
1 Users

- Using Our Users on the right hand menu you can add users to your organisation
- Select Create New User and then fill in the member details
- Under User Type you have the option of either selecting User (View only) or Senior User. A Senior User can add more users to the system and can also customise the whole of the RIAMS system
- If your user is a temporary employee then you can set an expiry date for the user
- Click Save. The new user will now receive an email with their log in details

Removing Users

- Go to Our Users and click Delete next to a user's name (**Note:** If you are subscribed to CPD you can also see a user's CPD report)

2 Procedures

- Here you have options available only to a senior user. These are:
 - Edit
 - Grey out
 - Hide
 - Manage Collections

Edit:

- Click on edit to display the fields within a procedure that you can personalise for your organisation. These are
 - Responsibility of
 - Local Procedures
- Click into the Local Procedures field
- Here you will see suggested text from our authors. (you can either add to this text or create your own)
- The editing functionality is similar to Microsoft Word, you can also hyperlink to other websites and other areas of RIAMS
- Hyperlinking to a website:
 - Type a passage of text and then highlight that section
 - Click on the link icon (insert/edit link)
 - Type in the link URL (e.g. <http://www.google.com>)
 - Set the target (you can ignore add title)
 - Click save
- Hyperlinking to other parts of RIAMS
 - Click on the folder/link icon (insert/edit link to a module)
 - Then select the Knowledge Area you want to link to

- Then select the subfolders until you reach the area you want to link to and click insert
- After you have finished editing the field click Save at the bottom (**Note:** This will not save the procedure)
- On the next page click Save Edits to put the changes live
- You can also Notify Users that changes have been made to the procedure by ticking the box

Grey Out:

- You can grey out a procedure by clicking Grey Out
- You can give a reason for greying out which will be displayed in the document details
- This is used when an organisation only wants their users to view a procedure for reference only

Hide:

- You can hide a document from a View Only User by clicking Hide
- All Senior Users and Primary Contacts will be able to still view the hidden document
- The document will display Hidden in orange text below the document

3 Collections

RIAMS allows you to create a collection for all users in the organisation to view. This is used as a way of creating tasks for users or to collect documents and procedures together for group projects.

Create Collections

- Go to 'Our Collections' on the right hand menu
- Select 'Create New Collection'
- Name your collection and click 'Save' (Note: Remember this is not personal favourites collection)

Manage Collections

- Go to any document, procedure or guidance on RIAMS and click the drop down arrow
- Click on Manage Collections
- Select the Collection you wish to add the document to and click Save
- You can add a mixture of any documents or procedures from anywhere in RIAMS to your organisation's Collection

4 Folders

On RIAMS you can create folder structures within the existing RIAMS Knowledge Areas to suit your organisation. This has been used in the past by organisations to store their own procedures and documents as well as being used to store their QMS structure on the cloud.

Creating a folder

- Go to any Knowledge Area on RIAMS where you would like to create a folder and click on Add sub-category
- You are then able to create sub folders within the folder you have just created
- A document counter will display how many documents are stored within each folder

Deleting a folder

- If you would like to remove a folder that you have created you can click Delete next to the folder name
- This will then send the folder and all its contents to Archives (See Archives section below for more details)

5 Uploading Documents

You can upload documents to any are of RIAMS in the following formats up to 25mb - Word, Excel, PDF, PPT, JPG, PNG, TIF, RTF, TXT, WMV, SWF/FLV, MPEG and MOV files.

You can also insert links to other websites and online PDFs by clicking Add Link.

Adding Forms

- Click on Add Form(s)
- You can either drag and drop multiple documents into this section or click Browse to choose documents from your computer
- RIAMS will let you know that your documents are being uploaded
- In the Publisher field you can Add Another Organisation
- You can then notify users that this is a new document by ticking the box
- You can also share this document with the rest of RIAMS by ticking the Shared Best Practice box
- To share documents with other organisations then choose them from the list
- To quickly copy all the details from the first document to all those below click on “Apply information from the first form to all forms.”
- Set a review date if you want your Senior Users to be emailed when the document is ready for review in the future
- The bin icon will remove any documents you want to cancel

Click Upload to add the documents to RIAMS (**Note:** if it is a large document then it may take several minutes to complete the upload)

Creating a link

- Click on Add Link
- Fill in the Title, Description etc. details
- In the Publisher field you can Add Another Organisation
- To create a link to a website insert the website’s url into the box below
- You can then notify users that this is a new document by ticking the box
- You can also share this document with the rest of RIAMS by ticking the Shared Best Practice box
- Click Upload to add the document to RIAMS (**Note:** if it is a large document then it may take several minutes to complete the upload)

Editing the document

- Click the drop down arrow next to your new document

- You have the same options available to you as in procedures but you can also Move/Copy your own documents
- Click Move/Copy and move your test document to a new area of RIAMS

6 Archives

Nothing on RIAMS is ever deleted and every change we make to our procedures is archived. Only Senior Users can view the archives on RIAMS.

Archiving a document

- As a Senior User you can archive a document that your organisation has uploaded by clicking the drop down arrow next to the document and clicking edit
- In the edit screen you can then click on Archive this document and then select Yes

Restoring a document

- Click on View Archives on the right hand menu (**Note:** The text in red at the top right of the screen is letting you know that you are viewing RIAMS in archive mode)
- Go to the document you want to restore and click the drop down arrow
- Click edit, on the edit page click Restore Document

Restoring a folder

- Click on View Archives on the right hand menu (**Note:** The text in red at the top right of the screen is letting you know that you are viewing RIAMS in archive mode)
- Click on restore next to the folder name to restore the folder to RIAMS and restore all the documents that had been uploaded within it

7 What's New?

- To update all users on your organisation's account you can create a What's New? article.
- Go to What's New? on the home page and click "More Updates"
- Click Create New Update and type your title and message. You can also choose which topic you want your message to be tagged as.