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*

Layout Choice	6
Select Layout: GCHHS - By Specialty Custom	ise Layout
Report Type	2
○ Standard Format (RPT) ● Portable Doc Format (PDF) ○ Word Document (DDC)	🔿 Excel Workbook (XLS) 🔿 Excel Workbook (XLS Data Only) 🔿 Excel Workbook (XLS Grid Format) 🔿 Rich Text Format (RTF)
Date Selection	Time Selection
All Dates Selected Dates	All Times O Selected Times
Where Date received V	
is from 1 Mar 2017 To 31 Mar 2017	
By Months	
Report Filter Options	
Standard Filters Advanced Filters. Your report will be preview	ed using Diandard criteria.
By Journal Type:	
By Has complaints: 4	Consolidate Group Feedback
By Has complements:	Feedback ID(s)
Dy Has general feedback:	Patient / Chent Person identifier #
By Hospital and Health Services	Patient / Client First Name
By Facility:	Patient / Client Last Name
By Ward / Units	
By Division:	Report Comment/Footnotes
By Service / Stream:	
By Specialty:	
By Service Group / Region / Locality:	
By Communication type:	
By Complaint severity assessment:	
Dy Custom Selection:	

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 **1**: 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

Layout Choice Select Layout: Comprehensive Custom Report	Customise Layout
Report Type	
Standard Format (RPT) Portable Doc Format (PDF) Word Document	t (DOC) 🔿 Excel Workbook (XLS) 🔿 Excel Workbook (XLS Data Only) 🔿 Rich Text Format (RTF)
Date Selection	Time Selection
○ All Dates ● Selected Dates	All Times O Selected Times
Where Date received V is from 1 Mar 2017 to 31. Mar 2017 Br Monthi 0 31. Mar 2017 0	
Report Filter Options	
Standard Filters Advanced Filters Your report will be	previewed using Standard criteria.
By Journal Type:	
y Yes completes by rise completes by rise completes y rise spaced factorize y rised and table Service y rised/yr y rised/yr y rised/yr y rised/yr y rised/yr by rised/yr	Consolidate Group Feedback Fee
By Service Group / Region / Locality:	
By Communication type:	
By Complaint severity assessment:	
By Custom Selection:	

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

- Check mark the Journal Order = Date

 if the Journals are to appear in Date Entered order (see example below)
- Check mark Journal Order = Journal Type ⁽²⁾ 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

 Check mark the Print Comprehensive Custom Report Review History ⁽⁶⁾ option (see example below)

6. Journals					
Date	a 18 May 2010	Time	09:55		
Тур	Action Required	Reference		Amount	
Follow Up Use	r Brett	Follow Up Date	25 May 2010	Actioned Yes	
Description	Please contact John to	dicuss the issue with the car par	king		
	Created by System Ma	nager (Manager) on 17 Aug 201	0 15:50		
Date	a 18 May 2010	Time	09:56		
Тур	Correspondence Received	Reference			
Date Received	8	Received From	18/5/10		
Follow Up Use	r	Follow Up Date		Actioned Yes	
Description	See letter attached				
		nager (Manager) on 17 Aug 201	0 15:50		
		nager (Manager) on 17 Aug 201	0 15:50		
Description		nager (Manager) on 17 Aug 201	0 15:50		
7. Documents	Created by System Ma	nager (Manager) on 17 Aug 201	0 15:50		
7. Documents teview History	Created by System Ma	nager (Manager) on 17 Aug 201	0 15:50	Delegate For	
7. Documents teview History Date	Created by System Ma No Records	nager (Manager) on 17 Aug 201 Manager (Manager)		<u>Delogate For</u>	
	Created by System Ma No Records <u>User</u> System		Notes	<u>Deleaste For</u>	
7. Documents teview History Date 17 Aug 2010 15:50	Created by System Ma No Records <u>User</u> System Feedba	Manager (Manager)	Notes Created the feedback. Feedback Administrator Email NOT	Doleaate For	
7. Documents teview History Date 17 Aug 2010 15:50 17 Aug 2010 15:50	Created by System Ma No Records <u>User</u> System Feedba	Manager (Manager) ok Administrator	Notes Created the feedback. Feedback Administrator Email NOT SENT.	Reteasts For	

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

Step 2: 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 <u>will not</u> 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, <u>with the exception of Excel Workbook (XLS</u> <u>Data Only) and (XLS Grid Format)</u>, 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.

Но	me Insert	Page	Layout For	mulas Data I	Review View A	Add-Ins Acro	bat		
		ARIAL	- 10	· A * = =	= »·· 🗟 w	rap Text	General *	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Normal
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Clipbo	ward Gr		Font		Alignment		Number		
AI	· •	(2)	fx 89						
ViewRep			Compatibility M		F	GH		K I M	N
	В	C	D	E	F	G H		K I M	N
1 89	🕭 Jan 2006	09:40	80 to 89	ISR 4 MINOR	Acacia Private	Ward B Gen	eral Pt fell from chair. I	to injuries sustained	
2 117	1 Jan 2006	00:15	90 to 99	ISR 4 MINOR	Acacia Private	Ward A Gen	eral Pt found lying on th	e floor. No injuries note	d
3 142	30 Jan 2006	00:30	70 to 79	ISR 3 MEDIUM	Acacia Private	Ward A Gen	eral Pt found in bathroo	m on the floor fitting	
		(None	0 to 9	ISR 4 MINOR	Acacia Private	Operatir Orth	rop: Inappropriate equip	ment available so unabl	e to perfor
4 143	3 Jan 2006								
4 143 5 144	3 Jan 2006 4 Jan 2006	08:30	70 to 79	ISR 4 MINOR	Acacia Private	Ward B Orth	rop. Pt give another pati	ent medications	
	4 Jan 2006	08:30 08:30	70 to 79 90 to 99	ISR 4 MINOR ISR 3 MEDIUM	Acacia Private Acacia Private			ent medications ect tablets oxycontin 10	mg. NUN
5 144	4 Jan 2006					Ward B Orth		ect tablets oxycontin 10	Dmg. NUM
5 144 6 145	4 Jan 2006 4 Jan 2006	08:30	90 to 99	ISR 3 MEDIUM	Acacia Private	Ward B Orth Ward A Obst	rop: Pt was given incorr tetri Pt given wrong med	ect tablets oxycontin 10	
5 144 6 145 7 146	4 Jan 2006 4 Jan 2006 3 Jan 2006	08:30 13:50	90 to 99 30 to 39	ISR 3 MEDIUM ISR 4 MINOR	Acacia Private Acacia Private	Ward B Orth Ward A Obst Ward A Gen	rop: Pt was given incorr tetri Pt given wrong med	ect tablets oxycontin 1 lication hospital. Brought back	
5 144 6 145 7 146 8 153	4 Jan 2006 4 Jan 2006 3 Jan 2006 5 Jan 2006	08:30 13:50 19:30	90 to 99 30 to 39 90 to 99	ISR 3 MEDIUM ISR 4 MINOR ISR 4 MINOR	Acacia Private Acacia Private Acacia Private	Ward B Orth Ward A Obst Ward A Gen Ward A Gen	ropi Pt was given incorr letri Pt given wrong med eral Pt absconded from	ect tablets oxycontin 1 lication hospital. Brought back for no injury sustained	
5 144 6 145 7 146 8 153 9 156	4 Jan 2006 4 Jan 2006 3 Jan 2006 5 Jan 2006 5 Jan 2006	08:30 13:50 19:30 18:30	90 to 99 30 to 39 90 to 99 90 to 99	ISR 3 MEDIUM ISR 4 MINOR ISR 4 MINOR ISR 4 MINOR	Acacia Private Acacia Private Acacia Private Acacia Private	Ward B Orth Ward A Obst Ward A Gen Ward A Gen Ward A Gen	rop Pt was given incorr letri Pt given wrong med eral Pt absconded from eral Found patient on file	ect tablets oxycontin 10 lication hospital. Brought back for no injury sustained to the toliet	

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 <u>existing layouts</u>, and will export your data with the grouping used in the layout, and <u>will</u> 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 <u>will not</u> 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
- 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"

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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

Select Layout: Excel Expert	Save	New	Clea	ne Del	iete	Close
Layout Settings Helper Tools				Created on 30 Sep 20. 1 edited on 12 May 20.		
Incidents Extract	Layout Se	ttings			۲	
Page Header	Name: Type:		al Export		ī ^	
	Style: Hidden:	60		V	Ĩ	
Incident D Incident Patincident Tillage Groad Severity Facility (Location) Service (Summary						
Groups 🗄 Reset to Default * Please note: The first sizes for the grouping fields are larger on t	Page Options Page Type:		Portrait O Lan	fscape		
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Dutcome Dutcome	Layout Option					
Detail	Show Report T Show Organisa	LL				
		Li.			~	
Incident D Incident Pat Incident Figure Groad Service Service Summary	Show Record E	otted Line: 🔽				
Sub-Reports Suppress Border Repeat Field Labels On Fach Page			_			
Suppress Borber On Each Page						

Example: Incident Report configured to output to Excel™

Step 6: 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
 [O All Dates] option.
- To run the report over a specific period, click the
 [O 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

- [③ Received Date] Date you received or were notified of the Feedback. This relates to the "Date Received" field
- [O Posted] Date when the feedback notification was reviewed and accepted (posted)
- [O 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
- [O Opened] Date that appears in the "Opened On" field. This may be the date when the "case" was started
- [O 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
- [O Insurer Notified] Not used in RiskMan
- [O Date First Formal Response] Date that appears in the "Date First Formal Response" field

te S	election			
AI	l Dates 💿 Selected Da	tes		
om:	1 Dec 2009			
	31 Dec 2009			

🖲 Received 🔘 Posted 🔘 Acknowledged 🔘 Opened 🔘 Closed 🔘 Insurer Notified 🔘 Date First Formal Response

Step 4: 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 *

	Feedback ID(s)
	Complainant ID(s)
	Complainant First Name
sm*th*	Complainant Last Name
	Consumer ID(s)
	Consumer First Name
- Anna -	Consumer Last Name

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

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- 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 <u>support@riskman.net.au</u>

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

By Custom Selection:

Feedback acknowledged <= 2 days Feedback acknowledged > 2 days Feedback closed <= 30 days Feedback closed > 30 days

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

Consolidate Linked Feedback

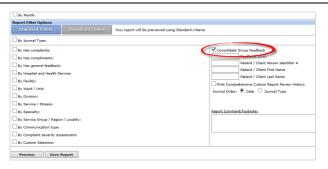
If checked, then feedback notifications that are linked (for example same complaints from different members of the same family; a complaint and a compliment received from the same person) will be classed as one feedback notification in the total count. The master notification for the selected date range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

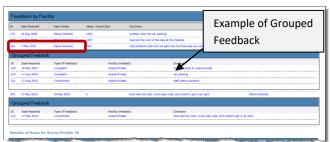
If unchecked, each feedback notification entered within a link will be counted as a separate feedback notification and will appear so on the report

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 5: 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 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)

Standard Filters 🤇	Advanced Filters	Dur report will be previewed using Advanced criteria.
Consolidate Group Feedbac	k	
Print Comprehensive Custo	m Report Review History	
Journal Order: Date	Journal Type	
lournal Order: 🖲 Date 🔾	Journal Type	
Journal Order: Date	Journal Type	

Create a filter

Standard		Advanced Yo	ur repo	rt will be previewed using Advanced criteria.							
ate Selection											
All Dates	D Select	ted Dates									
Consolidate		eedback									
eport Conditio		-		-		-			-	0	
-	8	2		3		(4)		(5)	8	- (9)	
7		Feedback		Type Of Feedback	-			Complaint		Delete	
	-	Feedback Journal	•	Type Of Feedback Actioned	•	# Es Null	•	Complaint		_	ŵ
And -					-		•	Complaint		Delete	
And •	•	Journal	•	Actioned •	•	Es Null	•	Complaint General medicine		Delete Delete	() () () ()

- 1. Press Add Condition **0**
- Select where on the Feedback notification the field is displayed

Actions: Not Used

Consumer: Not Used

Complainant: Not Used

Issue: Not Used

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

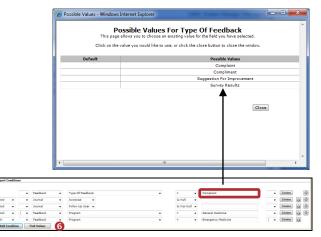
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Journal: All fields displayed in the Journal pop-up window

- 3. Select a field from the list of available fields 69
- 4. Select a logical test 4

skman

- 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 =, <>, >, >=, <, <=, ls Null, ls Not Null
- For Text fields use Is Null, Is Not Null, Like, Not Like
- 5. Enter or select the criteria for the filter **9**
 - 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 ③ button and select ONE value from the list (this ensures the correct criterion is selected)



- 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 1 again

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

 If required add Brackets ③ 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

			٠	Feedback	•	Type Of Feedback	•	-	-	Complaint	✓ Delete
And	-	(•	Feedback	-	Facility	•	-	-	Acacia Private	→ Delete 🔂 🔇
Or				Feedback		Facility		=		Eucalyptus Lodge	Delete 🔂

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

- If you wish to delete a condition press the Delete O 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** 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 6: Preview Report

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

Step 🕖: 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

Ø	Save Report - Internet Explorer	-	×
	Save Report		
Report Name			
Report Title 0			
Organisation Title 0	QLD Health - Development		
Allow editing of the report titles at	runtime? 🛛 ON 💷		
Report Description / Comments 🛛	,		
Save to My Reports O Save to Library O			
	Save Close		



- 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
- 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

Report Name	Report Title	Organization Title	Date Created	Comments	Permissions	View Generated	Delete
\$	♥	2	• •	0			
Leport For: Peedback							
Complaints not closed at Acacia Private & Eucalyptus Lodge	Complaints Not Closed	Riskfilan Education	16 Feb 2012	This is a detailed report showing all complaints that have not been closed all Acada Physite & Euclyptus Lodge showing the issues raised with each complaint. The report is based on the Date Received and uses the "Complaints by Facility (showing)" report that appears on the Feedback Reports page. This report should be run monthly	Share		Celet
Consumer Feedback By Facility			8 Dec 2008	Total Consumer Feedback reports (complaints and compliments) by Facility	Share		Delet
Report For: Incidents (Con							
Acacia Private Incidents by Location	Acacia Private Incidents by Location	My Facility	15 Nov 2013	This report summarises all patient/client incidents by location for Acada Private, with a graph.	Edit Share		Delet
Client Fails by Facility & North	Client Falls by Facility & Month	Riskfilan Education	14 May 2012		Share		Delet
Client Falls by Facility & Seventy	Client Falls by Facility & Severity	Riskfilan Education	14 May 2012		Edit Share		Delet
Falls by Facility	Fails by Facility	Education	16.Jan 2014	helio world	Edit Share		Delet
Falls Incidents per Month for Acada Privale	Falls incidents per Month	Acadia Private	31 May 2011	This report is a statistical report which shows a graphical representation of the number of Clinical Falls incidents for Acacia Private per month	Share		Delet
incident in Op Theatre			2 Jun 2010		Share		Delet

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

Drag a column the der here to group by that column							
Report Name	Repo <mark>t</mark> Title	Organization Title					
۲	♥						
Wattle Private Ward Report	Wattle Private Ward Report	Acme Pty Ltd					
AH Provisional Clinical Issues Risk Report	Provisional Clinical Issues Risk Report	RiskMan Education					

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

керс	ort For 🔺		Ł	÷		
Re	eport Name	Report Title	Date	Created tion Titl	e	Date Crea
	٣		Ý		9	
- Re	eport For: Feedback					
Ac	omplaints not closed at cacia Private & ucalyptus Lodge	Complaints Not Close	ed	RiskMan Educati	on	16 Feb 20

To filter the My Reports being displayed

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

R	eport For 🔺				
	Report Name		Report Title		Organization Tit
	fall	Ŷ		9	
Ξ	Report For: Incidents		Begins with		
	Client Falls by Facility & Month		Doesn't contains		RiskMan Educat
	Client Falls by Facility & Severity		Ends with Equals		RiskMan Educat
	Falls by Facility		Doesn't equal		Education
	Falls Incidents per Monti for Acasia Private	h	Falls Incidents per Mon	th	Acacia Private

- 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

- 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

Falls by Facility	Incidents	Falls by Facility	
Falls Incidents per Month for Acacia Private	Incidents	Falls Incidents per Month	
Incident in Op Theatre	Incidents		
JK Provisional Clinical issues Report	Risks	Provisional Clinical issues Repo	
Page 1 of 3 (25 items) < [1] 2 Rows Shown 10 12 14 16			
18 20 25 30 40 50			

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

i.

option to change these titles if required e.g. adding the Month or Quarter at the end of the report title

Back to My Reports	My Reports Acacia Private Incidents by Location	on	Report Details Target register Incidents
Run Report Now			Created on
Report Title: Organisation Title:	Acacla Private Incidents by Location My Facility	(Leave blank for default)	15 Nov 2013 Created by
Date Range: From:	All Dates Selected Dates All Apr 2014		System Manager (Manager) Original report title 0
From: To:	30 Apr 2014		Acacia Private Incidents by Location
File Format:	Portable Doc Format (PDF)		Original organisation title () My Facility
	Run Report		Comments This report summarises all patien/Iclient incident location for Acacia Private, with a graph.

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



 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	
	,							

- 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:

Save Schedule									
					Current	t Schedules			
Sche	dule	Control	Report Schedule ID	Schedule Name	Schedule Status	Most Recent Run Time	Next Scheduled Run Time	Schedule Description	File Form
I	Û	•	1	Schedule for Monthly Patient Falls Report	Normal		5/06/2014 8:30:00 AM	At 08:30 AM, on day 5 of the month	PDF
	Û	4	2	Schedule for Weekly Patient Falls Report	Normal		26/05/2014 7:00:00 AM	At 07:00 AM, only on Monday	PDF

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

- 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

Report Title	Organization Title	Report For A	Date Created	Comments	Permissions	View Generated	Delete
· · · · · · · · · · · · · · · · · · ·							
Wattle Private Ward Report	Acree Pty Ltd	Incidents	17 Feb 2011		Share		Delete
Provisional Clinical Issues Risk Report	Risilian Education	Risks	24 Jun 2013	Monthly report for the XYZ committee	Share		Delete
Provisional Clinical issues Report	Risidian Education	Risks	24 Jun 2013		Share		Delete
Wound Management	Clinical Leadership Groups - Issues	Risks	24 Jun 2013	Monthly report for CLG Committee - Wound Management	Share		Delete
clinical issues report	rdhs	Risks	24 Jun 2013		Share		Delete
1 2 13 2					_		
ave Grid Layout Clea	ar Grid Layout						
	Wattle Private Wa	rd Report -			Incidents		
			Users with Perm	nission	Created on		
					Created by		
						ager (Manager)	
Filme List @						eret title O	
Filter List g					Original rep	ort olle 0	
			Templates with	Permission	Original rep Watte Privat	le Ward Report	
			Templatos with	Permission	Original rep Wattle Pricel Original org	le Ward Report	
	^		Templatos with	Permission	Original rep Watte Privat	le Ward Report	
	î		Templatos with	Permission	Original rep Wattle Pricel Original org	le Ward Report	
	Ĵ		Templatos with	Permission	Original rep Wattle Pricel Original org	le Ward Report	
	Provisional Clinical Issues Rosk Report Provisional Clinical Issues Report Wound Management clinical Issues report 1 2 18 2	Therease a United and Star Rick Root Root Star Rick Root Root United Root Root Star Root Root Star Root Root Root Root Root Root Root Root	Status Raining Rolf an Education Rolf Province Rolf an Education Rolf Province Rolf and Education Rolf Rolf and	Name Refer 24.07.011 Maximum Stratting Refer 24.07.011 Maximum Stratting Refer 24.07.011 Maximum Stratting Refer 24.07.011 Maximum Stratting Refer 24.07.011 1 2 10 10 Refer 24.07.011 1 2 10 10 Refer 24.07.011 Maximum Stratting Refer 24.07.011	Name Revised Feature Revised Feature	Name Distance Review Distance Review Distance Dis	Status Revise 24.0.201 Revise Participation Participation Provide Countier Revise Ecountier Revise Ecountier Participation Partic

To delete a My Report

Note: The deletion of a My Report <u>cannot</u> be undone

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

Drag a column header her									
Report Name	Report Title	Organization Title	Report For	•	Date Created	Comments	Permissions	View Generated	Delete
*		2		Ÿ		0			_
Wattle Private Ward Report	Wattle Private Ward Report	Acme Pty Ltd	Incidents		17 Feb 2011		Share		Celete
AH Provisional Clinical Issues Risk Report	Provisional Clinical Issues Risk Report	Risitian Education	Risks		24 Jun 2013	Monthly report for the XYZ committee	Share		Delete
JK Provisional Clinical Issues Report	Provisional Clinical Issues Report	RisiMan Education	Risks		24 Jun 2013		Share		Delete
Monthly CLG Report	Wound Management	Clinical Leadership Groups - Issues	Risks		24 Jun 2013	Monthly report for CLG Committee - Wound Management	Share		Delete
provisional clinical issues	clinical issues report	rdhs	Risks		24 Jun 2013		Share		Delete
Page 3 of 3 (25 items) 💰	1 2 22 2								

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:

Feedback ID Summary Detail	Feedback status	Summary Complaint severity assessment
7	(None Entered)	Was treated poorly
Was treated poor Patient claims the	ey were treated poorly by nurse	Moderate

Field masking Global Setting on:

Feedback ID Summary	Feedback status	Summary
Detail		Complaint severity assessmen
7 Was treated poor	(None Entered)	Was treated poorly
	ey were treated poorly by nurse	Moderate