Introduction

The Report Library V1 is an enhanced version of 'My Reports'. It allows users with permission to save reports centrally, from where other users, also subject to permission, can search for and obtain a copy of a report, kept in their own 'My Reports' list.

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

Enable permission

The System Administrator will be required to allow permission to either options in General Reporting;

1. Add reports from library
2. Edit Library Reports
3. Delete Library Reports

Register specific reporting permission in user templates

Note: Refer to the "User Template" guide for further information on applying template changes

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**

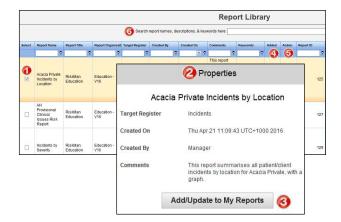*Example: Saving a Report to your "My Reports" page*

- **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:** Check **"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

- **Optional:** To save a report ensure the option **"on"** is selected next to **Save to My Reports** if this report is to become available in the My Reports page.

- **Optional:** To add the report to the Reports Library for other users to view and add to their My Reports list, select **"on"** next to **Save to Library.**

5. Click **Save**

6. Click **Close**

Access the Reports Library

1. *Go to Reports>My Reports*

2. Select the "Add from Library"

All of the Reports that have been added to the Library will display in a grid. Users will be able to "browse" through the Library to select reports that may be of use to them.

1. **Select**: Selects the individual report.

2. **Properties:** When a report has been selected, its properties will present. The property field contains details pf the report such as "**Comments**" The comments are added at the time of saving the report to the Library. These details may be edited (editing permission required).

3. **Add/Update to My Reports:** To add a report to **"My Reports"** from the Library, select **Add/Update to My reports.** If any details of a reports has been edited, user are able to apply those changes by selecting the relevant report and select **Add/Update to My reports**.
Note: Edits to report properties will not automatically update

4. **Added:** If a the box is checked on, this indicates that the report is already present in the users "**My Reports"** list. If the check box has not been selected this indicates that the user does not have this report in their **"My Reports"** list. The checkbox is a read only field and cannot be checked on or off from the Library.

5. **Action:** Depending on the users permission will determine if the user has the ability to edit or

delete reports that have been added to the Library.

If a user has added a report to their **"My Reports"** from the Library and the report is deleted from the library, this will not affect/delete the report in the **"My Reports"** list, it will only be removed from the Library itself. To delete a report from the library, select the 🗑 icon.
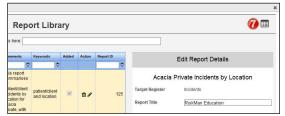
Note: The deletion of a My Report cannot be undone

A user may edit the report properties, depending on the users permission settings. Select the ✏ icon to make chages to the **Report Title, Report Organisation Title, Comments and/or the Keywords.**

Note: If a user has a report saved from the Library, edits will not automatically transfer to the report saved in "My Reports". When there is an edit to the report properties, users will be required to select the relevant report and select "Add/Update to My Reports"

6. Once the reports library grows and becomes more mature, it may become more difficult to find reports that are of use to the user. The search function allows a user to narrow their search down by entering relevent search words in the search field. The search function will read from **Report Name, Comments (description) and Keywords** columns and only display reports matching the search criteria.

7. **Change Columns:** Like all other list pages in RiskMan, users are able to determine what columns present in their library. This will only change the view for the user only and no other users view of the library.