

Children's Centre Management Information System; CCM

CCM Superuser Guide

Family Services

Document control

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1. Introduction

The CCM superuser guide is aimed at children's centre managers, and staff that have been granted superuser access level on the system.

This guide is to be used in conjunction with the CCM online help.

Table 1 gives details of additional CCM guidance documents that are available.

Table 1: CCM Guidance documents

Document name	Audience
Basic Guide to CCM	<ul style="list-style-type: none"> All CCM users
CCM Framework and Data Guidance	<ul style="list-style-type: none"> All CCM users
CCM guide to recording Casework	<ul style="list-style-type: none"> Children's centre management team Family support workers CCM superusers

All CCM guidance documents can be downloaded from the CCM Support page:
www.barnet.gov.uk/wwcib/ccm-support

1.1. The role of the superuser

CCM superusers:

- act as the local system experts in their centres
- provide initial training to new CCM users in their centres
- provide the first level of support for CCM users in their centre
- have additional system access i.e. to merge duplicate records and casework
- be the main point of contact between CCM Support and the children's centre in relation to CCM
- are required to complete data quality and cleansing exercises
- run performance data reports.

The current list of CCM superusers can be found in the appendices of the CCM Framework and Data Guidance.

2. Providing training for new CCM users

2.1. Training resources

Training for new CCM users should be delivered locally by the CCM superuser using the CCM Portfolio of Documents and the CCM training system. Login details for the training system can be obtained from CCM Support.

For new users that require access to casework on CCM the CCM guide to recording casework should be used.

All of the guidance documentation can be downloaded from the CCM Support page:
www.barnet.gov.uk/wwcib/ccm-support

2.2. What to cover

When training new users the following should be covered:

1. The CCM Portfolio of Documents

- Inform the new user of the CCM Support service and how to log support calls
- Explain your role as the superuser
- Ensure that the user is aware of the data monitoring schedule i.e. that casework, registration forms and activity registers will be entered within 3 working days
- Explain data protection and security i.e. any information that can identify an individual i.e. name, should never be sent by email. Always use the identifier (ID) number when referring to individuals.

2. The Basic Guide to CCM

- Home page – explain what this shows
- Individual full details – give an overview of what information is stored on each tab
- Searching – performing a family/people search and how to include archived families
- Adding a family – train the user how to use the add family wizard
- Updating a family record – train the user how to update a record and move a family address
- Activities and sessions – ensure the new user is aware of the activity relationship table and knows how to categorise sessions. Show the user how to correctly input sessions and how to add attendees to the sessions
- Referrals – show the user how to add a new referral and how to close it and record an outcome.

3. CCM Guide to Recording Casework

- Adding a case
- Overview tab
- Linking key workers
- Actions
- Case attachments
- Case administration.

3. Merging duplicate records

It is almost inevitable that at some time or other you will find that the same person/family has been entered on to the system twice.

If they both have attendance information recorded against them, then the attendance details relating to the deleted individual would be removed from the system and no longer feature in future reports. The Merge Duplicates option protects against this loss by merging the attendance information and notes information before deleting one of the records.

From the Merge Duplicates option, you can search on name, address, date of birth or identifier as a starting point for identifying duplicate records. Nonetheless, we would recommend you identify and check the individual records involved via the People option under the 'Search' button in the side menu. Then you can view the full details of the individual records before choosing to Merge. This will be useful in confirming that you have identified the correct duplicate records as well as enabling you to decide which of the two records should be considered the master and remain without being deleted.

Please note: only the notes on the Individual / Personal Details tab (not the contents of the Note tab), Attendances, Referral and Requirements information is transferred automatically from the deleted record to the master record. It is essential, therefore, that you transfer manually any additional information you wish to keep from the record to be deleted in to the record that will remain.

After the records have been merged, the remaining record will inherit the oldest start date of the two records.

3.1. Identifying the source and destination records

Before performing a merge you must identify which record is the 'source data' and which record is the 'destination data'.

The source data will be the oldest record, which will be merged to the destination data.

The source data will have the oldest start date; this can be identified using the family summary report, or looking in the individual's full record on the personal tab.

The duplicate record with the most recent start date becomes the destination data as the information held on that record i.e. address and contact details are likely to be more up-to-date than the older record.

Please note: we would advise that you contact the family to double check the current contact details and address before performing the merge

After the records have been merged, the remaining record (destination data) will inherit the oldest start date of the two records.

3.2. Merge duplicate records

From the System Admin menu option in the Side Menu, click Merge Duplicates. You will see a screen similar to this:

The screenshot displays the 'Merge Duplicates' interface within the ChildView system. The sidebar on the left lists various system administration options, with 'Merge Duplicates' currently selected. The main content area features a 'Merge Duplicates' section with a 'Perform Merge' button. Below this, there are two parallel search forms for 'Source Data' and 'Destination Data'. Each form includes fields for Name, Address, D.O.B., and Identifier, with a 'Search' button to the right. At the bottom of each search form is a 'Selection Summary (40 results max)' box. The top of the interface shows the user is 'SysAdmin' and the site is 'Management Console'.

1. Use the 'Source Data' options at the top-left side of the merge duplicates screen and click the 'Search' button to locate your duplicated record.

Please note: You can search on a part or all of a DOB e.g. for everyone born in 'April 2010', type 'Apr 2010' in the box.



If you are merging a family that has been entered at two separate addresses, un-tick the link source and destination search to allow you to search for both addresses at the same time.

In its default setting, the Source and Destination names lists will be generated from the same single search criteria (in the example above, this was Julie B). But you can generate these lists independently of each other by un-ticking the 'Link Source and Destination Searches?' checkbox at the top of the screen. You could then search for Julia as the Source name and 'Julie' as the Destination name as an example.

- From the resulting lists, click on the duplicated record in the Source block (the one that will be deleted), then the duplicated record in the Destination block (the one into which the Source record will be merged).

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Management Console

HOME
Search
Attendance
Casework
Reports
Messaging
System Admin

Activity Manager
Audit Viewer
Correspondence Check
Edit Drop Downs
Key Workers
Merge Duplicates
Registration Options
Dynamic Content Options
Application Options
Field Definition
Confidentiality Group
Report Admin
Base Line Data Manager
Statistical Data
Barcodes
Resources

System Administration >> MERGE DUPLICATES

Perform Merge

Merge Duplicates

Link Source and Destination Searches? ☐

Source Data

Name: Julie B
Address: Duck Park
D.O.B.:
Identifier:

Destination Data

Name: Julie B
Address:
D.O.B.:
Identifier:

Search

Selection Summary (40 results max)

Name	DOB	Address	Identifier
Miss Julie Bryant	06/10/1962	9, Duck Park, Eastbourne	B000560
Ms Julie Bryant	06/10/1961	9, Duck Park, Eastbourne	BRY0060
Ms Julie Bryant	06/10/1962	9, Duck Park, Eastbourne	B000560

Site Admin

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The names and addresses of each will appear in the boxes at the bottom left- and right-hand sides of the screen.

- Click the '>>Perform Merge<<' button, at the bottom of the screen.
- You will be presented with a merge confirmation box. If you are sure you want to merge the duplicated records then press 'OK'.
- You will be presented with a 'Merge Complete' message confirming that the source name has been deleted from the database. However, the Notes, Attendances and Referrals information from the Source name will have already been transferred automatically to the Destination record.

Please note: If there is an open casework record attached to the source data record the casework record will not be merged to the destination data record. The casework record will not be deleted either, but you will have to re-attach it to the individuals records. Please refer to the CCM guide to recording casework for guidance on how to do this.

4. Attendance Review

The Attendance Review screen allows you to monitor and review attendances of specific activities or sessions. You can build your own queries and reports based upon attendances, targets etc., using a selection of built in filters. This screen provides the most flexible attendance review capabilities. You can set very detailed criteria and export the results directly to Excel, create a mailing list or produce an attendance analysis report.

Please remember, that this screen is based on attendances at activities or sessions and uses the status of people i.e. pregnancy status or address particulars, that were applicable at the time the person attended the session or activity.

Compare this with the 'Mail Merge & Data Extract' screen (see section 5), which is not based on attendances but whether a record exists in the database. This functionality uses the current status of people when the report is run.

4.1. Attendance review screen

To see the attendance review screen, click on attendance in the side menu, and then click on the review menu option.

You can choose from a variety of filters (located down the left hand side of the screen), to carry out very precise filtering of records, based on what activities have been attended over a period of time.

You should remember that the filtering that occurs will operate on the status of the individual at the time they attended the activity, not the status of the individual now. For example, you can undertake a search for individuals who were pregnant at the time of the activity although they may not be pregnant now.

Generally speaking, the more filters you apply the smaller your list of results will be. The list of filtered names appears on the right hand side of the screen.

At the top of the screen, there are options for you to choose what to do with the list of names (e.g. create a mailing list from them, create an excel spreadsheet to analyse the data based on many pieces of information contained within each person's record, or create an analysis report that has been programmed in to the database).

Here is a picture of how the Attendance Review screen might look:

ChildView
The Children's Centre Manager

User Name : **SysAdmin** Site : **Site 1**

HOME << **ATTENDANCE >> REVIEW**

Search

Attendance

Input

Review

Barcode Registers

Session Analysis

Individuals = 16 Families = 14

Filters: All Attendees only (no Duplicates) AND Between 02/04/2012 and 02/10/2012

☒ Attendees (No duplicates)
☐ Attendees (Show Duplicates)
☐ Family attendances
☐ No Attendance

Output Options:
☐ Correspondence mailing list for selection
☒ Detailed data extract
☐ Attendance

Refresh **Reset Filters**

OUTPUT **ANALYSE**

Search

TIME FRAME
 From To

SESSIONS / ACTIVITIES
☒ None ☐ Sessions ☐ Activity definitions

All sessions / activities ...

PERSONAL DETAILS
 Registered ☐ Yes ☒ No
 Local Indicator ☐ Yes ☒ No
 Mailshots ☐ Yes ☒ No
 Photo? ☐ Yes ☒ No
 Start date from To
 DOB from To
 Status
 Heading
 Category
 Gender

ADULTS
 Parent ☐ Yes ☒ No
 Teenage Parent ☐ Yes ☒ No (Teenage parents are U18)
 Lone Parent ☐ Yes ☒ No
 Pregnant ☐ Yes ☒ No
 Smoker ☐ Yes ☒ No
 Employment

CHILD
 Birth between
 Weight between
 Gestation between
 Childcare needs

LOCATED
 Areas: (NB: area selections will be ignored for No Attendance)
☐ My Areas ☐ Coles Estate
☐ Outside ☐ East Side
☐ All Areas ☐ North Side
☐ Old Dock
☐ Outside SureStart
Clear

REGISTERED SITE
 Site first registered at:
☐ Site 1
☐ Site 2
All Sites
Clear

PROFESSIONALS
 All Professionals **GO**
Clear

SERVICE PROVIDERS
☐ Blue Street Medical Practice
☐ CAB
☐ Central Surgery
☐ Children Centre
☐ Connexions
All Services
Clear

MESSAGE GROUPS
☐ Key Workers
All Groups
Clear

GROUPS
 Children
 Religion
 Language

Current List (Showing 16 records)

Identifier	Full Name	Surname	Age (Current)	Gender
BRJ0125	Miss Alison Brice	Brice	19	Female
CAR0020	Mr Jason Carter	Carter	11	Male
CAR0104	Ms Becky Carson	Carson	40	Female
CAR0105	Mr Sean Carson	Carson	18	Male
JOH0138	Ms Jean Johnson	Johnson	35	Female
JOH0139	J Johnson	Johnson	33	Male
JON0159	Ms Helen Jonson	Jonson	34	Female
MON0135	Mr Jason Monk	Monk	29	Male
S00358	Mr Homer Simpson	Simpson	52	Male
S00372	Harry Smith	Smith	8	Male
S00435	Harry Smith	Smith	13	Male
S00460	Harry Smith	Smith	11	Male
SAM0162	Miss Jade Samuels	Samuels	15	Female
SM0058	Mr Kavan Smith	Smith	13	Male
SM0188	Miss Rosie Smith	Smith	21	Female
W00353	Mr Alan Wilson	Wilson	45	Male

If you double-click on a name in the list, you will be taken to that person's Individual's Full Details screen.

As there are a large number of filters available you can use the scroll bar located on the right hand side of the screen to scroll through the various options.

The topic Filters & Options in the Attendance Review Screen looks at the filtering options in detail.

4.2. Filters and options in the attendance review screen

From the top of the screen, you can decide whether you want to see a list of names of people who attended activities irrespective of how many activities they attended (i.e. no 'duplicate' names will be shown in the list), a list of all attendances (with names duplicated for every activity they attend), a list of families who have attended (shown in address format) or a list of people who have not attended.

The screenshot shows the 'ChildView' interface for 'The Children's Centre Manager'. The user is 'SysAdmin' at 'Site 1'. The 'Attendance' section is active, showing 'Review' options. The main content area displays 'No Records 0 Families'. The 'FILTERS' section includes radio buttons for 'Attendees (No duplicates)', 'Attendees (Show Duplicates)', 'Family attendances', and 'No Attendance'. The 'Output Options' section includes radio buttons for 'Correspondence mailing list for selection', 'Detailed data extract', and 'Attendance'. The 'TIME FRAME' section shows dates from '17/06/2013' to '17/12/2013'. The 'PERSONAL DETAILS' section includes checkboxes for 'Registered', 'Local Indicator', 'Mailshots', and 'Photo?', and dropdowns for 'Start date', 'DOB from', 'Status', 'Heading', 'Category', and 'Gender'. The 'ADULTS' section includes checkboxes for 'Parent', 'Teenage Parent', and 'Teenage parents are U18'. The 'CURRENT LIST' section is empty, showing 'No data to display'.

You should also specify a time period over which attendance information is gathered and by default this is set to include the past 6 months.

Note: The list of people returned when using the 'No Attendance' option will only include those individuals who live in those areas assigned to the site you are logged in to.

4.2.1. Filters

There is a comprehensive set of filter options available to enable you to create a very precise query to ensure you only extract the people you need. The filters are located down the left-hand side of the screen.

Please note: the filter options are not multiple select lists i.e. ethnicity, employment, language. To report on multiple selections i.e. families where English is an additional language you will have to use either the advanced search (see section 9) or use a custom report (see section 7).

To use any one of the filters, simply select the criteria from the relevant drop down list, or check box to open the filter, then choose 'Yes' or 'No' for it.

The filters can be applied together so that if you select “Registered – Yes”, “Pregnant – Yes” and “Smoker – Yes”, then you will get a list of all registered people who are pregnant and who smoke.

4.2.2. Session / activity filters

The screenshot shows the ChildView software interface. The top bar displays 'ChildView The Children's Centre Manager' and 'User Name: SysAdmin Site: Site 1'. The left sidebar contains navigation links: HOME, Search, Attendance, Input, Review, Barcode Registers, and Session Analysis. The main content area is titled 'ATTENDANCE >> REVIEW' and shows 'No Records 0 Families'. It includes a 'Filters' section with options: 'Attendees (No duplicates)' (selected), 'Attendees (Show Duplicates)', 'Family attendances', and 'No Attendance'. There are also 'Output Options' for 'Correspondence mailing list for selection', 'Detailed data extract' (selected), and 'Attendance'. A 'Search' section allows filtering by 'TIME FRAME' (From 17/06/2013 To 17/12/2013) and 'SESSIONS / ACTIVITIES' (None, Sessions, Activity definitions). Below this is a 'PERSONAL DETAILS' section with checkboxes for Registered, Local Indicator, Mailshots, Photo?, Start date, and DOB. The bottom section is 'ADULTS' with checkboxes for Parent and Teenage Parent. The interface is titled 'ChildView The Children's Centre Manager' and shows 'User Name: SysAdmin Site: Site 1'.

This section allows you to define the type of session or activity that you wish to filter on. By default 'None' is selected which means you include every activity and session in your search results, and this includes any archived activities.

Sessions

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

Attendance >> REVIEW

Review

Individuals = 5 Families = 4

FILTERS: All Attendees only (no Duplicates) AND Sessions = Service Providers (Children Centre) Key Workers (Sally Evans) Activities (Food for Life) AND Between 02/04/2012 and 30/11/2012

☒ Attendees (No duplicates)
☐ Attendees (Show Duplicates)
☐ Family attendances
☐ No Attendance

Output Options:
☐ Correspondence mailing list for selection
☒ Detailed data extract
☐ Attendance

Buttons: Refresh, Reset Filters, OUTPUT, ANALYSE

Search

TIME FRAME
 From: 02/04/2012 To: 30/11/2012

SESSIONS / ACTIVITIES
☐ None ☒ Sessions ☐ Activity definitions

Session options ...

Locations	Summary	ECM
Targets	Aims	Activities
Service Providers	Key Workers	Session Name

Service Providers: Children Centre
 Key Workers: Sally Evans
 ECM Outcomes:
 Targets:
 Aims:
 Activities: Food for Life
 Locations:

PERSONAL DETAILS
 Registered ☐ Yes ☒ No

Current List (Showing 5 records)

Identifier	Full Name	Surname	Age (Current)	Gender
GEO0003	Mr Andy George	George	18	Male
JON0009	Miss Tracy Jones	Jones	13	Female
PAR0001	Ms Amanda Parrish	Parrish	46	Female
PAR0002	Mr Shaun Parrish	Parrish	24	Male
SMJ0057	Mr Chris Smith	Smith	43	Male

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This option allows you to specify multiple filtering criteria when searching on session attendances. The options presented will vary according to which session details you wish to filter on (i.e. Key Worker names, ECM outcomes etc). In the example above we are searching for 'Food for Life' sessions that had the Children Centre as the Service Provider and 'Sally Evans' as the key worker.

The 'Clear Session Options' button will remove any selection(s) made.

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME << ATTENDANCE >> REVIEW

Search

Attendance

Input

Review

Barcode Registers

Session Analysis

Individuals = 5 Families = 4

FILTERS: All Attendees only (no Duplicates) AND Sessions = Service Providers(Children Centre) Key Workers(Sally Evans) Activities(Food for Life) AND Between 02/04/2012 and 30/11/2012

☒ Attendees (No duplicates)
☐ Attendees (Show Duplicates)
☐ Family attendances
☐ No Attendance

Output Options:
☐ Correspondence mailing list for selection
☒ Detailed data extract
☐ Attendance

Refresh Reset Filters OUTPUT ANALYSE

Search

TIME FRAME
 From 02/04/2012 To 30/11/2012

SESSIONS / ACTIVITIES
☐ None ☒ Sessions ☐ Activity definitions

Session options ...

Locations Summary ECM

Targets Aims Activities

Service Providers Key Workers Session Name

Clear Session Options
 Select all attendances:
 Service Providers: Children Centre
 Key Workers: Sally Evans
 ECM Outcomes:
 Targets:

PERSONAL DETAILS
 Registered ☐ Yes ☒ No

Current List (Showing 5 records)

Identifier	Full Name	Surname	Age (Current)	Gender
GEO0003	Mr Andy George	George	18	Male
JON0009	Miss Tracy Jones	Jones	13	Female
PAR0001	Ms Amanda Parrish	Parrish	46	Female
PAR0002	Mr Shaun Parrish	Parrish	24	Male
SMJ0057	Mr Chris Smith	Smith	43	Male

Casework Reports Messaging System Admin

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Activity definitions

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME << ATTENDANCE >> REVIEW

Search

Attendance

Input

Review

Barcode Registers

Session Analysis

Individuals = 11 Families = 9

FILTERS: All Attendees only (no Duplicates) ECM = Children and Young People are Physically Healthy, Children and Young People are Mentally and Emotionally Healthy, Children and Young People are Sexually Healthy, Children and Young People live Healthy Lifestyles, Children and Young People choose not to take illegal drugs, Safe from maltreatment, neglect, violence and sexual exploitation, Safe from accidental injury and death, Safe from bullying and discrimination, Safe from crime and anti social behaviour, Children to have security, stability and cared for AND Between 02/04/2012 and 30/11/2012

☒ Attendees (No duplicates)
☐ Attendees (Show Duplicates)
☐ Family attendances
☐ No Attendance

Output Options:
☐ Correspondence mailing list for selection
☒ Detailed data extract
☐ Attendance

Refresh Reset Filters OUTPUT ANALYSE

Search

TIME FRAME
 From 02/04/2012 To 30/11/2012

SESSIONS / ACTIVITIES
☐ None ☐ Sessions ☒ Activity definitions

Activity definitions ...

☐ No criteria ☐ Activities ☐ Targets
☐ Locations ☐ Key Workers ☒ ECM
☐ Aims ☐ Service Providers

Be Healthy
 Stay Safe
 Enjoy and achieve
 Make a positive contribution

Current List (Showing 11 records)

Identifier	Full Name	Surname	Age (Current)	Gender
BRJ0125	Max Alison Brice	Brice	19	Female
CAR0020	Mr Jason Carter	Carter	11	Male
CAR0104	Ms Becky Carson	Carson	40	Female
CAR0105	Mr Sean Carson	Carson	18	Male
JOH0138	Ms Jean Johnson	Johnson	35	Female
JOH0139	J Johnson	Johnson	33	Male
JON0159	Ms Helen Jonson	Jonson	34	Female
MON0135	Mr Jason Monk	Monk	29	Male
S00358	Mr Homer Simpson	Simpson	52	Male
SAM0162	Ms Jade Samuels	Samuels	15	Female
W00353	Mr Alan Wilson	Wilson	45	Male

Casework Reports Messaging System Admin

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This option allows you to specify filtering criteria when searching on Activity definitions. The options presented will vary according to which activity definition you wish to filter on (i.e. Key Worker names, ECM outcomes etc). In our example we would be looking for all activities where the Every Child Matters criteria is Be Healthy or Stay Safe.

Using the search capability in sessions or activity definitions

When selecting either the Service Providers, Key Workers, Activities or Locations options you are presented with the ability to search on the selected category. If you know the name or part name of the entry you are looking for then you can enter this in the blank field and press the 'Go' button. Any matching entries will be shown in the list box underneath the 'Go' button. For example:

SESSIONS / ACTIVITIES

☐ None ☒ Sessions ☐ Activity definitions

Session options ...

Locations	Summary	ECM
Targets	Aims	Activities
Service Providers	Key Workers	Session Name

play

- ☐ Oakleigh Playgroup
- ☐ Playroom (Coppetts)
- ☐ Soft Play Room

Pressing the 'Go' button without specifying any text will return all entries in the selected category.

Archived activities

Archived activities can easily be identified in the activities list as they will have the suffix (A) after them. For example:

SESSIONS / ACTIVITIES

☐ None ☐ Sessions ☒ Activity definitions

Activity definitions ...

☐ No criteria ☒ Activities ☐ Targets

☐ Locations ☐ Key Workers ☐ ECM

☐ Aims ☐ Service Providers

- ☐ Health and Safety
- ☐ Information and advice (A)
- ☐ Male Carers Groups
- ☐ Maternity Services

4.2.3. Located Filter

The screenshot shows a web-based filter interface titled "LOCATED". Below the title, it says "Areas: (NB: area selections will be ignored for 'No Attendance')". On the left side, there are four buttons: "My Areas", "Outside", "All Areas", and "Clear". On the right side, there is a list of five area names, each preceded by an unchecked checkbox: "Barnfield - E01000125", "Barnfield - E01000126", "Barnfield - E01000127", "Barnfield - E01000128", and "Barnfield - E01000129". The list is contained within a scrollable box with up and down arrows on the right and a search bar at the bottom.

Every address set up on the database has an area (LSOA) allocated to it. You can then group the addresses together by their area using this filter block. The area options allow you to specify which groups of people you wish to include based upon the areas you have set up in relation to their addresses.

My Area - This will include all families that live in those areas that are assigned to the reach area of the Children's Centre you have logged in to. If you are logged into Management Console, all areas will be selected.

Outside – This will only include families living out of borough.

All areas – This will include all families regardless of what area they live in. So families from inside and outside the borough will be included.

Clear - removes all the ticks from the boxes.

Multi Select – You can combine areas however you please by clicking in the boxes next to the area names you'd like to include.

Note: when using the 'No Attendance' option any selections made in the located fields will be ignored and the returned results will only include individuals who live in the areas assigned to the site you are logged in to.

4.2.4. Refresh and reset filters button



Once you have specified the filtering criteria you need press the 'Refresh' button to get your list of names shown on the right hand side of the screen.

Every time you change a filter setting, you must click this button or press the Enter key on your keyboard to make the results list on the right-hand side of the screen change to reflect the effect of the newly-selected/de-selected filter(s).

The 'Reset Filters' button will remove any of the filtering criteria you may have selected.

4.3. How to use the results from the attendance review screen

Your filtered list will look similar to the following:

 The screenshot shows the 'ChildView' software interface. At the top, it says 'The Children's Centre Manager' and 'User Name: SysAdmin Site: Site 1'. The main menu on the left includes 'HOME', 'Search', 'Attendance', 'Input', 'Review', 'Barcode Registers', and 'Session Analysis'. The 'Review' section is active, showing 'Individuals = 21 Families = 17'. Below this are 'Refresh' and 'Reset Filters' buttons. The 'FILTERS' section includes radio buttons for 'Attendees (No duplicates)', 'Attendees (Show Duplicates)', 'Family attendances', and 'No Attendance'. The 'Output Options' section includes radio buttons for 'Correspondence mailing list for selection', 'Detailed data extract', and 'Attendance'. The 'OUTPUT' and 'ANALYSE' buttons are at the bottom right. The main area displays a 'Current List (Showing 21 records)' table with columns: Identifier, Full Name, Surname, Age (Current), and Gender. The table lists 21 records, including 'BR0125 Miss Alison Brice', 'CAR0020 Mr Jason Carter', 'CAR0104 Ms Becky Carson', 'CAR0105 Mr Sean Carson', 'GEO0003 Mr Andy George', 'JOH0138 Ms Jean Johnson', 'JOH0139 J Johnson', 'JON0009 Miss Tracy Jones', 'JON0159 Ms Helen Jonson', 'MON0135 Mr Jason Monk', 'PAR0001 Ms Amanda Parrish', 'PAR0002 Mr Shaun Parrish', 'S00358 Mr Homer Simpson', 'S00372 Harry Smith', 'S00435 Harry Smith', 'S00460 Harry Smith', 'SAM0162 Miss Jade Samuels', and 'SMI0057 Mr Chris Smith'. The bottom of the screen shows copyright information: '© Copyright 2012 GAGI All rights reserved' and 'v3.2.1 - The Children's Centre Manager'.

At the top of the screen, there is a panel that gives you a combination of numerical totals that changes depending on the attendee type options selected. The selected filters are also detailed in this area.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME | **ATTENDANCE >> REVIEW**

Search | **Review**

Attendance

Input | Review | Barcode Registers | Session Analysis

Individuals = 11 Families = 9

FILTERS: All Attendees only (no Duplicates) AND Activities = Bumps & Babies AND ECM = Children and Young People are Physically Healthy, Children and Young People are Mentally and Emotionally Healthy, Children and Young People are Sexually Healthy, Children and Young People live Healthy Lifestyles, Children and Young People choose not to take illegal drugs, Safe from maltreatment, neglect, violence and sexual exploitation, Safe from accidental injury and death, Safe from bullying and discrimination, Safe from crime and anti social behaviour, Children to have security, stability and cared for AND Between 02/04/2012 and 30/11/2012

Output Options:
☐ Correspondence mailing list for selection
☒ Detailed data extract
☐ Attendance

☒ Attendees (No duplicates)
☐ Attendees (Show Duplicates)
☐ Family attendances
☐ No Attendance

Refresh | Reset Filters | OUTPUT | ANALYSE

Search

TIME FRAME
 From: 02/04/2012 To: 30/11/2012

SESSIONS / ACTIVITIES
☐ None ☐ Sessions ☒ Activity definitions

Activity definitions ...
☐ No criteria ☒ Activities ☐ Targets
☐ Locations ☐ Key Workers ☐ ECM
☐ Aims ☐ Service Providers

GO

☐ Aerobics Classes
☒ Bumps & Babies
☐ Childminding Network
☐ Cookery (A)

Current List (Showing 11 records)

Identifier	Full Name	Surname	Age (Current)	Gender
BRJ0125	Miss Alison Brice	Brice	19	Female
CAR0020	Mr Jason Carter	Carter	11	Male
CAR0104	Ms Becky Carson	Carson	40	Female
CAR0105	Mr Sean Carson	Carson	18	Male
JOH0138	Ms Jean Johnson	Johnson	35	Female
JOH0139	J Johnson	Johnson	33	Male
JOH0159	Ms Helen Jonson	Jonson	34	Female
MON0135	Mr Jason Monk	Monk	29	Male
S00358	Mr Homer Simpson	Simpson	52	Male
SAM0162	Miss Jade Samuels	Samuels	15	Female
W00353	Mr Alan Wilson	Wilson	45	Male

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Each column has a column header (e.g. a Label name, like 'Identifier', Name, etc.), and each row is one person's record.

At the top right of the screen, there are choices about how to extract or analyse the data. This is discussed in the section 4.4: Outputting and analysing the attendance review results.

Column widths

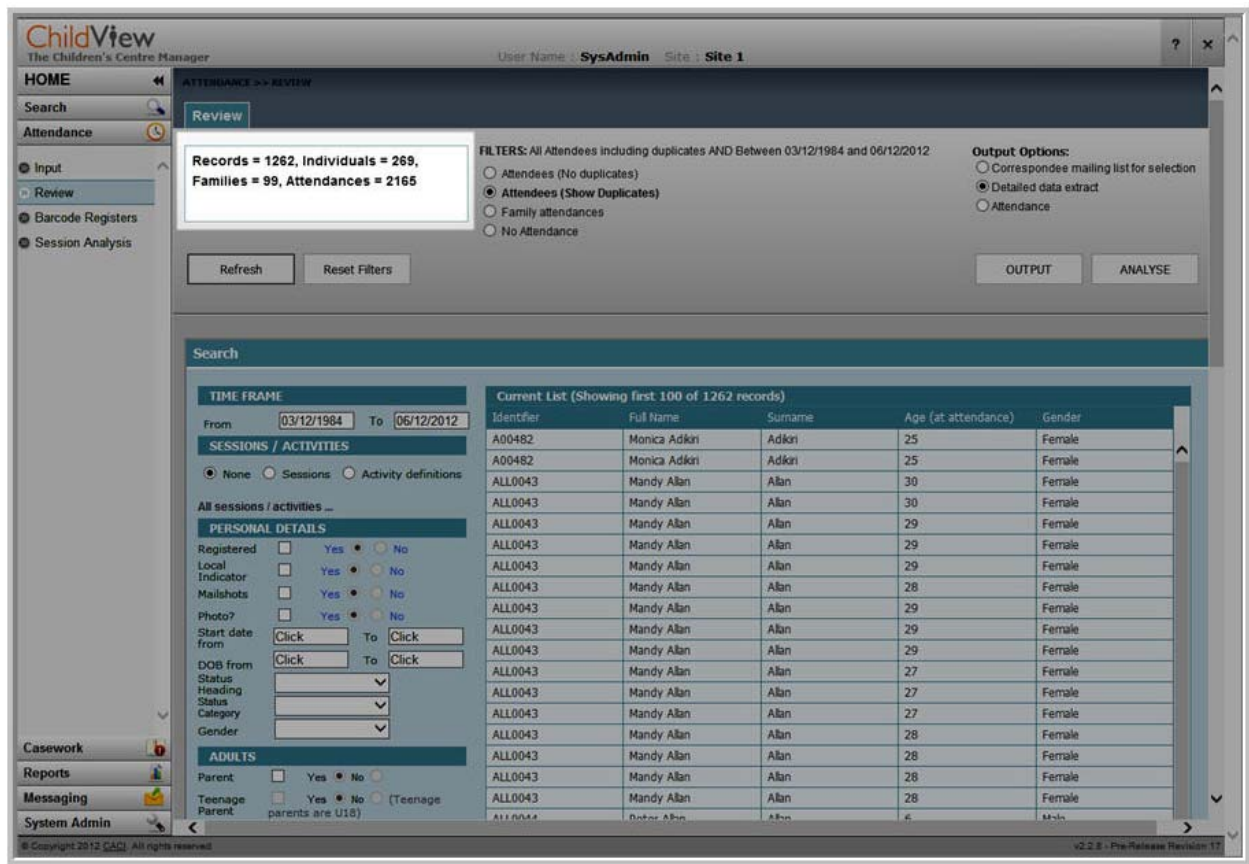
If you click and hold the mouse pointer over the line that divides two column headers, you will be able to drag the mouse to re-size the column width.

Column header sorting

If you click on any of the Column Header buttons, you will sort the list into order based on the information in that column. If you keep clicking the same button, it will sort the data alternately in A-to-Z, then Z-to-A order.

Total panel

The numerical totals shown here will vary according to the attendee type option selected from the top of the screen. You get most totals if you have used 'Attendees (Show duplicates)'. An example of those results is:



In this panel:

Records = the number of activities / sessions that were attended.

Individuals = the number of individuals (persons) who attended across those activities / sessions.

Families = the number of 'households' where those individuals live (i.e. the number of different addresses they live at)

Attendances = the total number of visits those individuals made to the activities / sessions (i.e. to the 'Records' above).

In some instances it is possible that you may see different family counts depending upon which of the attendance type options are chosen:

Attendees (No Duplicates)

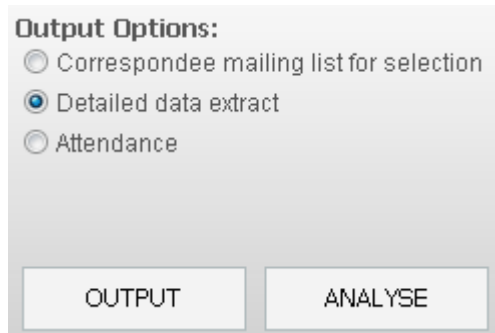
The family count when using this option is based on the current address of the person as specified in their Individual Full Details.

Attendees (Show Duplicates) & Family Attendances

The family count when using either of these options is based on the address(es) the person was living at when the attendance took place. As such is it feasible that a person could have moved with the specified time frame being used and their multiple addresses will be counted in this figure.

4.4. Outputting and analysing the attendance review

The output options panel, at the top right of the screen, lets you decide how to use the results from your filtered lists:



Output Options:

☐ Correspondee mailing list for selection

☒ Detailed data extract

☐ Attendance

OUTPUT **ANALYSE**

You can export information linked to the records contained within your search results in a format that can be read by Microsoft Excel (.csv), or export in XML format. Alternatively, you can create certain reports by using the Analyse button.

4.4.1. Output button

Click on one of the output options, then click the output button.

The output options are:

1. Corresponding mailing list for the selection:

Use this option to create a list of all the nominated Correspondees that are associated with the people on your list. If your list contains several children from the same family then the Correspondee for that family will only be listed once (assuming only one Correspondee status has been set. If multiple statuses have been set then each of these will be listed). Thus, you will see that the list of names making up the Correspondee list will not be the same as the list shown in the search result section. This list of Correspondee names and addresses can be sent to Excel and used as a mail merge data source for your letters or labels. The extract produced by the Correspondee mailing list for the selection option only includes contact details.

2. Detailed data extract

The extract produced by the Detailed data extract option includes most tick-boxes and data fields from a person's record. The names on the data list extracted will match those in your filtered list. The following provides an indication as to some of the column headings:

UPN - Unique Pupil Number.

PND ID - Post Natal depression. If this is set to one then that means that the PND check box is ticked in the individual's full details.

UTR - Unique Tax Reference number.

S - This informs you if the individual is a parent (P), a child (C) or pregnant (*).

No Plaster - If this is set to one then that means that the No Plaster check box is ticked in the individual's full details.

Status - This will be set to 1 if the individual is classed as active.

3. Attendances

This extract will show only the attendance information attached to the names of the people in your filtered list. Any columns with the prefix AT refers to data captured at 'Attendance Time'.

For reference the 'AT Parent' column in the extract refers to status of the parent flag(s) when that individual attended the activity. The 'AT Parent' indicators are:

0 = not a parent

1 = is a parent

2 = is a lone parent.

Once the OUTPUT button has been clicked, you are presented with the Data Pre-Extract Screen. Here you can modify the columns that are presented (select the Field Chooser) or export the information in a format that can be read by Microsoft Excel (.csv) or as an XML file by clicking the appropriate button.

For more information about this screen please refer to section 6: Data pre-extract screen.

Security note - if you export data from the database, you must ensure that the destination it is saved in is a secure area in your computer system. This is because that exported data will no longer be protected by the password and user name security measures that are built in to the database.

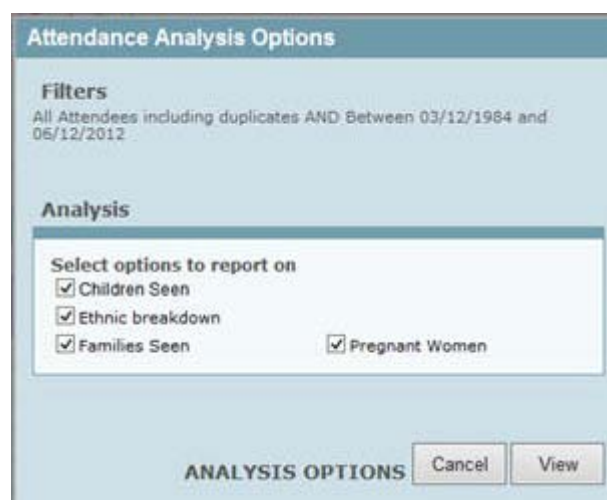
4.4.2. Analyse button

This lets you create an 'Analysis by Individuals Seen' report or an 'Analysis by cost effectiveness' report.

Analysis by Individuals Seen

If you choose this option, you will be able to generate a report that is very similar to the Monthly Monitoring report (the M3) that SureStart sites were required to submit. In this version, however, you can include the records you would like; by correctly filtering the records beforehand via the Attendance Review screen; instead of using the pattern of attendances that was prescribed by the SureStart Unit for the M3.

After you have filtered your list as required, click on the 'ANALYSE' button. You will see a screen like this:



The image shows a software dialog box titled "Attendance Analysis Options". It has a light blue header and a white body. Under the "Filters" section, it says "All Attendees including duplicates AND Between 03/12/1984 and 06/12/2012". The "Analysis" section contains a box titled "Select options to report on" with four checked checkboxes: "Children Seen", "Ethnic breakdown", "Families Seen", and "Pregnant Women". At the bottom, there is a label "ANALYSIS OPTIONS" and two buttons: "Cancel" and "View".

You can choose which summary categories will be included in your report by ticking or de-selecting the boxes next to:

- Children Seen
- Ethnic Breakdown
- Families Seen
- Pregnant Women

After you have made your choices, click the 'View' button (the right hand button in the image above). You will see a report similar to this:

Report

Page 1 of 2 Pdf

Analysis Report

Attendances In Range
From 03 Dec 1984 To 06 Dec 2012

Pregnant Women

	Pregnant Women Seen	Teenage Women Seen	Lone Women Seen	Pregnant women with a disability or special need
Existing	0	0	0	0
New	26	2	8	2
Total	26	2	8	2

Ethnic Breakdown (of children seen)

	Existing Parents	New Parents		Existing Parents	New Parents		Existing Parents	New Parents
White			Mixed			Asian		
British	0	11	White/Black	0	1	Indian	0	1

The report can be saved in several different formats - click on the drop down arrow to see those available. Once you have made your selection press the 'OK' button and follow any on screen prompts that may be provided.

Close the report pop up window to return to the Attendance Review screen.

5. Mail Merge / Data Extract

The Mail Merge / Data Extract screen allows you to create very detailed queries that can then be used for data analysis, reporting or mailing lists. It is useful to report on registration numbers.

Click on Search in the side menu, and then click on Mail Merge / Data Extract to access this functionality.

The Mail Merge and Data Extract screen may look something like the following once you have completed a search:

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

HOME

SEARCH >> MAIL MERGE DATA EXTRACT

Search

Mail Merge and Data Extract

Records = 308 Families = 97

Retain filter option between selections ☐

☒ Un-archived families only
☐ Un-archived & archived families
☐ Archived families only

OUTPUT options
☒ Correspondes mailing list for the selection
☐ Detailed data extract
☐ Attendances only
 From date [09/10/2013]

New List Add To List Delete List

OUTPUT

Output

PERSONAL DETAILS

Registered ☐ Yes ☒ No
 Local Indicator ☐ Yes ☒ No
 Mailshots ☐ Yes ☒ No
 Photo? ☐ Yes ☒ No
 Start Date From Click To Click
 DOB From Click To Click
 Status Heading
 Status Category
 Gender

ADULTS

Parent ☐ Yes ☒ No
 Teenage Parent ☐ Yes ☒ No
 Please note that Teenage parents are U18s.
 Lone Parent ☐ Yes ☒ No
 Pregnant ☐ Yes ☒ No
 Smoker ☐ Yes ☒ No
 Employment

CHILD

Birth weight between and (Kgs)
 Gestation between and (Wks)
 Childcare needs

FILTER

Unarchived

Current List (Showing first 100 of 308 records)

Double click a row to go to individual's Full Details

Identifier	Full Name	Age	Full Address	Postcode	Araname
PAR0001	Ms Amanda Parrish	46	29, Barnside Field, Eastbourne	BC3 6DF	East Side
PAR0002	Mr Shaun Parrish	24	12, King Square, Eastbourne	BN25 2LL	West Side
GEO0003	Mr Andy George	18	29, Barnside Field, Eastbourne	BC3 6DF	East Side
GEO0004	Mr Alan George	17	29, Barnside Field, Eastbourne	BC3 6DF	East Side
GEO0005	Mr Colin George	10	29, Barnside Field, Eastbourne	BC3 6DF	East Side
FRA0006	Ms Ann-Marie Frank	39	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
JON0007	Mr Shaun Jones	37	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
JON0008	Miss Ally Jones	16	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
JON0009	Miss Tracy Jones	13	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0015	Mrs Karen Carter	50	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0016	Mr Bob Carter	64	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0017	Mr Joe Carter	20	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0018	Mr Jack Carter	19	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0019	Miss Vicky Carter	17	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0020	Mr Jason Carter	11	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
CAR0021	Miss Amanda Carter	13	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart
ELL0026	Ms Linda Ellis	38	36, Barnside Field, Eastbourne	BC3 6DF	East Side
ELL0027	Miss Sam Ellis	14	36, Barnside Field, Eastbourne	BC3 6DF	East Side
ELL0028	Ms Sara Ellis	13	36, Barnside Field, Eastbourne	BC3 6DF	East Side
WIL0029	Mr John Wilde	15	9, Barnside Field, Eastbourne	BC3 6DF	East Side
WIL0030	Mrs Shaun Wilde	38	6, Hollow Park, Eastbourne	BN8 6DF	Outside SureStart
WIL0031	Mr Sally Wilde	42	6, Hollow Park, Eastbourne	BN8 6DF	Outside SureStart
WIL0032	Mr Joshua Wilde	18	6, Hollow Park, Eastbourne	BN8 6DF	Outside SureStart
WIL0033	Miss Alice Wilde	14	6, Hollow Park, Eastbourne	BN8 6DF	Outside SureStart

You can choose from a variety of filters (located down the left hand side of the screen), to carry out very precise filtering of records, generally based on the information held within each person's record. Generally, the more filters you apply, the smaller your list of results will be. The list of filtered names appears on the right hand side of the screen.

As there are a large number of filters available a scroll bar is provided so that you can view them all.

At the top of the screen, there are options for you to choose what to do with the list of names i.e. create a mailing list from them, create an excel spreadsheet to analyse the data, or create a report detailing attendance information of the people in your list.

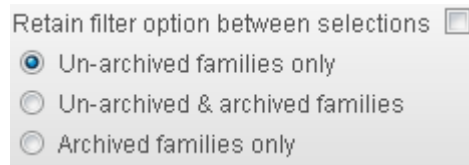
The screen is fairly similar to the Attendance Review screen that is discussed section 4. There are, however, some significant differences, and these are covered section 5.1: Filters and Options in the Mail Merge & Data Extract Screen.

Note: The most important difference between this and the Attendance Review screen is that the results generated from this screen are not based around attendance at activities or sessions. They are just based around whether a record exists in the database or not. As such the filters operate on the current status of individuals when the list was created.

If you double-click on a name in the list, that person's Individuals Full Details box will be shown.

5.1. Filters and options in the mail merge and data extract screen

Archived or un-archived search and retain search filter



Retain filter option between selections ☐

☒ Un-archived families only

☐ Un-archived & archived families

☐ Archived families only

At the top of the screen there are selection items that let you choose whether to search for un-archived (active) families, both un-archived and archived families, or only archived families for your data extract/mail list. The default setting is un-archived families only. Select the option you need.

At the top of the screen, there is a check box called Retain filter option between selections.

This is a very important check box, because it affects the way the filters work.

If the box is not ticked, then each time a list is generated from the filters you have chosen, all the filters will re-set to their default values as soon as the list has been generated. In most cases, that means they are disregarded.

If the box is ticked, then the filters you have chosen will stay in place, regardless of whether you generate a new or amended list of records.

Filter options

There is a comprehensive set of filter options available to enable you to create a very precise query to ensure you only extract the people you need. The filters are located down the left-hand side of the screen.

The filters can be applied together so that if you select “Registered – Yes”, “Pregnant – Yes” and “Smoker – Yes”, then you will get a list of all registered people who are pregnant and who smoke.

Please note: when using the mail merge / data extract for looking at registration number you must always select “Registered – Yes”.

The result of your selection is not shown until you click on the 'New List' button, at the top of the filter column. When you do, your query will be created and run and you will see a list of the people that match your filters.

If you do not choose to retain your filters (see above), you can create a cumulative effect with the filters very easily. If you create a new list with only the ‘Smoker - Yes’ criteria selected, and then choose ‘Pregnant - Yes’ and click on the 'Add To List' button, at the bottom of the filter column, your results will show anyone who is a smoker plus anyone who is pregnant.

You can then add more to the list if you require, using the same method.

Located filter

Every address set up on the database has an area (LSOA) allocated to it. You can then group the addresses together by their area using this filter block. The area options allow you to specify which groups of people you wish to include based upon the areas you have set up in relation to their addresses.

My Area - This will include all families that live in those areas that are assigned to the reach area of the Children's Centre you have logged in to. If you are logged into Management Console, all areas will be selected.

Outside – This will only include families living out of borough.

All areas – This will include all families regardless of what area they live in. So families from inside and outside the borough will be included.

Clear - removes all the ticks from the boxes.

Multi Select – You can combine areas however you please by clicking in the boxes next to the area names you'd like to include.

5.2. Generating a list of results

Lists are created using the buttons at the bottom of the filtering column. Your list of results shows on the right-hand side of the screen.

New list button

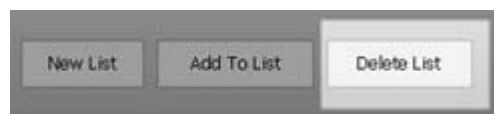
When you have made your selection you can click on the 'New List' button to create your query. This will create a new list using the filters you have selected. You should use this for the first set of filters you run or if you want to create a new list rather than add to an existing one. When you click on this button the database will run the query you have created and display the results in the panel on the right hand side.

Add to list button



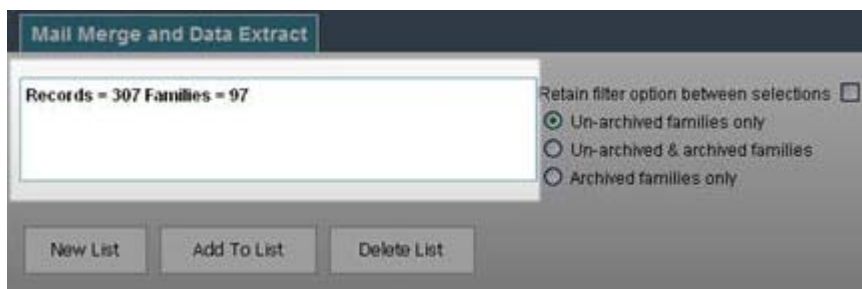
If you have already run one set of filters, then you have the option to add some more people to your list using a different set of filters. In this instance, you should make sure the 'Retain filters...' check box is un-ticked before you start. Click the 'New List' button to create your list from the first set of filters you choose. Then, you should select your new filters and click on the 'Add to List' button. The new query will run and new people (if there are any) will be added to your list. The system will prevent the same people being added twice even if they might fit each of your different sets of filters.

Delete List Button



If you want to start again, click this button to clear the lists.

Returned record count



Above the three buttons, there is a number count relating to the list of results you have just created. Records is the number of people on the list, and Families is the number of family units (Addresses) that those names are Grouped in to.

Section 5.3: How to use the results from the mail merge / data extract screen details how to use the list once created.

5.3. How to use the results from the mail merge / data extract screen

Your filtered list will look something similar to the following:

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

MAIN MENU

- Search
- Family
- People
- Add Family Wizard
- Advanced Search
- Service Providers
- Mail Merge Data Extract

Mail Merge and Data Extract

Records = 6 Families = 2

Retain filter option between selections ☐

- ☒ Un-archived families only
- ☐ Un-archived & archived families
- ☐ Archived families only

OUTPUT options

- ☒ Correspondence mailing list for the selection
- ☐ Detailed data extract
- ☐ Attendances only

From date 05/06/2012

New List Add To List Delete List

Output

PERSONAL DETAILS

Registered ☐ Yes ☐ No

Local Indicator ☐ Yes ☐ No

Mailshots ☐ Yes ☐ No

Photo? ☐ Yes ☐ No

Start Date From Click To Click

DOB From Click To Click

Status Heading

Status Category

Gender

ADULTS

Parent ☐ Yes ☐ No

FILTER

Unarchived AND in these areas: Old Dock

Current list (Showing 6 records)

Double click a row to go to Individual's Full Details

Identifier	Full Name	Age	Full Address	Postcode	Areaname
S00052	Spetty Spock	9	10, Saxon Road, Eastbourne	BN12 8QT	Old Dock
B000552	Dr. Lizy Bruce	15	Saxon Road, Eastbourne	BN12 8QT	Old Dock
S00485	Dr. Cornelius Spock	62	10, Saxon Road, Eastbourne	BN12 8QT	Old Dock
B000553	Master Greg Bruce	2	15, Saxon Road, Eastbourne	BN12 8QT	Old Dock
B000554	Ms Claire Bruce	7	15, Saxon Road, Eastbourne	BN12 8QT	Old Dock
B000555	Ms Wilma Bruce	4	15, Saxon Road, Eastbourne	BN12 8QT	Old Dock

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A panel at the top left-hand side gives a number count of people (records) and how many addresses (families) were returned according to your search criteria. Also at the top right of the screen there are choices about how to extract the data. This is discussed in section 5.4: The Output Button – Mail Merge or Data Extract.

A panel at the top of the results grid shows you which filters have been applied to arrive at this result.

Each column has a column header (e.g. a Label name, like 'Identifier', 'Area', etc.), and each row is one person's record.

Column header sorting

If you click on any of the Column Header buttons, you will sort the list into order based on the information in that column. If you keep clicking the same button, it will sort the data alternately in A-to-Z, then Z-to-A order.

5.4. The Output Button – Mail Merge or Data Extract

Mailing lists or data extract

An important feature in the Children's Centre Manager database is the Correspondent status box, which is shown in the information presented when you select the Personal menu option in the Individual Full Details screen. The presence, or not, of a tick in this box determines whether a record is included in a Mailing List Extract.

The Correspondent field is used by all the Mail options within the database to indicate which member of each household you would want to write to. You can use the Correspondent Check option in the 'System Admin' menu to help find any families without a Correspondent or those where more than one has been set, either intentionally or by mistake.

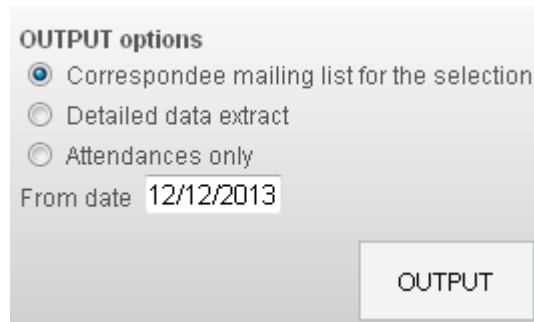
Note: The Correspondent box is ignored when a Detailed Data Extract is done, rather than a Mailing List.

The output button

The output options panel, at the top of the screen, lets you decide how to use the results from your filtered lists.

You can export information linked to the records contained within your search results in a format that can be read by Microsoft Excel (.csv), or export in XML format.

Click on one of the output options, then click the output button (this is the button located to the right hand side of the output options).



OUTPUT options

☒ Correspondent mailing list for the selection

☐ Detailed data extract

☐ Attendances only

From date 12/12/2013

OUTPUT

The output options are:

1. Correspondent mailing list for the selection

Use this option to create a list of all the nominated correspondents that are associated with the people on your list. If your list contains several children from the same family then the correspondent for that family will only be listed once (assuming only one correspondent status has been set. If multiple statuses have been set then each of these will be listed). Thus, you will see that the list of names making up the correspondent list will not be the same as the list shown in the search result section. This list of correspondent names and addresses can be sent to Excel and used as a mail merge data source for your letters or

labels. The extract produced by the correspondee mailing list for the selection option only includes contact details.

2. Detailed data extract

The extract produced by the detailed data extract option includes most tick-boxes and data fields from a person's record. The names on the data list extracted will match those in your filtered list.

3. Attendances only

Choose a date from the drop down calendar, to be the starting point from when attendances are checked. This list will show only the attendance information attached to the names of the people in your filtered list – as such it is possible that the flags on an individual may be different at the time of attendance compared with when the list was created. For example the 'AT Parent' column in the resulting attendance list refers to status of the parent flag(s) when that individual attended the activity – not the status of the parent flag(s) when the data extract was undertaken. The 'AT Parent' indicators are

0 = not a parent.

1 = is a parent.

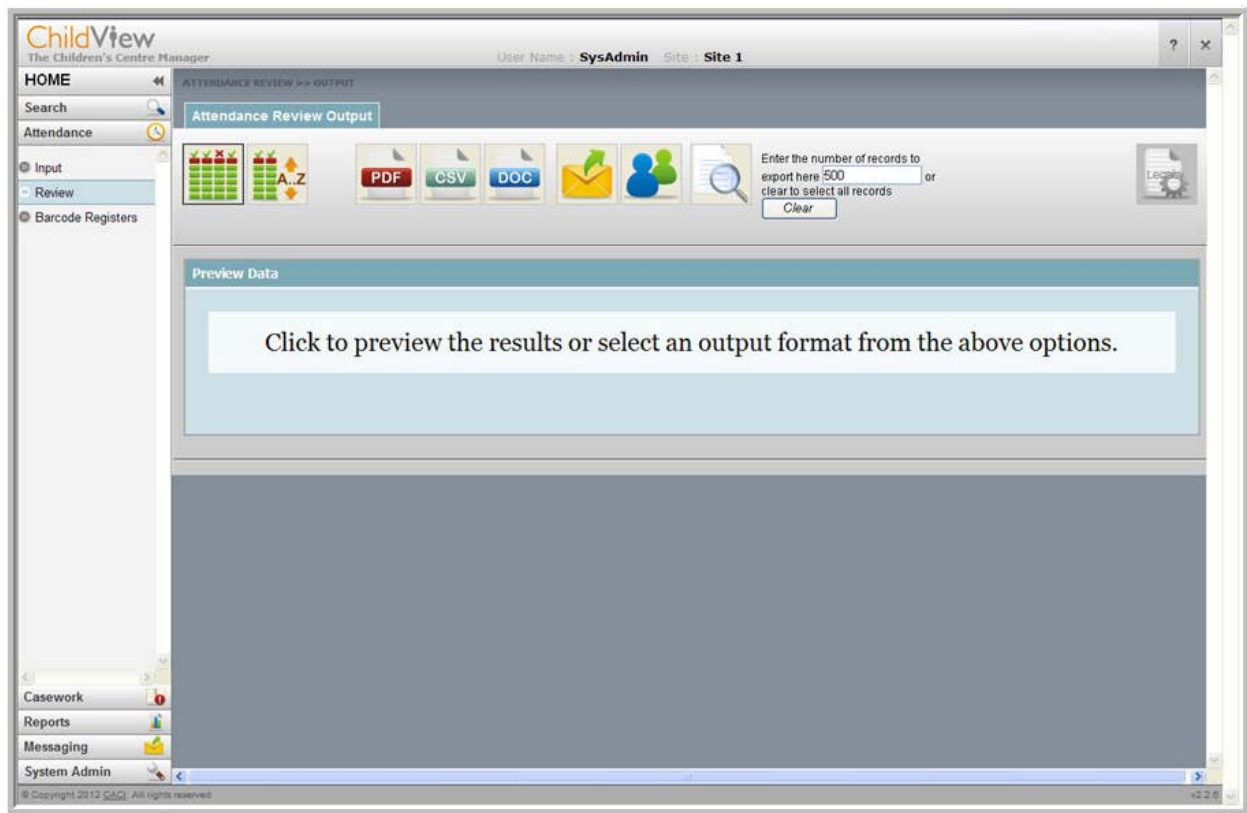
2 = is a lone parent.

Once the output button has been clicked, you presented with the Data Pre-Extract Screen. Here you can modify the columns that are presented (select the Field Chooser) or export the information in a format that can be read by Microsoft Excel (.csv) or as an XML file by clicking the appropriate button.

For more information about this screen please refer to section 6: Data pre-extract screen.

6. Data pre-extract screen

After you click the output button in the Attendance Review or the Mail Merge / Data Extract you will be presented with a Data Pre-Extract screen.



The options available are:



- Field chooser

The field chooser will have a number of fields pre-selected depending on the Output Option chosen (Correspondee Mailing List, Detailed Data Extract or Attendances). This initial selection is aimed at creating a manageable data set that will not use excessive system resources. The selection can be changed by ticking or un-ticking the fields listed.

The following example shows some of the fields selected for a Detailed Data Extract:



- Sort order

The order in which the records are output can be determined by clicking the 'Sort Order' button and ticking the fields in the required order. The fields listed are dependent on the Output Option chosen (Correspondee Mailing List, Detailed Data Extract or Attendances). The following example shows the sort order available for an Attendance extract.



- Export to PDF

The selected fields will be exported in PDF format in the selected order.



- Export to CSV

The selected fields will be exported in CSV format in the selected order.



- Export to RTF or DOC

The selected fields will be exported in RTF or DOC format in the selected order.



- Preview the data

Enter the number of records to export here or
clear to select all records

- select the number of records to preview

or click the 'Clear' button to preview all.

The number of records indicated in the box to the right of the 'Preview' icon will be displayed in a grid, reflecting the selected fields and sort order (see example below).

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME

Search

Attendance

Input

Review

Barcode Registers

Attendance Review Output

PDF CSV DOC

Enter the number of records to export here 500 or clear to select all records

Clear

Preview Data

ID	Title	Forename	Surname	Identifier	DOB	Postcode	HouseNumber	HouseName	StreetName	Address2	TownName
1		Alan	Wilson	F00434	12/08/1968 00:00:00	BN5 6TF	65		Ash Park		Eastbourne
2		Amanda	Lancer	LAN0175	30/10/1999 00:00:00	BN17 5TH	44		Sycamore Park		Eastbourne
3		Ben	Wilson	W00471	01/03/2005 00:00:00	BN5 6TF	6		Ash Park		Eastbourne
4		Harry	Smith	S00372	03/03/2005 00:00:00	BN9 9YY	10		Parfield Close		Eastbourne
5		Harry	Smith	S00435	02/04/2000 00:00:00	BC3 6DF	23		Barnside Field		Eastbourne
6		Harry	Smith	S00460	12/05/2002 00:00:00	BN5 6TF	47		Ash Park		Eastbourne
7		J	Johnson	JOH0139	01/11/1980 00:00:00	BN8 9BP	11		North Park		Eastbourne
8		Nathan	Blake	B000491	02/05/2006 00:00:00	BC3 6DF	15		Anyroad		Eastbourne
9		William	Blake	B000492	01/05/2006 00:00:00	BC3 6DF	15		Anyroad		Eastbourne
10	Master	Henry	Martin	M000512	27/04/2010 00:00:00	BN9 9YY	5		Parfield Close		Eastbourne
11	Master	Peter	Price	P000543	11/11/2007 00:00:00	BN12 3CV	105		Mallard Road		Eastbourne

Casework

Reports

Messaging

System Admin

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v2.2.6

7. Session Analysis

Session Analysis functionality allows a user with the appropriate permission to select sessions, view a summary break down then drill down to more detailed data as required.

Search filters are provided to enable the user to define the scope of the analysis and the data returned is then broken down into a number of different areas, as per the following sections.

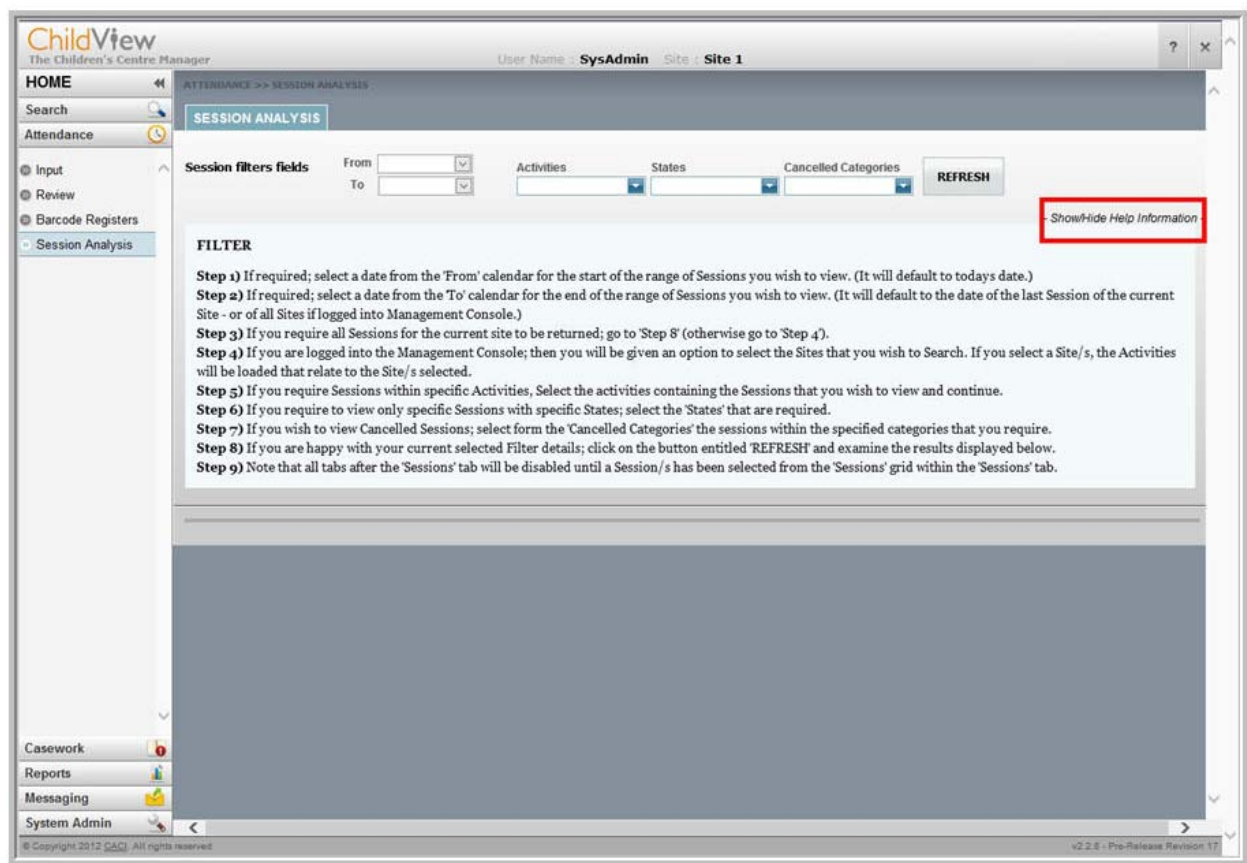
7.1. Filters

From the Side Menu, click the Attendance button, then click the Session Analysis option. You will see a screen similar to this:

The screenshot displays the 'ChildView' application interface for 'The Children's Centre Manager'. The user is logged in as 'User' at 'Site 1'. The left sidebar shows the 'Attendance' menu expanded, with 'Session Analysis' selected. The main content area is titled 'SESSION ANALYSIS' and contains a 'Session filters fields' section. This section includes two date pickers for 'From' (18 Dec 2013) and 'To' (31 Dec 2013), and three checkboxes for 'Activities', 'States', and 'Cancelled Categories'. A '+ Activities' button is next to the 'Activities' checkbox, and a 'REFRESH' button is to the right. A link for 'Show/Hide Help Information' is located at the bottom right of the filter section. The footer of the application shows '© Copyright 2012 G&G All rights reserved' and 'v2.2.9 - Pre-Release Revision 20'.

Select the Date Range and choose the Activities, Session States and Cancelled Categories that the Session Analysis should include. Tick the '+ Activities' button if you want to see a breakdown of Activities as well as the summary information. With the exception of the Date Range, all filters can be left blank.

Click 'Show/Hide Help Information' to display further details relating to the use of filters, as illustrated on the next page.



When accessing Session Analysis from Management Console, there is an additional Site filter. Once the required filters have been selected click refresh to display the Summary screen.

7.2. Summary

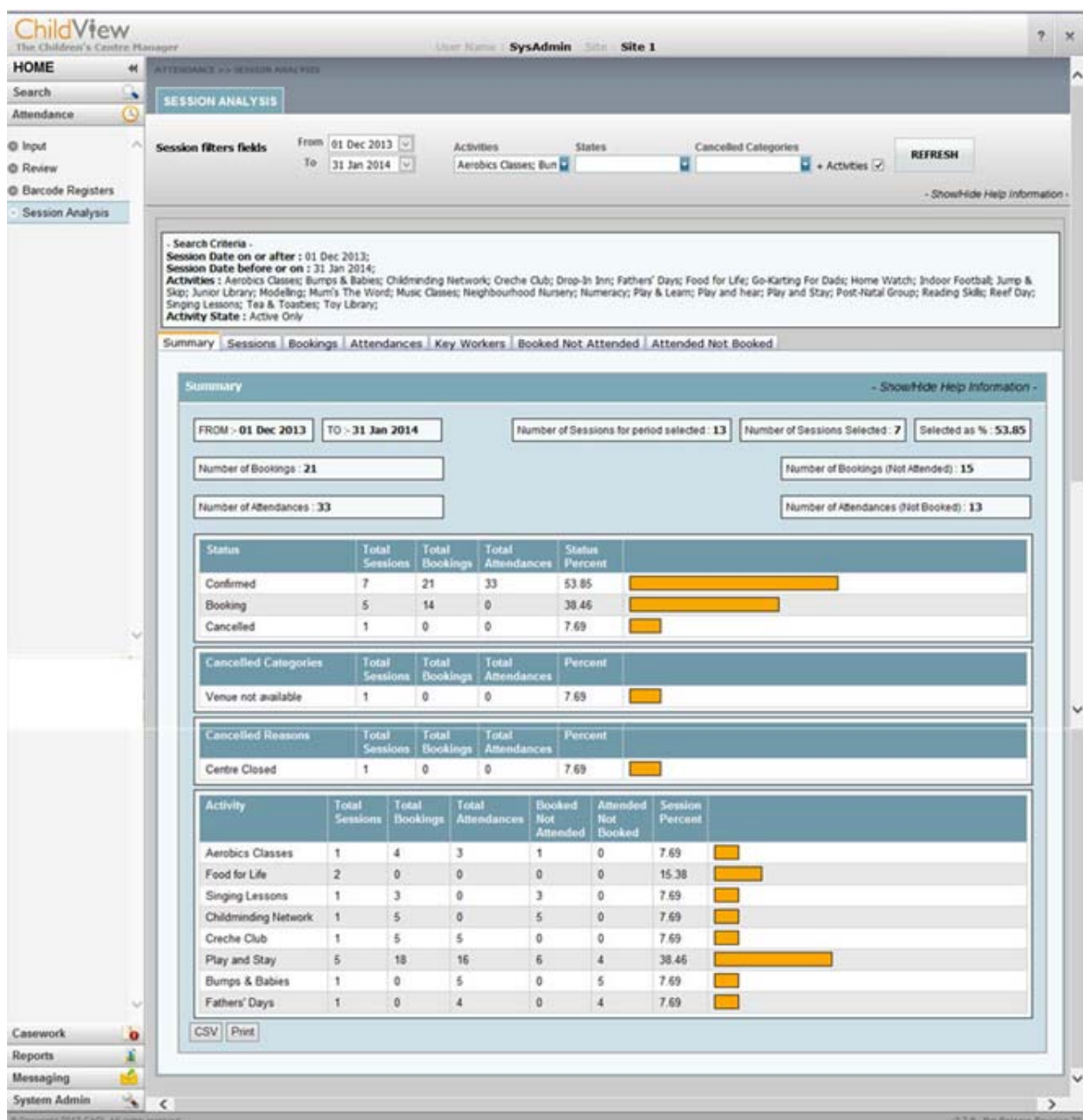
The Summary tab provides an analysis of all the sessions that fall within the selected date range and match the selected filters. It shows the following information:

- The total number of **ALL** sessions that fall within the selected date range.
- The number of sessions that match the other filter options and the percentage that this represents of the total number.
- The number of bookings for the sessions that match the selected filters.
- The number of attendances for the sessions that match the selected filters.
- The number of bookings without an attendance for the sessions that match the selected filters.
- The number of attendances without a booking for the sessions that match the selected filters.

This summary data is then broken down by:

- Session Status
- Cancelled Categories
- Cancelled Reasons
- Activity (If '+ Activities' ticked)

An example of the Summary Tab is shown below.



The percentages shown are all calculated against the number of sessions selected (not the total number within the date range), and represented graphically by the yellow bars.

The Summary can be either saved as a .CSV file or printed directly.

Clicking 'Show/Hide Help Information' will display further details about the Filters or the Summary Tab.

7.3. Sessions

The Sessions Tab lists all the sessions that match the selected filters.

The Select tick box at the left of each row is used to activate the other tabs for the selected session(s). These tabs will not display any information until one or more sessions are ticked.

Clicking on a row will activate the Session Edit/Attendance Input/Session Cancel buttons at the bottom of the screen. When a row is clicked, it will be shown in blue.

If a cancelled session is selected the Session Cancel button will become Session Activate and the Session Edit button will not be available.

The Attendance Input button links to the Attendance Input session select screen.

An example of the Sessions Tab is shown below:

The screenshot shows the 'ChildView' application interface. The top navigation bar includes 'HOME', 'Search', and 'Attendance'. The left sidebar lists 'Input', 'Review', 'Barcode Registers', and 'Session Analysis'. The main content area is titled 'SESSION ANALYSIS' and displays 'Session filters fields' with a date range from '01 Dec 2013' to '31 Jan 2014', 'Activities' set to 'Food for Life; Play and Stay', and 'States' set to 'Active Only'. A 'REFRESH' button is present. Below the filters, a 'Search Criteria' box shows the same parameters. The 'Sessions' tab is active, displaying a table of sessions. The table has columns: 'Select', 'Session', 'Date', 'Start', 'Stop', 'Location', 'Bookings', and 'Attended'. The table lists several sessions, including 'Play and Stay (Community Centre)' and 'Food for Life (Clients Home)'. At the bottom of the table, there are buttons for 'Session Edit', 'Attendance Input', and 'Session Cancel'.

Select	Session	Date	Start	Stop	Location	Bookings	Attended
<input type="checkbox"/>	Play and Stay (Community Centre)	20/12/2013			Community Centre	6	0
<input type="checkbox"/>	Food for Life (Clients Home)	19/12/2013			Clients Home	0	0
<input type="checkbox"/>	Play and Stay (Community Centre)	19/12/2013			Community Centre	0	0
<input type="checkbox"/>	Play and Stay (Community Centre)	18/12/2013			Community Centre	6	6
<input type="checkbox"/>	Food for Life (Clients Home)	17/12/2013			Clients Home	0	0
<input type="checkbox"/>	Play and Stay (Community Centre)	13/12/2013			Community Centre	0	4
<input type="checkbox"/>	Play and Stay (Community Centre)	11/12/2013			Community Centre	6	6

Further details can be obtained by clicking on the Show/Hide Help Information button.

Styles Key (Grid Row Style Session Status - Click to Expand):

Session Row Style
Monthly Session
Confirmed : Date in the Past with Attendances
UnConfirmed : Date in the Past with No Attendances
Booking (In the future) & Adhoc (Has attendances)
Cancelled : (cannot contain Attendances)
Row Select : Currently Selected Row

7.4. Bookings

The Bookings Tab lists all bookings for the selected session.

The tick box at the left of each row can be used to select individuals for inclusion in a Message Group or as recipients for a message by clicking the Send Message or Group button.

Clicking on a row will open the Individual Full Details window.

An example of the Bookings Tab is shown below.

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

ATTENDANCE >>> SESSION ANALYSIS

SESSION ANALYSIS

Session filters fields From 01 Dec 2013 To 31 Jan 2014 Activities Food for Life; Play an States Canceled Categories + Activities ☒ REFRESH

- Show/Hide Help Information -

- Search Criteria -
Session Date on or after : 01 Dec 2013;
Session Date before or on : 31 Jan 2014;
Activities : Food for Life; Play and Stay;
Activity State : Active Only

Summary Sessions Bookings Attendances Key Workers Booked Not Attended Attended Not Booked

Bookings (for Selected Sessions) - Show/Hide Help Information -

<input type="checkbox"/>	Name	Address	DOB	Tel.	Mobile
<input type="checkbox"/>	Miss Beata Zoborarov	45 Noah Lane Eastbourne BN23 9TR (East Side)	01/01/2008		
<input type="checkbox"/>	Miss Gertrude Crewe	8 Eagle Court Eastbourne BC3 6DF (North Side)	28/05/2007		
<input type="checkbox"/>	Master Gordon Le-mon	4 Harlow Park Eastbourne BN7 5SM (West Side)	22/10/2008		
<input type="checkbox"/>	Miss Jennifer Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)	27/07/2008		
<input type="checkbox"/>	Ms Paula Muir	5 Green Road Eastbourne BB2 5RF (South Side)	03/02/2008		
<input type="checkbox"/>	Master Phil Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)	15/11/2008		

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Further details can be obtained by clicking on the Show/Hide Help Information button.

7.5. Attendances

The Attendances Tab lists all attendances for the selected session.

The tick box at the left of each row can be used to select individuals for inclusion in a Message Group or as recipients for a message by clicking the Send Message or Group button.

Clicking on a row will open the Individual Full Details window.

An example of the Attendances Tab is shown below.

The screenshot shows the 'ChildView' interface with the 'Attendances' tab selected. The left sidebar contains navigation links: HOME, Search, Attendance, Input, Review, Barcode Registers, and Session Analysis. The main area displays 'SESSION ANALYSIS' with filters for 'From' (01 Dec 2013) and 'To' (31 Jan 2014). Below the filters, a 'Search Criteria' box lists session dates and activities. A tabbed interface at the bottom shows 'Attendees (for Selected Sessions)' with columns for Name, Address, DOB, Tel., and Mobile. The table lists six attendees, each with a checkbox in the first column.

	Name	Address	DOB	Tel.	Mobile
<input type="checkbox"/>	Miss Beata Zoborarov	45 Noah Lane Eastbourne BN23 9TR (East Side)	01/01/2008		
<input type="checkbox"/>	Miss Gertrude Crewe	8 Eagle Court Eastbourne BC3 6DF (North Side)	28/05/2007		
<input type="checkbox"/>	Master Gordon Le-mon	4 Harlow Park Eastbourne BN7 5SM (West Side)	22/10/2008		
<input type="checkbox"/>	Miss Jennifer Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)	27/07/2008		
<input type="checkbox"/>	Ms Paula Muir	5 Green Road Eastbourne BB2 5RF (South Side)	03/02/2008		
<input type="checkbox"/>	Master Phil Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)	15/11/2008		

Further details can be obtained by clicking on the Show/Hide Help Information button.

7.6. Key Workers

The Key Workers Tab lists all key workers assigned to the selected session.

The tick box at the left of each row can be used to select key workers for inclusion in a Message Group or as recipients for a message by clicking the Send Message or Group button.

Clicking on a row will open the Key Worker Information window.

An example of the Key Workers Tab is shown below.

The screenshot shows the ChildView software interface. The top bar indicates the user is 'SysAdmin' at 'Site 1'. The left sidebar contains navigation links: HOME, Search, Attendance, Input, Review, Barcode Registers, and Session Analysis. The main content area is titled 'SESSION ANALYSIS' and includes filters for 'Session filters fields' (From: 01 Dec 2013, To: 31 Jan 2014), 'Activities' (Food for Life; Play an), 'States', 'Cancelled Categories', and a '+ Activities' checkbox. A 'REFRESH' button is also present. Below the filters, a 'Search Criteria' section shows: 'Session Date on or after : 01 Dec 2013;', 'Session Date before or on : 31 Jan 2014;', 'Activities : Food for Life; Play and Stay;', and 'Activity State : Active Only'. A tabbed interface at the bottom of the main area includes 'Summary', 'Sessions', 'Bookings', 'Attendances', 'Key Workers' (selected), 'Booked Not Attended', and 'Attended Not Booked'. The 'Key Workers' tab displays a table with the following data:

<input type="checkbox"/>	Key Worker	Address	Tel	Mobile	Email
<input type="checkbox"/>	Sally Evans	12 Collingwood Place Eastbourne BN10 9FF	01155-678901	07941-888888	sallyevans@internet.com
<input type="checkbox"/>	Suki Ahsam				

At the bottom of the interface, there is a footer with copyright information: '© Copyright 2012 CACI. All rights reserved.' and a version number: 'v2.2.9 - Pre-Release Revision 20'.

Further details can be obtained by clicking on the Show/Hide Help Information button.

7.7. Booked not attended

The Booked Not Attended Tab lists all bookings for the selected session which did not result in an attendance.

The tick box at the left of each row can be used to select individuals for inclusion in a Message Group or as recipients for a message by clicking the Send Message or Group button.

The selected session can be edited by clicking the Edit Session button at the bottom right of the screen.

Clicking on a row will open the Individual Full Details window.

An example of the Booked Not Attended Tab is shown below.

The screenshot shows the ChildView 'The Children's Centre Manager' interface. The user is 'SysAdmin' at 'Site 1'. The 'SESSION ANALYSIS' section is active, with filters for 'From 01 Dec 2013' to 'To 31 Jan 2014', 'Activities: Food for Life; Play an', and 'States:'. A 'REFRESH' button is present. Below the filters, the 'Search Criteria' are displayed: 'Session Date on or after : 01 Dec 2013; Session Date before or on : 31 Jan 2014; Activities : Food for Life; Play and Stay; Activity State : Active Only'. The 'Booked Not Attended' tab is selected, showing a table of 'Booked Not Attended (Active Sessions) (for Selected Sessions)'. The table has columns for Session, Date, Name, and Address. The bottom of the screen shows a sidebar with 'Casework', 'Reports', 'Messaging', and 'System Admin' buttons, and a footer with 'Copyright 2012 C&C. All rights reserved' and 'v2.2.9 - Pre-Release Revision 29'.

Session	Date	Name	Address
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Miss Beata Zoborarov	45 Noah Lane Eastbourne BN23 9TR (East Side)
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Miss Gertrude Crewe	8 Eagle Court Eastbourne BC3 6DF (North Side)
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Master Gordon Le-mon	4 Harlow Park Eastbourne BN7 5SM (West Side)
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Miss Jennifer Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Ms Paula Muir	5 Green Road Eastbourne BB2 5RF (South Side)
<input type="checkbox"/> Play and Stay (Community Centre)	20 Dec 2013	Master Phil Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)

7.8. Attended not booked

The Attended Not Booked Tab lists all attendances for the selected session which did not have an associated booking.

The tick box at the left of each row can be used to select individuals for inclusion in a Message Group or as recipients for a message by clicking the Send Message or Group button.

The selected session can be edited by clicking the Edit Session button at the bottom right of the screen.

Clicking on a row will open the Individual Full Details window.

An example of the Attended Not Booked Tab is shown below.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

SESSION ANALYSIS

Session filters fields From: 01 Dec 2013 To: 31 Jan 2014 Activities: Food for Life; Play an States: Cancelled Categories: + Activities ☒ REFRESH

- Search Criteria -
Session Date on or after : 01 Dec 2013;
Session Date before or on : 31 Jan 2014;
Activities : Food for Life; Play and Stay;
Activity State : Active Only

Summary Sessions Bookings Attendances Key Workers Booked Not Attended **Attended Not Booked**

Attended Not Booked (Active Sessions) (for Selected Sessions)

	Session	Date	Name	Address
<input type="checkbox"/>	Play and Stay (Community Centre)	13 Dec 2013	Master Gordon Le-mon	4 Harlow Park Eastbourne BN7 5SM (West Side)
<input type="checkbox"/>	Play and Stay (Community Centre)	13 Dec 2013	Miss Jennifer Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)
<input type="checkbox"/>	Play and Stay (Community Centre)	13 Dec 2013	Ms Paula Muir	5 Green Road Eastbourne BB2 5RF (South Side)
<input type="checkbox"/>	Play and Stay (Community Centre)	13 Dec 2013	Master Phil Gander	49 Norman Road Treetops Estate Eastbourne BN10 9LJ (North Side)

Casework
Reports
Messaging
System Admin

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8. Reports

The Reports option allows CCM users to run custom created reports that have been added to the database.

When the screen is first loaded the 'All Reports' tab will show detailing every report the user has the rights to run. Clicking one of the other tabs at the top of the screen will only show those reports assigned to that category.



To order reports alphabetically, click on the word 'name' in the reports column header.

8.1. Running a report

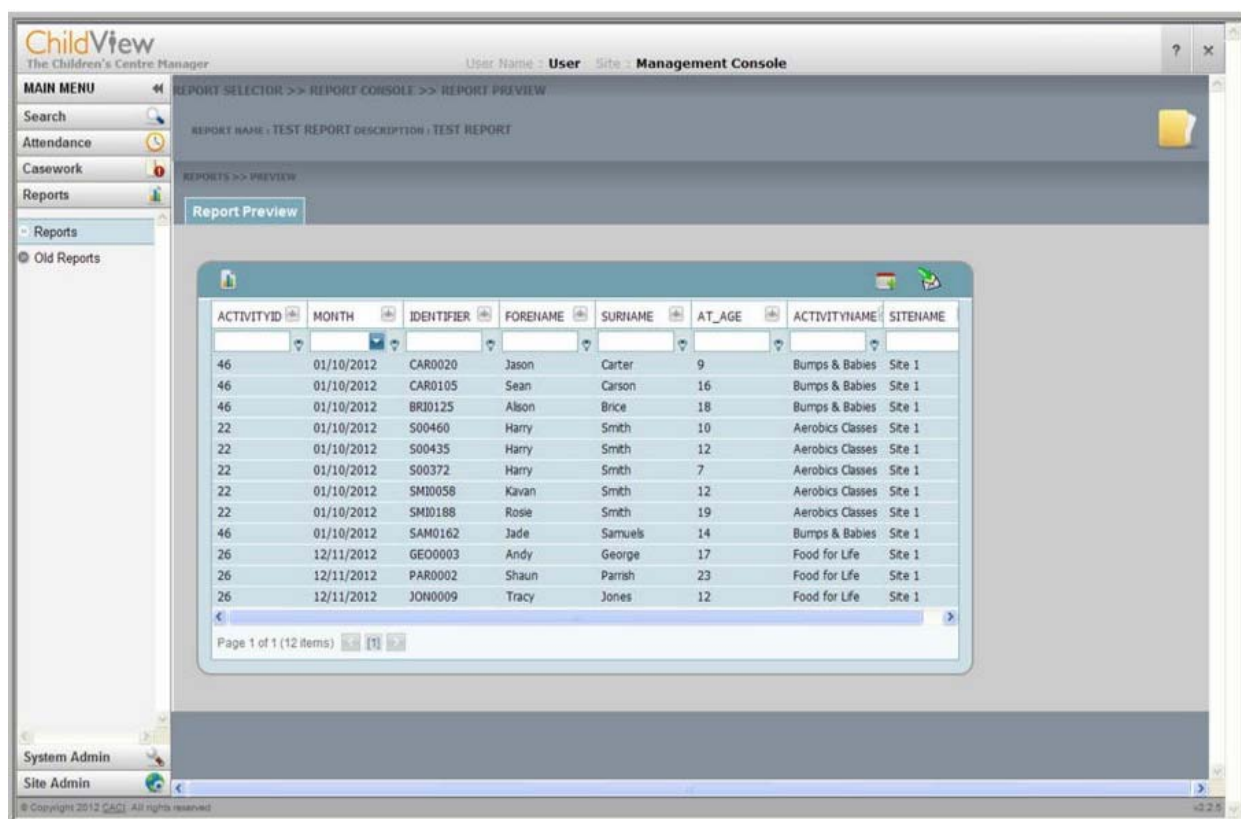
1. Click on the relevant tab to view the available reports (all performance data reports are in the 'Performance Measures' tab).
2. Click on the graph icon that is relevant to the query you wish to run.
3. If you are required to specify any parameters the query needs, for example site name or date range, then a screen will show where you can input those.

The screenshot shows a web interface titled "Parameters & Designs". It contains several input fields: "Please Select Site" with a dropdown arrow, "Please Enter Start Date" with a dropdown arrow, "Please Enter End Date" with a dropdown arrow, and "Compare with the past period start" with a text input field. Below these fields is a section titled "Designs exist for the selected report. In order to use one of these, select one from the 'Design Options' list below :". It includes a "Design Options" dropdown menu currently showing "(none selected)". At the bottom right, there are two buttons: "Toggle View SQL" and "Produce Report".

Note: Compare with the past period start will compare the data from the time period specified in the date fields with past data. A number must be entered in this field to represent the number of past months you would like to make the comparison with. For example to compare the previous year's data enter 12.

4. Once you have entered the required parameters press the 'Produce Report' button.
5. The results of the query will then be shown. For example:

Table view:



ChildView
The Children's Centre Manager

User Name : User Site : Management Console

REPORT SELECTOR >> REPORT CONSOLE >> REPORT PREVIEW

REPORT NAME : TEST REPORT DESCRIPTION : TEST REPORT

REPORTS >> PREVIEW

Report Preview

ACTIVITYID	MONTH	IDENTIFIER	FORENAME	SURNAME	AT_AGE	ACTIVITYNAME	SITEMNAME
46	01/10/2012	CAR0020	Jason	Carter	9	Bumps & Babies	Site 1
46	01/10/2012	CAR0105	Sean	Carson	16	Bumps & Babies	Site 1
46	01/10/2012	BR00125	Alson	Brice	18	Bumps & Babies	Site 1
22	01/10/2012	S00460	Harry	Smith	10	Aerobics Classes	Site 1
22	01/10/2012	S00435	Harry	Smith	12	Aerobics Classes	Site 1
22	01/10/2012	S00372	Harry	Smith	7	Aerobics Classes	Site 1
22	01/10/2012	SM00058	Kavan	Smith	12	Aerobics Classes	Site 1
22	01/10/2012	SM00188	Rosie	Smith	19	Aerobics Classes	Site 1
46	01/10/2012	SAM0162	Jade	Samuels	14	Bumps & Babies	Site 1
26	12/11/2012	GEO0003	Andy	George	17	Food for Life	Site 1
26	12/11/2012	PAR0002	Shaun	Parrish	23	Food for Life	Site 1
26	12/11/2012	JON0009	Tracy	Jones	12	Food for Life	Site 1

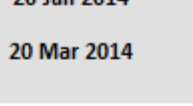
Page 1 of 1 (12 items)

System Admin
Site Admin

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Once your results have been returned you can further filter the results by using the filtering options available in this grid.

Report template view:

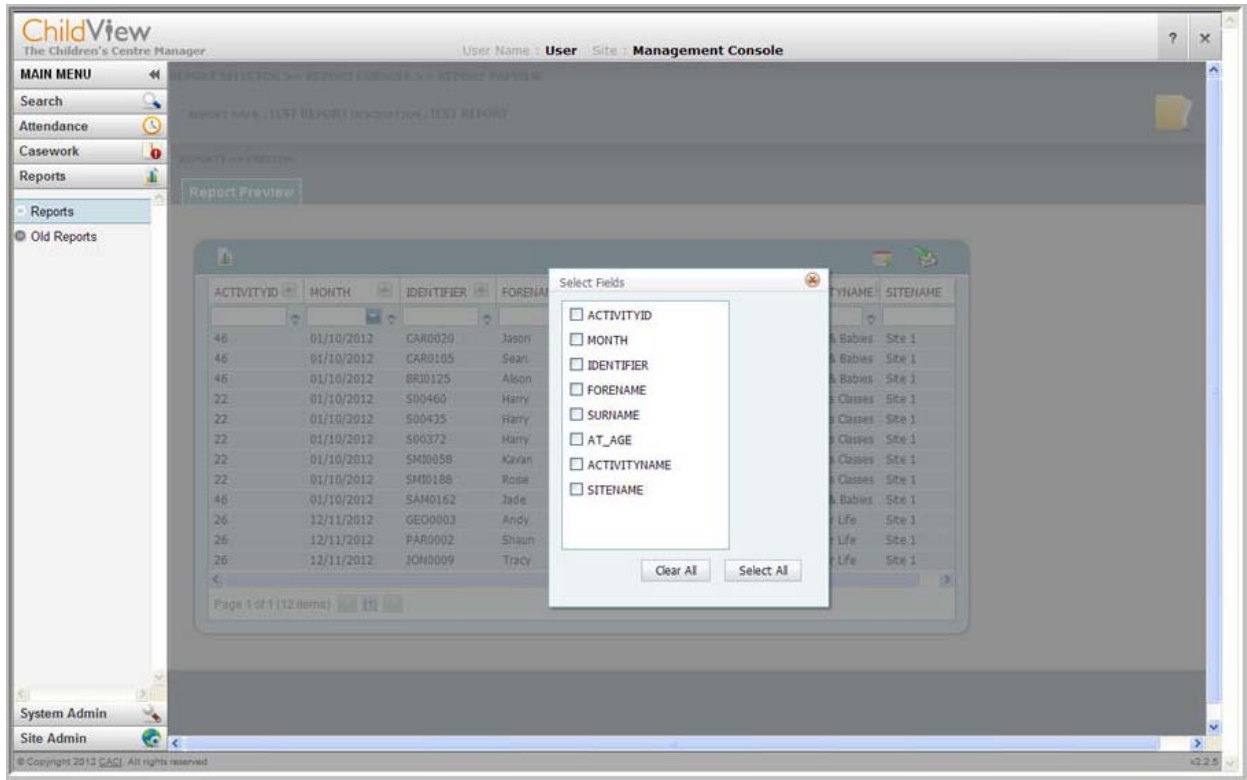
Barnfield			
A1 - No. of families registered/affiliated with the Children's Centre			
Run for the Period :	01 Apr 2014	to	20 Jun 2014
Compared with :	01 Jan 2014	to	20 Mar 2014
<u>Total number of families</u>			
	Families Seen This Period		207
	Percentage Difference		16.29%
<u>Number of families that live in the children's centre reach area</u>			
	Families Seen This Period		99
	Percentage Difference		2.06%
<u>Number of families that live in Barnet (i.e. anywhere but in the reach area)</u>			
	Families Seen This Period		63
	Percentage Difference		34.04%
<u>Number of families that live out of borough</u>			
	Families Seen This Period		45
	Percentage Difference		32.35%


Page(s) : 1/5

Field Chooser




Clicking the 'Field Chooser' icon opens a box where you can configure which columns of information are shown on screen and also in any export you undertake. For example:



Tick the fields you want to include and un-tick the fields you don't want. Once you have made your selection click the  icon located at the top right of the box to return to the previous screen.

The result grid will update accordingly.

Exporting the results

Should you wish to export the results of the report, hover over the  icon and a list of available options will show:

The screenshot shows the ChildView Management Console interface. The top navigation bar includes 'MAIN MENU' with links to Search, Attendance, Casework, and Reports. The 'Reports' section is expanded, showing 'Report Preview'. The main area displays a table of report data. A context menu is open over the table, showing options to 'Extract the Data' in various formats: PDF, RTF, XLS, and XML.

ACTIVITYID	MONTH	IDENTIFIER	FORENAME	SURNAME	AT_AGE	ACTIVITYNAME	SIT
46	01/10/2012	CAR0020	Jason	Carter	9	Bumps & Babies	Site
46	01/10/2012	CAR0105	Sean	Carson	16	Bumps & Babies	Site
46	01/10/2012	BRJ0125	Alison	Brice	18	Bumps & Babies	Site
22	01/10/2012	S00460	Harry	Smith	10	Aerobics Classes	Site
22	01/10/2012	S00435	Harry	Smith	12	Aerobics Classes	Site
22	01/10/2012	S00372	Harry	Smith	7	Aerobics Classes	Site
22	01/10/2012	SMI0058	Kavan	Smith	12	Aerobics Classes	Site 1
22	01/10/2012	SMI0188	Rosie	Smith	19	Aerobics Classes	Site 1
46	01/10/2012	SAM0162	Jade	Samuels	14	Bumps & Babies	Site 1
26	12/11/2012	GEO0003	Andy	George	17	Food for Life	Site 1
26	12/11/2012	PAR0002	Shaun	Parrish	23	Food for Life	Site 1
26	12/11/2012	JON0009	Tracy	Jones	12	Food for Life	Site 1

Page 1 of 1 (12 items)

Click the relevant option.

Note: both the CSV and XLS exported files can be opened in Microsoft Excel.

9. Advanced Search

9.1. Advanced search overview

The Advanced Search option will allow you to search for individuals (records) in the database and; if required; their associated attendance(s) using a larger number of filtering criteria than available via the Mail Merge / Data Extract Screen or the Attendance Review screen.

Advanced Search works on a 2 step process:



As such attendance information can only be found for those individuals that have been retrieved during the initial individual search phase.

To access Advanced Search, click on the Search menu item on the left hand side of the screen and then click the Advanced Search option. You will be presented with a screen similar to the following:

A large number of filters are available in Advanced Search, and due to this the filters have been gathered into their respective tabs and; in some instances; into different headings within those tabs. The various filters are accessed by clicking on the respective tab at the top of the screen, and where necessary selecting the sub Group heading.

In the example above, we have searched on the word 'smith' in the name filter of the basic search screen, as well as specifying some location criteria where individuals are based. We can tell that filters have been set in other tabs as the tab text is shown in yellow.

Pressing the 'Apply Individual Filter' button will show the results of our individual search in grid format:

The screenshot shows the ChildView Advanced Search interface. The left sidebar contains navigation links: HOME, Search, Family, People, Add Family Wizard, Advanced Search (highlighted), Service Providers, Mail Merge, and Data Extract. The main area displays a table of search results for individuals. The table has columns for Name, Address, Postcode, Identifier, Telephone, DoB, Age, and Gender. The results list 12 individuals, all with the name 'Smith'.

Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S	BN9 9YY	S00372	-	03/03/2005	8	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	S00435	-	02/04/2000	13	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	-	12/05/2002	11	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0189	-	30/03/1995	18	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0188	-	19/10/1992	20	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East	BN31 6DM	SMI0093	01253 223344	24/01/1971	42	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	43	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	18	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0058	-	11/01/2000	13	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0186	01253 223344	08/11/1966	46	Female

The interface also includes a 'Filter Text' input field at the top of the results area and a 'CLICK FOR FILTERS' button on the left. The bottom of the screen shows pagination information: 'Page 1 of 1' and 'View 1 - 12 of 12'.

Generating a list of results

Advanced Search uses a 2 step process to retrieve information about individuals and associated attendances. Step one is to create a cohort of individuals, and step two is to retrieve attendance information about those individuals (if required).

In each step a number of different filter types are available - please see the topic Section 10.1.3: Filter types available for details on the different filtering mechanisms.

Note: Advanced Search works on an 'and' basis. For example, when doing an individual search and specifying Registered AND Age 3 AND Lives in a certain town, the results returned will be where individuals meet all 3 criteria. You are unable to do OR searches i.e. children aged 3 OR children aged 4.

Individual Search

1. Select the relevant Individual filter tabs and then select the options appropriate to your search (See Section 10.2: Individual Filter tabs for information about the options available).
2. Press the 'Apply Individual Filter' button to retrieve your search results.
3. Your search results will show in a grid on the screen, and your filter page will 'slide' to the left and be hidden from view. Click on the 'Click For Filters' text to re-display the main filter page. Click again to hide.

Note: by default the individual search will not include any deceased individuals or those who are classified as living at an archived address. Should you wish to include these individuals in your search results you will need to set the respective filters.

Once you have retrieved your cohort of individuals the 3 tabs with filters related to Attendance information will become available as well as the 'Apply Attendance Filter' button:



You can now retrieve attendance information if required.

Attendance Search

1. Select the relevant Attendance filter tabs and then select the options appropriate to your search (See section 10.3: Attendance Filter tabs for information about the options available).
2. Press the 'Apply Attendance Filter' button to retrieve your search results.
3. Your results will show on the screen, and your filters will 'slide' to the left and be hidden from view. Click on the 'Click For Filters' text to shown the main filter page. Click again to hide.

Three Grids of information will be populated:

- Attendance information for individuals.
- No attendance information for individuals i.e. those individuals who have not attended an activity or session.
- Family attendance information i.e. address information for those people who have attended an activity or session, along with the correspondee name (if available).

Whilst your search results are being retrieved all the buttons at the top of the Advanced Search screen will be disabled until the three grids are populated.

Note: You can only retrieve attendance information for up to 15,000 individuals. If you have more than this number returned from your individual search, pressing the attendance filter button will provide a prompt asking you to reduce the number:



Clear Filter button

To remove any filters that have been set press the 'Clear Filter' button.

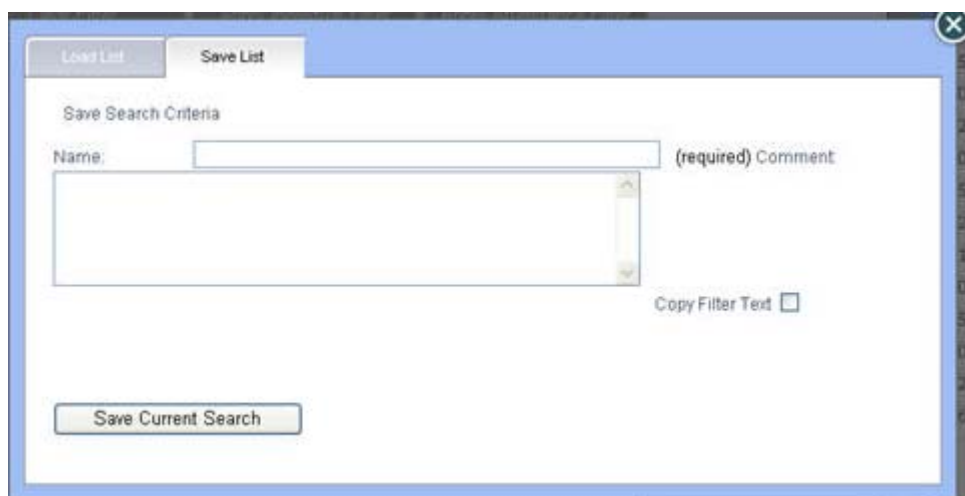
Manage Saved Lists button

It is possible to save and then re load the criteria specified for an individual search. It is also possible to delete an existing saved individual search.

Note: Pressing the 'X' at the top right of the Saved Lists dialog box will return you to the main filter page.

Saving an individual search

1. Once you have specified your filters press the 'Manage Saved Lists' button to open the load & save list dialog box:



2. Select the 'Save List' tab.

3. Enter a suitable name for the search criteria.
4. You can either enter a suitable comment or else copy the filter text by ticking the 'Copy Filter Text' check box (filter text is discussed in section 10.1.2: Search Results).

Save Search Criteria

Name: (required) Comment:

Copy Filter Text ☒

5. Press the 'Save Current Search' button to save your search criteria.

Loading saved search criteria

1. Press the 'Manage Saved Lists' button.
2. Select the 'Load List' tab if this is not shown by default.
3. Select the required search from the drop down list:

Load List

Load Saved List

Created:

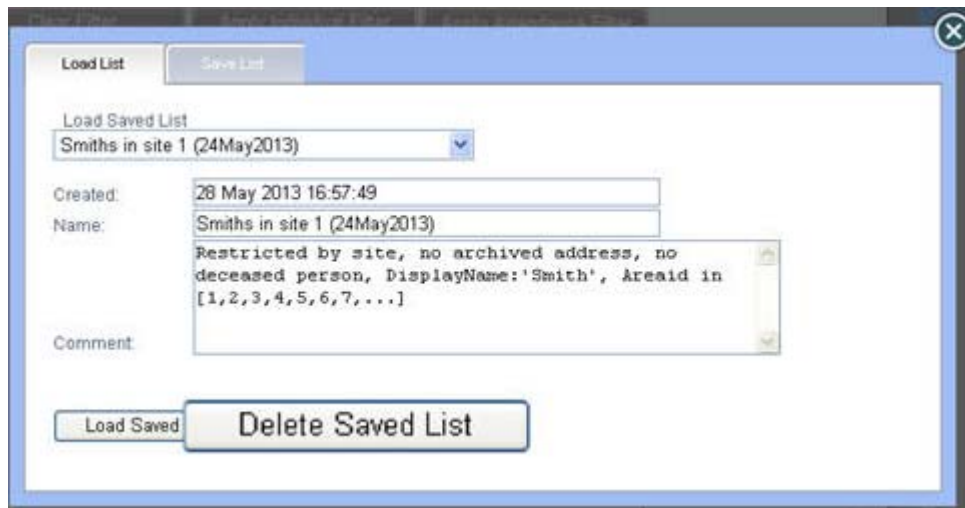
Name:

Comment:

4. Press the 'Load Saved List' button.
5. Once your list has been loaded pressing the 'Apply Individual Filter' button will return the list of individuals who meet the set filter criteria.

Deleting saved search criteria

1. Press the 'Manage Saved Lists' button.
2. Select the 'Load List' tab.
3. Select the required search from the drop down list.



4. Press the 'Delete Saved List' button.

Search results

The output from searches undertaken are shown in a number of sections on the screen.

Filter text

The filter text gives an indication as to the filters being used when undertaking an Individual Search. This can be useful information to help understand what filters were being used if you perceive that your individual search results are incorrect. For example:



You can open or close the filter text section by using the arrow located at top right of the Filter Text panel.

Individual Search results

Undertaking an Individual search will show all those individuals meeting the search criteria in a single grid:

The screenshot shows the 'ChildView' interface with the 'Advanced Search' tab selected. The search results are displayed in a table with the following columns: Name, Address, Postcode, Identifier, Telephone, DoB, Age, and Gender. The results list 15 individuals, including Harry Smith, Miss Ann Smith, Miss June Smith, Miss Rosie Smith, Miss Wendy Smith, Mr Chris Smith, Mr Dean Smith, Mr Kavan Smith, Mr Paul Smith, and Mrs Gaye Smith. The interface also includes a sidebar with navigation options like 'Family', 'People', 'Add Family Wizard', 'Advanced Search', 'Service Providers', 'Mail Merge', and 'Data Extract'. At the bottom, it shows 'Page 1 of 1' and 'View 1 - 12 of 12'.

Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S BN9 9YY	BN9 9YY	S00372	-	03/03/2005	8	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	S00435	-	02/04/2000	13	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side) BN5 6TF	BN5 6TF	S00460	-	12/05/2002	11	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0189	-	30/03/1995	18	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0188	-	19/10/1992	20	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East : BN31 6DM	BN31 6DM	SMI0093	01253 223344	24/01/1971	42	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0057	01253 223344	13/02/1970	43	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0059	-	08/03/1995	18	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0058	-	11/01/2000	13	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0186	01253 223344	08/11/1966	46	Female

Deceased individuals are excluded from the results by default. Such individuals can be included by using the setting in the Advanced Search Health Tab but they will have a different formatting applied in the search results (all columns except the address column are in grey italics). In the following image Peter Smith is classed as deceased:

This screenshot shows the same search results as the previous one, but with an additional row at the bottom for 'Peter Smith'. This row is formatted with grey italics for all columns except the 'Address' column, indicating that the individual is deceased. The table structure and other rows remain the same.

Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S BN9 9YY	BN9 9YY	S00372	-	03/03/2005	8	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	S00435	-	02/04/2000	13	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side) BN5 6TF	BN5 6TF	S00460	-	12/05/2002	11	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0189	-	30/03/1995	18	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0188	-	19/10/1992	20	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East : BN31 6DM	BN31 6DM	SMI0093	01253 223344	24/01/1971	42	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0057	01253 223344	13/02/1970	43	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0059	-	08/03/1995	18	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB2 5RF	BB2 5RF	SMI0058	-	11/01/2000	13	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC3 6DF	BC3 6DF	SMI0186	01253 223344	08/11/1966	46	Female
<i>Peter Smith</i>	36 Fieldside View Eastbourne BC21 2LZ (Outside BC21 2LZ	BC21 2LZ	<i>S00152</i>	<i>-</i>	<i>02/06/1973</i>	<i>39</i>	<i>Male</i>

Filter types available

Any individuals that are registered at an archived address will have a different formatting applied to them in the search results (the address column and the option address archived column is in blue bold). In the following image Bella Smith and Frank Smith both live at archived addresses:

Search Results People							
Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Bella Smith	20 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0081	-	15/07/1991	21	Female
Frank Smith	5 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00382	-	02/05/2002	10	Male
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	S00372	-	03/03/2005	7	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	S00435	-	02/04/2000	12	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	-	12/05/2002	10	Male
Jimmy Smith	5 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00383	-	02/08/2002	10	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0188	-	19/10/1992	19	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East Side)	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	17	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0058	-	11/01/2000	12	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female
Mrs Julie Smith	20 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0080	01234 765234	01/01/1966	46	Female

Attendance Search Results

This will show information in 3 separate grids:

- Attendance information for those individuals returned as part of the individual search. By default no duplicate entries of individuals will be shown in the list e.g. if John Smith attended both a Bumps & babies and also a computer course, his name will only show in the list once. If 'Show Duplicates' was enabled then his name would occur for each separate activity type attended - in this case twice.

Advanced Search			
Filter Text			
Search Results People			
Search Results Attendance (no duplicates) - Default time period is the last 180 days			
Name	Identifier	Age	Gender
Harry Smith	S00372	7	Male
Harry Smith	S00435	12	Male
Harry Smith	S00460	10	Male
Mr Kavan Smith	SMI0058	12	Male
Miss Rosie Smith	SMI0188	19	Female

- No attendance information for those individuals returned as part of the individual search i.e. those individuals who have not attended an activity or session.

Search Results No Attendance							
Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East Side)	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	17	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female

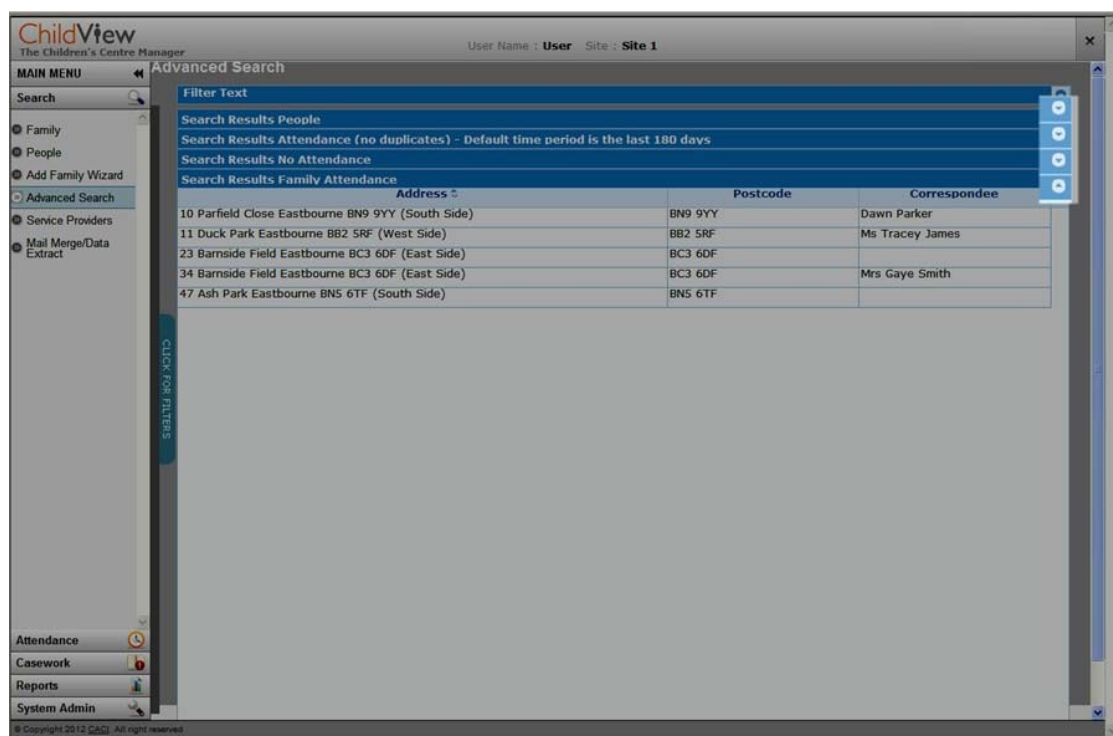
- Family attendance information i.e. address information for those people who have attended an activity or session, along with the correspondee name (if available).

Search Results Family Attendance		
Address	Postcode	Correspondee
10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	Dawn Parker
11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	Ms Tracey James
23 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	
34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	Mrs Gaye Smith
47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	

General Grid functionality available

Opening or closing search result panels

Search grids can be in an open or closed status by using the arrow located at top right of each search grid:



Total number of records returned

At the bottom right of each search result grid you will find the total number of records that meet the specified filter criteria, along with which records are currently being displayed:

View 1 - 25 of 255

Navigating through the search results

You can navigate through the search results by clicking the relevant arrows at the bottom of each grid or typing the relevant page number:



Mouse click functionality

- Clicking a row with the Left Mouse Button will select that row in the search result grid. The selected row will be shown in yellow:

Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	S00372	-	03/03/2005	7	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	S00435	-	02/04/2000	12	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	-	12/05/2002	10	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0188	-	19/10/1992	19	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East Side)	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	17	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0058	-	11/01/2000	12	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female

- Clicking the Right Mouse Button will pop up a menu showing the various options available. The contents of this pop up will depend upon which search result grid you have clicked in.

Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	S00372	-	03/03/2005	7	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	S00435	-	02/04/2000	12	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	-	12/05/2002	10	Male
Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0188	-	19/10/1992	19	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East Side)	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	17	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0058	-	11/01/2000	12	Male
Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Side)	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female

- If you wish to view an individuals Full Details, Family Support Workers or Family Indicators you must select the individual in question and then choose the applicable option from the

pop up menu (Note: These options are only available in the pop up menu for the People search results).

- It is possible to view additional columns in a search result grid. Right Mouse click in the grid in question, and select the 'Choose Columns' option in the pop up menu. You will then be shown a list of available columns. Tick those that you wish to see, un-tick those that you do not require. For example the individual search result grid has the following options available:
- Click the 'X' to close the window once you have made your changes.
Note: This option only effects the columns shown in the grid and does not affect the data that can be exported from the database.

Data export

The Search results can be exported out of the database by selecting the applicable option from the pop up menu.

The People Search result screen will allow you to export the list in XML, .csv or CTF format. The data exported contains the majority of the information held in the individuals full details screens.

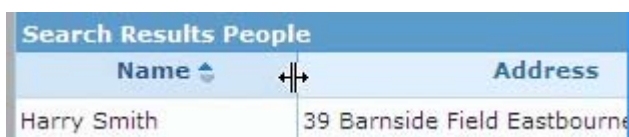
The Attendance search result screen allows you to export the list in XML or .csv format. The data exported contains information about individual details captured at the time the attendance was recorded e.g. age when they attended the activity or session, the address they were living at, the ID of the Site they attended (AttendanceSID), ...

The No Attendance search result screen allows you to export the list in XML or .csv format. The data exported contains the majority of the information held in the individuals full details screens.

The family Attendance search result screen allows you to export the list in XML or .csv format. The data contains address information and also the name of the correspondee if available, for those individuals shown in the Attendance search result screen.

Column Widths

If you click and hold the mouse pointer over the line that divides two column headers, you will be able to drag the mouse to re-size the column width. You need to ensure that the mouse icon change to that shown in the image below:



Search Results People	
Name	Address
Harry Smith	39 Barnside Field Eastbourne

Column Header sorting

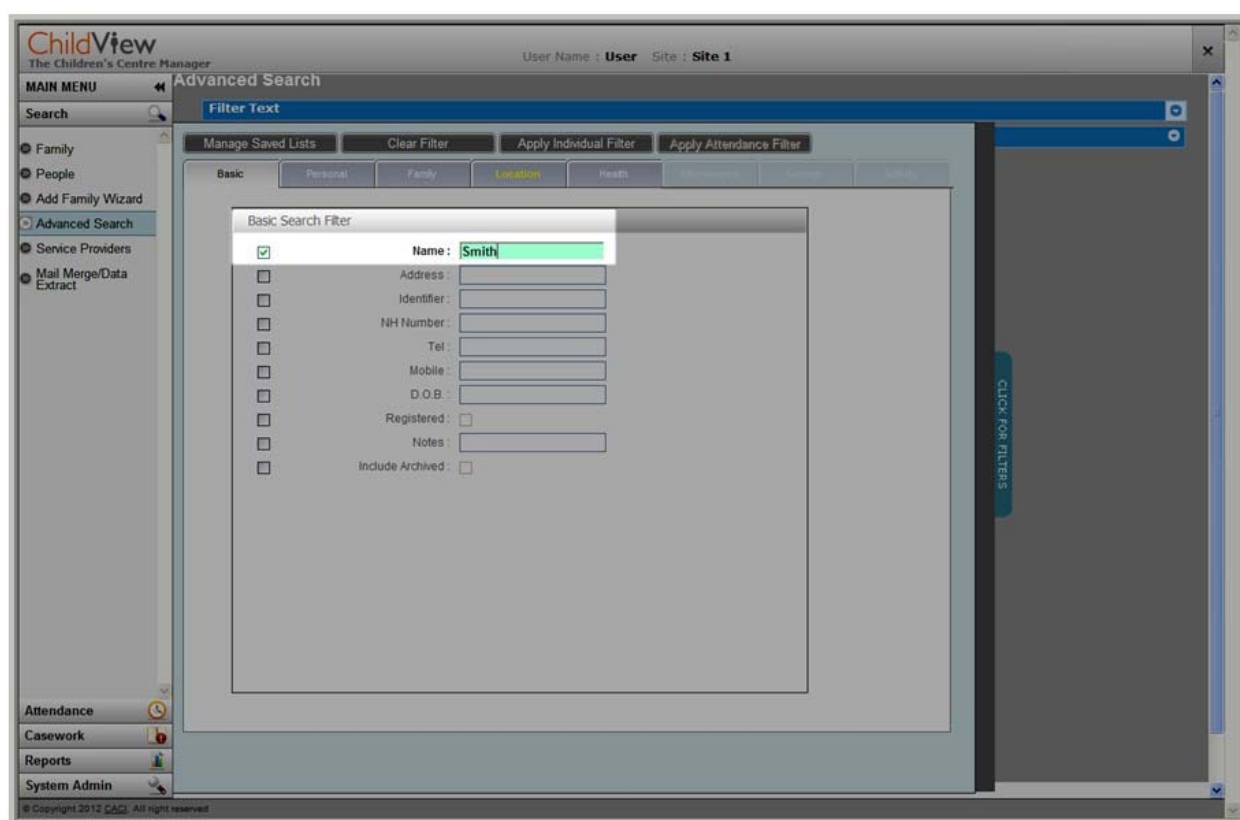
If you click on any of the Column Header buttons, you will sort the list into order based on the information in that column. If you keep clicking the same button, it will sort the data alternately in A-to-Z, then Z-to-A order.

9.2. Filter types available

There are a number of different filter types available in Advanced Search, and each filter that you wish to use needs to be enabled by having a tick in the check box at the left of the applicable panel:

Free Text Filter

Free text filters allow you to search on data that contains the text entered. For example entering the word 'son' in the Name filter will return 'John Simpson' and 'Alison Smith'.



Yes / No Filters

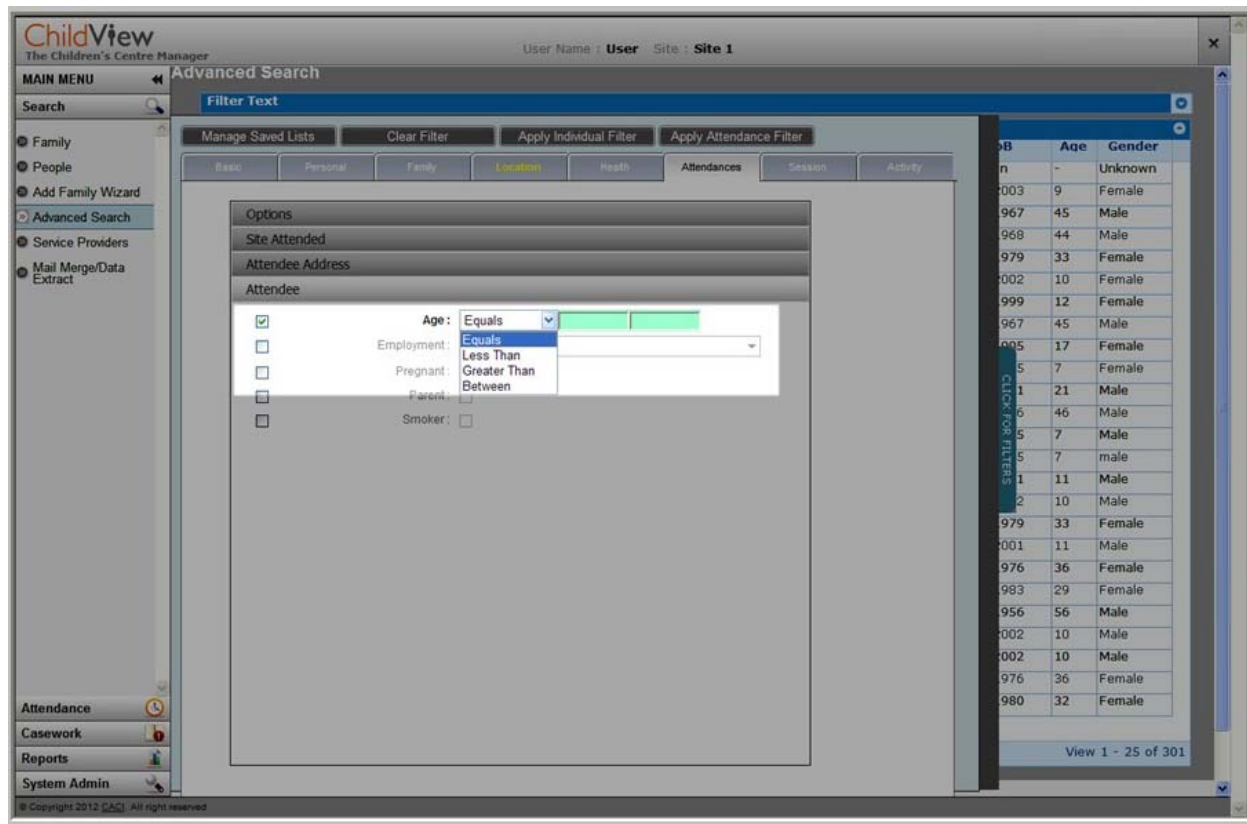
Yes / No filters also require an applicable setting i.e. tick smoker to search for individuals who smoke, un-tick to search for those who do not smoke:

The screenshot displays the ChildView 'Advanced Search' window. The 'Health' tab is selected, showing a list of filters. The 'Smoker' checkbox is checked, indicating the search will include individuals who smoke. Other filters include 'Include Deceased', 'Date of Death', 'Cause Of Death', 'Diagnosed Obese', 'Activity Level', 'PND', 'No Plasters', 'Body Mass Index', 'Height (m)', 'Weight (kg)', 'Cholesterol LDL', 'Cholesterol HDL', 'Blood Pr. Diag mmHg', 'Blood Pr. Sys mmHg', 'Pulse Rate (BPM)', and 'Doctor'. A vertical button on the right side of the filter panel is labeled 'CLICK FOR FILTERS'. The interface also shows a 'MAIN MENU' on the left and a 'User Name : User Site : Site 1' header.

If the smoker filter was not enabled then the search results would contain all those individuals who do or do not smoke.

Numerical filters

Numerical filters allow for different search criteria to be used, and the applicable option can be selected from the drop down list. Enter your numerical value in the left hand box unless you select the 'Between' option in which case you will need to enter a value in both boxes.



Equals - This will return results that equal the value entered in the search box.

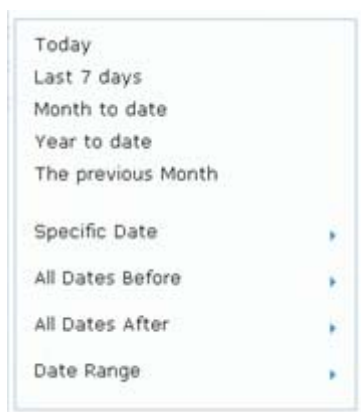
Less Than - This will return all results that are less than the value entered in the search box.

Greater Than - This will return all results that are greater than the value entered in the search box.

Between - This will return all results that are between the values entered in both search boxes. Note the results will not include those values specified. e.g. Searching between the values of 1 and 5 will return 2, 3 and 4.

Date filters

Date fields provide for a range of search criteria to be used. Select the applicable option from the pop up menu shown when you click in the date field:



Drop down lists

Drop down lists can cater for multiple selections. Tick those entries you wish to use.

9.3. Individual filter tabs

9.3.1 Basic

This tab allows you to specify basic filter information.

Note: The 'Name' filter will search on the individuals forename, middle name, surname and 'known as' fields (as shown in the Individuals Full Details screen).

9.3.2 Personal

The personal tab allows you to specify which filters you wish to use around the individuals personal status i.e. Registered Site details, Nationality, correspondee flag etc.

As well as a Personal Grouping, there is also a Nationality Grouping. Clicking this header allows you to use the following options:

9.3.3 Family

As well as allowing you to set filters specific to Child, Adults or Family Requirements (support workers, special needs and disabilities), it is possible to use the Groups section to identify children of a certain age, specifying if you wish to include archived addresses or specify those individuals where a Date of Birth has not been set.

The screenshot displays the CCM Superuser Guide interface. At the top, there are four buttons: "Manage Saved Lists", "Clear Filter", "Apply Individual Filter", and "Apply Attendance Filter". Below these are several tabs: "Basic", "Personal", "Family" (which is selected), "Location", "Health", "Attendance", "Support", and "Age 13". The "Family" tab is active, and a "Groups" section is visible. This section contains a list of checkboxes for various age groups and filters:

- ☐ Age 0 : ☐
- ☐ Age 1 : ☐
- ☐ Age 2 : ☐
- ☐ Age 3 : ☐
- ☐ Age 4 : ☐
- ☐ Age 5 : ☐
- ☐ Age Under 4 : ☐
- ☐ Age Under 5 : ☐
- ☐ DoB not set : ☐
- ☐ Archived Addresses : ☐

Below the "Groups" section, there are three tabs: "Adult", "Child", and "Family Requirements". On the right side of the interface, there is a vertical button labeled "CLICK FOR FILTERS".

The Adult Grouping allows you to use the following filters:

Manage Saved Lists Clear Filter Apply Individual Filter Apply Attendance Filter

Basic Personal **Family** Location Health Attendances Session Activity

Groups

Adult

☐ Parent : ☐

☐ Lone Parent : ☐

☐ Teenage Parent : ☐

☐ Pregnant : ☐

☐ Employment : Select options

☐ Due Date :

☐ NI Number :

☐ Unique Tax Ref. :

☐ Driver Number :

☐ Electoral Role Ref. :

☐ General Identifier :

Child

Family Requirements

CLICK FOR FILTERS

The Child Grouping allows you to use the following filters:

Manage Saved Lists Clear Filter Apply Individual Filter Apply Attendance Filter

Basic Personal **Family** Location Health Attendances Session Activity

Groups

Adult

Child

☐ Birthweight : Equals

☐ Gestation : Equals

☐ Childcare Needs : Select options

☐ Breast fed at birth : ☐

☐ Breast fed at 6 weeks : ☐

☐ Breast fed at 4 months : ☐

☐ Is a Child : ☐

☐ Unique Pupil Number :

☐ Enrolled In NM : ☐

☐ Attends a Nursery : ☐

☐ Caring For Parent : ☐

☐ Caring For Sibling : ☐

Family Requirements

CLICK FOR FILTERS

The Family Requirements Grouping allows you to use the following filters:

The screenshot shows the 'Family' tab selected in the top navigation bar. Below the tabs, there are buttons for 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. The main content area is titled 'Groups' and includes sections for 'Adult', 'Child', and 'Family Requirements'. Under 'Family Requirements', there are three filter options, each with a checkbox and a dropdown menu: 'Support Workers : Select options', 'Special Needs : Select options', and 'Disabilities : Select options'. On the right side of the interface, there is a vertical button labeled 'CLICK FOR FILTERS'.

9.3.4 Location

The location tab allow you to specify specific address information as well as use filters related to how address are grouped in the data base. For example people living in specific areas or those addresses that have a certain deprivation index value.

The screenshot shows the 'Location' tab selected in the top navigation bar. Below the tabs, there are buttons for 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. The main content area is titled 'Address' and includes a list of filter options, each with a checkbox and a text input or dropdown menu: 'House Number :', 'House Name :', 'Street :', 'Line 2 :', 'Town : Select options', 'Postcode :', 'Ward : Select options', 'County : Select options', and 'Country : Select options'. At the bottom of the main content area, there is a section titled 'Areas'. On the right side of the interface, there is a vertical button labeled 'CLICK FOR FILTERS'.

The Area Grouping allows you to use the following filters:

Manage Saved Lists Clear Filter Apply Individual Filter Apply Attendance Filter

Basic Personal Family **Location** Health Attendances Session Activity

Address

Areas

☐ Area: Select options

☐ SOA: Select options

☐ District: Select options

☐ Deprivation Index: Equals

☐ Site to Search: Select options

CLICK FOR FILTERS

Note: by default 'site to search' will be selected when logged in as a children's centre. You should always un-tick this as it will search all out of borough addresses as well as your reach area addresses.

9.3.5 Health

This tab allows you to specify criteria around an individual's health:

Manage Saved Lists Clear Filter Apply Individual Filter Apply Attendance Filter

Basic Personal Family Location **Health** Attendances Session Activity

Health

☐ Smoker: ☐

☐ Include Deceased: ☐

☐ Date of Death:

☐ Cause Of Death: Select options

☐ Diagnosed Obese: Select options

☐ Activity Level: Select options

☐ PND: ☐

☐ No Plasters: ☐

☐ Body Mass Index: Equals

☐ Height (m): Equals

☐ Weight (kg): Equals

☐ Cholesterol LDL: Equals

☐ Cholesterol HDL: Equals

☐ Blood Pr. Diag mmHg: Equals

☐ Blood Pr. Sys mmHg: Equals

☐ Pulse Rate (BPM): Equals

☐ Doctor: Select options

CLICK FOR FILTERS

9.4. Attendance filter tabs

9.4.1 Attendances

This tab allows you to specify filters about attendance information captured at the time an attendance was registered on the system, For example age of the person when they attended, the address they lived at, which Children Centre site individuals attended, were they classed as a smoker etc.

Note: if you are looking at all children aged under 5 when they attended a session in the last year you should not enter an age before applying the individual filter. The age should be input in the attendee grouping.

If Show duplicates is enabled then duplicates entries of individuals will be shown in the list e.g. if John Smith attended both a bumps & babies and also a computer course, his name would occur for each separate activity type attended - in this case twice.

The screenshot displays the 'Attendances' filter tab in the CCM Superuser Guide. The interface features a top navigation bar with buttons for 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. Below this is a tabbed interface with 'Basic', 'Personal', 'Family', 'Location', 'Health', 'Attendances', 'Session', and 'Activity'. The 'Attendances' tab is active. A large 'Options' panel is visible, containing two checkboxes: 'Show Duplicates' (unchecked) and 'Attendance Dates' (checked). Below the 'Options' panel are three input fields: 'Site Attended', 'Attendee Address', and 'Attendee'. On the right side of the interface, there is a vertical sidebar with a 'CLICK FOR FILTERS' button and a list of filter categories.

The Site Attended Grouping allows you to select the centre attended.

The Attendee Address Grouping allows you to use the following filters:

The screenshot shows the 'Attendee Address' filter section within the 'Attendee' tab. The interface includes a top navigation bar with buttons: 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. Below this is a tabbed interface with 'Basic', 'Personal', 'Family' (selected), 'Location', 'Health', 'Attendances', 'Session', and 'Activity'. The 'Attendee' tab is active, showing a list of attendees on the right. The 'Attendee Address' filter section contains the following fields:

- ☐ Street:
- ☐ Line2:
- ☐ Town:
- ☐ Postcode:
- ☐ Site:
- ☐ External: ☐

A vertical bar on the right side of the interface contains a 'CLICK FOR FILTERS' button and a list of attendees with checkboxes.

The Attendee Grouping allows you to use the following filters:

The screenshot shows the 'Attendee' filter section within the 'Attendee' tab. The interface includes a top navigation bar with buttons: 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. Below this is a tabbed interface with 'Basic', 'Personal', 'Family' (selected), 'Location', 'Health', 'Attendances', 'Session', and 'Activity'. The 'Attendee' tab is active, showing a list of attendees on the right. The 'Attendee' filter section contains the following fields:

- ☐ Age:
- ☐ Employment:
- ☐ Pregnant: ☐
- ☐ Parent: ☐
- ☐ Smoker: ☐

A vertical bar on the right side of the interface contains a 'CLICK FOR FILTERS' button and a list of attendees with checkboxes.

Note: If you are looking at all children aged under 5 when they attended a session in the last year you should not enter an age before applying the individual filter. The age should be input in the attendee grouping.

The screenshot shows the 'Attendee' filter section. It includes a list of checkboxes on the left. The first checkbox is checked. To the right of the checkboxes are several filter fields: 'Age' with a dropdown set to 'Less Than' and a text input containing '5'; 'Employment' with a dropdown set to 'Select options'; 'Pregnant' with an unchecked checkbox; 'Parent' with an unchecked checkbox; and 'Smoker' with an unchecked checkbox.

9.4.2 Session

This tab will allow you to specify criteria for any sessions that you have recorded in the system.

The screenshot shows the 'Session' filter section. At the top, there are buttons for 'Manage Saved Lists', 'Clear Filter', 'Apply Individual Filter', and 'Apply Attendance Filter'. Below these are tabs for 'Basic', 'Personal', 'Family' (which is highlighted), 'Location', 'Health', 'Attendances', 'Session', and 'Activity'. The 'Session' tab is active, showing a list of checkboxes on the left. To the right of the checkboxes are several filter fields: 'Session Name' with a text input; 'Comment' with a text input; 'Locations' with a dropdown set to 'Select options'; 'Key Workers' with a dropdown set to 'Select options'; 'Targets' with a dropdown set to 'Select options'; 'Session Aims' with a dropdown set to 'Select options'; 'Service Providers' with a dropdown set to 'Select options'; and 'Every Child Matters' with a dropdown set to 'Select options'. On the right side of the form, there is a vertical list of checkboxes and a button labeled 'CLICK FOR FILTERS'.

Note: If you know the activity type for a specific session then you can specify this in the Activity tab.

9.4.3 Activity

This tab will allow you to specify criteria for any activities that you have recorded in the system.

Manage Saved Lists

Clear Filter

Apply Individual Filter

Apply Attendance Filter

Basic

Personal

Family

Location

Health

Attendances

Session

Activity

Activity

☐

Activity :

Select options

☐

Locations :

Select options

☐

Key Workers :

Select options

☐

Targets :

Select options

☐

Session Aims :

Select options

☐

Service Providers :

Select options

☐

Every Child Matters :

Select options

CLICK FOR FILTERS

9.5. Advanced search examples

Table 1 lists the search parameters that should be used for the example target groups.

Note: after performing every search you should clear filters before performing the next.

Table 1: Advanced Search examples

Data to run	Basic tab	Personal tab	Family tab	Location tab	Apply Individual Filter	Attendances tab	Apply Attendance Filter
Registered BAME under 5s living in deprived LSOAs first registered at your CC	Registered Include Archived	Personal Grouping Registered site = your CC Nationality Grouping Ethnicity – select all except: white English, Irish, other, unknown & did not wish to be recorded	Groups Grouping Aged under 5	Areas Grouping Area = your deprived LSOAs			
BAME under 5s living in deprived LSOAs accessing numbers (registered at your CC)	Registered Include Archived	Personal Grouping Registered site = your CC Nationality Grouping Ethnicity – select all except: white English, Irish, other, unknown & did not wish to be recorded		Areas Grouping Area = your deprived LSOAs		Options Grouping Attendance dates: enter date range Site Attended Grouping Site = your CC Attendee Grouping Age = Less than 5	

Data to run	Basic tab	Personal tab	Family tab	Location tab	Apply Individual Filter	Attendances tab	Apply Attendance Filter
Registered EAL under 5s living in reach (registered anywhere)	Registered Include Archived	Nationality Grouping Language – select all except: English & unknown	Groups Grouping Aged under 5	Areas Grouping Area = all of your LSOAs			
EAL under 5s living in reach accessing your centre (registered anywhere)	Registered Include Archived	Nationality Grouping Language – select all except: English & unknown		Areas Grouping Area = all of your LSOAs		Options Grouping Attendance dates: enter date range Site Attended Grouping Site = your CC Attendee Grouping Age = Less than 5	
Registered lone parents living in reach registered in the locality	Registered Include Archived	Personal Grouping Registered site = your CC plus others in locality	Adult Grouping Lone parent	Areas Grouping Area = all of your LSOAs			
Lone parents living in reach accessing any center in the locality (registered in locality)	Registered Include Archived	Personal Grouping Registered site = your CC plus others in locality	Adult Grouping Lone parent	Areas Grouping Area = all of your LSOAs		Options Grouping Attendance dates: enter date range Site Attended Grouping Site = your CC plus others in locality	