

- Report Library User Guide -

FOR RISKMAN VERSION 2403

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INTRODUCTION

This guide provides you with all the information required to use 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 is the Report Library?

The Report Library is just what you're thinking; a central place in RiskMan where you can browse or search for a report that meets your requirements.

There are many different ways the library could be setup in your organisation, and the features you can use will also depend on the user permissions that you have. There are 3 levels of permission you could have for any given folder:

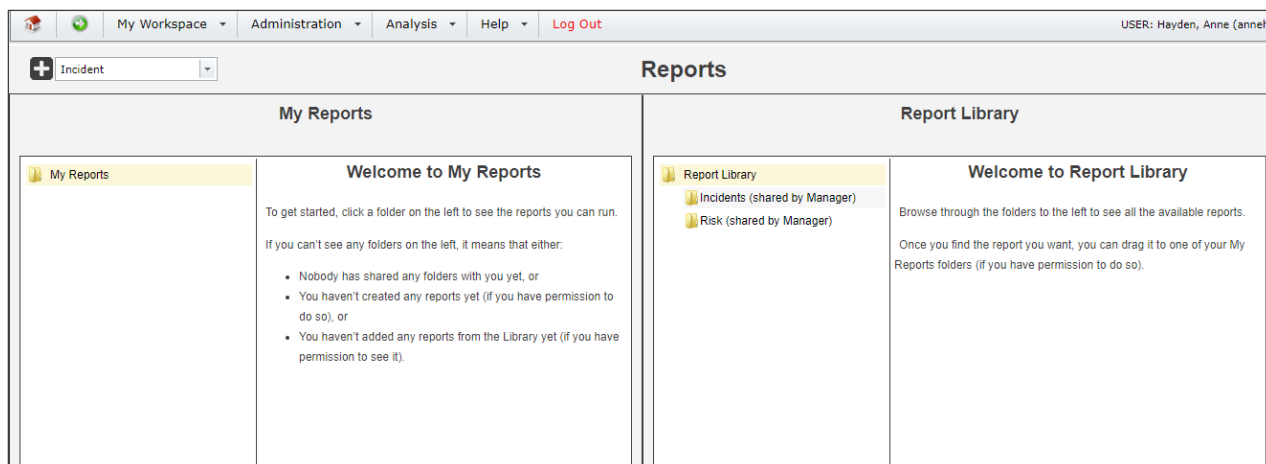
- **Read:** Can run reports from the folder, and perhaps create schedules to generate reports automatically.
- **Read/Write:** Same as above but can also save or modify reports in the folder. Can take a copy of a Library report and save it to one of their My Reports folders. Can delete reports they have created.
- **Read/Write/Maintain:** Same as above, but have full control over subfolders, and can delete any report that they have permission to see.

If you cannot find a suitable report in the Library

If you're unable to find a suitable report, you can create one yourself, provided you have the permission to do so. If you don't have the permission to create reports, you will need to request a report be created by an administrator.

What does the Report Library look like?

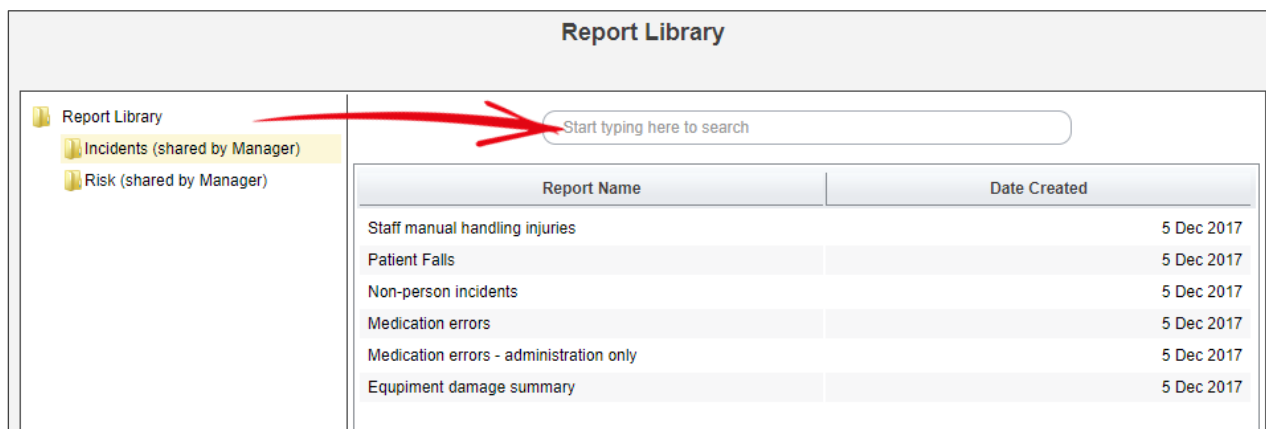
To access the Report Library, navigate to *Analysis > Reports*. On the left-hand side, you'll see My Reports; a collection of reports shared with you or created by you. On the right-hand side, you'll see the Report Library, and all the folders in the library that you have permission to work with.



WORKING WITH REPORTS IN THE LIBRARY

Finding reports

Sometimes you might browse a folder in the library containing a large number of reports. Keep in mind that you can search the current folder by typing some search criteria into the search box, shown here:



The title, description, and report keywords will be searched, so you have a better chance of finding a suitable report.

Report actions

When you select a report, the actions you have permission to take will appear as shown:

The screenshot shows the 'Report Library' interface. On the left is a navigation tree with categories like 'Department Manager reports', 'Exec reports', 'Line Manager reports', 'Quality team reports', and 'WHS Reports'. The 'Incidents' sub-category is selected. On the right is a table of reports with columns 'Report Name' and 'Date Created'. A toolbar at the top contains five icons: a lightning bolt (Run), a pencil (Edit), a trash can (Delete), a document with a plus sign (Clone), and a calendar (Schedule). A search bar is located above the table.

Report Name	Date Created
Staff manual handling injuries	5 Dec 2017
Patient Falls	5 Dec 2017
Non-person incidents	5 Dec 2017
Medication errors	5 Dec 2017
Medication errors - administration only	5 Dec 2017
Equipment damage summary	5 Dec 2017



RUN

Run the selected report. You'll enter the date and desired format. Everyone can see this action.



EDIT

Edit the configuration of this report. You need to have Read/Write permission.



DELETE

Delete the report. You can only delete reports that you created yourself.



CLONE

Makes a copy of this report. You need to have Read/Write permission.



SCHEDULE

Create a schedule to make this report generate automatically. This is a separate permission.

⚡ Run the report

You need **Read Only**, **Read/Write**, or **Read/Write/Maintain** permission to use this function.

The 'Run Report' dialog box for 'Staff manual handling injuries' contains the following fields and options:

- Report Title:** A text field with the value 'Leave blank for default' and a red circled '1' next to it.
- Organisation Title:** A text field with the value 'RiskMan Education' and a red circled '2' next to it.
- Date Range:** Radio buttons for 'All Dates' and 'Selected Dates' (which is selected), with a red circled '3' next to the 'Selected Dates' option.
- From:** A date field with the value '01 Nov 2017' and a calendar icon.
- To:** A date field with the value '30 Nov 2017' and a calendar icon.
- File Format:** A dropdown menu with 'Portable Doc Format (PDF)' selected and a red circled '4' next to it.

At the bottom are 'Run Report' and 'Cancel' buttons.

1 Leave the **Report Title** field blank to use the default title (in this example the report title would read “Staff manual handling injuries”), or enter your desired title, e.g. “Staff manual handling injuries – November 2017”. Note that some reports don't allow you to modify this title.

2 Modify the **Organisation Title** if required. Note that some reports don't allow you to modify this title.

3 Select the **date range** required for this report. The default date range is the last full calendar month. Select All Dates if you don't want any date filtering for your report.

4 Choose the **file format** in which you want your report generated.

Edit the report

You need **Read/Write** or **Read/Write/Maintain** permission to use this function.

Allows you to edit the configuration of this report. Refer to the **Creating Reports** guide for help with configuring reports.

If you edit a report in the Library, it does not affect copies of it that other users previously saved in their My Reports.

Delete the report

The only users who can delete a report are:

- The user who originally created the report, and
- Users who have the "Is Library Administrator" user permission

If you delete a report in the Library, it does not delete copies of it that other users previously saved in their My Reports. Deleted reports cannot be recovered, so be sure before you click this.

Clone the report

You need **Read/Write** or **Read/Write/Maintain** permission to use this function.

Make a copy of the selected report in this folder. You can then edit that report as required. Refer to the **Creating Reports** guide for help with configuring reports.

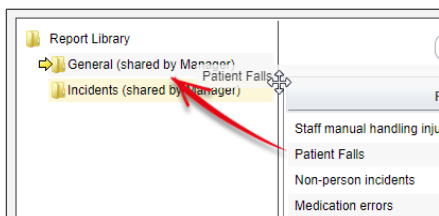
Schedule the report

Create one or more schedules, so that the report is generated automatically at the time frame you stipulate. This is a separate user permission, and might not be in use in your system. Refer to the **Report Schedules** guide for help with creating report schedules.

Moving reports

If you have at least **Read/Write** permission to folders, you can perform the following actions:

Move a report from one Library folder to another

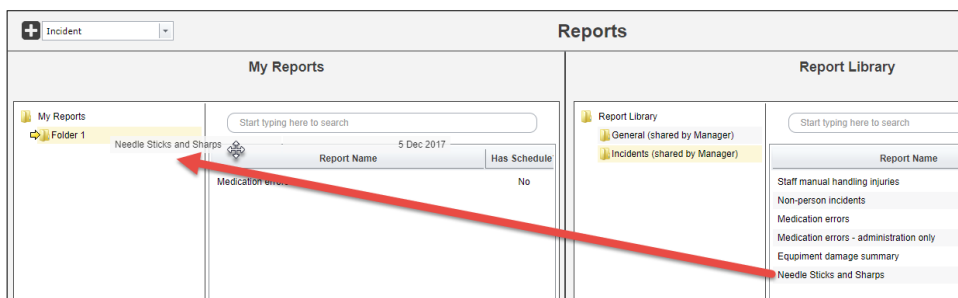


Simply drag a report to another folder to move it.

You must have Read/Write permission to both the source and destination folders to be able to do this.

Take a copy of a report from the Library and save it in a My Reports folder

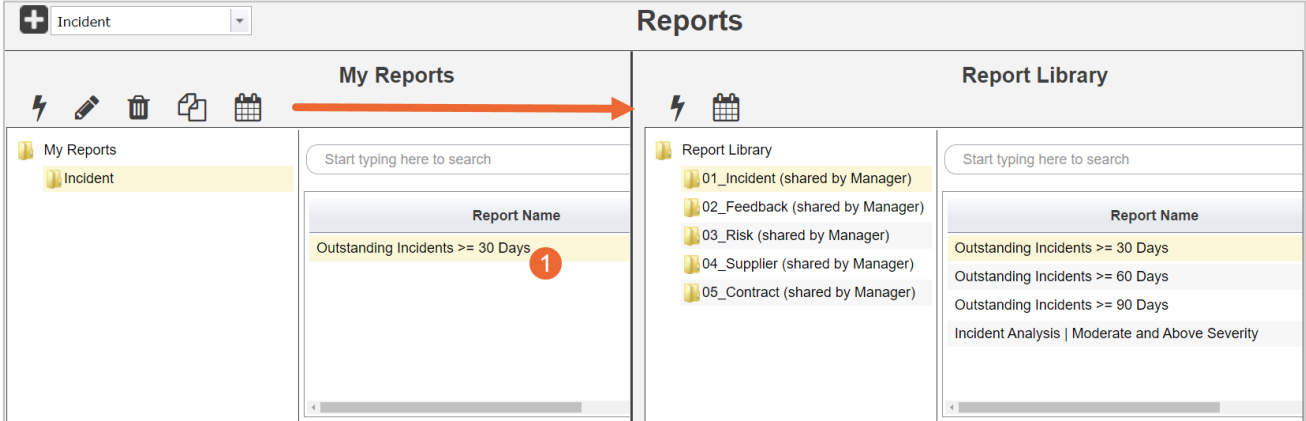
If you have Read/Write permission to a Library folder, you can also take a copy of a report from that folder and save it in a My Reports folder:



This copy is independent of the source report; you can modify or delete the copy in your My Reports, and it will not affect the source report in the Library. Similarly, if the source report in the library is modified, moved, or deleted, the copy you have in your My Reports remains unaffected by those actions.

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In the image below, you can see that the report in My Reports has been taken from the library. The logged in user does not have access to be able to edit that report in the library, but having taken a copy and placed that copy into their my reports page, they now are able to make edits and changes to that report without impacting the report in the library. This is helpful when the user needs to filter down further than the report filtering offers in the library.

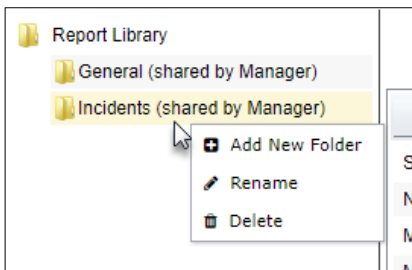


Working with folders

If you have **Read/Write/Maintain** permission to folders, you can perform the following actions:

Add, rename, or delete a folder

Right click a folder to see the available options:



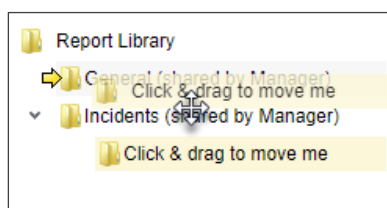
Add New Folder: Creates a new folder on the next level. Type the desired folder name and press the **Enter** key on your keyboard.

Rename: Change the name of the current folder. Type the desired folder name and press the **Enter** key on your keyboard.

Delete: Delete this folder. You cannot delete a folder if it contains any reports or subfolders.

Relocate or delete these in order to delete a folder. Deleting cannot be undone.

Move a folder



You can drag and drop a folder to another folder to relocate it. You must have the Read/Write/Maintain permission for both the source folder you are moving, and the destination folder you are moving it to.