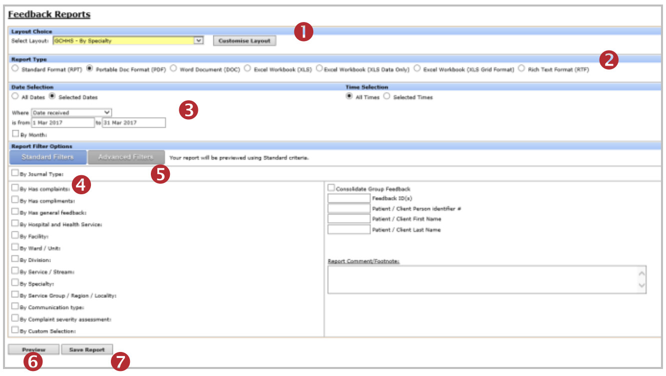
Introduction

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 Feedback Reports

To preview a Feedback report, from the menu select *Reports -> Feedback*



RiskMan is delivered with a **Comprehensive Custom Report** displaying all Feedback fields a user has permission to view and a **Management Summary** which includes multiple statistical reports in one. All other reports layouts need be created via the **Customise Layout** page on the Feedback Reports page

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

Step ❶: Select a Layout Choice

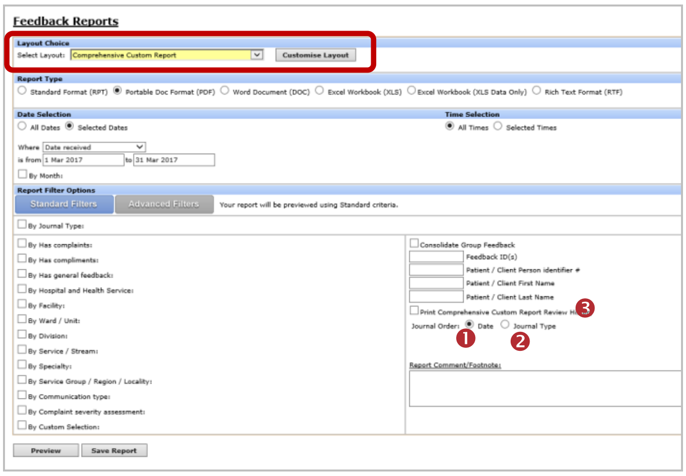
The first step to previewing a RiskMan report is to select a report style from the **Select Layout** drop down list at the top of the screen. The list of reports that will be available to you in the **Select Layout** list will be dependent on whether the reports have been Site/Region restricted. If they 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 feedback) collate feedback into sections grouped by various fields

It is optional to display a chart in an Aggregate report. Charts are added to custom reports, by clicking on the **Customise Layout** button – refer to the ***RiskMan Feedback Custom Reports Guide*** for more information

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



To specify the order in which the Journals appear on this report

1. Check mark the **Journal Order = Date** ❶ if the Journals are to appear in **Date Entered** order *(see example below)*
2. Check mark **Journal Order = Journal Type** ❷ 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** ❸ option *(see example below)*

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

Step ❷: Select an Output Format

Nominate the file format in which the report is required.

- **Standard Format (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
- **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™

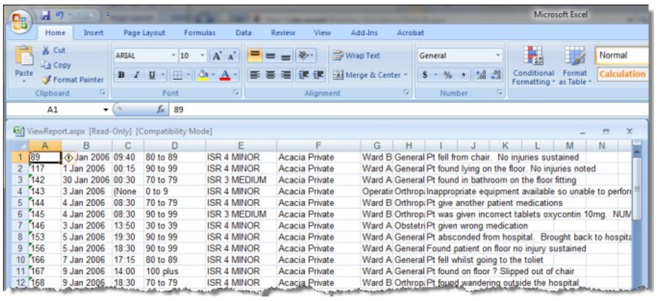
  ***Note**: All output formats above where the report is an aggregate report, with the exception of Excel Workbook (XLS Data Only) and (XLS Grid Format), can produce an attached chart at the end of each report (where applicable). Excel™ simply creates a data export in flat (one row per feedback record) 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)

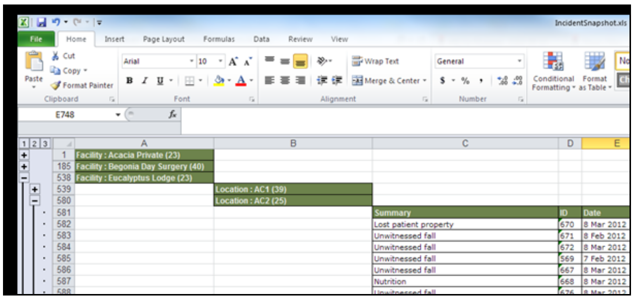
The **XLS Data Only** option will put your data into a 'flat' format (i.e. 1 row per record). You will need to create a **Layout** specifically for exporting your desired data.



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™

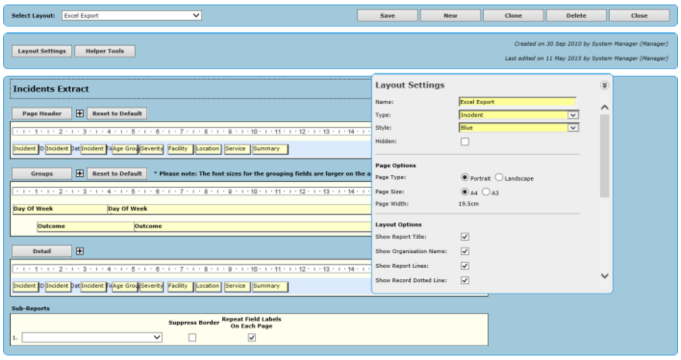
- Report Title & Organisation Title
- **Layout Options** & **Colour schemes** from the Report Settings
- Page Headers
- Charts

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"

***Note:** The field width and gaps between fields are ignored when exporting to Excel. Each field will have its own cell in the spreadsheet and there will be no empty cells*



***Example:** Incident Report configured to output to Excel™*

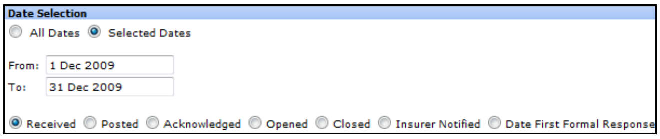
Step ❸: Select a Date Period to Review

The next step is to define the **date period** to which this report applies.

- 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. Then enter the **[From]** and **[To]** dates to define the period over which the report will be run.

If dates are specified, the date period can be based on

- **[⦿ Received Date]** – Date you received or were notified of the Feedback. This relates to the “Date Received” field
- **[⦿ Posted]** – Date when the feedback notification was reviewed and accepted (posted)
- **[⦿ Acknowledged]** – Date that appears in the “Date Acknowledged” field. This may be the date when the Manager or Consumer Advocate first contacted the complainant or consumer
- **[⦿ Opened]** – Date that appears in the “Opened On” field. This may be the date when the “case” was started
- **[⦿ Closed]** – This is the date when the overall feedback has been closed (all complaints and enquiries need to be closed before the feedback notification can be closed). The closed date will appear in the Date Closed field in the “Dates and Times” section of the Feedback notification
- **[⦿ Insurer Notified]** – Not used in RiskMan
- **[⦿ Date First Formal Response]** – Date that appears in the “Date First Formal Response” field



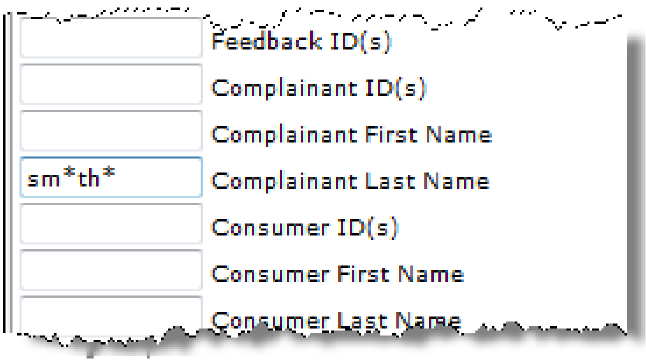
Step ❹: Apply Standard Report Filtering

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

List Fields: If the field is a list field e.g. Site, Location, Program, 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.

Text/Numeric fields: If the field is a text/numeric field e.g. Feedback ID(s), Complainant First Name, Complainant Surname enter the details into the field.

- **Feedback ID(s)** – If entering more than one ID separate the IDs with a comma e.g. 34,57
- **Name fields** – The wildcard **“*”** can be used in these fields to denote other non-specific text e.g. If **sm*th*** is entered into the **Complainant Surname** field then the report will search for all feedback where the Complainant/Author has a surname like **“smith”** or **“smythe”** where any letter can be substituted for the *



***Note:** The Complaint ID(s) and Consumer ID(s) fields are not used*

Selecting more than one filter criteria

If selecting more than one item in the same field the search is done on an **“OR”** basis e.g. “Program = Emergency” **OR** “Program = General Medicine”

If selecting criteria from more than one field, then the filter is based on an **“AND”** basis e.g. Report will only show feedback notifications where (“Program = General Medicine” **OR** “Program = Emergency”) **AND** (“Type of Feedback = Complaint” **OR** “Type of Feedback” = “Suggestion”)

By Custom Selection

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

- That you would like to use regularly; or

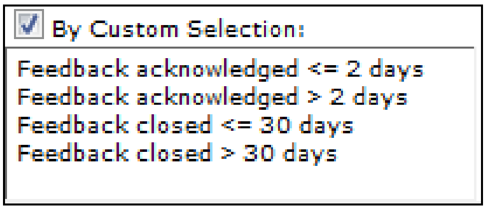
- You are unsure how to use the Advanced Filters; or
- You are unable to create a Standard or Advanced filter

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



Example: Custom selections that cannot be re-produced under the Standard or Advanced Filtering

Consolidate Linked Feedback

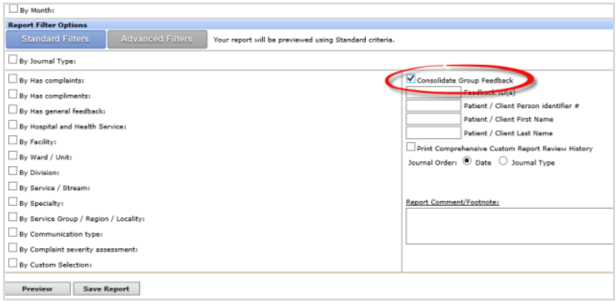
If checked, then feedback notifications that are linked *(for example same complaints from different members of the same family; a complaint and a compliment received from the same person)* will be classed as one feedback notification in the total count. The master notification for the selected date range will become the main feedback record for the report with an optional sub-list of linked feedback appearing underneath

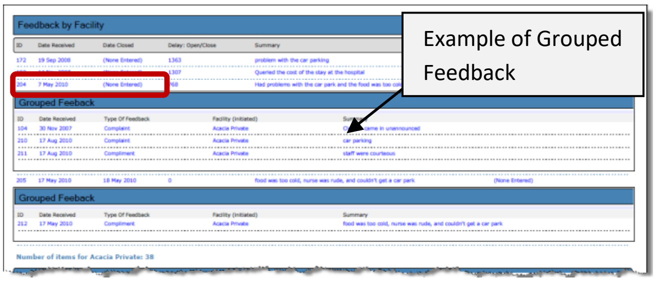
If unchecked, each feedback notification entered within a link will be counted as a separate feedback notification and will appear so on the report

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

To consolidate your linked feedback

1. Select your report from the **Select Layout** page
2. Check the **Consolidate Linked Feedback** option on the Feedback Reports page *(as per example below)*
3. Press **Preview** *(see example below)*



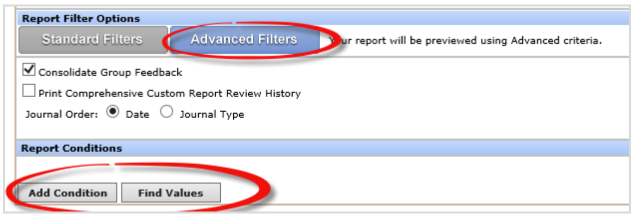


***Example:** Feedback Report showing the Master and Child Notifications of a Grouped Feedback*

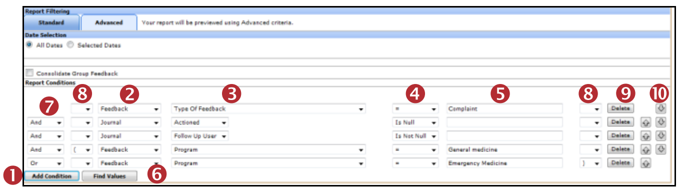
Step ❺: Apply Advanced Report Filtering

Advanced Filtering which is available under the **Advanced** tab, allows 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 ❼ 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 where on the Feedback notification the field is displayed ❷

Actions: Not Used

Consumer: Not Used

Complainant: Not Used

Issue: Not Used

Feedback: All fields that are displayed on the main Feedback Entry page

Journal: All fields displayed in the Journal pop-up window

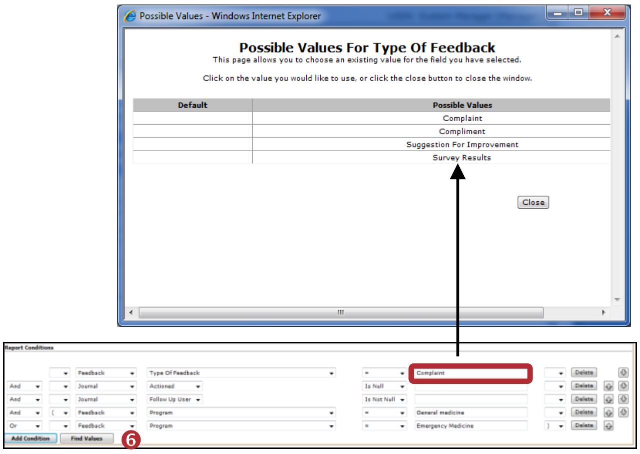
3. Select a field from the list of available fields ❸

4. Select a logical test ❹

   - **For List & Classification selector fields use** =, <> (not equals), Is Null (empty), Is not null (not empty), Like, Not Like
   - **For Date or Numeric fields use** =, <>, >, >=, <, <=, Is Null, Is Not Null
   - **For Text fields use** Is Null, Is Not Null, Like, Not Like

5. Enter or select the criteria for the filter ❺

   - **Text fields:** Enter the text. Wildcards **"%"** can be used e.g. **Summary like %rude%** which means the word "rude" must appear somewhere in the "Summary" field
   - **Date fields:** Enter the date as **1 Jan 2010**
   - **Numeric fields**: Enter the number e.g. 4, 50
   - **List fields:** Press the **Find Values** ❻ button and select **ONE** value from the list (this ensures the correct criterion is selected)



6. 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 again

7. If 2 or more conditions are added to your filter, select **"And"** or **"Or"** ❼ 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. "Type of Feedback = Complaint" **And** "Program = General Medicine", then both conditions must be met before the feedback notification is included in the report

   When to use "Or": When at least one condition must be met e.g. "Program = General Medicine" **Or** "Program = General Surgery", then only one of the conditions must be met before the feedback notification is included in the report

   ***Note: "But Not"** is NOT used in Feedback*

8. If required add **Brackets** ❽ 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 example there are 2 distinct conditions - Type of Feedback and facility. One of those conditions, Facility, has 2 options. The brackets therefore go around the Facility fields*

9. If you wish to delete a condition press the **Delete** ❾ button next to the condition. You may need to modify your **"Or"** and **"And"** options and your **brackets**

10. If you wish to re-order your condition statements use the **Directional** ❿ buttons - **Up** or **Down** next to the respective condition. You may need to modify your **"Or"** and **"And"** options and your **brackets**

Additional Feedback fields available for filtering

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

- **Feedback Day Name:** Can be used to filter your report by particular days of the week e.g. complaints received over the for weekend - Saturday & Sunday
- **Is Linked Feedback:** Can be used to only show Feedback notification that are included in a link only notification
- **Is Master Feedback:** Can be used to only show the Master (i.e. source) report in a group only notification
- **Has been posted:** Not relevant in Feedback Reports because the notifications in the reports must be Posted
- **Sequence (Posted Only):** This field represents the number of times the posted version of the feedback notification has been posted. For example if Sequence = 1 then you are wanting to report on the first time the feedback is posted
- **Sequence No:** Not relevant in Feedback Reports because the notifications in the reports must be Posted

Step ❻: Preview Report

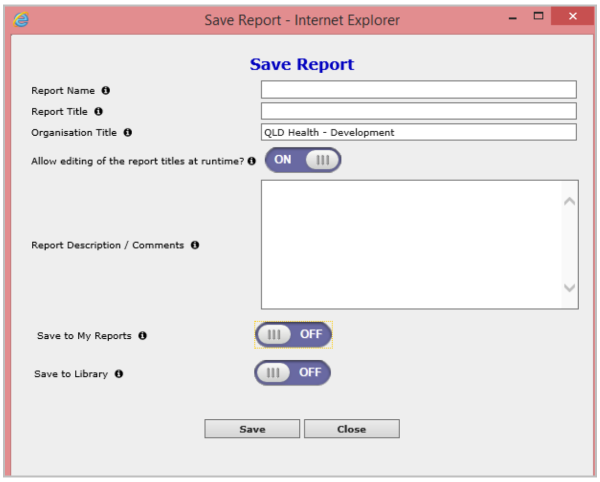
Click the **[Preview]** button to display an onscreen preview of the selected report.

Step ❼: Save Report

The selected report, date selection type and filter criteria can be saved to your **"My Reports"** page. 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™ or Excel™. Users with suitable permissions can then share their saved reports to selected users or templates

To save a report

1. Select a report from the **Select Layout** list
2. Select the **date type** that will be used e.g. Received Date
3. Select a Standard filter or create your filter under the Advanced tab
4. Press **Save Report**



***Example:** Saving a Report to your "My Reports" page*

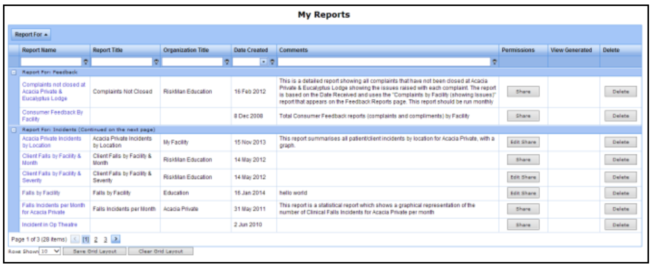
- **Required:** Enter the **Report Name** - this will appear in the list of reports on your **My Reports** page
- **Required:** Enter the title of your report in the **Report Title** field. This title will appear at the top of every page in the report
- **Optional:** Change the **Organisation Title** 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 **Save Report Definition** 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. Save to My Reports – MyReports is the page where all your personal reports will sit. It will include reports that you have saved or reports that have been shared to you. If you want this report to appear on your personal reports page, select 'on' here.
6. Save to Library – The Report Library allows you to save a report in a central location that others can access if necessary. For more information on the Report Library see 'RiskMan quick reference guide to Reports Library Version 1'. If you want your report to appear in the Report Library select 'on' here. NOTE: Saving to the Report Library is a permission so some users will not see this option

My Reports

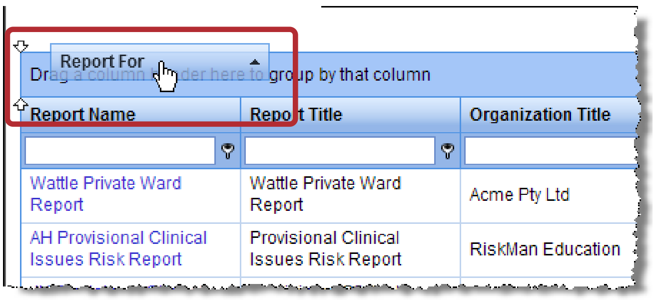
Reports that you have saved from your Feedback Reports page or reports that you have access to view that have been shared to you, can be accessed from your **"My Reports"** page under the **"Reports"** menu option

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 or Quality Activity Reports*



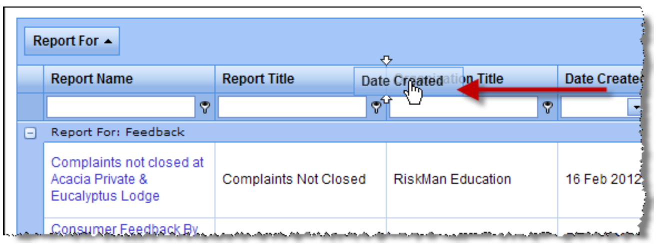
To group your list of Reports

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**



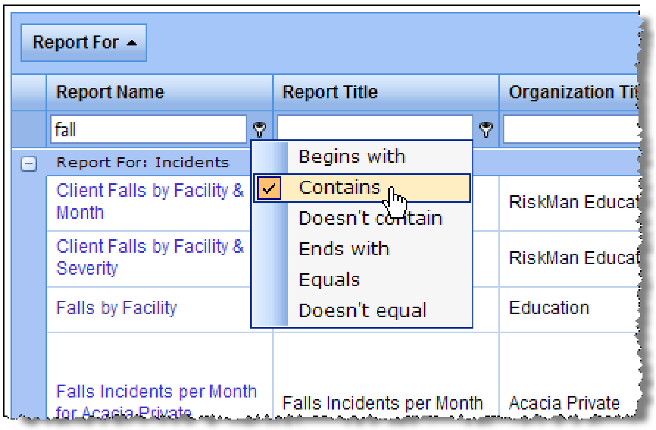
To change the order of the columns in your report grid

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)

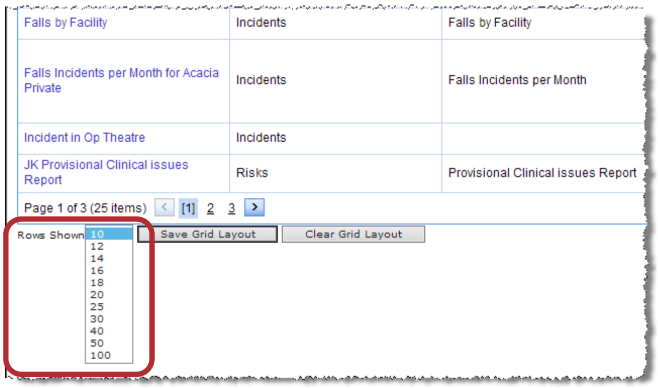


3. It is possible to apply filters to multiple columns
4. To remove a filter, simply delete the criteria (e.g. *fall* in the above example)

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

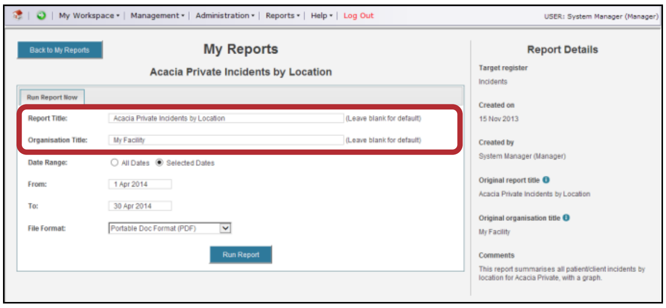
1. The default number of reports displayed on your My Reports page can be modified by selecting from the **Rows Shown** list
2. If there are more reports than displayed on your My Reports page, you will have the option to scroll to view more reports



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 a 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

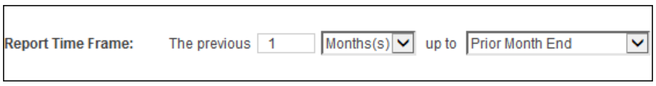
1. Click on the **Report Name** in the My Reports list

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

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

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



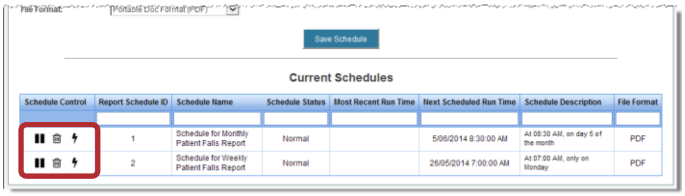
6. Determine how often you would like the report to generate in the **Run Frequency** field e.g. Every **Month** on the **5th** at **8:30am**

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:



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

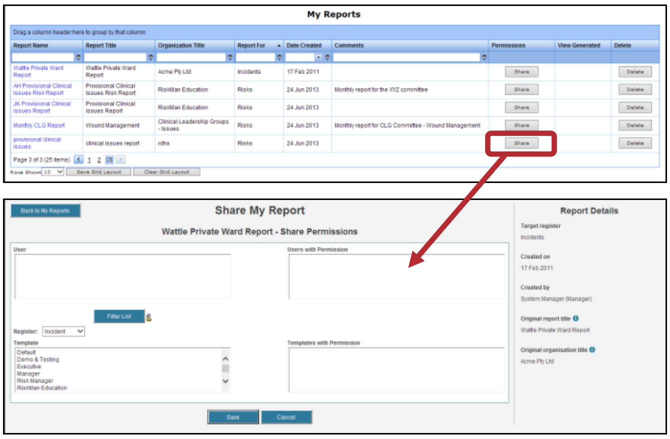
To share or edit a shared report

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 a 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

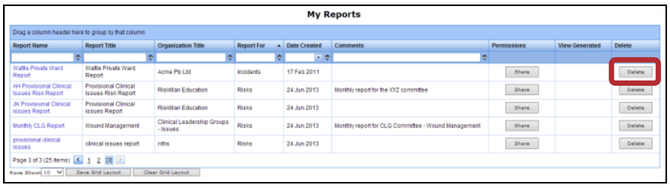


To delete a My Report

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 and also on any other user's "My Reports" list if you have shared that report to them



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:

Field masking Global Setting on: