



# TapRoot®

Changing the Way The World Solves Problems

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Lets jump right into it. From the home page of the software and locate the TRENDS tab at the top and select the EXPORT option for the drop down list. Once this is selected this will bring you to the export page.

The screenshot displays the TapRoot software interface. At the top, a dark header bar features the TapRoot logo and tagline on the left, and navigation links (HOME, CREATE NEW, ADMIN, TRENDS, EXIT) on the right. The 'TRENDS' link is highlighted. Below the header, the page title 'Export' is shown. Underneath, there is a 'Select One' section with four radio button options: 'All' (selected), 'Incidents', 'Incident and Investigations', and 'Audits'. A green plus icon and the text '+ Add Filter' are positioned below the radio buttons. A table titled 'Filters' is displayed, with columns for 'Type', 'Edit', and 'Delete'. The table is currently empty. At the bottom of the table, a pagination bar shows '1' and navigation arrows. To the right of the table, the text 'There are no Filters to Edit.' is visible. Below the table, there is a 'Date Range' section with 'From' and 'To' input fields, and a blue 'Export' button.

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HOME CREATE NEW ADMIN TRENDS EXIT

### Export

Select One

- ☒ All
- ☐ Incidents
- ☐ Incident and Investigations
- ☐ Audits

+ Add Filter

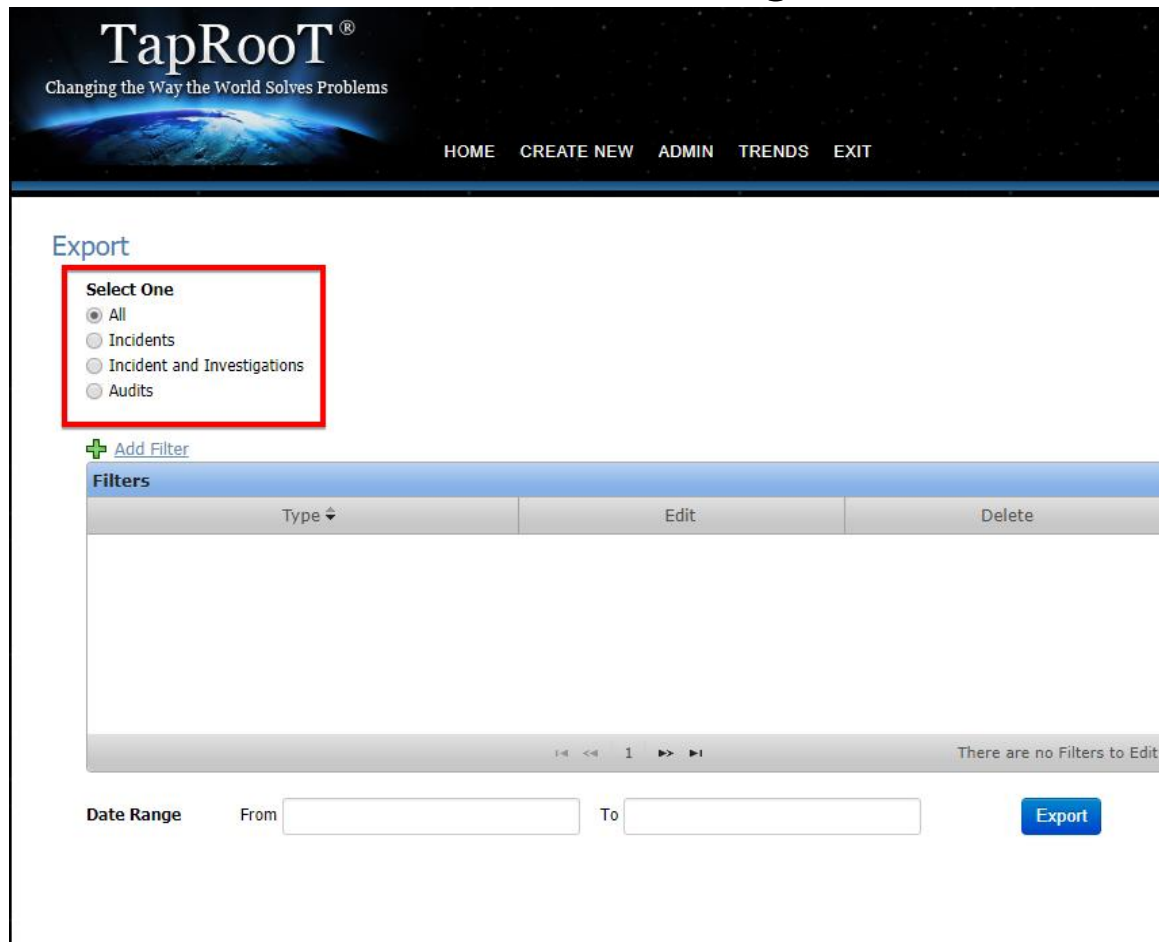
Type	Edit	Delete
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1

There are no Filters to Edit.

Date Range From To [Export](#)

- As you can see, there are three sections below(Select. First, the user can choose to export data from their incidents, incidents and investigations, audits, or all.



The screenshot shows the TapRoot web application interface. At the top is a dark header with the TapRoot logo and tagline "Changing the Way the World Solves Problems". Below the header is a navigation bar with links: HOME, CREATE NEW, ADMIN, TRENDS, and EXIT. The main content area is titled "Export" and contains a "Select One" dropdown menu. This menu is highlighted with a red rectangle and lists four options: "All" (selected), "Incidents", "Incident and Investigations", and "Audits". Below the dropdown is a "+ Add Filter" link. Underneath is a "Filters" table with columns for "Type", "Edit", and "Delete". The table is currently empty, and a message at the bottom right of the table states "There are no Filters to Edit.". At the bottom of the page, there is a "Date Range" section with "From" and "To" input fields, and a blue "Export" button.

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HOME CREATE NEW ADMIN TRENDS EXIT

Export

Select One

- ☒ All
- ☐ Incidents
- ☐ Incident and Investigations
- ☐ Audits

+ Add Filter

Type	Edit	Delete
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There are no Filters to Edit.

Date Range From To Export

Next, let's take a look at the **Filters** section. Once the **ADD FILTER** option is selected, the **filters** box will appear with a dropdown box with different options to choose from. Some of the options you see below are **custom list** I have created so you may not see the same options with in your own software. If you have not made custom list in the software then by default you will only see **Classification and Location**.

Filters

List

-- Select --

-- Select --

Classification

Severity

Location

client

Media Coverage

Environmental Cost

Cost / Consequences of event

Authorities / stakeholders involved

Injury

Select Cancel



Now the user will choose the date range of data that they wish to export. When the FROM/TO fields are selected a drop down calendar will appear. Once you have the dates chosen, you can now select the Export button and an Excel file will download to your machine.

### Export

**Select One**

☒ All  
☐ Incidents  
☐ Incident and Investigations  
☐ Audits

[+ Add Filter](#)

Type ▾	Edit	Delete
<a href="#">Location</a>		

1 << >> >>> View 1 - 1 of 1



**Date Range** From  To  [Export](#)

- As you can see below I have chosen Incidents and Investigations, my filter is Location and my date range is Nov. 0,1 2016 to Nov. 15, 2017.

### Export

- Select One**
- ☐ All
  - ☐ Incidents
  - ☒ Incident and Investigations
  - ☐ Audits

[+ Add Filter](#)

Filters		
Type ▾	Edit	Delete
<a href="#">Location</a>		
<div> <span>⏪</span> <span>⏴</span> <span>1</span> <span>⏵</span> <span>⏩</span> </div> <div>View 1 - 1 of 1</div>		

**Date Range**

From 
 To

Export



When you open the Excel file, notice the three default tabs on the bottom of the file.

These tabs are used for reference and the data can not be changed or manipulated.

	A	B	C	D	E
1	EventID	Name	Date	Time	Location
2	495	Ankle (Sprain)	Dec 01 2016	01:00	Building B
3	1519	Causal Factor Testing (AECI)	Jun 16 2017		System Improvements
4	1743	askdhvbsdv	Jul 12 2017		System Improvements
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Event Data
Root Cause Data
Corrective Action Data

- These tabs show the following information:
- **Event tab** – Event ID, Event Name, Date, Time, Location, Classification, Date Incident Discovered, Started, Completion, and Detailed Description.
- **Root Cause Data** – Name, Date, Location, Classification, Causal Factor, Root Cause/Basic Cause.
- **Corrective Action Data** - Name, Location, Classification, Corrective Action Name, Corrective Action Description, Root Causes Fixed.
- Users can add a new sheet by hitting the + icon next to the default tabs add copy over this data and customize it how they would like.



User Questions? Give us  
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