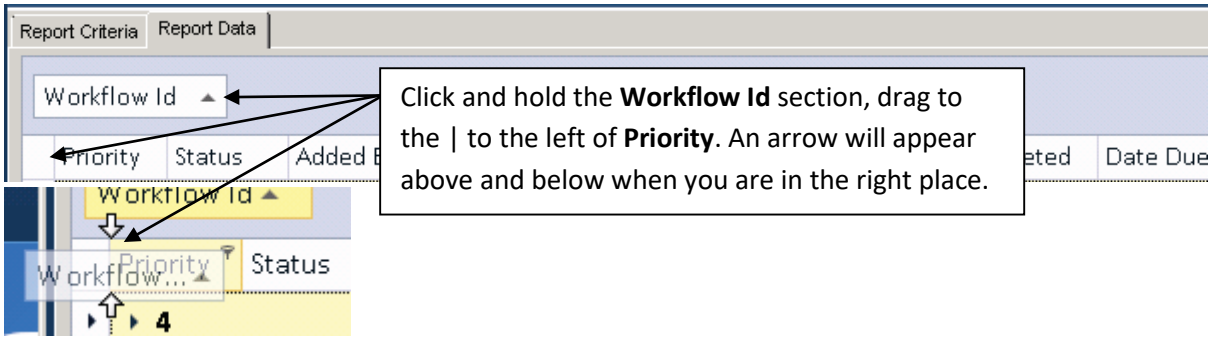
Healthcare Improvement Scotland

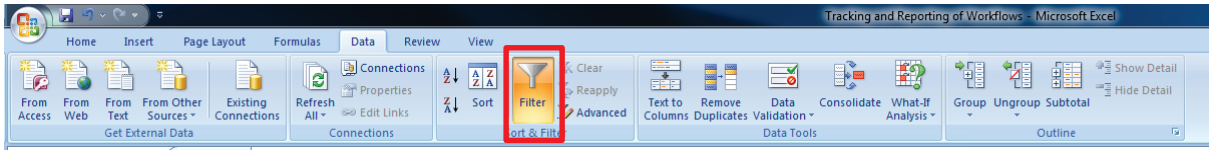
Updating Docman Reporting Spreadsheet

1. In Docman, go to Reporting.
2. Click on Predefined Reports.
3. Click on Tracking and Reporting of Workflows.
4. Set your dates for Documents Completed and Run Report.
5. Drag Workflow ID from top bar to left of columns (so that it shows as the first column).

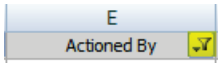


6. Export to Excel.
7. Open Excel document.
8. Select all (keyboard shortcut Ctrl+A) and copy (Ctrl+C).
9. Open Tracking and Reporting of Workflows.xlsx.
10. On Data tab, click cell A1 and then Paste (Ctrl+V) in your own data.

11. Go to the **Data** tab in Excel and click on **Filter**.



12. Go to **Actioned By** header



Open the drop down menu and filter the names shown by selecting all names *except* doctors, nurses, and pharmacist. Wait for Excel to finish calculating.
The office staff names should be the only names visible under the **Actioned By** header now.

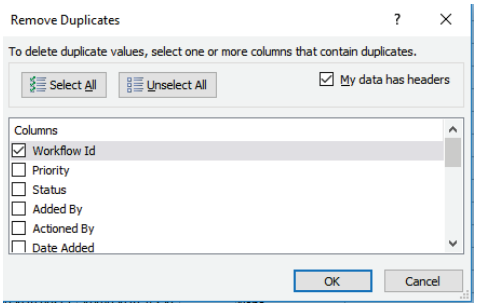
13. Select all the cells by clicking the grey box for row 2 and dragging down to the last row. This will select the whole row - Do not use "Select All" in this case as we *do not* want to remove the headers.

14. Right click and select **Delete Row**. Wait for excel to finish calculating.

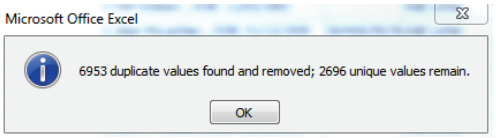
15. Go to **Actioned By** header.
Open the drop down menu, click "select all" and click "OK".

16. Click in the **Audit Date** column then press  to sort by date/time.

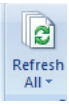
17. Click **Remove Duplicates** 



Click "Unselect All" and re-select "Workflow ID". Click "OK".
The following window should open.



Click "OK" and wait for excel to finish calculating.

18. Click **Data** tab at top. Click on Refresh All. 

19. The tabs **Letter Types**, **Results Table**, and **Results Chart** will now be updated with appropriate figures for this month. Save the spreadsheet as a new month.

Published July 2019



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