

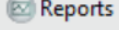


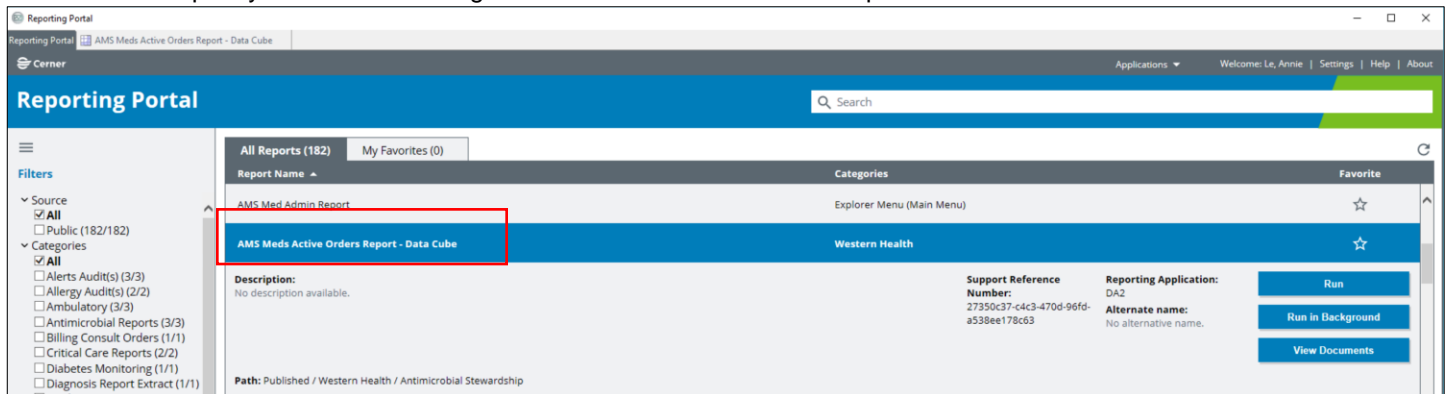
Reports / Audits - Reporting Portal

This Quick Reference Guide will explain how to:

- Run reports using the Reporting Portal
- Save Reports (must be as .csv) or copy report and paste into excel

Run and Save Report

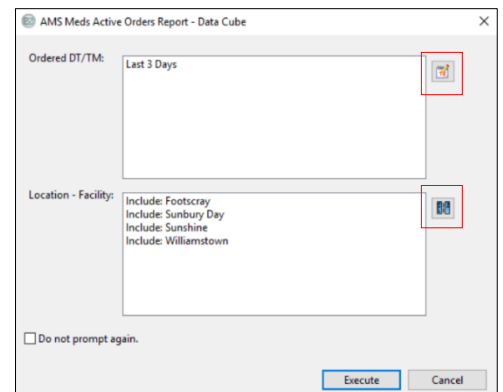
1. In Navigator toolbar, select  to open the Reporting Portal
2. Search the report you wish to run. E.g. Antimicrobial Active Orders Report – Data cube. Select Run



3. The report parameters prompts will pop-up in a window like this e.g. Ordered Date/Time, Location

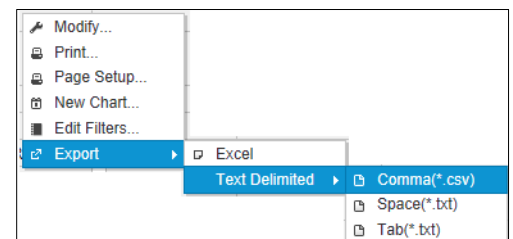
4. Modify the parameters using the icons on the right as highlighted

5. Click Execute. The report will generate in a different tab – it can be viewed on screen or saved

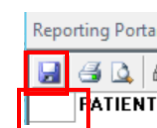


6. Depending on the type of report being run, there are different ways to save it:

- a) If you Right click and there is an Export option
 - i. Select Export > Text Delimited > **Comma (*.csv)**
 - ii. Save **.csv file** to a folder location



- b) If there is a **blank square** in the top left hand corner of your report
 - i. Click in that box to highlight the whole report > **CTRL C (copy)** > open excel and **CTRL V (paste)**
 - ii. Alternatively click on the 'disk' icon to save as a **.csv file** to a folder location



Note 1: Save in a familiar location such as your **local C: drive** or the **shared S: drive** to ensure easy retrieval of the report.

Note 2: Choose an appropriate folder location when saving as it may sensitive information.

Note 3: The **.csv** file can later be saved as an Excel workbook to utilise Excel functions i.e. formulas, formatting.