



HISTORION[®]

Radiation Safety Software



Quick-Start Guide

Historion Genre 6.x

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In addition, the software includes features and functions which can assist users to comply with particular requirements relating to the management of radiation exposure. These requirements may (for example) be mandatory obligations imposed by state or federal legislation or statutory instruments, or may be non-binding recommendations issued by bodies such as ARPANSA or Standards Australia.

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The Historion Quick-Start Guide

The Historion Quick-Start Guide was authored on the request of Historion clients to provide a fast and easy reference alternative to the detailed and extensive Historion Manual.

The Historion Quick-Start Guide is intended to be brief and is a suitable shortcut booklet for the most common tasks in the Historion software expressed in each case as a sequence of easy to follow steps.

For more detailed information for each process covered please consult our most comprehensive guide; the [Historion Manual](#) or contact [Historion Support](#).

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1 Add a Wearer

To add a new Wearer;

There are three ways to add Wearers in Historion;

1. Import Wearer details automatically with Dose Readings contained in Dose Reports
2. Add a Wearer manually from the Wearers Search page
3. Bulk import Wearer details with the Wearer Data Import Tool

1. Import Wearer details automatically with Dose Readings contained in Dose Reports

Historion is designed to save the RSO time by eliminating as much manual data entry as possible. This includes auto-adding new Wearers not yet in Historion when detected in new Dose Readings. See the sections [Import new Dose Readings](#) and [Transfer new Dose Readings](#) for adding new Dose Readings (these processes automatically add new Wearers found) to Historion.

2. Add a Wearer manually from the Wearer Search page

Step 1. Select the Wearers ribbon tab.

Step 2. Click the Search (binoculars) icon.

Step 3. Click the [Add](#) icon at the lower right corner of the Wearer Search page.

Step 4. Complete as many data fields as possible in the new Wearer Details page then select [Save](#).

3. Bulk Import Wearer details with the Wearer Data Import Tool

Step 1. Select the Wearers ribbon tab.

Step 2. Select Import (folder) icon.

Step 3. Click the [Check Required Import File Format](#) link.

Step 4. Save the Wearer Data Import Template Excel spreadsheet provided in a reliable location.

Step 5. Complete and save the Wearer Details in the Excel spreadsheet.

[Blue columns are required. Columns A and D: use one or the other. Yellow columns must have dates.](#)

Step 6. Select the Wearers ribbon tab.

Step 7. Select Import (folder) icon.

Step 8. Click the [Select File & Import Data](#) link.

Step 9. Browse to select the external Excel file saved in the above steps and click the [Open](#) button.

[Import results including issues \(if there are any\) are displayed. For major data issues the data will not import. If a partial import would result due to erroneous data Historion indicates cells needing correction.](#)

2 Find a Wearer or Group of Wearers

To find a Wearer;

Wearers can be found in two modes;

1. Find a Wearer or;
2. Find a Group of Wearers;

1. Find a Wearer

Step 1. Select the Wearer Ribbon tab.

Step 2. Select the Search (binoculars) icon.

Step 3. Type the Surname or First Name (or 1st few characters of each) of Wearer and press <Enter>.

Historion will show all Wearers matching the criteria typed into the Wearer search box. If searching by Surname does not find the required Wearer try the First Name or expected Data Name.

Step 4. Click the [View](#) hyperlink to display the selected Wearer's details.

2. Find a Group of Wearers

Step 1. Select the Wearer ribbon tab.

Step 2. Select the Search (binoculars) icon.

Step 3. Select the Group criteria or demographic of interest (e.g. an Age Group, Sex or Occupation)

Step 4. Select the [Search](#) button at the lower right of the search criteria fields.

Step 5. [Export](#) displayed Search Results to Excel (Export button lower left corner of search page) if required or further refine search criteria as needed and search again.

3 Add a File Note

To add a File Note;

Step 1. Find the Wearer and open the Wear Details page as described above under [Find a Wearer](#).

Step 2. Click the File Notes tab at the left side of the Wearer Details page.

Step 3. Click the [Add](#) (File Note) icon at the lower right corner of the Wearer Details page.

Step 4. Select required File Note Type, Priority and Status choices. (All dropdowns are required)

Step 5. Record a File Note Summary (File Note Summary is required)

Step 6. Record File Note details or other references as required.

Step 7. Click the [Save](#) icon at the lower right corner of the File Note Details details page.

[Add attachments \(external documents\) to the File Note if required optional;](#)

Step 8. Click the Attachments File Note tab.

Step 9. Click the [Add](#) (paperclip) attachment icon.

Step 10. Browse to select the external file required (for example .pdf or .doc file) and select Open.

Step 11. Select the Document Type and any notes for the document then click the [Save](#) icon.

Step 12. Complete any metadata fields required at the lower left corner of the Document Details page by selecting the small [Add](#) icon and then selecting a metadata type and recording a value followed by [OK](#) to save the new metadata item for the file or [Cancel](#) to discard the new metadata item.

All documents or attachments that have been imported into the Historion database can be accessed from the Documents (paperclip) attachment icon in the Wearers ribbon panel.

4 Add a Badge Note

To add a Badge Note;

Step 1. Select the Monitor dropdown feature from the Dosimeters panel in the Dosimetry Ribbon tab.

Step 2. Select the *New Badge Note* feature from the Monitors dropdown feature.

Step 3. *Accurately* record the Badge Identifier, Serial Number or Monitor number (the name of the identifier field will differ according to your dosimetry provider) in the Badge ID field.

Step 4. Re-check the Badge ID value is correct, this single value will identify any future readings that are yet to be imported for the dosimeter.

Step 5. Select a Wearer. If the Wearer is unknown or has not be added to Historion yet, then select the CONTROL Wearer. The correct Wearer can be selected later.

Step 6. Record a Summary of the Badge Note briefly indicating why the dosimeter and Dose Readings yet to be reported by the provider are of interest and to be followed up and any further Detail if required, then select the [Save](#) link at the lower right corner of the Badge Note Details page.

Step 7. At a future stage, when results are returned from the applicable provider responsible for Dose Reading data for this dosimeter, import the Dose Report.

On import of the Dose Report Historion should connect the Badge Note to the matching Dose Reading (via the Badge ID) and will prompt after importing that a Badge Note alignment has been detected.

The Dose Reading can now be reviewed in the context of the Badge Note and the original concern.

5 Add a Pregnancy Record

To add a Pregnancy Record;

Step 1. Find a Female Wearer and open their details as described above under [Find a Wearer](#).

Step 2. If the Wearer does not already have their Sex selected as Female the Pregnancy Notifications icon will not be displayed. If this is the case select the [Edit](#) icon at the lower right corner of the Wearer Details page and select Female from the Sex dropdown then click the [Save](#) icon. The Pregnancy Notifications icon and link will now appear at the centre bottom right corner of the Wearer Details page;



Step 3. Click the [Pregnancy](#) icon (shown above).

Step 4. Click the [Add](#) icon at the lower right corner of the pregnancy notifications list displayed.

Step 5. Provide an approximate timeframe for commencement of maternity leave if available.

Step 6. **Record monitoring Start Alerts and Stop Alerts dates. This is important.** This sets the window during which Dose Readings for the pregnant female are to be checked by the RSO and during which time Historion will bring the records to the RSO's attention when readings are imported that include readings for the pregnant wearer. Set this date to a time well before and after the pregnancy timeframe.

Step 7. Record any File Notes relevant as a record of emails or conversations (including pregnancy and foetal dose monitoring care and processes discussed and advised) as described under [Add a File Note](#).

6 Create an Exit Letter

To Create an Exit Letter;

Step 1. Find a Wearer and open their details as described above under [Find a Wearer](#).

Step 2. Click the [Letter](#) icon, the last icon at the lower left corner of the Wearer Details page.

Step 3. Select the required Template from the dropdown displayed, for example Exit Letter Template

Step 4. Click the Letter (writing pencil) icon to the right beneath the Template Description.

Historion will populate the selected Letter Template with previously nominated data as setup by your Historion Administrator or as established in the default Historion database setup.

Note; depending on open pages and timing of different user activity and mouse clicks, after instructing Historion to generate the letter with the above steps, Microsoft Word may appear opened in minimised mode or in the background behind current pages.

7 Import new Dose Readings

To Import new Dose Readings;

Step 1. Prepare source dose report files for import in a logical folder structure in a safe location such a network share that is backed up and meets whichever privacy security requirements are required.

Step 2. Confirm Dose Report type complies with Historion recognized dosimetry data types. By default Historion recognizes the following pre-defined Dose Report types and these are available for import;

Provider/Dose Report Type	File Format
ANSTO AEDD Dose Readings by Building	Direct Transfer
ANSTO Committed Effective Dose (CED) Readings	Direct Transfer
ARPANSA Periodic Dose Reports (TLD, pre-OSL technology)	CSV
ARPANSA Periodic Dose Reports (OSL, pre-TLD technology)	CSV
ARPANSA Annual Cumulative Dose Reports	CSV
Legacy ARS (Australian Radiation Safety Services) Dose Reports	CSV
Landauer CSV	CSV
Mirion CSV (now legacy)	CSV
Mirion Excel	Excel
Instadose I and II	Excel
RDC (distributed in Australia by GMS)	XML

Please note that additional Dose Report formats can be added, including generic templates for legacy body and extremity doses (suitable for data migration purposes).

Step 3. Decide whether to import either a single Dose Report or multiple Dose Reports (Bulk). If importing for the first time a single file import is suggested but not essential. If importing multiple Dose Reports (Bulk) a folder or folder structure containing Dose Reports will need to be selected. Historion will attempt to import all Dose Reports it finds in all sub folders beneath the selected top-level folder.

Importing a single Dose Report

Step 4. If importing a single file: click the [Import](#) icon from the Dosimetry ribbon tab and select [Single Dose Report \(file\)](#) from the dropdown menu.

Step 5. Browse to select the required Dose Report file from the file system then click OK.

Step 6. Record the names of any unknown Centres (this will only be needed once per Centre)

Importing Multiple Dose Reports (Bulk Import)

Step 4. If importing multiple files: click the [Import](#) icon from the Dosimetry ribbon tab and select [Dose Reports \(Bulk/Folder\)](#) from the dropdown menu.

Step 5. Browse to select the required Dose Report folder from the file system then click OK.

Step 6. Record the names of any unknown Centres (this will only be needed once per Centre) and OK repeating the processes for each if multiple Centres are new.

Check (and save) the import log created at the end of the bulk import process. Confirm all expected Dose Reports imported. Note any files not yet imported and check logs for data compatibility indications.

8 Transfer new Dose Readings

To Transfer new Dose Readings;

Step 1. Open the Dosimetry ribbon tab

Step 2. Click the Transfer icon to display the Landauer data transfer page

Step 3. Ensure that the two dates displayed at the top of the page match and both precede the date of commencement of your organisation's use of Landauer dosimetry badges.

In Australia this will be a date from 2006 onward. If this is the first Landauer transfer to be conducted or not yet setup contact Historion support for further details at <https://www.historion.com.au/contact-us>

Step 4 Click the [\[Download\]](#) button at the top right corner of the Transfer page. The data transfer service will start to respond, (it will take a minute to commence Dose Report downloading).

Step 5. Once the download has completed and if new Dose Reports are listed/ready click the [\[Import\]](#) button at the lower right corner of the Landauer data transfer page to complete the process.

Step 6. Click the [Imported](#) icon in the Dosimetry ribbon tab to show newly imported Dose Reports.

9 Extract a Dose Report Original File

To extract an *original* Dose Report File:

Step 1. Open the list of Dose Reports already imported (there must be at least one) by selecting the Dosimetry Ribbon tab, then select the Imported feature icon in the Exposure Data panel.

Step 2. Open the Dose Report required by selecting the [View](#) link for the Dose Report in the list.

Step 3. Select the [Original](#) button at the lower left corner of the Dose Report Details page.

Step 4. Navigate to a folder location required to save the original Dose Report file to and select Save.

Note 1: the original file will have its imported file name appearing as the default name in the Save As dialogue, except for Landauer Dose Reports transferred from the Landauer Data Transfer service.

Landauer Dose Reports have a derived name include the Date Range covered by the Dose Report and main Centre (Landauer Account) involved.

10 Add a Custom Notification

To add a Custom Notification;

Step 1. Ensure SMTP email is setup under Admin/Settings/SMTP Email. Use the Test Email icon to confirm email is setup correctly. Custom Notifications use SMTP email and are pointless without it.

Step 2. Select the Custom feature in the Notifications panel of the Dosimetry Ribbon tab. The list of existing Custom Notifications is shown. The list may be empty if none have been added yet.

Step 3. Select the [Add](#) link at the lower right corner of the Custom Notifications listing page.

Step 4. Complete all required information in the Custom Notification Details page displayed for the new Custom Notification, including filters required on the left side, if any, and email details.

Note that the selection of the Dose Report Type is important and cannot be changed after saving.

Step 5. Add the required Custom Notification Data Rule (or multiple rules) to the Custom Notification.

Note the new Custom Notification must be saved before rules can be added. Further, multiple rules are treated as inclusive criteria. OR conditions are not supported in Custom Notifications yet. To achieve OR outcomes multiple Custom Notifications will need to be added.

Step 6. Test the new Custom Notification to ensure it is working; import (or re-import) a Dose Report with Dose Readings that have values matching the Data Rule(s) stipulated.

11 Add a Dose Alert

To add a Dose Alert;

Step 1. Select the Alerts feature in the Notifications panel of the Dosimetry Ribbon tab. The list of detected Dose Alerts is displayed. It will be empty if no Dose Alerts have been detected or if all Dose Alerts have been *cleared*.

Step 2. Select the [Settings](#) link at the lower centre right of the Dose Alerts listing page.

Step 3. The list of existing Dose Alert Settings is shown. The list is empty in a new Historion database or if Dose Alert Settings have not been added yet.

Step 4. Select the [Add](#) link at the lower right corner of the Dose Alerts listing page.

Step 5. Complete all required information in the Dose Alerts Setting Details page displayed for the new Dose Alert, including filters required on the left side, if any, and Alert definition and threshold criteria value on the lower right side of the page.

Step 6. Select the [Save](#) link at the lower right corner of the Dose Alert Setting Details page. There will be a reminder displayed to scan for hits against the new Dose Alert setting in the steps that follow.

Step 7. Select the [Back](#) link at the lower right corner of the Dose Alert Setting Details page. The list of Dose Alerts Detected will be shown. The new Dose Alert Setting has not been used yet.

Step 8. Scan for Dose Alerts against the new Dose Alert Setting created above, by selecting the Dose Alert Setting in the dropdown list at the lower centre of the Dose Alerts Detected page then;

Step 9. Select the [Scan](#) link at the lower right centre of the page. Historion will search and create new Dose Alerts in the list where conditions matching the criteria used in the Dose Alert setting.

Step 10. Click the Alert record selection link on the left side of the list of Dose Alerts detected (if there are Dose Alert results showing) and complete classification and analysis steps for each Alert.

Step 11. When any Dose Alerts are at a stage (this may take some time) where the RSO and the organisation have completed reviewing/assessing/documenting the alert, the alert can be *Cleared* to move it to the cleared alerts list. This can be done by clicking the Clear link within the Dose Alert or the Dose Alerts listing page, after selecting the record in question.

12 Merge Two Wearer Records

To merge two Wearer Records;

Step 1. Select the Merge/Split feature from the Wearers Ribbon tab. The full list of Wearers in the Historion database is displayed. This page may take a moment to display in large implementations.

Step 2. Select two (and only two) Wearers that are to be merged, from the list, by ticking the selection tick box to left of the Wearer Name. The [Merge Wearers] button should now be active.

Step 3. Select the [Merge Wearers] button. Historion will try to find any consistencies between the two Wearers selected for merging and will prompt for confirmation if no consistencies can be found.

Step 4. Select the required data in each displayed Wearer Data field of the merge page displayed.

Note that the up and down arrows (these are known as *spinner controls*) in each field can be used to move between the different values between the two Wearers that are being merged. The new merged Wearer to be created will use the selected spinner control values in the various fields displayed.

Step 5. De-select the Primary Wearer Number that will *not* be used as the number for the new Wearer.

Step 6. Select the [Save](#) link at the lower right corner of the merge page.

Step 7. Historion will prompt for confirmation of removal of the original pre- merge Wearer records. In most cases it is best to select Yes to this prompt. If unsure, please consult Historion Support at the link provided here: <https://historion.com.au/contact-us>

Step 8. Historion will prompt to show the newly merged Wearer record. Select Yes if required.

13 Find and Account for Gaps in the Dose Record

To find and account for Gaps in the Dose Record;

Step 1. **Import all Dose Reports available** before starting this process, either using the [Import, Bulk Import](#) or [Transfer](#) (for Landauer Dose Reports) processes described above.

Step 2. Select the Dosimetry ribbon tab.

Step 3. Click the Gaps icon.

Step 4. Select a Gap detection level at the lower left corner of the Gaps page then click [Re-scan](#).

Centre (the default) is recommended as the first Gap level to scan. Resolving Centre level gaps in the Dosimetry Record will automatically resolve many Wearer Gaps at the next level down and save work.

Step 5. For detected Gap records click the [View](#) link and display the Gap details page.

Step 6. Click the Edit icon, record gap reasons and action items applicable then click the [Save](#) icon.

Some Gap reasons are set to Allowed Gaps and some are set to Not Allowed Gaps. The Historion Administrator can add new Gap Reasons and Actions.

File Notes can be recorded against Gap records, allowing further explanation and accounting for Gaps present in the Dose records. Try to resolve all Centre Gaps before scanning for Wearer Gaps.

14 Find Duplicated or Overlapping Dose Readings

To find Duplicated or Overlapping Dose Readings;

Step 1. Import all Dose Reports available before starting this process, either using the [Import, Bulk Import](#) or [Transfer](#) (for Landauer Dose Reports) processes described above.

Step 2. Account for all Gaps and follow up and import missing Dose Reports as described above under [Find and Account for Gaps in the Dose Record](#).

Step 3. Select the Dosimetry ribbon tab.

Step 4. Click the Duplicates icon for Duplicate Dose Readings or the Overlaps icon for Overlapping Dose Readings. Duplicate Dose Readings have the same wearing period and value (exposure) outcomes against an energy time for the same Wearer. Overlapping Readings are readings for the same Wearer that have overlapping date ranges.

Step 5. Click the Re-Scan icon and observe any new overlaps or duplicates recorded.

Step 6. Follow the set of Duplicates or Overlaps as required using [View Set](#) and [Dose Report](#) links.

Step 7. For Duplicate Readings select the [Is Allowed Duplicate \[✓ \]](#) tick box and for Resolved Overlaps select the [Is Resolved Overlap \[✓ \]](#) tick box when these items have been analysed and are understood.

Allowed Duplicates and Resolved Overlaps are hidden by default so the RSO doesn't have to manage these items further. Allow and Resolve decisions can be reversed in the "All" instances of their lists.

Take care if deleting Duplicate Dose Readings. **Deleting readings is usually not needed and undesirable** as the provider's official record will be changed in the locally recorded dosimetry data.

If there is a data problem it is better to err on the side of getting the whole Dose Report fixed and issued as a new version from the provider. Further, Overlaps cannot be resolved without a Dose Application. If the number of Dose Applications count for an overlapping Dose reading is zero then a Dose Application must be selected to classify the reading.

15 Add a Protective Device Model

To Add a Protective Device Model;

Step 1. Select the Protective Devices ribbon tab.

Step 2. Select the type of Protective Device (Historion uses the same suite of pages for all types)

Step 3. Select the “<Type> Models” Tab to the left of the page. Where <Type> is the type selected;



Step 4. Click the [Add](#) icon at the lower right corner of the Models List Page.

Step 5. Complete all available Model details for the given Protective Device model.

Step 6. Click the [Save](#) icon at the lower right corner of the Protective Device Model page.

Note: you must have at least one Protective Device Model recorded to be able to add any Protective Devices to the Protective Device register. New Models must be registered before they can be used.

16 Record a Protective Device Model Safety Assessment

To record a Protective Device Model Safety Assessment;

Step 1. Record the Protective Device Model if not already added, as described above.

Step 2. For an already Saved Protective Device Model select the Safety Assessment tab.

Step 3. Click the [Add](#) icon at the lower right corner of the Safety Assessment page.

Step 4. Complete as many fields in as many tabs as possible.

Step 5. Click the [Save](#) icon.

Note: the Protective Device Model Safety Assessment pages follow the layout and information requirements of Standard AS/NZS 4543.3:2000 Part 3 Protective Clothing and Devices. More information is available at:

<https://infostore.saiglobal.com/store/Details.aspx?ProductID=384934>

17 Import Protective Device Model Documentation

To import Protective Device Model Documentation;

Step 1. Record the Protective Device Model as described under [Add a Protective Device Model](#).

Step 2. For an already Saved Protective Device Model select the Documentation (this Model) tab.

Step 3. Click the [Add](#) (paperclip) attachment icon.

Step 4. Browse to select the external file required (for example .pdf or .doc file) and select Open.

Step 5. Select the Document Type and any notes for the document then click the [Save](#) icon.

Step 6. Complete any metadata fields required at the lower left corner of the Document Details page by selecting the small [Add](#) icon and then selecting a metadata type and recording a value followed by **OK** to save the new metadata item for the file or **Cancel** to discard the new metadata item.

All documents or attachments that have been imported into the Historion database can be accessed from the Documents (paperclip) attachment icon in the Wearers ribbon panel.

18 Register a new Protective Device

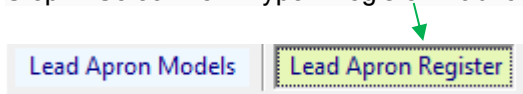
To register a new Protective Device;

Step 1. Select the Protective Devices ribbon tab.

Step 2. Make sure the required Protective Device Model is already recorded for the new Protective Device to be added. Protective Device Models are recorded in their own list as described above the section.

Step 3. Select the type of Protective Device to be added to the register. (Historion uses the same suite of pages for all types)

Step 4. Select the “<Type> Register” Tab to the left of the page. Where <Type> is the type selected;



Step 4. Click the [Add](#) icon at the lower right corner of the Protective Devices <Type> List Page.

Step 5. Complete all available device details to register the individual Protective Device. The Model of the Protective Device must be selected (mandatory).

Step 6. Click the [Save](#) icon at the lower right corner of the Protective Device details page.

Note that in some jurisdictions the Protective Device Local Unique ID is mandatory.

19 Record a Protective Device Test Record

To record a Protective Device Test Record;

Step 1. Record the device if not already entered as described under [Register a new Protective Device](#).

Step 2. For an already Saved Protective Device select the Test Records tab

Step 3. Click the [Add](#) icon at the lower right corner of the Test Records list page.

Step 4. Complete as many fields in as many tabs as possible.

Step 5. Click the [Save](#) icon.

20 Record a Protective Device Defect

To record a Protective Device Defect;

Step 1. Record the device if not entered as described under [Register a new Protective Device](#).

Step 2. For an already Saved Protective Device select the Defects tab.

Step 3. Click the [Add](#) icon at the lower right corner of the Defects list page.

Step 4. Complete as many fields in as many tabs as possible.

Step 5. Click the [Save](#) icon. This saves a reported Defect however this is not within the context of a Protective Device Test Record (such as a defect reported by a wearer or staff member) see below.

Alternatively after step 2

Step 3. Select an existing or add a new Protective Device Test record

Step 4. For a Saved Test Record, in the Test Record detail page select the Defects tab.

Step 5. Click the [Add](#) icon at the lower right corner of the Defects list page.

Step 6. Complete as many fields in as many tabs as possible including importing of pictures of the defect if available and action/follow up steps to come if these are determined.

Step 7. Click the [Save](#) icon. This saves the Defect in the context of the current Test Record

Note that the Defects tab in the Protective Device details page lists defects that were and defects that were not recorded in the context of a specific Protective Device Test Record.

21 Add Equipment

To add Equipment;

Step 1. Select the Regulated Devices ribbon tab.

Step 2. Select the type of Equipment from the first six icons displayed. (Historion uses the same suite of pages for all Equipment types).

Step 3. Click the [Add](#) icon at the lower right corner of the <Type> of Equipment list page.

Step 4. Complete as many fields in as many tabs as possible.

At least one of the Name/Alias, Brand/Range, Model or Serial Number fields are required. Record all if available.

Step 5. Click the [Save](#) icon.

22 Add an Equipment Service Record

To add an Equipment Service Record;

Step 1. Add a new Equipment record if not already entered as described above under [Add Equipment](#).

Step 2. For an already Saved Equipment record select the Maintenance tab.

Step 3. Select the Service Records tab.

Step 4. Click the [Add](#) icon at the lower right corner of the Service Records list page.

Step 5. Complete as many fields in as many tabs as possible.

Step 6. Click the [Save](#) icon.

Step 7. If a Service Report, receipt or other document/correspondence was generated as a result of the Service, the Attachments tab Add (paperclip) attachment icon can be used to import a scanned or emailed document into Historion in association with the specific Service Record entered.

23 Add an Equipment Test Record

To add an Equipment Test Record;

Step 1. Add a new Equipment record if not already as described above under [Add Equipment](#).

Step 2. For an already Saved Equipment record select the Maintenance tab.

Step 3. Select the Test Records tab.

Step 4. Click the [Add](#) icon at the lower right corner of the Test Records list page.

Step 5. Complete as many fields in as many tabs as possible including methodology and findings.

Step 6. Click the [Save](#) icon.

Step 7. If a Test Report, log or other document/correspondence was generated as a result of the Equipment Test, the Attachments tab Add (paperclip) attachment icon can be used to import a scanned or emailed document into Historion in association with the specific Test Record entered.

24 Add an Equipment Defect

To add an Equipment Defect;

Step 1. Add a new Equipment record if not already as described above under [Add Equipment](#).

Step 2. If the Defect was found during a Service or Test episode record these first as described above.

Step 3. For an already Saved Equipment record select the Maintenance tab.

Step 4. Select the Defects tab.

Step 5. Click the [Add](#) icon at the lower right corner of the Defects list page.

Step 6. Complete as many fields in as many tabs as possible including the dropdowns for Service episode at which the defect was found or Test episode at which the defect was found if already recorded.

Step 7. Record a Resolution for the Defect if this has been determined.

Step 8. Click the [Save](#) icon.

Step 9. If a Defect Report, recommendation or other document/correspondence was generated as a result of the Defect the Attachments tab, Add (paperclip) attachment icon can be used to import a scanned or emailed document into Historion in association with the specific Defect Record entered.

25 Import Equipment Documentation

To import Equipment Documentation;

Step 1. Add a new Equipment record if not already as described above under [Add Equipment](#).

Step 2. For an already Saved Equipment record select the Attachments tab.

Step 3. Click the [Add](#) (paperclip) attachment icon.

Step 4. Browse to select the external file required (for example .pdf or .doc file) and select Open.

Step 5. Select the Document Type and any notes for the document then click the [Save](#) icon.

Step 6. Complete any metadata fields required at the lower left corner of the Document Details page by selecting the small [Add](#) icon and then selecting a metadata type and recording a value followed by **OK** to save the new metadata item for the file or **Cancel** to discard the new metadata item.

All documents or attachments that have been imported into the Historion database can be accessed from the Documents (paperclip) attachment icon in the Wearers ribbon panel.

26 Add a Training Record

To add a Training Record;

Step 1. Select the Training ribbon tab.

Step 2. Confirm the required Institute, Qualification, Course and Accreditation are available for the Training Record to be entered. These are basic data registers following standard list, add, edit and save conventions identifiable in Historion and are not described here.

Step 3. Click the [Records \(A+\)](#) icon.

Step 4. Click the [Add](#) icon at the lower right corner of the Wearer Training Records list page.

Step 5. Complete as many fields in as many tabs as possible including the dropdowns for Wearer, Course, Institute, Qualification Level and Industry Accreditation if already recorded (and results).

Step 6. Click the [Save](#) icon at the lower right corner of the Training Record details page.

Step 7. If a Training Record, Results Summary/Extract or other document/correspondence was generated as a result of the Training and is available, the Attachments tab Add (paperclip) attachment icon can be used to import a scanned or emailed document into Historion in association with the specific Training Record entered.

27 Add an Equipment Operator Record

To add an Equipment Operator Record;

Step 1. Select the Training ribbon tab.

Step 2. Ensure the Training Record details for the Operator (Wearer) are already added as described under [Add a Training Record](#) and the Equipment details added as described under [Add Equipment](#).

Step 3. Click the Operators icon.

Step 4. Click the [Add](#) icon at the lower right corner of the Operator Records list page.

Step 5. Complete as many fields in as many tabs as possible including the dropdowns for Wearer, Equipment and Training record applicable if already recorded.

Step 6. If an Operator Record, Licence/Permit or other document/correspondence was generated as a result of the Operator's endorsement and is available, the Attachments tab Add (paperclip) attachment icon can be used to import a scanned or emailed document into Historion in association with the specific Operator Record entered.

28 Add a new User to Historion

To add a new User to Historion;

Step 1. Obtain the new User's full name and Windows Network Login ID. Contact your IT Department and request that the user with given details be placed in your Historion Active Directory (network) group **Users cannot login without membership of this group.**

Step 2. Select the Admin ribbon tab.

Step 3. Click the [Users](#) icon.

Step 4. Click the [Add](#) icon at the lower right corner of the Users list page.

Step 5. Complete all User Details fields shown, only email is non mandatory

Field	Definition
User ID	The windows username used to log onto the network
SQL Login	Unless advised otherwise this is same as the User ID
Name	The full name of the new User
Email	The email address of the new User (not mandatory)

You must tick the User is Active box **for the user to log in.**

Step 6. Click the [Save](#) icon at the lower right corner of the User Details page.

Step 7. Click the **Assign Role** icon, lower right corner of the User Details page.
At least one Role must be assigned before a User can log in.

Step 8. Select the Role, Centre and Business Unit as required then click [Save](#) Do not select the Wearer Role unless granting a single wearer access to their own Dose Reports history in Historion.

Note: if you have changed an existing Wearer's details the Wearer must log off Historion and log back in again for the new details to take effect.

29 Run a Historion Report

To run a Historion Report;

Step 1. Select the Reports ribbon tab.

Step 2. Click the Reports icon, the first icon on the Reports tab.

Step 3. Select the required Report from the table of Report names at the top left of the Reports page.

Observe the Report Description displayed. This will help to ensure the correct report is selected.

Step 4. Complete any required report parameters shown in the lower left corner of the Reports page.

Parameters are collected in the Selected Parameters box; lower right corner of the Reports page.

Step 5. Click the Run icon at the lower right corner of the Reports page.

Step 6. Review the Report output displayed on the page.

If required in each case the Report;

- ✓ Can be printed using the Printer icon at the top left corner of the Report Viewer.
- ✓ Can be exported to Excel using the Export menu, top right corner of the Report Viewer.
- ✓ Can be exported to PDF using the Export menu, top right corner of the Report Viewer.

30 Analyse Consolidated Dose Readings Data

To Analyse Consolidated Dose Readings Data;

Step 1. Select the Reports ribbon tab.

Step 2. Click the [Inspect](#) icon.

Step 3. Select a Dose Report type filter at the lower left corner of the Inspect Data page.

Step 4. Using the tick boxes in the first column (the Select) column chose the Dose Reports that are to be combined into a new spreadsheet together using the Inspect Data tool.

Step 5. Click the Inspect Data icon at the lower centre of the Inspect Data page.

Step 6. Review exported Dose Report results.

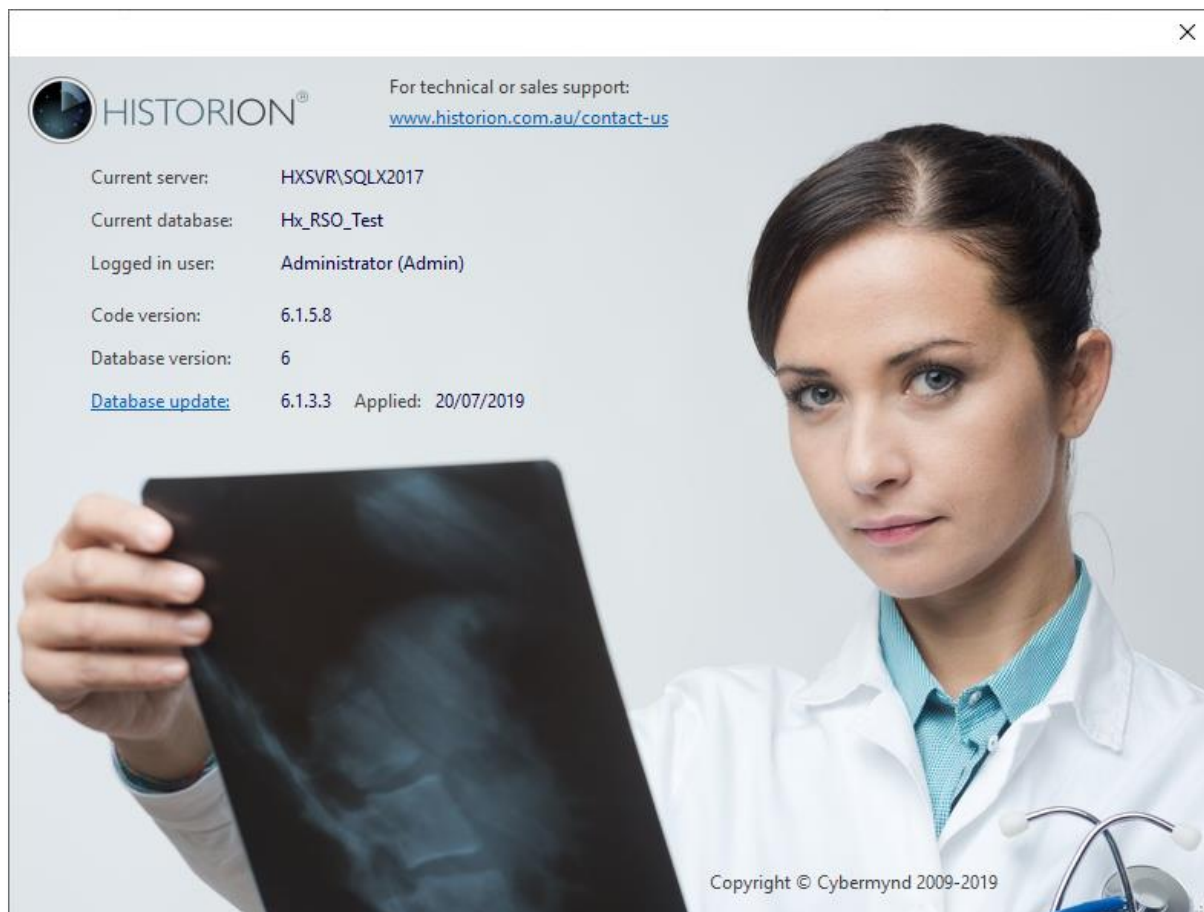
The options at the lower left corner of the page to exclude Dose Report Headers (other than the first row) and Dose Report Footers (if present) can be used to good effect to create a combined analysis spreadsheet for interrogating aggregated Dose Readings data. This replicates the outcome of an RSO laboriously inserting multiple Dose Reports into a spreadsheet and removing column headers.

31 Check Current Server and Database Connection Details

To check current Server and Database Connection Details;

Step 1. Select the Help ribbon tab.

Step 2. Click the [About](#) (information) icon.



Step 3. Note the Current Server and Current Database names. Combined these are the connection details with which the current Historion session is operating.

32 Check Current Database Update and Software Version

To check Current Database Update and Software Version;

Step 1. Perform the steps described above to show the about page.

Step 2. Note the Code version indicated, in the above example the code (program) version is 6.0.0.8

Step 3. Note the DB Update applied, in the above example the DB Update is 6.00.02

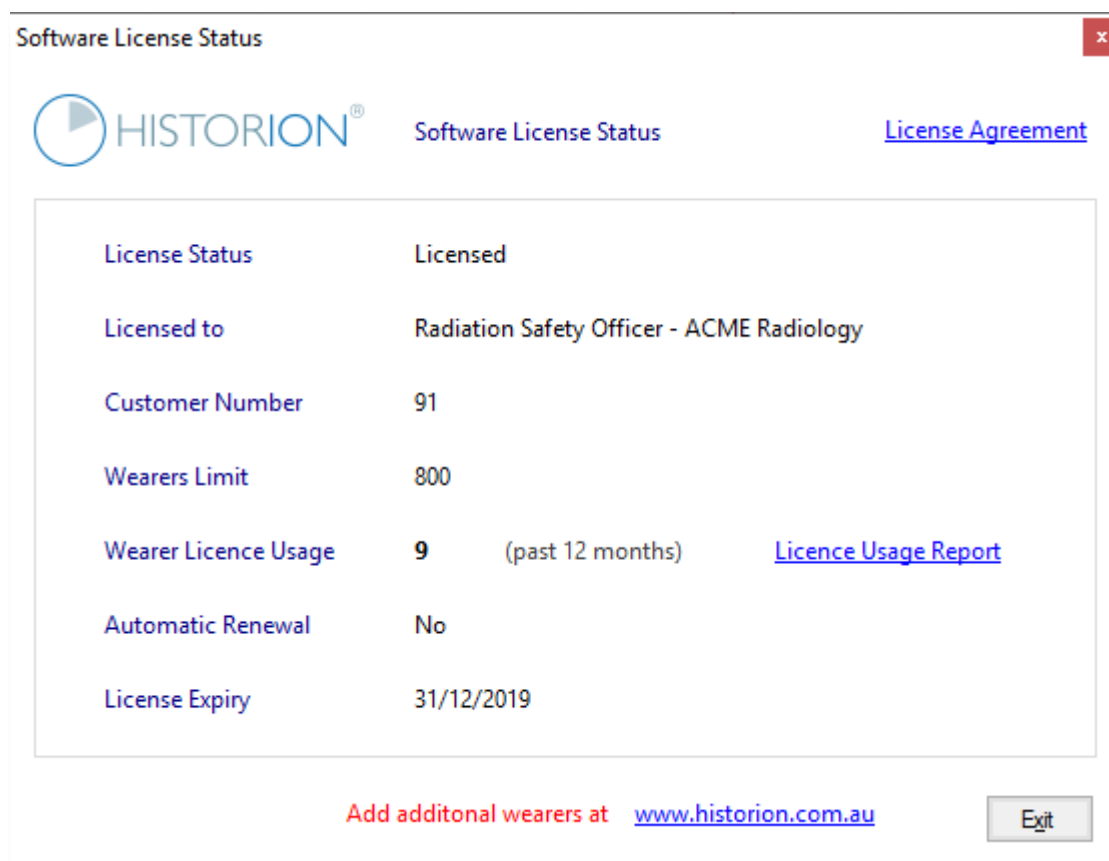
33 Check Wearer Licence Limit and Current Usage

To check Wearer Licence Limit and Current Usage;

Step 1. Select the Help ribbon tab.

Step 2. Click the Licence (padlock) icon.

Step 3. Observe the Licence Details dialogue displayed as shown below.



Please note:

The standard Historion End user Licence Agreement (EULA) is available only (PDF) and accessible by clicking the [Licence Agreement](#) link at the top right corner of the Licence dialogue page shown.

The [Report](#) link provides an MS Excel based extraction of all Wearers included in the Active Wearers count shown. Note that Active Wearers for licence purposes are any Wearers with a Dose Record in the past 12 months regardless of their current monitoring status.

34 Access Recently Edited Items

To access Recently Edited Items;

Step 1. Click the Recent Items box at the top left corner of the main Historion page as shown below.

Step 2. Select the required recent item and it will load directly without requiring list page navigation or search criteria and find results navigation;



35 Sign up for the Australian National Radiation Dose Register

To sign up for the Australian National Radiation Dose Register (ANRDR);

Step 1. Contact the ANRDR team at ARPANSA, details are at:

<https://www.arpansa.gov.au/our-services/monitoring/australian-national-radiation-dose-register/contact>

Step 2. Ensure an ANRDR Portal Username and Password are available and you can log in to the ANRDR online Portal at: <https://anrdr.arpansa.gov.au/login>

Step 3. Ensure a **Reporting Group Number** for your Organisation is available and known.

Step 4. Ensure an ANRDR **Site Number** for each of your Organisation's sites is available and known.

Step 5. If a Reporting Group Number and Site Number for each Site is not known contact ARPANSA.

Step 6. Select the Registration feature from the National Dose Register panel of the Tools Ribbon tab.

Step 7. Complete all the fields in the National Dose Register Registration details page then select [Save](#).

Step 8. Add all Sites in your organisation. Consult ARPANSA as to the Worksite Industry Classification and Standard Name or Dose Evaluation Procedure for each Site.

Step 9. Add applicable Centres within each Work Site record.

Step 10. Add applicable Dose Parameters to each Work Site. Consult ARPANSA if unclear here.

Note that Worksite Numbers are found in the ANRDR Portal with each Site record, check with ARPANSA if unclear.

Note: The Registration Details must be completed in order to submit data to the Australian National Radiation Dose Register. Any questions relative to this information, use and importance and the Reporting Group Number and Dose Mapping Type should be directed to ARPANSA.

36 Submit Data to the National Dose Register

To submit data to the National Dose Register;

Step 1. Ensure all steps described in the preceding section regarding registration are completed.

Step 2. Decide which Quarter of which Calendar Year will be submitted, this is important. Check with ARPANSA if uncertain as to from when the ANRDR submission history for your organisation will start.

Step 3. Run a Submission Readiness check; select the Readiness feature from the National Dose Register panel in the Tools Ribbon tab.

Step 4. Enter the required year in the Year box and select the required Quarter from the dropdown.

Step 5. Select the [Check Readiness](#) link. Historion will check the ANRDR readiness of Wearers with Dose Readings during the nominated Year and Quarter. The five fields indicated below are checked.

Note: The following details are mandatory for Wearer data when submitting to the ANRDR. A Submission File cannot be exported for a Quarter if any involved Wearers are missing any of;

- ✓ Given Name
- ✓ Family Name
- ✓ Date of Birth
- ✓ Sex
- ✓ ANRDR Worker Classification

Step 6: Complete all missing Wearer Data fields as displayed in the Readiness Check results window. This information can be saved to text file for future reference using the [Save Check Outcome] button.

Step 7. Re-run the Readiness Check to ensure it comes up clear and all mandated Wearer Data for the required quarter has been entered.

Step 8. Select the Submissions feature in the National Dose Register panel in the Tools Ribbon tab.

Step 9. Select the [Submit](#) icon at the lower right corner of the National Register Submissions page.

Step 10. Ensure the required Year and Quarter are selected.

Step 11. Click the [Generate Submission File](#) feature and save the submission file to a suitable well organised folder location.

Step 12. Login to the ANRDR Portal web site and submit the quarterly dose readings data, using the Submission File generated above, by following the steps advised by ARPANSA in their ANRDR User Guide at the link below.

https://www.arpansa.gov.au/sites/default/files/employer_portal_user_guide.pdf

Contact ARPANSA or Historion Support if any difficulties are experienced in transmitting the quarterly submission file using the above process.

37 Copy Historion to a new Workstation

To copy Historion to a new Workstation;

Step 1. Check with your IT Department if you are unclear as to the precise location of your Historion installation and whether you can, or should, copy Historion to another workstation. Some IT desktop environments are extremely secure and incorrect setup can result in unintended outcomes.

Step 2. If the Historion.exe file is located centrally, on a network share, the setup process simply involves adding a shortcut on the new workstation.

If the Historion.exe is located on the C:\ drive of workstations, not centralised, then you will need to copy the Historion folder from the originating workstation to the new workstation then add a shortcut.

If unclear, check with your local IT Support, Historion Support or page 49 of the Historion Implementation Guide Genre 6 at the link below;

<https://historion.com.au/uploads/documentation/Historion%20Implementation%20Guide%206.pdf>

Historion support can be contacted at: <https://www.historion.com.au/contact-us>

38 Acceptance Test Historion Upgrades

To Acceptance Test a new Historion upgrade;

Step 1. Obtain a copy of the Historion Acceptance Testing Checklist at the link below;

<https://historion.com.au/uploads/documentation/HistorionAcceptanceTestingChecklist.pdf>

Step 2. Work through the check list items and ensure all listed checks pass.

Note: the Historion Acceptance Testing Checklist tests all *interfaces* between Historion and various aspects of your desktop, Historion database, Microsoft Office and required core aspects of your computing environment, to ensure compatibility and key features are operating without local security or the most common localised setup problems.

If you have any concerns or need to raise matters from the testing process, please contact your local IT support in the first instance, then Historion support for next level troubleshooting and assistance.

Historion support can be contacted at: <https://www.historion.com.au/contact-us>

39 Obtain Further Support

To obtain further Historion support;

Please go to <https://www.historion.com.au/contact-us>

Or click the Support (telephone) icon in the Help ribbon tab and record your details.

One of our speedy Help Desk technicians will contact you shortly.