Introduction

This reference guide is aimed at Managers who are required to generate reports using existing Report Layouts and save these reports & associated filtering to their *"My Reports"* page

Note: The terminologies used in this guide maybe different in your organisation

Previewing RiskMan Incident Reports

To preview an Incident report, from the menu select *Reports -> Incidents*
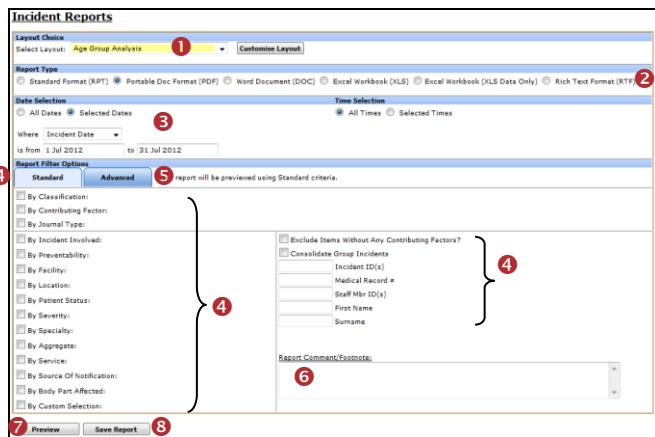
RiskMan comes with a set of pre-defined Incident reports. All aggregate reports *(with the exception of the By Classification.... and By Contributing Factors reports)* can be customised to suit your organisation's needs by clicking on the **Customise Layout** button.

*Note: Refer to the **RiskMan Incident Custom Reports Guide** for more information on how to create custom report layouts*

Step ❶: Select a Layout Choice

The first step to previewing a RiskMan report is to select a report style from the **Select Layout** down list at the top of the screen. The list of reports that will be available to you in the **Select Layout** list will be dependent on whether the reports have been Site/Region restricted. If they have, then you will only see reports in this list that match your User Profile "Site/Region" restrictions and those that have not been restricted.

All RiskMan aggregate reports (reports showing collective statistics about incidents) collate adverse incidents into sections grouped by various fields.

It is optional to display a chart in an Aggregate report. If the report needs a chart, this can be done through the Custom Reports, by clicking on the **Customise Layout** button - refer to the **RiskMan Incident Custom Reports Guide** for more information.

Selecting the report type is equivalent to deciding "What question do I want to ask about my adverse incidents?" Examples of reports include:

Q. **WHERE** are Adverse Incidents occurring?

A. Select… **"By Site"** or
"By Location" or

Q. **WHEN** are Adverse Incidents occurring?

A. Select… **"Time Of Day Analysis"** or
"Day Of Week Analysis"

Q. **WHO** are the people involved in Adverse Incidents?

A. Select… **"By Incident Involved"** or
"Age Group Analysis" or
"By Patient Status"

Q. **WHICH DIVISIONS** of the Organisation are associated with the Adverse Incidents?

A. Select… **"By Program"** or
"By Aggregate" or
"By Specialty"

Q. What is the **NATURE** of the Adverse Incidents?

A. Select… **"By Classification"** or
"By Classification - Summary" or
"By Classification – Summary (Extended)"

Q. What is the **SEVERITY** of the Adverse Incidents?

A. Select… **"By Outcome"**

Q. **WHY** is an Adverse Incident occurring?

A. Select… **"By Contributing Factor"**

Q. What is the **NOTIFICATION PROCESS** for Adverse Incidents?

A. Select… **"By Notification Delay"** or
"By Source of Notification"

Q. What is the **RISK** posed by Adverse Incidents to the Organisation?

A. Select… **"By Risk Stratification"**

Other available (non-aggregate) reports showing more detailed degrees of information about incidents include…

"Comprehensive Adverse Incident Report" (shows all standard incident fields)
"Comprehensive Custom Report" (only shows fields the user has permission to)
"Batched Insurer Report"
"Journal Analysis"
"Notifications"
"Pending Feedback Requests

Non-aggregate reports do not have attached charts

Comprehensive Custom Report

The Comprehensive Custom Report is a detailed report, only displaying the sections and fields that you have permission to view as stipulated by your user permissions. On selection of this report there will be an option to display the **Review History** at the bottom of the report and specify the order in which the **Journals** appear i.e. Date or Journal Type order

*Note: The **Comprehensive Adverse Incident Report** only shows the standard Incident fields and is not customised to suit your organisation's Incident form. Generally this report is not used*
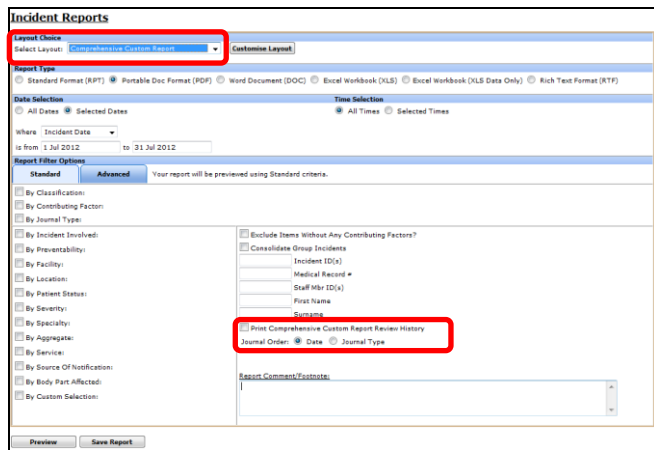
To specify the order in which the Journals appear on this report

1. Check mark the **Journal Order = Date** if the Journals are to appear in **Date Entered** order *(see example below)*

2. Check mark **Journal Order = Journal Type** if the Journals are to appear in **Type** order e.g. Correspondence Received, Correspondence Sent

To print the Review History on the Comprehensive Custom Report

3. Check mark the **Print Comprehensive Custom Report Review History** option *(see example below)*

Example: Comprehensive Custom Report showing the Journals in Date Entered order and the Review History

Non-Customisable Reports

The following aggregate reports contain charts, but are not customisable reports because of the layout of the report:
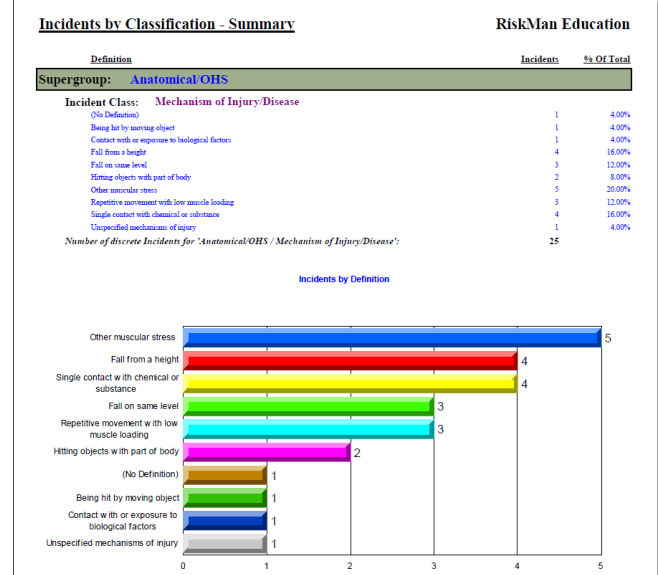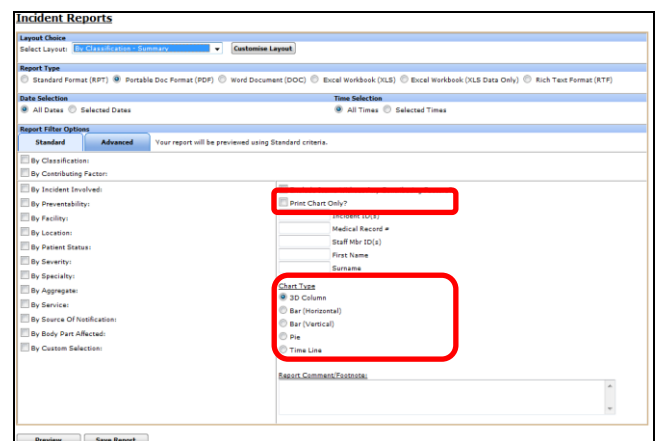
*   *By Classification*
*   *By Classification - Summary*
*   *By Classification - Summary (Extended)*
*   *By Contributing Factor*

When you select one of these reports, the following options will display in the filtering section of the Reports page;

*   **Chart Types** - *(see example below); or*

*   **Print Chart Only** – *(see example below)*

For all other customisable aggregate reports, the option to print a chart as well as selecting a chart type is achieved via the Custom Report Builder page - refer to the ***RiskMan Incident Custom Reports Guide***

*Note: You can create a custom report based on the RiskCat Classifications as well as the Contributing Factors via the Custom Report Builder page – refer to the **RiskMan Incident Custom Reports Guide***

Example: By Classification Summary report using the Bar (Horizontal Chart). In this report an incident can have multiple classifications so potentially an incident can be counted more than once if it has been classified more than once

Step ❷: Select an Output Format

Nominate the file format in which the report is required.

- **Standard Report (RPT):** The report is produced as a standard "web page"; with no pagination (i.e. no headers/footers/ page breaks)

- **Portable Doc Format (PDF):** The report is created using the Adobe™ PDF format. The advantage of this format is that it cannot be edited

- **Word Document (DOC):** The report is created in the Microsoft™ Word format, and may be edited using MS Word™, if available

- **Excel Workbook (XLS):** The report is created in Microsoft™ Excel, and may be edited using MS Excel™, if available. The report **will not** be displayed in a spreadsheet format. If this is required use the **Excel Workbook (XLS Data Only)** option

- **Excel Workbook (XLS Data Only):** The report will open in Microsoft™ Excel in a spreadsheet format. For more details, refer to the section **"Exporting Report Data to Spreadsheet Format"** in this document

- **Excel Workbook (XLS Grid Format):** The report will open in Microsoft™ Excel in a spreadsheet format. For more details, refer to the section **"Exporting Report Data to Spreadsheet Format"** in this document

- **Rich Text Format (RTF):** The report is created in an RTF document format which is editable by a variety of document editors e.g. Word™

Note: All output formats above where the report is an aggregate report, with the exception of Excel Workbook (XLS Data Only) and (XLS Grid Format), can produce an attached chart at the end of each report (where applicable). Excel™ simply creates a data export in flat (one row per incident record) format, with optional grouping fields, and no attached chart. However charts can be created in Excel™.

Exporting Report Data to Spreadsheet Format

There are two options for exporting data to Excel in RiskMan, determined by your **Report Type** chosen on the report configuration page:

- Excel Workbook (XLS Data Only), and

- Excel Workbook (XLS Grid Format)

The **XLS Data Only** option will put your data into a 'flat' format (i.e. 1 row per record). You will need to create a **Layout** specifically for exporting your desired data.
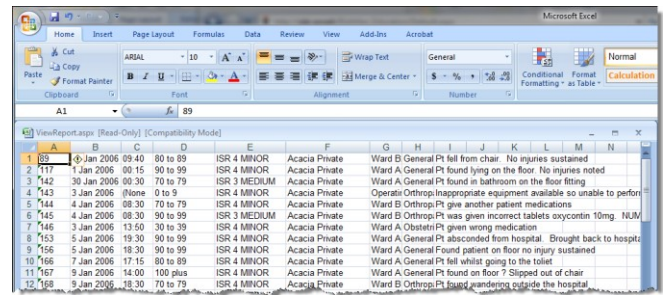
Sample "XLS Data Only" output

It should be noted that the XLS Data Only output will not export the names of the fields you have exported as column headers in the resulting spreadsheet.

The **XLS Grid Format** option is designed to utilise your existing layouts, and will export your data with the grouping used in the layout, and will include column headers.
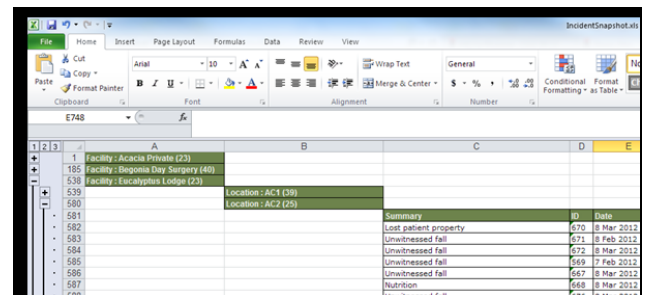
Sample "XLS Grid Format" output

It should be noted that the XLS Grid Format output option will not export any data from sub reports included in your report layout.

Exporting to Excel using the "XLS Data Only" output

If you wish use the XLS Data Only report type, you will need to create a report layout that contains all your fields on **one row**. You can select up to 30 fields to be included in the report.

The following **will not** be exported to Excel™

- Report Title & Organisation Title

- **Layout Options** & **Colour schemes** from the Report Settings

- Page Headers

- Charts

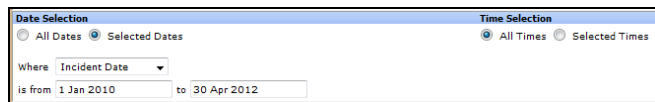Consider the following when setting up your report:

1. In the **Report Settings** set the **Page Type** and **Page Size** so that you can fit all the fields on one row

2. In the **Details** section drag & drop up to 30 fields on Row 1 **(only)**

   Tip: Each time you add a field, make the width of the field as small as practical so you can still recognise what the field is - you may also wish to relabel the field e.g. "Incident ID" to "ID"

Step ❸: Select a Date/Time Period to Review

The next step is to define the **date period** to which this report applies. In the **"Where"** list select what type of date you will be basing this report on.

Note: The list of date fields and which date is selected by default is customisable. For those with suitable permissions, the date list is customised from Administration -> List & Codes Maintenance under the (Incidents) Incident Report Date Selection list. You can add and remove dates as required

Date Selection	Time Selection
○ All Dates ⦿ Selected Dates	⦿ All Times ○ Selected Times
Where Incident Date ▾	
is from 1 Jan 2010 to 30 Apr 2012	

Note: The date selection can be shown in the footer of every page

- To run the report over all date periods click the **[⦿ All Dates]** option

- To run the report over a specific period, click the **[⦿ Selected Dates]** option. Select the date type from the **"Where"** list and enter the **[Is From]** and **[To]** dates to define the period over which the report will be run

The list of dates can be based on any date field on your Incident Entry form. Some of the dates that may appear in your **"Where"** list might include:

- **Incident Date:** When did the incident occur

- **Notification Date:** When did you find out about the incident

- **First Posted Date:** When was the incident first reviewed and accepted/posted

- **Last Posted Date:** When was the incident last reviewed and accepted/posted

- **Date Closed:** When was the incident Closed

- **Rec # Completed Date:** When were the recommendations # completed *(if the Formal Review section has been added to your Incident Form)*

  Note: # represents the specific Recommendation number. There can potentially be 8 recommendations.

Optionally a **time period** can also be selected

Date Selection	Time Selection
○ All Dates ⦿ Selected Dates	○ All Times ⦿ Selected Times
Where Incident Date ▾	From: 09:00 To: 13:00
is from 1 Jan 2010 to 30 Apr 2012	
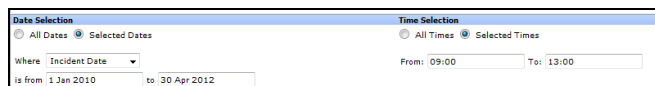
- To run the report over all time periods within a selected date range or all dates, click the **[⦿ All Times]** option

- To run the report over a specific period, click the **[⦿ Selected Times]** option. Then enter the **[From]** and **[To]** times to define the period over which the report will be run

*Note: The times must be in a 24 hour period between 0:00 and 23:59. If you wish to run your report over a 24 hour period e.g. 7pm – 7am it will be necessary to create a **Shift** report – refer to the **RiskMan Incident Custom Reports Guide***

Step ❹: Apply Standard Report Filtering

Standard Filtering which is available under the **Standard** tab, allows you to filter your reports based on pre-defined fields.

*Note: The list of fields under the **Standard** tab is customisable. For those with suitable permissions, the fields are customised from Administration -> List & Codes Maintenance under the (Incidents) Incident Report Filter Options list. You can add and remove fields as required. These fields will only be "List" or "Classification Selector" fields. They will not include Yes/No field or Text fields. If you want to filter by one of those fields you will need to create a filter under the "Advanced" tab*

List Fields: If the field is a list field e.g. Incident Involved, Site, Location, Program, and Outcome; check mark the field and select your criteria from the list. To select more than one item in the list hold your **CTRL** button and select as required

Classification fields: If the field is a classification field e.g. RiskCat or Contributing Factors, check mark the field and the Classification selector will open. Select the classifications from the list (you can select more than one)

Text/Numeric fields: If the field is a text/numeric field e.g. Client/Medical/Unit Record #, Incident ID(s), First Name, Surname enter the details into the field

- **Incident ID(s)**, **Client Record #, Staff Mbr ID(s)** – If entering more than one ID separate the IDs with a comma e.g. 34,57

- **First Name, Surname fields** – These fields are based on the person affected in the Incident. The wildcard **"*"** can be used in these fields to denote other non-specific text e.g. If **sm*th*** is entered into the **Surname** field, then the report will search for all incidents where the surname of the person affected is like **"smith"** or **"smythe"** where any letter can be substituted for the *

	Incident ID(s)
	Medical Record #
	Staff Mbr ID(s)
	First Name
Sm*th*	Surname

Selecting more than one filter criteria

If selecting more than one item in a field, the search will be conducted on an **"OR"** basis e.g. "Program = Emergency" OR "Program = General Medicine"

If selecting criteria from more than one field, then the filter will be based on an **"AND"** basis e.g. Report will only show incidents where ("Program = General Medicine" **OR** "Program = Emergency") **AND** ("Outcome = ISR 1 SEVERE" **OR** "Outcome = ISR 2")

By Custom Selection

If you are unable to produce a report based on the standard filters

- That you would like to use regularly; or
- You are unsure how to use the Advanced Filters; or
- You are unable to create a Standard or Advanced filter

User defined custom selections can be created for your organisation

Note: Assistance with creating these selections can be done by contacting RiskMan support – support@riskman.net.au

To use custom selections

1. Check mark **"By Custom Selection"**

2. Highlight the custom selection/s as required *(hold CTRL key if selecting more than one)*

3. You can combine Custom Selections with other Standard filters
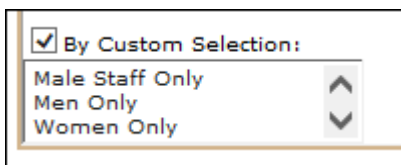
Consolidate Linked Incidents

If checked, then Incident notifications that are linked *(for example a client and a staff member are involved in an aggression related incident)* will be classed as one event in the total count. The master notification for the selected date range will become the main incident for the report with an optional sub-list of linked incidents appearing underneath (this listing will be dependent on the selected date range).

If unchecked, each incident within a link will be counted as a separate incident and will appear so on the report.

In order to display the linked incident notifications in a report, it will be necessary to create a "Linked Incident" sub-report in the custom reports *(refer to the RiskMan Incident Custom Reports Guide for more information).*

To consolidate your linked Incidents

1. Select your report from the **Select Layout** list

2. Check the **Consolidate Linked Incident** option on the Incident Reports page *(as per example below)*

3. Press **Preview** *(see example below)*

Example of a Grouped Incident
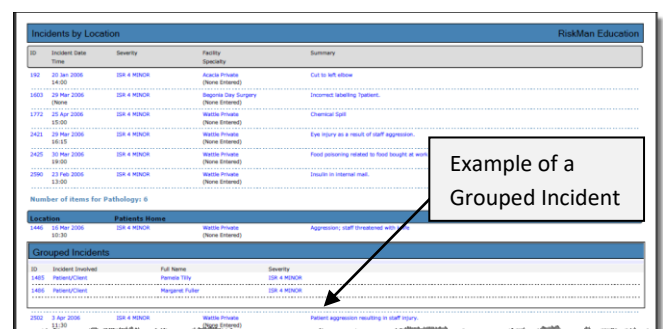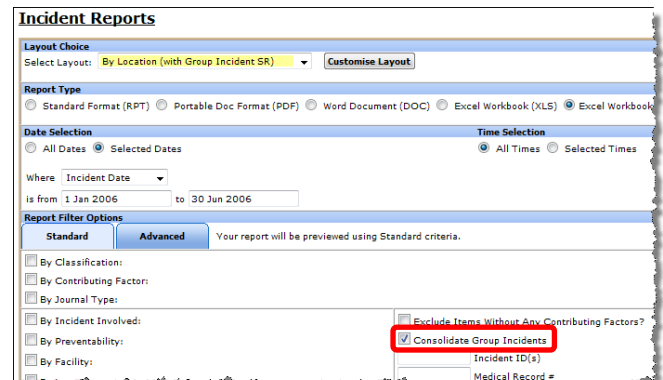
Example: Incident Report showing the Master & Child Notifications of a Linked Incident

Step ❺: Apply Advanced Report Filtering

The Advanced Filter (available under the **Advanced** tab) will allow you to create your own filtering options for a specific report. If the filtering conditions are to be used again they must be saved with a selected report (see Step ❽ for information on how to save reports)

Note: If using Advanced Filtering, the filtering from the Standard tab will not be used (and vice-versa)
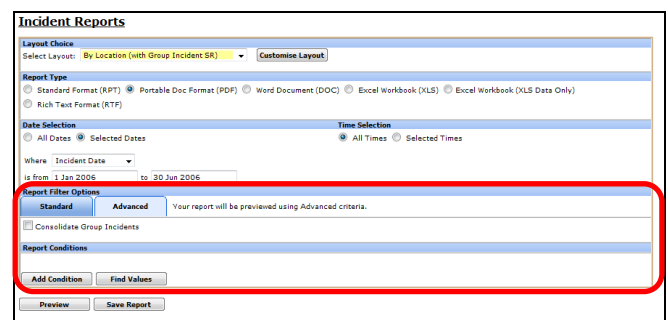
Create a filter

1. Press **Add Condition** ❶

2. Select a field from the drop down list ❷

3. Select a logical test ❸

   - **For List & Classification selection fields use** =, <> (not equals), Is Null (empty), Is not null (not empty), Like, Not Like

   - **For Date, Time or Numeric fields use** =, <>, >, >=, <, <=, Is Null, Is Not Null

   - **For Text fields use** Is Null, Is Not Null, Like, Not Like

4. Enter or select the criteria for the filter ❹

   - **Text fields:** Enter the text. Wildcards **"%"** can be used e.g. **Summary like %fall%** which means the word "fall" must appear somewhere in the "Summary" field

   - **Date fields:** Enter the date as **1 Jan 2012**

   - **Time fields:** Enter the time as **15:15** (24 hr clock)

   - **Numeric fields**: Enter the number e.g. 4, 50

   - **List fields:** Press the **Find Values** ❺ button and select **ONE** value from the list (this ensures the correct criterion is selected).

- **RiskCat Classifications:** Press the **Find Values** ❺ button and select **ONE** value from the Classification list.
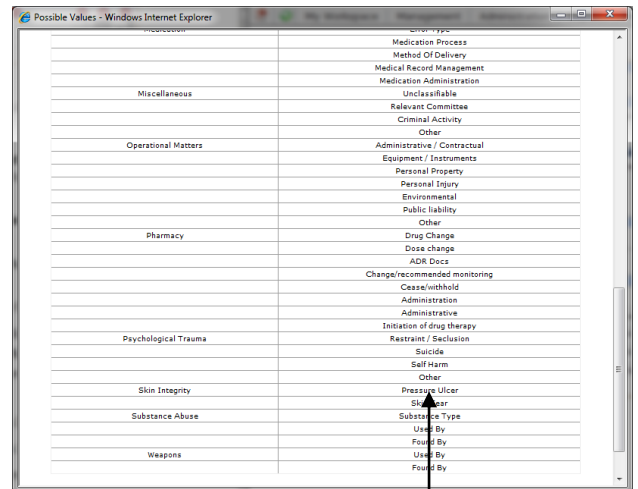
5. If another condition is required e.g. The filter is based on more than one value from the same field or from different fields, press **Add Condition** ❶

6. If 2 or more conditions are added to your filter, select **"And", "Or", "But Not"** ❻ at the beginning of the Condition *(not required for the first condition)*

   When to use "And": When more than one condition must be met e.g. "Facility = Acacia Private" **AND** "Incident Class = Pressure Ulcer", then both conditions must be met before the incident notification is included in the report

   When to use "Or": When at least one condition must be met e.g. "Outcome = ISR 1 Severe" **OR** "Outcome = ISR 2 High", then only one of the conditions must be met before the incident notification is included in the report

   When to use "But Not": Used with the RiskCat Classifications **only**; e.g. if you select "Incident Class = "Fall" **BUT NOT** "Incident Class = Self Harm", then if the incident has a definition selected from the "Fall" class but also has a definition selected from the "Self Harm" class, it will **not** be included in the report
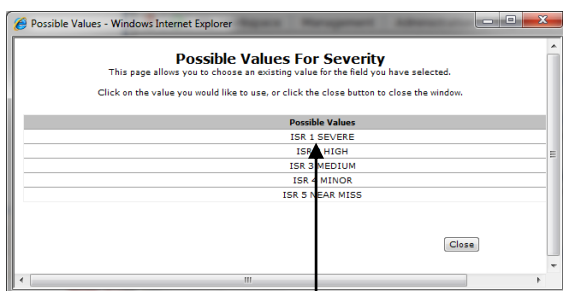
7. If required add **Brackets** ❼ around the conditions. Brackets may be required around some conditions to ensure the alert is triggered correctly

   A common scenario where you would need to use brackets is when:

   - You have more than one condition to test for, and

   - At least one of those conditions has more than one option that could satisfy it

Example: In this advanced condition there are 3 distinct conditions: Facility, Severity and Incident Class, but Severity has 2 options. Therefore we would place a bracket at the beginning of the first Severity condition and one at the end of the second Severity condition

8. If you wish to delete a condition press the **Delete** ❽ button next to the condition. You may need to modify your **"Or", "And"** or **"But Not"** options and your **brackets**

9. If you wish to re-order your condition statements use the **Directional** ❾ buttons - **Up** ⬆ or **Down** ⬇ next to the respective condition. You may need to modify your **"Or", "And"** or **"But Not"** options and your **brackets**

Additional Incident fields available for filtering

In addition to the fields that are available from your Incident Entry form, there are some 'virtual' fields that can also be used. They include

- **Incident Day Name:** Can be used to filter your report by particular days of the week e.g. Incidents that have occurred over a weekend - Saturday & Sunday

- **Is Linked Incident:** Can be used to only show Incidents that are included in a link only notification

- **Is Master Incident:** Can be used to only show the Master (i.e. source) report in a group only notification

- **Journal Has Been Modified:** Can be used to filter Incident Reports where the Journal entry has changed

- **Sequence:** This field represents the number of times the posted version of the Incident has been posted. For example if Sequence = 1 then you are wanting to report on the first time the incident is posted

- **Sequence No:** Not relevant in Incident Reports because the notifications in the reports must be Posted

Step ❻: Add a Footnote

All aggregate reports may be annotated to include a footnote on the last page, directly under the chart.

If required, enter comments into the **Report/Comment Footnote** box.

If you wish to edit the footnote (as a result of analysing your report)

- Enter a comment such as "Enter Comments here". This will enable a text box to appear at the end of your report

- Output the report to Word™

- You can then edit the footnote by removing the words "Enter Comments here" and entering your Analysis
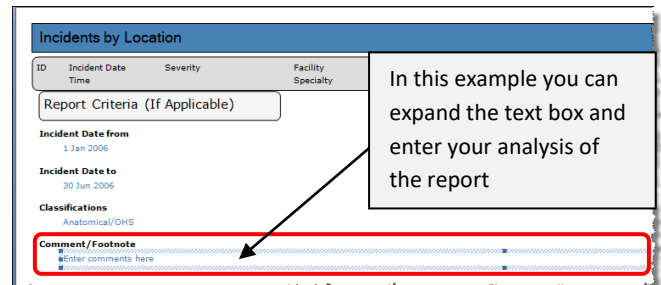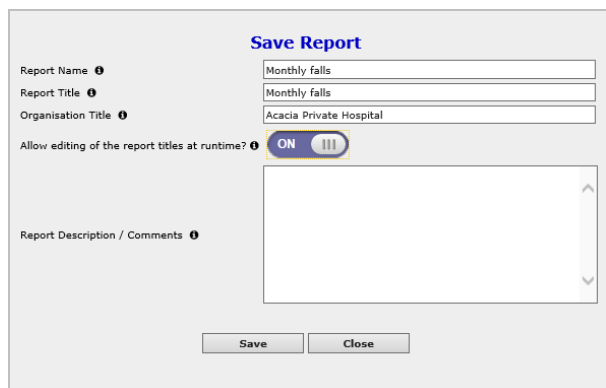

Step ❼: Preview Report

Click the **[Preview]** button to display an onscreen preview of the selected report.

Step ⑧: Save Report

The selected report, date selection type and filter criteria can be saved to your **"My Reports"** page. MyReports is your personalised list of reports. By selecting a report from your **"My Reports"** page all that is required to run the report is to select a date range and the output format e.g. PDF, Word™, Excel™. Users with suitable permissions can then share their saved reports to selected users or templates. Depending on your permissions, you may also have access to save your report to the Reports Library. This allows you to save reports centrally where other users with suitable permissions can obtain a copy to keep in their own MyReports page. For more information about accessing and utilising the reports library, see the *Report Library guide*.

To save a report

1. Select a report from the **Select Layout** list

2. Select the **date type** from the **"Where"** list that will be used e.g. Incident Date

3. Select the criteria or create an advanced filter for the report e.g. Medication Incidents for a specific Site

4. Press **Save Report**
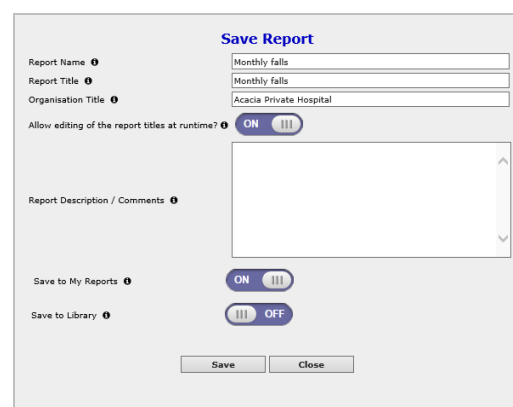
Example: Saving a Report to your "My Reports" page

- **Required:** Enter the **Report Name** - this will appear in the list of reports on your **My Reports** page

- **Required:** Enter the title of your report in the **Report Title** field. This title will appear at the top of every page in the report

- **Optional:** Change the **Organisation Title** if you wish to override the name of your organisation that appears in the top right corner of your report e.g. to your Campus name, enter here

- **Optional:** Select 'on' for **"Allow editing of the report at runtime"** if the users who have permission to run this report from their "My Reports" page are able to change the **Organisation Title** and **Report Title** prior to running the report

- **Optional:** Enter a description of the report in the **Report Description / Comments** dialogue box e.g. Description of what is contained in the report; the target audience e.g. specific committee, board report; how often it should be generated - monthly, quarterly; the Report template used

5. Click **Save**

6. Click **Close**

Note: If you **do not** have access to the Reports Library, your report will automatically save to My Reports. If you **do** have access to the Reports Library, your Save Reports screen will look as below:
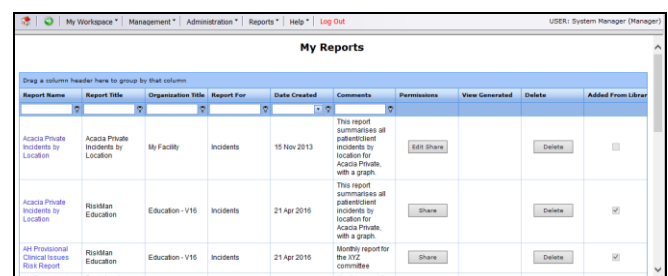

You will have the option to either save the report to My Reports, to save to the Reports Library or both. For more information about saving to the reports library, see the *Report Library guide*.

My Reports

Reports that you have saved from your Incidents Reports page or reports that you have access to view that have been shared to you, can be accessed from your **"My Reports"** page under the **"Reports"** menu option

Note: Your list of reports will show any Register specific reports that you have saved or have been shared to you e.g. Incidents, Feedback, Risk Register, and Quality Activity Reports
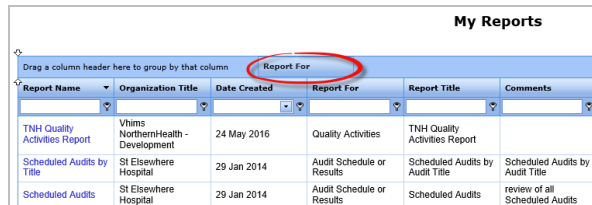

To group your list of Reports

1. Click on the column heading that you wish to group your reports by e.g. **"Report For"**
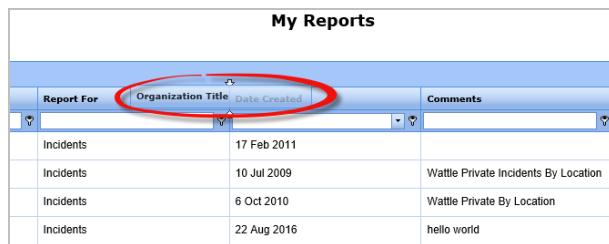
2. Holding your mouse drag the column heading to the space provided at the top of your list of reports and release your mouse *(refer to example below)*

3. To save the grouping press **Save Grid Layout**

4. To return your grid layout to the default layout press **Clear Grid Layout**
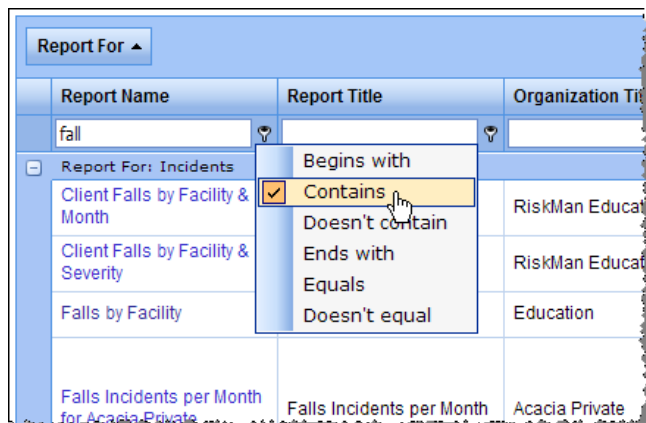

To change the order of the columns in your report grid

1. Click on the column heading that you wish to move and drag to the new position - release your mouse *(refer to example below)*

2. Repeat step 1 until you have re-arranged your columns

3. To save your layout press **Save Grid Layout**

4. To return your grid layout to the default layout press **Clear Grid Layout**

To filter the My Reports being displayed

1. Beneath each column heading is a white text box where you can add filter criteria to your list

2. Type your filter criteria, and choose the type of logical test you wish to perform by clicking on the funnel icon (as per the below example)

3. It is possible to apply filters to multiple columns

4. To remove a filter, simply delete the criteria (e.g. *fall* in the above example)

*Note: Any filters you apply on this page will be **remembered**, even after logging out of RiskMan and logging back in.*

To change the number of displayed reports

1. The default number of reports displayed on your My Reports page can be modified by selecting from the **Rows Shown** list

2. If there are more reports than displayed on your My Reports page, you will have the option to scroll to view more reports
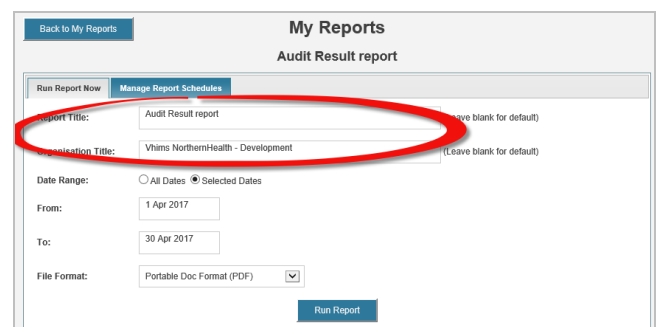
To view a report

1. Click on the **Report Name** in the list

2. Select the **Run Report Now** tab

3. If the **Report Title** and **Organisation Title** fields are editable, before running the report you will have the option to change these titles if required e.g. adding the Month or Quarter at the end of the report title

4. Select **All Dates** or **Selected Dates** and enter your date range

5. Select the output format for the report e.g. PDF, Word

6. Press **Run Report** – the report will be displayed

7. To return to your **My Reports** listing page, press the **Back to My Reports** button

To schedule a report so that it is generated automatically

1. Click on the **Report Name** in the My Reports list

2. Select the **Manage Report Schedules** tab

3. Give your Schedule a meaningful name in the **Schedule Name** field e.g. Monthly Patient Falls Report

4. Add a description for your schedule in the **Schedule Description** e.g. Generated on the 5th of the month for the Falls Sub Committee meeting

5. Determine the period of time over which the report will be run and enter this into **the Report Time Frame** field. For example, if you wanted to create a schedule that reported on the previous calendar month your settings here might read: The previous **1 Months(s)** up to **Prior Month End**

| Report Time Frame: | The previous | 1 | Months(s) ▾ | up to | Prior Month End ▾ |

6. Determine how often you would like the report to generate in the **Run Frequency** field e.g. Every **Month** on the **5th** at **8:30am**

| Run Frequency: | Every | month | on the | 5th | at | 08 | : | 30 |

7. It is advisable to check the next two fields, which will confirm via email if the report was successfully generated or whether the schedule failed

8. Select **Save Schedule**

Note: You can set multiple schedules for a single report if required

Your saved schedule will appear in a table:

| Schedule Control	Report Schedule ID	Schedule Name
⏸ 🗑 ⚡	1	Schedule for Monthly Patient Falls Report
⏸ 🗑 ⚡	2	Schedule for Weekly Patient Falls Report

You have the ability to **Pause**, **Delete** or **Run** each saved Schedule using the controls indicated above

To return to your **"My Reports"** listing page, press the **Back to My Reports** button

To share or edit a shared report

1. Click on the **Share** or **Edit Share** button next to the report you wish to share/edit share on your **My Reports** page (this is a user permission)

2. **To share a report:**

   - Either search for specific users, highlight the users and press **Authorise;** or

   - Select the **Register** the template belongs to and then highlight the **Template** and press **Authorise**

3. **To remove sharing on a report:**

   - Either highlight the users that have already been shared the report and press **Remove** or

   - Highlight the templates that have been shared and press **Remove**

4. Press **Save** to save your changes
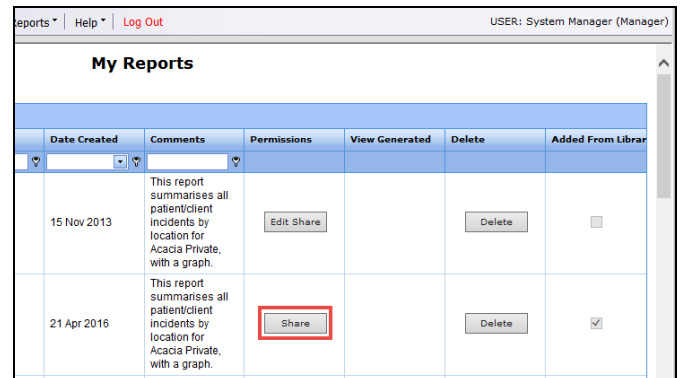
To delete a Report

Note: The deletion of a My Report cannot be undone

1. Click on the **Delete** button next to the report name

2. The report will be removed from your "My Reports" list

3. If the report was shared to other users, then it will be deleted from their "My Reports" list
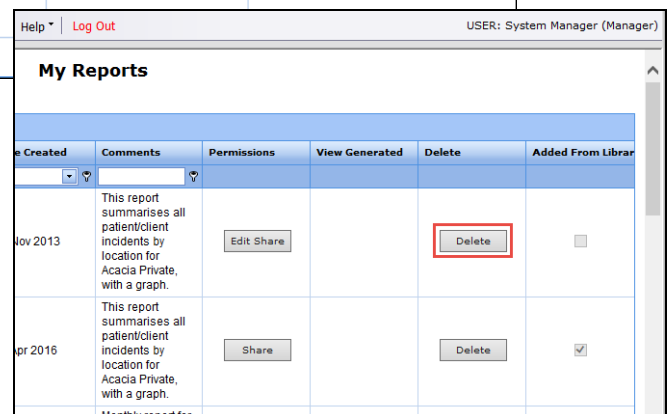
Privacy and Security in Qualitative reports

Sometimes a user will not have permission to see a particular field such as when that field is set to 'do not display' in their User Template. The question is; will that field display when they run a report? The answer is that it depends on the configuration of your system!

For those that have access to Global Settings, this is where that feature is controlled. (see Global Settings guide). The system administrator can control whether report fields to which the user doesn't have permission are masked when the report is generated. They can also control what mask to use when obscuring 'don't display' fields (e.g ***** which is the default).

Below is an example of the same report generated by the same user with the field masking option both on and off:

Field masking Global Setting off:

Incident ID	Incident date	Incident time
Clinical review / progress notes		
1	17 Nov 2015	08:00
On review noted that patient had not been eating meals as provided		
2	20 Jan 2016	08:00
(None Entered)		

Field masking Global Setting on:

Incident ID	Incident date	Incident time
Clinical review / progress notes		
1	17 Nov 2015	08:00
**********		
2	20 Jan 2016	08:00
**********		