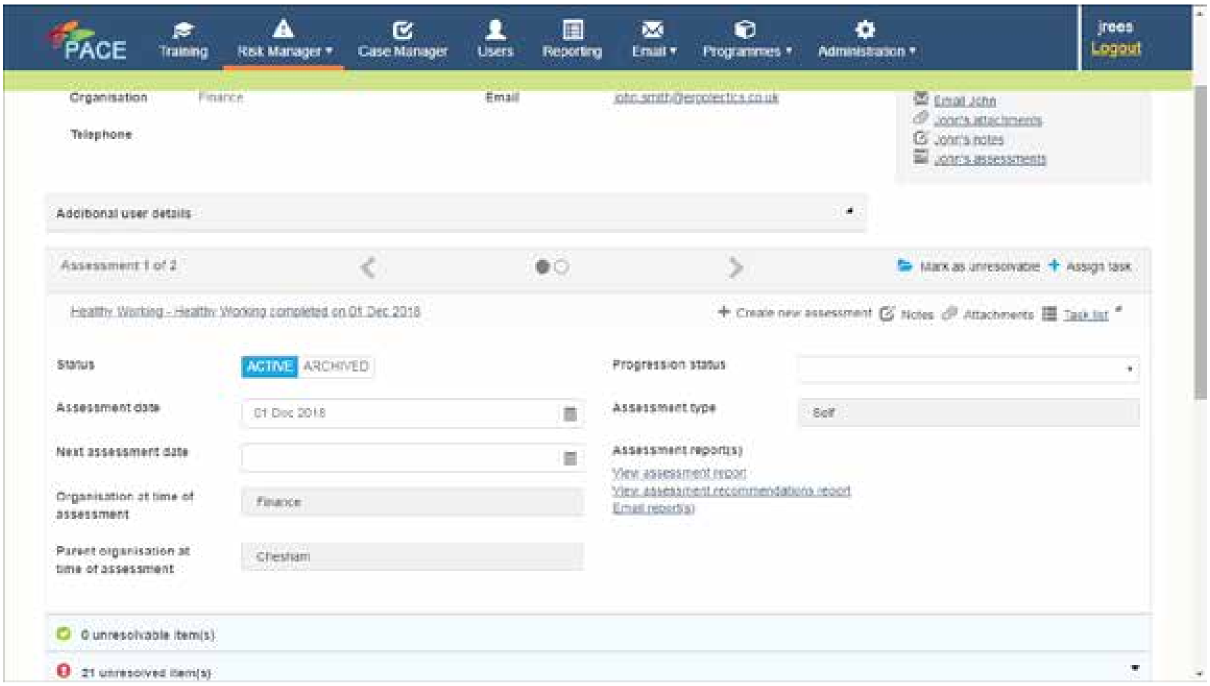


4.3.1 View the Risk Assessment Detail

You will then see a list of users and you can click on **Modify** to the right of the user to view the risk assessment in more detail. In this case John Smith has been selected.



Clicking on Modify next to the record will show John Smith's risk profile.

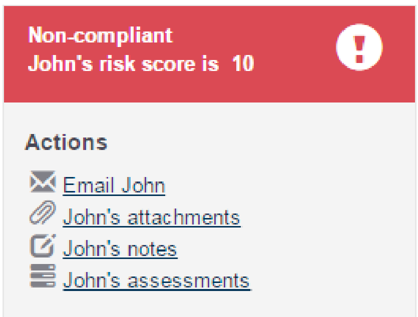


The default view for user risk is to show any unresolved items along with those that have been resolved and anything that is deemed to be 'unresolvable', '21 unresolved items are shown'. Whilst it is possible to view risk assessments in their entirety from this screen – see below – the default view is limited to those areas that need attention.

The top section of the screen holds basic user details. Click **Name** or **User ID** to access their User Record.

Clicking the **Email** address opens the standard **Send an email** screen, with the selected user already in place as a recipient. **Email user** opens the standard **Send an email** page.

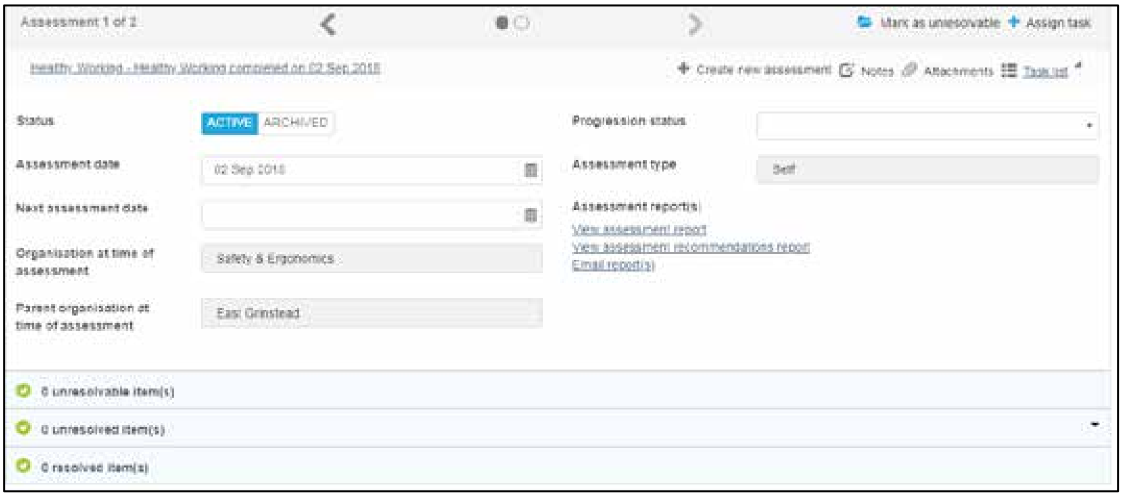
Attachments allows you to view any documents or photographs that have been attached to the User record
User Notes opens the notes section from the User record.
User assessments opens a list of active assessments for that user.



On the right-hand side of the screen a box displays the current compliance status of the user, along with their current overall risk score. This will be the highest score for all assessments listed. If the user has unresolved risks that have not been marked as Unresolvable, then this box will state that the user is currently non-compliant and display on a red background. Where there is no resolvable risk to be marked as resolved, the user will be considered compliant and will display on a green background.

Below the compliance status and risk score, there are links for common actions that you might want to take with regard to the user's risks:

If the user has more than one active risk assessment, you can switch between them with the controls at the top of the risk section (see screenshot below). Clicking the arrows switches between assessments, but you can also click the central circles to change from one to another.

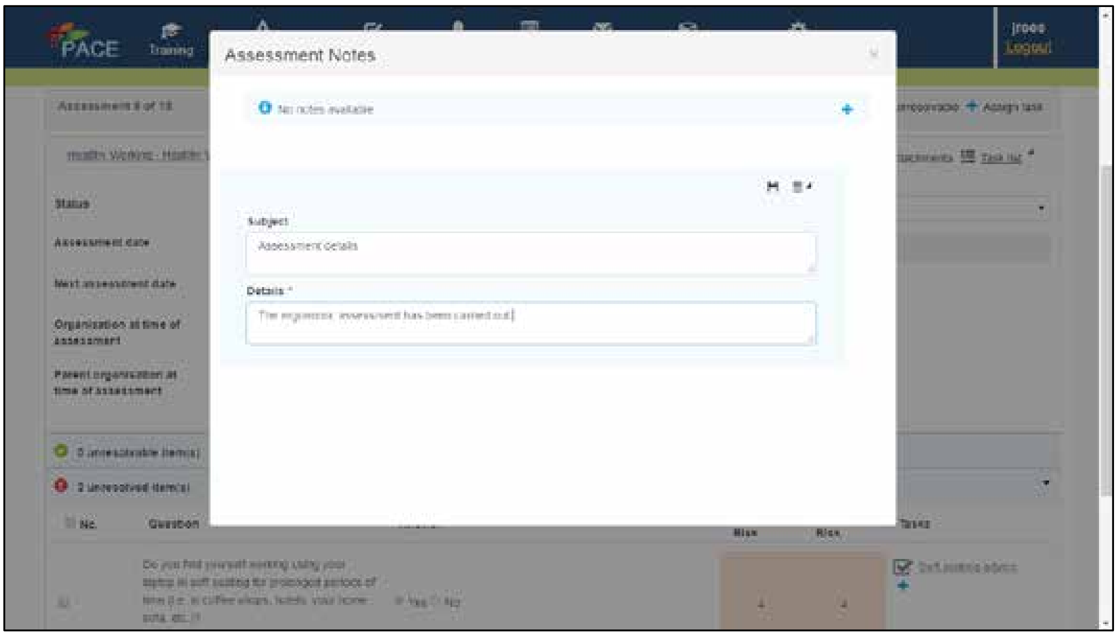


The assessment title is displayed as a link (see "Healthy Working completed on 02 Sep 2018" in the image above) – clicking that link gives you access to the entire risk assessment.

On this screen you will also have the ability to **Create a new Assessment** (Covered under section 4.6) or add **Notes** or **Attachments** to the risk assessment or to view a **Task list**.

4.3.2 Adding notes to the Risk Assessment

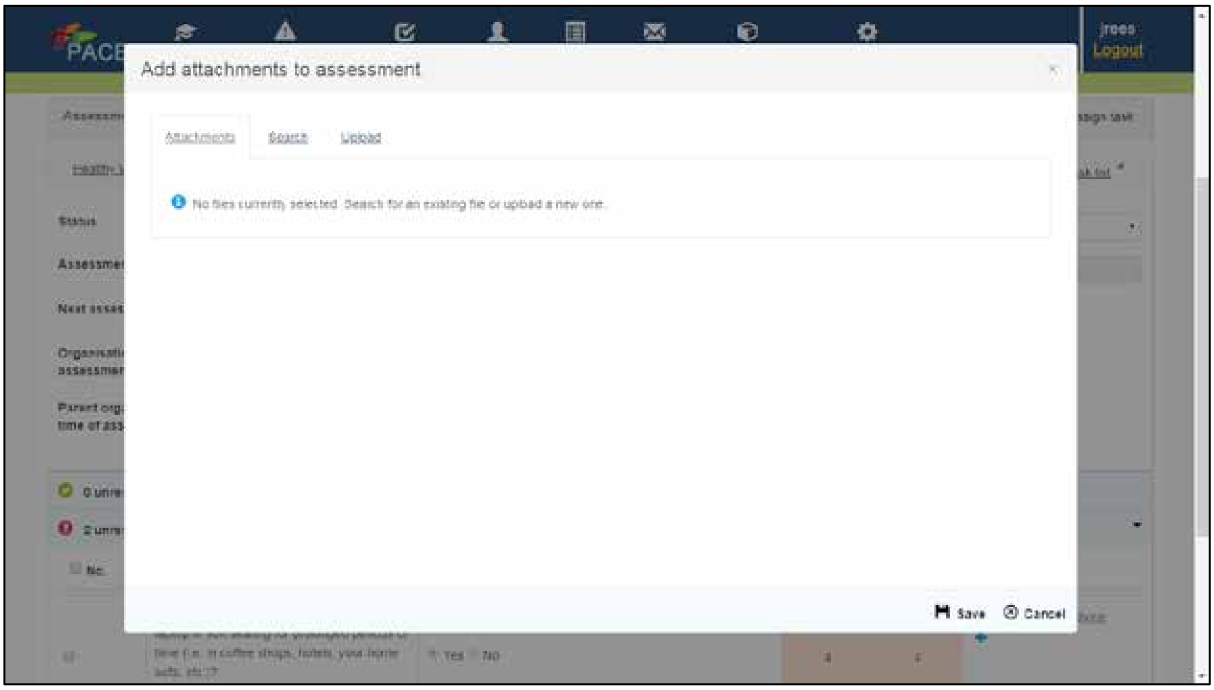
On clicking on the **Notes** menu at the top right a note can be added and saved and is indicated in brackets after the Notes heading.



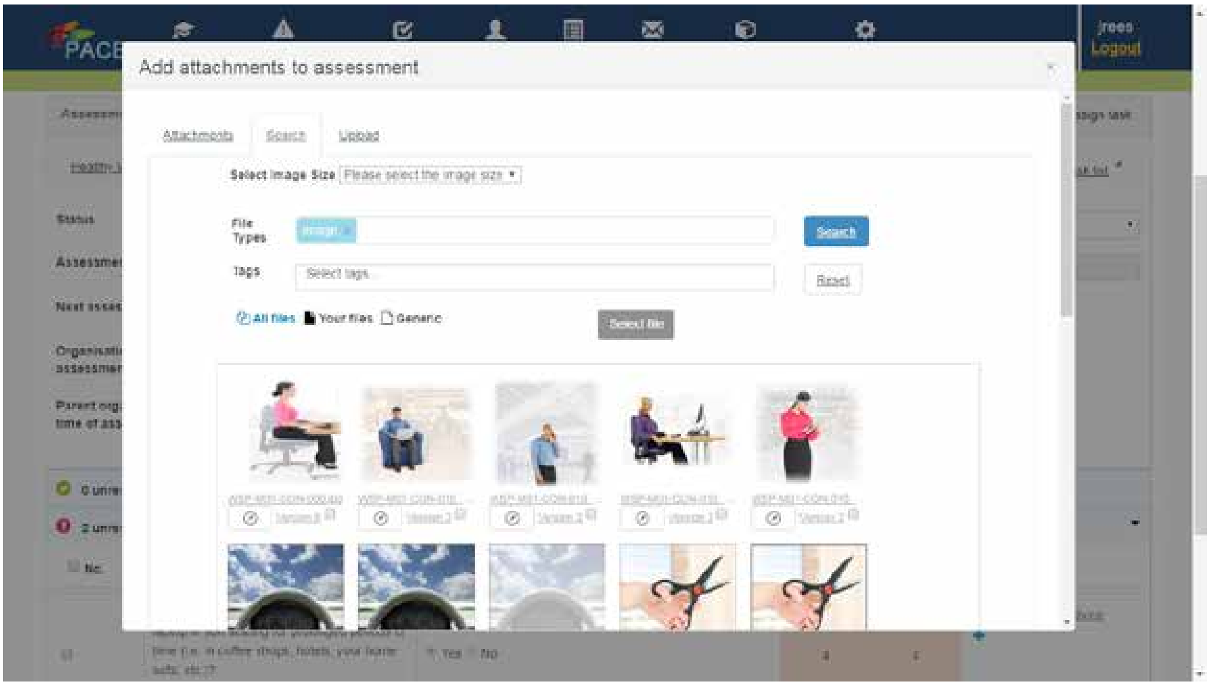
4.3.3 Adding attachments to the Risk Assessment

Attachments such as documents or reports can be added to the risk assessment by clicking on the attachments header.

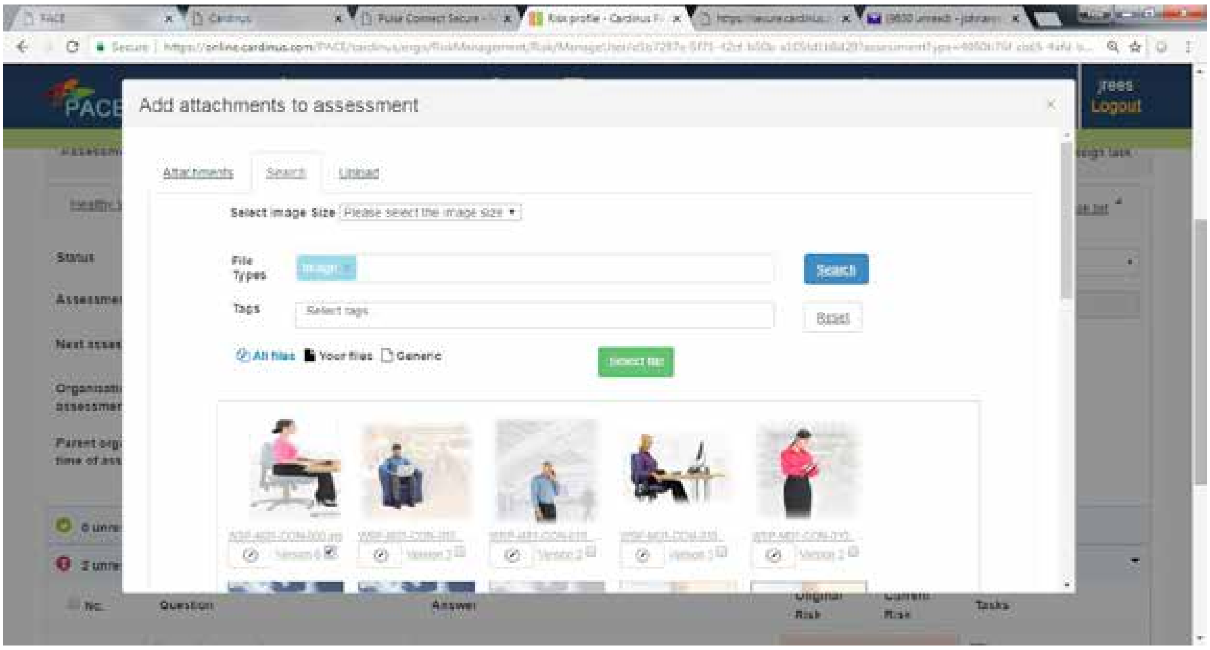
Attachments can be added from an existing bank of images by clicking on Search or from another file source by clicking on Upload.



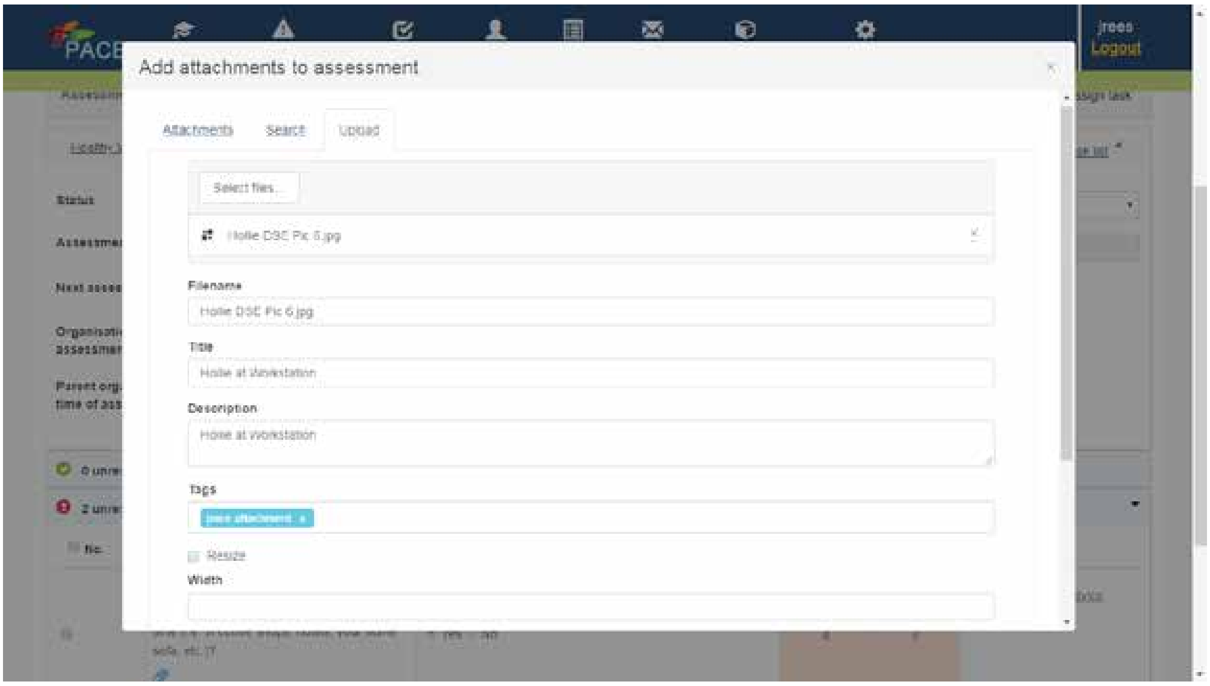
In the first case a Search will yield any images that are in the image bank.



Checking the box against an image that is required to be uploaded and then clicking on Select will upload that image to the assessment.

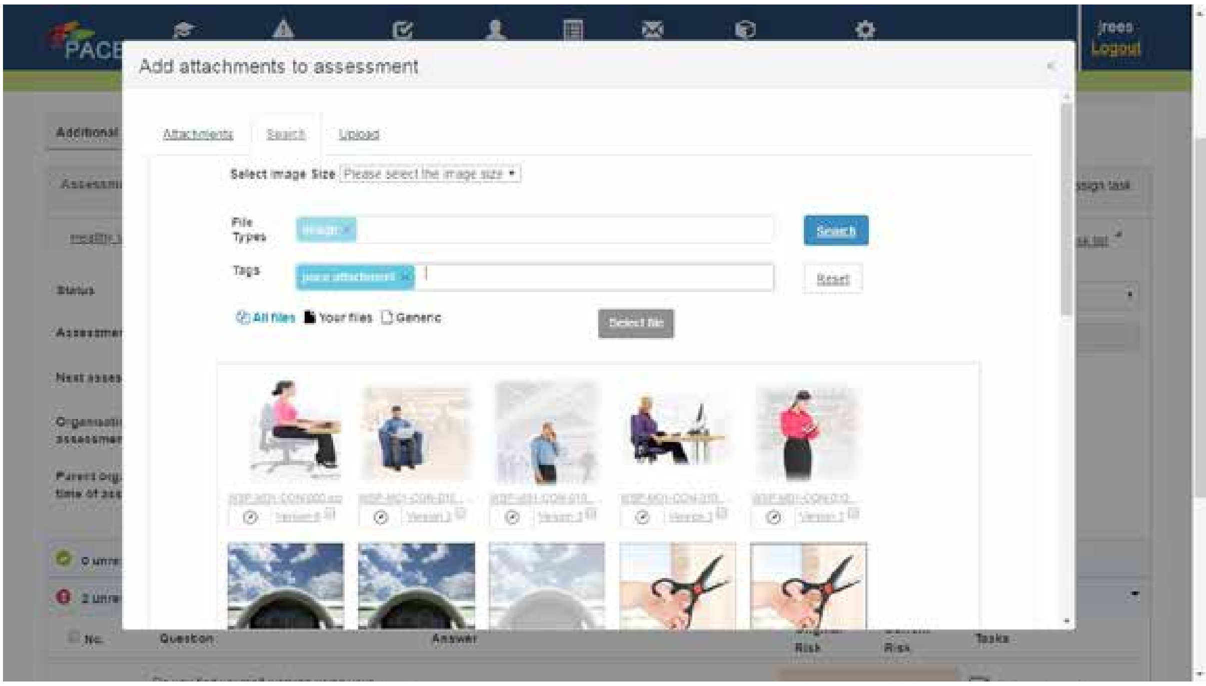


Alternatively a file can be uploaded by clicking on Upload and searching the relevant folder.



Once files have been uploaded they can be identified by a Tag. The default tag is PACE Attachment.

Tags can be used to identify which attachments have been uploaded.



If the **PACE attachment tag** is used then it filters the files that have been uploaded for use as attachments.

These files can then be selected and uploaded as attachments. Remember to click on **Save** after Upload to ensure that file is uploaded correctly.

4.3.4 Risk Classification

Risk is split into three sections, to access these click on the drill down icon on the left hand side of the screen, adjacent to the type of risk:

Unresolvable risk

These are risks which have not been resolved despite all reasonable attempts to mitigate them. The risk continues to count towards the user’s overall risk score. It is different from Unresolved risk in that no further actions are expected or required.

Unresolved risk

Risks which have not been resolved and further action can still be taken. Risk management focuses on unresolved risk and what can be done to mitigate them.

Resolved risk

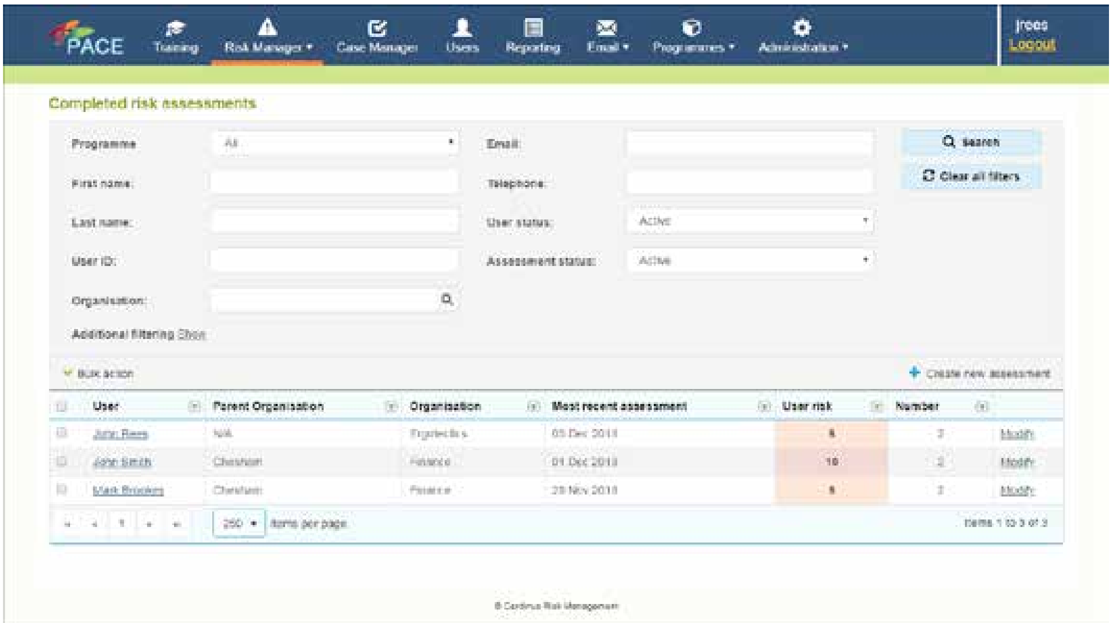
Risks marked as “resolved” have a Current Risk of 0. The risk no longer exists.

Risks are classified also as High (7-10), Medium (4-6) and Low (1-3). Zero risk is represented by grey.

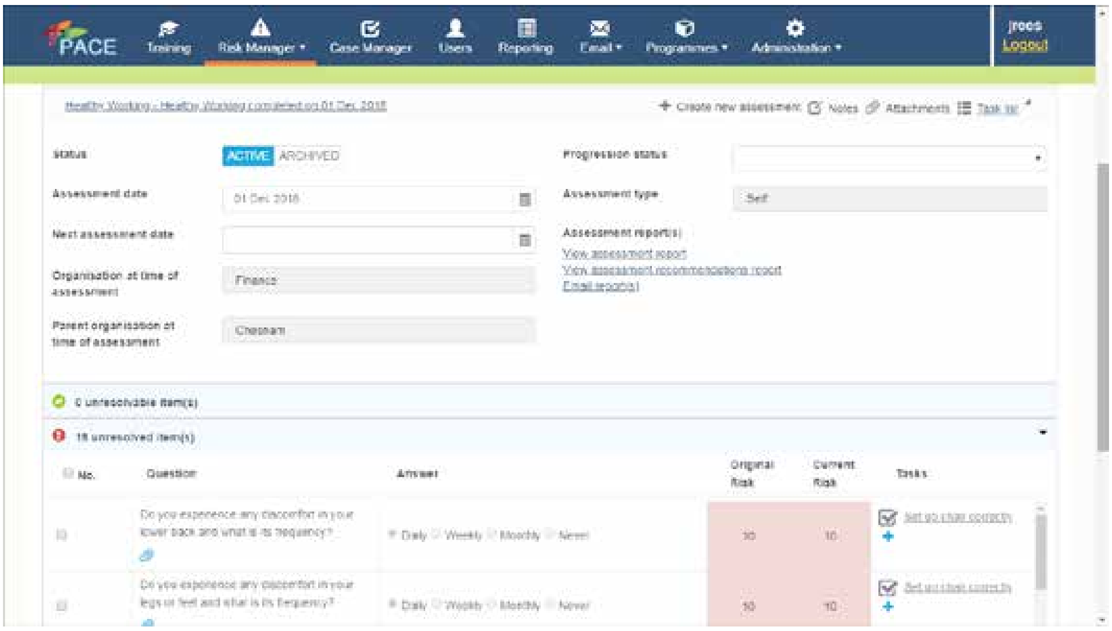
4.4 Task Management with User Risk

4.4.1 Assigning a Task to a single risk

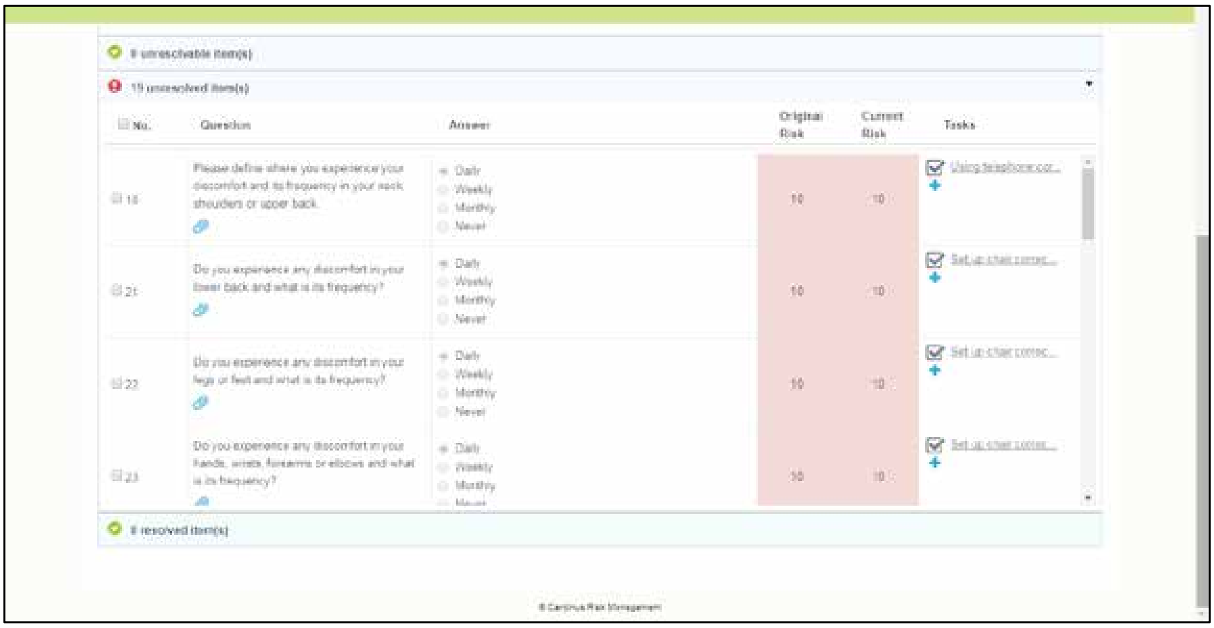
We start by selecting the user risk profile and then the risk assessment that we want to examine if there is more than one. In the example below we are going to select John Smith.



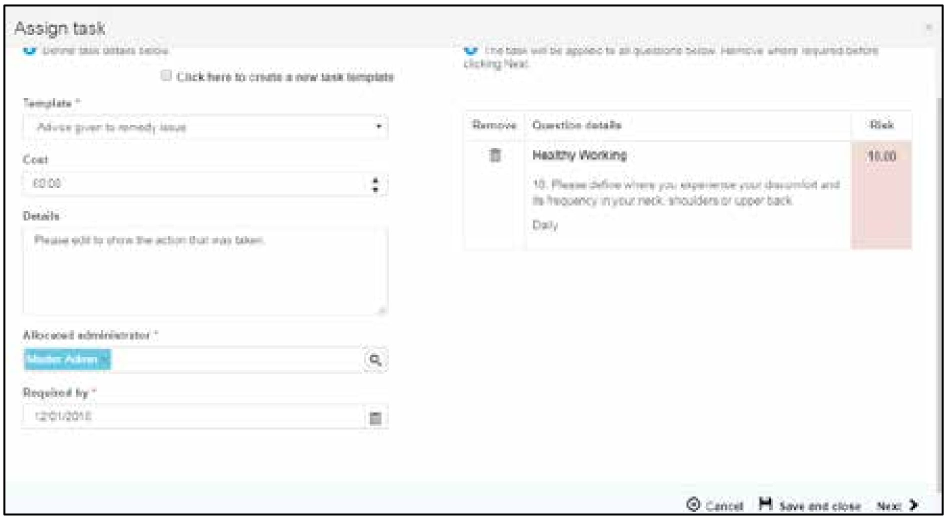
We can see that John Smith has a number of unresolved issues.



Risk is managed through the assignment and completion of Tasks. The simplest way to assign a Task to a risk is to click the **+** in the **Tasks** column for the risk. This opens the **Assign task** screen. In the case below we have clicked against Q18 regarding neck pain.



In the **Assign task** screen start by choosing your **Template** – these are pre-defined Tasks with clear, plain language names. Select the template whose description most closely matches the action you have taken (or are going to take) in response to the risk.



If you wish, you can provide a **Cost** for the task – this is reportable information that can be used to track the costs incurred mitigating risks.

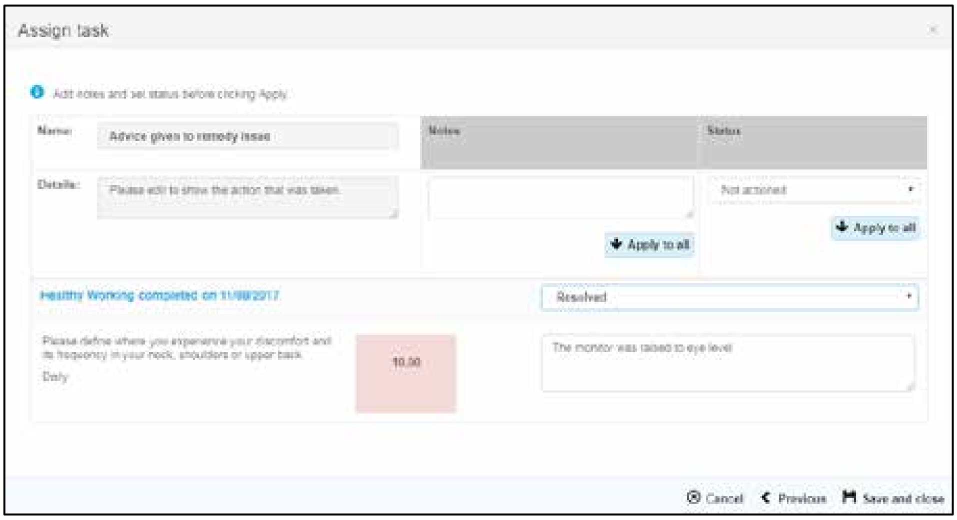
Some tasks have associated **Details** that automatically populate when you select the appropriate template. You can edit the **Details** box manually and should make sure that it accurately represents the action you have taken or are intending to take in relation to this risk.

Allocate administrator is used to nominate the PACE Administrator who is responsible for the task. This is not necessarily the person who will physically complete the actions required – it is the person responsible for ensuring that it is properly recorded in PACE. The Administrator chosen here will see the task in their **Case Manager** and will receive notifications on their home page if the task is not completed by the **Required by** date.

You must now provide a date:

Required by date. This is for tasks that are not yet complete, or the effects of which are not yet known. The **Required by** date acts as both deadline and reminder that further attention is required. If the task has already been completed then enter the date that it was completed.

Click **Next** to complete the process of assigning your task.



You have the option here of providing extra **Notes**. In the case of a single risk you can put the notes in the box to the right of the risk. In the case of multiple issues you can use the box above and select **Apply to all**. What you will certainly want to do is select an appropriate **Status** (see list below).

Possible task statuses:

Not actioned
The default status. Nothing has yet been done.

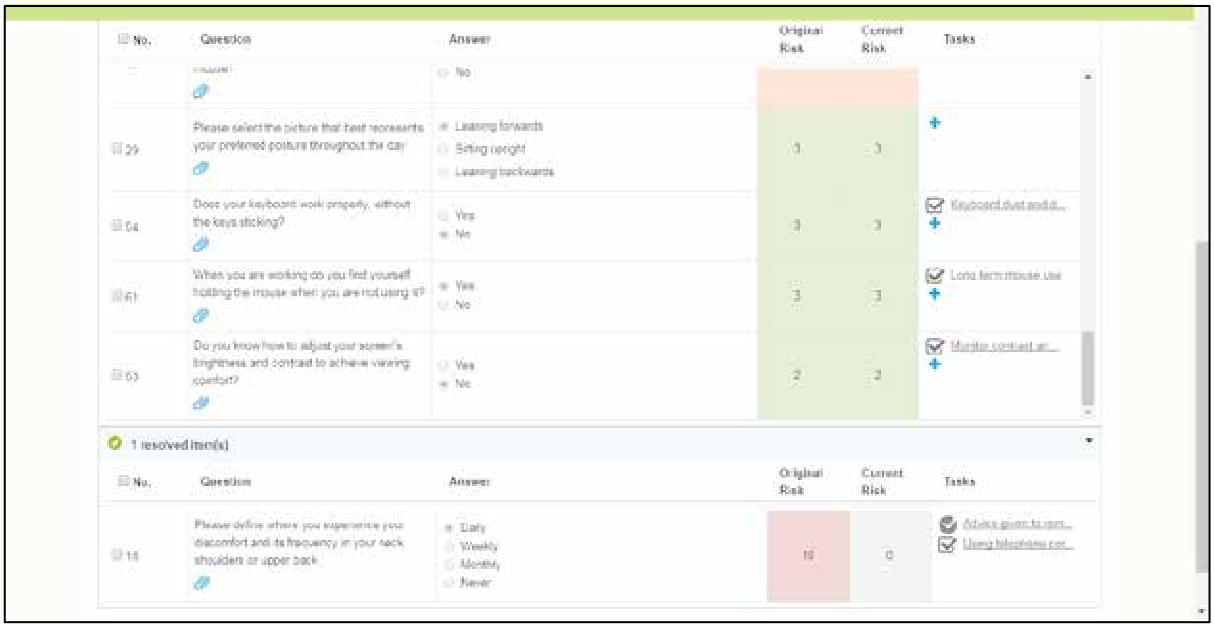
Actioned
Action has been taken, but the effect is not yet known. It is assumed that the task will be updated later.

Improved
Records that the task has improved the situation but it has not completely eliminated the risk. The risk score can be modified to lower the risk to a more appropriate level.

Resolved
The action described in the task has eliminated the risk. The Current Risk score drops to 0.

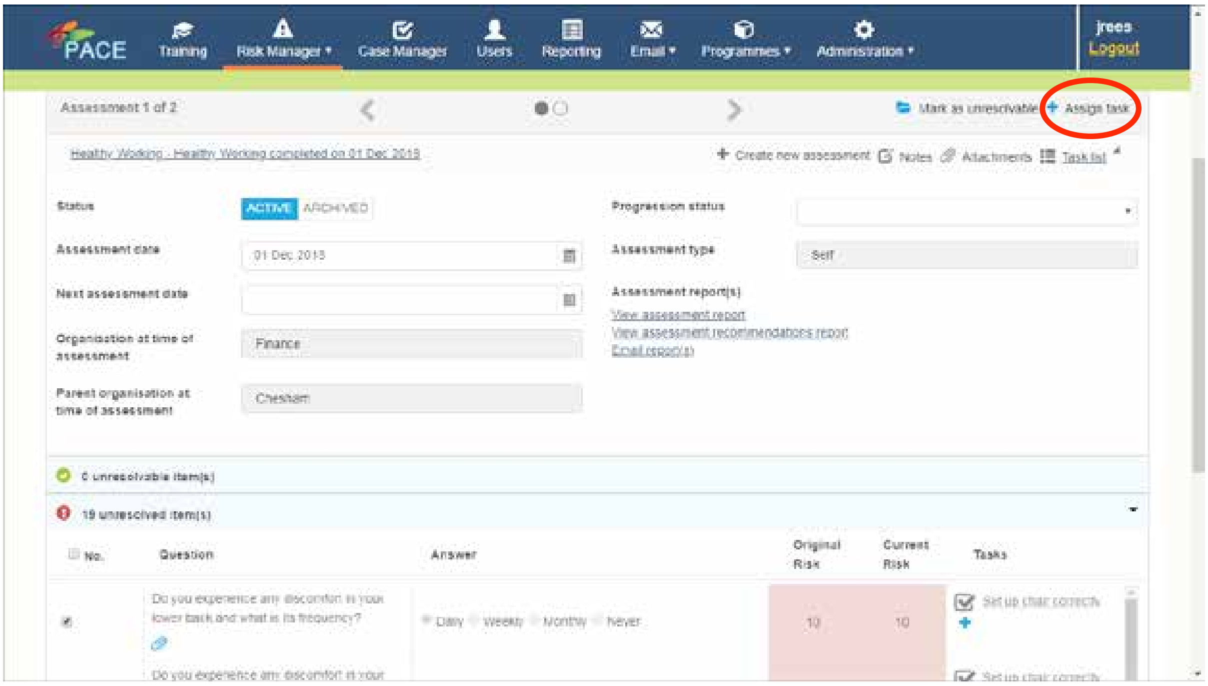
Does not resolve
The action described in the task had no effect on the risk.

Once you have added the status click **Save and close**



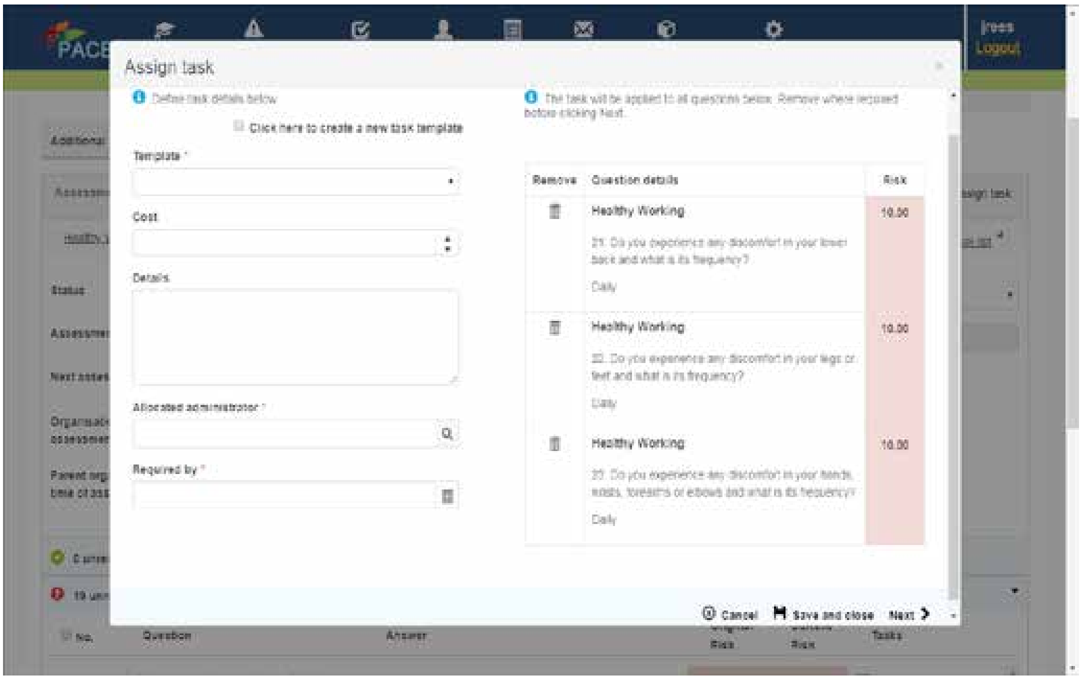
You can now see your Task alongside the risk question 18, in this case it is in the 'resolved' section and it now shows the Original risk as 10 and the Current risk as 0.

4.4.2 Assigning Tasks to multiple risks

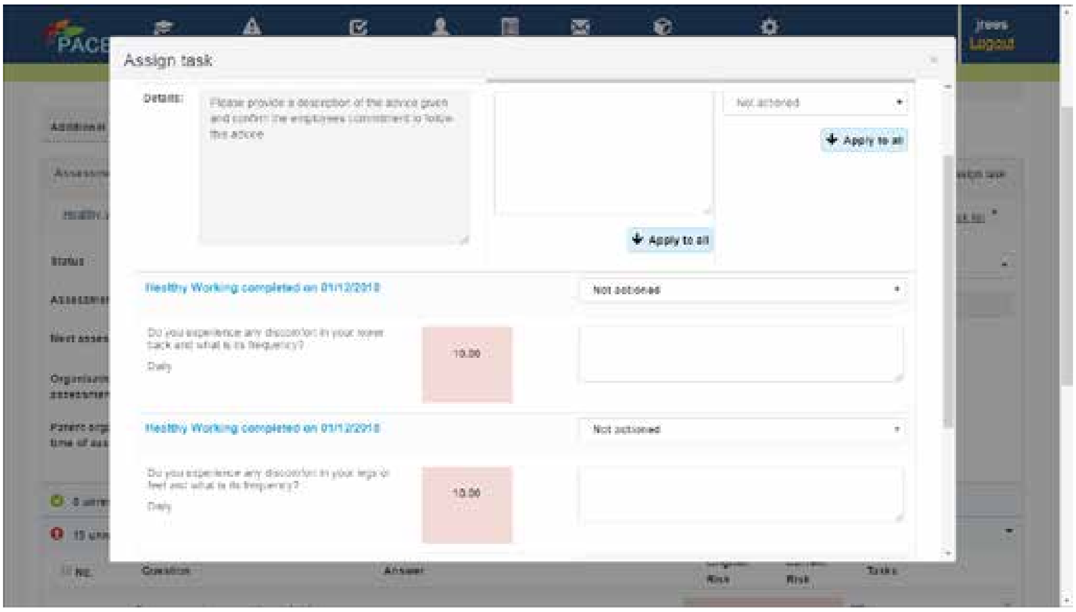


You can assign the same task to multiple risks using the check boxes beside the risk number. Select all the risks to which the task applies and click **Assign task** in the header bar (circled in red).

The **assign task** screen is similar to the one we saw when assigning tasks to a single risk – the only difference is the list of questions on the right-hand side. You can click the trash can icon in the **Remove** column if you want to take any risks out of the list.

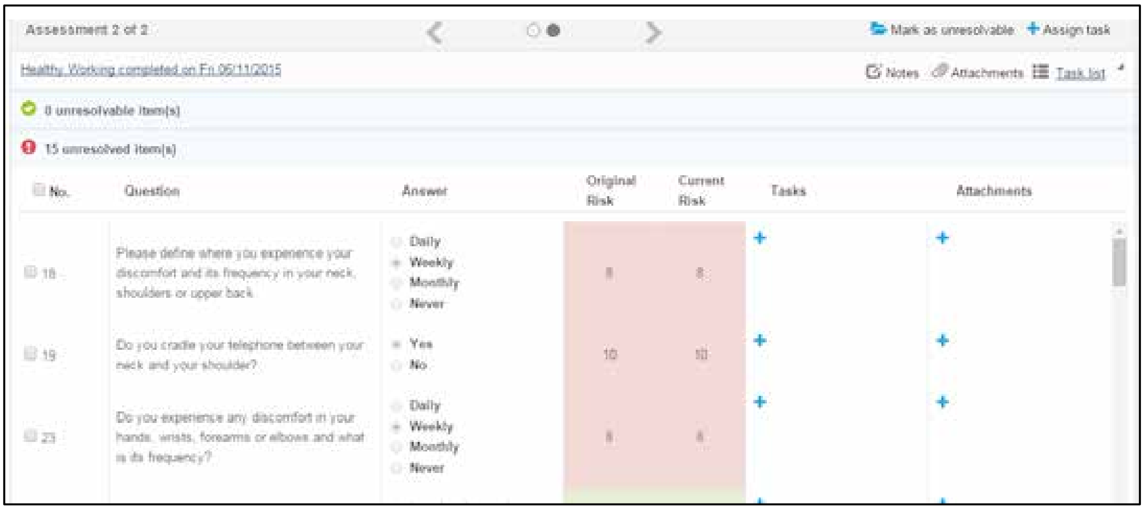


Complete the relevant fields as described above for single risk tasks and click **Next**



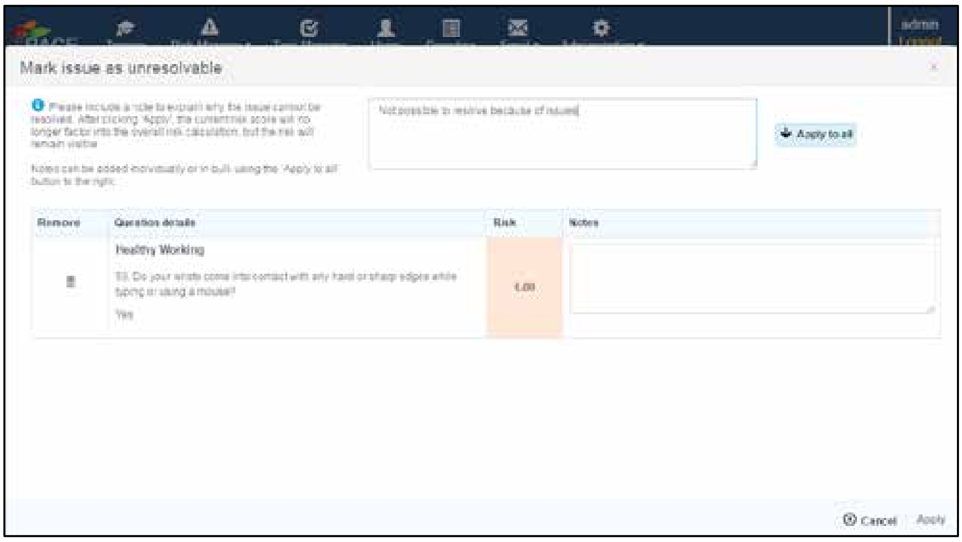
The second screen is for applying notes and setting statuses. Use the top section if you want to apply the same notes and status to all selected risks. Use the bottom section, where the risks are listed individually, if you want to apply different notes or statuses to different risks.

4.4.3 Unresolvable Risk



Risks can be marked as Unresolvable using the check boxes beside their question number. Select all the relevant risks and click **Mark as unresolvable** in the header bar.

> **NOTE - It is expected that an unresolvable risk will have at least one task already assigned to it and completed by the user in their Healthy Working Plan to say it was not possible to resolve it. – i.e. that there will be evidence that effort was made to resolve the risk before it was written off as unresolvable. The setting of the unresolvable status means that the user will not get reminders to complete actions even though there remains a risk.**



When you click **Mark as unresolvable** you are confronted with the dialogue box pictured above.

You must provide an explanation for why you consider the risk unresolvable.

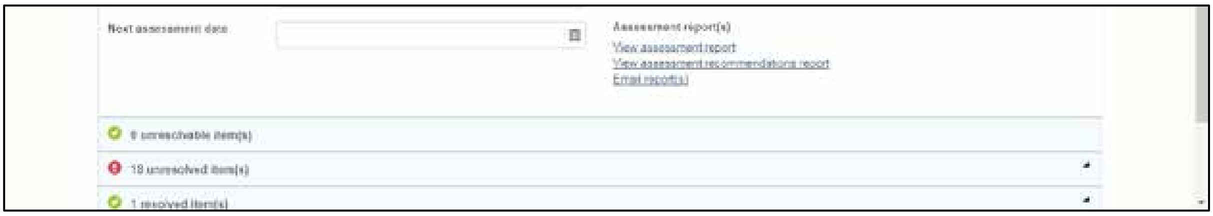
If you are marking multiple risks at the same time you can choose whether to apply the same notes to all risks or provide each risk with a separate note.

Click **Apply** to mark the risk(s) as unresolvable.

Underneath each unresolvable risk is a link which displays the notes created when the risk was set as unresolvable. Clicking that link allows you to edit those notes and it also enables you to change a risk from **Unresolvable** back to **Unresolved**.

4.5 Reporting in Risk Assessment

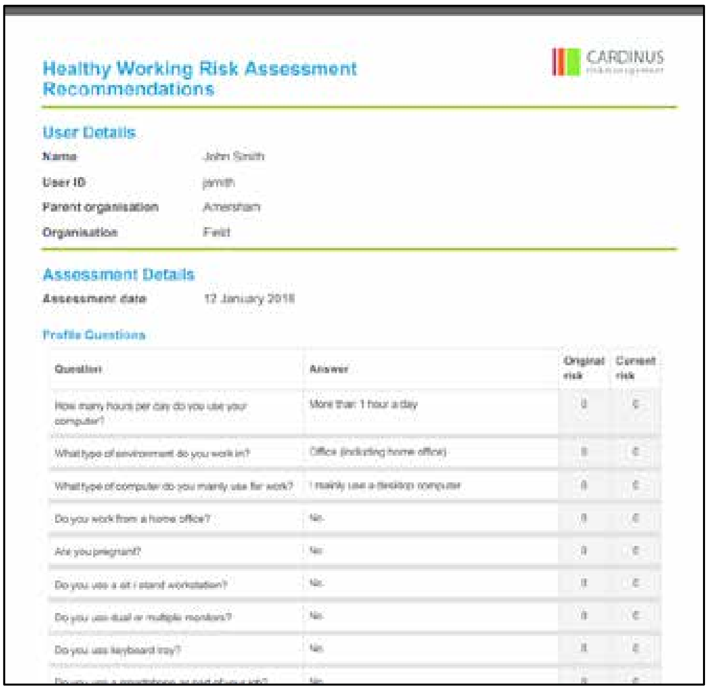
Within each risk assessment there is the ability to run a report and email that report. The reports are accessed from the Risk profile screen as shown below.

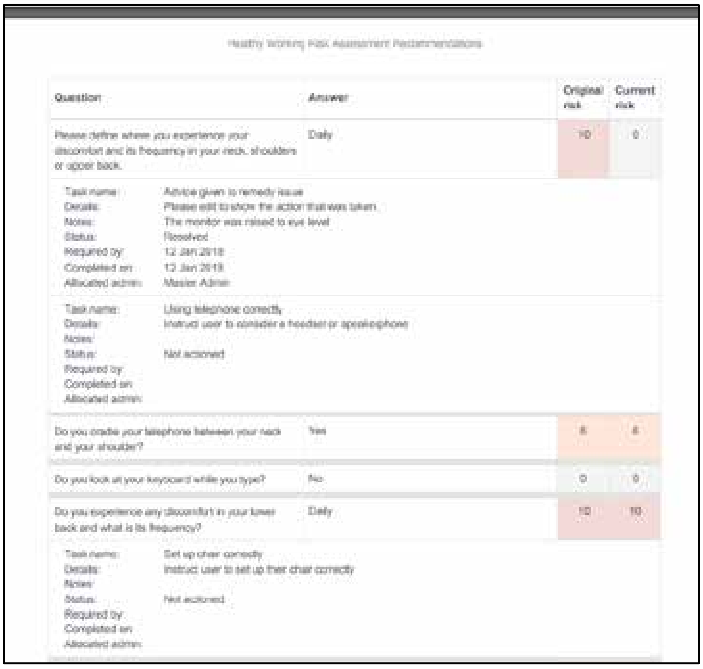


There are two reports that can be run:

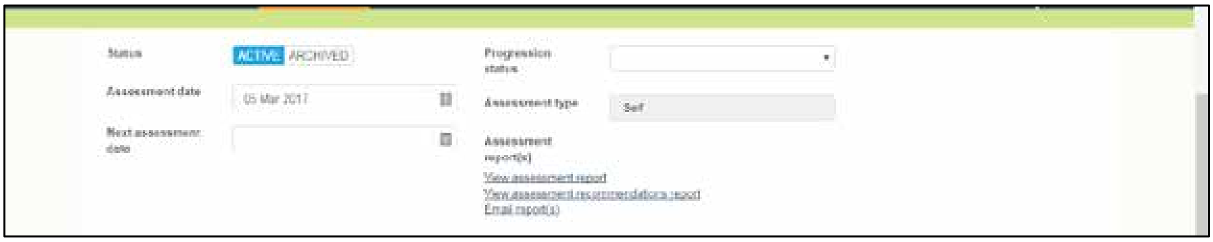
The **Assessment report** shows original and current risk for each question in the risk assessment.

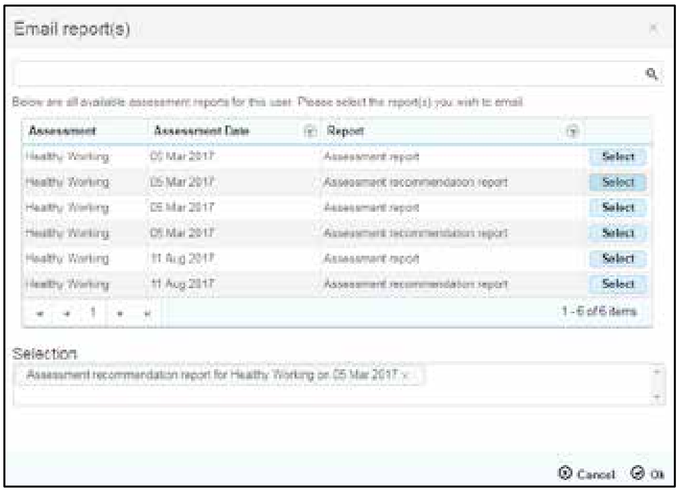
The **Assessment recommendations report** also includes the notes that have been added in the Assign task section and can be used as the basis of a working document or completed assessment that can be emailed to the user or their manager.



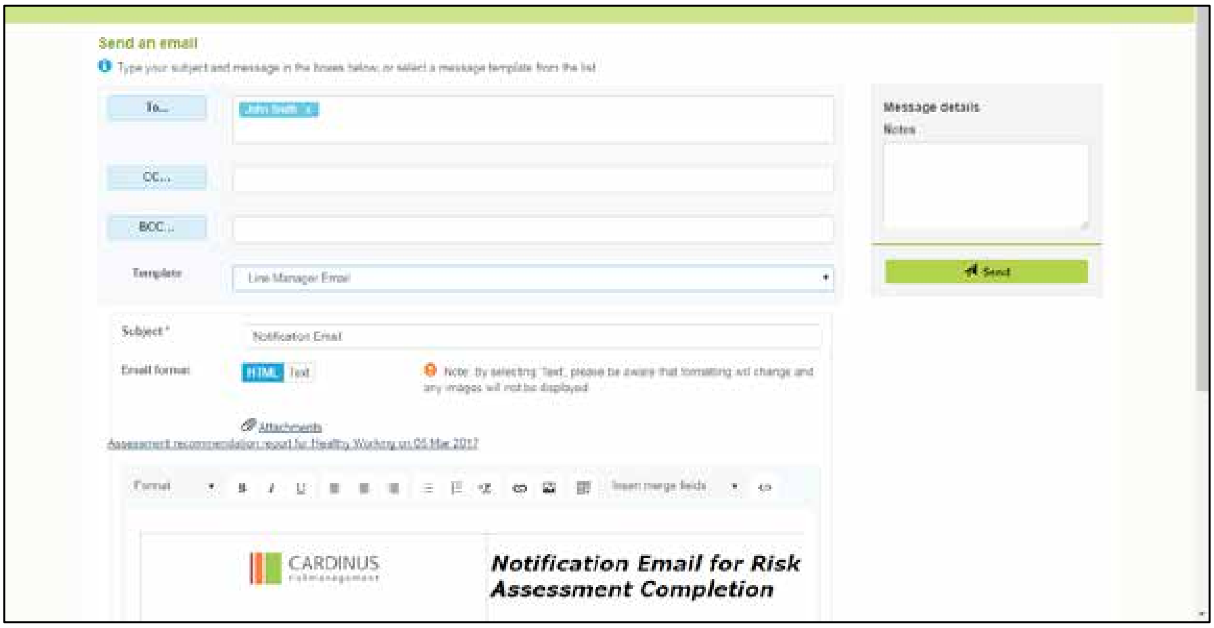


By clicking on Email report a list of available reports appears.





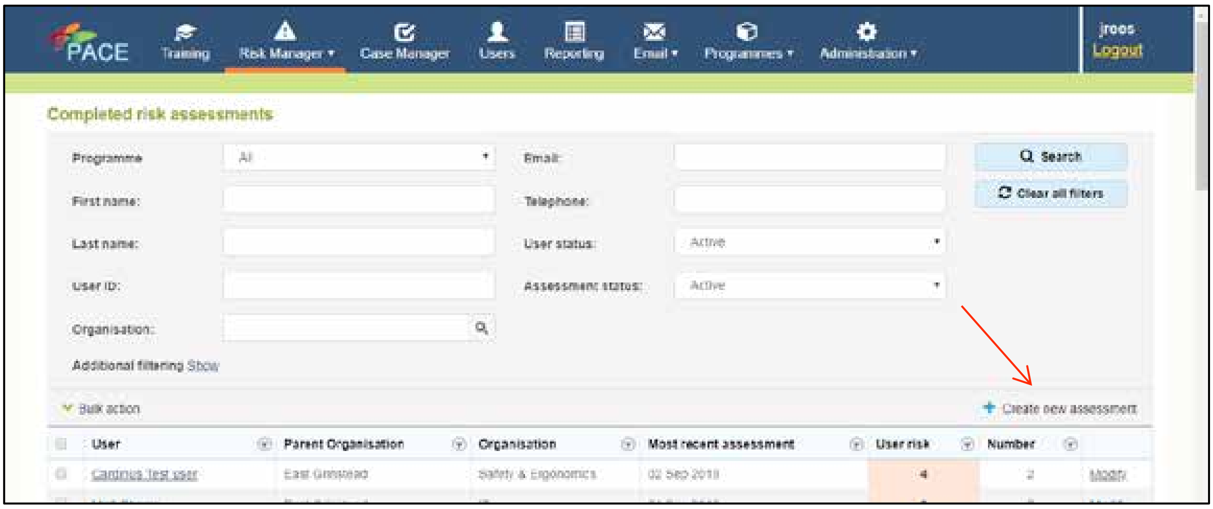
Selecting the report then attaches it to an email and it can then be sent using a suitable email template.



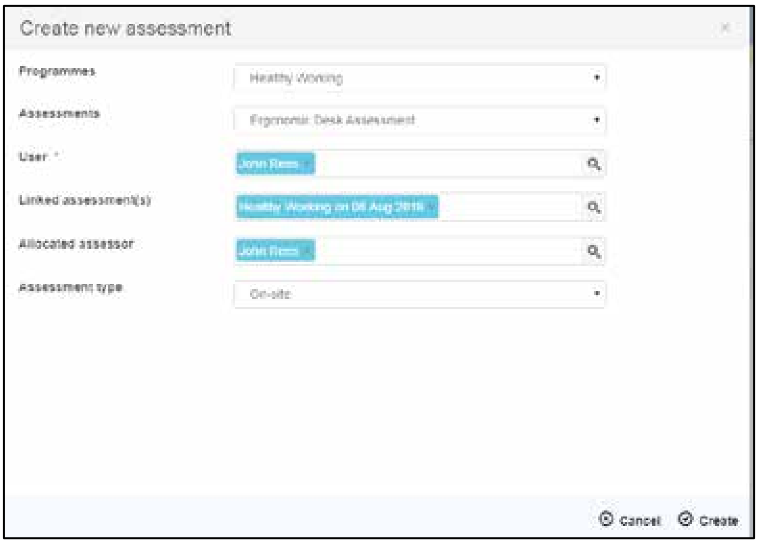
4.6 Ergonomic Desk Assessment

An ergonomic desk assessment (EDA) is an assessment that can be carried out by a competent assessor at someone's workstation. It has no automatic features such as in the self risk assessment created by the user so risk levels are set by the person who creates and manages the EDA. This implies that the person creating it must have a good understanding of ergonomic principles and how they apply to a user's workstation. The EDA once created is attached to the user's record.

An EDA is created from the **Risk Manager** menu by clicking on **Manage user risk** and then **Create new assessment** as indicated by the red arrow.



Clicking on Create new assessment will open a form to specify for whom the assessment has been created and which assessment it is linked to.

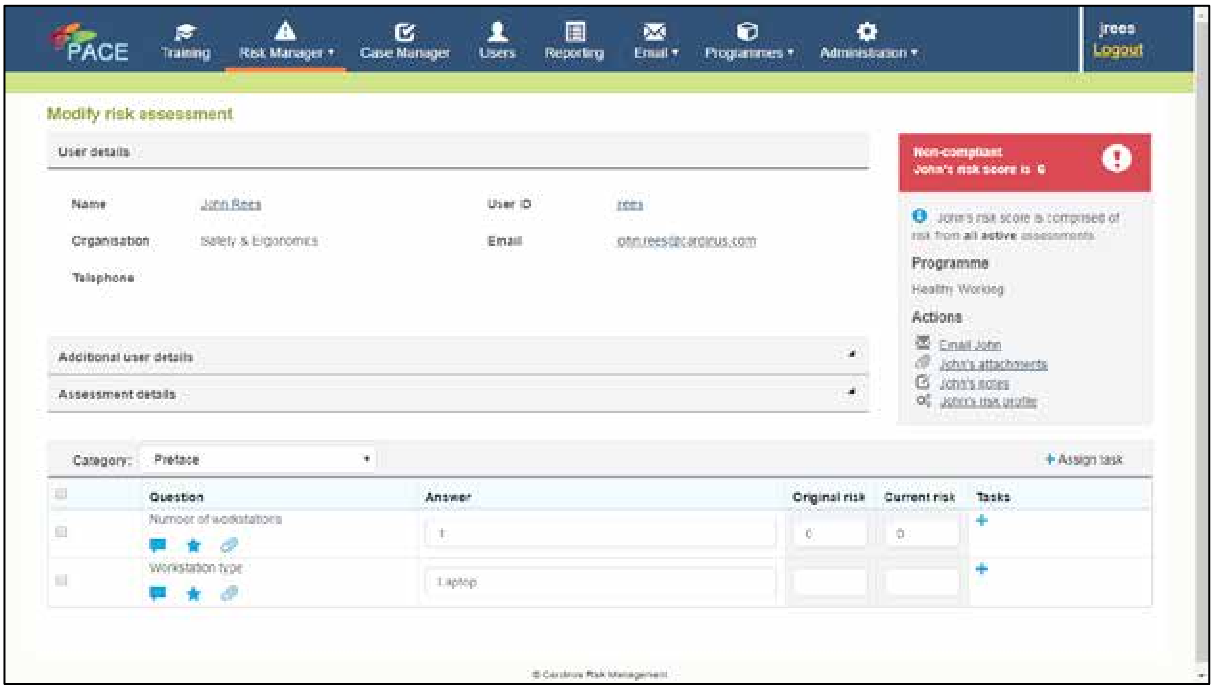


Once the basic details have been completed the EDA can be created.

As can be seen it has a number of sections, each of which allow you to enter free text descriptions and to set original and current risk level. The original risk level could be derived from the self risk assessment if appropriate.

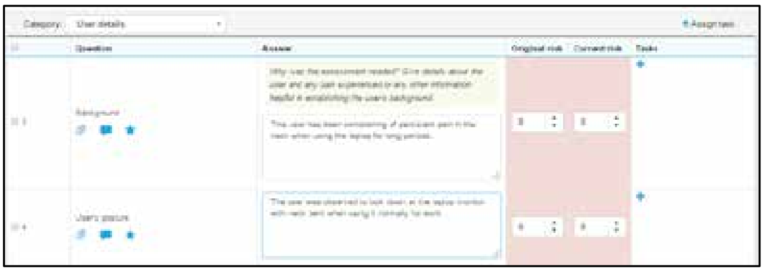
The sections are as follows with a blank form and an example of how each might be filled in.

Preface – Basic details of the number and type of workstations

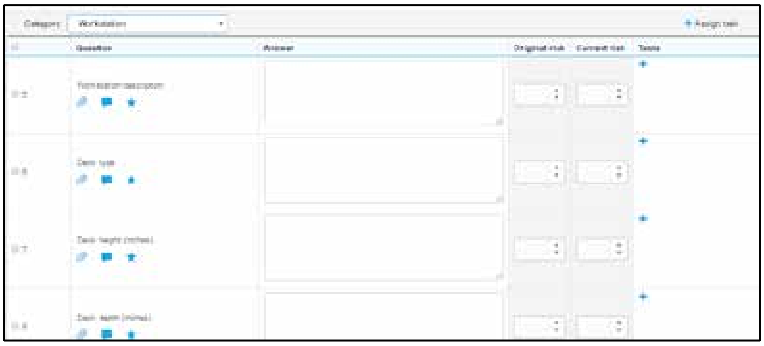


In this case it is a laptop that is being used without additional equipment such as a separate mouse keyboard and monitor.

User Details – Background to why the assessment is needed and an overall assessment of their posture.



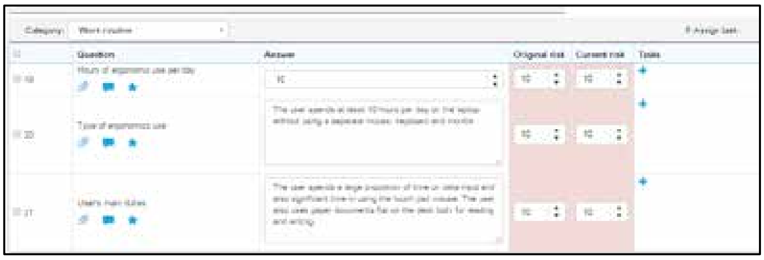
Workstation – a detailed analysis of the workstation set-up.



The various elements of the workstation are examined and notes are written about these. Original and current risk levels can be set so that it provides a working document.

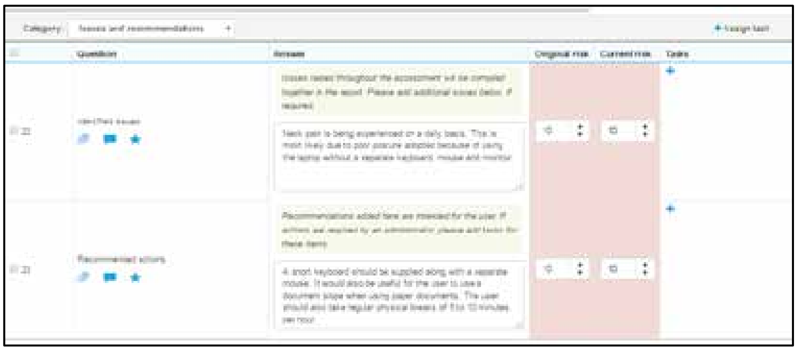
Work routine – the working practices of the user.

Detailed notes can be made and the appropriate risk levels set.

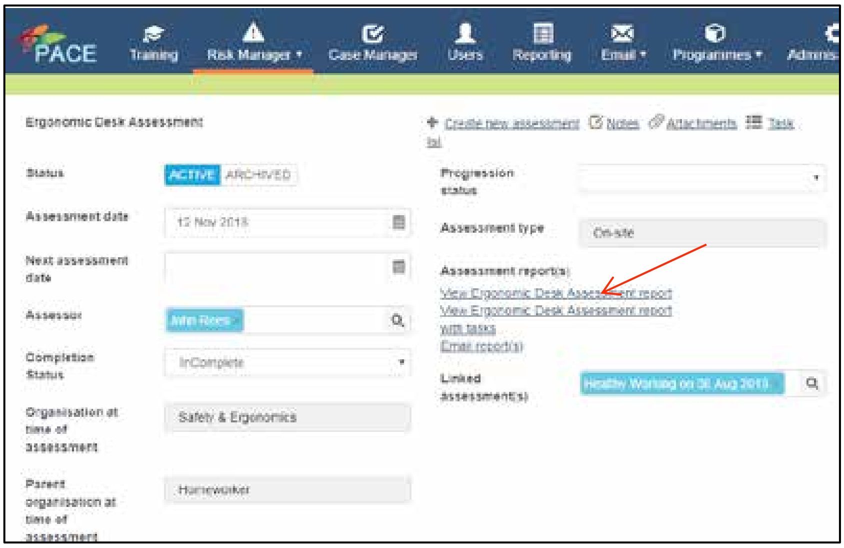


Issues and recommendations – These are conclusions and follow up actions emanating from the Assessment.

The issues identified are summarised and then actions specified. Tasks can be used to specify more detail



Reports can be run from the Assessment details section.

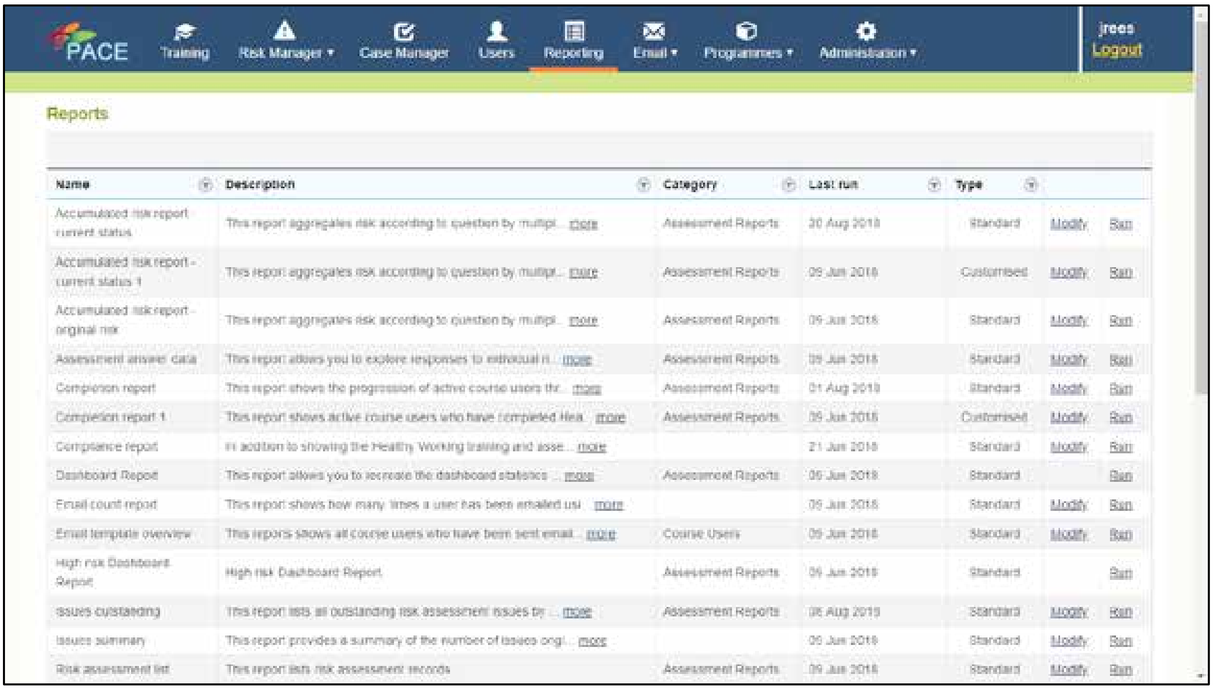


The EDA once completed will remain on the system and can be updated when necessary.

5.0 Reporting Menu

5.1 Running standard reports

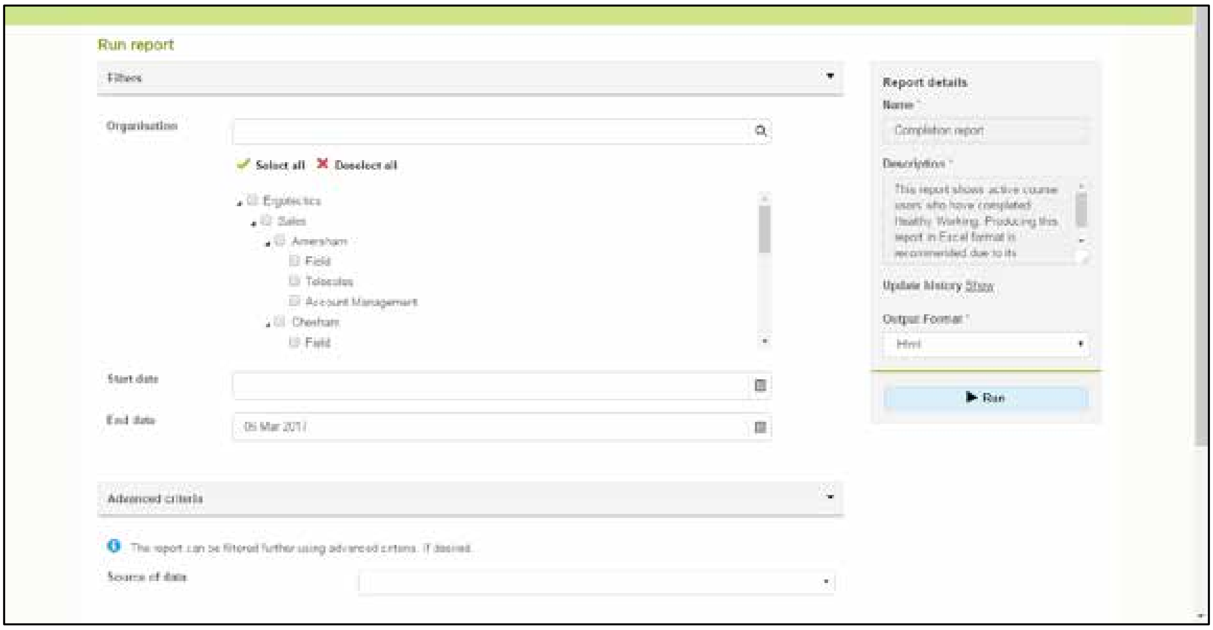
Click **Reporting** in the PACE toolbar to access the standard set of reports with which PACE comes pre-loaded. All reports have plain-language names and descriptions which make their purpose clear.



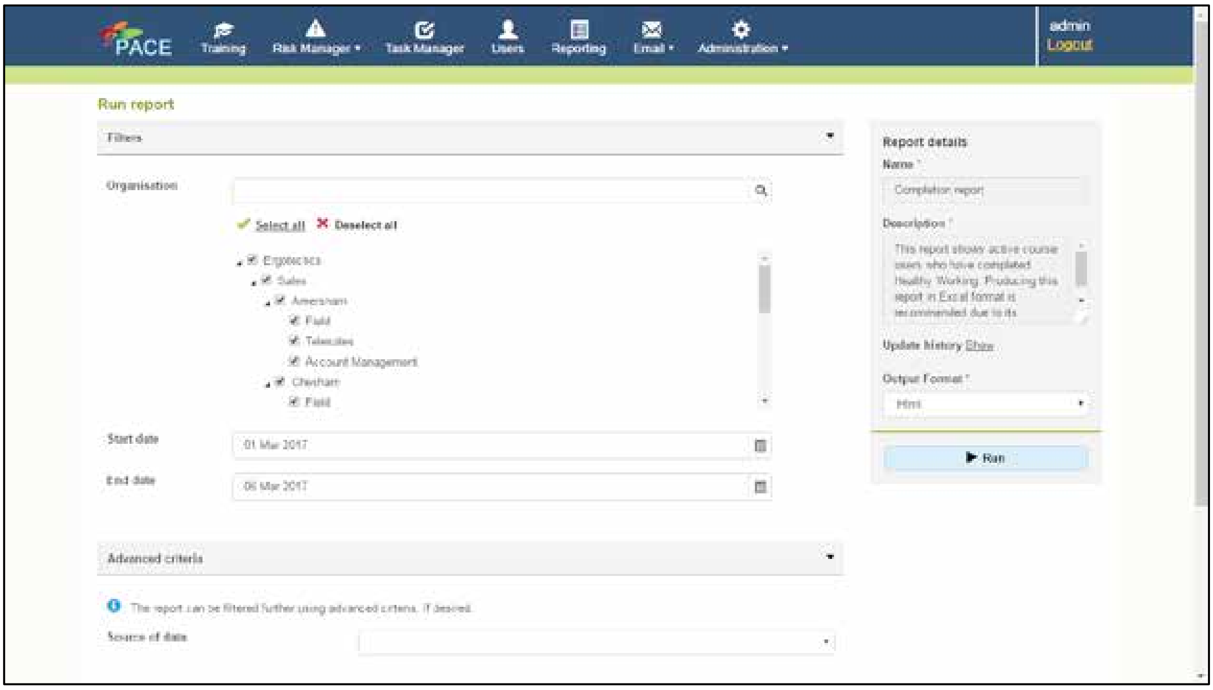
Click **Run** to run the reports for all users to which you have access.

For example if you want to run a report that shows everyone who is active on the system and what their current status is you would choose the **Completion report**

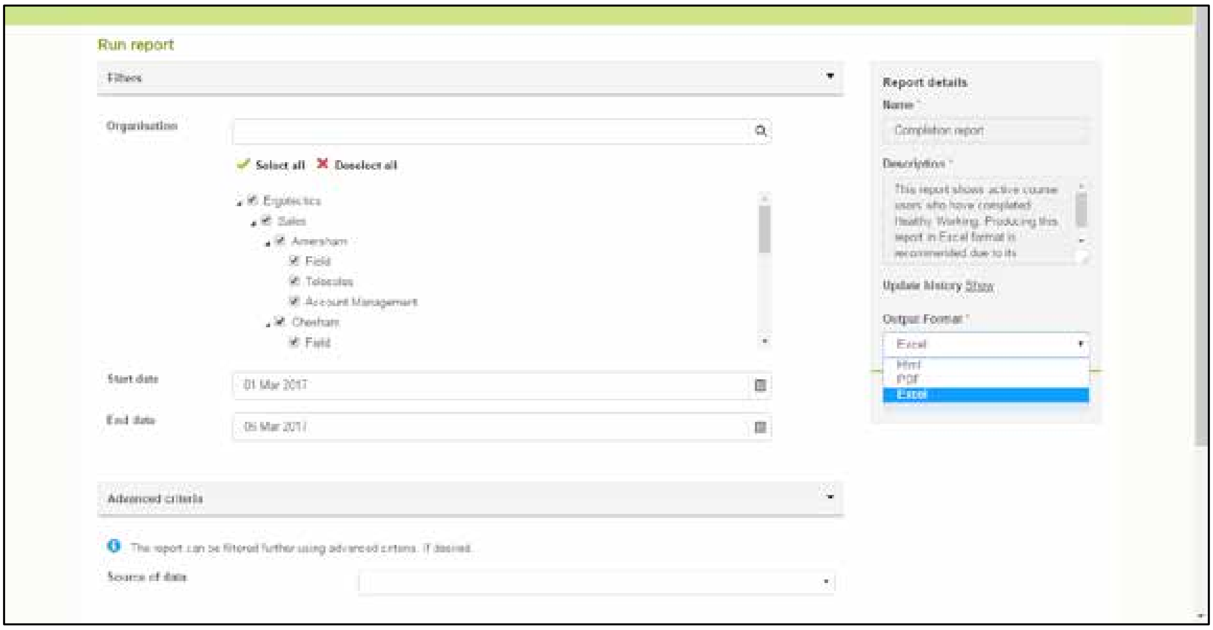
Clicking on Run will give the following screen.



Details of the organisation and date range can be completed.



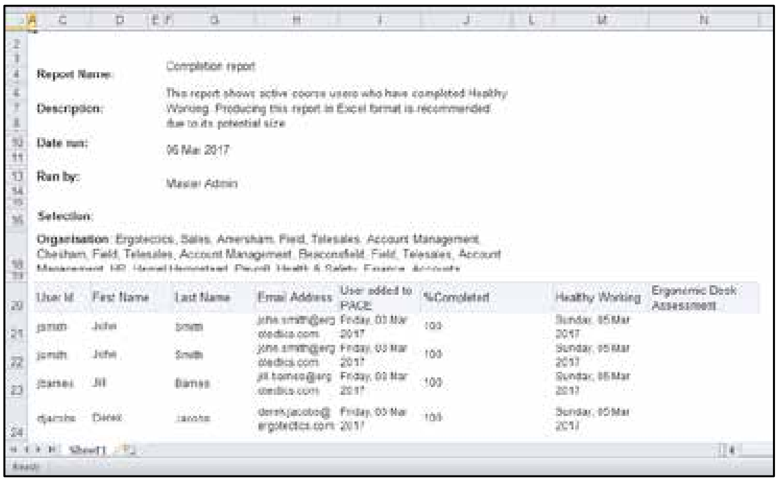
The output can be selected to run as a html file, a pdf file or an Excel spreadsheet.



In this case a date filter has been applied and it shows anyone who has completed within this date range for Ergotectics and all its departments.

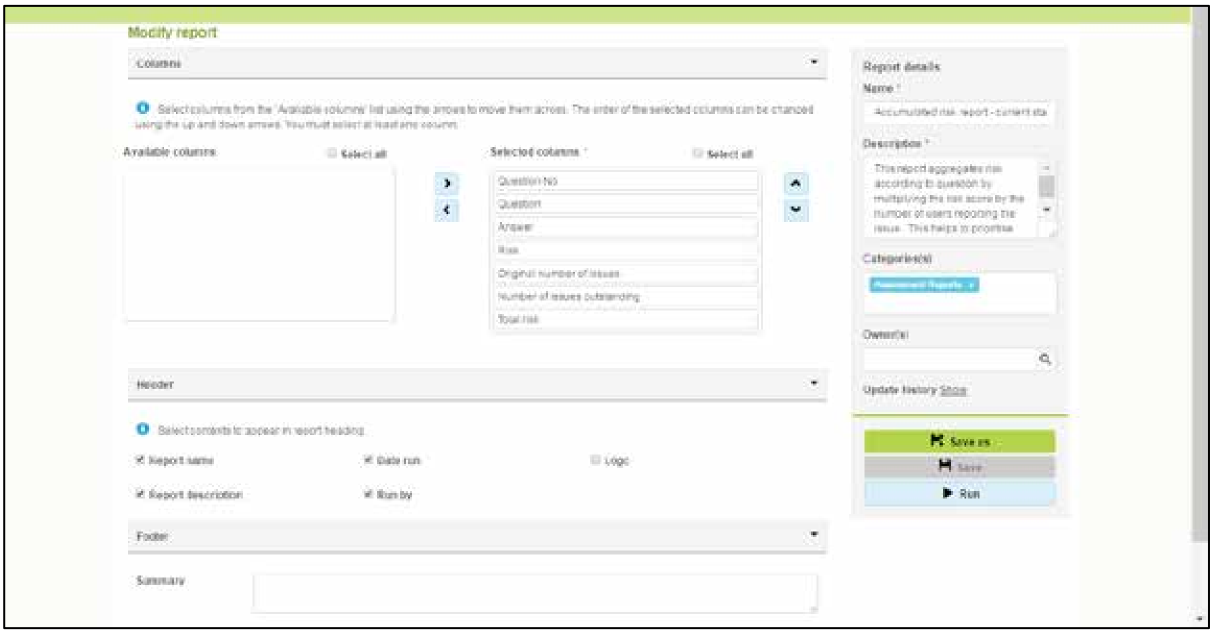
Advanced criteria can also be created to filter further if required.

Clicking on Run will generate the report in Excel format.



5.2 Modification of reports

Alternatively to running a standard report it possible to create customised reports, click **Modify** to take more control over the report you are running. **Columns** allow you to add or remove columns of data to your report. Select a column (or columns) and use the **<** and **>** icons to switch columns between the **Available Columns** and **Selected Columns** list.



You can change the order in which the **Selected Columns** appear on your report (the highest column in the list appears on the left of the report, with the one beneath appearing to its right and so on from there). You can also remove fields from your report. **Report name and header** allows you to make changes to the title and information displayed at the top of your report. Check the boxes next to the information you wish to include.

Report footer allows you to add some textual context to the report in terms of **Comments** that will be displayed at the bottom.

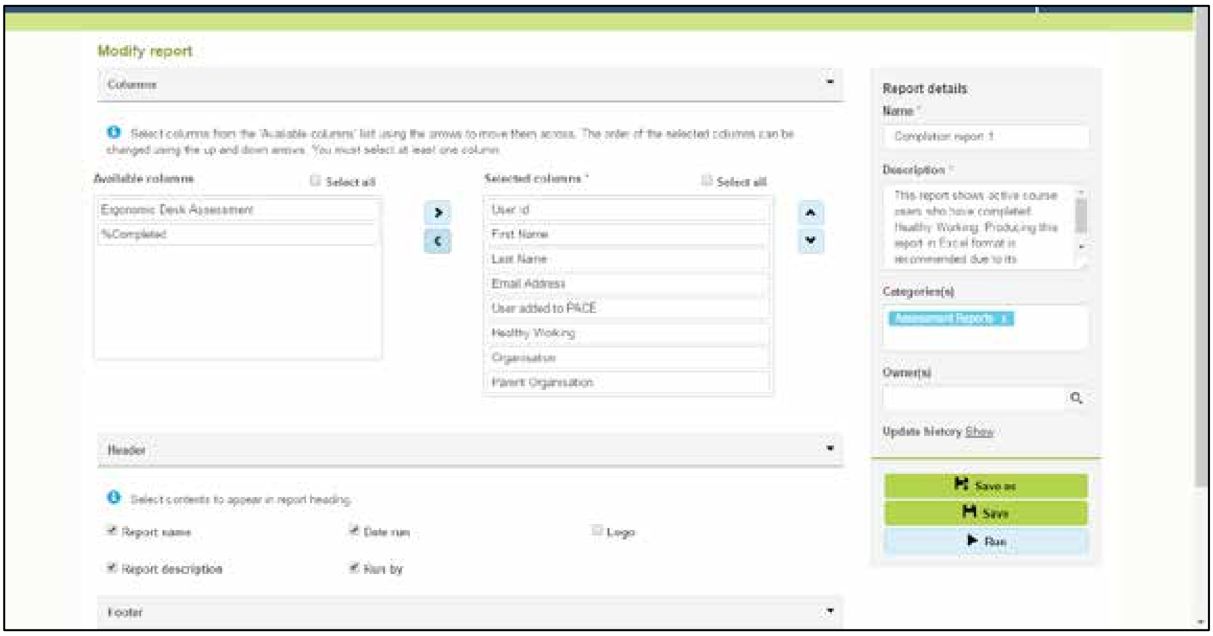
Click **Run** to run your report with the above settings.

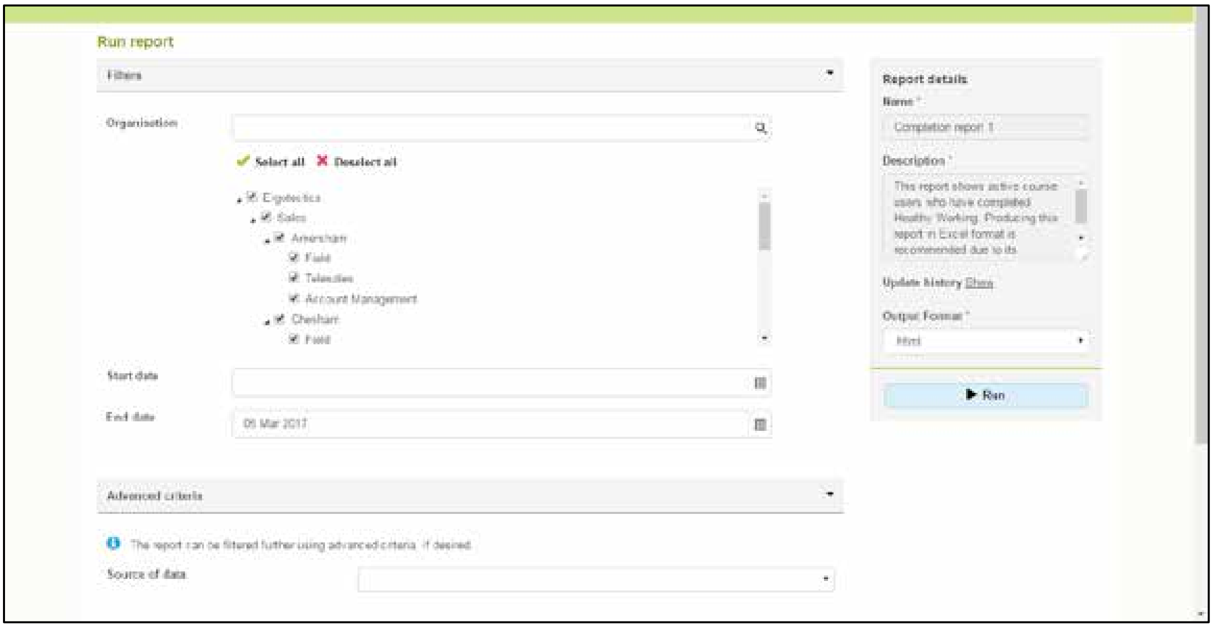
Report Details gives you access to supporting information and settings for the report:
Name – The default title of the report, and how it is identified in PACE
Description – Used to provide further information about the purpose of the report.
Categorie(s) – Categorie(s) are used to group reports with others that produce related output. It is possible for a report to be classified as more than one category.
Owners – As elsewhere in PACE, report Owners are the Administrators in PACE who are able to modify the report.

You can **Show** or **Hide** the **Update history** to see when and by whom the report was created and last modified.

Save as creates a new report. **Save** updates the existing report. (**N.B. If you save a modification to the existing report and don't save it as a new name this will alter the standard report.)**

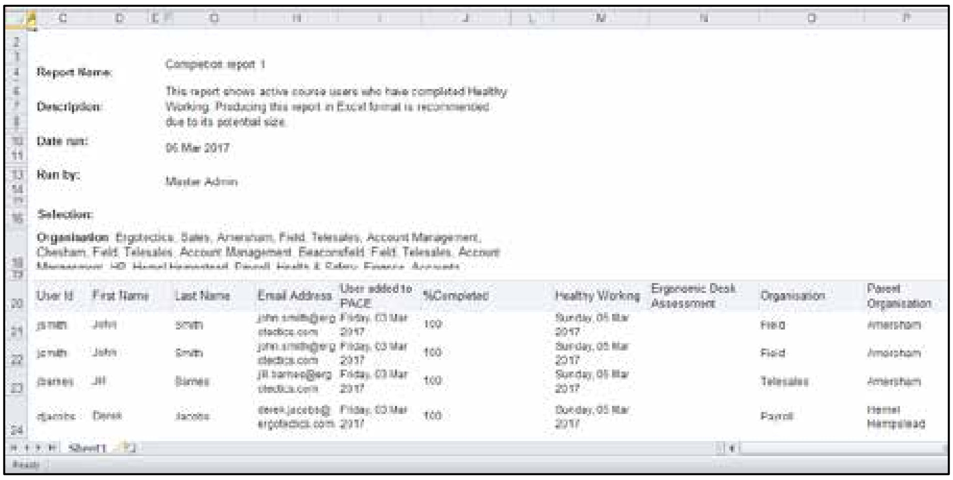
In the example below a new report has been created by moving columns from the standard report and saving it as a new report.





Once saved with a different name the report can then be run in the same way.

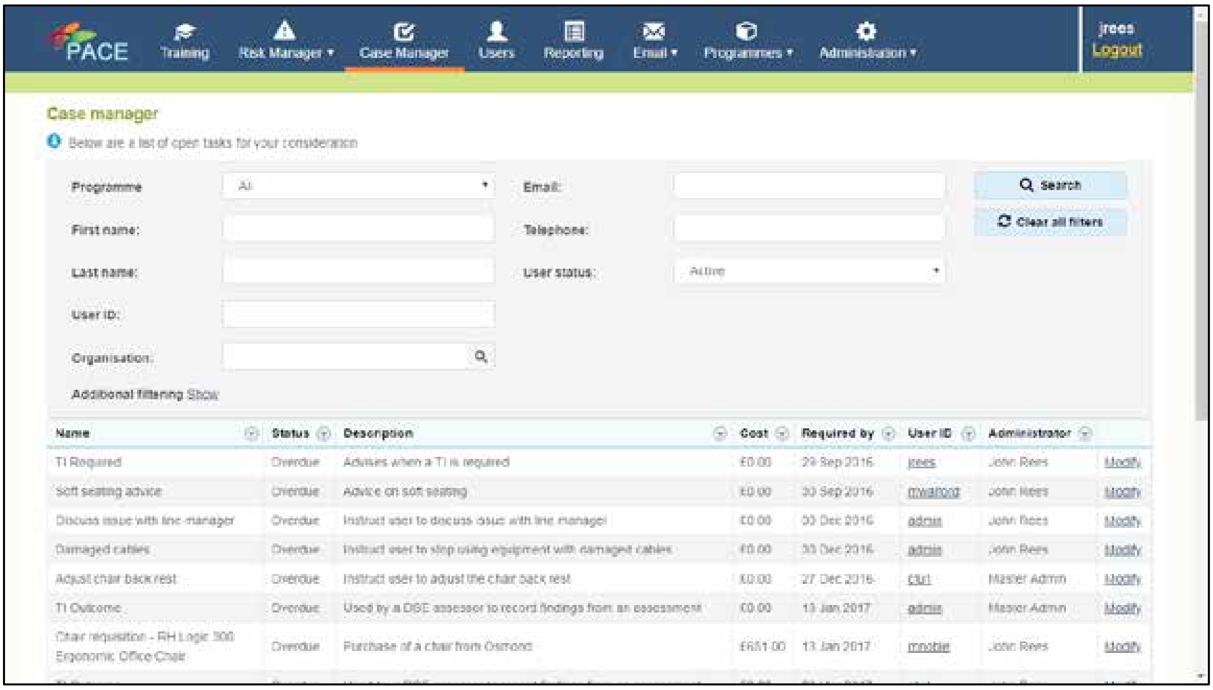
There is also a **Preview** button which allows you to preview the data before actually running the report.



Once the report has been run the fields that were selected to modify the report are shown.

6.0 Case Manager Menu

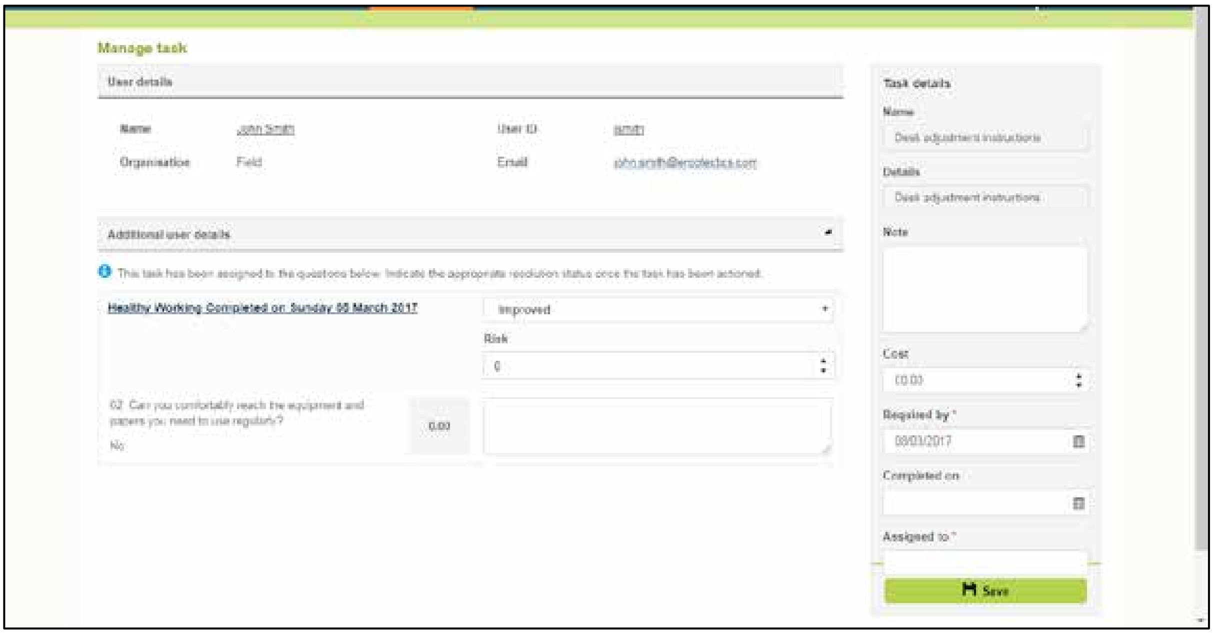
The Case Manager in PACE is a menu that allows you to view any outstanding tasks that you have as an administrator related to the risk assessments you have been viewing. To access the Case Manager click on the menu on the Home screen of PACE. This will bring up a list of tasks that you own and have not completed.

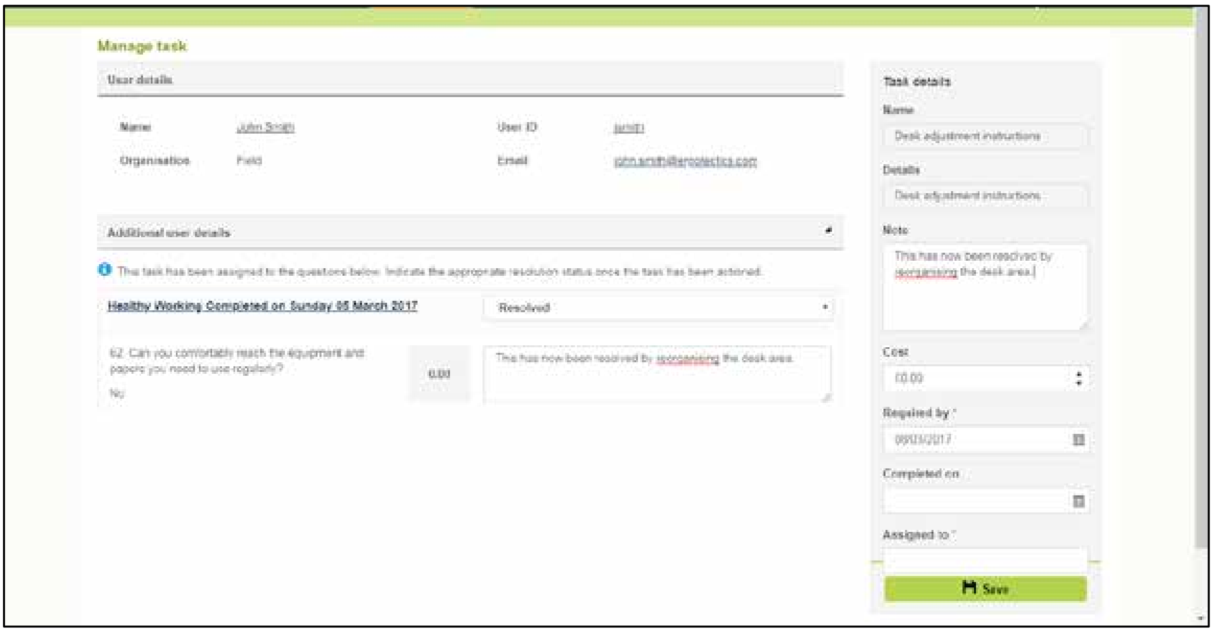


By selecting **Modify** against the task that you wish to deal with it will take you to a screen called **Manage task**.

On this screen you can write notes and set the status of the task.

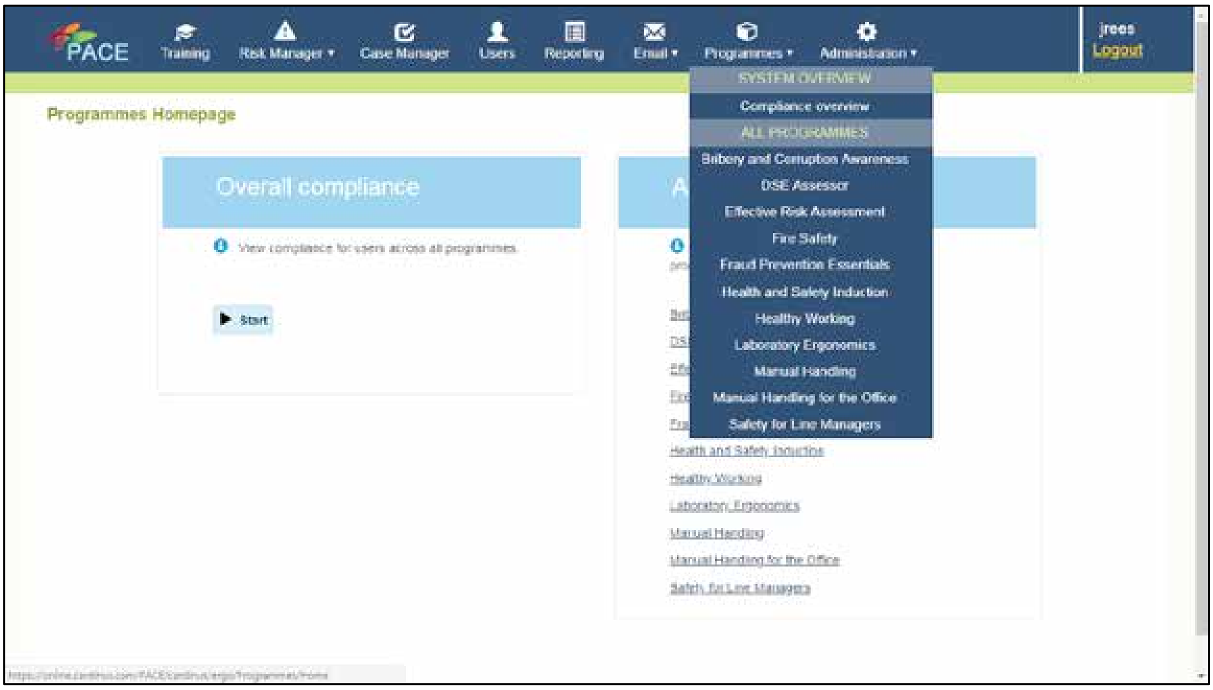
If you wish to reduce the risk for this task you can select the status **Resolved** and click on **Save**. This will remove the task from the list of outstanding tasks.


Manage task
User details
Name
John Smith
User ID
jsmith
Organisation
Field
Email
john.smith@ergolectics.com
Additional user details
This task has been assigned to the questions below. Indicate the appropriate resolution status once the task has been actioned.
Healthy Working Completed on Sunday 05 March 2017
Improved
Risk
0
62. Can you comfortably reach the equipment and papers you need to use regularly?
No
0.00
Task details
Name
Desk adjustment instructions
Details
Desk adjustment instructions
Note
Cost
£0.00
Required by *
08/03/2017
Completed on
Assigned to *
Save

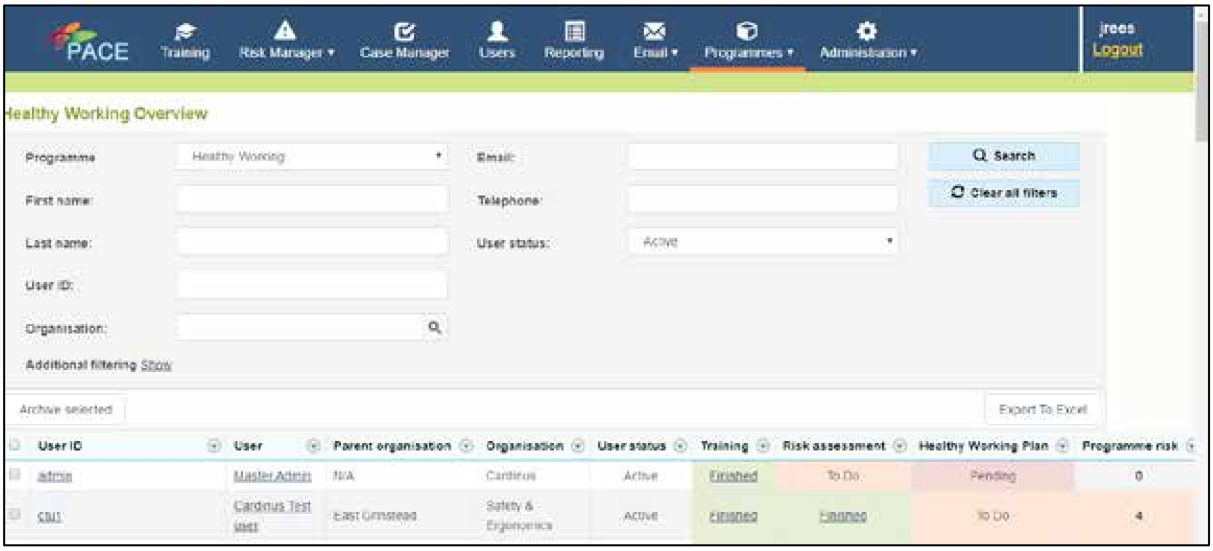

Manage task
User details
Name
John Smith
User ID
jsmith
Organisation
Field
Email
john.smith@ergolectics.com
Additional user details
This task has been assigned to the questions below. Indicate the appropriate resolution status once the task has been actioned.
Healthy Working Completed on Sunday 05 March 2017
Resolved
62. Can you comfortably reach the equipment and papers you need to use regularly?
No
0.00
This has now been resolved by reorganising the desk area.
Task details
Name
Desk adjustment instructions
Details
Desk adjustment instructions
Note
This has now been resolved by reorganising the desk area.
Cost
£0.00
Required by *
08/03/2017
Completed on
Assigned to *
Save

7.0 Programmes Menu

The programmes menu shows all the programmes that are in the course hub and the compliance can be seen for each one or a summary.



Clicking on Healthy Working shows the compliance for all users on the system for this programme.



Clicking on Compliance overview will show all the programmes for each person and the compliance for each. Compliance for Healthy Working will only be achieved when all actions in the Healthy Working Plan have been completed.