TABLE OF CONTENTS

ANNEX D - CREATING REPORTS (TRUSTS AND GP PRACTICES)

How Do I Run Reports?

1.   Select the **Information Mapping** option on the bottom right-hand side of the screen.
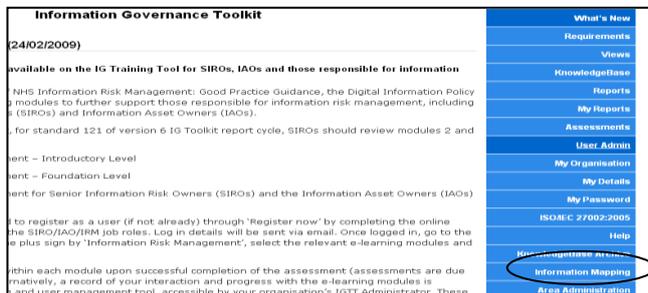
Report selection screen

2.   There are two categories of report available:

- National Reports - a set of pre-defined reports, and
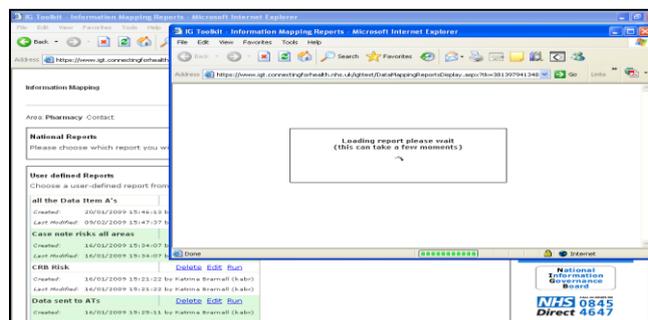- User Defined

National Reports

3.   These are various options available via a drop down menu

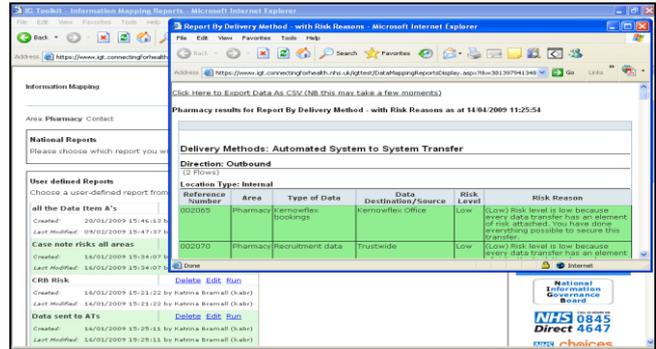4.   Select one of the options.

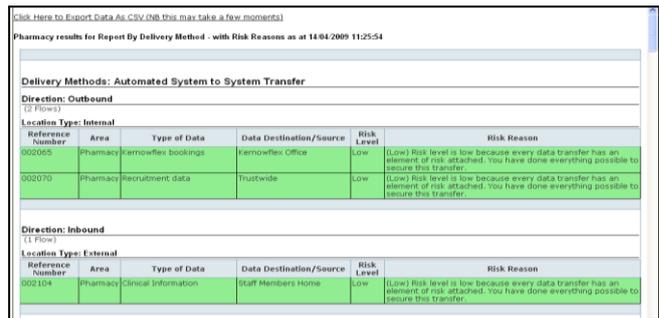5.   You will then see this screen to show the report is in progress.

6.   A few examples of the reports follow:

Report by Delivery Method (with Risk Reasons)

7.   The report is shown on screen and risks are colour coded red, amber or green depending on the risk level. The reason that a flow has been allocated to a particular risk level is also shown.

8.   The report shows the delivery method, the direction of the flow, i.e. inbound or outbound and the location type (internal or external). The data can be printed from screen or exported to a CSV file.

Report by Direction (with Risk Reasons

9.   This shows the report exported to CSV file.

User Defined Reports

10.   These reports enable the user define specific reports which can be named and saved for future use.

There are three steps to creating these reports. Users choose:

- the criteria to be included
- the fields to display in the report
- the headings to sort by

How to Create Your Own Report

11.   Select "Define a New Report"
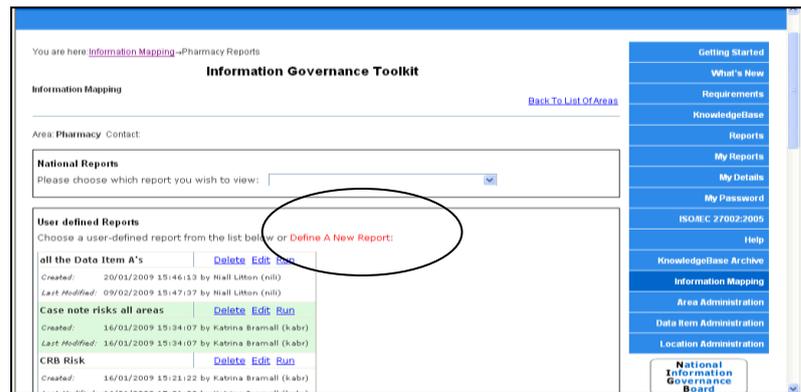
Step 1: Choose the Report Criteria

Note: If criteria are left BLANK then ALL flows will be included. If you select one or more criteria, then only those flows which match those criteria will be included in the report.

Choose Risk Level, Direction and Data Item

- Tick one or more Risk Level(s)

- Click on "inbound", "outbound" or "any"

- Click "Select" next to "Data Items", a pop up box appears; tick the boxes you want and click 'OK'
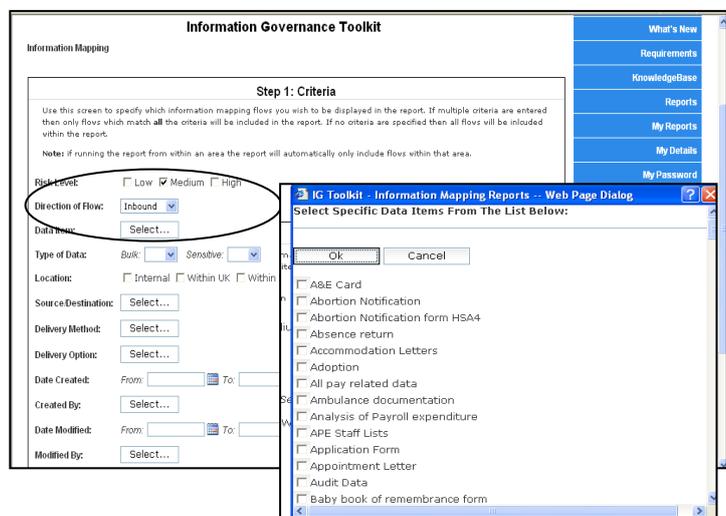
Choose Type of Data and Location

12.   Specify whether the data is bulk and / or sensitive, and whether it is being transferred internally, within the UK, within the EEA or outside the EEA.

Choose the Transfer Destination

13.   Click "Select" next to "Source Destination" [the list revealed is linked to the location choice you made on the previous screen].

14.   Select the destination(s) you require from the pop-up box and click "OK".

Choose the Delivery Method

15.   Click "Select" next to "Delivery Method"

16.   Choose the item(s) you require from the pop-up box and click "OK".

Choose the Delivery Option(s)

17.   Provide further detail on the method of delivery chosen on the previous screen:

18.   Click "**Select**" next to "Delivery Option", choose the options and click "OK".

Choose Dates and Creators

19.   '**Date Created**' - choose the date period in which the mapping flows were entered.

20.   '**Created By**' - choose the person(s) who entered the flow from the pop-up box and click "OK".

21.   '**Date Modified**' - choose the period that the flow was modified [may be useful to identify that the information entered has been modified / updated]

22.   '**Modified By**' - Click "**Select**" and choose the name of the person who modified the information flow – then click "OK" [may be useful to check updated have been completed].

23.   Click '**Next**'

Step 2: Choose the Report Content and Order

24.   The reports are displayed as a table (and can be exported into a spreadsheet). This screen enables customise the order and contents (fields) that you want in the report.

25.   The right-hand box "**Display These Fields**" is pre-populated with some fields.

26.   These fields appear in the report in the same order they appear in this list.

27.   The top four fields can be used to 'sort' the results (Step 3).

28.   You can move fields by:

- **Single** - select an item then:

  o   use the single arrow (**> < ΛV**) to move it between left and right box in the direction of the arrow
  o   use the double arrows (**ΛΛ** and **VV**) to move an item to the top or the bottom of the list

- **All** - use the double arrows (**>>** and **<<**) to move the entire list to the left or to the right.

Step 3: Choose the Report Headings

29.   The report will be ordered in ascending order of the first four fields. The order can be changed by selecting the relevant check box:

- '**Order in Reverse'** - sorts in descending order for that field

- '**Make into Heading'** - makes a field into a column heading [note that headings must be defined in order e.g. the second field cannot be made into a heading unless the first field is also a heading]

- '**Totals For Heading'** - includes a total of the number of flows within a given heading

- '**Include Overall Total'** - includes a total count of all the flows within the report

- Click '**Next'**

Saving a User Defined Report

30.   If you wish to save your defined report for future use.

- Enter a unique descriptive name [this name will be displayed on the report selection screen]

- Click the 'Finish' button

31.   Your defined report will be saved and you will be returned to the report selection screen, from where you can run your report.

Run, Delete or Edit User Defined Reports

32.   Delete, edit and run new report and all previously defined reports from this page.

33.   The fields you defined at steps 1 and/or 2 are replicated in the report, which as before can also be exported into a CSV file.