

Workbook Reports

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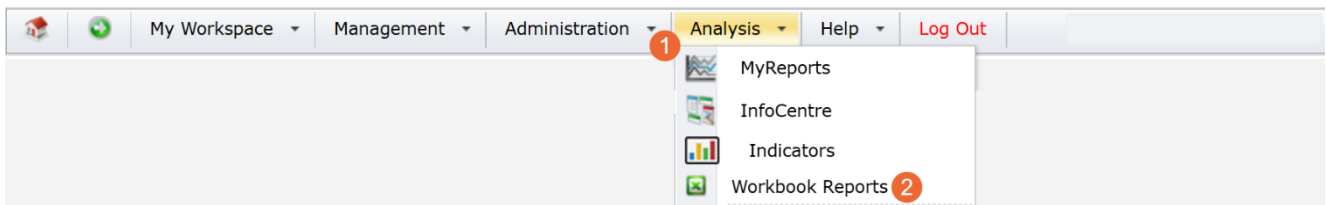
Foreword

The Workbook Reports feature is designed to support customised reporting requirements. It enables users to generate reports directly from RiskMan data and present them in a spreadsheet, retaining specific formatting of the organisation. These spreadsheets retain full Microsoft Excel functionality, including formatting, formulas, charts, and drawings. Access to the tool is permission-based, ensuring controlled and secure usage.

Workbook Reports have been developed to deliver pre-formatted reports that may not be readily available through standard RiskMan reporting functions.

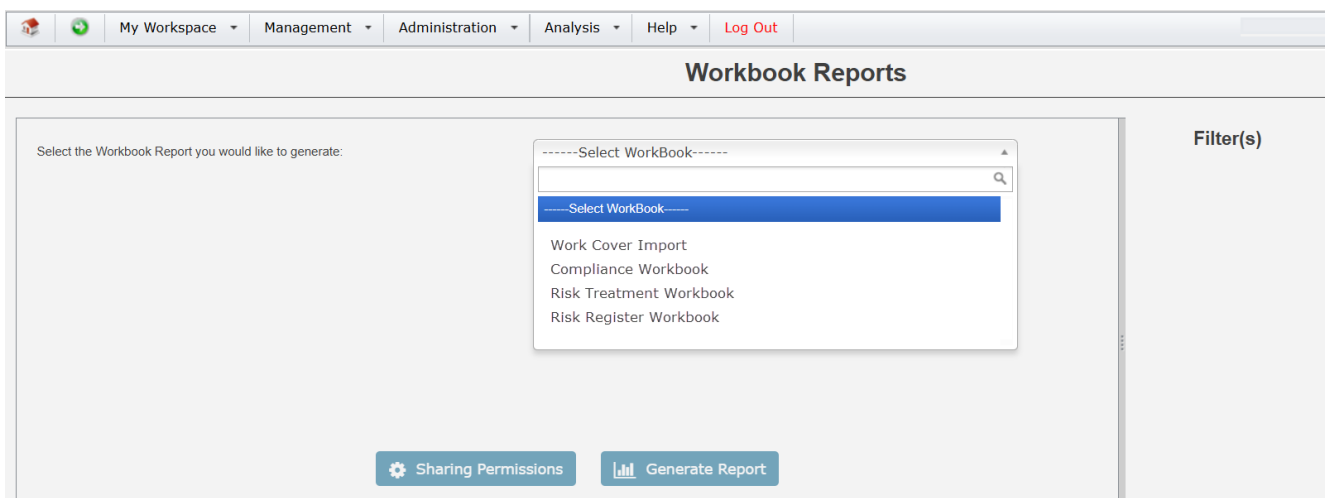
Accessing Workbook Reports

If you have access to Workbook reports, navigate to **Analysis > Workbook Reports**



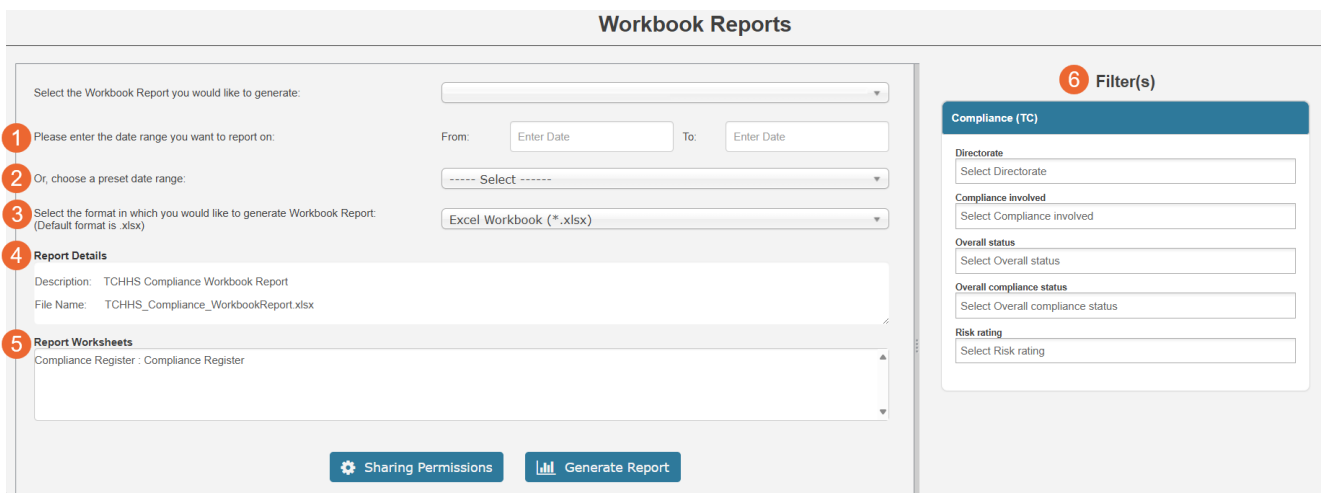
Generating Workbook Reports

If a user has permission to access a Workbook Report, it will appear in the **Select the Workbook Report you would like to generate** drop-down list. Since these reports are already pre-formatted, the only action required is to apply filters to determine which data will be displayed in the report.



When a report is selected from the list, its details are displayed along with the available filtering options for the Workbook Report.

1. **Please enter the date range you want to report on:** Enter a date range by clicking on the **From** and **To** fields and selecting a date from the date picker
2. **Or, chose a preset date range:** Alternatively, select a preset date range. Upon selection from this list the system will use the current system date and calculate the values for the **From** and **To** date fields
3. **Select the format in which you would like to generate Workbook Report: (Default format is .xlsx):** Select the appropriate Excel format for your Workbook Report. The recommended output is the default of **xlsx - csv** as other may only give the first tab of any workbook
4. **Report Details:** Shows information about the report file, its description and Filename
5. **Report Worksheets:** These are all the worksheets present in the selected workbook. There may be other worksheets present in the original file, but the system displays only those which have any data retrieving data associated to them
6. **Filters:** To filter an item, the value can either be selected from the list or by clicking into the textbox to type in the filter text box. The values in the filter list will automatically narrow down according to the typed in value. Once the filtering criteria is set the report can be generated using the
7. Click **Generate Report**. The report will be displayed in a new browser window/tab.



The screenshot shows the 'Workbook Reports' interface. On the left, there are five numbered callouts (1-5) pointing to specific fields: 1. 'Please enter the date range you want to report on:' points to the 'From' and 'To' date pickers. 2. 'Or, chose a preset date range:' points to the 'Select' dropdown menu. 3. 'Select the format in which you would like to generate Workbook Report: (Default format is .xlsx)' points to the 'Excel Workbook (*.xlsx)' dropdown. 4. 'Report Details' points to the 'Description' and 'File Name' text boxes. 5. 'Report Worksheets' points to the 'Compliance Register : Compliance Register' text box. On the right, there is a 'Filter(s)' sidebar with a 'Compliance (TC)' section containing several filterable dropdown menus: 'Directorate', 'Compliance involved', 'Overall status', 'Overall compliance status', and 'Risk rating'. At the bottom of the main form, there are two buttons: 'Sharing Permissions' and 'Generate Report'.



Sharing Workbook Reports

If a user has the appropriate permissions, they can share Workbook Reports with other users. A user will not be able to generate a Workbook Report unless they have been granted access to that specific report.

1. Click **Share Permissions**.

Select the Workbook Report you would like to generate:

Please enter the date range you want to report on: From: To:

Or, choose a preset date range:

Select the format in which you would like to generate Workbook Report: (Default format is .xlsx)

Report Details

Description: Work Cover Import Failed Table
File Name: Work_Cover.xlsx

Report Worksheets

Sheet1 : Sheet1



- 2. The name of the report being shared is displayed

There are three ways to share workbook reports with users.

- 3. **Share with all users.** Any user who has access to Workbook Reports will be able to view the report you choose to share.
- 4. **Share with specific users:** Find a named user. They must have a RiskMan profile to be able to share the Workbook report with them
- 5. **Share with an entire Template of users:** For example, you may wish to share a Workbook Report with all Executives

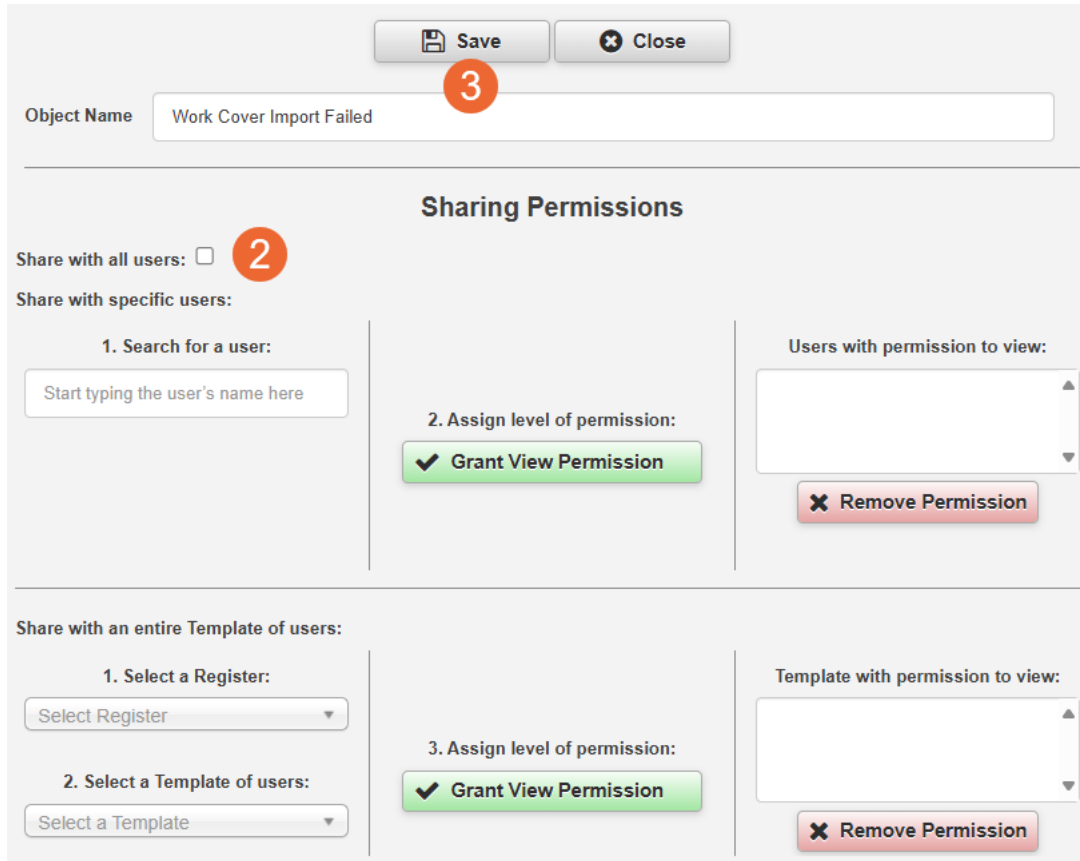
The screenshot shows the 'Sharing Permissions' dialog box in RLDatix. At the top, there are 'Save' and 'Close' buttons. Below them is the 'Object Name' field containing 'Work Cover Import Failed', with a red circle '2' next to it. The main section is titled 'Sharing Permissions' and is divided into three options:

- Share with all users:** An unchecked checkbox with a red circle '3' next to it.
- Share with specific users:** This section includes:
 - '1. Search for a user:' with a search input field containing 'Start typing the user's name here' and a red circle '4' next to it.
 - '2. Assign level of permission:' with a green button labeled 'Grant View Permission'.
 - 'Users with permission to view:' with an empty list box and a red button labeled 'Remove Permission'.
- Share with an entire Template of users:** This section includes:
 - '1. Select a Register:' with a dropdown menu showing 'Select Register' and a red circle '5' next to it.
 - '2. Select a Template of users:' with a dropdown menu showing 'Select a Template'.
 - '3. Assign level of permission:' with a green button labeled 'Grant View Permission'.
 - 'Template with permission to view:' with an empty list box and a red button labeled 'Remove Permission'.



Share with all Users

1. Click **Share Permissions**
2. Click **Share with all users**
3. Click **Save**



The screenshot shows the 'Sharing Permissions' dialog box. At the top, there are 'Save' and 'Close' buttons. Below them is the 'Object Name' field containing 'Work Cover Import Failed', with a red circle '3' highlighting the field. The main section is titled 'Sharing Permissions'. Under 'Share with all users:', there is an unchecked checkbox with a red circle '2' next to it. Below this, there are two options: 'Share with specific users' and 'Share with an entire Template of users:'. The 'Share with specific users' section includes a search box, a 'Grant View Permission' button, and a 'Remove Permission' button. The 'Share with an entire Template of users:' section includes two dropdown menus, a 'Grant View Permission' button, and a 'Remove Permission' button.



Share with Specific Users

1. Click **Share Permissions**
2. Type the name of the user to share the Workbook Report
3. Click **Grant View Permission**

Object Name: Work Cover Import Failed

Sharing Permissions

Share with all users:

Share with specific users:

1. Search for a user:

Lauren| **1**

Lauren Haupt (Lauren)

Lauren Default (Lauren default)

2. Assign level of permission:

✓ Grant View Permission **2**

Users with permission to view:

✗ Remove Permission

Share with an entire Template of users:

1. Select a Register:

Select Register

2. Select a Template of users:

Select a Template

3. Assign level of permission:

✓ Grant View Permission

Template with permission to view:

✗ Remove Permission

The named user will appear in the **Users with permission to view** box

Object Name: Work Cover Import Failed

Sharing Permissions

Share with all users:

Share with specific users:

1. Search for a user:

Start typing the user's name here

2. Assign level of permission:

✓ Grant View Permission

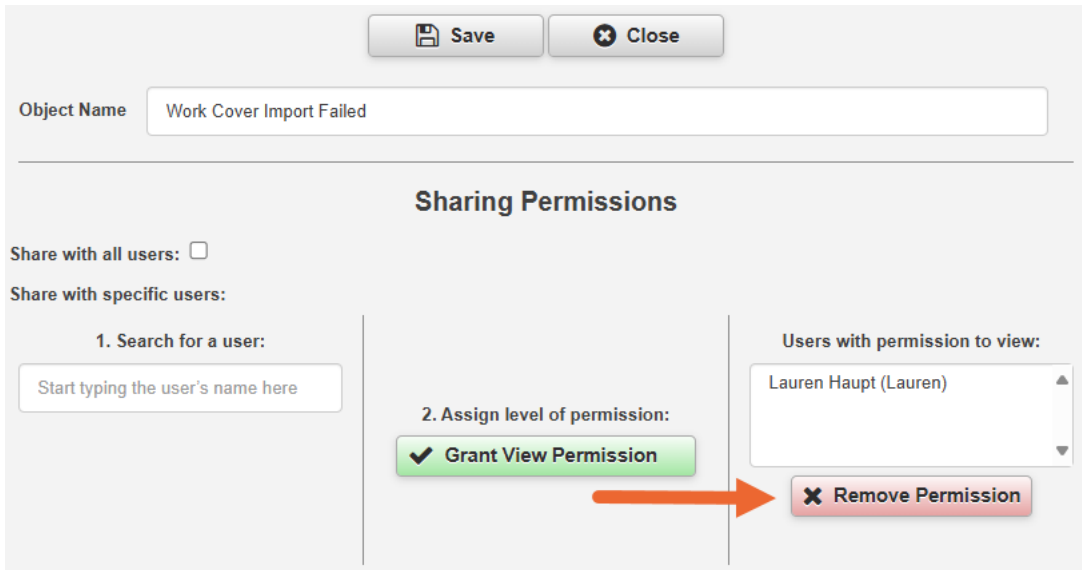
Users with permission to view:

Lauren Haupt (Lauren)

✗ Remove Permission



The users name will remain within the **Users with permission to view** box until their permission is revoked by clicking **Remove Permission**. The user will no longer be able to select this Workbook Report from the **Select the Workbook Report you would like to generate** list



The screenshot shows a 'Sharing Permissions' dialog box. At the top, there are 'Save' and 'Close' buttons. Below them is a text field for 'Object Name' containing 'Work Cover Import Failed'. The main section is titled 'Sharing Permissions'. It has a checkbox for 'Share with all users' which is unchecked. Under 'Share with specific users:', there are three columns. The first column is '1. Search for a user:' with a text input field containing 'Start typing the user's name here'. The second column is '2. Assign level of permission:' with a green button labeled 'Grant View Permission'. The third column is 'Users with permission to view:' with a list box containing 'Lauren Haupt (Lauren)'. Below the list box is a red button labeled 'Remove Permission'. An orange arrow points from the 'Grant View Permission' button to the 'Remove Permission' button.



Share with an entire Template of Users

1. Click **Share Permissions**
2. Select the register the template is applicable for
3. Select the template
4. Click **Grant View Permission**
5. The permissioned template will be named in the **Template with permission to view** box

Share Permissions

Save
Close

Object Name

Sharing Permissions

Share with all users:

Share with specific users:

1. Search for a user:

Start typing the user's name here

2. Assign level of permission:

✓ Grant View Permission

Users with permission to view:

✗ Remove Permission

Share with an entire Template of users:

1. Select a Register: 2

Incident

2. Select a Template of users: 3

SWB-Superuser

3. Assign level of permission:

✓ Grant View Permission

4

Template with permission to view:

(Incident)SWB-Superuser 5

✗ Remove Permission

The template name will remain within the **Template with permission to view** box until their permission is revoked by clicking **Remove Permission**. The user will no longer be able to select this Workbook Report from the **Select the Workbook Report you would like to generate** list



Administration of Workbook Reports

User Template Permissions

There are two permissions for workbook reports which can be set. Select either option appropriate to the template:

Both below permissions are contained within the **General** tab of templates

1. **Can Generate Workbook Reports:** This permission enables a user to go to the Workbook reports page and generate a report. This permission is essential in providing access to the workbook reports page and generating reports
2. **Can Share Workbook Reports:** This permission enables a user to share a workbook report with other users or a user template

