



## Producing Data Reports from the Simplybook Booking Platform

To support the Covid-19 vaccination delivery

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## 1 Definition and Purpose

This booklet sets out the operational processes for system administrators to producing system data reports to support operational planning. It is important to note that as the Simplybook system is a live booking platform, data reports produced in advance, are subject to change as users make amendments.

Should you not be able to find the support you require within this document, please contact the [jbs.enquiries@miaa.nhs.uk](mailto:jbs.enquiries@miaa.nhs.uk) mailbox, where one of the team will be able to assist.

## 2 Booked Data Report

The booked data report can be used as the starting foundation to check bookings do not occur until the observed time delay between Covid 19 vaccination and Seasonal Flu vaccination events. The booked data report can also be used to support with clinical operational planning. This report is usually produced for a date range in the future.

### 2.1 Booking Report

#### **For users with Admin access and above**

Open your Simplybook account from the admin interface (using a website link).

Select '**Reports**' sidebar menu and then '**Booking Details**' report screen.

You will now need to set the parameters of the report you need to run:

- 'Date' range = date of interest
- 'Status' = '**non-cancelled** bookings'
- Next to the 'Export to Excel' button near the top of the screen, you will see a little table icon. Click on this and check all the boxes:

Once you have set the above parameters, click on '**Apply**'

Now click on '**export to excel**'. The report should download and open automatically. If it does not open automatically, double click on it from your 'download bar' at the bottom of your screen.

Open the file, and click '**Enable Editing**':

- Remove / delete first two rows

Save this file as '**Raw Booking Report – ddmmyyyy**'

## 3 Clinic Data Report

### 3.1 Reconciliation Report

The reconciliation data report can be used to capture all the booking information held on the system. This report is usually produced for a date range in the past.

#### **For users with Admin access and above**

Open your Simplybook account from the admin interface (using a website link).

Select '**Reports**' sidebar menu and then '**Booking Details**' report screen.

You will now need to set the parameters of the report you need to run:

- 'Date' range = date of interest
- 'Status' = '**show all bookings**'
- Next to the 'Export to Excel' button near the top of the screen, you will see a little table icon. Click on this and check all the boxes:

Once you have set the above parameters, click on '**Apply**'

Now click on '**export to excel**'. The report should download and open automatically. If it does not open automatically, double click on it from your 'download bar' at the bottom of your screen.

Open the file, and click '**Enable Editing**':

- Remove / delete first two rows

Save this file as '**Reconciliation Report – ddmmyyy**'