

View a Report

Last Modified on 10/06/2021 3:30 pm MDT

Report visibility is restricted by [user group](#) and business unit.

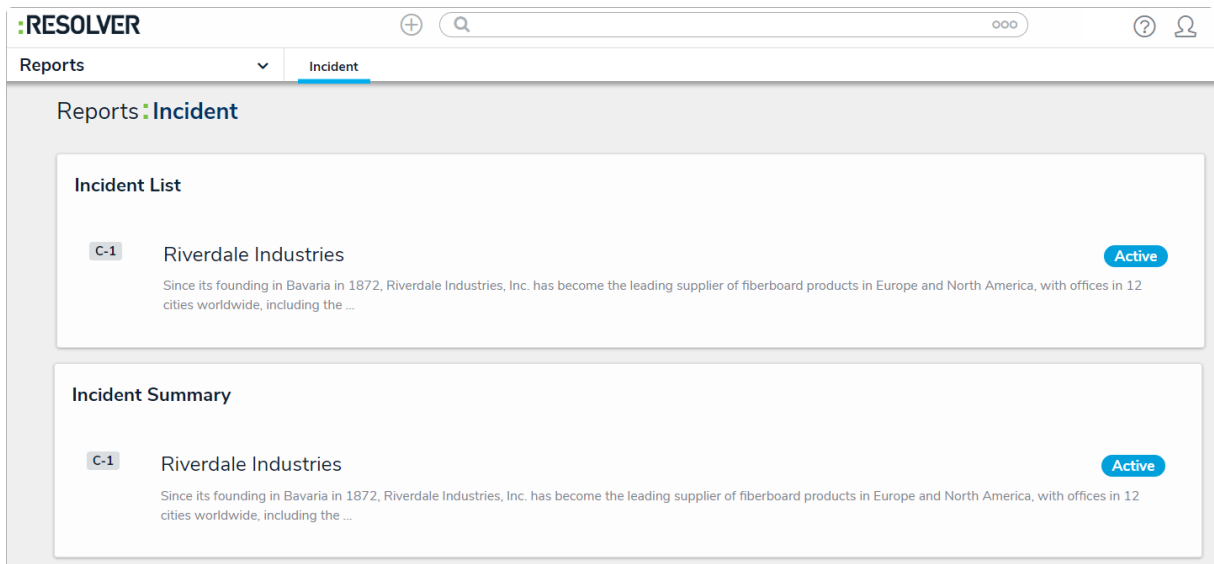
To view a report:

1. Log into a user account that's been added to the **Incident Owner**, **Incident Supervisor**, or **Incident Management Administrator** user group.
2. Click the dropdown in the nav bar > **Reports** to display the **Incident** activity.



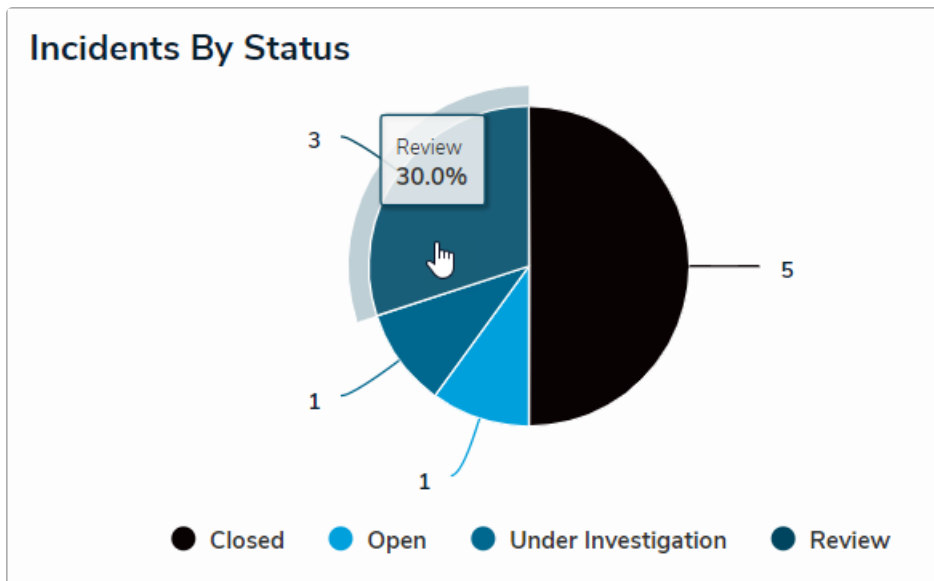
The Reports application in the nav bar.

3. Click a report to open.





Clicking on an anchor object to open a report.

4. If the report includes a bar, column, or pie chart, hover your cursor over the chart for more information about the data. Clicking on a section of a pie chart will separate it from the rest of the chart for emphasis.



Hovering your cursor over a bar, column, or bar chart will display additional information.

5. If the report includes a table:
 - a. Click a cell to open the associated object in a palette.
 - b. Click a column to sort the data in the table.
 - c. Click **Next** or **Previous** at the bottom of the table to scroll through any additional pages.
 - d. Enter search terms in the **Search Table...** field to narrow down which data is displayed.
 - e. Click the  icon to export the table data into a Word document or click the  icon to export the table data into an Excel spreadsheet.

Closed Incidents				
Incident Name	Incident Start DateTime	Closed Date/Time	Incident Age	Incident Owner
INC-2018-11-29-51 MISC	November 29, 2018 12:06 pm	2018-11-29 12:34	0 - 7 Days	Beau Fromm
CS-2018-11-26-35 ER	November 25, 2018 9:56 am	2018-11-27 9:46	0 - 7 Days	
CS-2018-11-26-34 MISC		2018-11-26 9:33	0 - 7 Days	
CS-2018-11-26-32 GSV		2018-11-26 8:50	0 - 7 Days	
CS-2018-11-26-26 CSMC		2018-11-26 8:00	0 - 7 Days	

Page 1 of 1 | 5 Rows

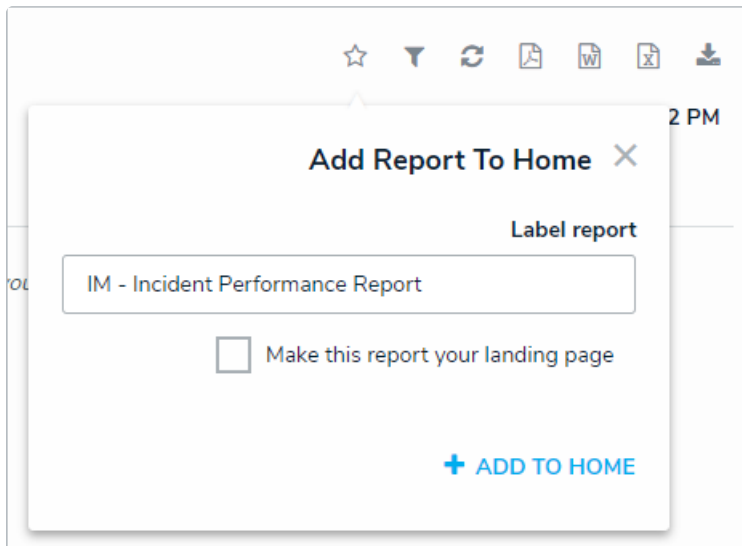
Clicking on a cell in a table will display the associated object in a palette, while clicking on a column header will sort the data in the table



Only table data can be exported into a Word document or Excel spreadsheet. If you export data from a report that also contains a chart or heat map, that data will not appear in the document or spreadsheet.

6. To star a report (create a tab for the report in the **nav bar**):

- a. Click the ☆ icon at the top-right corner of the report to open the **Add Report To Home** window.
- b. If needed, enter a custom name for the tab in the **Label report** field. The report's name, as saved by an administrator, appears in this field by default.



The Add Report To Home window.

- c. Select the **Make this report your landing page** checkbox if you want this report to replace the **My Tasks** tab or another report tab as the home page. To revert back the home page back to **My Tasks**, deselect the checkbox.
- d. Click **Add To Home** to finish.
- e. To delete the tab from the nav bar, click the ★ icon, then click **Remove From Home**.



For more information on reports added to tabs, see the [Starred Reports](#) article.

7. To apply **filters** to a report (if configured by an administrator):
 - a. Click the ⚙ icon at the top-right corner of the report to open the **Filters** palette. When a report is displayed with filters applied, the filter icon will appear with a red dot (⚙).
 - b. Apply the desired filters. The fields available will vary depending on the report.

FILTERS X

Overdue - Task
Select one... ▾

Due Date - Task
📅 FROM ▾ 📅 TO ▾

Assigned Date - Task
📅 FROM ▾ 📅 TO ▾


Completed Date - Task
📅 FROM ▾ 📅 TO ▾

Task Type - Task
Select one... ▾


Completed - Task
Select one... ▾

CANCEL APPLY FILTER

The Filters palette.

8. To refresh report data, click the  icon.

9. To export the report's attachments:

- a. Click the  icon at the top-right corner of the report to open the **Report Attachments** palette.
- b. Click **Export Attachments** to download the listed attachments as a .zip file.

IM - Incident Performance Report ?

This attachment export might take a few minutes to download depending on the number of files, size of files and your network speed

- Evidence
 - Transcript of Employee Complaint
 - Attachment
 - complaint_transcript_09-30-21.txt

CANCEL **EXPORT ATTACHMENTS**

The Report Attachments palette.