Reports - generating and printing reports

This chapter explains how to generate and print the catalog and resource reports available in ROSS. Topics discussed in this chapter include:

- About Brio.Quickview
- Generating Status reports
- Generating Administration reports
- Generating Incident reports
- Printing and exporting reports.

About Brio.Quickview

ROSS uses the commercial software Brio.Quickview[1] to generate, save, and print Catalog and Resource reports. When you access the Report Criteria screen, select your report information and then click View Report, Brio.Quickview takes over to process and generate your report. You will see several Brio.Quickview screens and dialog boxes that appear sporadically during the processing of your report. Once you save and/or print your report, can close these Brio.Quickview screens and resume ROSS.

To install Brio.Quickview on your personal computer

You must perform this task the first time you generate a Catalog or Resource report. For more assistance installing Brio.Quickview, contact the ROSS Helpdesk at (866) 224-7677 or e-mail at helpdesk@dms.nwcg.gov

1. From the **Report Criteria** screen, generate a **Catalog** or **Resource** report of your choice, and then click **View Report**.
2. On the **Installation Wizard** dialog box, click **Begin**.
3. On the **Security Warning** dialog box, click **Yes**.
4. Complete the remaining installation instructions as instructed on your screen.

1.Brio.Quickview is part of BRIO.ENTERPRISE, a registered trademark of Brio Technology, copyrighted 2001. All rights reserved.

The following diagram shows the Installation Wizard dialog box for installing Brio.Quickview.

This dialog box displays every time you generate a report. Once you have successfully installed Brio.Quickview on your personal computer, click ***Cancel*** *every time this dialog box displays.*

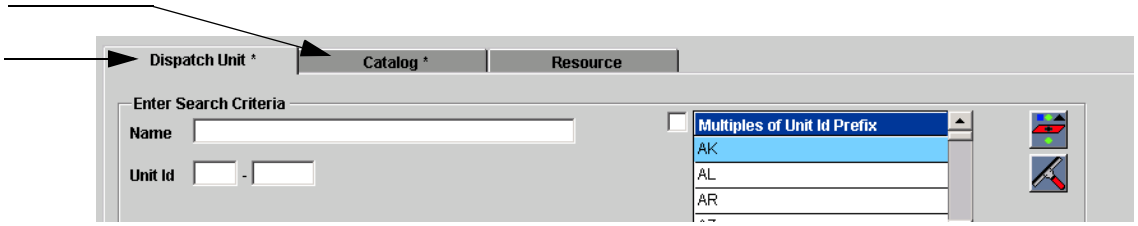
The following diagram shows the Security Warning dialog box.

Understanding the Report Criteria screens

All Report Criteria screens contain tabs that contain the information you must complete before generating a report. Tabs that contain *required* fields display an asterisk (*) next to the name of the tab. You need not complete all information to generate a report, just those *required* fields.

For example, while the Report Criteria screen for generating Status reports contains three tabs, only two of those tabs contain required fields. The arrows

on the following diagram point to the Dispatch Unit tab and the Catalog tab on the Report Criteria screen.



Your entries are automatically saved when you click to select another tab, when you click View Report, or when the report format requirements change.

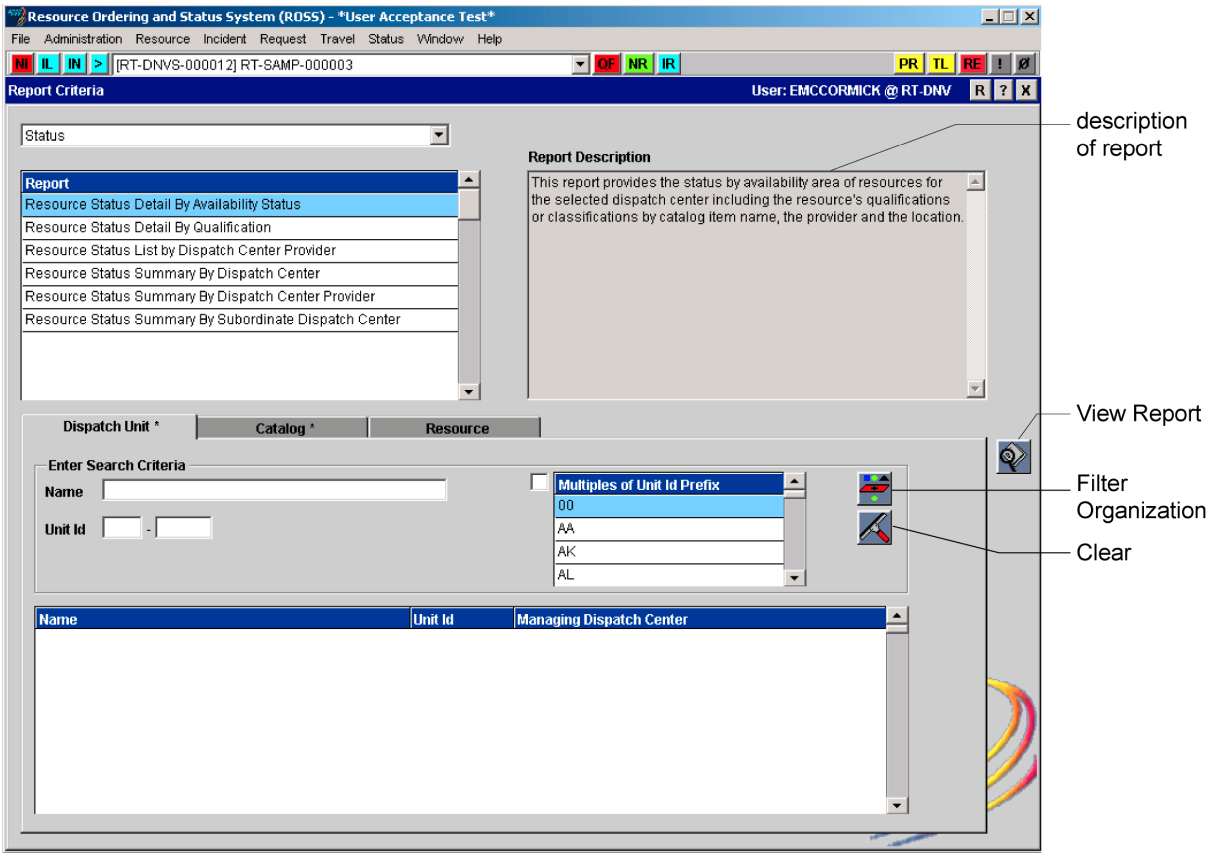
Generating Status reports

This section explains how to generate and print Status reports. Complete all tabs that display an asterisk (*).

To access the Report Criteria screen - Status reports

- On the **Administration** menu, click **Reports**.

Report Criteria screen - Status



To generate a Status report

1. On the **Report Criteria** screen, click the drop-down arrow, and then click to select **Status**.
2. On the **Report** table, click to highlight the **Report** type of your choice.
3. Complete the tabs as appropriate for the Status report of your choice, and then click the **View Report** button.

For more information about completing Report Criteria tabs, see the section, "Completing tabs on the Report Criteria screen."

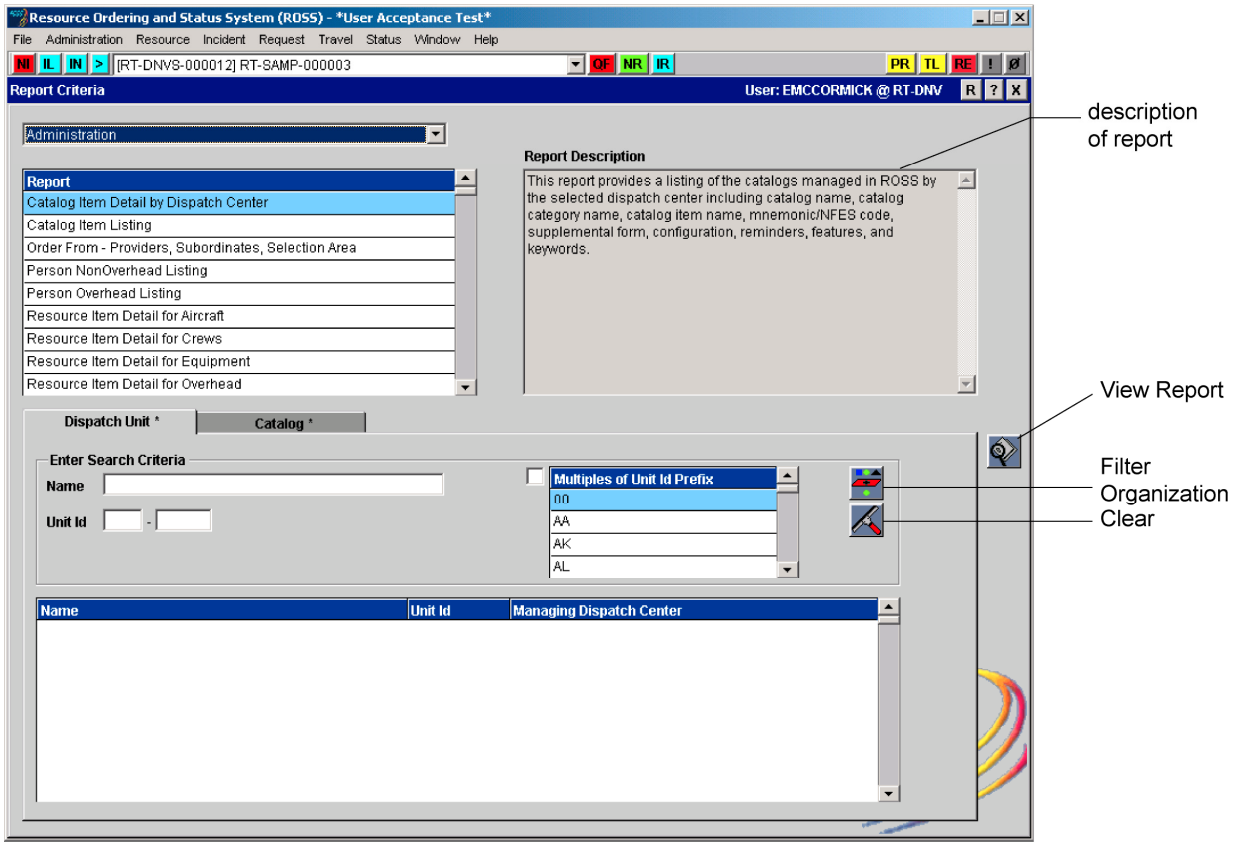
Generating Administration reports

This section explains how to generate and print Administration reports. Complete all tabs that display an asterisk (*).

To access the Report Criteria screen - Administration reports

- On the **Administration** menu, click **Reports**, click the drop-down arrow, and then click **Administration**.

Report Criteria screen - Administration



To generate an Administration report of your choice

1. On the **Report Criteria** screen, click the drop-down arrow, and then click to select **Administration**.
2. On the **Report** table, click to highlight the **Report** type of your choice.
3. Complete the tabs as appropriate for the Administration report of your choice, and then click **View Report**.

For more information about completing Report Criteria tabs, see the section, "Completing tabs on the Report Criteria screen."

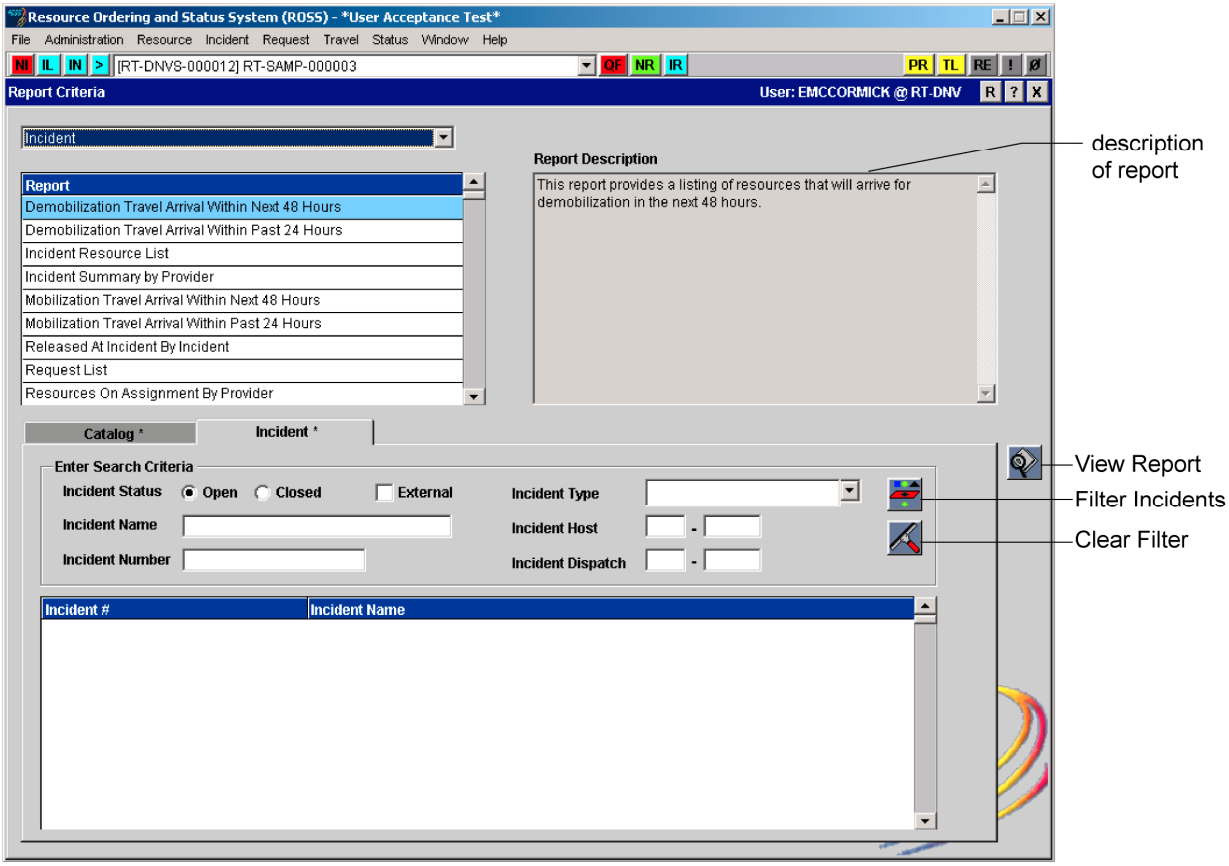
Generating Incident reports

This section explains how to generate and print Incident reports. Complete all tabs that display an asterisk (*).

To access the Report Criteria screen - Incident reports

- On the **Administration** menu, click **Reports**, click the drop-down arrow, and then click **Incident**.

Report Criteria screen - Incident



To generate an Incident report of your choice

1. On the **Report Criteria** screen, click the drop-down arrow, and then click to select **Incident**.
2. On the **Report** table, click to highlight the **Report** type of your choice.
3. Complete the tabs as appropriate for the Incident report of your choice, and then click **View Report**.

For more information about completing Report Criteria tabs, see the section, "Completing tabs on the Report Criteria screen."

Completing tabs on the Report Criteria screen

This section explains how to complete the tabs that display for Status, Administration, and Incident reports. Tasks include:

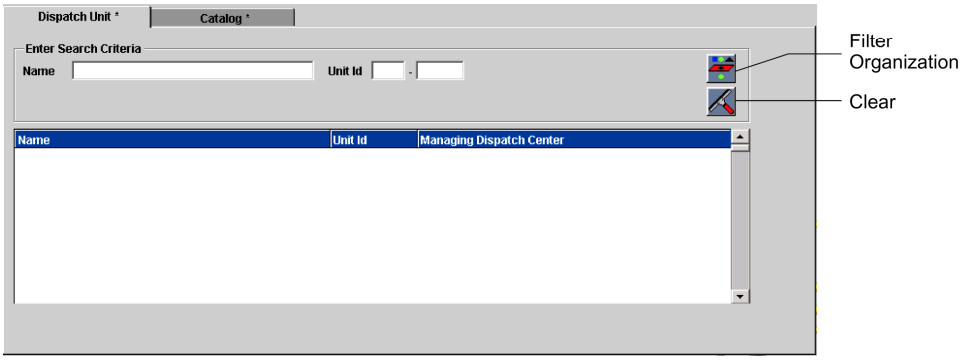
- To complete the Dispatch Unit tab
- To complete the Catalog tab
- To complete the Dispatch and Provider tab.

To complete the Dispatch Unit tab

- On the **Dispatch Unit** tab, click the **Filter Organizations** button, and then search for and click to highlight the **Dispatch Organization Name** of your choice.

*To search for a specific dispatch organization, type information into the **Name** and/or **Unit Id** boxes to narrow your search, and then click the **Filter Organizations** button. You can also perform a wildcard (*) search.*

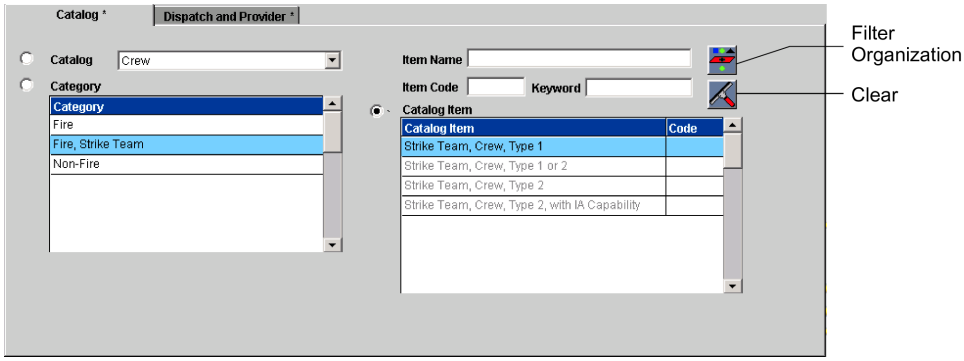
The following diagram shows the Dispatch Unit tab.



To complete the Catalog tab

1. On the **Report Criteria** screen, click the **Catalog** tab.
2. To generate a report for a specific **Catalog**, click the **Catalog** option, click the **Catalog** drop-down arrow, and then click to highlight the **Catalog** of your choice.
3. To generate a report for a specific **Category**, click the **Category** option, and then click to highlight the **Category** type of your choice.
4. To generate a report for a specific **Catalog Item**, click the **Catalog Item** option button, click the **Filter** button, and then click to highlight the **Catalog Item** of your choice.

The following diagram shows the Catalog tab.



To complete the Dispatch and Provider and the Provider tab

The Dispatch and Provider tab and the Provider tab contain the same information. Only the Dispatch and Provider tab is shown.

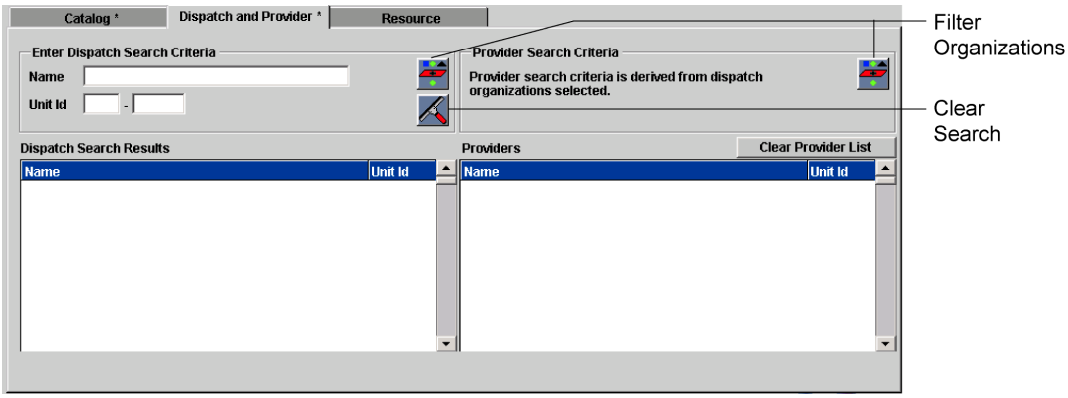
1. On the **Report Criteria** screen, click the **Dispatch and Provider** tab.
2. Under **Enter Dispatch Search Criteria**, click the **Filter Organizations** button, and then search for and click to highlight the **Dispatch Organization Name** of your choice.

   *To search for a specific dispatch organization, type information into the **Name** and/or **Unit Id** boxes to narrow your search, and then click the **Filter Organizations** button. You can also perform a wildcard (*) search.*

3. To generate a report for a specific provider within the selected dispatch organization, click the **Filter Organizations** button under **Provider Search Criteria**, and then click to highlight the **Provider Name** of your choice.

   *To clear the provider list, click the **Clear Provider List** button.*

The following diagram shows the Dispatch and Provider tab.

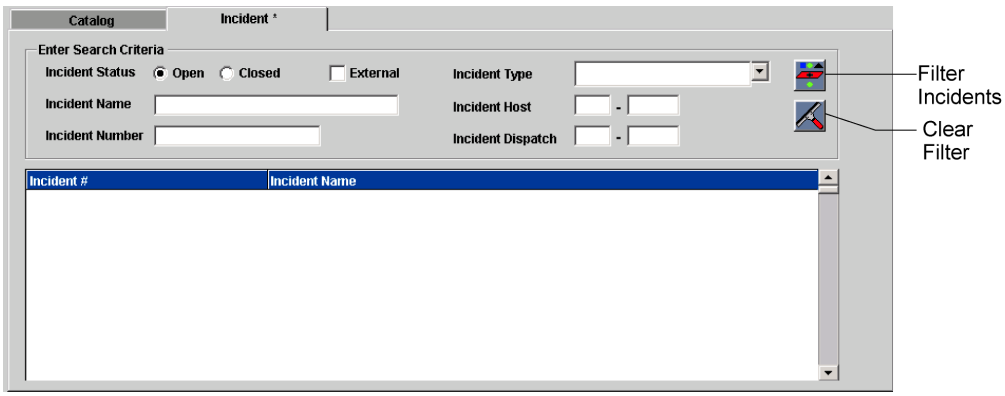


To complete the Incident tab

1. On the **Report Criteria** screen, click the **Incident** tab.
2. Under **Incident Status**, click the **Incident Status** option of your choice.
3. To filter for an external Incident, click to select the **External** check box.
4. Under **Enter Dispatch Search Criteria**, click the **Filter Incidents** button, and then search for and click to highlight the **Incident #** of your choice.

   *To search for a specific Incident, type or click to select information into the **Incident Name**, **Incident Number**, **Incident Type**, **Incident Host**, and/or **Incident Dispatch** boxes to narrow your search, and then click the **Filter Incidents** button. You can also perform a wildcard (*) search.*

The following diagram shows the Incident tab.

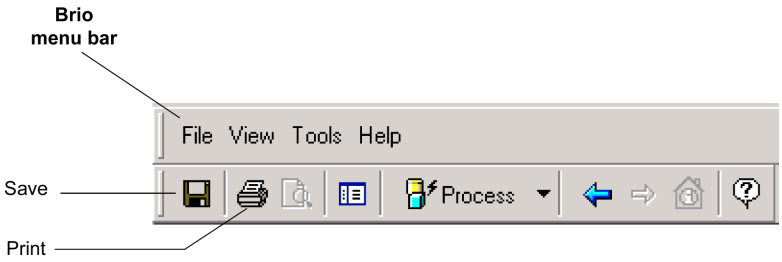


Printing and exporting reports

This section explains how to save and print ROSS reports using Brio.Quickview. You can export reports in the following formats:

- HTML
- Text (tab delimited)
- JPEG
- Acrobat
- Excel.

The following diagram shows the Brio.Quickview menu bar and toolbar, which displays directly under the Internet Explorer menu bar and toolbar.

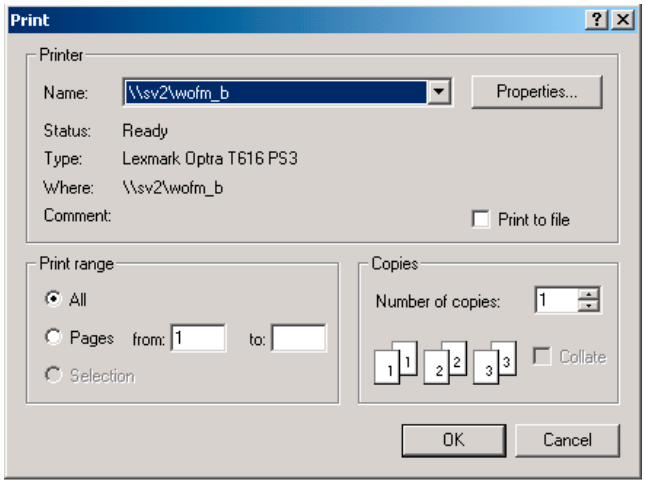


To print a report

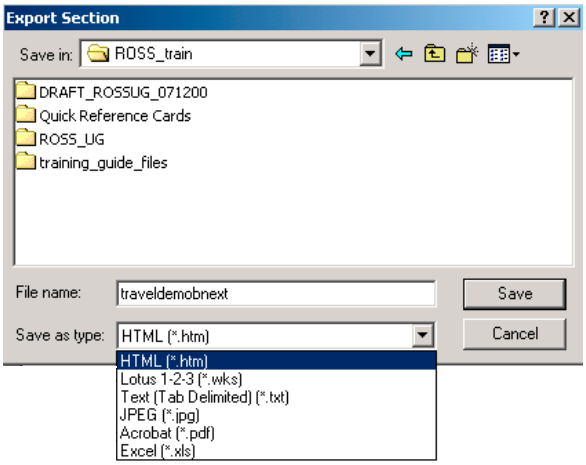
1 Click the **Print** icon, or click **Print** on the **File** menu.

2 On the **Print** dialog box, review the printer settings and then click **OK**.

The following diagram shows a sample Print dialog box.



To export a report

1. On the **File** menu, click **Export**, and then click **Section**.
2. On the **Export Section** dialog box, click the **Save in** drop-down arrow and then select the file location of your choice.
3. Click the **Save as type** drop-down arrow, click to select the file type of your choice, and then click **Save**.

The following diagram shows the Export Section dialog box that displays when you export a ROSS report from Brio.Quickview.