



TapRoot®

Changing the Way The World Solves Problems

System Improvements, Inc.
238 South Peters Road, Suite 301
Knoxville, Tennessee 37923 USA
Phone: 865-539-2139 Fax: 865-539-4335
e-mail: info@taproot.com
web: www.taproot.com

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, the TapRoot logo and tagline "Changing the Way the World Solves Problems" are visible. Below this is a navigation bar with the following menu items: HOME, CREATE NEW, ADMIN, TRENDS, and EXIT. The main content area is titled "Export" and features a "Select One" section with four radio button options: All (selected), Incidents, Incident and Investigations, and Audits. Below the selection options is a "+ Add Filter" link. A "Filters" table is shown, which is currently empty. The table has three columns: "Type" (with a dropdown arrow), "Edit", and "Delete". At the bottom of the table, there is a pagination control showing "1" and a message "There are no Filters to Edit." Below the table is a "Date Range" section with "From" and "To" input fields and an "Export" button.

- 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 displays the TapRoot web application interface. At the top, the TapRoot logo and tagline "Changing the Way the World Solves Problems" are visible, along with a navigation menu containing "HOME", "CREATE NEW", "ADMIN", "TRENDS", and "EXIT". The main content area is titled "Export" and features a "Select One" dropdown menu with four radio button options: "All", "Incidents", "Incident and Investigations", and "Audits". Below this menu is an "Add Filter" button. A "Filters" table is present, which is currently empty, with columns for "Type", "Edit", and "Delete". At the bottom of the page, there is a "Date Range" section with "From" and "To" input fields, and an "Export" button.

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
Location		

◀ ◁ 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
Location		

View 1 - 1 of 1

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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Ready

- 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
a call 011 (865) 539- 2139
Problems? TapRoot®
Technical Support 011
(865) 357-0080
support@taproot.com