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

 To create a custom report layout from a Register Reports page, click on the **Customise Layout** button to open the Custom Report Layout Editor

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nt

- 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

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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 0** list
- 2. Modify the report as required (refer to details on the following pages)
- 3. Press Save 🛛

Select Layout:		l 🕑 🛛	Save
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	(Sub-Report) Pressure Injury		
	(Sub-Report) RCA Causal Factors		
	(Sub-Report) Recommendations		
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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 **0** list
- 2. Press the Clone 2 button
- As the Report Name
 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 4

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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.

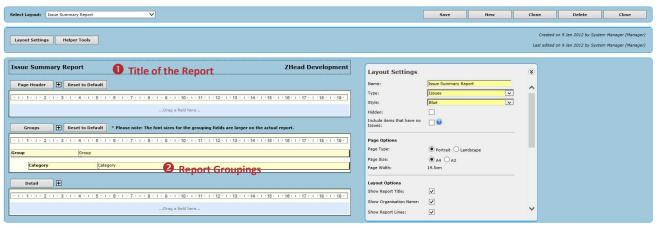
- Select the report you with to delete from the Select Layout list
- 2. Press the Delete button
- 3. Press **OK** to the pop-up message *"Are you sure you want to delete this report?"* if you wish to proceed

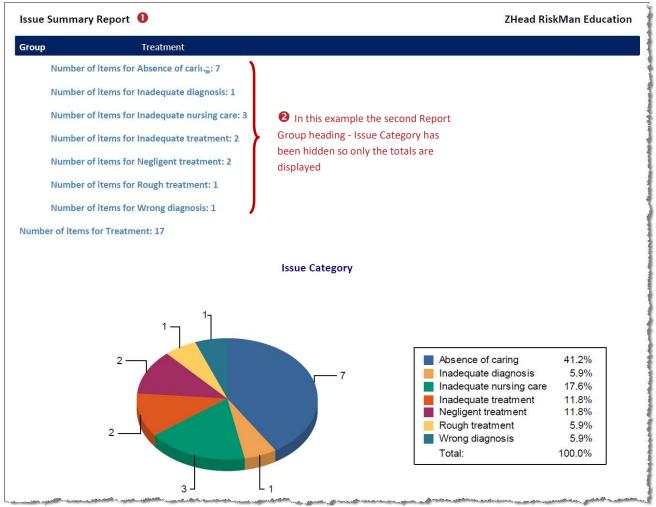
Example: Incident Report

Layout Settings Help	er Tools			Created on 10 Jan 2011 by System Manager (I Last edited on 29 Oct 2013 by System Manager (I
Incidents by Locatio	on 🕕 Title	of the Report	Acurity Health Group - Development	
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ID Incident Date	Severity	Site	Column headings	
Date/Time		Specialty		
Groups 🛨 Re	eset to Default * Please note: The	e font sizes for the grouping fields	are larger on the actual report.	
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Date/Time		Specialty	Content from the Incident Record	
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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





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

Select Layout: Risks by Accountable Exec (Actions & Controls)		Save	New	Ci	lone	Delete	Close
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Risks by Accountable Executive 1 Title of the Report			×				
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3.							

1115	ks by Accour	ntable Executive	a U						RiskMan Education
ID	Next Review Date	Risk Category		Risk Name Description				Residual Risk	Control Assessment Management Plan
Risk	(Owner	Fernandez, Brett (B	irett) 3						
	Risk Category	Finance							
66	(None Entered)	Finance			udgeted capital expenditure udgeted capital expenditure			Low	(None Entered)
	Risk Category	Information	Management						
7	18 Jul 2012	Information Management		IT disaster recovery IT disaster recovery				Medlum	Moderate (6) Active Management
Contr Audit	t of internal services perfo	ormance to criteria may be		Reviewed By ne Entered)	Last Reviewed On (None Entered)	Assessment Review Pending		Next Review By (None Entered)	Next Review On (None Entered)
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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 <u>all</u> Register reports

					V	U			
Select Layout:				[Save	New	Clone	Delete	Close
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Click here to edit the title	Layout Settings		۲						
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Sub-Reports Suppress Border Repeat Field Labels On Each Page	-								

Step **1**: Press New

If you have just opened the Custom Report Layout Builder you can proceed to Step **2**

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

Step 2: 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



Step Step

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

Incidents by Facility			Layout Settings		8
Page Header 🗮 Reset to D	efault		Name: Type:	Incident 🗸	^
+ 1 + 1 + 1 + 2 + 1 + 3 + 1 + 4 + 1	. 5 . 1 . 8 . 1 . 7 . 1 . 8 . 1		Style: 13 · 1 Hidden:	Blue 💌	
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· I · I · I · 2 · I · 3 · I · 4 · I		• 8 • 1 • 10 • 1 • 11 • 1 • 12 • 1 • •	13 1 1 Layout Options Show Report Title:	2	
iub-Reports			Show Organisation Name: Show Report Lines:	V	
1.	Suppress Border	Repeat Field Labels On Each Page	Show Record Dotted Line:	V	¥
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Descriptions of the Layout Settings

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Style: 🚯	Blue	
Hidden: (4)		
Page Options		
Page Type:	Portrait 🔘 Landscape	
Page Size:	● A4 ○ A3	
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Layout Options		
Show Report Title:		
Show Organisation Name:		
Show Report Lines:		
Show Record Dotted Line:	\checkmark	~
Show Discrete Record Count:		
Show Date Range:		
Show Date & Page Number:		
Totals		
Show Grand Total:		
Restrictions		
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• Name: Appears in your Select Layout drop down list on the Register Report's page

2 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 <u>https://hub.rldatix.com/SupportHUB/s/</u>

	ecommendations Recommendation#1			^ *
	Responsibility for Rec#1		👷 🕄 Rec#1 Project Code	
	Rec#1 Status	Proposed	-	_
1			Rec#1 Completed On	
	Rec#1 Outcome			*
_				v

Example: Recommendations on an Incident Entry Form

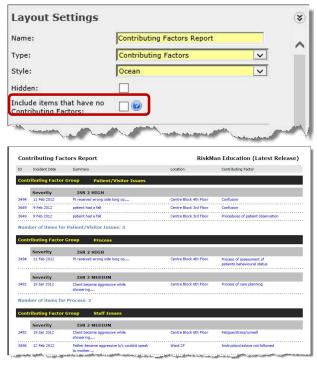
If you create a report based on one of the following **Report Types** in any Register (you may have additional ones depending on the setup in your RiskMan system), then a new option will display called **"Include items that have no <report type name>"**:

- 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?

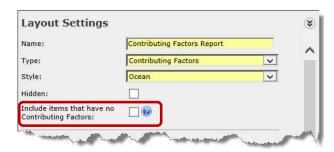
If the report you are creating is a **Parent** report e.g. you are creating a Classification report in Incidents; or an Issues report in Feedback; and the report is not going to be used as a sub-report, then this new option will be adhered to.

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 <u>only</u> show those incidents that

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



Con	tributing Fac	tors Report	Risk	Ian Education (Latest Release)
ID	Incident Date	Summary	Location	Contributing Factor
Cont	tributing Factor	Group (None Entered)		
	Severity	ISR 1 SEVERE		
466	17 Feb 2012	Pt found lying on the floor outside room large haematoma to L side of head and L leg.	Ward 7E	(None Entered)
678	10 Feb 2012	Medical emergency Code blue	R2	(None Entered)
1110	17 Mar 2012	Unwitnessed fall	Dayton	(None Entered)
1299	31 Mar 2012	Documentation omission	R2	(None Entered)
3442	7 Jan 2012	Pt administered potassium cyanide instead of saline	Day procedure unit	(None Entered)
3444	10 Jan 2012	BODY LOST ON WAY TO MORGUE	Cafeteria	(None Entered)
	Severity	ISR 2 HIGH		
232	3 Mar 2012	Hurt back when replacing operating table	Operating Suite	(None Entered)

ID	Incident Date	Summary	Location	Contributing Factor
Num	ther of items fo	r (None Entered): 1,271		
	iber of items to	(none Entered). 1,271		
Cont	tributing Factor	Group Patient/Visitor Issues	i i i i i i i i i i i i i i i i i i i	
	Severity	ISR 2 HIGH		
3494	11 Feb 2012	Pt received wrong side lung op	Centre Block 4th Floor	Confusion
7649	9 Feb 2012	patient had a fall	Centre Block 3rd Floor	Confusion
3649	9 FED 2012			
3649	9 Feb 2012	patient had a fall r Patient/Visitor Issues: 3	Centre Block 3rd Roor	Procedures of patient observation
3649 Num	9 Feb 2012 aber of items fo tributing Factor	patient had a fall r Patient/Visitor Issues: 3 Group Process		
3649 Num Cont	9 Feb 2012 aber of items fo tributing Factor Severity	patient had a fall r Patient/Visitor Issues: 3 Group Process ISR 2 HIGH	Centre Block 3rd Floor	Procedures of patient observation
3649 Num	9 Feb 2012 aber of items fo tributing Factor	patient had a fall r Patient/Visitor Issues: 3 Group Process		
3649 Num Cont	9 Feb 2012 aber of items fo tributing Factor Severity	patient had a fall r Patient/Visitor Issues: 3 Group Process ISR 2 HIGH	Centre Block 3rd Floor	Procedures of patient observation

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

Style: Select the colour/style for your report

O 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

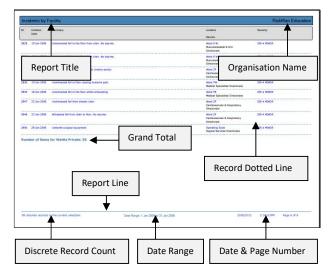
Page Options:

9 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

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

Layout Options - 🛿 Refer to the example below:



Restrictions

Socontains 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, <u>DO</u> <u>NOT</u> highlight any Sites/Regions

Step 4: 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

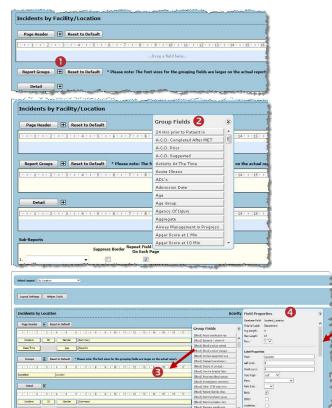
1. Add a Report Group Field

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

Provide the text of text of

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

O 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 **9**



2. <u>Modify the field width or position of a group field on</u> <u>the Report Layout page</u>

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• 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

O To change the width of your field, click on the edge (your cursor will change to ⇔) and drag to the desired width



3. <u>Modify the field width or position via the Field</u> <u>Properties</u>

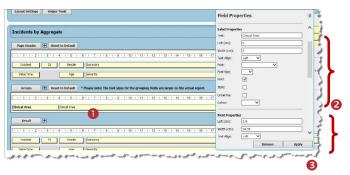
The position and widths of your grouping fields can also be modified via the **Field Properties** of that field

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

2 Modify the following in the Field Properties window

- 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

8 Press Apply



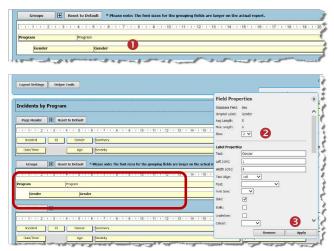
4. Move a group field to another row

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

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

2 Enter the **Row** number

8 Press Apply



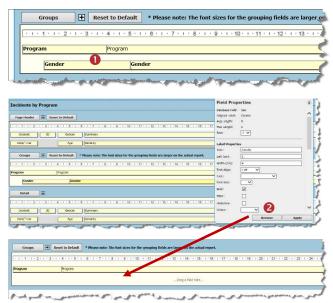
Note: You <u>cannot</u> drag and drop a field from row to another. If you have a blank row in the middle of the "Report Groups" section (as in the example above), it should be filled, as it will be saved with the report. To fill the row, either add another grouping or move the existing groupings (by 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. <u>Remove a field</u>

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

• Click on the field that you wish to delete to display its Field Properties

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:

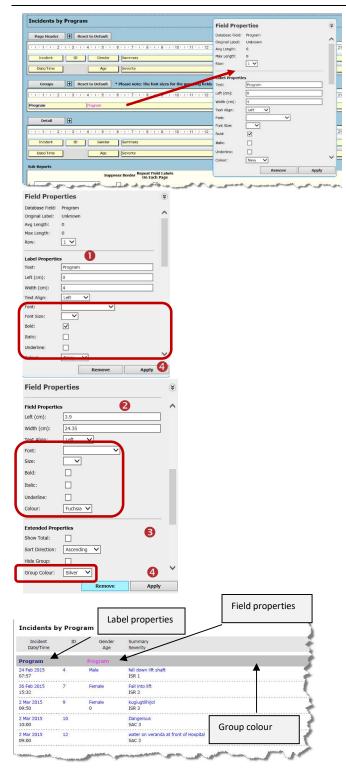
• Change the font style, size and colour of the Label Properties. This will change the font size and style of the group label heading once the report is generated.

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.

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.

O Press Apply

RISKMAN GUIDE TO USING THE CUSTOM REPORT LAYOUT EDITOR



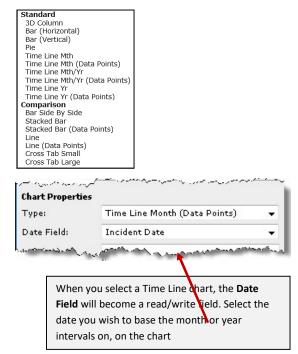
] RLDatix[®]

7. <u>All other modifications to a field need to be done via</u> <u>the Field Properties</u>

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

- 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.



• Click on the respective grouping field to display its Field Properties

2 If you make any changes, press Apply

lect Layout: by Location 🗸			Save		0mv	Clone	Delete
Layout Settings Helper Tools				Field Prop	erties	Croated o	on 18 kan 2011 n
Perge likeder				Database Reld: Original Labet: Avg Length: Max Length:	Incident Los Department 9 12	ation	
1 1 1 2 1 3 1 4 1 5 1 5 1 7 Incident ID Gooder Summe	any	13 - 1 - 14 - 1 - 15 - 1 - 18 - 1 - 17 -	5800 F800	Row: Label Properti Text:	i v es locatore		
Caronyos 🕀 Reset to Default * Please in	by antes The faut skress for the grouping fields ar	e larger on the actual report.	_	Loft (cm): Width (cm): Text Align:	a Left V	3	
cation Luceton		12 - 1 - 54 - 1 - 15 - 1 - 56 - 1 - 17 -	1 - 10 - 1 - 10	Fort: Fort Size: Brid:	×	~	
Detail 🗄		13 - + - 54 - + - 15 - + - 16 - + - 17 -	1 - 18 - 1 - 19 1 ISBN	Italic: Usdafiline: Colour:			2
Incident ID Conder Summ Date/Time Age Sevent			1			Remove	Αρρηγ

C) RLDatix[™]

Step **5**: Details

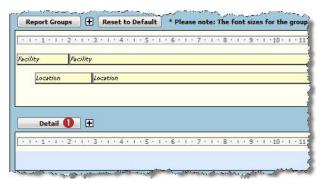
The Details section is where you select the fields you wish to display in your report. As some reports can be summary reports which only show totals, it is not a requirement to include Details in the report. You can select as many fields as required provided they can fit across 4 rows based on your selected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

- 1. Add a Field to display in the report
- O 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

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

If you wish to add another row of fields, click on the Add
 button and repeat the above steps





	Display Fields Funders	۲
ncident ID	Gender	^
	Group Incident ID	
Groups	Have you been instructed / tr	
	In which Department do you wo	
· · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · · · 7 · · · 8 · · · 9 · · · 10 · · · 11 · · · 12 · · · 13 · · · 14 ·	Incident Date	
iender inder	Incident Date Month Name	
	Incident Date Year	
ine Site	Incident Date Year and Month	
	Incident Entered By	
Detail 🖽 🛃	Incident ID	1
	Incident Involved	
····1··1··2···3··1·4···5··1·6···7···8··1·9···10···11··1·12···13···14·	Incident Involved Supergroup	1
noident ID	Incident related to this task	
	Incident Report Quality Check	
ub-Reports	Incident Time	Ť
Suppress Border Repeat Field Labels On Each Page		-

2. <u>Modify the field width or position of a Detail field on</u> <u>the Report Layout page</u>

• 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

O 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

Page Header 🛨 Reset	to Default	Display Fields	۲	
1	. 1 . 5 . 1 . 6 . 1 . 7 . 1 . 8 . 1	Incident Involved Supergroup	1^	14 . 1
ncident ID	Incident Date	Incident Time		Ser
incluenc 10	Incidenc Date	Initial MET Outcome		joer
	Investigations/Findings	Initials		
		Insurer Notif Mode		
Report Groups 🛛 🛨 🛛 Reset	to Default * Please note: The for	Insurer Notification Date	(=)	on the a
1 • 1 • 1 • 2 • 1 • 3 • 1 • 4	+ 1 + 5 + 1 + 6 + 1 + 7 + 1 + 8 + 1	Interventions		14 . 1
14		Investigated By		
cility Facility		Investigations/Findings		-
Location Location		Issue Summary		-
11		Job Title		
		Last Visited On		a field
		Location		
Detail		Longterm Outcome		
1	· 1 · 5 · 1 · 6 · 1 · 7 · 1 · 8 · 1	Lost time inc Aikelu	1 +	14 · · 1
Incident ID	Incident Date	Incident Involved		Sez

3. <u>Modify the field width or position via the Field</u> <u>Properties</u>

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

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

Modify the following in the Field Properties window:

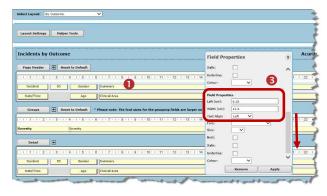
2 Label Left/Width/Alignment: These fields enable you to change the Page Header position, width and alignment e.g. centred, left align. You will find these under the Label Properties section

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

Output Press Apply

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Layout Settings Helper Tools				
ncidents by Outcome	Field Prop			* Acurity
Page Nader	Detabase Held Original Label: Avg Longth: Max Length: Row:		0	
Groups Image: Control of the comparison of t	Label Propert Test: Left (cm):	Summary 6.25		1 22
Severity Severity	Width (on): Text (lion)	11.5		
Detail B 1 + 1 + 1 + 2 + 1 + 2 + 1 + 4 + 1 + 4 + 1 + 4 + 1 + 2 + 1 + 12 + 1 + 12 + 1 + 12 + 1 + 1	Post: Post Size: Bold: Italic:		~	v
Date/Time Age Cinical Area	1	Remove	Apply	



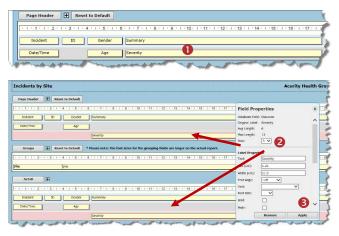
4. Move a field to another row

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

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

2 Enter the **Row** number

Press Apply



Note: You <u>cannot</u> 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

Page 12

5. <u>Remove a field</u>

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

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

Press Remove

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

• The field in both the **Display** and **Page Header** sections will be removed

Page Header 🕢 🕀 Reset to Default	Field Properties	*
1 • 1 • 1 • 2 • 1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 •	Database Field: Outcome	• 17
Incident ID Gender Summary	Original Label: Severity	^
Date/Time Age Severity	Avg Length: 6	
	Max Length: 13	
	Row: 2 V	
Groups	sizes fo Label Properties	
1 - 1 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1 - 6 - 1 - 7 - 1 - 8 - 1 -	Taxt: Savarity	- 17
e (Site	Left (cm): 6.25	
e ste	Width (cm): 11.5	
Detall	Text Align:	
	Font:	× _
1 • 1 • 1 • 2 • 1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 •	P · · · Font Size:	- 17
Incident ID Gender Summary	Bold:	~
Date/Time Ace Severity	Italic:	

Layout Settings Helper Tools	
ncidents by Site	
Page Meader 🖪 Reset to Default	
1 - 1 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1 - 6 - 1 - 7 - 1 - 8 - 1 - 9 - 1 - 10 - 1 - 11 - 1	- 12 - 1 - 13 - 1 - 14 - 1 - 15 - 1 - 18 - 1 - 17 - 1 - 18 - 1 - 19 - 1 -
Incident ID Gender Summary	Clinical Area
Date/Time Age 3	Specialty
Groups 🔣 Reset to Default * Please note: The font sizes for the grouping	
1 - 1 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1 - 6 - 1 - 7 - 1 - 8 - 1 - 9 - 1 - 10 - 1 - 11 - 1	
1 - 1 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1 - 6 - 1 - 7 - 1 - 8 - 1 - 9 - 1 - 10 - 1 - 11 - 1	
	- 12 - 1 - 13 - 1 - 14 - 1 - 15 - 1 - 16 - 1 - 17 - 1 - 18 - 1 - 19 - 1 -
1 1 1 1 2 1 1 3 1 4 1 5 1 6 1 7 1 8 1 8 1 8 1 1 1 1 1 1 1 1 1 1 1 1	- 12 - 1 - 13 - 1 - 14 - 1 - 15 - 1 - 16 - 1 - 17 - 1 - 18 - 1 - 19 - 1 -

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6. Modify the label of a Display field

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

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

Enter the new label in the Text field under Label
 Properties

• 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)

ncidents by Site		
Page Header 🕀 Reset to Default		
	Field Properties	*
1	Database Field: Outcome	17
Incident ID Gender Summary	Original Label: Severity	^
Date/Time Age Severity	Avg Length: 6	
Just The Just All Strends	Max Length: 13	
	Row: 2 🗸	
		-
Groups Reset to Default * Please note: The font si	cubertroperdes	
1		• 17
ite Site	Left (cm): 6.25	
	Width (cm): 11.5	
Detail 🛨	Text Align:	
	Font:	
1		• 17
Incident ID Gender Summary	Bold:	v 🗖
Date/Time Age Severity	Italic:	
Date/Time Age Severity		
	Remove App	ly 📃
and mine are pereny and a second seco	Remove App	ly
Incidents by Site Page Header	Field Properties	*
ncidents by Site Page Header	Field Properties Database Field: Outcome Original Label: Severty	»)-
Incidents by Site Page Header	Field Properties Database Field: Outcome Organal tabel: Severity Avg Length: 6	»)-
Incidents by Site Page Header	9 · · · · Field Properties Optabase Field: Outcome Optabase Field: Outcome Optabase Field: Outcome Avg Length: 6 Max Length: 6 Host Length: 13 Nom: 2 2	»)-
Incidents by Site Page Header	9 ··· Field Properties Datases Field: Outcome Original Label: Severity Ang Length: 13 Rost Length: 23 Rost Length: 33 Rost Length: 34 Rost Length: 35 Rost Length: 32 Rost Length: 33 Rost Length: 34 Rost Length: 35	»)-
ncidents by Site Page Header	P • • • Field Properties Dotabase Field: Outcome Original Label: Severity May Length: 6 Ane Length: 13 Room (Label: Properties) 2	»)-
ncidents by Site Page Header	₽ • • • Field Properties Database Field: Outcome Original Label: Severity Ang Length: 13 Note: Everity Label Properties 2 9 • • • • Text: Label Yourgeries 2 • • • • text: 0 • • • text:	*
Ancidents by Site Page Header	Field Properties Dutatess Field: Outcome Organia Label: Seventy Agulength: 6 Hote Length: 13 Tot: Seventy Length: 0,23 Wodth (cm): 12	*
Ancidents by Site Page Header	P • • • • Field Properties Database Field: Outcome Original Label: Severity Ang Length: 6 Heat entry: 13 How Executive: 2 Intel Properties P • • • Text: Severity Label Properties 2 P • • • Text: Severity Label Properties 2 Label Aroperties 2 P • • • Text: Severity Label Aroperties 2 Text: Severity 14 Label Aroperties 2 Label Aroperties 2	*
ncidents by Site Page Header Incident ID Gender Summery Oute/Time Age Seventy Groups Reset to Default * Please note: The font of the seventy it Site Detail	Image: Severity Image	*
Ancidents by Site Page Header		*
	9 · · · · · · · · · · · · · · · · · · ·	*
Incidents by Site Page Header Truckient Tuckient Tuck	P • • • • • • • • • • • • • • • • • • •	*

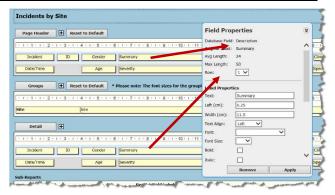
7. Font, style and colour changes

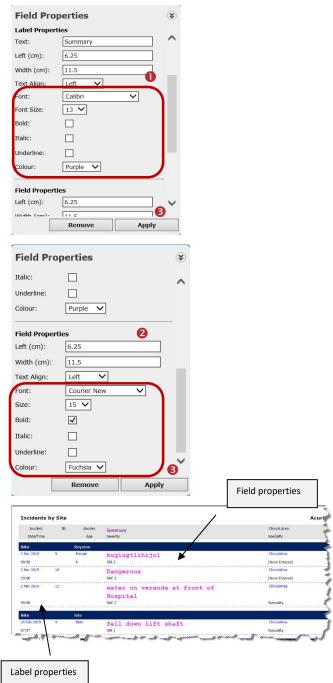
You can change the font size, style and colour in the detail and header fields as listed below:

• 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.

Change the font style, size and colour of the FieldProperties. This will change the font size and style of the field heading once the report is generated.

Press Apply





Step **6** 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 **9**, for more details on how to create a Sub-Report

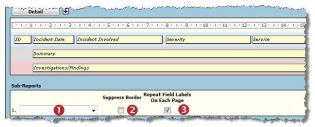
To select an existing sub-report to be included with your main report

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

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

• The "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

9 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

· 1 · 1 · 1 · 2 · 1 · 3 · 1 · 4	. 1 . 5 . 1 . 6 . 1 .	7 • 1 • 8 • 1 • 9 • 1 • 10 • 1 • 11 • 1	· 12 · 1 · 13 · 1 · 14 · 1 · 15 · 1 ·
D Incident Date Age	Group	Incident Involved	Severity
Summary			
ub-Reports	Suppress Basdas	Repeat Field Labels	
ub-Reports	Suppress Border	Repeat Field Labels On Each Page	
ub-Reports . Journals SR A4L	Suppress Border	Repeat Field Labels On Each Page	

Example: One sub-report has been selected. Notice an additional sub-report line will display

Step Save Report

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

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

Press the Close button to close the Custom Report Layout Editor



• 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

Layout Choice			
Select Layout:	Incidents by Facility/Location	•	Customise Layout
Report Type			
Standard Fo	ormat (RPT) @ Portable Doc Forma	(PDF)	Word Document (DOC) 🔘 Excel Workbook (XLS) 🔘 Exc

Note: If you <u>do not</u> 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 <u>do</u> 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 8: Create a Sub Report

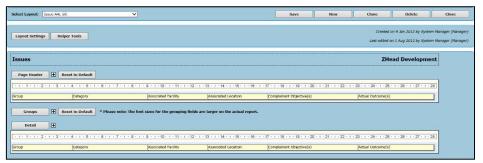
A sub-report is a custom report that when associated with a **Register Report** links to each Register record that is displayed in your report (*refer to examples below and on the next page*)

Select Layout: Classification SR A4L	v	
Layout Settings Helper Tools		
Classifications		ZHead Development
Page Header 🛨 Reset to Default		
· · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · Supergroup Incident Cla		· 17 · i · 18 · i · 19 · i · 20 · i · 21 · i · 22 · i · 23 · i · 24 · i · 25 · i · 28 · i · 27 · i · 28
Groups 🕂 Reset to Default * Ple	ase note: The font sizes for the grouping fields are larger on the actual report.	
Detail		· 17 · 1 · 18 · 1 · 10 · 1 · 20 · 1 · 21 · 1 · 22 · 1 · 23 · 1 · 24 · 1 · 25 · 1 · 26 · 1 · 27 · 1 · 28
1 1 1 2 1 3 1 4 1 5 1 6	- 7 - 1 - 8 - 1 - 9 - 1 - 10 - 1 - 11 - 1 - 12 - 1 - 13 - 1 - 14 - 1 - 15 - 1 - 16 -	17 1 18 1 19 1 20 1 21 1 22 1 23 1 24 1 25 1 26 1 27 1 28

Example: Classification Sub-Report used in Incidents



Example: Incident Report showing a Classification Sub-Report







Example: Feedback Report showing an Issues Sub-Report

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Select Layout:	Sub-Report) Actions A4L	~			Save	New	Clone	Delete	Close
Layout Settings	Helper Tools								em Manager (Manager) em Manager (Manager)
Actions							ZHe	ad Developme	ent
Page Header	Reset to Default	6 • 1 • 7 • 1 • 8 • 1 • 9 • 1 •	10 • 1 • 11 • 1 • 12 • 1 • 13 • 1	• 14 • 1 • 15 • 1 • 16 • 1 • 17 •	1 • 18 • 1 • 19 • 1 • 2	0 · 1 · 21 · 1 · 22 · 1	· 23 · 1 · 24 · 1 · 25	• 1 • 28 • 1 • 27 • 1 •	28
Action By Date	Allocated To	Completed On	Action Description		Action Response				
Groups	_	* Please note: The font sizes fo	r the grouping fields are larger	on the actual report.					
Detail	• 1 • 3 • 1 • 4 • 1 • 5 • 1 •	6 • 1 • 7 • 1 • 8 • 1 • 9 • 1 •	10 · · · 11 · · · 12 · · · 13 · ·	• 14 • + • 15 • + • 16 • + • 17 •	1 • 18 • 1 • 19 • 1 • 2	0 • • • 21 • • • 22 • •	• 23 • 1 • 24 • 1 • 25	. 1 . 26 . 1 . 27 . 1 .	28
Action By Date	Allocated To	Completed On	Action Description		Action Response				

Example: Actions Sub-report used with a Risk Report

Select Layout: (Sub-Report) Controls A4L.			Save	New	Clone	Delete	Close
Layout Settings Helper Tools						on 6 Sep 2012 by Syste n 18 Oct 2012 by Syste	
Controls					ZHe	ead Developme	ent
Page Header Reset to Default							
······································	9 10 11 12	13 · · · 14 · · · 15 · · · 1	8 · · · 17 · · · 18 · · · 19 · · · 20) · · · 21 · · · 22 · ·	· 23 · I · 24 · I · 25	· I · 28 · I · 27 · I ·	28
Control	Last Reviewed By	Last Reviewed On	Assessment	Next Review I	Зу [М	lext Review On	
Groups Reset to Default * Please note: The	font sizes for the grouping fields are	e larger on the actual repo	ort.				
Detail 🛨							
···1···2···3···4···5···6···7···8·	· · 9 · · · 10 · · · 11 · · · 12 · · ·	13 · · · 14 · · · 15 · · · 1	8 · · · 17 · · · 18 · · · 19 · · · 20) · · · 21 · · · 22 · ·	· 23 · I · 24 · I · 25	· · · 26 · · · 27 · · ·	28
Control	Last Reviewed By	Last Reviewed On	Assessment	Next Review R	Зу 🖪	lext Review On	
P							

Example: Controls Sub-report used with a Risk Report

	ks by Accourt	ntable Executiv	re					RiskMan E	ducation
D	Next Review Date	Risk Category		Risk Name Description			Residual Risk	Control Assessment Management Plan	
Risk	Owner	Fernandez, Brett (Brett)						
	Risk Category	Finance							
6	(None Entered)	Finance			eted capital expenditure eted capital expenditure		Low	(None Entered)	
	Risk Category	Information	Management						
i)	18 Jul 2012	Information Management	L.	IT disaster recovery pla IT disaster recovery pla			Medium	Moderate (6) Active Management	
Col	ntrols								
Contr					Last Reviewed On	Assessment	Next Review By		
			La	st Reviewed By	Last Reviewed Un	Assessment	Next Review by	Next Rev	Controls sub rong
Audit		formance to criteria may be by Internal Audit.		one Entered)	(None Entered)	Review Pending	(None Entered)	Next Rev	Controls sub-repo
Audit Isefu Servic	of internal services perf . Could be carried out b		(N	Charles and the			AND DECKLOPED AND A	(None Ente	
Audit Isefu Servic SMs c	of Internal services perf . Could be carried out b the level Agreement repo in a monthly basis	oy Internal Audit.	(N	one Entered)	(None Entered)	Review Pending	(None Entered)	(maine er	
udit isefu iservic	of Internal services perf. Could be carried out b te level Agreement repo in a monthly basis	oy Internal Audit.	(N	one Entered)	(None Entered)	Review Pending	(None Entered)	(maine er	
Audit Isefu Servic SMs c Action	of Internal services perf Could be carried out b te level Agreement repo in a monthly basis Cions By Date Alloo	vy Internal Audit.	(N (N	one Entered) one Entered) Action Description	(None Entered) (None Entered)	Review Pending Review Pending Action Response	(None Entered)	(maine er	erec)
Audit Isefu Servic SMs c ACI None	of Internal services perf Could be carried out b te level Agreement repo in a monthly basis Cions By Date Allio Entered) (Nor	vy Internal Audit. vrts distributed to Bayside	(N (N Completed On	Action Description Disaster recovery plan Services Committee w Disaster recovery plan Disaster recovery plan Services Committee w DRP resource comencil	(None Entered) (None Entered) s have been developed an ed commissioned by Shared th recommendations to h	Review Pending Review Pending Action Response d (None Entered) (None Entered)	(None Entered)	(maine er	

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

To create a sub-report

Follow Steps **1** - **5** & **∂** outlined on the previous pages. When creating a Sub-Report consider the following

In Step 6 - Layout Settings

• 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

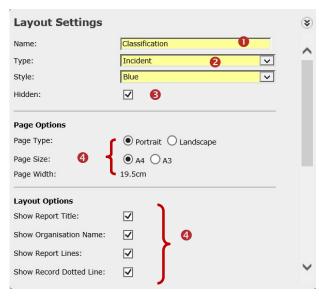
O Type: Select which part of the Register Form the information is coming from e.g. classifications in the Incident Register. On selecting one of these options, the fields available in the **Report Grouping** and **Detail** sections will include fields from these sections as well as fields from the main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

• 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 standalone report

O Ensure the Page Type and Page Size is the same as the Report you will be associating this sub-report with

6 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



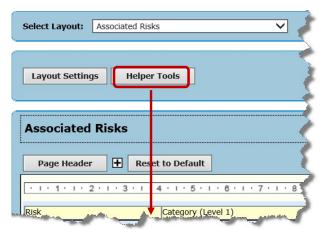
In Step **4** - Report Groups

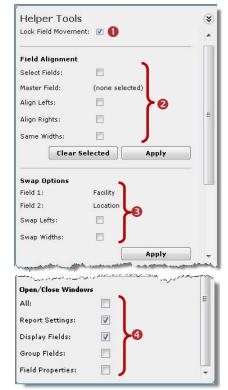
In most cases, when creating a sub-report, it does not need to be grouped (as in the examples on the previous pages)

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





Lock Field Movement:

 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

2 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

- Check Select Fields
- 2 Check Align Lefts

• 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

Output Press Apply

S All selected fields will be aligned to the "Master Field"

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

Incidents by Facility/Location			
Page Header			******
	Helper Tools		*
· · · 1 · 1 · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · ·	Lock Field Movement:		
ID Incident Date Incident Involved	Lock Field Movement:		- 🗍
3 Summary	Field Alignment		
Investigations/Findings	Select Fields:	V 1	
	Master Field:	Incident Date	
Report Groups 🕂 Reset to Default * Pleas	e Align Lefts:	2	H
1 2 3 4 5 6	Align Rights:		
Facility Facility	Same Widths:	[]	
	Clear Sel	ected Apply 4]
Location Location			
	Swap Options	2	
Detail 🛨	Field 1:	Summary	
· · · 1 · 1 · 2 · · 3 · · 4 · · · 5 · · · 6 · ·		Investigations/Findings	
ID Incident Date Incident Involved	Swap Lefts:		
	Swap Widths:		, , ,
Summary Investigations/Findings cidents by Facility/Location		and the second secon	×
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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

- Ocheck Select Fields
- 2 Check Swap Lefts

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

- Output Press Apply
- S The selected fields will be swapped
- **o** 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

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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

Open/Close Window	15	
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Report Settings:		
Display Fields:		
Group Fields:		
Field Properties:		

CRLDatix RISKMAN GUIDE TO USING THE CUSTOM REPORT LAYOUT EDITOR

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

Incident Reports	
Layout Choice	
Select Layout: By Location (with Group Incident SR) 🗾 👻	Customise Layout
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is from 1 Jan 2006 to 30 Jun 2006	
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By Classification:	
By Contributing Factor:	
By Journal Type:	
By Incident Involved:	Exclude Items Without Any Contributing Factors?
By Preventability:	Consolidate Group Incidents
By Facility:	Incident ID(s)
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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

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	Show Record Dotted Line:			~			

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.

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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.

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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 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

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Example: Incident Report configured to output to Excel[™]

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Report Type		

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Example: Incident Report exported to $Excel^{M}$. When exporting to $Excel^{M}$ check the "Excel Workbook (XLS Data Only)" output option to ensure your report is exported in a spreadsheet format