

## Management Reports Guidance

### Standard Reporting

#### Graph based reporting

1. Log in to MySafety
2. Click on the Management Reports Module
3. Choose report topic

*Note: graph based reports can be identified by this symbol*



4. Enter report title

*Note: this does not matter too much, unless you plan on saving the report for future use.*

5. Select date range

*Note: YTD = year to date*

6. Choose organisation hierarchy and move into right hand box by clicking the green plus.

*Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.*

*Note: to remove a previously made selection, select it and click on the red X.*

7. Choose location hierarchy and move into right hand box by clicking the green plus

*Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.*

*Note: to remove a previously made selection, select it and click on the red X.*

8. Select display options i.e. chart, data or both
9. Choose filter criteria

*Note: Only select filter criteria if necessary, if you would like to view all data, do not make any selections*

10. Choose run options

*Note: options available – PDF, pop-out webpage, excel*

## Data extract based reporting

1. Log in to MySafety
2. Click on the Management Reports Module
3. Choose report topic

Note: data extract based reports can be identified by this symbol



4. Enter report title

Note: this does not matter too much, unless you plan on saving the report for future use.

5. Select date range

Note: YTD = year to date

6. Choose organisation hierarchy and move into right hand box by clicking the green plus.

Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.

Note: to remove a previously made selection, select it and click on the red X.

7. Choose location hierarchy and move into right hand box by clicking the green plus

Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.

Note: to remove a previously made selection, select it and click on the red X.

8. Choose filter criteria

Note: Only select filter criteria if necessary, if you would like to view all data, do not make any selections

9. Choose run options

Note: options available – excel

## **Text/register based reporting**

1. Log in to MySafety
2. Click on the Management Reports Module
3. Choose report topic

*Note: data extract based reports can be identified by this symbol*



4. Enter report title

*Note: this does not matter too much, unless you plan on saving the report for future use.*

5. Select date range

*Note: YTD = year to date*

6. Choose organisation hierarchy and move into right hand box by clicking the green plus.

*Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.*

*Note: to remove a previously made selection, select it and click on the red X.*

7. Choose location hierarchy and move into right hand box by clicking the green plus

*Note: If you select 'ALL' in the dropdowns you will only return individual records that have been expressly marked in their fields as applying 'ALL'. It does not mean it will return ALL records. If you wish to return all records under a certain hierarchy tier, you should leave the tiers below blank.*

*Note: to remove a previously made selection, select it and click on the red X.*

8. Choose filter criteria

*Note: Only select filter criteria if necessary, if you would like to view all data, do not make any selections*

9. Choose run options

*Note: options available – PDF, pop-out webpage, excel*

## Advanced Reporting

### Query Builder

1. Log in to MySafety
2. Click on the Management Reports Module
3. Switch to advanced reporting tab
4. Click on 'QueryBuilder'

*Note: a new window will open*

5. Choose data source

*Note: Once you have selected this, further criteria will appear*

6. Choose filter criteria
7. Select 'LIKE'
8. Enter free text between two percentage signs e.g. %humanities%

*Note: adding percentage signs will allow the search to be more flexible*

9. Select output columns

*Note: this will depend on how much information you require. Each output column will display as a data column in the excel spreadsheet*

10. Click run query
11. Click export
12. Click ok to note 'Export complete. Click on link to save the file'
13. Click on 'click here to save the export'
14. Open downloaded excel document