

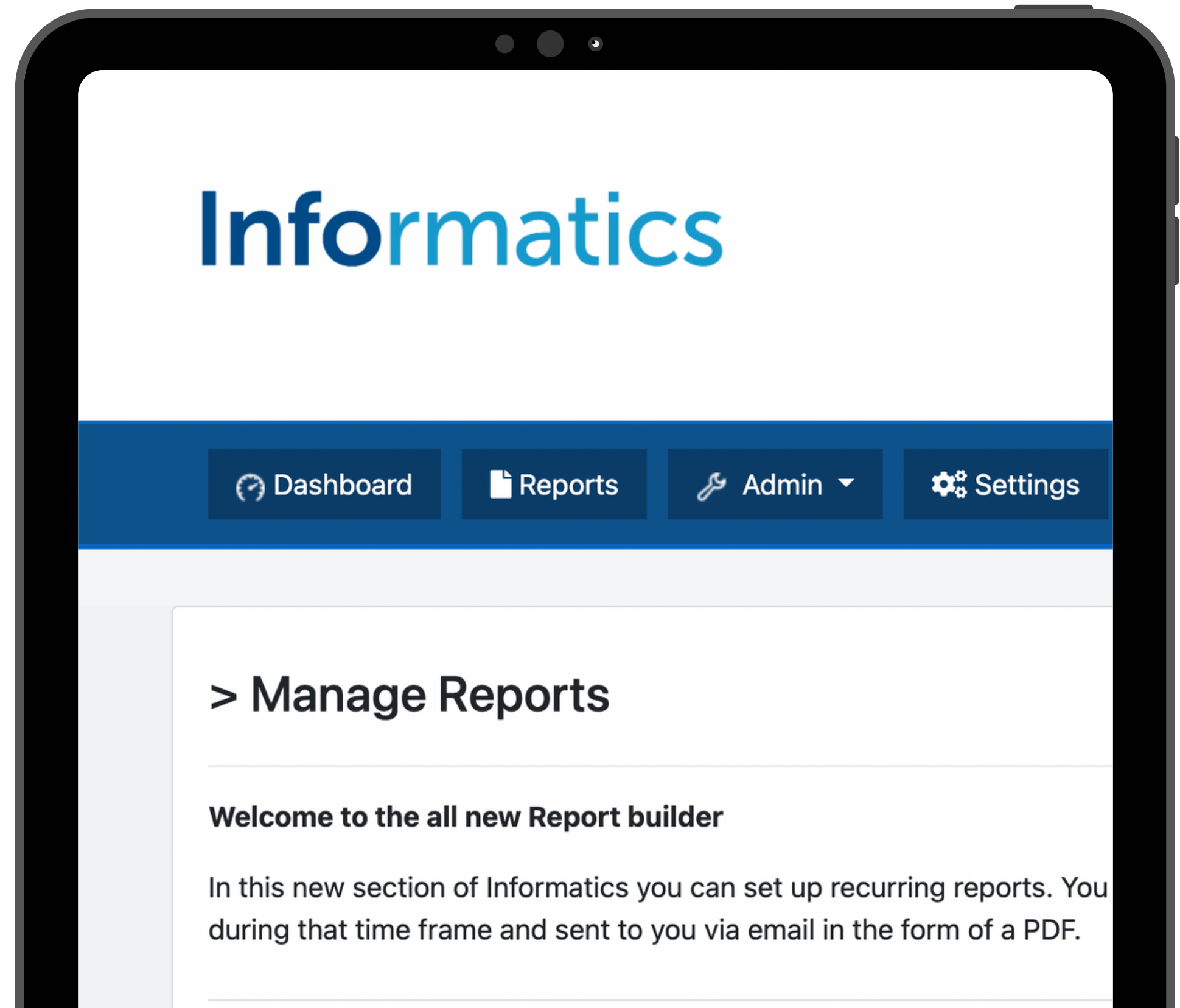
# Informatics

## Report Generator

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## What we're going to cover:

- Introduction to the Report Generator
- How it works
- Explaining timings



## Report Generator

Informatics is a brilliant tool to analyse your data from the Feedback Centre and other platforms. It allows you to produce charts, check the latest themes and get an idea of how members of the public are feeling about health and social care by using sentiment analysis.

One thing has always been missing from Informatics and that is the ability to produce reports and download them as a PDF. Well, from June 2022 onwards this feature will be available in Informatics.

## How does it work?

Each report is individually created by yourselves, then, depending on the timings that you have selected it will get automatically generated and emailed as a PDF to the chosen email address.

Our report generator combines all the queries performed in the dashboard and analyses the data to produce a PDF. This can often take some time so it will be emailed to you in the form of a link.

## Accessing Reports

To access the new report module you can click the Reports tab on your Informatics portal. If this isn't available, please get in touch at [support@wearewhitebear.com](mailto:support@wearewhitebear.com)

Click here

The screenshot displays the Informatics portal interface. At the top, the 'Informatics' logo is on the left, and the user is logged in as 'Rebecca Turner (White Bear)' with a 'Logout' button on the right. Below the login information is a 'Healthwatch:' dropdown menu currently set to 'Healthwatch Norfolk'. The main navigation bar is dark blue and contains four tabs: 'Dashboard', 'Reports', 'Admin', and 'Settings'. The 'Reports' tab is circled in red, and a red arrow points from the text 'Click here' to it. Below the navigation bar, a white box contains a welcome message: 'Welcome to Informatics', 'Hello there Rebecca Turner (White Bear),', and 'Welcome to the all new Informatics, this screen works as a quick snapshot of the current data for Healthwatch Norfolk'. At the bottom of this box are two buttons: 'Add a new User' and 'Import Reviews'. The bottom of the page shows the number '15610' and a row of five stars, with the first three being yellow and the last two being grey.

Informatics

Logged in: Rebecca Turner (White Bear)  
Logout

Healthwatch:  
Healthwatch Norfolk

Dashboard Reports Admin Settings

Welcome to Informatics  
Hello there Rebecca Turner (White Bear),  
Welcome to the all new Informatics, this screen works as a quick snapshot of the current data for Healthwatch Norfolk

Add a new User Import Reviews

15610

★★★★★



To preview what the report looks like (generated using test data) click this icon

Any reports you have already created will be listed here. If you haven't created any yet then this list will be empty

To create a report click 'Add new Report'

Use these icons to edit and delete your report

Once the report has been generated this icon will be clickable and green.

Informatics

Logged in: Rebecca Turner (White Bear)  
Logout

Healthwatch:  
Healthwatch Norfolk

Dashboard

Reports

Admin

Settings

> Manage Reports

Add new Report

Welcome to the all new Report builder

In this new section of Informatics you can set up recurring reports. You can select a timing from Daily to Yearly, then the report will be generated during that time frame and sent to you via email in the form of a PDF.

ID	Title	Template	Timing				
3	Norfolk and Norwich University Hospital Feedback	feedback	monthly				
9	Bespoke Report - June 2022	feedback	bespoke				

Adding a new Report

May 2022

To add a new report, click 'Add Report' on the report management area. You'll then be taken to this form.

Title of your report - make sure its something unique and memorable.

Select the timing you want to use (more details on this on another page)

Select a template, at the moment only the Feedback template is available. We will be adding more over the coming weeks

If you'd like to add an introduction to the report you can, this will be added in a box at the top of the report.

You can upload your own report banner, if you don't the default one will be shown.

### Add a new Report (new)

Report Title:\*

Timing:\*

Select

Template:\*

Select

At the moment only one template is available - we will be adding more over the coming weeks once the trial period is in full swing

Report Introduction:

Paragraph

Upload Report Banner

This is where you can add a banner to the top of your report.  
(Recommended size: 1500px X 400px) if one is not uploaded then the default one will be shown.

Choose file

No file chosen

Select only one from below:

Category:

Select Category

(This will create a joint report for all reviews in this category - not individual reports for each service in the category)

Service Group:

Select Group

(This will create individual reports for each service in this group)

Service:

Select Service

Source:

Select Source

Notifications

Send reports to:

Add Report

Add a new Report (new)

Report Title:\*

Timing:\*

Select

Template:\*

Select

At the moment only one template is available - we will be adding more over the coming weeks once the trial period is in full swing

Report Introduction:

Paragraph

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Select only one from below:

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Select Category

(This will create a joint report for all reviews in this category - not individual reports for each service in the category)

Service Group:

Select Group

(This will create individual reports for each service in this group)

Service:

Select Service

Source:

Select Source

Notifications

Send reports to:

Add Report

Select only one of these.  
If you select Category, it will generate a grouped together report for that category. If you select a Service Group, it will create reports for each Service in that group.

We will be adding the ability to pick if you would like a grouped report or individual reports over the coming weeks.

The email you want your report to go to.  
If you'd like it to go to multiple, then separate each email with a comma.



Timings

May 2022

Daily

This will be generated at 9am for the previous day. Once the report has been generated (or multiple reports depending on filters) it will email a list of the reports to download.

Weekly

This will be generated at 9am on Monday for the previous week. Once the report has been generated (or multiple reports depending on filters) it will email a list of the reports to download.

Monthly

This will be generated at 9am on the 1st of every month for the previous month. Once the report has been generated (or multiple reports depending on filters) it will email a list of the reports to download.

Quarterly

This will be generated at 9am at the start of each quarter for the previous quarter. Once the report has been generated (or multiple reports depending on filters) it will email a list of the reports to download.

Bespoke

If you click 'Bespoke' you will be able to select the dates like so:

Timing:\*

Bespoke

From:

yy-mm-dd

To:

yy-mm-dd

Yearly

This will be generated at 9am at the start of each new financial year for the previous year. Once the report has been generated (or multiple reports depending on filters) it will email a list of the reports to download.

The report will be generated as soon as you his 'Save Report' this can take up to an hour, so you'll be emailed a link once its completed.

It is worth noting that you can only pick dates that are in the past and not the future.

## What does the report look like?

May 2022

