# PEER Support Services
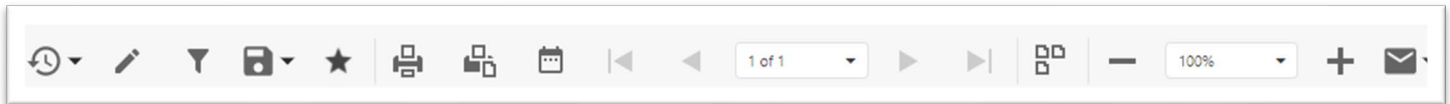
## Navigating the Report Center
### 6.17

This guide is intended to provide an overview of the Report Viewer and the drill down and export data source functions within it.

## Toolbar Icons

When running a report in the Report Viewer, the below toolbar icons are available.

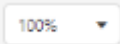| Button | Image | Description |
|---|---|---|
| **Report History** | | Displays a list of the 10 most recent reports run or edited by the current user. |
| **Report Editor** | | Opens the Report Editor (Accessing the Report Editor), allowing you to add or modify report attributes like chart titles, field aggregations and groupings, legends, date ranges and conditions. This button is not available if the report has been edited with the Report Designer (Report Designer). **Note:** This option is only available for users who have the "Create Report - Report Editor" role permission. |
| **Filter** | | Opens the Expression Editor to allow you to modify field parameters for a report. When you create expressions and click OK, the report is compiled with updated changes based on the expression editor properties. See Report Conditions Section. |
| **Save/Save As** | | Retains a record of your report in RL6 (Saving the Report); these reports may be retrieved from the Report Management panel in Report Manager. Reports that have not been saved appear in the Report History. **Note:** The Save button appears when a new report is generated or an existing report has been modified. |

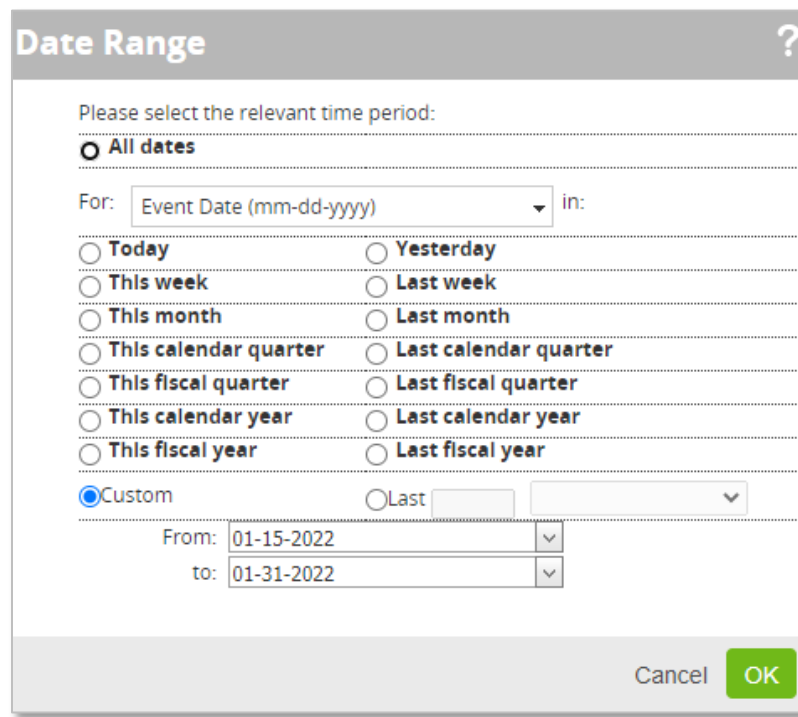| Button | Image | Description |
|---|---|---|
| **Add to Favorites** | ☆ | Adds the report to list of report favorites that can be quickly accessed through the Report Management Panel. When the report is added to favorites, the icon changes from an outlined star to a filled star. To remove a report from the favorites list, click the Favorites icon. The icon will display an outlined star instead of a filled star and the report will be removed from the list.<br>**Note:** This option is only available for users who have the "Make Report Favorite" role permission. |
| **Take Snapshot** | 📷 | Saves a PDF version of the report that can be retrieved at a later date (Creating a Report Snapshot). Snapshots are helpful when analyzing reports over time for trends. If snapshots are captured regularly, they reduce the need to regenerate the same report with different time periods. |
| **Print** | 🖶 | Opens your browser's print dialog box, allowing you to send the report to a printer defined on your computer's operating system. You may choose to send all pages, a range of pages or only the current page to the printer. |
| **Print page** | 🖶 | Allows you to print the page currently displayed. |
| **Date Range** | 📅 | Allows you to change the date range for the report. Click on the button to open the Date Range dialog. Then, select date range options and click **OK**. The dialog closes and the report is compiled with updated changes based on the defined date range. See Selecting a Report's Date Range. |
| **First page** | ◄│ | Allows you to navigate to the first page of the report. |
| **Previous page** | ◄ | Allows you to navigate to the previous page of the report. |
| **Page navigation** | 1 of 2 ▾ | Allows you to navigate or jump to specific pages of the report. |
| **Next page** | ▶ | Allows you to navigate to the next page of the report. |
| **Last page** | ▶│ | Allows you to navigate to the last page of the report. |
| **Toggle Multipage Mode** | ⊟⊟ | By default, report pages are displayed in single page mode (i.e., one at a time), allowing you to preserve an entire page view. When you click on this button, you can switch between single page to multipage mode to see several document pages simultaneously displayed in the Viewer if it has sufficient space, and pages can be partially visible. |
| **Zoom Out** | ▬ | Decreases the report's current zoom factor by 5 percent. |

| Button | Image | Description |
|---|---|---|
| **Zoom Factor** | 100% ▼ | Zooms to a specific zoom factor selected from the dropdown list. |
| **Zoom In** | + | Increases the report's current zoom factor by 5 percent. |
| **Email** | ✉ ▼ | Sends a PDF version of the report or a link to the report in RL6 to any email address (Emailing a Report). <br> **Note:** This button is hidden until the report is saved. |
| **Export To** | 📋 ▼ | Allows you to covert the report into a PDF, XLS , XLSX, DOCX, RTF , MHT , HTML, Text, CSV ,or Image (PNG) file (based on your selection) and downloads it immediately. See Exporting a Report. |

**Changing a Report Date Range**

To adjust the date range of a report once it has been run, select the Calendar icon from the top row of icons.
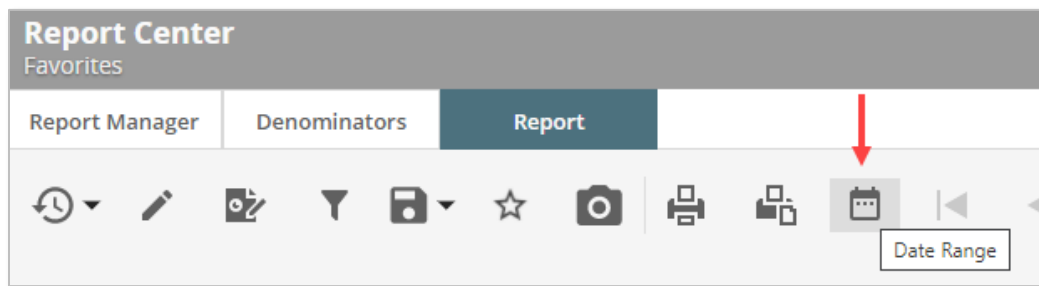


This will open a window displaying the current date range and it allows for a new date to be entered.
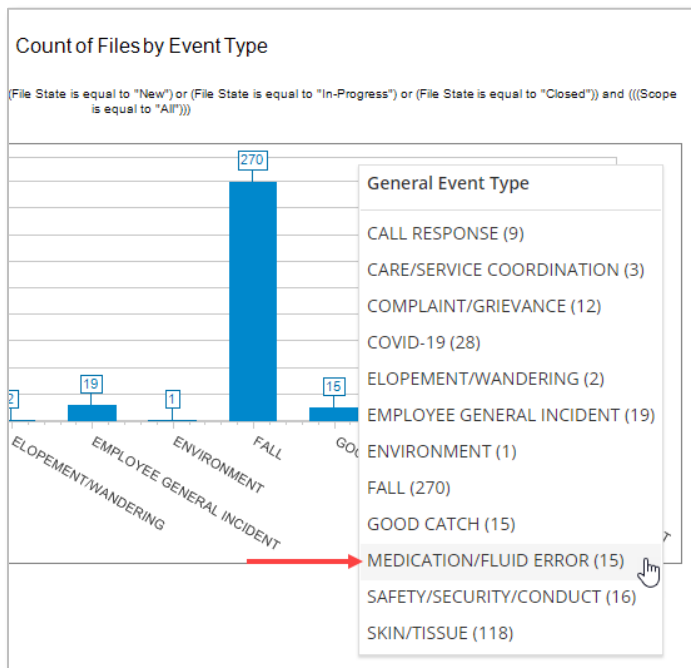
## Drilling Down on a Bar Chart

In the Report Viewer, any area of the report where the cursor appears as a drill ![drill icon] can be clicked on to begin the drill down process, it does not have to be on top of a specific bar. When clicked, the first menu to appear will be a list of all the bars that are a part of the report making it easier to drill down on a bar that is barely visible.
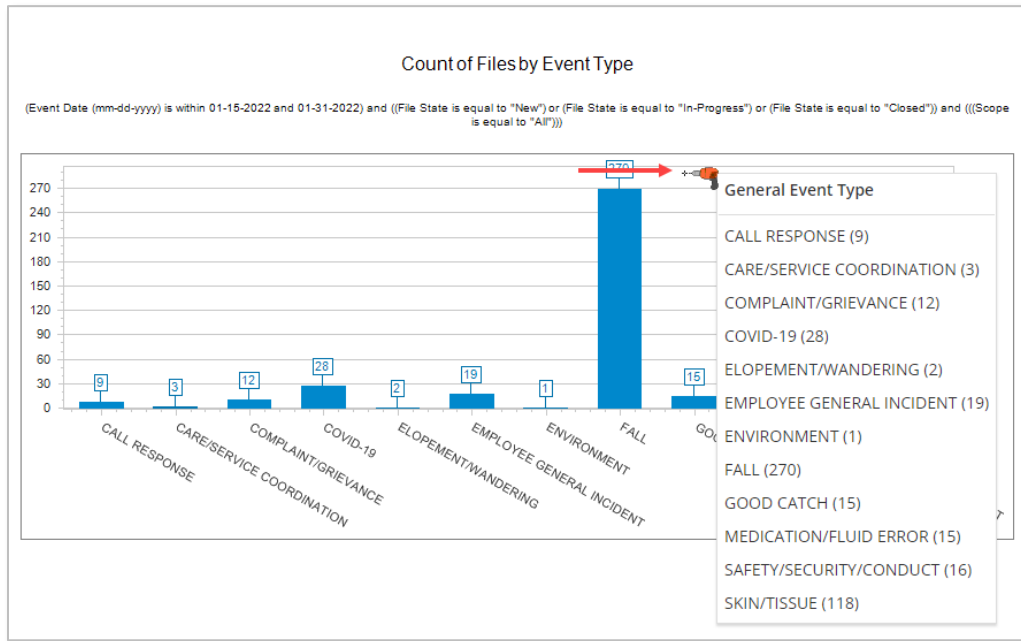


Select the bar to be drilled down on and then in the 'Drilldown fields' window, enter a specific field to drill down by or click on Files List to get a list of the file IDs for that bar.

**Drilling Down on a List Report**

When drilling down on a list report, the 'Drilldown fields' menu will automatically appear first.

## Count of Files by Event Type

(Event Date (mm-dd-yyyy) is within 01-15-2022 and 01-31-2022) and ((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed")) and (((Scope is equal to "All")))

| Count of File ID | General Event Type |
|---|---|
| 9 | CALL RESPONSE |
| 3 | CARE/SERVICE COORDINATION |
| 12 | COMPLAINT/GRIEVANCE |
| 28 | COVID-19 |
| 2 | ELOPEMENT/WANDERING |
| 19 | EMPLOYEE GENERAL INCIDENT |
| 1 | ENVIRONMENT |
| 270 | FALL |
| 15 | GOOD CATCH |
| 15 | MEDICATION/FLUID ERROR |
| 16 | SAFETY/SECURITY/CONDUCT |
| 118 | SKIN/TISSUE |

Enter the specific field to drill down by or select Files List to get a list of file IDs.

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(Event Date (mm-dd-yyyy) is within 01-15-2022 and 01-31-2022) and ((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed")) and (((Scope is equal to "All")))

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| 2 | |
| 19 | |
| 1 | |
| 270 | |
| 15 | |
| 15 | |
| 16 | |
| 118 | |

**Drilldown fields**

Incident
Specific Event Type
Specific Location

specific ← | Cancel

**Specialized drill down**

Files List ←

**Exporting the Data Source of a Report**

When trying to export the data of a bar chart so that it can be opened in Excel, the Data Grid must be included when building the report in Report Editor. In the Report Editor, under the Chart Details section of the bar chart report, check on the box beside 'Show Data Grid'.



When the report runs, the details of the bar chart will be displayed below the image of the report.



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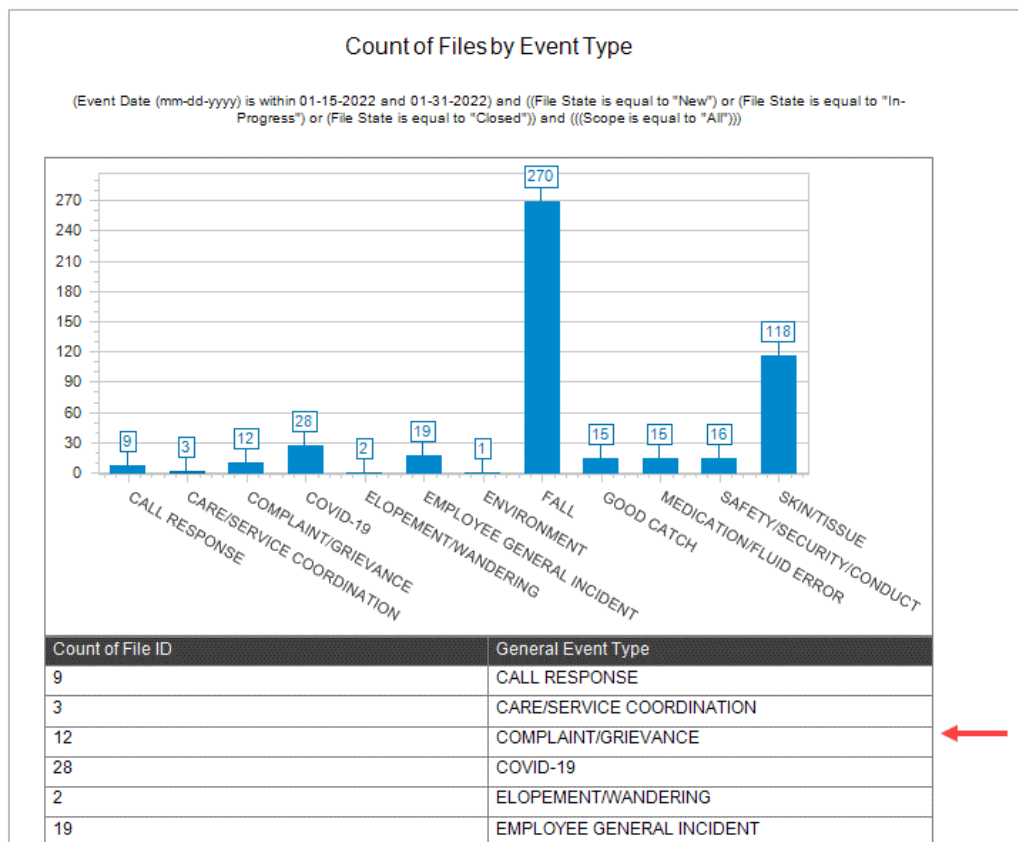
In the top row of icons, select the 'Export To' icon and from the list that appears, select CSV.
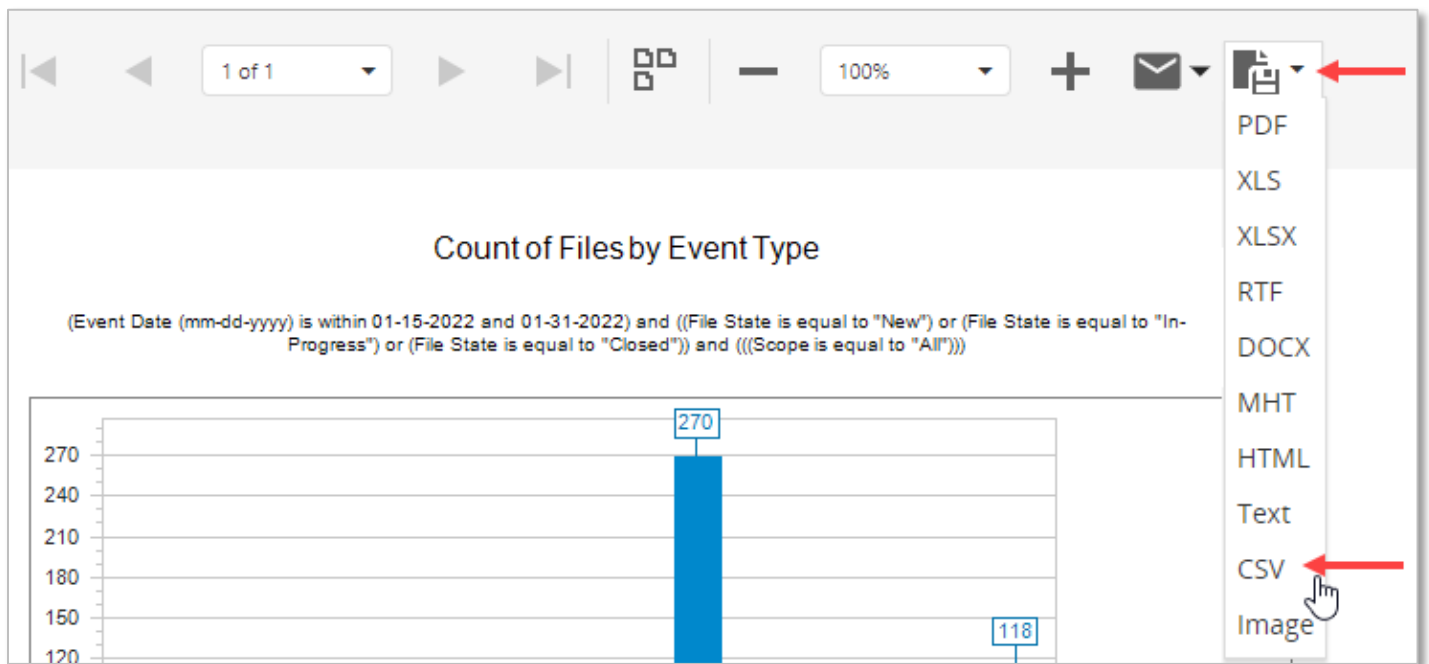


Once the file has been saved, it can be opened in Excel to display the information.

| | A | B |
|---|---|---|
| 1 | | |
| 2 | Count of Files by Event Type | |
| 3 | | |
| 4 | (Event Date (mm-dd-yyyy) is within 01-15-2022 and 0 | |
| 5 | Count of File ID | General Event Type |
| 6 | 9 | CALL RESPONSE |
| 7 | 3 | CARE/SERVICE COORDINATION |
| 8 | 12 | COMPLAINT/GRIEVANCE |
| 9 | 28 | COVID-19 |
| 10 | 2 | ELOPEMENT/WANDERING |
| 11 | 19 | EMPLOYEE GENERAL INCIDENT |
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