

# - Overview: Reports Version 2 -

FOR RISKMAN VERSION 2303

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## INTRODUCTION

One of the fundamental reasons for using a system like RiskMan is so that you can generate meaningful qualitative reports. Such reports help you answer important questions about what is happening in your organisation, and will help inform key decisions made at all levels of your business.

In version 17.01 of RiskMan, we have completely revamped the report creation and distribution process. The aim of this document is to provide you with an understanding of how we have changed the system, so that you can decide if and how you want to implement the new functionality in your organisation.

### How did report creation, My Reports, and the Report Library work previously?

The following summary of current functionality has been included in order for us to clearly illustrate how the Reports experience has changed.

#### Creating Reports



The ability to create reports is a per-register user permission.

When a user has permission to create reports in a register, a menu option appears, as denoted here.

Clicking any of these menu options takes you to the report *creation* page for the respective register.

#### Saving Reports

From that page, the user may select an appropriate layout, apply the necessary filtering, and **Preview** ❶ the report. We usually refer to this as **ad-hoc reporting**.

The ability to **customise report layouts** ❷ is a separate user permission, so you can allow a user the ability to create reports, but not let them potentially make unwanted changes to existing report layouts.

Finally, users with the appropriate permission will be able to **save the current report setup** ❸ either as a **My Report**, or to the **Report Library**, or both.

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**Risk Reports**

Layout Choice  
Select Layout: **By Inherent Risk** Customise Layout **2**

Report Type  
 Standard Format (RPT)  Portable Doc Format (PDF)  Word Document (DOC)  Excel Workbook (XLS)  Rich Text Format (RTF)

Date Selection  
 All Dates  Selected Dates  
 Where: **Date Opened**  
 Is from: **1 Jun 2017** to **30 Jun 2017**  
 By Month:

Report Filter Options  
 Standard Filters Advanced Filters Your report will be previewed using Standard criteria.

By Journal Type:  
 By Type Of Risk:  
 By Risk Category:  
 By Sub-Category:  
 By Facility:  
 By Location:  
 By Inherent Risk:  
 By Residual Risk:  
 By Risk Coordinator:  
 By Risk Owners:  
 By Risk Status:  
 By Acceptable Risk:  
 By Tertiary Category:  
 By Custom Selection: **3**

Preview Save Report **1**

**Save Report**

Report Name:   
 Report Title:   
 Organisation Title: **Education - V1602**

Allow editing of the report titles at runtime?  **ON**

Report Description / Comments:

Save to My Reports **4**  **ON**  
 Save to Library **5**  **ON**

Searchable keywords for this report:

Save Close

## Working with My Reports

The My Reports page contains all the reports the user has permission to see – whether they created the report them self, or was shared to them by another user.

My Reports							
Drag a column header here to group by that column							
Report Name	Report Title	Report For	Organization Title	Date Created	Comments	Permissions	View Generated
Falls by Facility	Falls by Facility	Incidents	Education	16 Jan 2014	hello world	<span>Edit Share</span>	
Consumer Feedback By Facility		Feedback		8 Dec 2008	Total Consumer Feedback reports (complaints and compliments) by Facility	<span>Share</span>	
					This is a detailed report of...		

If the user has permission to share reports, they will see the share/edit share buttons in the **Permissions** column, highlighted here.

If the user has the permission to create **schedules** so that the report is generated automatically, they will see the **Manage Report Schedules** tab when they select a report.

Schedules can only be created and generated for the single user; that is to say, a user cannot create a schedule and then nominate a group of people as recipients of that report when it is generated.

Back to My Reports **My Reports**  
Falls by Facility

Run Report Now Manage Report Schedules

Schedule Name:

Schedule Description:

Report Time Frame: The previous   up to


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Interestingly, there is no user permission around deleting shared My Reports. This meant that any user who can see a My Report, can also delete that report, irrespective of whether it was a report that user created, or a report that was shared to them. Needless to say, this is functionality that has been addressed in the new reports environment.

## Report Library

Users with the appropriate permission are able to access the **Report Library** from the My Reports page.

In the Report Library, a user can search the available reports for something that suits their requirements. They can then add a copy of that report to their own My Reports page.

Acacia Private Incidents by Location	RiskMan Education	Incidents	Education - V16	18
Page 4 of 5 (43 items) < 1 2 3 4 5 >				
Rows Shown 10	Save Grid Layout	Clear Grid Layout		
<b>Add from Library</b> 				

Report Library											
Search report names, descriptions, & keywords here: <input type="text"/>											
Select	Report Name	Report Title	Report Organisation	Target Register	Created By	Created On	Comments	Keywords	Added	Action	Repo
<input type="checkbox"/>	Acacia Private Incidents by Location	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	patient/client and location	<input checked="" type="checkbox"/>		125
<input type="checkbox"/>	AH Provisional Clinical Issues Risk Report	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	Monthly report for the XYZ committee	XYZ committee	<input checked="" type="checkbox"/>		127
<input type="checkbox"/>	Incidents by Severity	RiskMan Education	Education - V16	Incidents	Manager	21 Apr 2016	Incidents by Severity for all locations if no restrictions on user profile. Data represented in graph	Severity	<input checked="" type="checkbox"/>		129
<input type="checkbox"/>	Lauren training	Lauren training	Education - V16	Incidents	Manager	7 Nov 2016	Lauren training	Lauren training	<input checked="" type="checkbox"/>		140
<input type="checkbox"/>	Laurens Report	Laurens Report	Education - V1602	Incidents	Manager	24 Apr 2017	Laurens Report	Laurens Report	<input checked="" type="checkbox"/>		145
<input type="checkbox"/>	Laurens SV Report	Laurens SV Report	Education - V16	Incidents	Manager	16 Jun 2016		Laurens SV Report	<input checked="" type="checkbox"/>		132
<input type="checkbox"/>	This is a library report	This is a library report	Education - V16	Incidents	Manager	15 Dec 2016	This is a library report	This is a library report	<input checked="" type="checkbox"/>		142

Rows Shown

Close

### Properties

#### Incidents by Severity

Target Register: Incidents

Created On: Thu Apr 21 2016 11:12:12 GMT+1000 (AUS Eastern Standard Time)

Created By: Manager

Comments: Incidents by Severity for all locations if no restrictions on user profile. Data represented in graph

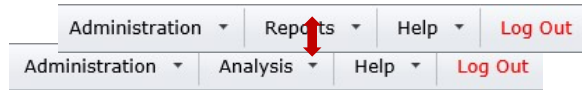
**Add/Update to My Reports**

The Report Library was not a very widely used tool (introduced in version 1601, January 2016).

## WHAT HAS CHANGED IN REPORTS VERSION 2?

### Changes to terminology

The first change we have made is the **Reports** menu option has been re-named **Analysis**:



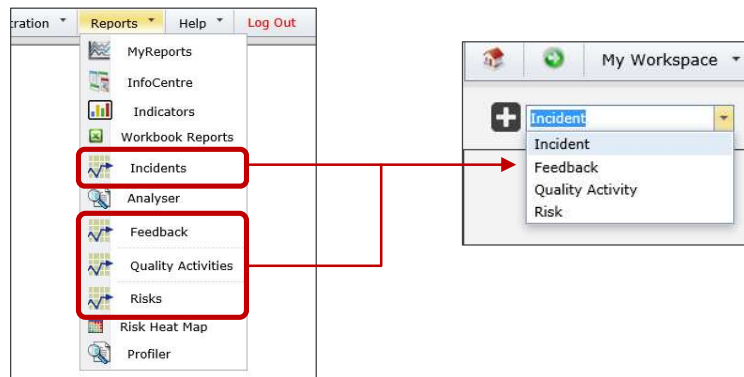
Within this menu option are the different analysis tools in RiskMan: the InfoCentre, Indicators, Workbook Reports, Analyser and **Reports**. We specifically wanted to re-purpose the term “reports” to represent the qualitative data reports that can be generated in RiskMan.

### Changes to the user interface

#### Creating Reports

The interface has been designed to closely mirror the Alerts Version 2 experience.

Instead of the separate menu items, a drop down list shows the user the registers for which they may create reports:



The report creation page also follows on from the alert V2 creation page. The various settings you can configure for a report are arranged into logical groupings. The idea is to go from top to bottom through those option groups, and configure what is required. Refer to the **Creating Reports** guide for detailed information.

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The screenshot shows the 'Create Incident Report' window. On the left is a vertical navigation menu with icons for: INTRODUCTION, FILE FORMAT, DATETIME RANGE, BASIC FILTERS, ADVANCED FILTERS, LAYOUT, ADDITIONAL OPTIONS (highlighted with a red box), and SUMMARY. The main area is titled 'Additional Options' and contains the following content:

Further options for creating your report. The number of options presented here depends on the selected register and report layout chosen.

- Consolidate linked Incidents**  
When checked, any linked Incidents in your report will be counted as 1 occurrence, instead of the sum of all linked Incidents. The information displayed in the report will come from the master record.
- Restrict to Sentinel Events only**  
When checked, only incidents which were marked as being Sentinel Events will be included in your report.
- Exclude items without any contributing factors**  
When checked, only incidents which have contributing factors recorded will be included in your report.

**More filter options:**

Incident ID(s)	<input type="text"/>
Medical record #	<input type="text"/>
Staff member ID(s)	<input type="text"/>
First name	<input type="text"/>
Surname	<input type="text"/>

**Add a footnote/ comment to your report.**  
You can add a footnote or comment to your report by entering text into this box. The footnote will be appended to the end of the report.

## Saving Reports

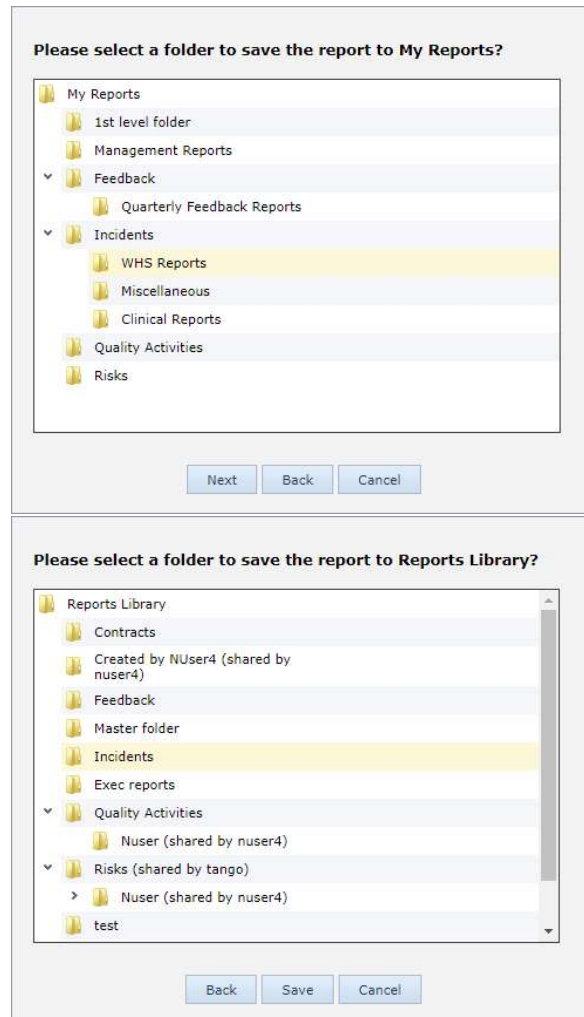
When a user creates a report and wants to save it, they will be prompted to choose the save location depending on the permissions they have for the register in question:

The dialog box is titled 'Where would you like to save this report?' and contains three radio button options:

- My Reports
- Reports Library
- My Reports & Reports Library

At the bottom of the dialog are two buttons: 'Next' and 'Cancel'.

In the above example, the user has permission to save a report to both the Library, and in their My Reports. The user will then be able to select first, the My Reports folder, then the Library folder:



### The My Reports experience

Previously, a user owned **reports**, which existed in their My Reports page. If they had permission to do so, they could share an individual report with other users.

Now, a user will own **folders**. Folders will be the entity that is shared with other users, instead of on a report-by-report basis.

This will streamline the creation, arranging, and sharing of reports in the system.

Move on to the next page to see the new My Reports interface.



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The screenshot shows the 'Reports' interface. At the top, there is a navigation bar with 'My Workspace', 'Management', 'Administration', 'Analysis', 'Help', and 'Log Out'. The user is identified as 'System Manager (Manager)'. Below the navigation bar, there is a 'Reports' section with a 'My Reports' sub-section. On the left, a folder structure is shown with 'My Reports' containing 'Incidents reports (migrated)', 'Risks reports (migrated)', and 'WHS reports'. A red box highlights the folder structure, and a red circle '5' is next to it. A search bar is located above the report list, with a red circle '3' next to it. The report list shows one report: 'WHS Incidents by Facility' with 'Has Schedule?' set to 'No' and 'Date Created' as '14 Nov 2017'. A red circle '2' is next to the report name. Below the report list, the 'Report Details' section is shown, with a red circle '4' next to the title 'WHS Incidents by Facility'. The details include: Target register: Incidents; Created on: 14 Nov 2017; Created by: Manager; Report description: This report should be tabled every month at the WHS review committee meeting; Reports generated by schedules: No; Added from library?: No; Original report title: WHS Incidents by Facility; Original organisation title: RiskMan Education. A red circle '1' is next to the 'WHS reports' folder in the left sidebar.

- 1 Folder structure:** These are the folders containing reports. There is a limit to the number of subfolders you are able to create, determined by your system administrator. The maximum number of subfolder levels is five.
- 2 Report list:** When you select a folder, the reports saved in that folder are displayed here.
- 3 Search this folder:** You can also search for reports from the current folder by name, description, and keywords. Start typing your search term and any matching reports will appear in the report list.
- 4 Report details:** This is the information we entered in the **Summary** option group when the report was created.
- 5 Report actions:** When you select a report, the available actions will appear, based on your individual user permissions.

## Sharing a My Report folder with other users

If you have the permission to do so, you can share folders from your My Reports with other users. When other users run the reports from folders shared to them, the data that appears in the resulting reports will be based on *that user's* domain, rather than *your* domain. This means there is no risk of users potentially being able to see information to which they have no permission.

Start by finding the folder you want to share, and right click on it with your mouse. This brings up the available options:

**Add New Folder** creates a new folder on the next level within the current folder.

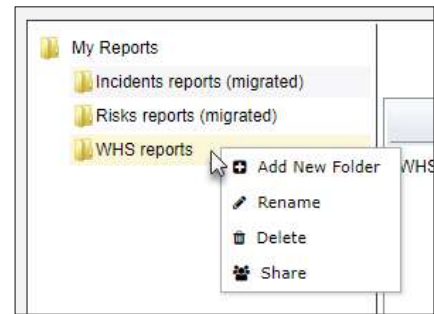
**Rename** allows you to change the name of the current folder.

**Delete** obviously deletes the current folder, however you cannot delete a folder unless it is already empty.

**Share** will allow you to set the share permissions for the current folder.

There are 3 levels of folder sharing permissions in My Reports:

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



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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 and run all the reports in the folder. They can add reports to the folder (provided they have the user permission to save reports).
Read / Write / Maintain	The user can see and run 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. The user can move reports to other folders (refer to page 29). The user can move the folder to another folder (refer to page 30). The user can delete the folder, provided the folder contains no reports or subfolders.

### Deleting a report

Even if a user has Read / Write / Maintain permission to a folder, they will not be able to delete a report which is not their own.

The only users who can delete a report are the **report's creator** and a user with the **Report Library Administrator** permission (*General > Reporting Permissions > Is Reports Library V2 Administrator*).

## Assigning sharing permissions

The screenshot shows the 'My Reports Permissions' window. At the top, there are 'Save' and 'Close' buttons. Below them is a 'Folder Name' field containing 'WHS reports'. The interface is divided into three main sections, each with a numbered red circle indicating a step:

- Step 1:** 'Share with all users (Read Only):' with a checkbox.
- Step 2:** 'Share with specific users:' containing:
  - '1. Search for a user:' with a text input field.
  - '2. Assign level of permission:' with three buttons: 'Grant Read', 'Grant Read/Write', and 'Grant Read/Write/Maintain'.
  - Three lists on the right for 'Users with Read permission:', 'Users with Read/Write permission:', and 'Users with Read/Write/Maintain permission:', each with a 'Remove' button.
- Step 3:** 'Share with an entire Template of users:' containing:
  - '1. Select a Register:' with a dropdown menu.
  - '2. Select a Template of users:' with a dropdown menu.
  - '3. Assign level of permission:' with three buttons: 'Grant Read', 'Grant Read/Write', and 'Grant Read/Write/Maintain'.
  - Three lists on the right for 'Templates with Read permission:', 'Templates with Read/Write permission:', and 'Templates with Read/Write/Maintain permission:', each with a 'Remove' button.

❶ **Share with all users:** Allows all users with permission to access Reports the ability to see this folder with **read only** permission.

❷ **Share with specific users:** Start typing a user's name in the text box. When you find the desired user, grant them the level of permission you want them to have. Their name will be added to

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the respective list box on the right hand side. To remove a user, select their name from one of the 3 list boxes and click the **Remove** button.

③ **Share with entire Template of users:** Select the register which contains the template of users to whom you want to grant permission, then select the desired template from the second drop down box. When you find the desired template, grant it the level of permission you want it to have. The template will be added to the respective list box on the right hand side. To remove a template, select its name from one of the 3 list **boxes** and click the Remove button.

**It should be noted that sharing permissions are not “cascaded” to any subfolders.**

Let’s look at the following folder structure example:

The screenshot shows the 'My Reports' interface. On the left, a tree view shows the following structure:

- My Reports
  - Feedback reports
  - Risks reports
  - WHS reports
    - Folder A
    - Folder B
    - Folder C

On the right, a table displays report details:

Report Name	Has Schedule?	Generated Reports	Date Created
WHS Incidents by Facility	Yes	6	14 Nov 2017

Now we will grant the user **Brett** read only permission to the **WHS reports** folder. When a user has a folder shared with them, the folder title appears as follows:

The screenshot shows the 'My Reports' interface. The folder structure on the left is the same as in the previous screenshot, but the 'WHS reports' folder is highlighted with a red box and labeled 'WHS reports (shared by Manager)'. The table on the right remains the same:

Report Name	Has Schedule?	Generated Reports	Date Created
WHS Incidents by Facility	Yes	6	14 Nov 2017

Note that Brett cannot see the other 3 folders in the WHS reports folder! Now we’ll grant Brett read only permission to **Folder B**. Here is what Brett’s view will be:

The screenshot shows the 'My Reports' interface. The folder structure on the left is now limited to:

- My Reports
  - WHS reports (shared by Manager)
    - Folder B (shared by Manager)

The table on the right now shows a single report:

Report Name	Has Schedule?	Generated Reports	Date Created
Here is another report	No	1	17 Nov 2017

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As you can see, permissions apply only to the individual folder concerned, and not the subfolders within it. But what if we give Brett permission to see **Folder B** but NO permission to the **WHS reports** folder? Here is the result:



## New user permissions model

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**
  - *Allows you to see the Report Library when you navigate to Analysis > Reports.*
- **Can Share MyReports V2**
  - *Allows you to share folders you have created in your My Reports*

b. On each **Register**:

- **Can Save Reports to Library V2**
  - *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**

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- *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).*

## Things that have not changed

### Report Layout Editor

The report layout editor has not changed as yet, and so the existing documentation remains current.

### Report Scheduler

The report scheduler itself has not changed, however we now have a separate guide for this functionality, as many clients choose not to utilise this feature.

## SWITCHING TO REPORTS VERSION 2

### 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.

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/> .



## Migrating your existing My Reports to the new interface

We recommend following these steps:

<b>Stage 1</b> Investigate the new functionality	<ul style="list-style-type: none"><li>• Review all the new reports documentation to get an understanding of all the functionality.</li><li>• Turn on the new user permissions for yourself in your demo, training, or other non-production site.</li><li>• Experiment with the new functionality. Play with My Reports, Report Library, and creating and editing reports.</li></ul>
<b>Stage 2</b> Determine your strategy	<ul style="list-style-type: none"><li>• Decide if you are going to utilise both My Reports <i>and</i> the Report Library, or just My Reports.</li><li>• If the former, decide how you want to structure your Report Library folders. Advice can be found in the Report Library Administration guide, but please also ask RiskMan if you need assistance.</li><li>• Consider which permissions you are going to grant to each user templates (do not apply them yet).</li></ul>
<b>Stage 3</b> Migration step 1	<p><u>In your demo, training, or other non-production system</u>, navigate to <i>Administration &gt; Tools &gt; Migration Tools &gt; Report Library Migration Tool</i>. If you cannot see the Tools menu under Administration, it is because you do not have the user permission <i>General Tab &gt; Can modify Global Settings</i>.</p> <p>The migration must be done in two stages. Run stage one now – <u>do not complete stage two yet</u>.</p> <p>As described on the migration tool page, stage one migrates all of the existing My Reports in the system to Reports V2. Any user who has created at least one My Report will then have a folder in their My Reports V2 page with those reports in them. There will be one folder for each register that they have reports for. For example, there will be one folder called "Incidents (migrated)", "Feedback (migrated)", and so on.</p>
<b>Stage 4</b> Review & test	<ul style="list-style-type: none"><li>• Verify that reports migrated successfully.</li><li>• Apply permissions to User Templates as you decided in Stage 2.</li><li>• Test the new functionality (and rejoice in being able to edit a My Report at last!).</li></ul>
<b>Stage 5</b> Migration step 2	<ul style="list-style-type: none"><li>• Return to the migration tool and run step 2. This will completely remove access to the old My Reports and report creation pages, as well as remove the old user permissions associated with them.</li></ul>
<b>Stage 6</b> Training and go-live	<ul style="list-style-type: none"><li>• Repeat stages 2 and 3 on your production/live site.</li><li>• Consider the training and communication requirements you have to launch this new feature to your users. Perform training as necessary.</li><li>• Once users have been educated, complete stage 4 on your live/production site. This is effectively your go-live!</li><li>• Complete stage 5 on your live/production site. This should only be done once you are satisfied that the new features are setup and running as expected on your live system, as it cannot be undone.</li></ul>