

HOW TO RUN YOUR REPORTS (STATISTICAL) IN THE INCIDENT MODULE

Supervisors and Managers will be able to produce statistical reports on Incidents in their service area.

Step 1: Access the Assure Health & Safety Management System using the following link: <https://www.sheassure.net/coventrycc/Login> and log onto the system.

The Home Page will be displayed:



Step 2: Click on the Modules tab and select > Incident and then >Incident Record

The following screen will be displayed:

Home → Incident → Incident Record

Incident Record

[+ New Record](#)

Filters ▾ Reports ▾

Reference:
3

Org Unit:
Business Service Centre 2

Incident Date:
23/10/2015

Type of Incident:
Accident

Incident Details:
IP fell from the table wh...

Incident Severity:
Fatality

☆ (8)
🔗 (1)
📌 (0)

🗑️ ? ✓ 📄 ⚙️

Review Date: No Review Set

Last Edited: 17/11/2015 00:45:17

Step 3: Click on the **Filters** icon, which will show the following sub section:

Filters ▾ Reports ▾

Please select a filter... ▾

Manage Filters

Archived Records: ☐

Records Per Page: 1 ▾

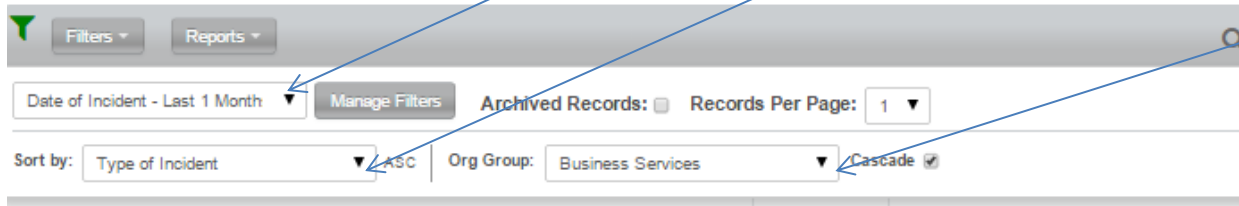
Sort by: Date Created ▾ ASC | Org Group: Please select an Org Group... ▾

The system allows you to use an existing filter or create new filters to run various reports. As Supervisors and Managers the following **default** filters will be sufficient for you:

- Date of Incident – Last 1 month
- Date of Incident – Last 3 months
- Date of Incident – Last 6 months

If you require more bespoke reports, please email [AssureHelpDesk](#) with your requirements.

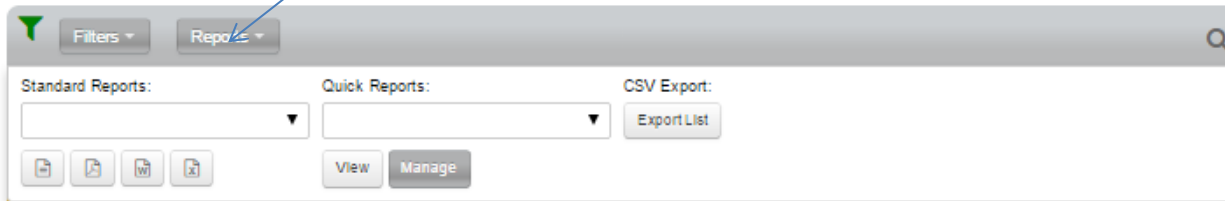
Step 4: Select the **Date of Incident – Last 1 month** filter. Sort by: **Type of Incident** and Select your service area from the **Org Group** field as shown below:



The screenshot shows a web application interface with a top navigation bar containing a green icon, a 'Filters' dropdown, and a 'Reports' dropdown. Below this, a search bar is visible. The main content area includes a filter selection dropdown set to 'Date of Incident - Last 1 Month', a 'Manage Filters' button, an 'Archived Records' checkbox, and a 'Records Per Page' dropdown set to '1'. Below these, the 'Sort by' section is set to 'Type of Incident' with an 'ASC' indicator, and the 'Org Group' dropdown is set to 'Business Services' with a 'Cascade' checkbox checked. Blue arrows from the text above point to the 'Date of Incident - Last 1 Month' filter, the 'Type of Incident' sort option, and the 'Business Services' Org Group dropdown.

When you have selected the filter, the green icon will appear on the left of the **FILTERS** Box to indicate the records have been filtered. To remove the filter and return all your records, click on the icon again.

Step 5: Now click on the **Reports** Icon. The following screen is displayed



The screenshot shows the 'Reports' section of the application. The top navigation bar has the 'Reports' dropdown selected. The main content area is divided into three sections: 'Standard Reports' with a dropdown menu, 'Quick Reports' with a dropdown menu, and 'CSV Export' with an 'Export List' button. Below these sections are four document icons, a 'View' button, and a 'Manage' button. A blue arrow from the text above points to the 'Reports' dropdown in the navigation bar.

Step 6: In the Standard Reports field, select the option called **Configurable Breakdown by Status Report**

The screenshot shows the 'Standard Reports' section with a dropdown menu set to 'Configurable Breakdown By Status'. Below it, there is a 'Group By' dropdown set to 'Age Range'. To the right, there are 'Quick Reports' and 'CSV Export' sections. At the bottom, there are icons for PDF, Word, and Excel.

Step 7: Now change the Group By filter and select the option called **Type of Incident**. Your screen should now look like this:

The screenshot shows the 'Standard Reports' section with a dropdown menu set to 'Type of Incident'. Below it, there is a 'Group By' dropdown set to 'Age Range'. To the right, there are 'Quick Reports' and 'CSV Export' sections. At the bottom, there are icons for PDF, Word, and Excel.

Step 8: Choose how you want to view your report. You can view your report **In Viewer, PDF format, Word or Excel**, depending on which icon you select as shown.

Using the above filters and selecting Excel, the sample report below is produced:

						Breakdown by Who Was Involved
Type of Incident	Total Incidents	RIDDOR	Lost Time	Days Lost	Near Miss	Employee
Accident	1	0	0	0	0	1
Total	1	0	0	0	0	1

You can also run a report that provides a breakdown of Incidents by Date. Keep the same filter as above but in the Standard Reports section select **Configurable Breakdown by Date**. Here is a sample of the report run in Word:

Year	Month	Total Incidents	RIDDOR	Lost Time	Days Lost	Near Miss	Breakdown By Type of Incident		
							Accident	Violence & Aggression	Near Miss
2016	Jan	1	0	0	0.00	0	1		
	Total	1	0	0	0.00	0	1		
2015	Oct	18	0	5	0.00	0	10	5	3
	Nov	38	0	4	0.00	0	32	2	4
	Dec	3	0	0	0.00	0	2	1	
	Total	59	0	9	0.00	0	44	8	7
Total		60	0	9	0.00	0	45	8	7

If you are unsure of which report you need to select or are having any problems with retrieving your data, please contact AssureHelpDesk. Ext 1198.