## Introduction

This guide is aimed at Managers/Administrators who are required to create Custom Report Layouts for one or more Registers in RiskMan e.g. Incidents, Feedback, Risk, Quality or any other custom register that you may have included in RiskMan. Examples of custom reports are featured on the following pages
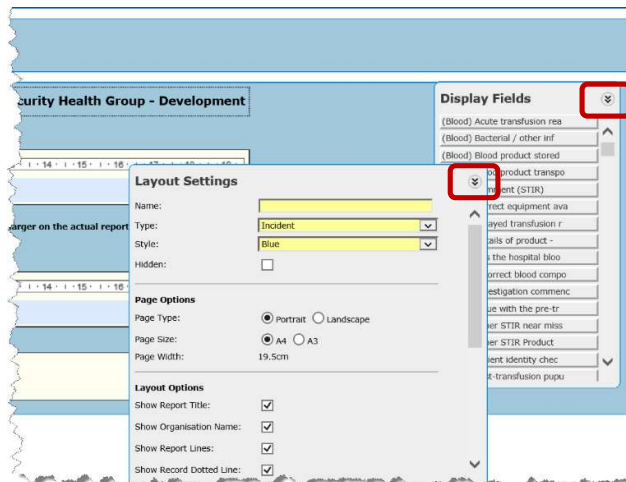
Custom Report Layout Editor

1. To create a custom report layout from a Register Reports page, click on the **Customise Layout** button to open the Custom Report Layout Editor
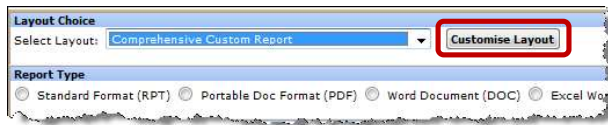
2. In addition, 2 pop-up windows will also display - the **"Layout Settings"** and **"Display Fields"** windows. The latter window will be hidden behind the "Layout Settings" window

    - To **move** the pop-up windows, click your mouse at the top of the window, and drag to desired position
    - To **hide** a pop-up window, click on the respective

       button. Details on how to open these windows, and any other pop-up windows are outlined on the following pages

Example: Incident Custom Report Layout Editor

Viewing an Existing Custom Report Layout

1. Select the report from the **Select Layout** list

    - Both the **Layout Settings** and **Display Fields** *(hidden under the Report Settings)* pop-up windows will also display

- You can hide/move these pop-up windows as required *(refer to example above)*

Modify a Custom Report Layout

Care should be taken when modifying existing reports as they may affect other users in your organisation who may be using this report. An alternative to modifying an existing report is to **Clone** the report and include your modifications
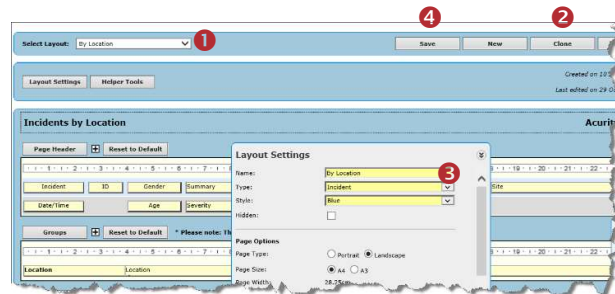
1. Select the report from the **Select Layout** ❶ list
2. Modify the report as required *(refer to details on the following pages)*
3. Press **Save** ❷

Clone a Custom Report Layout

Cloning a Custom Report layout is useful if you like the style of an existing report but you would like to make minor changes

1. Select the report from the **Select Layout** ❶ list
2. Press the **Clone** ❷ button
3. As the **Report Name** ❸ will be cleared from the Report Settings window, enter a new **Report Name** *(you can leave the title the same if it is relevant)*
4. Modify the report as required *(refer to details on the following pages)*
5. Press **Save** ❹

Delete a Custom Report Layout

Care should be taken when deleting a layout. Report layouts **cannot** be recovered, and deleting a layout might break a user's My Report if it can no longer be found.

1. Select the report you with to delete from the **Select Layout** list
2. Press the **Delete** button
3. Press **OK** to the pop-up message *"Are you sure you want to delete this report?"* if you wish to proceed

Example: Incident Report

Example: "By Location (incl Classifications)" from Incidents. This report provides detail on incidents grouped by Location. In addition, there is a sub-report to display the associated Classifications

Example: Feedback Report

❷ In this example the second Report Group heading - Issue Category has been hidden so only the totals are displayed

Example: "Issue Summary Report" from Feedback. This report does not contain any detail and is designed to show the total number of issues raised grouped by Issue Group e.g. Access, Communication

Example: Risk Report

Example: "Risk by Accountable Exec (Actions & Controls)" *from the Risk Register. This report shows all risks grouped by Accountable Executive & Risk Category. In addition there are 2 sub-reports to display the associated Actions and Controls*

Creating a New Report Layout

The numbers on the example below represent the **8 steps** to creating a custom report layout. These steps are described on this and the following pages. These 8 steps can be applied to **all** Register reports
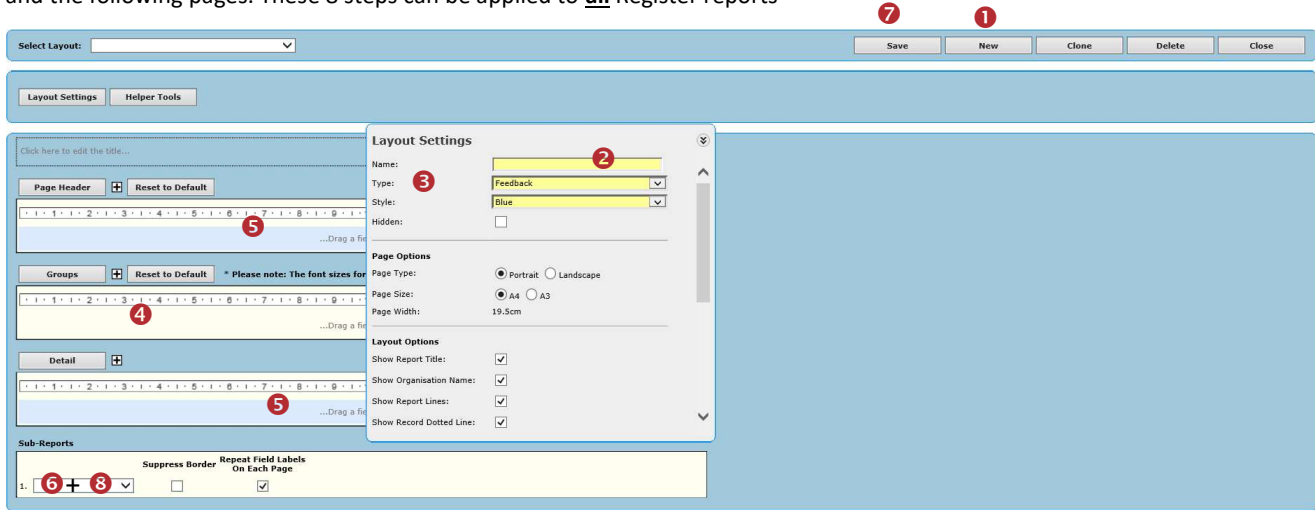
Step ❶: Press New

If you have just opened the Custom Report Layout Builder you can proceed to **Step ❷**

If you have selected a report from the **Select Layout** list to view, press the **New** button to clear the content

Step ❷: Report Title

The **Report Title** is entered directly into the section under the **Layout Settings**

The **Report Title** appears in the top LHS of your Report

To enter a **Report Title**, click inside this section and enter the title
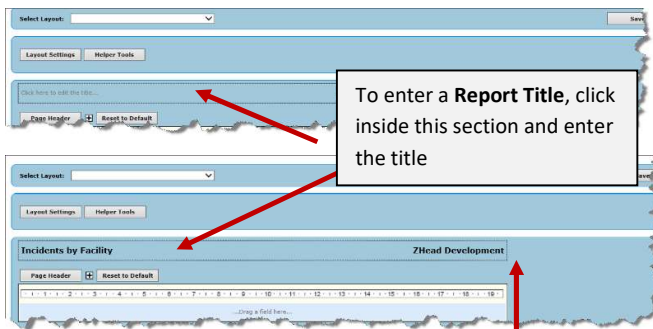
The Organisation title comes from your **Global Settings** and is **displayed/hidden** based on your **Layout Settings** (detailed in **Step ❸**). The Organisation Title can be changed when you save your filters and report layout to your "My Reports" page

Step ❸: Layout Settings

If you have closed the **Layout Settings** pop-up window, click on the **Layout Settings** button

The Layout Settings allow you to

- Specify the name of your report

- Select the type of report you are creating

- Select the Style & Dimensions of the Report

- Specify Site/Region Restrictions placed on this report

Enter or details in the **Layout Settings** pop-up window as described on the next page. These settings will remain when you close this window
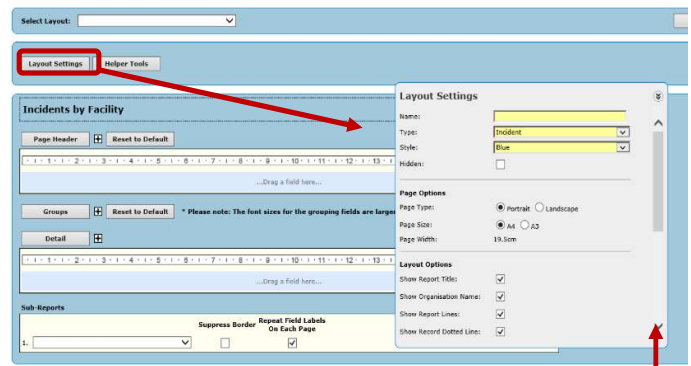
Use the scroll to view more information

Descriptions of the Layout Settings

❶ **Name:** Appears in your **Select Layout** drop down list on the Register Report's page

❷ **Type:** What part of the Register Entry form is the data coming from - includes

Incidents: Incidents, Classifications, Contributing Factors, Associated Risks, Journals, Group Incidents

Risks: Risks, Journals, Associated Incidents, RRControls, RRAction, RRCatalystCauses, RRAssurance, RRConsequences, RRInvestigation

Note: Types commencing with RR relate the sub-form sections on the Risk Entry form

Feedback: Feedback, Issues, Group Feedback, Journals, Actions

Quality: Quality Activities, Classifications, Journals, Associated Risks, Group Quality Activities

Note: If you require Report Types associated with the Recommendations based on the Recommendation Status (similar to that in the Incident Report types e.g. Rec (All), Rec (Accepted), contact https://hub.rldatix.com/SupportHUB/s/

Example: Recommendations on an Incident Entry Form

If you create a report based on one of the following **Report Types** in any Register *(you may have additional ones depending on the setup in your RiskMan system),* then a new option will display called **"Include items that have no <report type name>"**:

- Journals (all Registers)
- Classifications (any Register that uses RiskCat)
- Contributing Factors (Incidents)
- Associated Risks (any Register that allows association to risks)
- Associated Incidents (Risk)
- Associated Activities (Risk)
- Issues (Feedback)
- Actions (Feedback)

How is this option used?

If the report you are creating is a **Parent** report e.g. you are creating a Classification report in Incidents; or an Issues report in Feedback; and the report is not going to be used as a sub-report, then this new option will be adhered to.

If the report you are creating is going to be used a **Sub-Report** then this new option will not be used.

*Example: In this example, a **Contributing Factors Report** has been created to show incidents grouped by their assigned Contributing Factor Group and Severity. It will **only** show those incidents that*

have an assigned Contributing Factor. All other incidents will not be included in the report

Example: In this example, we have used the same Contributing Factors Report but this will also include incidents that have no assigned Contributing Factor

This type of report may be useful if you wish to check that all Incidents that have an Extreme or High severity rating, have at least one Contributing Factor selected

❸ **Style:** Select the colour/style for your report

❹ **Hidden:** If you check Hidden, the report will not be available in the **Select Layout** list on your Register Report page. Check Hidden if the report you are creating is a sub-report and it would not make sense to run the report on its own

Page Options:

❺ **Page Type** & **Page Size**: Is the report to be portrait or landscape and will you be printing on A4 or A3 paper

Note: To use A3 printing, an A3 printer driver needs to be setup on your RiskMan Web Server and you need to be able to print to an A3 printer from your workstation

❻ **Page Width**: This will be determined by the selected Page Type and Page Size

Layout Options - ❼ Refer to the example below:
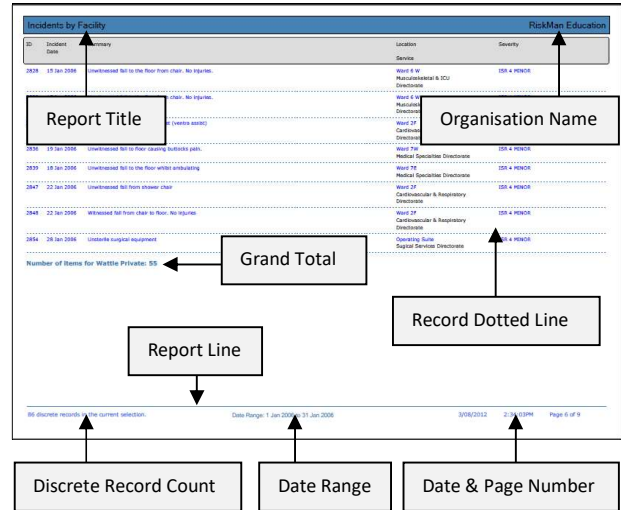
Restrictions

❽ Contains a list of your Sites/Regions based on your User Profile Site/Region Reporting Restrictions. The purpose of this list is to enable you to restrict reports so that only users with matching or higher Site/Region Reporting Restrictions can **view** that report on the specific Register Reports page. If a report has no Site/Region restrictions then it will be available to all users who have access to that Register Reports page

To restrict a report to one or more Sites/ Regions

- Highlight the Sites/Regions in the list *(hold your CTRL button if you wish to highlight more than one item)*

- If the report is to be made available to everyone who has access to the respective Register reports page, **DO NOT** highlight any Sites/Regions

Step ❹: Report Groups

The **Report Groups** section is where you select how you wish the report to be grouped. Grouping your report is optional e.g. you may not want to include any grouping fields if the report is to be used as a sub-report

1. **Add a Report Group Field**

❶ To add a group field, you will need to add a Report Group row, by pressing the **Add** ⊞ button

❷ The **Group Fields** pop-up window showing a list of available fields will also display *(this pop-up window can also be opened by clicking on the **Report Groups** button)*

❸ Find the field in the **Group Fields** list and drag to the **Report Groups** section. To add another Group field, add another row and repeat this step

❹ The **Field Properties** window will display when you select a Group field or when you click on a group field in the

Report Groups section. You will not be able to see all details in this window at once, however, you can use the scroll down bar on the **Field Properties** window to view any additional information ❺
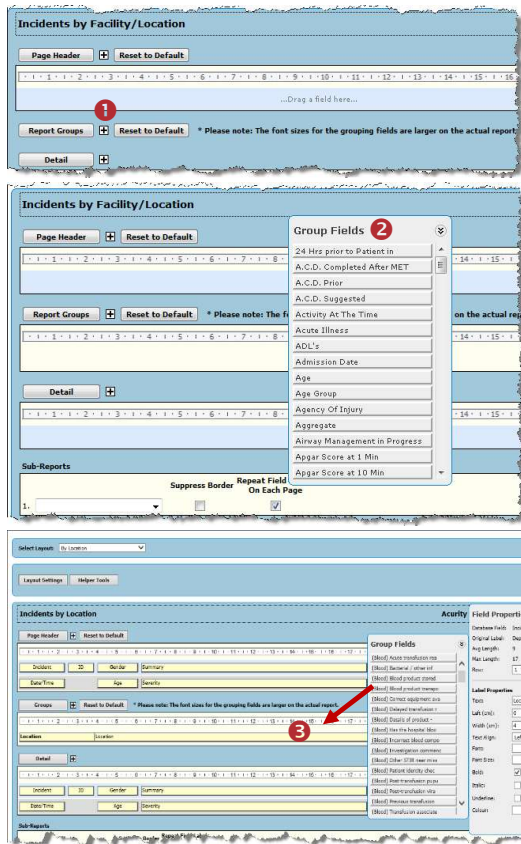
- **Label Left/Width/Alignment:** These fields enable you to change the **Report Grouping label's** position (from the margin), width and alignment e.g. centred, left align
- **Field Left/Width/Alignment:** These fields enable you to change the **content of the Report Grouping's** position (from the margin), width and alignment e.g. centred, left align

❸ Press **Apply**
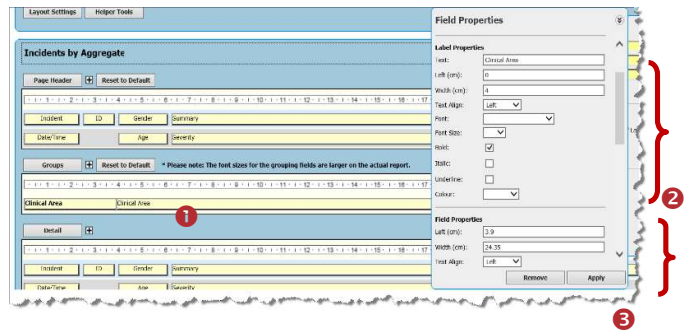
2. Modify the field width or position of a group field on the Report Layout page

❶ To move a field, click on the field and drag to the desired position

Note: You cannot move the field to another row. This must be done via the Field Properties

❷ To change the width of your field, click on the edge *(your cursor will change to ⇔) and* drag to the desired width
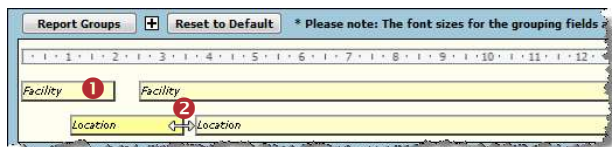
3. Modify the field width or position via the Field Properties

The position and widths of your grouping fields can also be modified via the **Field Properties** of that field

❶ Click on the **Report Group** field to display its **Field Properties**

❷ Modify the following in the **Field Properties** window

4. Move a group field to another row

If you need to move a group field from one row to another, or you wish to insert a new row and move one of your current groupings to another row, this needs to be done via the **Field Properties** window

❶ Click on the field that you wish to move to display its **Field Properties**

❷ Enter the **Row** number

❸ Press **Apply**
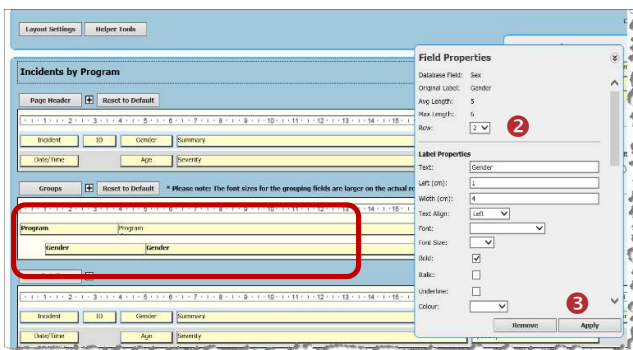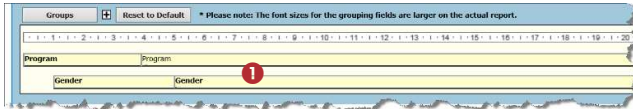
*Note: You <u>cannot</u> drag and drop a field from row to another. If you have a blank row in the middle of the "Report Groups" section (as in the example above), it should be filled, as it will be saved with the report. To fill the row, either add another grouping or move the existing groupings (by changing the **Row** number) so that the blank row becomes the last row in this section. On saving the report the blank rows at the end of this section will be removed*

5. Remove a field

If you need to remove a grouping field, this needs to be done via the **Field Properties** window
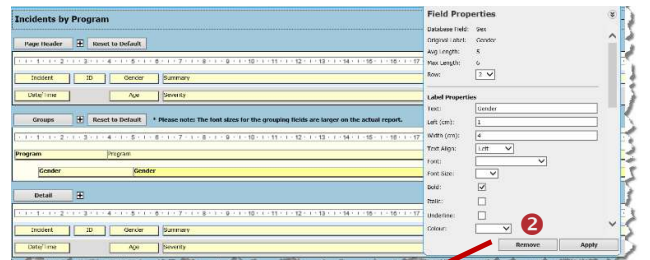
❶ Click on the field that you wish to delete to display its **Field Properties**

❷ Press **Remove**
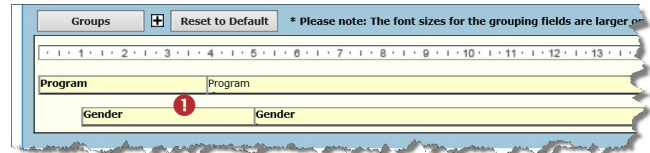
6. Font, style and colour changes

You can change the colour scheme of your report as well as the font size and style in the group fields. Below are a list of ways in which you can change the group aesthetics of your report:

❶ Change the font style, size and colour of the **Label Properties**. This will change the font size and style of the group label heading once the report is generated.

❷ Change the font style, size and colour of the **Field Properties**. This will change the font size and style of the group field heading once the report is generated.

❸ Change the **Group Colour** scheme under **Extended Properties**. Please note that changing the Group Colour may over-ride over colour changes such as individual field or label property font colours or selecting the **Style** in **Layout Settings**.

❹ Press **Apply**

- **Show Total:** Show the total number of records at the end of each grouping

- **Sort Direction:** Sort the content of a grouping in ascending or descending order

- **Hide Group:** Hide the Group heading if you only want to show a total for a grouping (useful for summary reports)

- **Chart Properties:** Select a chart, its position, title and title position/alignment. There are two types of charts available; **standard** charts and **comparison** charts. Standard charts represent only one grouping of data (e.g. location). Comparison charts are used when there are two groups of data (e.g. program and location) and compares the results.

```
Standard
  3D Column
  Bar (Horizontal)
  Bar (Vertical)
  Pie
  Time Line Mth
  Time Line Mth (Data Points)
  Time Line Mth/Yr
  Time Line Mth/Yr (Data Points)
  Time Line Yr
  Time Line Yr (Data Points)
Comparison
  Bar Side By Side
  Stacked Bar
  Stacked Bar (Data Points)
  Line
  Line (Data Points)
  Cross Tab Small
  Cross Tab Large
```


When you select a Time Line chart, the **Date Field** will become a read/write field. Select the date you wish to base the month or year intervals on, on the chart

❶ Click on the respective grouping field to display its **Field Properties**

❷ If you make any changes, press **Apply**

Incidents by Program

Label properties

Field properties

Group colour

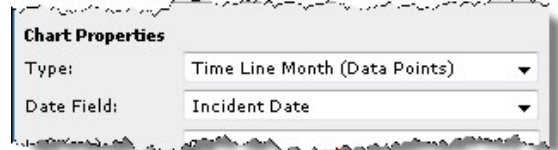**7. All other modifications to a field need to be done via the Field Properties**

Below is a list of additional modifications that can only be made to a grouping field via the **Field Properties**

- **Label Text:** Changing the label of a grouping or removing the label if you only want to show the grouping value in your report e.g. **Acacia Private** instead of **Campus: Acacia Private**

Step ❺: Details

The Details section is where you select the fields you wish to display in your report. As some reports can be summary reports which only show totals, it is not a requirement to include Details in the report. You can select as many fields as required provided they can fit across 4 rows based on your selected layout option: Portrait or Landscape, A4 or A3

1. **Add a Field to display in the report**

❶ Click on the **Details** button to open the **Display Fields** list

❷ Find the field in the **Display Fields** list and drag to the **Details** section. Notice the same field will also appear in the **Page Header** section - this represents the column header for that field in your report. Continue to add fields until you have filled Row 1

❸ Whenever you add a field, the respective **Field Properties** window will display

❹ If you wish to add another row of fields, click on the **Add** ⊞ button and repeat the above steps
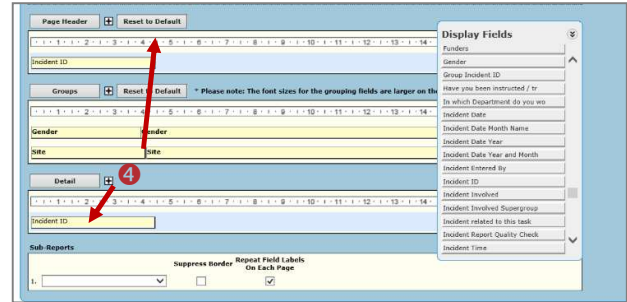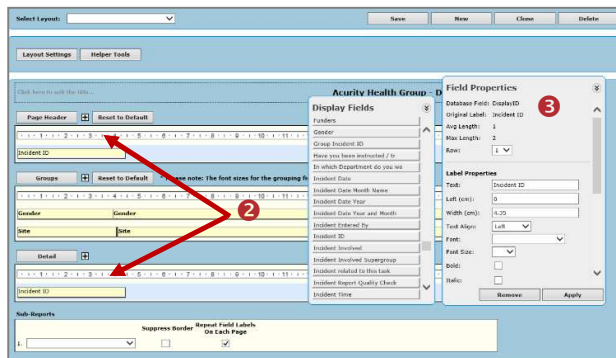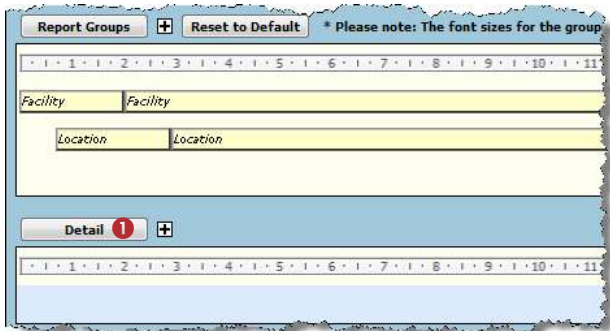
2. **Modify the field width or position of a Detail field on the Report Layout page**
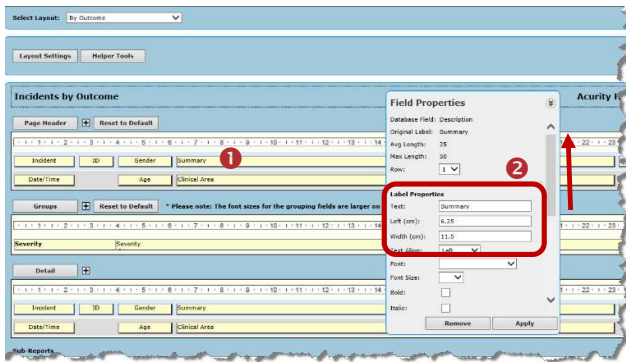
❶ To move a field, click on either the Page Header or Detail field and drag to the desired position. Notice that both the Page Header and Detail fields will move together

Note: You cannot move the field to another row. This must be done via the Field Properties

❷ To change the width of your field, click on the edge of either the Page Header or Detail field *(your cursor will change to ⇔)* and drag to the desired width
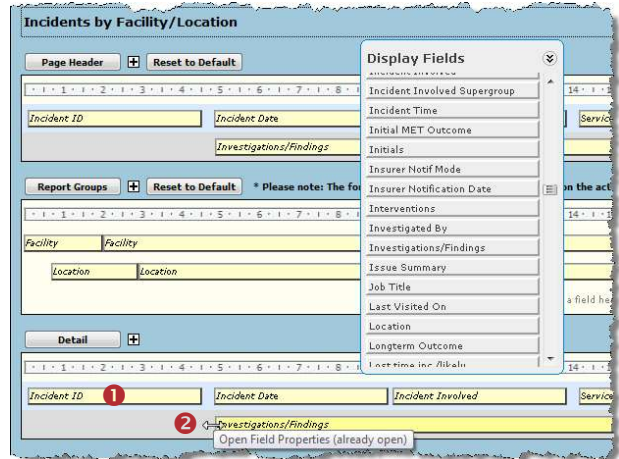
3. **Modify the field width or position via the Field Properties**

The position and widths of the Display fields can also be modified via the **Field Properties** of that field

❶ Click on the **Detail** or **Page Header** field to display its **Field Properties**

Modify the following in the **Field Properties** window:

❷ **Label Left/Width/Alignment:** These fields enable you to change the **Page Header** position, width and alignment e.g. centred, left align. You will find these under the **Label Properties** section

❸ **Field Left/Width/Alignment:** These fields enable you to change the **Detail** position, width and alignment e.g. centred, left align. You will find these under the **Field Properties** section

❹ Press **Apply**

4. Move a field to another row

If you need to move a field from one row to another, this needs to be done via the **Field Properties** in the same way you do for the Report Group fields

❶ Click on the field that you wish to move in either the **Detail** or **Page Header** sections to open its **Field Properties** window

❷ Enter the **Row** number

❸ Press **Apply**
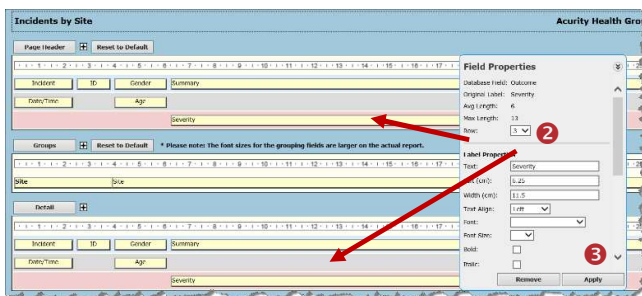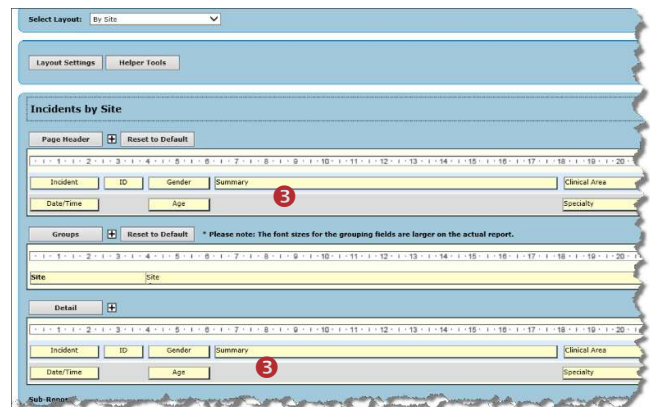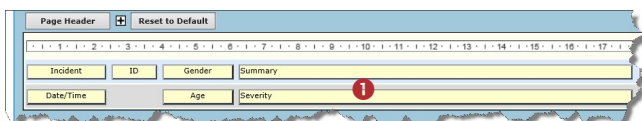
*Note: You **cannot** drag and drop a field from one row to another. As is with Report Groups, if there is a blank row at the end of the Details/Page Header sections, it will disappear once you save the report. If there is a blank row in the middle of the Detail/Page Header sections, it will remain when you save the report. You will need to move your fields around so that the blank rows appear at the bottom of the Detail/Page Header sections*
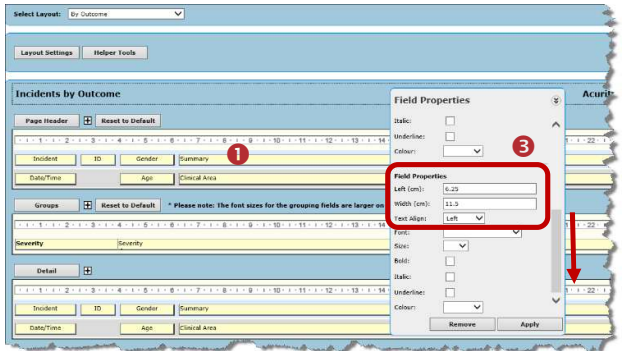
5. Remove a field

If you need to remove a display field, this needs to be done via the **Field Properties**

❶ Click on the field that you wish to remove in either the **Detail** or **Page Header** sections to open its **Field Properties** window

❷ Press **Remove**

- Press Ok to the pop-up message "*Are you sure want to remove this field?*" if you wish to proceed

❸ The field in both the **Display** and **Page Header** sections will be removed
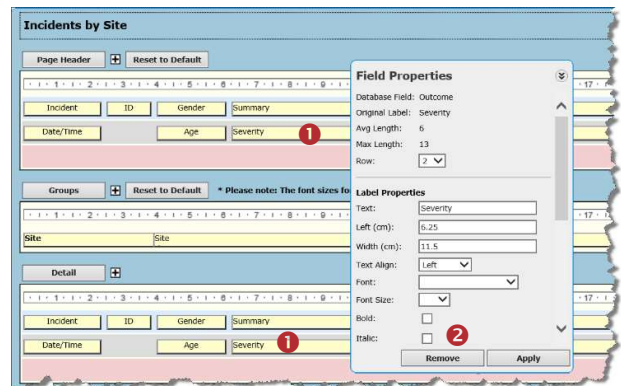
6.   Modify the label of a Display field

The label of the column header for a field is done via the **Field Properties**

❶ Click on the field in either the **Page Header** or **Detail** section to open its **Field Properties** window

❷ Enter the new label in the **Text** field under **Label Properties**

❸ Press **Apply** - the label will be changed in both the **Page Header** and **Detail** sections

- You may need to adjust the width of the field that you have re-labelled and also move the other fields to new positions (as in the example below)
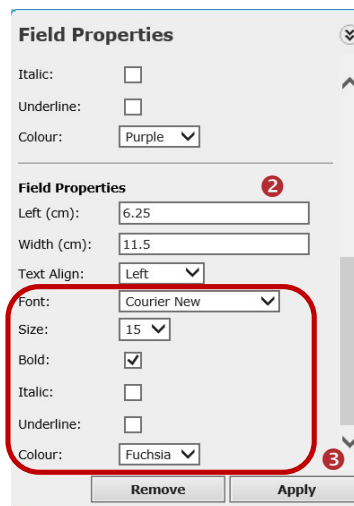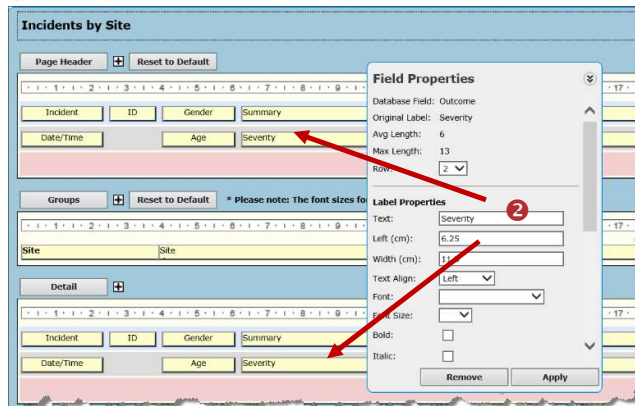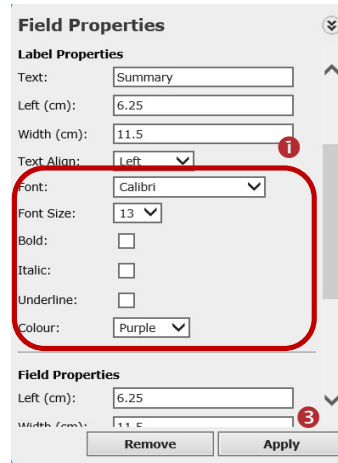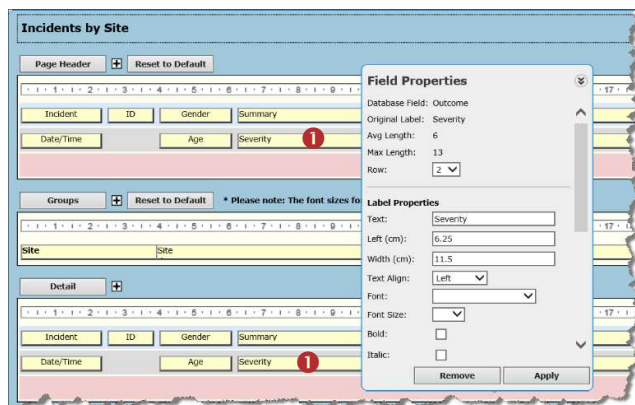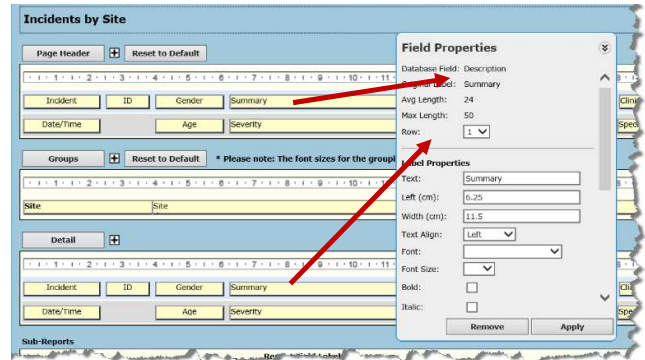
7.   Font, style and colour changes

You can change the font size, style and colour in the detail and header fields as listed below:

❶ Change the font style, size and colour of the **Label Properties**. This will change the font size and style of the label heading once the report is generated.

❷ Change the font style, size and colour of the **Field Properties**. This will change the font size and style of the field heading once the report is generated.

❸ Press **Apply**
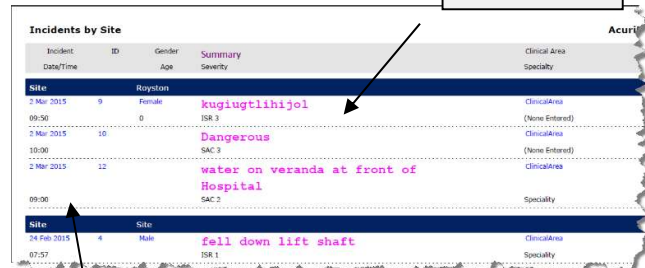
Field properties

Label properties

Step ❻ Sub-Reports

Sub-Reports are reports that are based on the sections of a Register form where a user can select more than one item. These include:

Incidents: Classifications, Contributing Factors, Journals, Associated Risks, Group Incidents

Feedback: Issues, Actions, Journals, Group Feedback

Risks: Journals, Associated Incidents, RRControls, RRAction, RRCatalystCauses, RRAssurance, RRConsequences, RRInvestigation

Note: Types commencing with RR relate the sub-form sections on the Risk Entry form

**Quality:** Classifications, Journals, Associated Risks, Group Quality Activities

Note: Refer to Step ❽, for more details on how to create a Sub-Report

To select an existing sub-report to be included with your main report

❶ Click inside the drop down list and select the sub-report you wish to attach to your main report

❷ If you check **Suppress Border**, there will be no border around the Sub-Report within the main report.

❸The **"Repeat Field Labels on Each Page"** option means that if the sub-report extends to the next page, any column headers for that sub-report will be repeated on the next page

❹ By default in the **Sub-Reports** section, only **one row** will display. Once you select a sub-report from the list, another sub-report row will display. You can select up to 5 sub-reports for any Register report
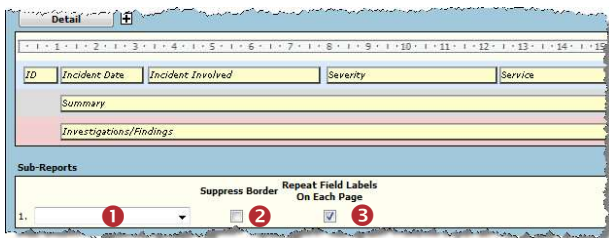
Example: No sub-reports have been selected
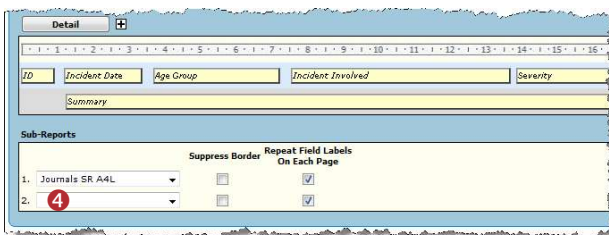
Example: One sub-report has been selected. Notice an additional sub-report line will display

Step ❼ Save Report

When you have completed customising your report layout, and have included any sub-reports, you are now ready to save your Report

❶ Press the **Save** button to save the report

❷ Press the **Close** button to close the Custom Report Layout Editor

❸ You will be returned to the respective Register Reports page and the report you just saved will automatically be selected in the **Select Layout** list


Note: If you do not press the Close button, then the report that you created will not be available in the Select Layout list on the respective Register Reports page. You will need to refresh the page to view the report. If you do press the Close button then the report you created will automatically be selected from the Select Layout list on the respective Register Reports page (as in the example above)
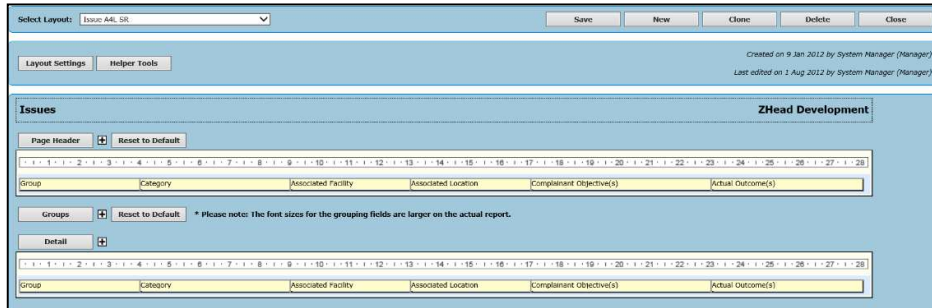
Step ❽: Create a Sub Report

A sub-report is a custom report that when associated with a **Register Report** links to each Register record that is displayed in your report *(refer to examples below and on the next page)*
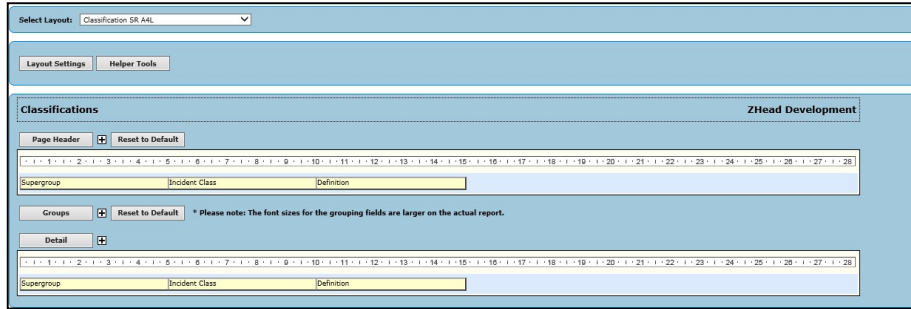
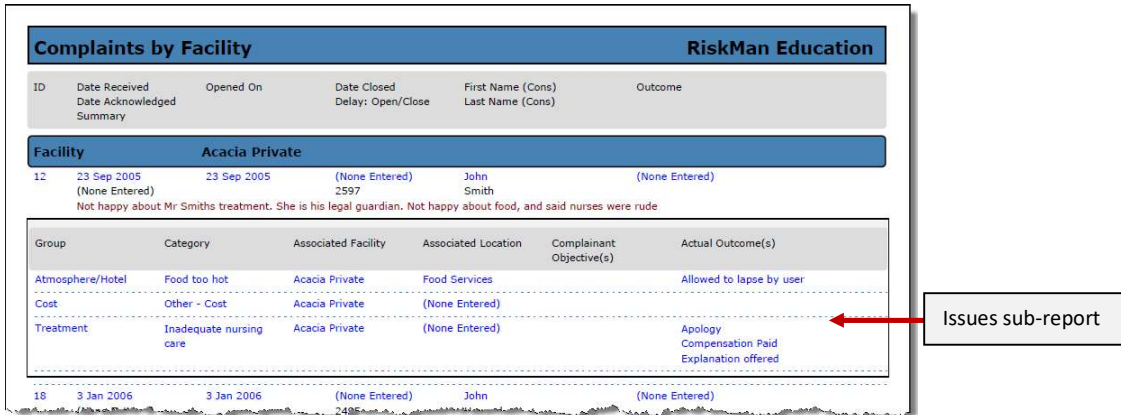***Example:*** *Classification Sub-Report used in Incidents*
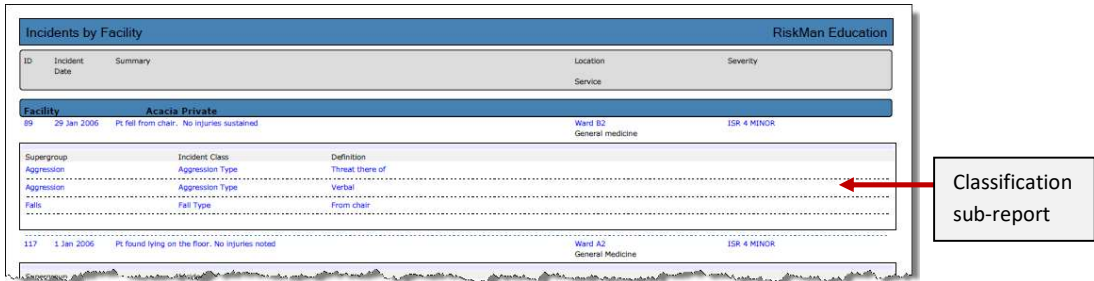
Example: *Incident Report showing a Classification Sub-Report*

Example: *Issues Sub-Report used in Feedback*

Example: *Feedback Report showing an Issues Sub-Report*

Example: Actions Sub-report used with a Risk Report

Example: Controls Sub-report used with a Risk Report

Example: Risk Report showing a Controls & Actions Sub-report

To create a sub-report

Follow **Steps ❶ - ❺** & **❼** outlined on the previous pages. When creating a Sub-Report consider the following

In Step ❸ - Layout Settings

❶ **Report Layout Name:** If the report is only to be used as a sub-report, consider giving it a name that indicates this e.g. **Classification SR A4L** or **(Sub-Report) Classification A4L**, where SR = Sub-report, A4 = Page Type, L = Landscape

❷ **Type:** Select which part of the Register Form the information is coming from e.g. classifications in the Incident Register. On selecting one of these options, the fields available in the **Report Grouping** and **Detail** sections will include fields from these sections as well as fields from the main Register form

❸ Check **Hidden** so the report is not available in the **Select Layout** list on the main Register reports page. In most cases a sub-report would not make sense if it was run as a stand-alone report

❹ Ensure the **Page Type** and **Page Size** is the <u>same</u> as the Report you will be associating this sub-report with

❺ **Layout Options:** You will **not** need to check all the Layout options. Suggested options to check:

- **Show Report Title**: This shows the Title of the report as in the example of the Risk Sub-reports on the previous page

- **Show record Dotted Lines:** These lines separate each record in the sub-report

In Step ❹ - Report Groups

In most cases, when creating a sub-report, it does not need to be grouped *(as in the examples on the previous pages)*

Helper Tools

The **Helper Tools** button allows you to

- Align Detail, Page Header and Report Grouping fields

- Select fields that are to have the same width

- Swap the order of selected fields on the **same row,** in the same section

- Open and close various pop-up windows
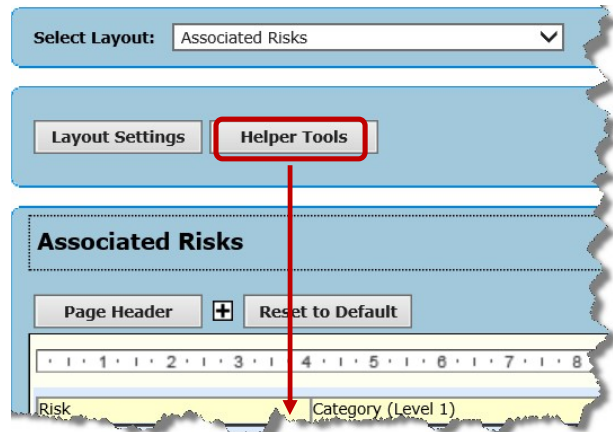
❶ <u>**Lock Field Movement:**</u>

- If <u>**checked**</u> (this is the **default** & **recommended**), it means that if you change the width or move the position of a display field in either the **Page Header** or **Detail** sections using your mouse, then <u>**both**</u> the header and field will be modified at the same time.

- If <u>unchecked</u>, then you will need to modify the **Page Header** and **Detail** fields independently

❷ Field Alignment:

The **"Field Alignment"** option allows you to align selected fields that appear underneath each other (useful if you have more than one row of Details), and make selected fields all have the same width

Example: Left Align selected fields

❶ Check **Select Fields**

❷ Check **Align Lefts**

❸ Click on the fields that you wish to align. The first field selected will be the "Master Field". All modifications will be based on this field

❹ Press **Apply**

❺ All selected fields will be aligned to the "Master Field"
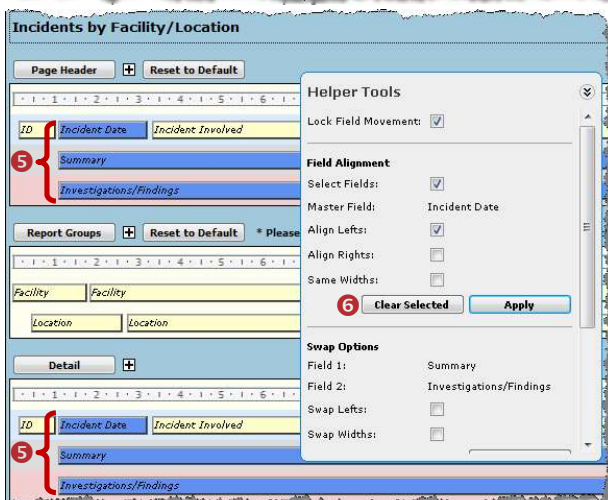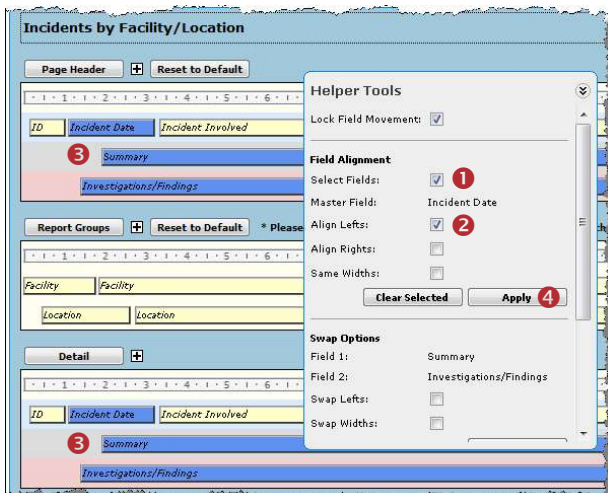
❻ To clear the selected fields press **Clear Selected**

❸ Swap Options:

This option allows you to swap the position and/or widths of 2 selected fields on the **same row**.

Recommended: If you are swapping "Display" fields you should select the same fields in both the Details and Page Header sections

Example: Swapping the Severity & Service Display fields

❶ Check **Select Fields**

❷ Check **Swap Lefts**

❸ Click on the fields that you wish to swap. Ensure you select the same fields in the Page Header & Details sections

Note: You cannot swap fields in the Report Groups section as there is only one grouping field per row

❹ Press **Apply**

❺ The selected fields will be swapped

❻ To clear the selected fields press **Clear Selected**

Note: You can also manually modify the widths and positions of fields from any row using drag and drop
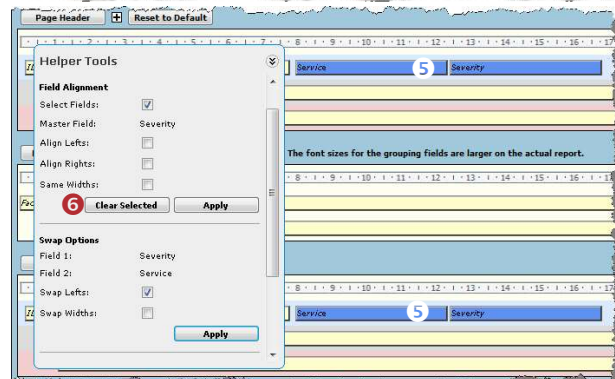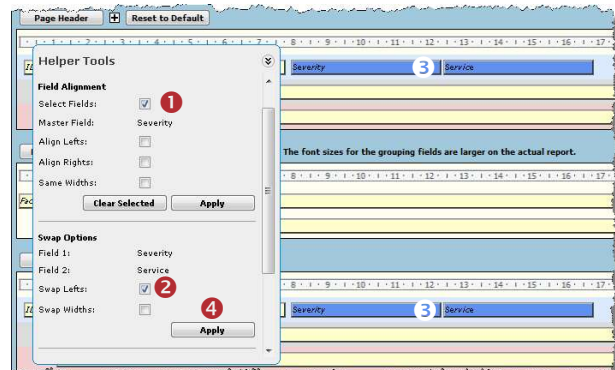
❹ Open/Close Window:

- If you **check** any of these options, the respective window/s will open.
- If you **uncheck** any of the options, the respective window/s will close

Link <Register> Sub-Reports

Definition: <Register> refers to any of the registers in your RiskMan system e.g. Incidents, Feedback, Risks and Quality.

In all Registers there is a concept of linking records with a similar theme. When you run a report that includes linked records you have the option to **"Consolidate Linked <Register>"** which means only the master record is included in the report.

If you would also like to view the child records, you would need to create a "Linked <Register>" sub-report.

Examples of where linking could be used:

- **Incidents:** A Linked Incident is usually one involving more than one person e.g. An Aggression incident. Each person involved would have their own Incident Record, but they would be linked together because they belong to the same event

- **Feedback:** A Linked Feedback could be; the same complaint raised by more than one complainant; a complaint and compliment received by one consumer

- **Risks:** An organisation with multiple sites may have a Falls Risk for each site which is managed by different Risk Owners. Each of these risks could be linked together

- **Quality:** Activity satisfaction surveys where the same tool is used on many occasions
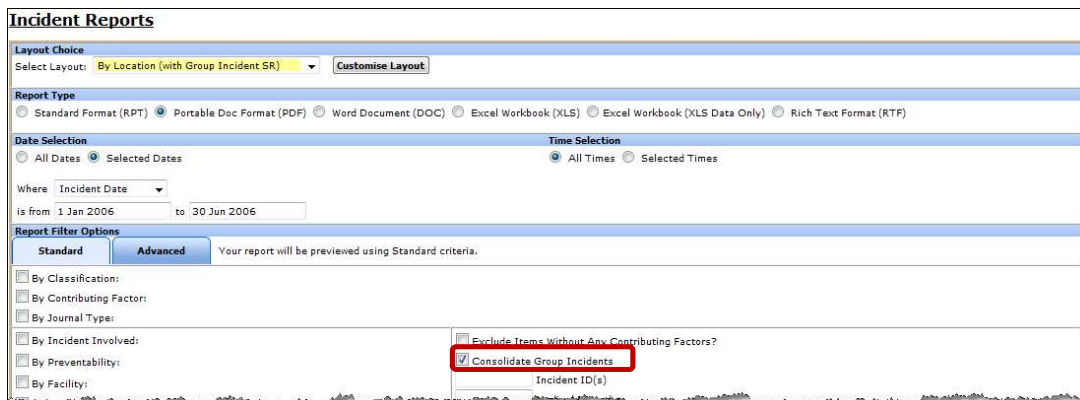
*Example: When previewing a report that has a **"Grouped <Register>"** sub-report e.g. Group Incidents, then you would check the respective **"Consolidate Group <Register>"** field under the Standard tab e.g. Consolidate Group Incidents*
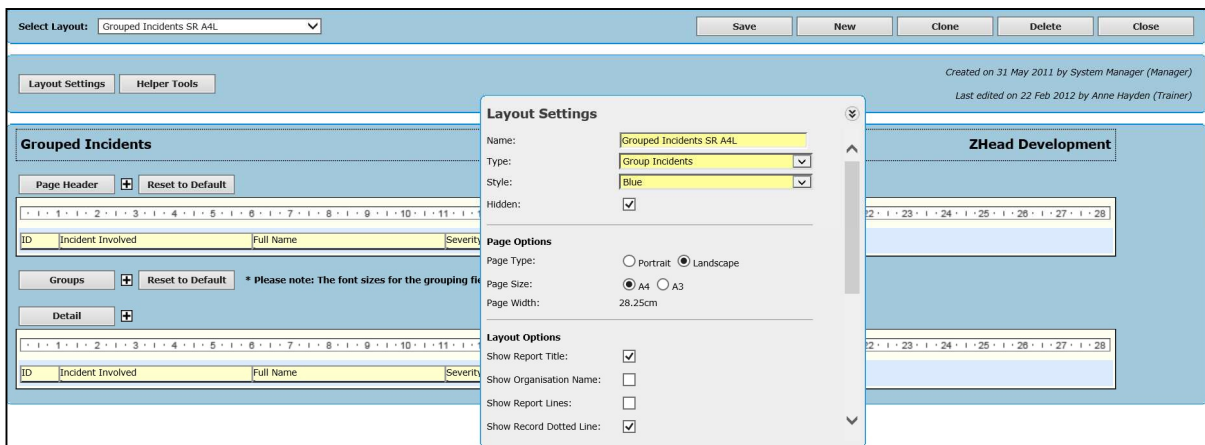

Example: Group Incident Sub-Report. The fields available to include in a Grouped <Register> sub-report will be those from the main Register Entry form - in this example that would be the Incident form fields

Excel™ Reports

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.
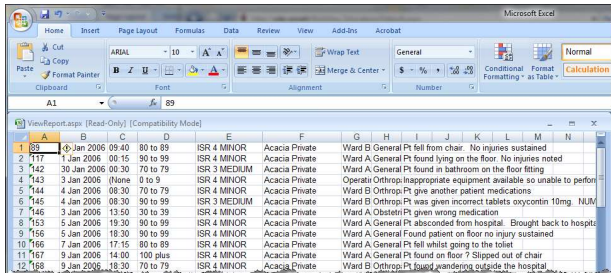
Sample "XLS Data Only" output

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.
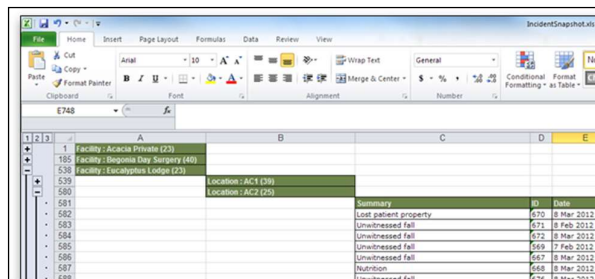
Sample "XLS Grid Format" output

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 possible 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*
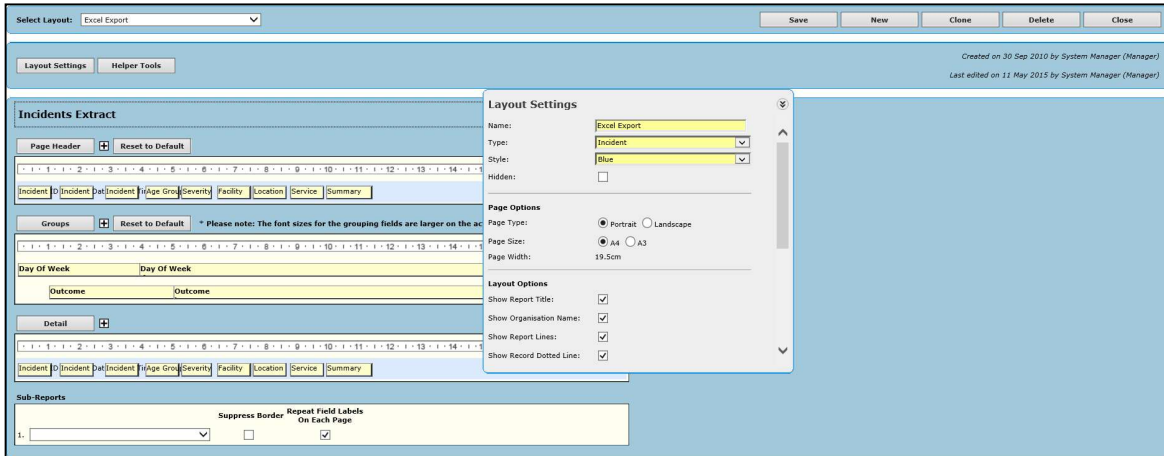
Example: *Incident Report configured to output to Excel™*
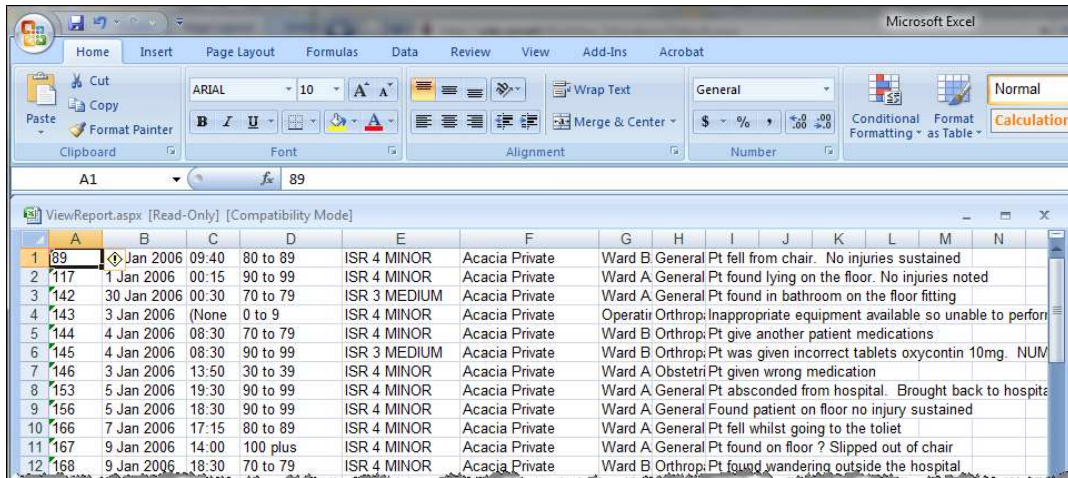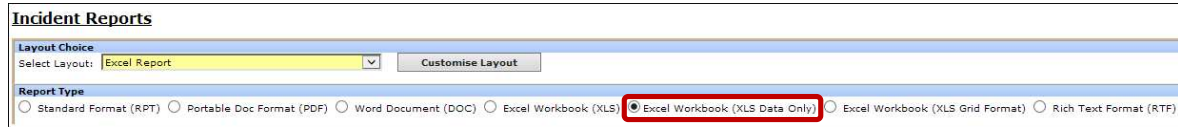
Example: *Incident Report exported to Excel™. When exporting to Excel™ check the "Excel Workbook (XLS Data Only)" output option to ensure your report is exported in a spreadsheet format*