Guide to Running Intrepid Reports

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Running Standard Trainee data reports

Standard reports are reports that have been written by Hicom the system developers for the use of all users across the Deaneries. The Deanery cannot amend the selection criteria or the output but they are very simple reports for providing information to users.

From the Home Page, click on Report Menu
The main reports are highlighted below:

- Trainee list – list of all trainees in post on set date
- Leave – Study leave summary
- Individual Summary – Study leave details for an individual
- Vacancy Matrix – All trainees in post over 1-12 months by post in matrix format to export to Excel
Trainee Report

Click on Trainee list and select the relevant trust, grade and specialty. Multiple options can be selected in each drop down list. If you want to see all trainees in the trust you only need to select the Trust. By default the date that it will run data for is always already in as today’s date.

There are several reports that can be run from the trainee list and they are as follows:-

**Trainees in post on a specific date** – ensure that you include a date which could be past, today or future

**New starters on a set date** – this will show you all staff who are new to the specified trust on a date and it will highlight them. For example if you want to see all new starters in the month of the start date then you need to enter ‘1’. This will show you all trainees who are new the trust in December and were not in post in November.

**New starters only** – this will show you a list of only new starters according to the months given. For example if you state 01/12/2010 and 2 months for new starters it will show all trainees who start in the trust 01/12/2010 but were not in post 01/10/2010. Each trust will have a different guideline as to what classifies a new starter.

**Including ESR Vacancy reference** – this is useful for Trusts who are using the ESR interface as it will show who is in post on a specific date and who we have mapped to ESR at any point.

**Any variation of the above can be used to create the required report**
Study Leave Reports

The Leave report shows both the financial commitment (estimated and actual) and the allocation of days per trust. It will show you each individual trainee’s applications and current status of the application.

Click on ‘Leave’ report and select the relevant trust, grade and specialty. Multiple options can be selected in each drop down list. The relevant dates need to be selected and ensure that only Study leave ticked.
Individual Study Leave Report

Click on Individual Summary and then select the individuals name from the drop down list. You can filter by trust and specialty to filter down the names available. Add the period of time that you want to see and it can be any dates not just training year or financial year.
Vacancy matrix report

This report is useful when looking at the trainees in a post over a period of time. By running the post matrix and staff matrix at the same time it will show trainees in post over the period of time requested using one spreadsheet work book for posts and another for trainees. The data has to be exported to Excel so once the filters have been selected click on Excel. It will check that you want to export all data and just click OK.
### Process
Running Analysis Reports

### Timescale
Within two days of trainees rotation or as requested at a national or local level

### Role
The Deanery will often set up the report for the User to ‘Save As’ their own

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**Analysis Reports**

Analysis reports are used primarily by the Information team to manage local and national data returns. The data exported is ‘real time’ and all fields that are on Intrepid can be exported using this format. Several reports have been written by the team for the use of trusts and if additional reports are needed then they will be added to for collection as detailed below.

To access Analysis, click on Hosp Analysis tab

![Image of Intrepid Database](image)

Say ‘No’ to the message that pops up

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*POL/REPORTING/TX/V1.doc*
Select Query tab and then open
As you create your reports you will have your own collection, but until the you will need to use other peoples reports. You cannot change or delete another users details but you can save as your own. Click 'all' and then double click on the report that you want. Trust reports are clearly named.
The selection criteria is the filter for the data that you want to see for example, All Wessex trainees in post on 04/08/2010 and in winchester (WEHCT). To change the criteria you need to double click on the field and reselect i.e. different trust of dates.
The report criterion is what you want to see in the report i.e name, gmc, gender, grade, site specialty. The reports on the system have been created to fit on an A4 sheet for reporting but if you want to export to Excel then you can add as many fields as you want. To add fields to the output click on the field you want and drag to the Description list. You can drag the order up and down. To remove right click on the field and 'remove from output'.
Within the analysis page there are the following buttons:

- **Run** – this calculates how many records it has picked up and it is a good way of seeing if the report looks to be correct if you know what to expect.

- **Print and Preview** – these are in the Report tab.

- **Export** - To Export to Excel you need to click on Export tab, and select file path by clicking on file male tab. Then save and click on Export.
Process  Saving reports as favorites

If you frequently run any of these reports then save them as favorites. Wherever you see a yellow folder it means you can save for future reference. When clicked, you will get a message to ask you to name the report. Once named, click OK and always omit the saving of dates if you see the message. The report will now be available from your front homepage.
Process: Printing and Previewing a Report

To Preview the report click on Preview button and it will create the document in a Word format.

To print, the report click on Print button or from the previewed word document screen click on the print icon at the top left hand corner.

Process: Outputting a report to Excel

Any report can be exported into Excel which allows manipulation of data.

To export a report it can be completed clicking on the ‘Report’ button from the preview page or from the ‘Output’ tab as highlighted on Page 5. Both will take the user to the same screen where the ‘Output to’ box appears. Click on ‘Microsoft Excel 97-2002’ and then ‘OK’
The page will then link to your computer files and you will need to select where you want to save the file. If this does not appear then you need to ensure that when you log on you tick to say that you want to see all drives. Small screen shot shows log on page.
### Training Guide Verification

<table>
<thead>
<tr>
<th>Reviewed by</th>
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<tbody>
<tr>
<td>Date</td>
<td>16/09/2011</td>
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<tr>
<td>Tested by</td>
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