

- Report Library Administration -

FOR RISKMAN VERSION 2303

Last reviewed March 2023

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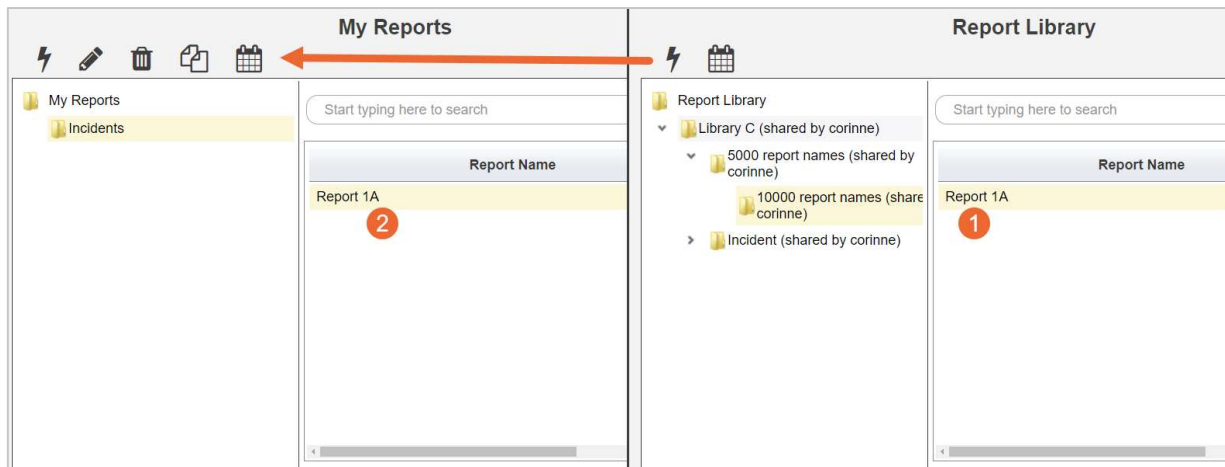
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INTRODUCTION

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

What does the Report Library do?

The Report Library allows you to create reports and save them in a central repository. The idea being that users (who have permission) can search the Library for a report that is relevant to them. Then, based on the user permissions they have, they can run the report, or take a copy of that report and store it somewhere in their My Reports to run in future as they need it. When a user takes a copy of the report from the Library into their My Reports, that report will assume the permissions of My Reports. For example, a user's permission should not allow them to edit reports in the library but My Reports, they're able to edit a report that have obtained from the library without impacting the report stored in My Reports for other users.



You can control which users should be able to see the different parts of the Library, which is represented by a familiar folder structure.

Should I use the Report Library in my organisation?

There are several factors which will influence whether you choose to utilise the Report Library in your organisation. These include, but are not necessarily limited to: the size of your organisation/RiskMan user base; the abilities of your users who need to generate qualitative reports; the degree of control you want to have over the reports that users ultimately generate in the system; the capacity of the users who will administer the Report Library.

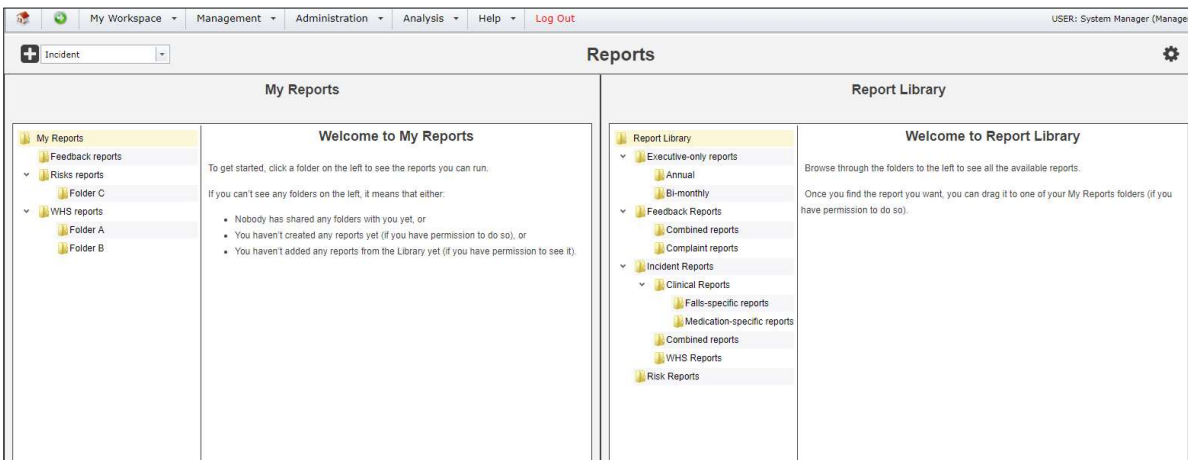
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In many cases, implementing “My Reports” and sharing folders with users (containing reports relevant to them) will be enough to satisfy local or lower level reporting requirements. We expect that the Report Library would be better suited to larger organisations. If you haven’t already done so, please feel free to contact RiskMan Support to discuss any questions that you may have: **+61 3 9686 0009** or <https://hub.rldatix.com/SupportHUB/s/>

How is the Report Library designed to work?

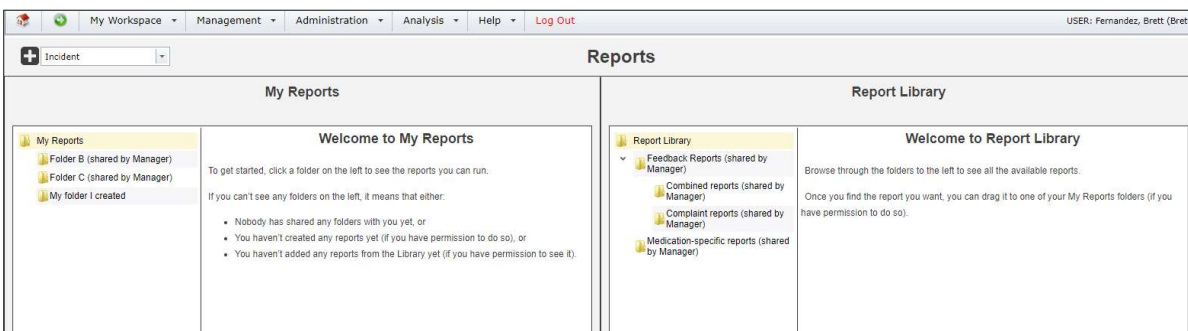
There is a number of ways the Library can be configured to work, however generally speaking you will need users who set up the Library, and the reports contained within it, and then allow other users to be able to browse the Library for reports that are relevant to them. Let’s have a look at what the Library might look like for an administrator, versus what a lower-level user (Brett) might see:

Administrator’s view:



Notice that the administrator can see all the folders in the Library on the right hand side, (on the left hand side is that user’s My Reports folders). The administrator needs to determine which users should be able to see each folder in the Library.

Brett’s view:



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As you can see, Brett only has permission to see *some* folders in the Library.

Note

Unlike when sharing a folder in My Reports, visibility will cascade down through folders in the Report Library. This is by design. In the example above, Brett has been granted permission to see the Feedback Reports folder, and as a result, can see the two subfolders in it. Brett does not need permission to each of the subfolders in order to see them.

With the **Medication-specific reports** folder, note that Brett can only see it, and not the parent folder (Incident reports). This behaviour is the same as what occurs in My Reports, and is by design.

Finally, note that next to each folder Brett is able to see in the Library is the name of the user who has granted him permission to see those folders.

SETTING UP YOUR LIBRARY

Deciding on a suitable folder structure for your Report Library

Naturally, the structure of the folders you create in the Report Library is completely arbitrary. Having said that, there are some recommended structure types which you may opt to use as a starting point, depending on how your system is configured and what would work best in your organisation.

By Register First



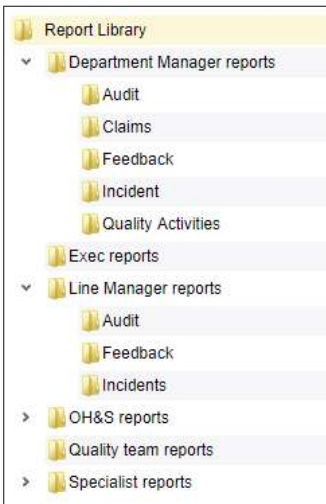
One of the easiest ways to organise reports would be to have the base-level folders named for each register in your system. This makes it easy to share with the users from specific templates from each register. The example we have used so far uses that idea, with the

addition of a folder specifically for Executives (as they may report from any register in the system in this instance).



In this example, the second level folders for Incident Reports contain subfolders based on different incident types. The Clinical Reports subfolder contains its own subfolders specific to various different types of clinical incidents.

By User Type first



Another way you might arrange your folder structure is by user type. In this example, we've made the base-level folders for the various user types in the system. The second level folders are for each register that they have reports for.

Ultimately, the structure you decide on, and the number of subfolders you need will be determined by your own unique requirements.

User Permissions associated with the Report Library

Before you can build your folder structure, you will need to do the following:

1. Ensure you have the correct user permissions enabled, either on your User Profile or User Template:

- a. On the **General** tab:

- **Can Access Reports V2**

This allows you to see the menu option Analysis > Reports.

- **Is Reports Library V2 Administrator**

This allows you to:

- *See all folders in the Report Library*
- *Modify the sharing permissions of all folders in the Report Library*
- *Delete any report, provided you have at least the Read/Write permission for the folder that contains the report you wish to delete*

- **Can View Reports Library V2**

This allows you to see the Report Library when you navigate to Analysis > Reports.

- **Can Share MyReports V2**

You will probably just want this on irrespective. Allows you to share folders you create in My Reports with other users, if you elect to do so.

- b. On each **Register**:

- **Can Save Reports to Library V2**

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Allows you to create reports and choose a folder in the Library as a save destination. You also need the permission “Can Create Reports V2”, and at least Read/Write permission to the desired folder.

- **Can View Reports V2**

Allows you to see reports for this register in Library and My Reports folders where you have at least the Read permission.

- **Can Create Reports V2**


*Allows you to create reports for this register. This permission also allows you to **edit** existing reports (where you have at least the Read/Write folder permission).*

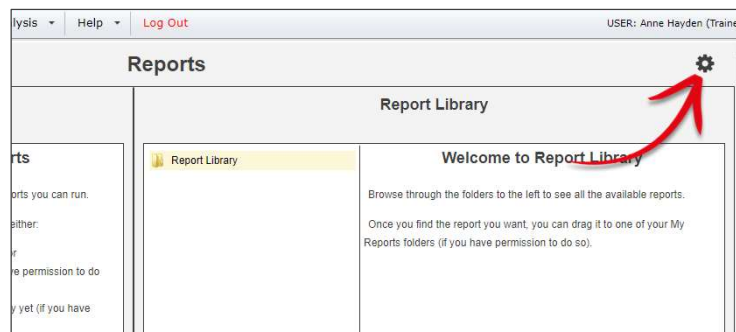
- **Can Modify Custom Reports V2**

Allows you to modify report layouts for this register.

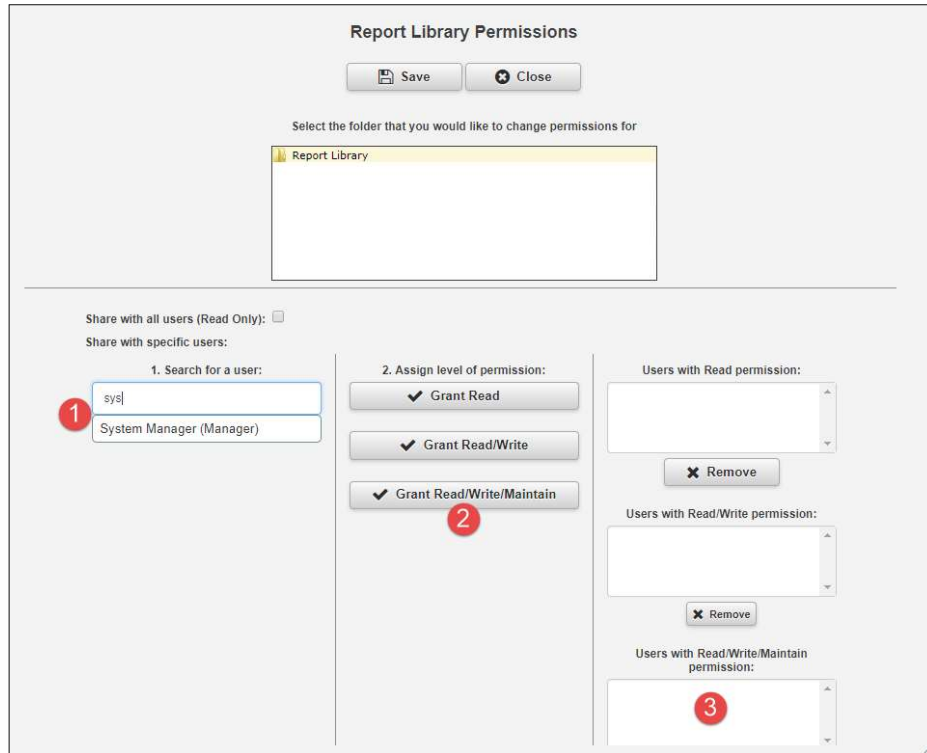
- **Can Schedule Reports V2**

Allows you to create schedules for generating reports automatically at the time frame you stipulate (if you are using the Scheduler option in your system). You will also need at least the Read/Write permission to the folder to use Schedules.

2. Grant yourself permission to the Report Library folders. It may seem odd, but you still need to designate your level of authority in the Report Library so that you can work with folders within it. To do this:
 - a. Open the Report Library by navigating to *Analysis > Reports*
 - b. Click the **cog** icon  on the far right of the toolbar:



- c. Follow these steps:



- 1 Start typing your name. Select your user profile when it is displayed.
- 2 Grant yourself the Read/Write/Maintain permission
- 3 Your username will appear in the list of users with that permission. You will now be able to maintain all folders that you subsequently create in the Library, because your Read/Write/Maintain permission cascades to all subfolders.

You can now create your desired folder structure.

Creating and modifying folders in the Library



To create a new folder in the Library, right click on the desired parent folder and click **Add New Folder**.

Type the desired name of your new folder and press Enter.

To edit a folder name, simply right click a folder and select **Rename**.


To delete a folder, right click it and click **Delete**. Please note that you must delete all content – reports and subfolders – before you can delete a folder. Deleting cannot be reversed.

To move a folder to a new location, click and drag a folder to a new parent folder.

Maximum number of subfolders

The maximum number of subfolder levels is 5. You can set a lower maximum number via the Global Setting *Reports > 220) What is the maximum number of folder levels allowed in the My Reports / Report Library structure?*.

Sharing Report Library folders with other users

To share a Library folder with other users, first click the **cog icon**  on the far right of the toolbar:



Next, select the folder that you want to share:



You can then share that folder, **and all its subfolders**, in any combination of the following:

- All users (with read only permission)
- Individual users
- An entire template of users

Keep in mind that you can save reports for any register in a folder, and users will only be able to see reports for registers where they have the permission **Can view reports V2**.

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Folder permissions

There are 3 levels of folder sharing permissions in the Report Library:

- Read
- Read / Write
- Read / Write / Maintain

Here's what each level of permission means:

PERMISSION	WHAT CAN THE USER DO?
Read	The user can see and run all the reports in the folder.
	They cannot add reports to the folder.
Read / Write	The user can see, run and edit all the reports in the folder.
	They can add reports to the folder (provided they have the user permission to save reports).
	The user can drag and drop a report from the Library folder to one of their My Reports folders.
	They can create schedules for reports in the folder.
	The user can delete reports in this folder which they created.
Read / Write / Maintain	The user can move reports to other Library folders (The user must at least have Read/Write permission in the destination folder).
	The user can see, run and edit all the reports in the folder.
	They can add reports to the folder (provided they have the user permission to save reports).
	The user can modify the sharing permissions of the folder.
	The user can change the name of the folder.
	The user can add, modify, and delete their own subfolders.
Read / Write / Maintain	The user can move the folder to another folder (The user must at least have Read/Write permission in the destination folder).
	The user can delete the folder, provided the folder contains no reports or subfolders.

Note

It is only possible to create schedules in My Reports. If a user wants create a schedule for a report which is in the Library, a copy of the report will be made in their My Reports in the equivalent folder. If that folder doesn't exist in their My Reports, it will be automatically created.

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