

The 'Reports' tab enables an organisation to extract detailed information about the ISAs and DPCs that are associated with their organisation. Information on the reports can be viewed on the screen or can be exported into excel to be manipulated as the user wishes.

In addition to the reporting functionality in the 'Reporting' tab, users also have the ability to export information about the ISAs and DPCs that their organisation is hosting or participating in.

Export to Excel

The 'ISA – Registry', 'ISA – Management' and the 'DPC' tabs all contain tabular information about the ISAs and DPCs. This information can be extracted from the DCC into an Excel file for viewing and analysis.

Dashboard ISA - Registry ISA - Management DPC Data Sharing Activity Organisation Profile User Preferences Reports														
ISA - Registry 🛛														
Agreement Title / Reference	All Status		٣	All DPC Status	• All	Dpia Status		• All	Risk Rating		• Choo	Choose Services		
All Data Templates 🔹	All Data Sections		٣	All e-ISA Status	*									
	Filters Cent Filters													
Creater New														
Export to Excel	Export to Excel													
							Par	ticipant Status			DPC			
Title	From Date	To Date	Status	DPIA	Risk	Active	Pending	Incoming	Associated	Host	Pending	Active		
Drop1 TESTISA2	01-Oct-2018	No end date	Live	Completed Digitally	Green	1	0	0	0	0	0	0	Clone	PDF
 NCL Trauma OCT 18 	29-Oct-2018	29-Oct-2019	Live	Completed Digitally	Green	1	0	0	0	0	0	0	Clone	PDF
ORG2ISA Test2910	29-Oct-2018	No end date	Draft	Required	Unknown	0	0	0	0	0	0	0	Clone	PDF
 Isafaestgaet 	02-Nov-2018	No end date	Draft	Completed Digitally	Unknown	0	0	0	0	0	0	0	Clone	PDF
 Pan London 	01-Nov-2018	No end date	Live	Completed Digitally	Green	0	0	0	0	0	0	0	Clone	PDF
2nd Pan London Training ISA	19-Nov-2018	31-Mar-2019	Draft	Completed Digitally	Red	0	0	0	0	1	0	0	Clone	PDF
Drop2 TestISA 1911 Clone	19-Nov-2018	No end date	Draft	Required	Amber	0	0	0	0	0	0	0	Clone	PDF
													1 - 7	of 7 items

- 1. On top of each table, select the Export to Excel (Description Excel) button
- 2. When prompted, Save the file onto your local drive then open it

1		В	C	D	E	F	G	H	1	J	K		
1	Titlo	From Dato	To Data	DDIA		Partic	Participant Status						
2					Active 🔽	Pending 🔽	Incoming 🔽	Associated 💌	Host 💌	Part Pending 🔄	Part Active 💌		
3 Rajes	h 23rc Oct OSU Email test	23/10/2017	25/12/2017	Required	0	3	0	1	1		0 0		
4 Test	SA-MH	05/11/2017		Required	0	5	0	1	1		0 0		
5 DPIA	Nov 09 Data1	09/11/2017		Not Required - Historic	0	0	0	0	0		0 0		
6 DPIA	Nov 09 data 2	09/11/2017		Completed by Upload	0	0	0	0	0	(0 0		
7 DPIA	Nov 09 Data 3	09/11/2017		Not Required - Checklist	0	0	0	0	3		0 0		

1. Selecting the **Export to Excel** (Export to Excel) button will download all of the Information Sharing Agreement details that your organisation is hosting which will

contain information such as:

- a. ISA title
- b. Start and End dates
- c. The DPIAs that have status: Checklist Required, Not-Required Historic, Required, Completed Digitally, Completed by Upload
- d. The ISAs that have number of participants who are: Active, Pending, with Incoming requests and third party Associates



- e. The number of DPCs that are:
 - i. hosted by your organisation
 - ii. another organisation has added and
 - iii. how many of these DPCs you have approved

ISA - Management (My ISA - Management) tab

ſ		А	В	С	D	E	F	G	Н		J
	1	Create Date 🔽	Title 🔽	Organisation 📃 🔽	From Date 💌	To Date 💌	Status 🔽	DPIA 💌	DPC Count 💌	My Org DPC 🔽	Message 🔽
	2	19/10/2017	ISA 1	TEST OSU ORG1	31/08/2017		REQUESTEDMY	Completed by Upload	2	. 0	
	3	20/11/2017	DPIA Nov 20 data 3	TEST OSU ORG1	20/11/2017		ACTIVE	Not Required - Historic	0	0	
	4	20/11/2017	021117 DR ISA	TEST OSU ORG1	03/11/2017		UNDERCONSIDERATION	Checklist Required	1	. 0	
I	5	20/11/2017	DPIA Nov 09 Test data 02	TEST OSU ORG1	09/11/2017		ACTIVE	Completed by Upload	0	0	
	6	20/11/2017	DR 091117 17.16	TEST OSU ORG1	09/11/2017	30/11/2017	REJECTED	Completed Digitally	0	0	
I	7	20/11/2017	DPIA Nov 09 Data3	TEST OSU ORG1	09/11/2017	21/09/2018	ACTIVE	Not Required - Checklist	0	0	
L	-										

2. Selecting the Export to Excel (Description Excel) button will download all of the

Information Sharing Agreements details that your organisation is participating in which will contain information such as:

- a. ISA Title
- b. The hosting organisation name
- c. Valid from and to dates
- d. The status of the ISA you are participating in
- e. The total number of DPCs that are attached to the ISAs you are participating in
- f. The number of DPCs that your organisation has associated with each ISA
- g. Any messages which informs you if an action is required by your organisation

DPC tab

- 3. Selecting the **Export to Excel** button will download all of the Data Processing Contract information that your organisation is hosting which will contain information such as:
 - a. Title of the DPC
 - b. The type of DPC
 - c. The number of ISAs each DPC is associated with
 - d. And the Valid From and To dates

Title 💌	Туре 🔽	ISAs 💌	From Date 🛛 💌	To Date 📃 💌
GP Practice 1 - DPC		4	01/10/2017	12/10/2017
NHS E - DPC		1	06/10/2017	08/10/2017
Hospital 1 - Data Processing Contract		3	01/10/2017	12/10/2017
Jana DPC		3	10/10/2017	31/10/2017



Non-Registered Organisations Report

Dashboard	ISA - Registry	ISA - Management	DPC	Data Sharing	Activity	Organisation Profile	User Preferences	Reports
Reports		Report Type		alact Dapart				
			s	Select Report				
			E	xport DPCs				
			Ν	Ion Registered Organis	ations			
			S	Summary Report				

- 1. Click on 'Reports' tab from the navigation tabs. The 'Reports' screen is displayed and the Report Type drop-down field is displayed
- To show a detailed report of the Non-Registered Organisation associated with the ISAs your organisation is hosting, select the Non-Registered Organisations option from the 'Reports Type' drop-down select box

Dashboard	ISA - Registry	ISA - Ma	nagement	DPC	Data Flow	Activity	Organisation Profile	User Preferences	Reports				
Reports													
	Repo	Non Registered	Non Registered Organisations										
	From	dd/mm/yyyy			То	dd/mm/yyyy							
	Run Report												
	Non Registered Org	anisations [E	xport Report]										
	ISA Title	ISA Status	ISA Organisation	1	SA Region	NRO		NRO Dat	e				
	Any Qualified ISA1	Active	Any Qualified Partn	ier2 M	NWL	The CO-Operative P	harmacy (Cinderford) - FMG81	22 Feb 2	018				

- 3. You can narrow down your search by using the **From** and **To** calendar fields to display the dates a Non-Registered Organisation was added
- 4. Select the **Run Report** (**Run Report**) button to show a detailed list
- 5. To export the list to an Excel file, select the [Export Report] link above the table
- 6. The file will be downloaded onto your computer as 'Non-Registered Organisation.xlsx'. Once saved, open it to view the Non-Registered Organisation data



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	A		В	С	D	E	F	G	н	
1	ISA Title	-	ISA Status 💌	ISA Organisation 💌	ISA Region 💌	NRO	NRO Date 💌			
2	ISA 2		Active	TEST OSU ORG1	SEL	Specsavers Hearcare Group Limited	08 Aug 2017			
3	Trinity Care ISA	Version 2	Active	TEST OSU ORG1	SEL	Specsavers Hearcare Group Limited	20 Aug 2017			
4	Trinity Care ISA	Version 2	Active	TEST OSU ORG1	SEL	Limehouse Practice (F84054)	20 Aug 2017			
5										
6										
7										
8										
9										=
10										
11										
12										
13										
14										
15										
16										
17										
18										
19	() N Table	h /								►
Rez	adv Iable 21	2						0%		-+

Summary Report

The Summary Report displays useful information about the Organisation's hosted ISAs and DPCs and the ISAs and that the organisation is participating in along with any DPCs associates with it.

Dashboard	ISA - Registry	ISA - Management	DPC	Data Sharing	Activity	Organisation Profile	User Preferences	Reports		
Reports										
		Report Type		0						
				Summary Report					•	
						Run Report				
	Cummers (Europe	Depert								
	Summary (Expon	Reportj								
	Metric								Count	
	Number of active ISAs									7
	Number of expired ISA	ls.								0
	Number of active DPC	s								2
	Number of expired DP	US								0
	Number of DPC to nos	ticleant ISA allocations								1
	Number of active partie	cipant ISA allocations								3
	Number of NRO partic	inants								0
	Participant Status	3								
	Participant Status							Count		
	Active									3
	Cancelled									2
	Draft									2
	ISA DPIA Status									
	Dpia Status							Count		
	Completed Digitally									6
	Required									1

- 1. To show a Summary Report, select the 'Summary Report' option from the 'Report Type' drop-down
- 2. Select the **Run Report** (**Run Report**) button to show a detailed list
- 3. To export the information into an Excel file, select the [Export Report] link above the table
- 4. The file will be downloaded onto your computer as 'Summary Report.xlsx'. Once saved, open it to view information about your hosted and participating ISA's related to your Organisation



5. Once open the 'Summary Report.xlsx' will contain five tabs within the Summary Report excel file; Summary, ISA, DPC to ISA and Participation. Click through each to view the corresponding data

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A	В	С	D	E	F	G	Н	
1 Metric	Count		Participant Status	Count		Dpia Status	Count	
2 Number of active ISAs	11		Active	5		Checklist Required	1	L
3 Number of expired ISAs	0		Associated	5		Completed by Upload	1	L
4 Number of active DPCs	2		Pending	19		Completed Digitally	5	;
5 Number of expired DPCs	1					Not Required - Checklist	1	L
6 Number of DPC to hosted ISA allocations	9					Not Required - Historic	1	L
7 Number of DPC to participant ISA allocations	0					Required	2	2
8 Number of active participants	5							
9 Number of NRO participants	5							
10								
11								
I I I I Summary / ISA / DPC / DPC to ISA /	Participa	ation 🏑 🖏						

Summary worksheet shows the status of the ISAs an organisation is hosting along with the status of all participating organisations within these ISAs

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	А	В	С	D	E	F	G	Н	I	
1	Reference	Title	Organisation	Region	Start Date	End Date	No End Date	Expiry Notification Date	Review Date	Expir
2	SEL/NOODS/102255	ISA 1	TEST OSU ORG1	SEL	31/08/2017		TRUE		18/10/2017	No Ex
3	SEL/NOODS/102256	ISA 2	TEST OSU ORG1	SEL	07/09/2017		TRUE		08/12/2017	No E
4	SEL/NOODS/102261	External ISA	TEST OSU ORG1	SEL	07/08/2017	30/09/2017	FALSE	31/08/2017		Expir
5	SEL/NOODS/102272	Sample ISA	TEST OSU ORG1	SEL	13/08/2017	20/08/2017	FALSE	20/08/2017		Expir
6	SEL/NOODS/102275	Trinity Care ISA - Version 2	TEST OSU ORG1	SEL	20/08/2017		TRUE		20/08/2018	No Ex
7	SEL/NOODS/102339	AtoS test1	TEST OSU ORG1	SEL	16/10/2017		TRUE		18/10/2017	No Ex
8	SEL/NOODS/102341	Atos_Test3 ISA	TEST OSU ORG1	SEL	16/10/2017		TRUE		31/12/2017	No Ex
9										
10				L,						-
.∎	🔹 🕨 📋 Summary 📜 Is	SA / DPC / DPC to ISA / Pa	articipation 🏑 💱 /	/						

ISA worksheet shows detailed information about each ISA an organisation is hosting.

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1	A	В	С	D	E	F	G	Н	-
1	Reference	Title	Organisation	Туре	Region	Start Date	End Date	No End Date	Expiry N
2	SEL/NOODS/102312/DPC	GP Practice 1 - DPC	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	FALSE	
3	SEL/NOODS/102315/DPC	NHS E - DPC	TEST OSU ORG1	Data Processing Contract	SEL	06/10/2017	08/10/2017	FALSE	
4	SEL/NOODS/102317/DPC	Hospital 1 - Data Processin	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	FALSE	
5	SEL/NOODS/102319/DPC	Jana DPC	TEST OSU ORG1	Data Processing Contract	SEL	10/10/2017	31/10/2017	FALSE	
6	SEL/NOODS/102326/DPC	DPC Test 2 Jana	TEST OSU ORG1	Data Processing Contract	SEL	12/10/2017		TRUE	
7	SEL/NOODS/102327/DPC	Test 3 DPC	TEST OSU ORG1	Data Processing Contract	SEL	12/10/2017		TRUE	
8	SEL/NOODS/102332/DPC	muhitul's DPC	TEST OSU ORG1	Data Processing Contract	SEL	02/10/2017	27/10/2017	FALSE	
9	SEL/NOODS/102333/DPC	fdsa	TEST OSU ORG1	Data Processing Contract	SEL	12/10/2017	12/10/2017	FALSE	
10	SEL/NOODS/102336/DPC	Nvanzi DPC	TEST OSU ORG1	Data Processing Contract	SEL	16/10/2017		TRUF	▼

The DPC worksheet shows detailed information about each of the DPCs that an organisation is hosting.



	N23 🔻 🦱	<i>f</i> ∗ Pending						~
	A	В	С	D	E	F	G	-
1	DPC Ref	DPC Title	DPC Organisation	DPC Type	DPC Org Region	DPC Start Date	DPC End Date	DPC N
2	SEL/NOODS/102312/DPC	GP Practice 1 - DPC	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F =
3	SEL/NOODS/102312/DPC	GP Practice 1 - DPC	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F
4	SEL/NOODS/102317/DPC	Hospital 1 - Data Processing	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F
5	SEL/NOODS/102317/DPC	Hospital 1 - Data Processing	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F
6	SEL/NOODS/102319/DPC	Jana DPC	TEST OSU ORG1	Data Processing Contract	SEL	10/10/2017	31/10/2017	F
7	SEL/NOODS/102312/DPC	GP Practice 1 - DPC	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F
8	SEL/NOODS/102315/DPC	NHS E - DPC	TEST OSU ORG1	Data Processing Contract	SEL	06/10/2017	08/10/2017	F
9	SEL/NOODS/102319/DPC	Jana DPC	TEST OSU ORG1	Data Processing Contract	SEL	10/10/2017	31/10/2017	F
10	0 SEL/NOODS/102312/DPC	GP Practice 1 - DPC	TEST OSU ORG1	Data Processing Contract	SEL	01/10/2017	12/10/2017	F
14	▲ ▶ ▶ Summary / ISA /	DPC DPC to ISA / Participa	ition 🦯 🔁 🦯					

The DPC to ISA worksheet shows detailed information on the relationship / links between your organisations DPCs to all ISAs that you are hosting or participating in.

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	Α	В	С	D	E	F	G	Н	
1	Reference	Title	ISA Organisation	ISA Region	Participant	Status	Created Date		
2	SEL/NOODS/102255	ISA 1	TEST OSU ORG1	SEL	TEST OSU ORG3	Pending	04/08/2017 13:26		=
3	SEL/NOODS/102256	ISA 2	TEST OSU ORG1	SEL	Jacob NHS trust	Pending	04/08/2017 13:27		
4	SEL/NOODS/102256	ISA 2	TEST OSU ORG1	SEL	0504_Firefox	Pending	04/08/2017 13:27		
5	SEL/NOODS/102261	External ISA	TEST OSU ORG1	SEL	TEST OSU ORG2	ISA Expired	07/08/2017 12:42		
6	SEL/NOODS/102256	ISA 2	TEST OSU ORG1	SEL	TEST OSU ORG2	Incoming Request	08/08/2017 10:24		
7	SEL/NOODS/102256	ISA 2	TEST OSU ORG1	SEL	TEST OSU ORG3	Pending	08/08/2017 10:24		
8	SEL/NOODS/102255	ISA 1	TEST OSU ORG1	SEL	TEST OSU ORG2	Pending	08/08/2017 10:25		
9	SEL/NOODS/102261	External ISA	TEST OSU ORG1	SEL	TEST OSU ORG3	ISA Expired	08/08/2017 10:26		
10	SEL/NOODS/102261	External ISA	TEST OSU ORG1	SEL	#delete-meg test1	ISA Expired	13/08/2017 18:56		

Participation worksheet shows detailed information about each ISA an organisation is participating in.

Export DPCs Report

Dashboard	ISA - Registry	ISA - Management	DPC	Data Sharing	Activity	Organisation Profile	User Preferences	Reports				
Reports		Report Type	ſ	Select Report						•		
				Select Report								
				Export DPCs Export ISAs								
				Non Registered Organisations								
				Summary Report								

- 1. Click on 'Reports' tab from the navigation tabs. The 'Reports' screen is displayed and the Report Type drop-down field is displayed
- To export to Excel a detailed report of the Data Processing Contracts (DPCs) associated with the ISAs your organisation is hosting or participating in, select the Export DPCs option from the 'Reports Type' drop-down select box



Dashboard	ISA - Registry	ISA - Management	DPC	Data Sharing	Activity	Organisation Profile	User Preferences	Reports		
Reports		Report Type	(Export DPCs						•
		Select fields								Manage Reports
		DPC Details								
		DPC Id Start Date Host Org Name		Referer End Da Host Or	ice te g Region	Ex	e piry Notification Date eated Date	De Re	escription eview Date	
		Processing Organisations								
		Name ICO Expiry DPO Email		Type IG Tool DPO PI	kit Status ione		IS Code IO First Name IO Mobile	DF	O Number PO Last Name otes	
		ISA Details								
		Reference Description		 Title Status 		Ho	st Org Name art Date	iii Ho iii En	ost Org Region Id Date	
		Document Details								•
		Title Reason		Type Size (Ki	B)	C De	scription	🗆 Ve	rsion	
		Set filters								
		AND OR	•						E	Add rule • Add group
						Run Report				

- 3. Select the fields you want displayed in the report using the checkboxes against each field
- 4. To select all fields in a section, select the checkbox in the section header
- 5. Filters can be applied (see **Section 19 Report Filtering** for an explanation of Report Filtering)
- 6. You can save the selection of fields to be used again if required by selecting the Manage Reports button

Manage Reports		×							
Using this function you can open, add, update and delete reports.									
Report	[New Report - Title Required]								
New Title									
	Open Save Delete Cancel								

- 7. Title your report and click the save button, the report will be available for future use using the Report drop-down list
- 8. Click the Run Report button to generate the report, once complete, save and open the report in Excel

Export ISAs Report

Dashboard	ISA - Registry	ISA - Management	DPC	Data Sharing	Activity	Organisation Profile	User Preferences	Reports				
Reports												
		Report Type	[Select Report							•	
				Select Report								
				Export DPCs								
				Export ISAs							_	
				Non Registered Organis	Non Registered Organisations							
				Summary Report	Summary Report							

1. Click on 'Reports' tab from the navigation tabs. The 'Reports' screen is displayed and the Report Type drop-down field is displayed



2. To export to Excel a detailed report of the Information Sharing Agreements (ISAs) associated with your organisation is hosting or participating in, select the **Export ISAs** option from the 'Reports Type' drop-down select box

				×	
	Report Type	Export ISAs			
		CAPUTIONS			
	Select fields				
	ISA Details				
	ISA Id Start Date Host Org Name Fair Process Detail Part Incoming Count		Reference Host Org Region OPIA Status Part Associated Count	Title Exply Notification Date Version Part Active Count Created Date	Background Review Date Fair Process Type Pair Broking Count Webste Publish Status
	W Risk Rating Related Details		U Status	U Host	
	III Regions		Services	Closed From	
	DPIA Details				
	Information Types Introduce new tech Intrusive contact Adult Definition People - SA Link Process - DSP Process - Privacy Shield Tech-R		New Data Privacy concerns Of the constant of	Popper P	Proyes One Discrete to rev orgs Discrete to rev orgs Projes-Direct SA Projes-Direct SA Projes-New IN France Prosess-New IN France Thete-10 Section Inste
	e-ISA Details			to rear decary	0.044
	Purpose Information Types Lawful Basis		Purpose Other Outside EEA IGA	Adult/Child Data U Outside EEA Other	Adult Definition Privacy Shield
	e-ISA Principles et al.				
	Principles		Agreements	Requirements	Assurances
	Statements of Sharing				
	SOS Title Config Detail Privacy Levels Exclude Codes Role Other		Sharing Arrangement Sharing For Care Settings RBAC Admin RBAC Other	Systems in use Access Methods Specialisms RAC Registered Data Sectors	System Config Data Formata Retention Policy RBAC Unnegistered
	Participating Organisations				
	Name ICO Number Postcode		□ Type □ ICO Expiry	 Status IG Toolkit Status 	ODS Code Region
	Contact Details				
	First Name Functions Notify		U Last Name Emai	Phone	Greement Role
	UPC Details				
	Description		Crg ruame Status	Start Date	End Date
	Document Details				
	I Reason		Size (KB)	U Description	U Version
	DPIA Risks and Issues				
	Date Owner Mitigating Details		■ Type ■ Likelhood	Status Impact	 Description Score
	Set filters				
	AND OR				E .

- 3. Select the fields you want displayed in the report using the checkboxes against each field
- 4. To select all fields in a section, select the checkbox in the section header
- 5. Filters can be applied (see **Section 19 Report Filtering** for an explanation of Report Filtering)
- 6. You can save the selection of fields to be used again if required by selecting the Manage Reports button

Manage Reports			×					
Using this function you can open, add, update and delete reports.								
Report	[New Report - Title Required]							
New Title								
	Open Save Delete Cancel							

- 7. Title your report and click the save button, the report will be available for future use using the Report drop-down list
- 8. Click the Run Report button to generate the report, once complete, save and open the report in Excel