# RLDatix™

# - Report Library User Guide -

FOR RISKMAN VERSION 2103

Last reviewed March 2021

# RLDatix™

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## INTRODUCTION

This guide provides you with all the information required to use the Report Library. Please note that although the screenshots used in this guide may not match what is in your system, the techniques and functionality are transferable to any dataset in any module.

## What is the Report Library?

The Report Library is just what you're thinking; a central place in RiskMan where you can browse or search for a report that meets your requirements.

There are many different ways the Library could be setup in your organisation, and the features you can use will also depend on the user permissions that you have. There are 3 levels of permission you could have for any given folder:

- **Read**: Can run reports from the folder, and perhaps create schedules to generate reports automatically.
- **Read/Write**: Same as above, but can also save or modify reports in the folder. Can take a copy of a Library report and save it to one of their My Reports folders. Can delete reports they have created.
- **Read/Write/Maintain**: Same as above, but have full control over subfolders, and can delete any report that they have permission to see.

**If you cannot find a suitable report in the Library**

If you're unable to find a suitable report, you can create one yourself, provided you have the permission to do so. If you don't have the permission to create reports, you will need to request a report be created by an administrator.

## What does the Report Library look like?

To access the Report Library, navigate to *Analysis > Reports*. On the left-hand side, you'll see My Reports; a collection of reports shared with you or created by you. On the right-hand side, you'll see the Report Library, and all the folders in the library that you have permission to work with.
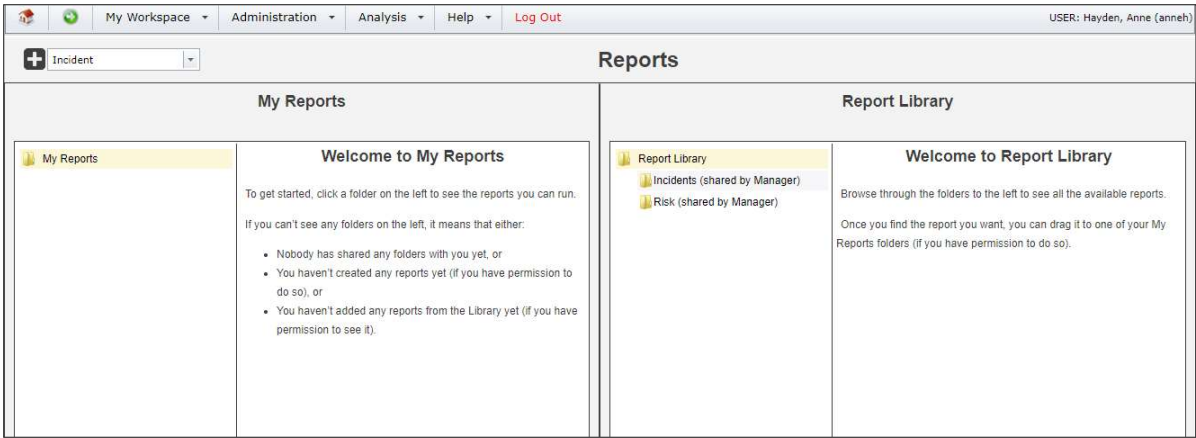
# WORKING WITH REPORTS IN THE LIBRARY

## Finding reports

Sometimes you might browse a folder in the Library containing a large number of reports. Keep in mind that you can search the current folder by typing some search criteria into the search box, shown here:
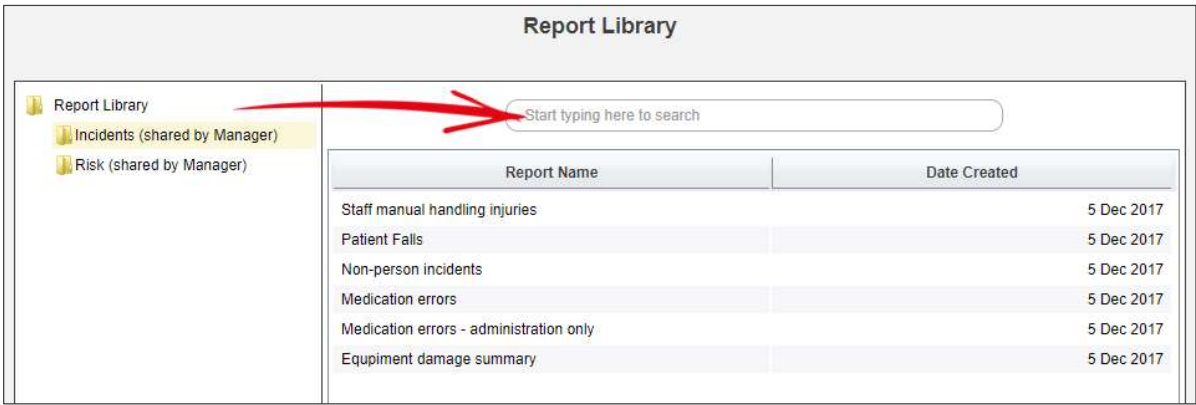


The title, description, and report keywords will be searched, so you have a better chance of finding a suitable report.

# Report actions

When you select a report, the actions you have permission to take will appear as shown:
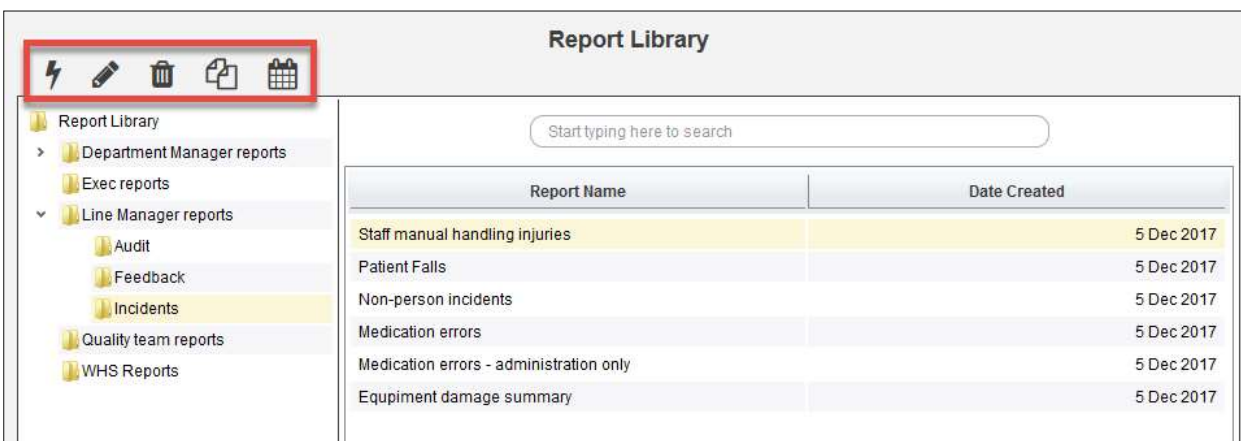


| | RUN | Run the selected report. You'll enter the date and desired format. Everyone can see this action. |
| --- | --- | --- |
| | EDIT | Edit the configuration of this report. You need to have Read/Write permission. |
| | DELETE | Delete the report. You can only delete reports that you created yourself. |
| | CLONE | Makes a copy of this report. You need to have Read/Write permission. |
| | SCHEDULE | Create a schedule to make this report generate automatically. This is a separate permission. |

## ⚡ Run the report

You need **Read Only**, **Read/Write**, or **Read/Write/Maintain** permission to use this function.



❶ Leave the **Report Title** field blank to use the default title (in this example the report title would read "Staff manual handling injuries"), or enter your desired title, e.g. "Staff manual handling injuries – November 2017". Note that some reports don't allow you to modify this title.

❷ Modify the **Organisation Title** if required. Note that some reports don't allow you to modify this title.

❸ Select the **date range** required for this report. The default date range is the last full calendar month. Select All Dates if you don't want any date filtering for your report.

❹ Choose the **file format** in which you want your report generated.

### ✏️ Edit the report

You need **Read/Write** or **Read/Write/Maintain** permission to use this function.

Allows you to edit the configuration of this report. Refer to the **Creating Reports** guide for help with configuring reports.

If you edit a report in the Library, it does not affect copies of it that other users previously saved in their My Reports.

### 🗑️ Delete the report

The only users who can delete a report are:

- The user who originally created the report, and
- Users who have the "Is Library Administrator" user permission

If you delete a report in the Library, it does not delete copies of it that other users previously saved in their My Reports. Deleted reports cannot be recovered, so be sure before you click this.

### 📑 Clone the report

You need **Read/Write** or **Read/Write/Maintain** permission to use this function.

Make a copy of the selected report in this folder. You can then edit that report as required. Refer to the **Creating Reports** guide for help with configuring reports.

### 📅 Schedule the report

Create one or more schedules, so that the report is generated automatically at the time frame you stipulate. This is a separate user permission, and might not be in use in your system. Refer to the **Report Schedules** guide for help with creating report schedules.

## Moving reports

If you have at least **Read/Write** permission to folders, you can perform the following actions:

**Move a report from one Library folder to another**
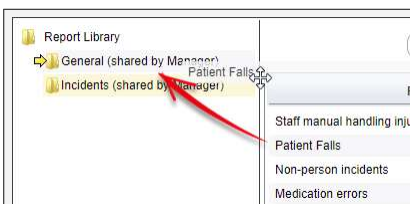


Simply drag a report to another folder to move it.

You must have Read/Write permission to <u>both</u> the source and destination folders to be able to do this.

**Take a copy of a report from the Library and save it in a My Reports folder**

If you have Read/Write permission to a Library folder, you can also take a copy of a report from that folder and save it in a My Reports folder:
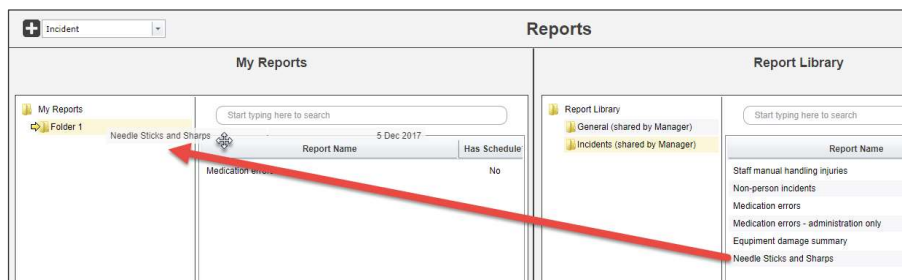


This copy is independent of the source report; you can modify or delete the copy in your My Reports and it will not affect the source report in the Library. Similarly, if the source report in the Library is modified, moved, or deleted, the copy you have in your My Reports remains unaffected by those actions.

## Working with folders

If you have **Read/Write/Maintain** permission to folders, you can perform the following actions:

**Add, rename, or delete a folder**

Right click a folder to see the available options:
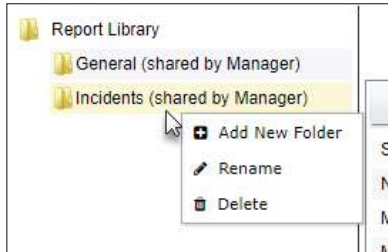


**Add New Folder:** Creates a new folder on the next level. Type the desired folder name and press the **Enter** key on your keyboard.

**Rename**: Change the name of the current folder. Type the desired folder name and press the **Enter** key on your keyboard.

**Delete**: Delete this folder. You cannot delete a folder if it contains any reports or subfolders. Relocate or delete these in order to delete a folder. Deleting cannot be undone.

**Move a folder**



You can drag and drop a folder to another folder to relocate it. You must have the Read/Write/Maintain permission for both the source folder you are moving, and the destination folder you are moving it to.