

IndustrySafe – Incident Analysis Grid Quick Guide

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Overview of Components

The Analysis Grid Log Reports have multiple components and feature functionality as follows.

Heading Components

Open

Opens a drop-down menu that lets the user open both the users' saved reports and reports shared by administrators.

The screenshot shows the 'Incident Log Report' interface. At the top, there are navigation tabs: '+ Reports & Analysis', 'Regulatory Reports', 'Employees', and 'Company Profile'. Below the tabs, the title 'Incident Log Report' is displayed with an information icon. To the left of the title is a 'Shared Reports' dropdown menu, and to the right are action buttons: 'Open', 'Save', 'Save As', 'Refresh', and 'Reset'. Further right are 'Export' buttons for 'Excel', 'CSV', and 'PDF'. Below the title, there are two tables of reports. The first table, 'Shared Reports', has columns for 'File Name', 'Date Modified', 'Created By', 'Delete Report', and 'Schedule Report'. It lists five reports: 'Public_Month to Day', 'Public_Incident Type KPI Report', 'Public_Incidents by Month', 'Public_Incidents by Facility (Top 20)', and 'Public_Incidents by Type'. The second table, 'My Reports', has columns for 'File Name', 'Date Modified', 'Share Report', 'Delete Report', and 'Schedule Report'. It lists one report: '2017 Incident Log Report'. Red arrows point to the 'Shared Reports' dropdown, the 'Open' button, and the 'My Reports' dropdown.

Save

Saves the user's analysis grid customizations to file so they may be recalled later (in a different session).

Save As

Saves the user's analysis grid customizations to a file as a new report to be recalled later (in a different session)

Refresh

Refreshes the grid data without losing any of the user's grid customizations made during the session.

Reset

User settings are automatically retained during their sessions; use this link to clear those settings.

Export Features

The Analysis Grid includes three buttons that allow you to export **Table** data to: **Excel**, **CSV**, and **PDF**. Note: The export to Excel, and export to CSV features only include table data. The export to PDF feature will also include charts and graphs associated with the report.

Excel

Exports displayed columns and records to Excel spreadsheet.

CSV

Exports displayed columns and records to CSV file.

PDF

Exports displayed columns and records to PDF in a landscape view. Your logo can display on the top right corner of the PDF but must be uploaded by your organization's IndustrySafe System Administrator in the System Function Logo Area of the application.

Basic Features

Columns

The Columns panel is available within the Show/Hide Options gear icon. The Columns component allows users to select which columns to display in the table simply by checking the columns they would like to include. The order the fields display in the Columns list is also the default order the columns will appear in the table.

In addition, users can move columns by dragging and dropping the column with the mouse.

The columns that appear in the Columns component differ from Analysis Grid to Analysis Grid, however the Columns component functions the same way in all the Analysis Grids. Please note, the listing of columns available to include in the report cannot be edited.

+ Reports & Analysis ▾ | Regulatory Reports ▾ | Employees

Incident Log Report i

Open | Save | Save As | Refresh | Reset

Show/Hide Options Button

Filter

Table ⚙️ 📄 ⬇️

Columns Sort | Paging

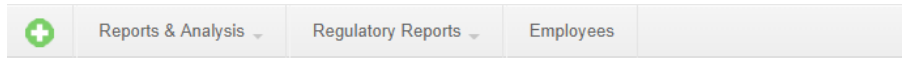
Hide and show columns.

<input type="checkbox"/> (All)	<input type="checkbox"/> Time of Incident	<input type="checkbox"/> Employee Injured	<input checked="" type="checkbox"/> Description of Incident
<input type="checkbox"/> Incidents	<input type="checkbox"/> Date Reported	<input type="checkbox"/> Non Employee Injured	<input checked="" type="checkbox"/> Root Cause
<input checked="" type="checkbox"/> Incident Number	<input type="checkbox"/> Involved Employee ID	<input type="checkbox"/> Property Damage	<input checked="" type="checkbox"/> Report Status
<input type="checkbox"/> Business Group	<input checked="" type="checkbox"/> Involved Employee Name	<input type="checkbox"/> Preparer's ID	<input checked="" type="checkbox"/> Closed
<input type="checkbox"/> Region	<input checked="" type="checkbox"/> Involved Employee Title	<input checked="" type="checkbox"/> Preparer's Name	<input type="checkbox"/> Corrective Actions Identified
<input type="checkbox"/> Division	<input type="checkbox"/> Worker Type	<input type="checkbox"/> Supervisor's ID	<input type="checkbox"/> Corrective Actions Open
<input checked="" type="checkbox"/> Facility	<input checked="" type="checkbox"/> Incident Type	<input type="checkbox"/> Supervisor's Name	<input type="checkbox"/> View In IndustrySafe
<input checked="" type="checkbox"/> Date of Incident	<input type="checkbox"/> Vehicle Involved	<input checked="" type="checkbox"/> OSHA Recordable	

OK

Sort

The Sort panel is available within the Show/Hide Options gear icon. The dropdown menu next to **Data Column** selects the column. **Order Direction** sorts the column in either ascending or descending order. As Sort Order columns are created, they are added to the list of sorts. They can be **Replaced** or Removed. More than one column can be sorted by adding **Data Columns**.



Incident Log Report ?

Open | Save | Save As | Refresh | Reset

Show/Hide Options Button

Filter

Table

Sort Paging

Order rows by cell values.

Data Column

Order Direction

Add

Filter

The available columns can be chosen in the **Filter Column** drop down menu. **Comparison** operators include =, <, <=, >=, >, Not =, In List, Not In List, Starts With, Contains, Not Starts With, Not Contains, Date Range, Range.

The **Starts With** and **Contains** operators are useful for finding values at the beginning or within data (analogous to SQL WHERE clause operators LIKE and CONTAINS) and will work with both text and numeric data. They **do not support wildcard** characters.

You can add **multiple filters** which are initially linked together using **AND** logic. Clicking the **AND** link to the left of a filter in the Filters list will cause the relationship to change to **OR**. If multiple filters are set on the same column, **OR** logic is automatically applied. If two or more filters are created, a set of **Up** and **Down arrows** appear next to the filter. These arrows can be clicked to **re-order** the precedence of the filters. Further, to the right of the Up and Down arrows will be Plus (+) and Minus (-) signs, which can be used to group filters together. Clicking the Plus sign will place the open parenthesis on the filter above, and the closed parenthesis on the filter where you clicked the Plus sign.

The value is the number that the **Comparison** is looking for. This will appear as a dropdown menu if the **Filter Column** selected is a **date type** column. The two choices are **Specific Date**, which will give a result on the date chosen, or **Sliding Date**, which will have a long list to choose from (*Last Month Start, 90 Days Ago, etc.*).

In addition, the interface includes the **Date Range** comparison option and different value controls, for Starting and Ending dates, which can be used in a variety of combinations.

Incident Log Report ⓘ

Open | Save | Save As | Refresh | Reset

 **Filter**
 Add Chart
  Add Crosstab

Filter rows by cell values. ⚙️

Filter Column

Comparison

Value ...

Add

Sliding Date Range

[Date of Incident] Date Range Last Month Start - Last Month End

Replace Remove

And ([Facility] = Deerfield

Replace Remove ↕ (-) (+)

Or [Facility] = Dallas

Replace Remove ↕ (-) (+)

Or [Facility] = New York City)

Replace Remove ↕ (-) (+)

Remove All...

AND / OR Logic

Paging

The **Paging** button can be used to access the **Rows per Page** field, where the numbers of rows displayed per page can be adjusted. The Paging panel is available within the Show/Hide Options gear icon.

+ Reports & Analysis ▾
▾ Regulatory Reports ▾
▾ Employees

Incident Log Report ⓘ

Open | Save | Save As | Refresh | Reset

⌵ Filter

⌵ Table ⚙️ 📄 ⬇️

 Columns Sort Paging

⏪ **Set the number of rows displayed per page.**

 Rows per Page

⏪ ⏩ 1 2 3 4 5 6 7 8 9 10 ⏪ ⏩

Incident Number	Facility	Date of Incident	Involved Employee Name ▼	Involved Employee Title
FY09-0063	Mississippi Main	10/10/2008	zach stip	
FY18-00283	valero	01/07/2018	zach stip	
FY18-00219	valero	11/20/2017	zach stip	