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	
Select Layout: SCHHS - By Specialty Car	fomice Layout
Report Type	2
🔿 Standard Format (RFT) 🛞 Fortable Doc Format (FDF) 🔿 Word Document (F	XCC) 🔿 Duzel Workbook (31.5) 🔿 Duzel Workbook (31.5 Dets Cerly) 🔿 Duzel Workbook (X1.5 Grid Formet) 🔿 Rich Text Formet (RTF)
Date Selection	Time Selection
All Dates	All Times Selected Times
There Date received	
a fram 1 Mar 2012 ta 21 Mar 2017	
By Marith	
Report Filter Options	
Standard Filters Advanced Filters Year report will be pre	neved using Standard orbonia.
By Journal Typer 👝 5	
By Has complaints	Consolidate Group Feedback
By Hat compliments:	Feedback (D(s)
By Has general feedback:	Patient / Client Person identifier #
By Hospital and Health Services	Patient / Chant First Name
by facility:	PREMATY CLARP LINE MARKA
By Ward / Units	
By Division:	Report Comment/Factnate:
By Service / Stream	
By Specialty:	
By Barvica Group / Region / Localitys	
By Communication type:	
By Complaint severity assessment: By Curtom 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

ayout Choice elect Layout: Comprehensive Custom Report V Custon	nise Layout
Report Type Standard Format (RPT) Portable Doc Format (PDF) Word Document (DOC)) O Excel Workbook (XLS) O Excel Workbook (XLS Data Only) O Rich Text Format (RTF)
Date Selection All Dates Where Date mechanism is from [1 Mar 2017 by Monchi	Times Safaction
Report Filter Options Advanced Filters Your report will be preview By Journal Type: Provide the preview Provide the preview	ved using Standard criteria.
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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

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

5. Journals					
Da	te 18 May 2010		Time	09:55	
Ту	e Action Required	R	eference		Amount
Follow Up Us	er Brett	Follow	Up Date	25 May 2010	Actioned Yes
Descripti	n Please contact 3	ohn to dicuss the issue with the	e car parki	ing	
	Created by Syst	em Manager (Manager) on 177	Aug 2010	15:50	
Da	te 18 May 2010		Time	09:56	
Ту	Correspondence Received	R	eference		
Date Receiv		Receiv	ed From	18/5/10	
Follow Up Us	er:	Follow	Up Date		Actioned Yes
Descriptio	n See letter attach Created by Syst	ed em Manager (Manager) on 17 /	Aug 2010	15:50	
Description			Aug 2010	15:50	
			Aug 2010	15:50	
	Created by Syst		Aug 2010	15:50	
7. Documents	Created by Syst			15:50	Defeaate For
7. Documents eview History	Created by Syst	am Manager (Manager) on 17 J			Delogate For
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7. Documents eview History Date 17 Aug 2010 15:50	Created by Syst No Records	rm Manager (Manager) on 17 / Isai Sai ystem Manager (Manager)		<u>Notes</u> Created the feedback. Feedback Administrator Email N	
7. Documents eview History Date 17 Aug 2010 15:50 17 Aug 2010 15:50	Created by System No Records	rm Manager (Manager) on 17 / Sef Sef ystem Manager (Manager) eedback Administrator		<u>Notes</u> Greated the feedback. Feedback Administrator Email N SENT.	

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)

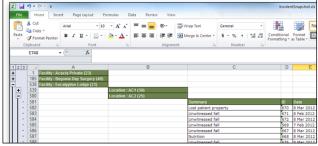
The **XLS Data Only** option will put your data into a 'flat' format (i.e. 1 row per record). You will need to create a **Layout** specifically for exporting your desired data.

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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
- 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

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Sub-Reports					
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Example: Incident Report configured to output to Excel™

Step 8: 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

- [O 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
- [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

Date S	election
All	Dates Selected Dates
From:	1 Dec 2009
To:	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
Land and the second second	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
- 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

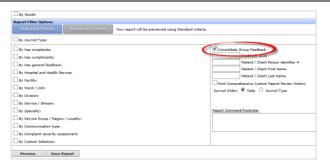
If checked, then feedback notifications that are linked (for example same complaints from different members of the same family; a complaint and a compliment received from the same person) will be classed as one feedback notification in the total count. The master notification for the selected date range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

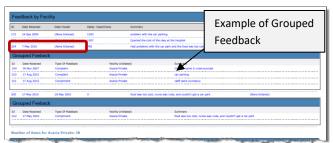
If unchecked, each feedback notification entered within a link will be counted as a separate feedback notification and will appear so on the report

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)



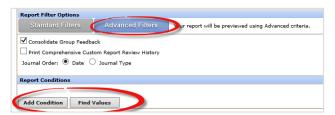


Example: Feedback Report showing the Master and Child Notifications of a Grouped Feedback

Step 6: 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)



Create a filter

Report Fi	Itering											
Stan	dard		Advanced	Your rep	rt will be previewed using Advanced crite	ria.						
Date Sela	ection											
a IIA	2000	🖯 Selec	ted Dates									
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Report Co	enditie	-	-				-			-	-	
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G		U					-					
			Feedback	-	Type Of Feedback	*	-	٠	Complaint	-	Delete	
And	-	-	Journal		Actioned -		15 Null				Delete	6
											Delete	
And	-	-	Journal	-	Follow Up User 👻		Is Not Null			-	Delete	
And		(-	Feedback		Program	-	-		General medicine		Delete	
Or			Feedback		Program				Emergency Medicine		Delete	
Or	Ψ.		Peedback	- Č	Program	*	-	٠	Emergency Medicine) -	Delete	6
Add Co	editio		Find Values	6								

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

Actions: Not Used

Consumer: Not Used

Complainant: Not Used

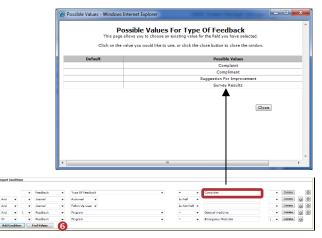
Issue: Not Used

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

CREDATIX RISKMAN REFERENCE GUIDE TO PREVIEWING FEEDBACK REPORTS

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

- 3. Select a field from the list of available fields 6
- 4. Select a logical test 4
 - 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 **S**
 - 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
- 7. If 2 or more conditions are added to your filter, select
 "And" or "Or"

 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

 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

			Ŧ	Feedback	Ŧ	Type Of Feedback	•	-	-	Complaint	👻 Delete 🖏
And	-	C	•	Feedback	-	Facility	-	-	-	Acacia Private	🗸 Delete 🖓 🖏
Or	•		•	Feedback	•	Facility	•	=	-	Eucalyptus Lodge	📔 👻 Delete 🙀
Add Co	Add Condition Find Values										

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
- If you wish to re-order your condition statements use the Directional ⁽⁰⁾ buttons - Up ⁽¹⁾ or Down ⁽¹⁾ 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

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	Save Report
Report Name	
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Organisation Title 0	QLD Health - Development
Allow editing of the report titles at	: runtime? 0 ON III
	_
Report Description / Comments 0	,
	U U U U U U U U U U U U U U U U U U U
Save to My Reports 0	OFF OFF
Save to Library 🚯	OFF
	Save Close

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
- 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	Eate Created	Comments	Permissions	View Generated	Delete
7	2						
Report For: Seedback							
Complaints not dosed at Acadia Privata 8 Eucalyptus Ledge	Complaints Not Closed	Risiblan Education	16 Feb 2012	This is a detailed repert showing all comptaints that have not been closed at Acadis Physica & Bucceptab Lodge showing the issues raised with each comptaint. The report is based on the Date Received and uses the "Comptaints by Pacific (showing issues)" report that appears on the Feedback Reports page. This report should be run monthly	Share		Oales
Censumer Feedback By Facility			8 Dec 2008	Total Consumer Feedback reports (complaints and compliments) by Facility	Share		Dates
	cinued on the next page)						
Acada Privato Incidents by Location	Acada Private incidents by Excetton	W/ Facility		This report summarises all patienticlient incidents by location for Acadia Private, with a graph.	tokt Share		Delete
Client Falls by Facility & North	Client Falls by Facility & North	Risiblan Education	14 May 2012		Ohans		Oalete
Otient Falls by Facility & Deventy	Client Falls by Facility & Bovority	Risiblan Education	14 May 2012		Ddit Share		Delet
Fails by Facility	Fails by Facility	Education	19 Jan 2014	hallo workd	Crit Share		Delet
Fails Incidents per Month for Acadis Pricete	Fails incidents per Month	Acadia Private	31 May 2011	This report is a statistical report which shows a graphical representation of the number of Clinical Fails incidents for Acada Private per month	Drane		Oalet
Incident in Op Theshe			2 Jun 2010		Share		Order

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								
Repo <mark>t Title</mark>	Organization Title							
♥								
Wattle Private Ward Report	Acme Pty Ltd							
Provisional Clinical Issues Risk Report	RiskMan Education							
	Report Title							

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

	Report Name	Report Title	Date	Created ton Title		Date Create
	♥		Ý		Ŷ	
•	Report For: Feedback					
	Complaints not closed at Acacia Private & Eucalyptus Lodge	Complaints Not Close	d	RiskMan Education		16 Feb 201

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)

	Report Name		Report Title		Organization Ti
	fall	Ŷ		9	
-	Report For: Incidents		Begins with		
	Client Falls by Facility &		Contains from		RiskMan Educat
	Month		Doesn't contain		
	Client Falls by Facility &		Ends with		RiskMan Educat
	Severity		Equals		
	Falls by Facility		Doesn't equal		Education
	Falls is side at a set to at				
	Falls Incidents per Mont for Acacia Private	n	Falls Incidents per Mont	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

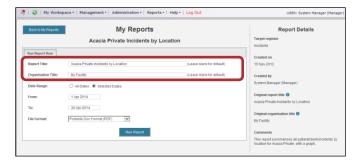
Falls by Facility	Incidents	Falls by Facility
Falls Incidents per Month for Acacia Private	Incidents	Falls Incidents per Month
Incident in Op Theatre	Incidents	
JK Provisional Clinical issues Report	Risks	Provisional Clinical issues Repo
Page 1 of 3 (25 items) < [1] 2		
Rows Shown 10 Save Grid 12 14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

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



- 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
- 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

Report Time Frame: The previous 1 Months(s) v 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 Schedules										
Sci	hedu	le Co	ontrol	Report Schedule ID	Schedule Name	Schedule Status	Most Recent Run Time	Next Scheduled Run Time	Schedule Description	File Form
		ŵ	4	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
		ŵ	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 Name	Report Title	Organization Title	Report For	+ Dete	e Created			missions	View Generated	Delote
				Φ	۲	۰ · · · ·	7			
Adlie Privale Ward lepoit	Wattle Private Ward Report	Acmo Pty Ltd	Incidents	17.5	Feb 2011			Share		Outers
H Provisional Clinical Isues Risk Report	Provisional Official Issues Risk Report	RiskMan Education	Risks	24.J	Jun 2013	Monthly report for the XYZ committee		Share		Delete
CProvisional Clinical sues Report	Provisional Clinical Issues Report	RiskMan Education	Risks	24.3	Jun 2013			Shine.		Delete
loniniy CLG Report	Wound Management	Clinical Leadership Groups - Issues	Risks	24.1	Jun 2013	Monthly report for CLG Committee - Wound Management	_	Share		Delet
rovisional clinical Isues	clinical issues report	rchs	Raska	24.3	Jun 2013		L	Share		Delet
age 0 of 0 (25 items) 👔	<u>1 2 13</u> ≥						7			
no Show 10 V	Save Crid Layout Cie	ar Crid Layout								
Back to By Reports	1	Sha	are My F	Repo	rt	/			Report Deta	nils
Back to My Reports	I	Sha Wattle Private Wa				nissions		Target regi		ilis
	l			t - Shai				Incidents		niis
	l			t - Shai	re Pen				ster	ilis
	l			t - Shai	re Pen			Created on 17 Feb 201	ster	niis
	1			t - Shai	re Pen			Created on 17 Feb 201 Created by	ster	niis
Back to My Reports				t - Shai	re Pen			Created on 17 Feb 201 Created by	ster	niis
lser	Pitter List S			t - Shai	re Pen			Treated on 17 Feb 201 Created by System Rat Original reg	ster 1 lager (Manager) ont title O	ills
lser Register: Indéart	Fitter Last			Use	re Pen	mission		Treated on 17 Feb 201 Created by System Rat Original reg	ster 1 roger (Manager)	lis
Iser Register: Incident Complete				Use	re Pen			Incidents Created on 17 Feb 201 Created by System Illan Original reg Watte Polya	ster 1 lager (Manager) ont title O	lis
lser hogister: Indifort emplate Dafust Dafust Dafust		Wattie Private Wa		Use	re Pen	mission		Incidents Created on 17 Feb 201 Created by System Illan Original reg Watte Polya	ster soper (Kanaper) ont tille O Le Ward Report panisation title O	lis
Iser Ingister: Indiget Gegister: Indiget Default Default Default Frances Hanger		Wattie Private Wa		Use	re Pen	mission		Incidents Created on 17 Feb 201 Created by System IVan Original rep Watte Priva	ster soper (Kanaper) ont tille O Le Ward Report panisation title O	ills
Iser Indiate: Indiart Indiate: Indiart Damo A Teating Financie		Wattie Private Wa		Use	re Pen	mission		Incidents Created on 17 Feb 201 Created by System IVan Original rep Watte Priva	ster soper (Kanaper) ont tille O Le Ward Report panisation title O	ilis

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

↓ RLDatix[™]

leport Name	Report Title	Organization Title	Report For -	 Date Created 	Comments	Permissions	View Generated	Delote
2	7			• • •				
Wattle Private Ward Report	Wattle Private Ward Report	Acmo Pty Ltd	Incidents	17 Feb 2011		Share		Outote
NH Provisional Clinical Issues Risk Report	Provisional Clinical Issues Risk Report	RiskMan Education	Risks	24 Jun 2013	Monthly report for the XY2 committee	Share		Delete
JK Provisional Clinical Issues Report	Provisional Clinical Issues Report	RishMan Education	Risks	24 Jun 2013		Share		Delete
Vorthly CLG Report	Wound Management	Clinical Loadership Groups - Issues	Risks	24 Jun 2013	Nonthly report for CLG Committee - Wound Management	Share		Delete
provisional clinical secure	clinical issues report	rcha	Raska	24 Jun 2013		Share		Dalata

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	Feedback status	Summary
Detail		Complaint severity assessment
7	(None Entered)	Was treated poorly
Was treated poo	rly	
Patient claims th	ey were treated poorly by nurse	Moderate

Field masking Global Setting on:

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