- Creating Reports -

FOR RISKMAN VERSION 2509

Last reviewed October 2025

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INTRODUCTION

This guide provides you with all the information required to create qualitative reports. Please note that although the screenshots used in this guide will not match what is in your system, the techniques and functionality are transferable to any dataset in any module.

Especially if you are new to creating reports, we would strongly recommend familiarising yourself with the theoretical content of this guide before actually going to create a report – your experience will be a much smoother one.

What do reports look like?

Here is a sample of data output:

Incidents by Facility and Location — **RiskMan Education**

ID	Incident Date/Time	Gender Age	Summary Details	Service Day Of Week	Severity
Facility	**Wattle Private**				
Location	**Community Health Centre**				
418	31 Jan 2012 14:25	Male 50	Overdose verapamil (None Entered)	(None Entered) Tuesday	xxxxxxxxxx
2824	12 Jan 2012 21:30	Male 48	Unwitnessed fall from chair. Foot pain. (None Entered)	Medical Specialties Directorate Thursday	xxxxxxxxxx
Number of items for Community Health Centre: 2					
Location	**GICU**				
394	31 Jan 2012 22:30	Male 30	Wrong technique (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
397	31 Jan 2012 (None Entered)	Male 73	Extra dose given (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
413	31 Jan 2012 23:45	Male 20	Extra dose of antiobiotics. (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
417	31 Jan 2012 23:10	Female 50	Incorrect rate of Potassium Infusion (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
429	31 Jan 2012 14:00	Female 50	Wrong rate Nimodopine (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
431	31 Jan 2012 22:00	Female 78	Dose omitted (Intravite and trace elements IV) (None Entered)	Musculoskeletal & ICU Directorate Tuesday	xxxxxxxxxx
Number of items for GICU: 6					
Location	**Operating Suite**				
577	25 Jan 2012 07:20	Male 20	Protective equipment missing from mouth gag in tonsil set. (None Entered)	Sugical Services Directorate Wednesday	xxxxxxxxxx
2854	28 Jan 2012 16:30	Female 57	Unsterile surgical equipment (None Entered)	Sugical Services Directorate Saturday	xxxxxxxxxx

47 discrete records in the current selection. Date Range: 1 Jan 2012 to 31 Jan 2012 10/11/2017 3:05:53 PM Page 1 of 7

This example is based on an incident register, but reports will look the same irrespective of which register they are from. Note that the data in this report has been aggregated (grouped) on two levels; first by facility, then by location.

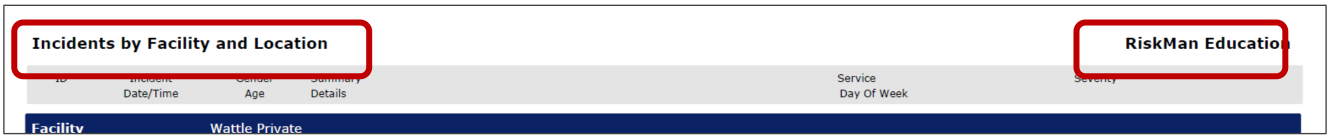
There is a fairly light amount of summary data for each incident in the report.

Your generated report can be either **A4** or **A3** in size, and in either **portrait** or **landscape** orientation.

Refer to the next page to see a breakdown of each editable component of the report.

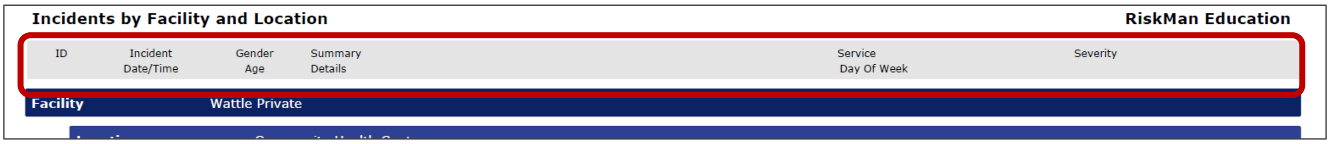
Components of a report

Report title and organisation name



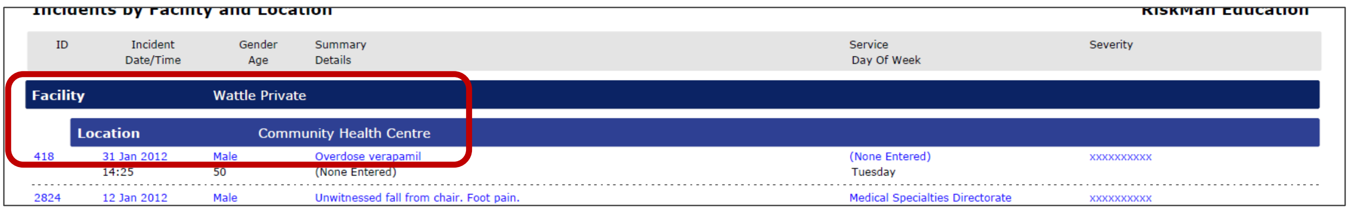
The report title and organisation name values can be defined when you save your report. There is also an option available that allows you to change these titles when you run the report – this can be useful, for example, if you want the title of the report to reflect the time frame of data in it, e.g. **Incidents by Facility and Location, Q3 2018**

Field label bar



This grey bar appears at the top of every page. It contains the names of the summary fields included in your report. You are able to choose which summary fields should appear in your report.

Data aggregation / grouping



The majority of the time you will want to aggregate (or group) the data in your report; you can aggregate the data by as many as 5 fields. Note that if you want to generate a chart, the chart is based on the field you chose to aggregate by.

Summary field data

397	31 Jan 2012	Male	Extra dose given	Musculoskeletal & ICU Directorate	xxxxxxxxxx
	(None Entered)	73	(None Entered)	Tuesday	
413	31 Jan 2012	Male	Extra dose of antibiotics.	Musculoskeletal & ICU Directorate	xxxxxxxxxx
	23:45	20	(None Entered)	Tuesday	
417	31 Jan 2012	Female	Incorrect rate of Potassium Infusion	Musculoskeletal & ICU Directorate	xxxxxxxxxx
	23:10	50	(None Entered)	Tuesday	
429	31 Jan 2012	Female	Wrong rate Nimodopine	Musculoskeletal & ICU Directorate	xxxxxxxxxx
	14:00	50	(None Entered)	Tuesday	
431	31 Jan 2012	Female	Dose omitted (Intravite and trace elements IV)	Musculoskeletal & ICU Directorate	xxxxxxxxxx
	22:00	78	(None Entered)	Tuesday	

Number of items for GICU: 6

This is the summary information for each record in your report. You are able to choose which summary fields should appear in your report. Note that you can have up to **4 rows** of data **per record** in a report.

Page footer

2854	28 Jan 2012	Female	Unsterile surgical equipment	Surgical Services Directorate	xxxxxxxxxx
	16:30	57	(None Entered)	Saturday	

47 discrete records in the current selection. Date Range: 1 Jan 2012 to 31 Jan 2012 10/11/2017 3:05:53 PM Page 1 of 7

The footer of each page can contain the discreet record count, the date range of the data included in the report, when the report was generated, and the page count.

Report criteria

Incidents by Facility and Location **RiskMan Education**

ID	Incident Date/Time	Gender Age	Summary Details	Service Day Of Week	Severity

Report Criteria (If Applicable)

Incident Date from
1 Jan 2012

Incident Date to
31 Jan 2012

Incident Involved
Patient/Client

Facility
Wattle Private

Comment/Footnote
This report details all incidents by facility and location and is used in the monthly subcommittee meeting.

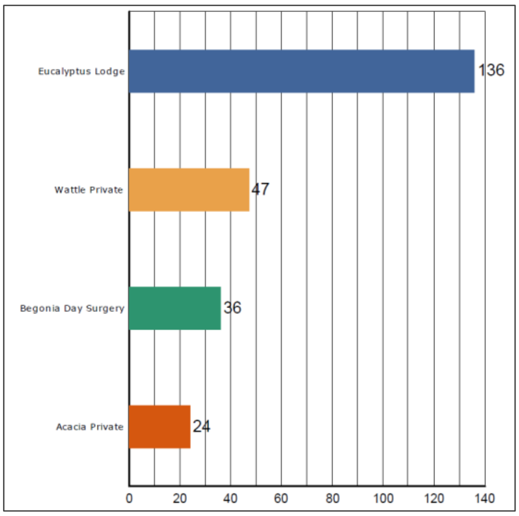
At the very end of your report you will find the **Report Criteria**. It includes:

- The **filtering** applied to the report (if any), and
- The report **Comment / footnote** (if entered), which is a free text area where you can put comments or information that helps contextualise the report, which is especially useful if the report you create is for other people and not just yourself

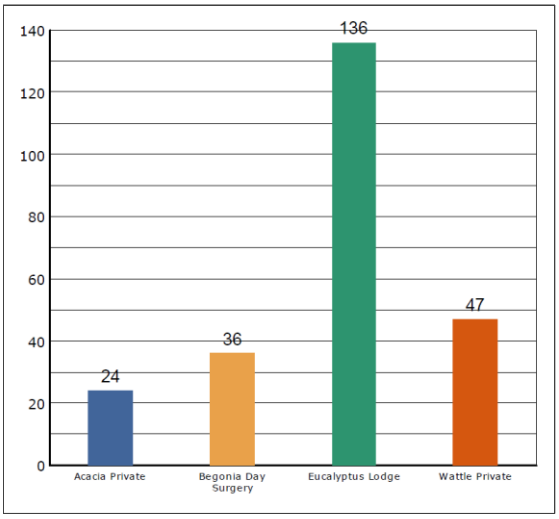
What types of charts can I generate?

The following are examples of the same data being plotted in the various chart types in qualitative reports:

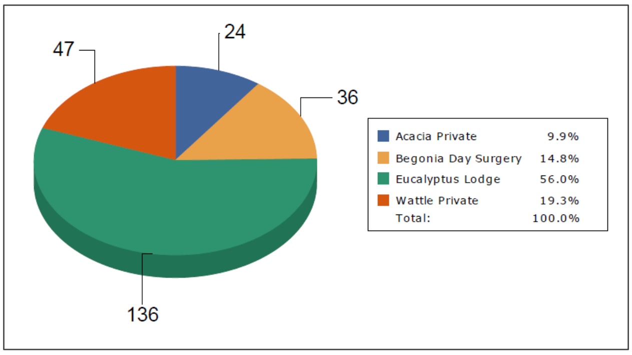
Bar (horizontal)



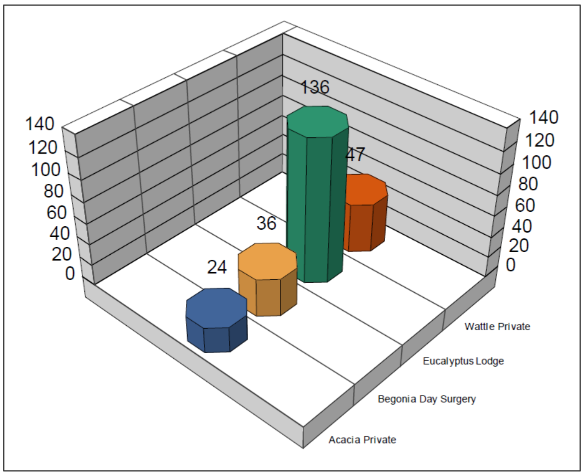
Bar (vertical)



Pie

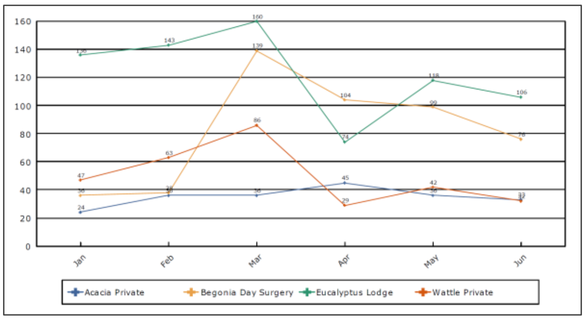


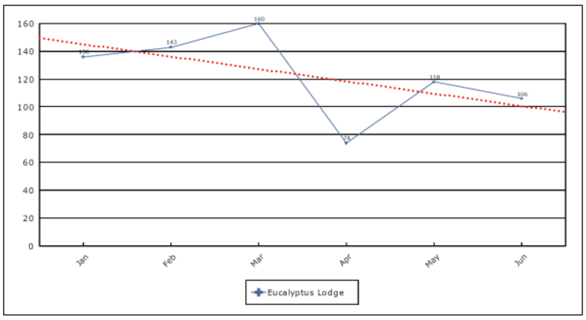
3D column



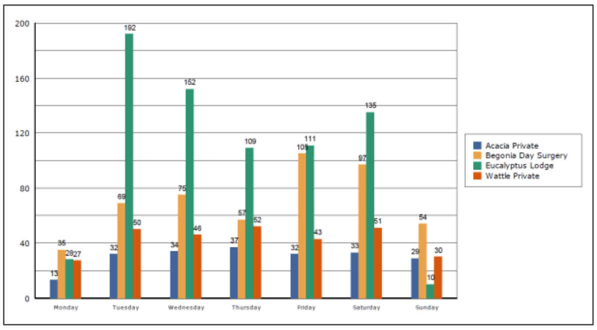
Timeline

Timeline with regression (trend) line

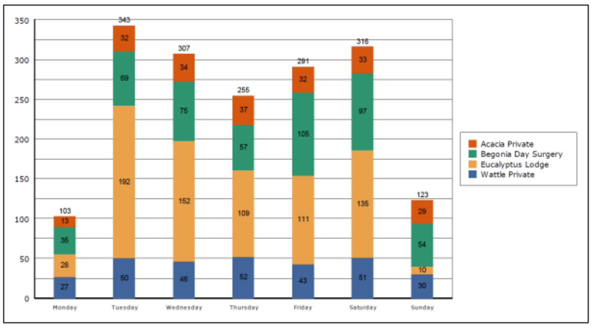




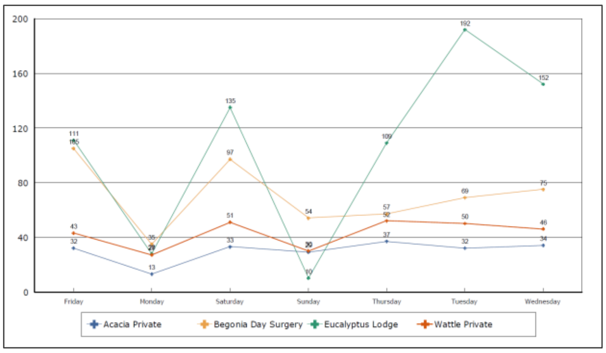
Bar side by side



Stacked bar



Line



Cross tab data table

	Friday	Monday	Saturday	Sunday	Thursday	Tuesday	Wednesday	Total
Acacia Private	32	13	33	29	37	32	34	**210**
Begonia Day	105	35	97	54	57	69	75	**492**
Eucalyptus Lodge	111	28	135	10	109	192	152	**737**
Wattle Private	43	27	51	30	52	50	46	**299**
Total	**291**	**103**	**316**	**123**	**255**	**343**	**307**	**1,738**

How to identify your report requirements

Identifying your report requirements is extremely important. You must have an idea of what you want to achieve with this report before you go to create it. This means being familiar with the dataset in your system, and understanding the needs of the audience of the report (be that you, or other people).

Before you attempt to create a report in RiskMan, it is essential to have the answer to the following questions:

What type of records am I reporting on? And...

How do I need this information to be presented? Or **What's the question I am trying to answer with this report?**

Example answers for question one:

- I need to report on **all patient falls**
- My report should only include **risks with an inherent score of extreme or major**
- I have to report on all the quality activities which are **due for completion within the next two months**
- I need a report displaying all the quality activities relating to a **particular standard**
- I need a report the shows me all **complaints** that are **not marked as closed**, and are **more than 28 days old**
- I need a report which details **staff LTIs**
- I want a summary of all the risks relating to a **particular Responsible Executive**
- I need to see all of the audits that have **outstanding actions** attached to them

This statement is critical because it will help you define what kind of **filtering** you need to apply. If you do not get your filtering correct, your report will not be accurate!

Example answers for question two:

- I need to know **how serious** the falls are
- I want to know **which Risk Categories** have the most severe risks
- I need to know **who is responsible** for these Quality Activities
- I want to know the **status** of all the quality activities related to this standard
- I need to know **where** these staff incidents are occurring
- I'd like the risks to be **grouped** based on their **risk rating**

Note that with the statements above, they are all identifying what the *key question* is that you are asking about these particular records. Most people are able to articulate that they require a patient falls report. But what do you actually want to know about the patient falls?

- How serious have they been?
- Which resulted in injuries?
- Where are they occurring?
- What time of day are they occurring?
- Which day of the week has more falls?
- What was the context of the fall?
- Which falls involved mobility aids?
- Et cetera

What we are trying to determine here is the **aggregation / grouping** for your report. Eg. Group by day, group by location, group by severity, group by hour of the day. Your chart (if required) will be <u>based on the grouping you choose</u>, and grouping is determined by the report **Layout** you choose.

What data will I see when I run a report?

The data that you see in a report is dependent on how your individual user profile has been configured. The configuration of your user profile establishes what we refer to as the User Domain – that is, all the records that you have permission to see and report on in a given register. There are many different ways a user profile can be configured; it will usually be one of the following:

- You can only report on records which match your user profile **restrictions**. For example, when you enter records, you are limited to entering for facility A only – not facilities B and C. This same restriction is enforced when you run reports – you can only see the data from facility A when you run reports, not facilities B and C.
- The only records you can see when you run a report are those where an **alert** has triggered and granted you permission.
- A combination of the above two scenarios; whereby you can report on records which match your user profile restriction, *plus* any records to which you've been granted permission via an alert.
- You have a user profile restriction that limits you to *enter* records for facility A, *however* for running reports, you are permitted to see data from facilities A *and* B, but not C. This example is not as common – where a user has wider permissions for reports than they do for data entry and management.
- You are able to report on *all* records in a given register. This is usually the case for administrators or system owners.

It should also be noted that specifically in the incident and feedback registers, records must be **posted** in order to appear in any qualitative reports you run. Occasionally, some clients opt to bypass this process. If you are unsure, please consult your system administrator.

The steps to follow to create a report

The following is a simple summary of the steps involved in creating a report:

1. **Identify your report requirements**
   - Which data are you reporting on? What is it that you need to know about that data?
   -
2. **Apply the necessary filters to your data**
   - If you don't apply the correct filter criteria, your report will not be accurate
   -
3. **Choose an appropriate layout for your report**

- If you have the permission to do so, you can create a new layout, or modify an existing one
-

4. **Run the report**
   - Check that everything is as you expect it to be. Make changes as necessary.
   -
5. **Save the report**
   - Save the report for future use. You can run it whenever you need it, or even setup schedules to make the report generate automatically (if you have the permission to do so)

Remember, a report in RiskMan is always made up of:

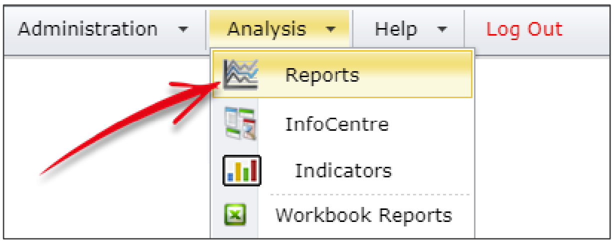
The filtering you apply
(so that only the correct records appear in the report), and

The layout that you choose
(which determines how the information is going to be presented)

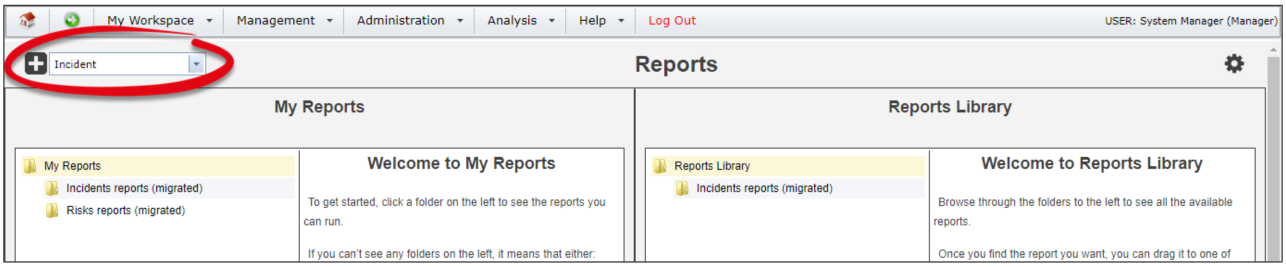
CREATING A REPORT

Where to go to create a report

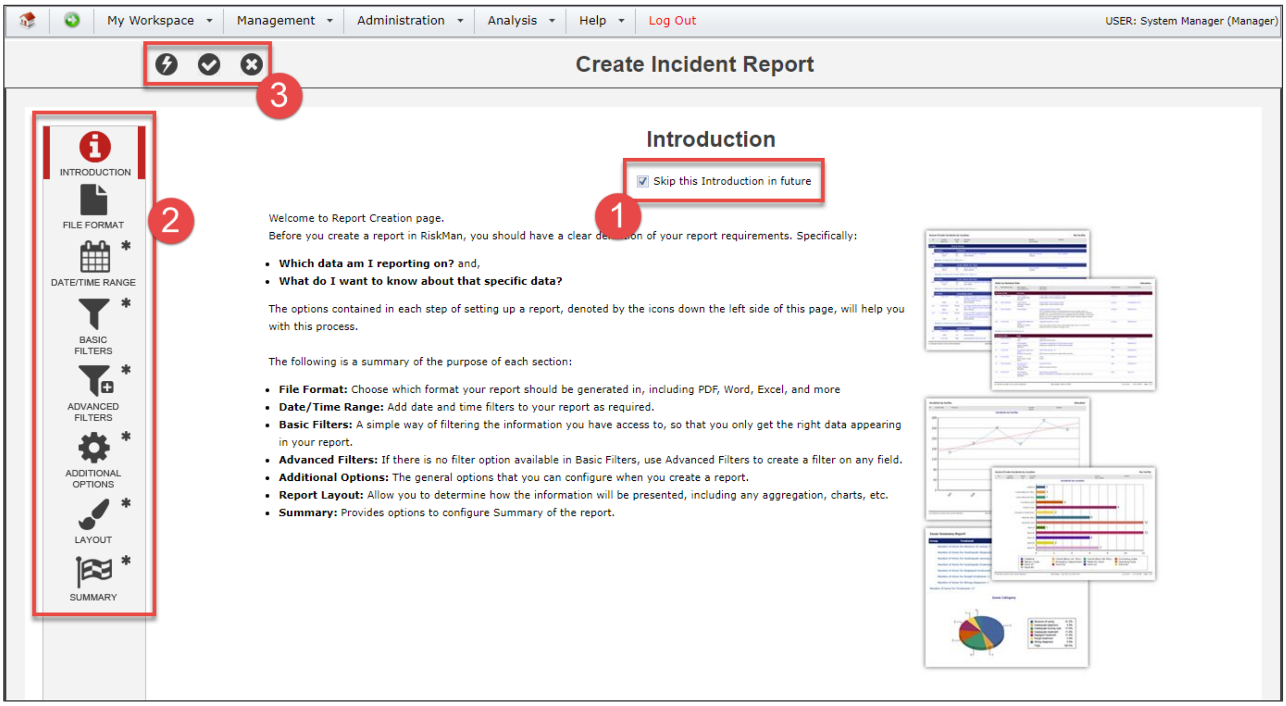
Navigate to *Analysis* > *Reports*.



Depending on the permissions you have in your user profile, the screen might look like the image here, or you might not be able to see the Library. In the top left of the page, there will be a drop down box containing the names of all the registers for which you are able to create reports. Select the desired register and click the ⊞ icon to go to the report creation page.



The report creation page



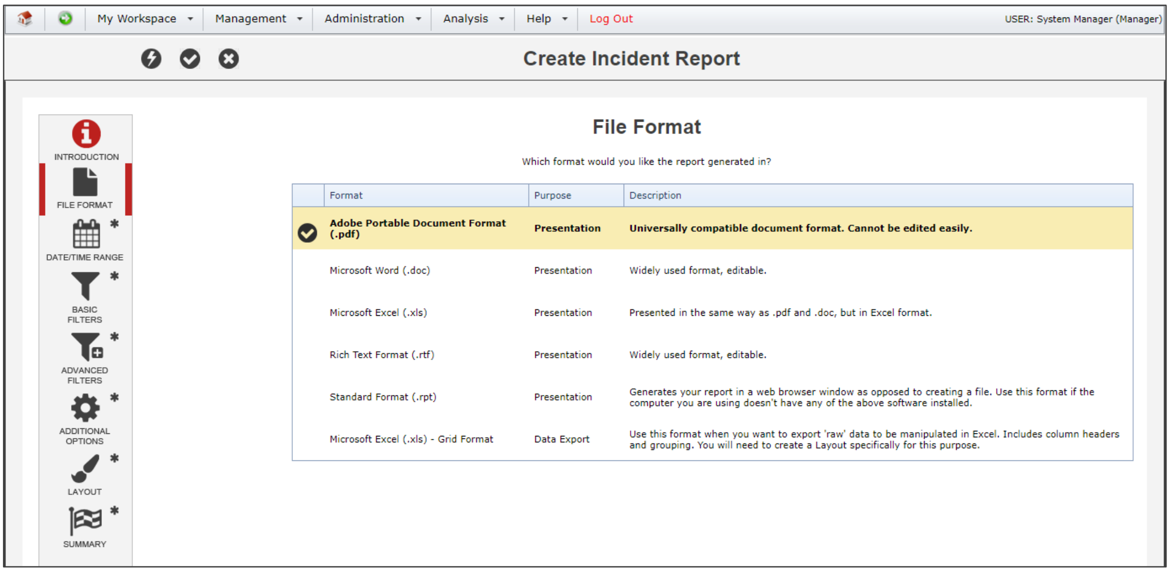
❶ When you first load the report creation page, you will land on the **Introduction**. After reading this information, note the **Skip this introduction in future** checkbox, and tick this option if you no longer need to see this information.

❷ Down the left of the page are various **Option Groups**. The idea is to visit each group and configure the available options as required for your report. An asterisk denotes you have not yet visited that option group this time round.

❸ In the toolbar are the function buttons to run the report now, save the report, and cancel & return to the previous screen.

CHOOSE THE FILE FORMAT

On the File Format option group, you can choose the type of file in which you want your report generated. In most systems the default choice is PDF. The table provides a description of each file format.



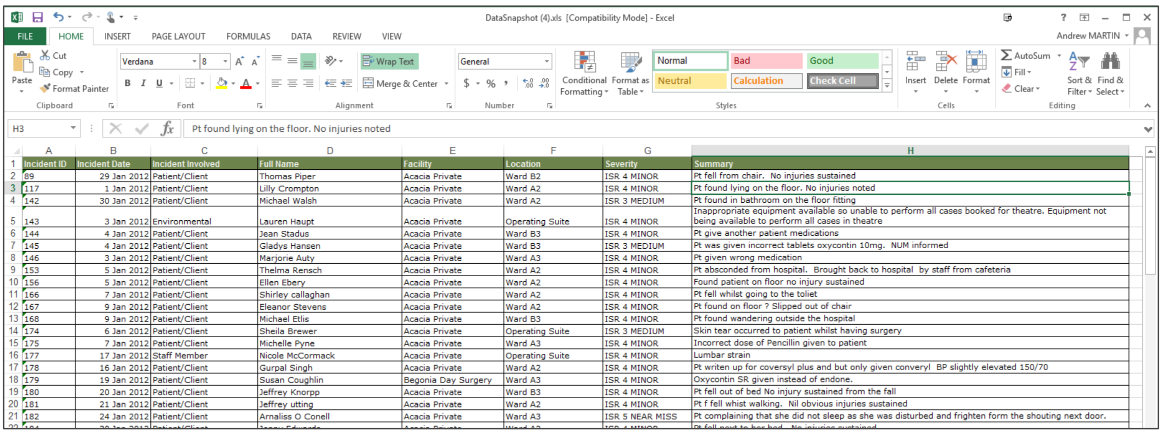
Presentation formats

These options provide you with a fully formatted presentation report, and chart if desired.

Data export format

Use this option to export your report data directly to a Microsoft Excel spreadsheet. From there you can manipulate the data as you see fit. We recommend that you create a report **Layout** for the specific purpose of exporting data. Please refer to the **Report Layout Editor** guide for more information.

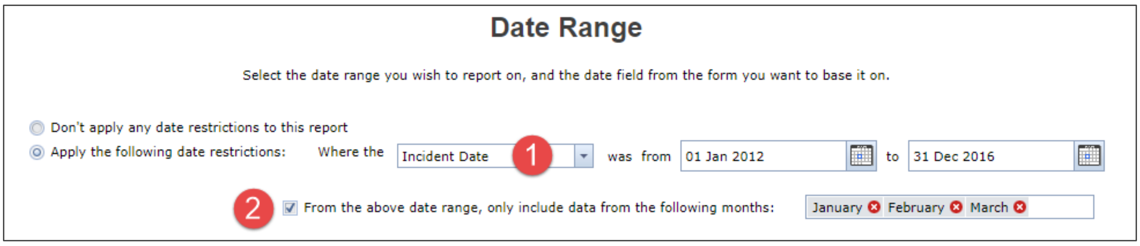
The following is an example of data exported to Excel:



DATE / TIME RANGE

Filter your records by date

The default date range is always the last full calendar month. Change the date restrictions as required. In some registers, date range filtering is often not used.



❶ Select the date field from the register that you want to base your filter on. The available fields in this drop down can be modified via *Administration > List & Codes Maintenance > ([Register name]) [Register name] Report Date Selection*

❷ This option allows you to filter for certain months from a date range that spans 2 or more years. In the example above, we've set the date range from 2012 to 2016, but from that date range, we only want the data from the first 3 months of each year.

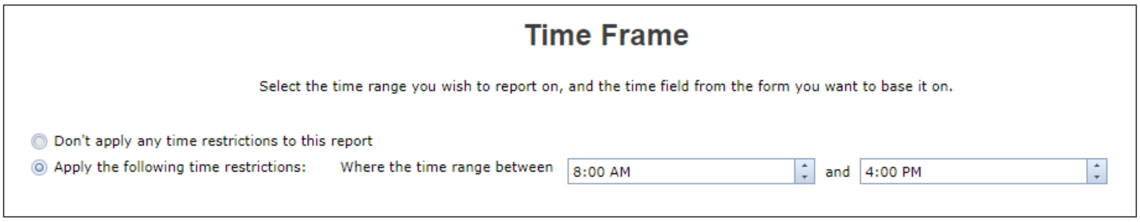
Note

Date filtering is for running your report now, and is not retained when you save your report.

Filter your records by time

In registers where it makes sense to do so (the Incident register for example), you will be able to filter records to only include those which happened in a certain time frame. The default behaviour is to not filter by time.

If you want to filter by time, type in the desired time in 12 hour format, then use the spinner button to set AM or PM.

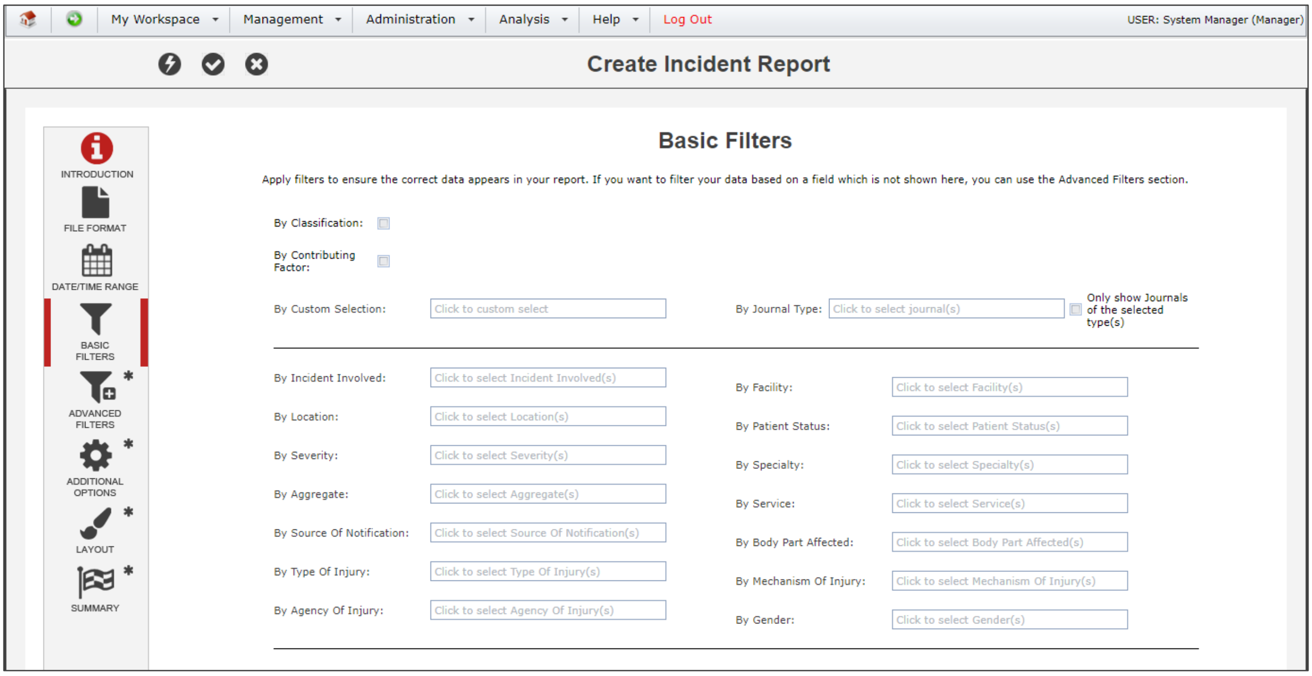


Note

For technical reasons, creating a time filter that crosses over midnight (for example, 11:00pm to 7:00am) is not possible here. If you need to filter for a time frame that crosses over midnight, it needs to be done in the Advanced Filters option group. An example is provided in this guide.

BASIC FILTERS

This is where you can start filtering your records, so that you only get the correct records appearing in your report.



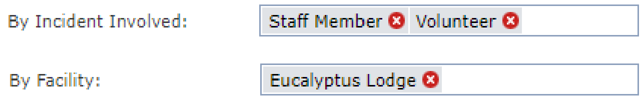
Some key points about adding basic filters:

- Selecting nothing will include everything. So, if for example you wanted data from all facilities, you do not need to go and select all facilities; it is implicit that all facilities will be included unless you say otherwise.
- Adding filters helps you to build a test. That test is then applied to every record, one at a time. If the test fails, the record will not be included in the report. If the test passes, the record will be included in the report.
    - So for example, the following filter condition:

    - Means that an incident will only appear in your report if the Incident Involved field was Staff Member.
    - In this next example:

    - Means that an incident will only appear in your report if the Incident Involved field was **either** Staff Member **or** Volunteer. So, if you select multiple values, the test between them is an OR test.

- If you filter by multiple fields, for example:

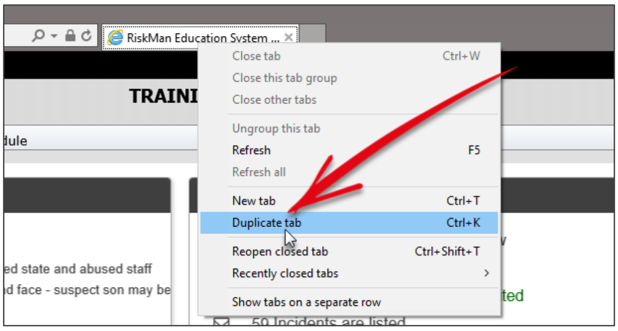


- Means that an incident will only appear in your report if the Incident Involved field was **either** Staff Member **or** Volunteer, **and** it occurred at Eucalyptus Lodge. So, when you filtering your data by more than one field, the test between those fields is an AND test.

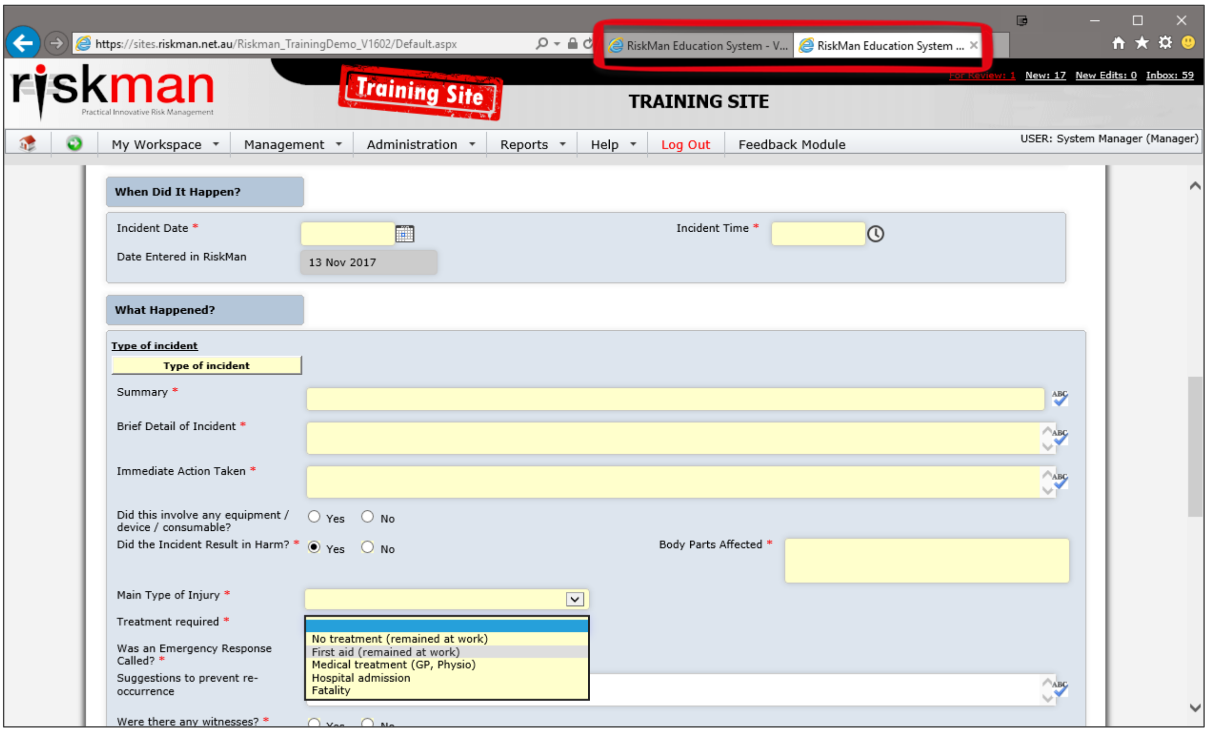
- The fields that appear in Basic Filters are the main/key fields that you are likely to need. The fields that are shown here can be controlled by navigating to *Administration > List & Codes Maintenance > ([Register name]) [Register name] Report Filter Options*.

Tip

While you are still getting used to your dataset, it can be a good idea to look at the actual form to find the fields you wish to filter by, and the values you wish to filter for. The easiest way to do this is to right-click the browser tab and select "Duplicate", or similar:



This way, you can have one tab with the report creation page open, and the other tab with the form in question open, which should help you find the fields you need more quickly:



Filtering by custom selection

Sometimes you will have filter criteria where it isn't possible to reproduce using basic or advanced filters. In many cases, the system can support all kinds of special filter criteria via the **By Custom Selection** box.

For example, in a feedback register, you might want to have a filter that only includes complaints that are still open and are more than 30 days old. Though this is not possible via the general user interface, RiskMan Support can assist you in adding this special filter criteria as an option in the By Custom Selection box.

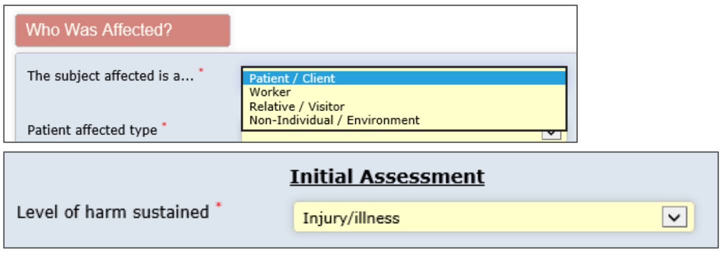
The content of the By Custom Selection box is available by navigating to *Administration > List & Codes Maintenance > ([Register name]) Custom (Register name) Report Selection.*

ADVANCED FILTERS

If the field you want to filter by is not available as a basic filter, or if you need to do any filtering greater than just “and/or”, you can add **advanced filters**.

For the purpose of explaining how advanced filters work, let’s assume that the report we are creating is for worker injuries.

You must always carefully consider which information would need to be in place on the respective data entry form that would count it as a record you want included in your report. Again, we’d recommend opening a blank incident entry form to assist identifying which fields will need to be tested. In the case of our example, we’ve decided we’ll need to create conditions for two fields:

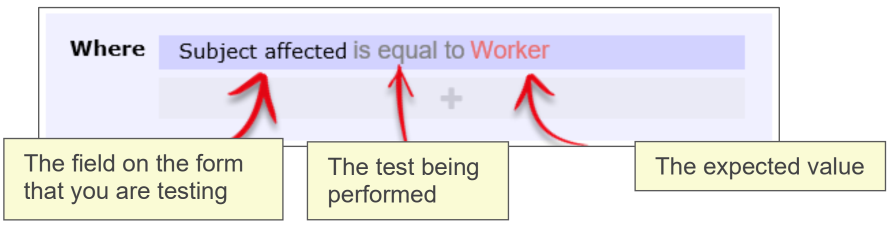


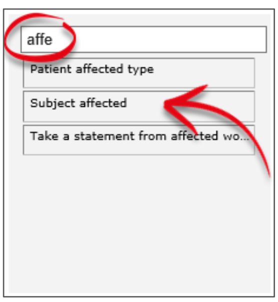
We want to test that the subject affected was a **Worker**, and that the level of harm sustained was **Injury/illness**.

We need to create a condition for each of those fields.

Adding conditions

Conditions work like this:

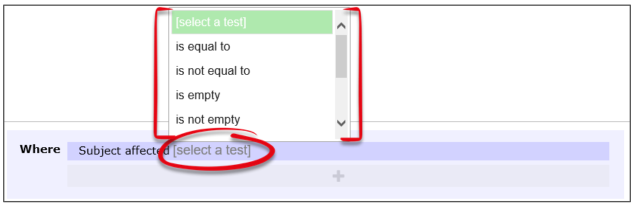




Once you have identified the name of the field you need to test, start typing that field name in the filter box. The list of fields will show the fields that match what you type.

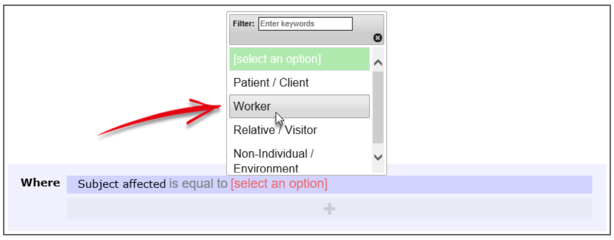
Once you find the field you need, click and drag it to the **drop zone**:

Once you have the added the field in the drop zone, you need to select the type of test you need to perform:

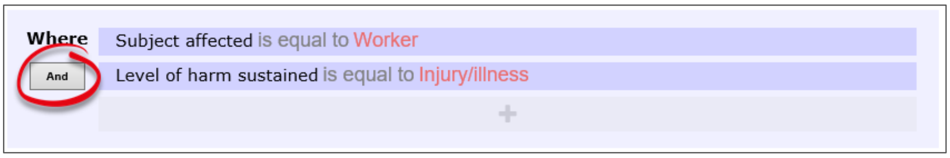


Then you need to select the value that you want for your test. Click **select an option**:

The values from the field you have selected will appear. Choose the value you are testing for (**Worker** in our case):



We then have to add our second condition. Follow the same process to find the field you need to test:



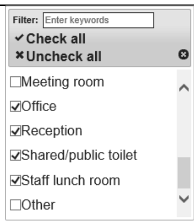
Note that for each subsequent field you add as a condition, there is a button at the start of each which contains **And** and **Or** (highlighted above). This allows you to stipulate whether both conditions need to be met in order for a record to be included, or if either of those conditions can allow a record to be included (click the button to change between **And** and **Or**).

So, for our example, a record will only be included in our report if the subject affected was a **Worker**, and the level of harm sustained was **Injury/Illness**.

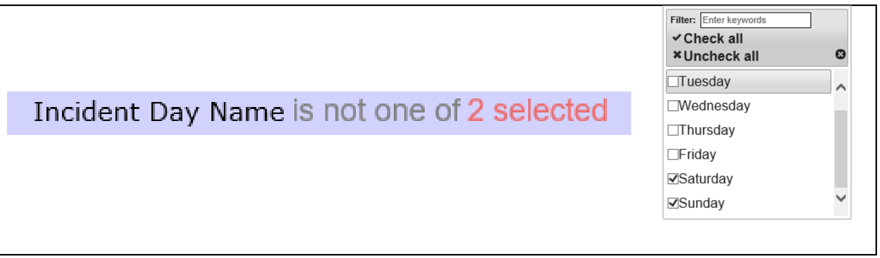
What types of tests can be conducted?

Test name	Description
Is equal to	You want the stated value to be in this field
Is not equal to	You do not want the stated value to be in this field, but any other value is fine
Is empty	The field you are testing contains no data
Is not empty	The field you are testing does contain data
Contains the keyword	The field you are testing contains a keyword or particular string of text
Does not contain the keyword	The field you are testing does not contain a keyword or particular string of text
Is one of	More than one value being present in this field could satisfy this test
Is not one of	Any of these values not being present in this field could satisfy this test
Is less than	Can only be used on date, time, and numeric fields
Is greater than	Can only be used on date, time, and numeric fields
Is less than or equal to	Can only be used on date, time, and numeric fields
Is greater than or equal to	Can only be used on date, time, and numeric fields

Test examples

Is equal to	Incident Day Name is equal to Monday
Is not equal to	Specific location is not equal to Car park
Is empty	Closed on is empty
Is not empty	Date of birth is not empty
Contains the keyword	Action taken at time contains the keyword police
Does not contain the keyword	Occupation does not contain the keyword nurse
Is one of	Specific location is one of 4 selected 

Is not one of

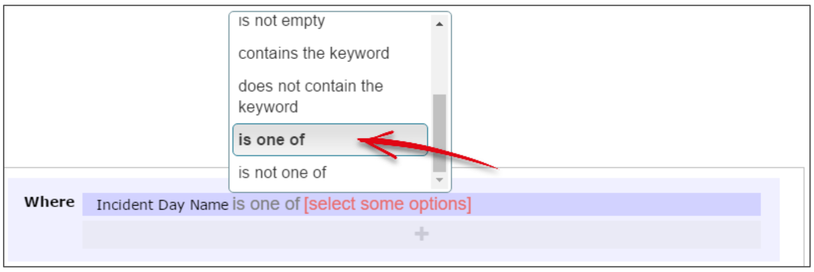


Multi-test conditions

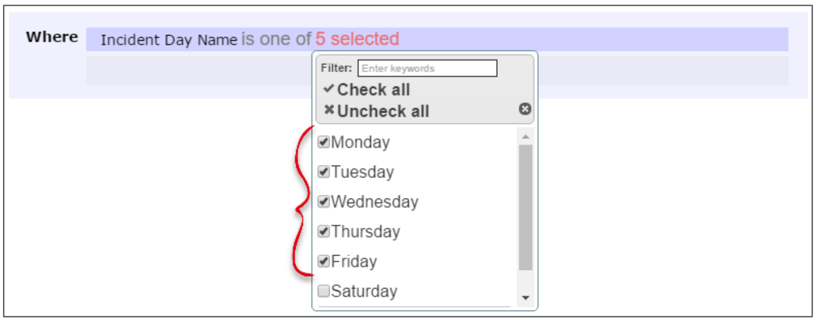
There will be times where you want to create conditions with more than one test. There are two main scenarios:

- Your condition tests one field for more than one possible value
- Your condition comprises of two or more different fields being tested

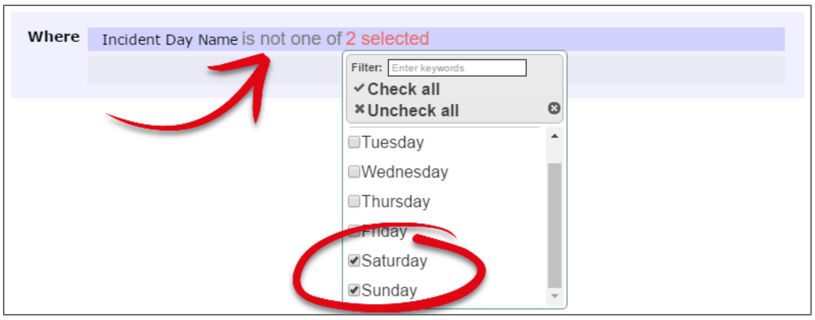
Testing **one field for more than one possible value** is straightforward. Select the field you wish to test, add it to the drop zone, and change the test type to **is one of**:



You can then go and select multiple values from the list:

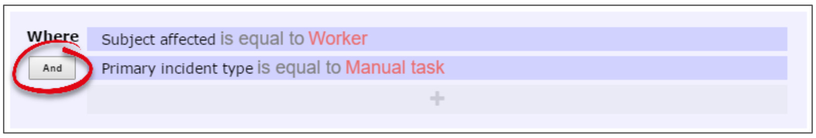


If you wanted to achieve the opposite, you could use the **is not one of** test (usually because it's more efficient):



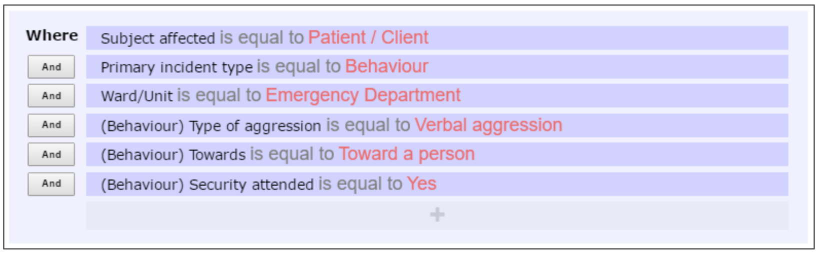
When your condition requires the **testing of two or more fields**, there are two distinct scenarios. The first is when that condition is the only one you require for your report filter purposes.

Use the **And/Or** button to determine whether all tests must be passed, or whether just one could satisfy the condition:



In the above example, we've chosen **And** to ensure that a record will not be counted unless both of the tests we have added are passed.

In a lengthier example, we have said that a record should only be counted if all of these tests are passed:



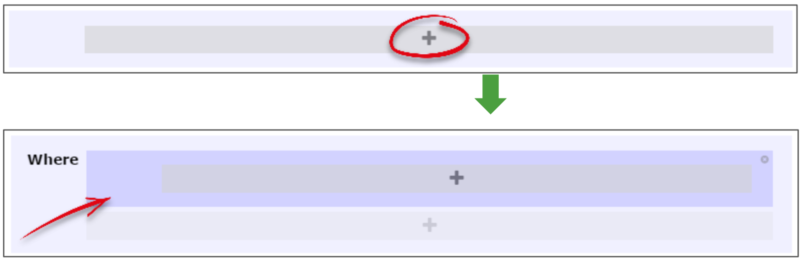
But what if we wanted a record to be counted based on two *unrelated* conditions, and each of these conditions tested multiple fields?

Let's use the following example: We want records to be counted if they were **either**:

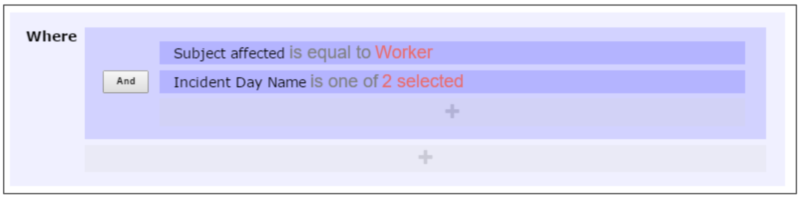
- Worker incidents that happened on Saturdays and Sundays, OR
- Relative/Visitor incidents that happened in the Emergency Department

We have two distinct sets of conditions there; each condition has its own sub-tests.

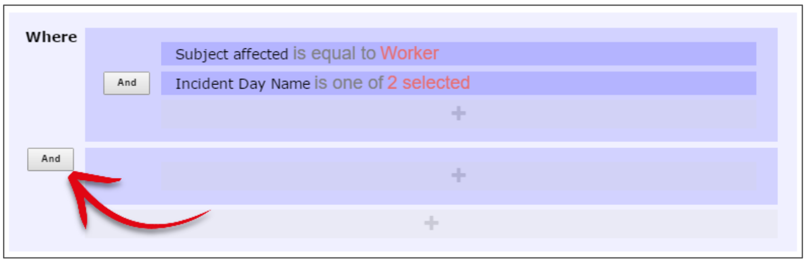
In this situation, you need to create two separate conditions in the drop zone. Click the  button in the drop zone to do this:



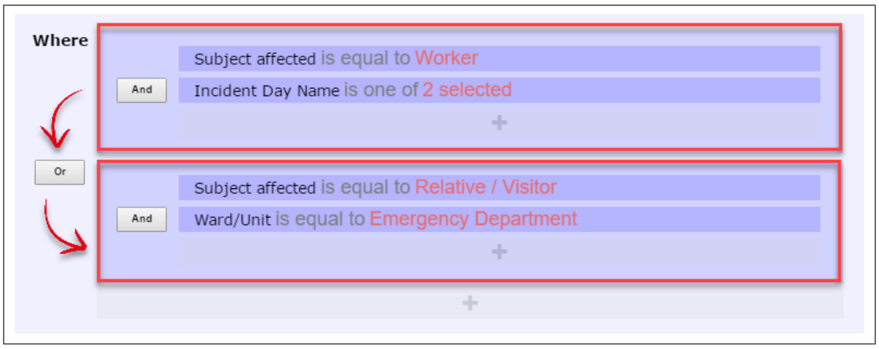
Note the new darker-blue box, with its own additional drop zone. This is where you can go and add the tests which make up the first condition listed above in our example:



You can now click the outer-most drop zone to add a second distinct condition. Note the new **And/Or** button:



Once we add in the tests required for our second, unrelated condition, it looks like this:

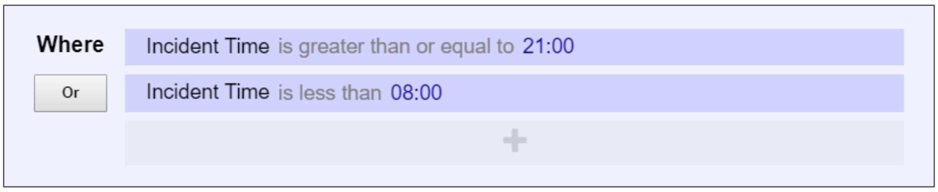


The image above uses red boxes to illustrate that there are 2 completely separate conditions for this report; each condition has several tests which must be met before a record would be counted.

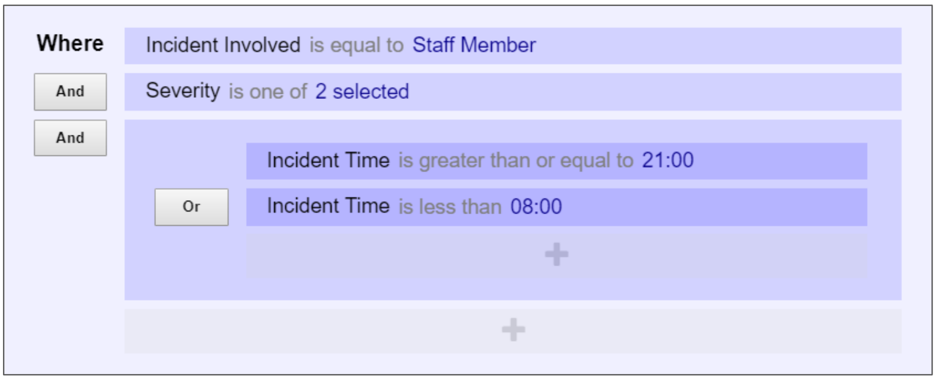
Creating a time filter that crosses midnight

Earlier in this guide, it was mentioned that in the Date/Time Range options group, you could not create a filter for a time range that crossed midnight.

The following is an example of an advanced filter that crosses midnight:

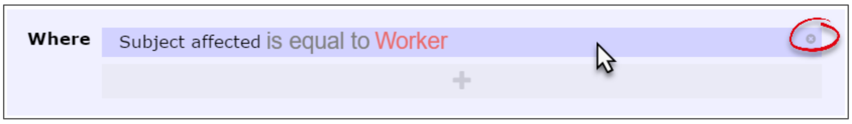


Or, when you have additional filter criteria for your report:



Deleting tests

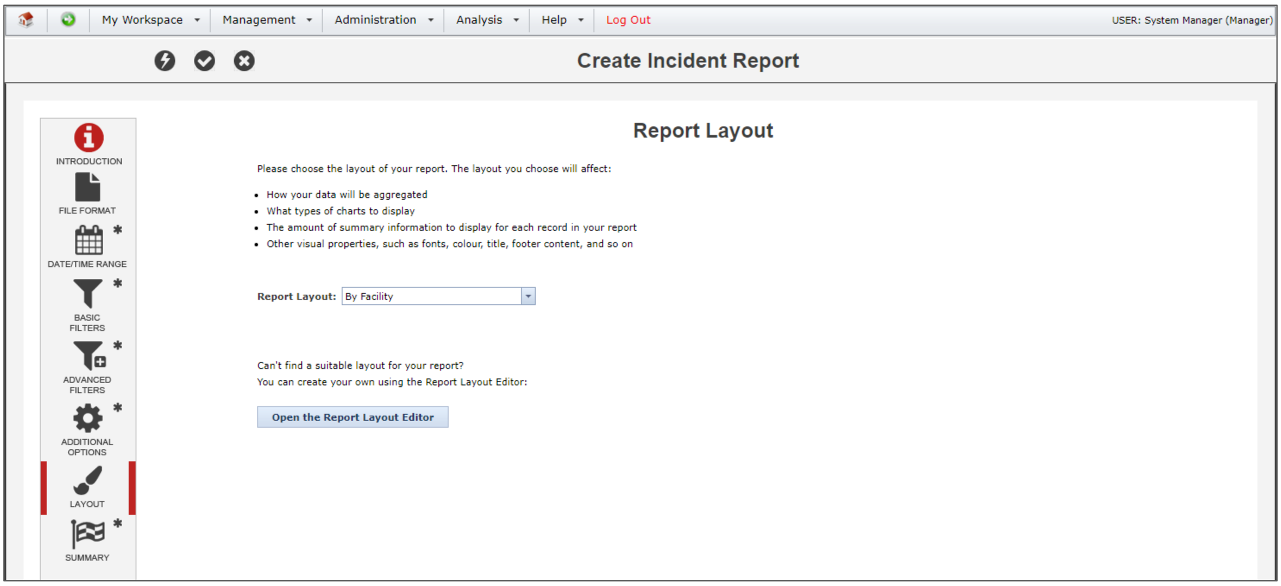
Deleting tests is simple. When you hover your mouse over any test, you will note the ✕ icon at the end of the row:



Click the ✕ icon to delete the test. You will not be prompted to confirm this action.

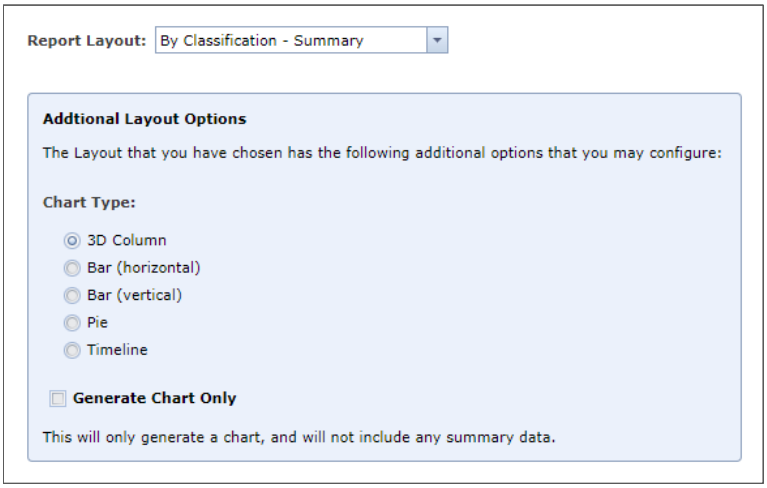
CHOOSE A REPORT LAYOUT

You will need to select an appropriate layout for the purpose of your report. Remember, the layout is connected to the question "What do you need to know about that data?", as the layout controls the way the data is to be aggregated, along with all the other visual properties of the report.



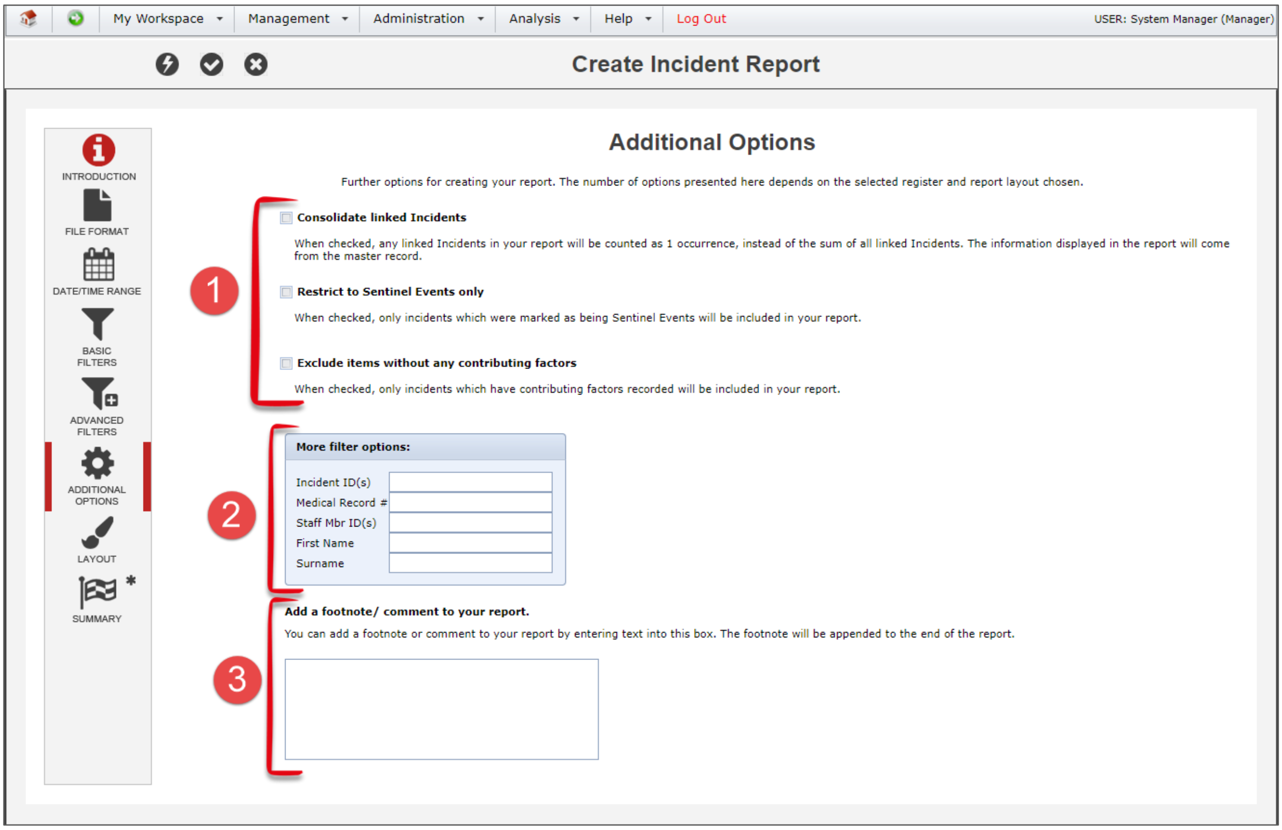
If you have the permission to do so, you can use the **Report Layout Editor** to create a new layout, or edit an existing one. Please refer to the **Report Layout Editor guide** for instructions on how this works.

Some report layouts are "hard-coded", and cannot be modified. Some of these layouts have some extra options that you can configure; the following is an example of such options:



ADDITIONAL OPTIONS

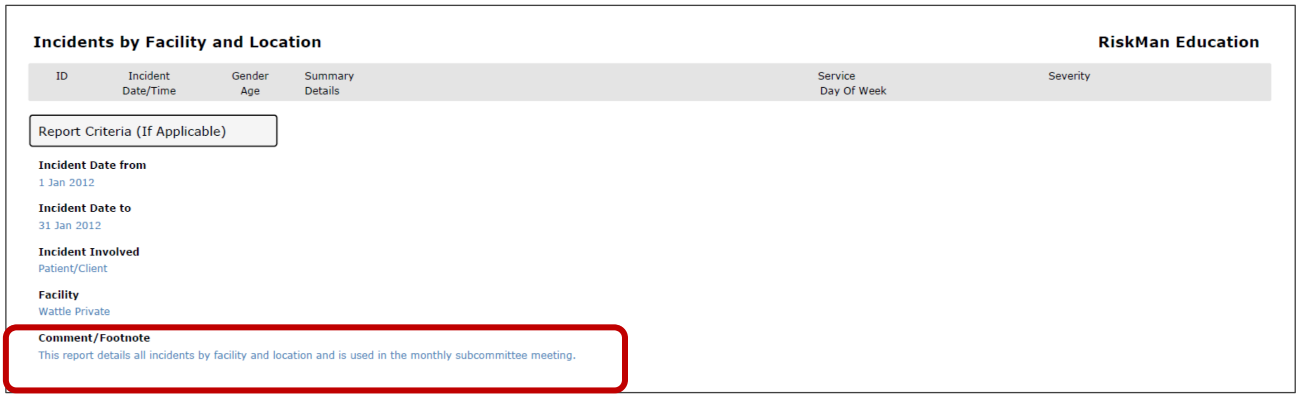
Various extra report options are available depending on the register your report based on, and the layout you choose.



❶ Further report options will be displayed here. Each has an explanation, and the options that you see are dependent on your system configuration, and the register in question.

❷ More filter options are available here, and the filter options displayed depend on the register the report based on. If you want to filter the report to include certain record IDs, please make sure you enter the IDs separated with a comma, and no spaces, e.g. 155,158,164,177,191 etc

❸ This is where you can enter a comment or footnote for the report. The text entered here will appear at the end of the report, with the report criteria:



Incidents by Facility and Location **RiskMan Education**

ID	Incident Date/Time	Gender Age	Summary Details	Service Day Of Week	Severity

Report Criteria (If Applicable)

Incident Date from
1 Jan 2012

Incident Date to
31 Jan 2012

Incident Involved
Patient/Client

Facility
Wattle Private

Comment/Footnote
This report details all incidents by facility and location and is used in the monthly subcommittee meeting.

RUN THE REPORT

Once you have applied all the necessary settings, you can run your report. To do so, click the run icon in the toolbar.

The time taken for your report to run is dependent on many different factors, including:

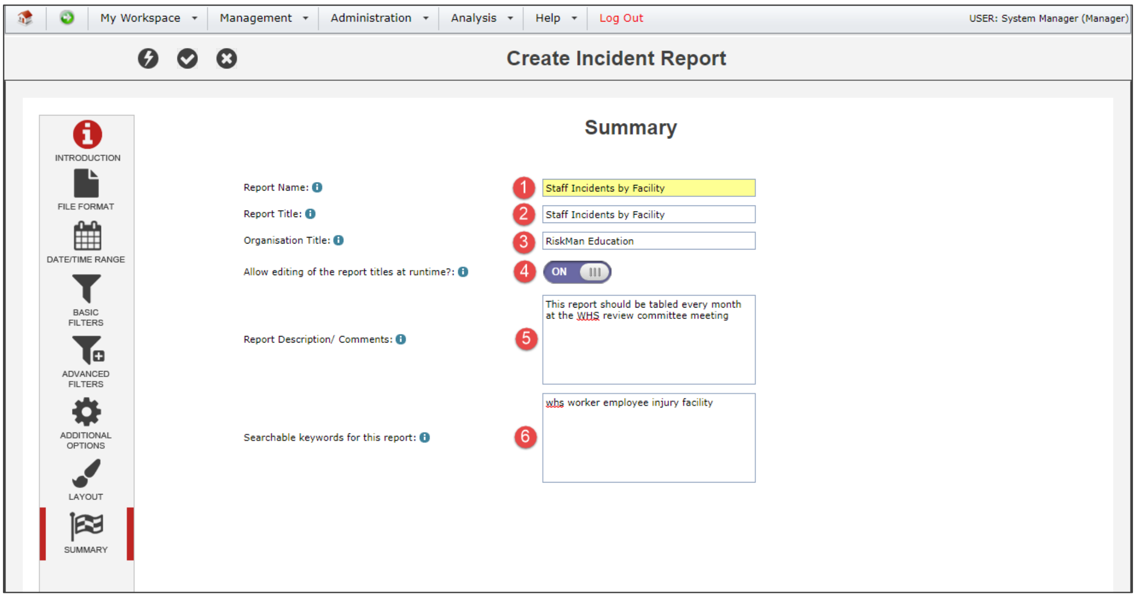
- The complexity of your report. Remember, the more information you request to be brought back in a report, the longer it will take to run.
- The demand on the server at any given time. This means that in some situations, due to the sheer number of users accessing the system, your report could take a little longer to run.

Note

If the browser you are using has a pop-up blocker function, this might prevent your report from appearing. You may need to consult your internal IT department for help resolving this.

SAVE THE REPORT

Once you have your report configured correctly, you can then save it for future use. The first step is to go to the **Summary** options group:



❶ The **Report Name** is the name you will see in your list of saved reports.

❷ The **Report Title** is the title that appears in the top left corner of every page in the generated report. More often than not, the Report Name and Report Title will be the same.

❸ The **Organisation Title** is the title that appears in the top right corner of every page in the generated report. The organisation name of your RiskMan system is the default value.

❹ You have the option to allow the **Report** and **Organisation Titles** to be modified when the report is run. This can be useful to contextualise each edition of the report – for example, the default Report Title might be “Staff Incidents by Facility”, but when you run the report you change it to read “Staff Incidents by Facility – September 2017”. This option is set **on** by default.

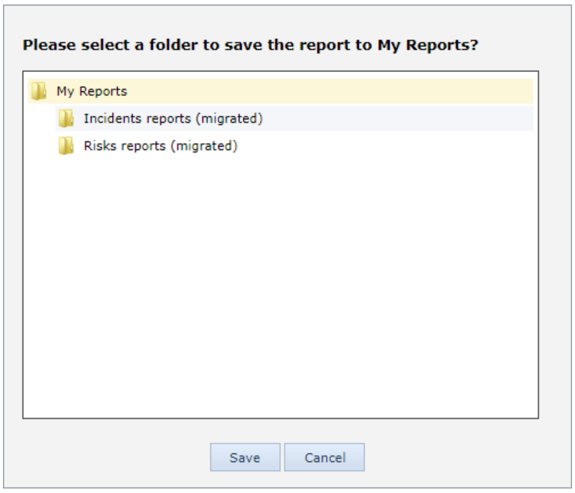
❺ Add a meaningful **Report Description** or **Comments**. It should be clear enough that anybody would know exactly what this report is for and what it contains *without having to run the report*.

❻ When browsing through your saved reports, there is also a search function. Add some useful **keywords**, related to the purpose/content of the report, which would make it quicker to find.

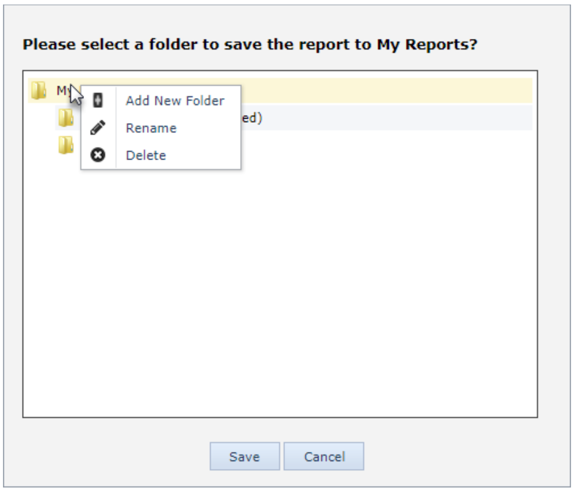
You can now save your report. To do so, click the save icon ✔ in the toolbar. What you see next depends on your individual user permissions.

- **If you only have permission to save to My Reports (or your organisation has not elected to use the Report Library)**

You will see your My Reports folder structure:



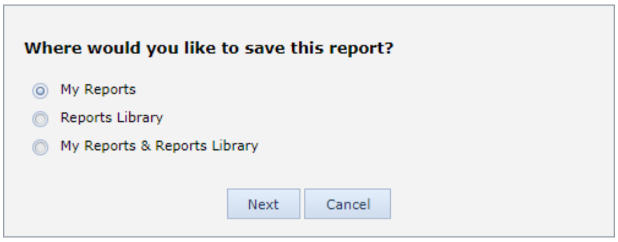
Select your desired folder, or create a new folder if required by right-clicking an existing folder:



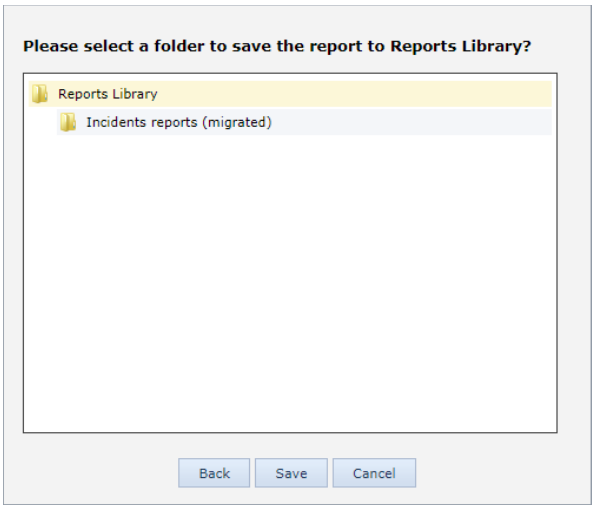
Give the new folder a name and press **enter**. Select the new folder by clicking it, and click the **Save** button. Once the report saves, you will be taken back to the Reports page.

- **If you do have permission to save reports to the Report Library**

  You will need to choose where you want to save this report – My Reports, the Report Library, or both:



  If you choose to save to both My Reports *and* the Report Library, you will first go through the steps on the previous page to save the report in your My Reports folders. Then you will be prompted where you want to save the report in the Report Library:

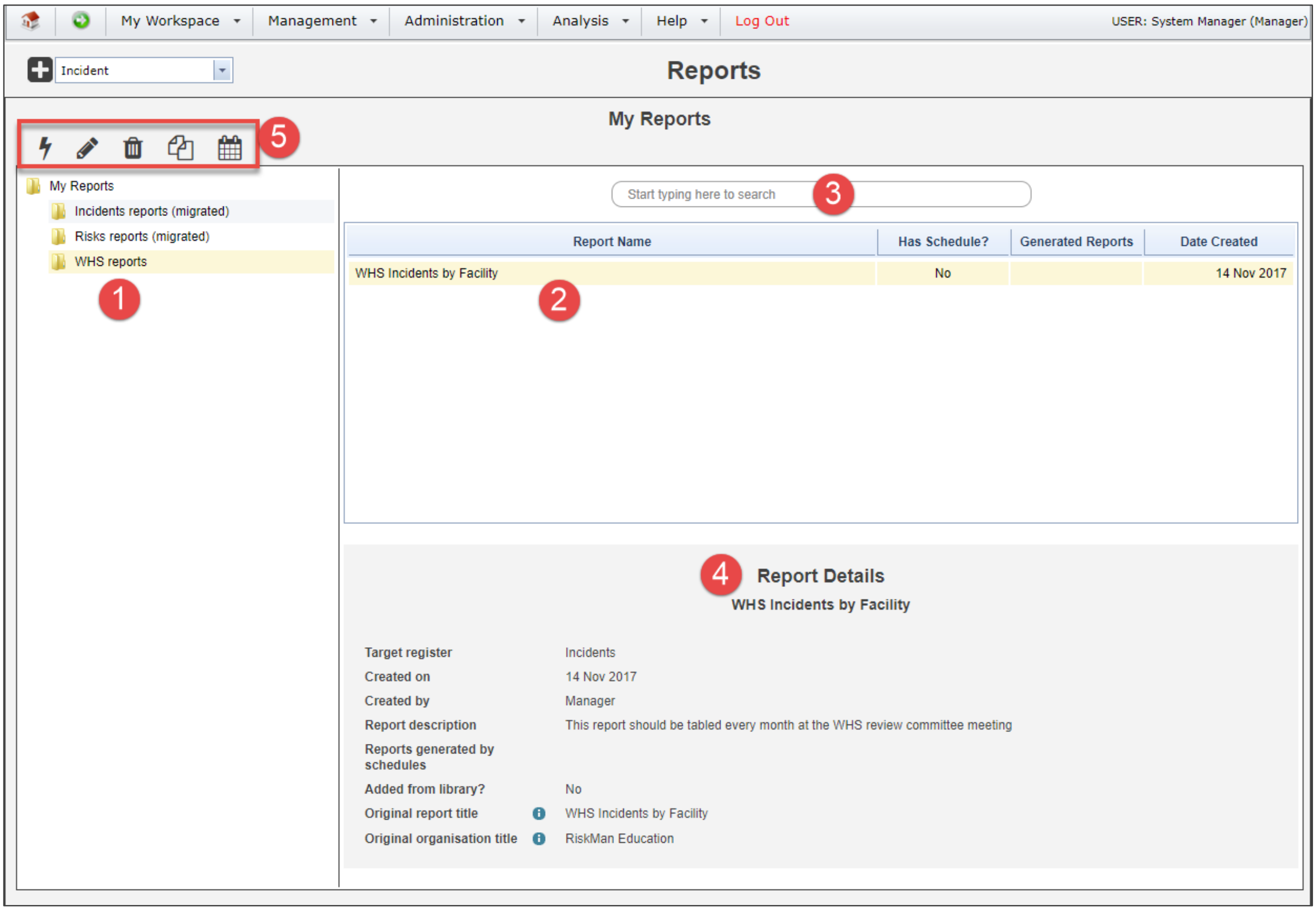


  The same functionality applies as before; select an appropriate folder, or create a new one as required.

  Once you have selected the desired folder, click the **Save** button. Once your report saves, you will be taken back to the Reports page.

WORKING WITH EXISTING REPORTS

The My Reports interface



❶ **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.

❷ **Report list:** When you select a folder, the reports saved in that folder are displayed here.

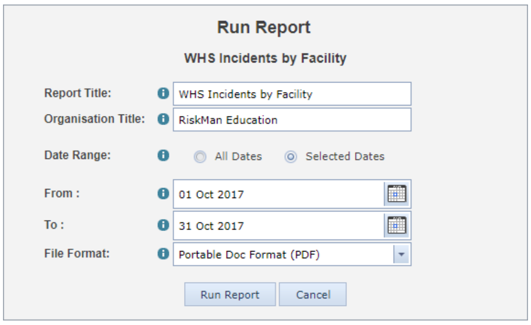
❸ **Search this folder:** You can also search for reports from the current folder by name, description, and keywords. Start typing your search term and any matching reports will appear in the report list.

❹ **Report details:** This is the information we entered in the **Summary** option group when the report was created.

❺ **Report functions**: When you select a report, the available functions will appear, based on your individual user permissions. Each function is described on the following pages.

Run a My Report

To run the selected report now, click the Run icon. You will see the following dialog:



All you need to do now is:

- Modify the Report and Organisation Titles as desired (if the option was enabled when the report was saved)
- Select the required date range for the report
- Choose the format in which you want the report generated

Edit a My Report

To edit the selected report, click the Edit icon. Make any changes required and save your report in the usual way.

Delete a My Report

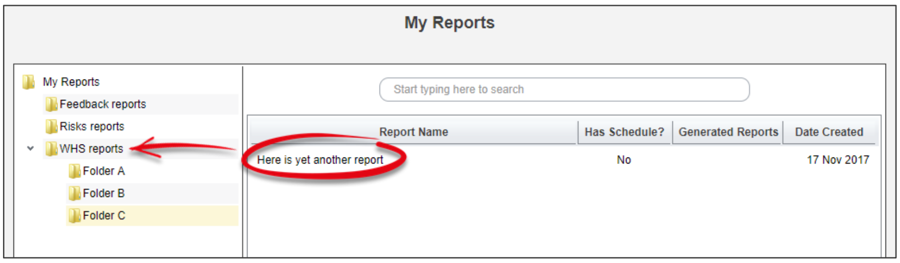
To delete the selected report, click the Delete icon. You will be asked to confirm this action. Please note that deleted reports cannot be recovered, so be careful! Also, if you delete a report from a folder you have shared with other users, they will not be able to see that report anymore either.

Clone a My Report

To clone the selected report, click the Clone icon. This makes a copy of the report in the current folder. From there you can edit the cloned report as required. This can be a great time saver if you wish to have several similar reports.

Moving reports between folders

To move a report between folders, simply click and drag the report to the desired folder:

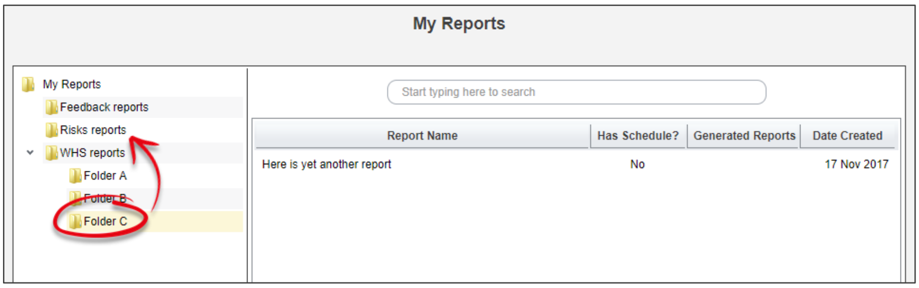


A green arrow appears over the target folder; release your mouse button when your cursor is over the desired folder:

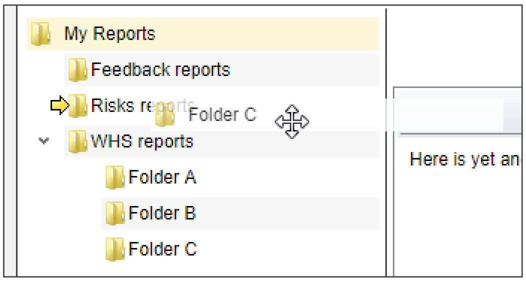
You can only move reports between folders you have created yourself, or folders where you have the Read / Write / Maintain permission – this applies to both the destination folder, and the folder of the report being moved.

Moving folders to a new location

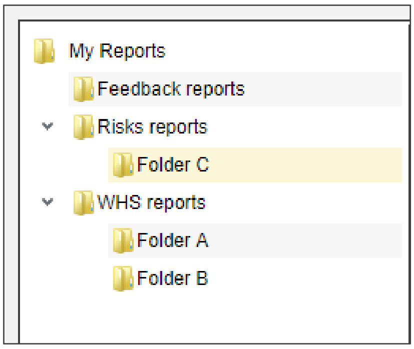
Folders can also be dragged and dropped to arrange them the way you want:



A green arrow appears over the target folder; release your mouse button when your cursor is over the desired folder:



The end result:

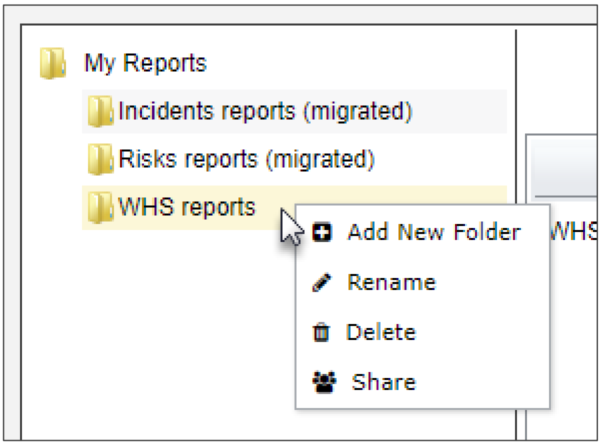


You can only move folders you have created yourself, or folders where you have the Read / Write / Maintain permission – this applies to both the destination folder, and the folder being moved.

Share a My Report folder with other people

If you have the permission to do so, you can share folders from your My Reports with other people.

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

Here's what each level of permission means:

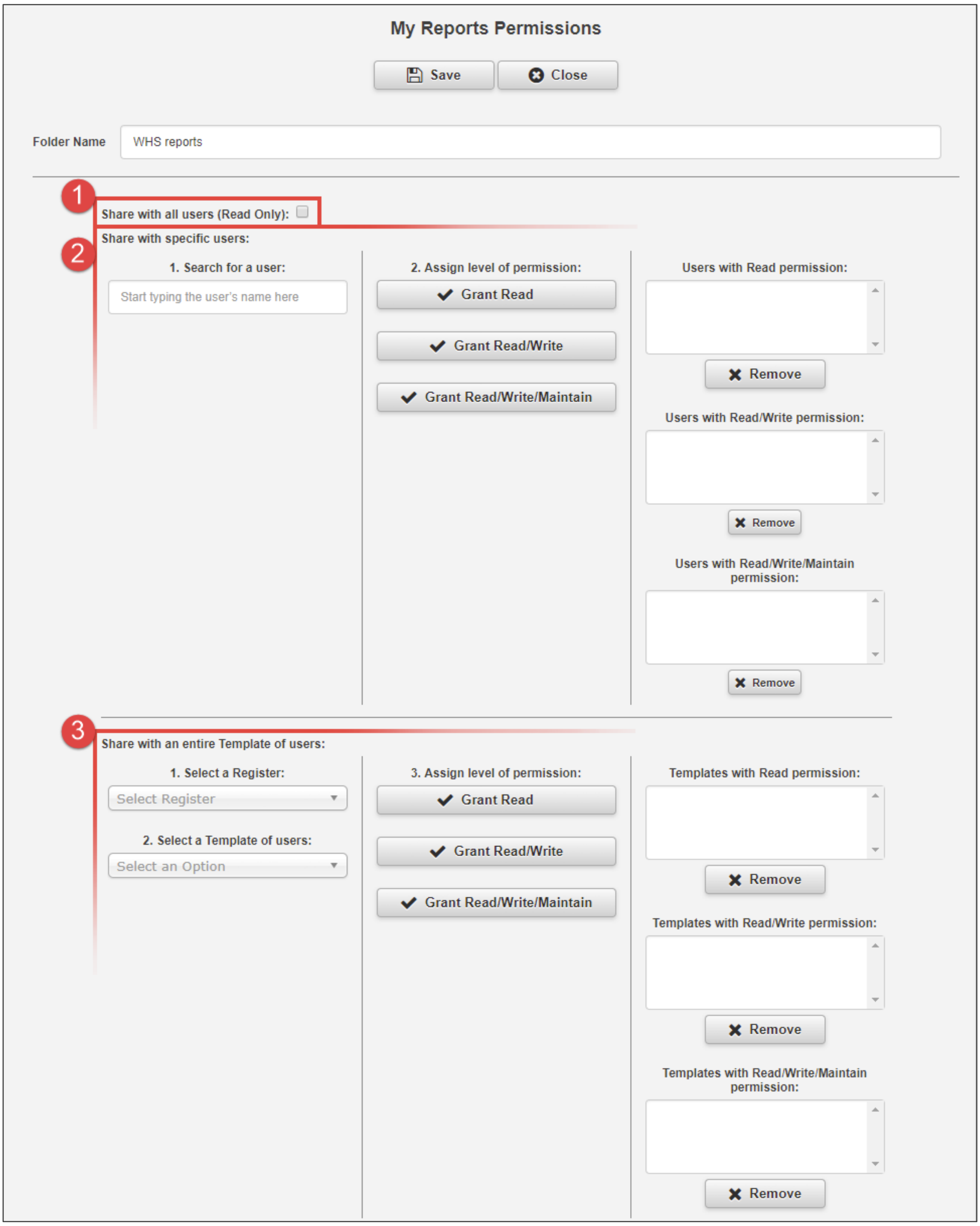
PERMISSION	WHAT CAN THE USER DO?
Read	The user can see and run all the reports in the folder. They cannot add reports to the folder.
Read / Write	The user can see and run all the reports in the folder. They can add reports to the folder (provided they have the user permission to save reports).
Read / 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



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 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.

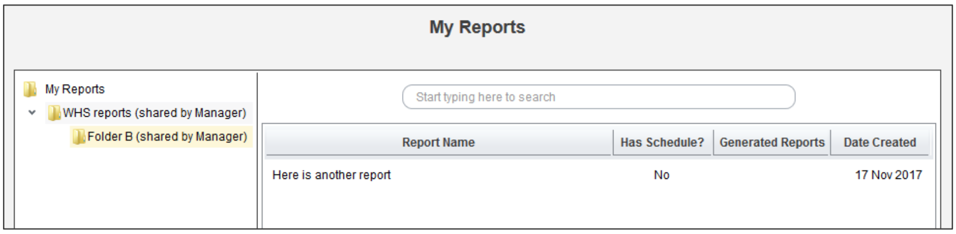
❸ **Share with entire Template of users:** Select the register which contains the template of users to whom you want to grant permission, then select the desired template from the second drop down box. When you find the desired template, grant it the level of permission you want it to have. The template 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.

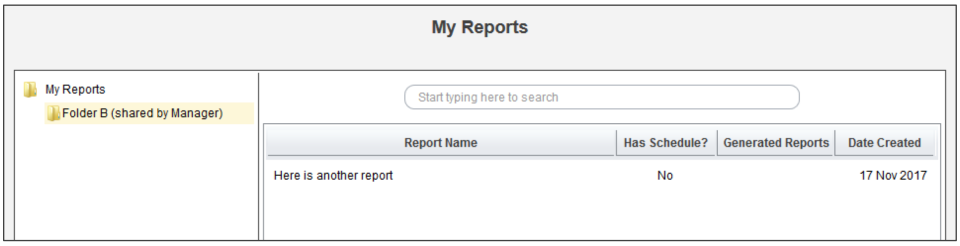
Let's look at the following folder structure example:

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:

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:



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:



Creating Reports

RELATED TOPICS

Report Layout Editor

Report Schedules

Report Library