Children's Centre Management Information System; CCM

CCM Superuser Guide



Family Services

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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	All CCM users
CCM Framework and Data Guidance	All CCM users
CCM guide to recording Casework	 Children's centre management team Family support workers CCM superusers

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

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: <u>www.barnet.gov.uk/wwcib/ccm-support</u>

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 if 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:

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Casework			
Reports	Perform Merge		
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Activity Manager	A Merge Duplicates		4
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Report Admin			
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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.

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D.O.8		
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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.

2. 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).

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Barcodes	-								
Resources		_							iii.

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

- 3. Click the '>>Perform Merge<<' button, at the bottom of the screen.
- 4. You will be presented with a merge confirmation box. If you are sure you want to merge the duplicated records then press 'OK'.
- 5. 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:

Family Services

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		CAR0020	Mr Jason Carter	Carter	11	Male		
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	All sessions / activities	CAR0105	Mr Sean Carson	Carson	18	Male		
	PERSONAL DETAILS	JOH0138	Ms Jean Johnson	Johnson	35	Female		
	Registered 🗌 Yes 🖲 🔾 No	JOH0139	J Johnson	Johnson	33	Male		
	Local Yes Ves No	JON0159	Ms Helen Jonson	Jonson	34	Female		
	Mailshots 🔲 Yes 🖲 🔘 No	MON0135	Mr Jason Monk	Monk	29	Male		
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	Category V	SMI0058	Mr Kavan Smith	Smith	13	Male		
	Gender 💙	SMI0188	Miss Rosie Smith	Smith	21	Female		
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If you double-click on a name in the list, you will be taken to that persons 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.



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.

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4.2.2. Session / activity filters

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.

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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.



Activity definitions

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w ode Registers	Individuals = 11 Families = 9	FILTERS: All Attended Healthy, Children an Young People are S Children and Young violence and sexual discrimination. Safe	es only (no Duplicates) ECM = d Young People are Mentaily a exually Healthy, Children and Y People choose not to take life exploitation, Safe from accider from crime and ant social bet etween 02/04/2012 and 30/11	Children and Young F ind Emotionally Health oung People live Hea gal drugs, Safe from n ital injury and death, S awour, Children to ha	People are Physically (ity, Children and ithy Lifestyles, naltreatment, neglect, iale from bullying and we security, stability	Output Options: Correspondee mailin Detailed data extract Attendance	ig list for selectio
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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:

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Locations	Summary	ECM					
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Service Providers	Key Workers	Session Name					
play		90					
Oakleigh Playgroup Playroom (Coppetts Soft Play Room		Ē					
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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 ⑧ Activity definitio	ins
Activity definitions	
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◯ Locations ◯ Key Workers ◯ ECM	
C Aims C Service Providers	
GO	
Health and Safety	^
Information and advice (A)	
Male Carers Groups	=
Maternity Services	-
✓ III →	

4.2.3. 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.

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

Refresh Reset Filters

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:

Children's Centre M	anager	User Name 3 S	ysAdmin Site : Site 1	2			
ME «	ATTENDANCE >> REVIEW						
rch 💁	Review						
endance 🕓	Review	22741-00020000000					
nput ^	Individuals = 21 Families = 17	FILTERS: All Attendee	is only (no Duplicates) AND Be uplicates)	etween 02/04/2012 and 3	0/11/2012	Output Options: O Correspondee mailing	g list for selection
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	From 02/04/2012 To 30/11/2	2012 Identifier					
	SESSIONS / ACTIVITIES	BRI0125	Miss Alison Brice	Brice	19	Female	
		CAR0020	Mr Jason Carter	Carter	11	Male	2
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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.

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	None Sessions Activity definitions	CAR0104	Ms Becky Carson	Carson	40	Female	
	Activity definitions	CAR0105	Mr Sean Carson	Carson	18	Male	
	O No criteria Activities O Targets	JOH0138	Ms Jean Johnson	Johnson	35	Female	
	O Locations O Key Workers O ECM	JOH0139	J Johnson	Johnson	33	Male	
	Aims O Service Providers	JON0159	Ms Helen Jonson	Jonson	34	Female	
		MON0135	Mr Jason Monk	Monk	29	Male	
	GO	500358	Mr Homer Simpson	Simpson	52	Male	
		SAM0162	Miss Jade Samuels	Samuels	15	Female	
~	Aerobica Classes		Mr Alan Wilson	Wilson	45	Male	
	Aerobics Classes	W00353	The Page Triby	Laboration		distant.	
rork 🚺		W00353	THE OWNER THROUGH			10.000	

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:

hildren's Centre M		User Name	SysAdmin Site : Site			_	
117 (SV	ATTENDANCES > REVEN						
h 💁	Review						
dance 🕓							
L ^	Records = 1262, Individuals = 269,	and the second se	es including duplicates AND) Between 03/12/1984 an		tput Options: Correspondee mail	na list for selection
ew	Families = 99, Attendances = 2165	 Attendees (No c Attendees (Sho 				Detailed data extrad	
		O Family attendan			C	Attendance	
ode Registers	k	O No Attendance					
sion Analysis							
	Refresh Reset Filters					OUTPUT	ANALYSE
	Technologies						
	Search						
	Report of the second se						
	TIME FRAME	and the second s	howing first 100 of 1262 Full Name	Surname	Age (at attend		_
	From 03/12/1984 To 06/12/2012	A00482	Monica Adikit	Adika	25	Female	
	SESSIONS / ACTIVITIES	A00482	Monica Adikri	Adikan	25	Female	~
	None O Sessions O Activity definitions	ALL0043	Mandy Allan	Allan	30	Female	
		ALL0043	Mandy Allan	Allan	30	Female	
	All sessions / activities	ALL0043	Mandy Allan	Alan	29	Female	
	PERSONAL DETAILS Registered Yes • No	ALL0043	Mandy Allan	Alan	29	Female	
		ALL0043	Mandy Allan	Allan	29	Female	
	Local Indicator Yes • O No	ALL0043	Mandy Allan	Alan	28	Ferrale	
	Mailshots 🔲 Yes • 💿 No	ALL0043	Mandy Allan	Allan	29	Fernale	
	Photo? Yes No Start date Click To Click	ALL0043	Mandy Allan	Allan	29	Female	
	from Circk I to Circk	ALL0043	Mandy Allan	Allan	29	Fernale	
	DOB from Click To Click	ALL0043	Mandy Allan	Allan	27	Fernale	
	Heading	ALL0043	Mandy Allan	Alan	27	Female	
		ALL0043	Mandy Allan	Altan	27	Female	
			Mandy Allan	Allan	28	Female	
		ALL0043			28	Female	
	Gender	ALL0043 ALL0043	Mandy Allan	Allan	20		
vork b	Gender	and the second se	Mandy Allan Mandy Allan	Alan	28	Female	
	Gender V ADULTS	ALL0043			707.11		

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 ma Detailed data extra	-
🔘 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 reefers 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:

5/12/2012	ites AND Between 03/12/1964 and
Analysis Select options to report	on
Ethnic breakdown	
Families Seen	Pregnant Women

You can choose which summary categories will be included in your report by ticking or deselecting 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:

3 9	110 4	Page 1	✓ of 2	o a 📾 📾	Pdf 👽
Analysis	Repor	t			
				Attendances In Ran	ge
				From 03 Dec 1984	To 06 Dec 2012
	P	regnant Women Seen	Teenage Women Seen	Lone Women Seen	Pregnant women with a disability or special need
Existing	3	0	0	0	0
New		26	2	8	2
Total		26	2	8	2
					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:

	entre Ma	PROPERTY AND INCOME.	THE OWNER WHEN THE OWNER		USE	r Name : Us	er Site : Manage	ment	console	_	_	
OME	41	SLARCH >> HAIL HERI	E DATA EXTRAC									
earch	-	Mail Merge and	Data Extract									
Family People Add Family Wiza Advanced Search Service Providers	h	Records = 308 Famil	des = 97			•	ain filter option between Un-archived families on Un-archived & archived Archived families only	ły		OUTPUT optio Correspon Detailed of Attendanc From date 09	ndee mailing list for lata extract es only	the selection
Mail Merge Data Extract		New List	Add To List	Dele	ete List							OUTPUT
		Output										
		PERSONAL DETA	uls			FILTER		-	Unarchived	_	_	
		Registered		Yes •	O No	Concernant and	of Chaudea Best 10			_		- 12
		Local Indicator		Yes .	No.	Corrent L	st (Showing first 10	0 of 30		1 11 N 1 N 1 N 1 1 T		
		Mailshots		Yes .	No	Identifier	Part Medica	74.54			dividual's Full Detail	5
					-	Cindo Nettoria	Full Name	Age	Full Address	Postcode	Areaname	
		Photo? Start Date	From Click	Yes .	No	PAR0001 PAR0002	Ms Amanda Parrish Mr Shaun Parrish	46	29, Barnside Field, Eastbourne	BC3 6DF BN25 2LL	East Side West Side	-
			To Click			GE00003	Mr Andy George	18	12, King Square, Eastbourne 29, Barnside Field, Eastbourne	BR25 2LL BC3 6DF	East Side	-
		DOS	From Click		_	GE00004	Mr Alan George	10	29, Barnside Field, Eastbourne	BC3 6DF	East Side	-
			To Click		-	GE00005	Mr Colin George	10	29, Barnside Field, Eastbourne	BC3 6DF	East Side	-
		Status Heading	10 CHCK	~	1	FRA0006	Ms Ann-Marie Frank	39	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
		Status Category		v		JON0007	Mr Shaun Jones	37	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
		Gender		~		JONODOB	Miss Ally Jones	16	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
	×	weinzer				JON0009	Miss Tracy Jones	13	14, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
	-	ADULTS				CAR0015	Mrs Karen Carter	50	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
		Parent		Yes .	No No	CAR0016	Mr Bob Carter	64	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
		Teenage Parent		Yes .	No	CAR0017	Mr Joe Carter	20	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	3
		Please note that Teen	age parents are U		140	CAR0018	Mr Jack Carter	19	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	2
		Jama Passak		Yes .	Ma	CAR0019	Miss Vicky Carter	17	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	i.
		Lone Parent		Yes .	No	CAR0020	Mr Jason Carter	11	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	
		Pregnant		Yes .	No	CAR0021	Miss Amarida Carter	13	140, Fieldside View, Eastbourne	BC21 2LZ	Outside SureStart	8
				Vac C	-	ELL0026	Ms Linda Elis	38	36, Barnside Field, Eastbourne	BC3 6DF	East Side	-
				Yes .	No	State (Springer, & Complete Springer, Springe	Miss Sam Ellis	14	36, Barnside Field, Eastbourne	BC3 6DF	East Side	_
		Smoker				FU10027						
		Smoker Employment		~		ELL0027	100000000000000000000000000000000000000	12	35. Barnside Field, Easthourne	803.605	1121/1210121	-
						ELL0028	Ms Sara Ellis	13	36, Barnside Field, Eastbourne	BC3 6DF	East Side	
		Employment CHILD	een an	~	(Kgs)	ELL0028 WIL0029	Ms Sara Ellis Mr John Wide	15	9, Barnside Field, Eastbourne	BC3 6DF	East Side East Side	
		Employment CHILD Birth weight betwee Gestation betwee		ب م	(Kgs) (Wks)	ELL0028 WIL0029 WIL0030	Ms Sara Ells Mr John Wide Mrs Shaun Wide	15 38	9, Barnside Field, Eastbourne 6, Hollow Park, Eastbourne	BC3 6DF BN8 6DF	East Side East Side Outside SureStart	
		Employment CHILD Birth weight betwee	een an	ب م		ELL0028 WIL0029	Ms Sara Ellis Mr John Wide	15	9, Barnside Field, Eastbourne	BC3 6DF	East Side East Side	

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 🔲
- On-archived families only
- O 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 unarchived (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

LOCATED			
Areas: (NB: area sele Attendance')	ctions will be ignored for 'No		
My Areas	Barnfield - E01000125		
Outside	Barnfield - E01000126	L	=
Outside	Barnfield - E01000127		
All Areas	Barnfield - E01000128		
	Barnfield - E01000129		÷
Clear	•	P.	

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

New List	Add To List	Delete List
----------	-------------	-------------

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

		-
New List	Add To List	Delete List
	1	

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

New List	Add To List	Delete List
There energy	Trong the story	a side to write

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

Returned record count

O Archived families only	Records = 307 F	amilies = 97	Retain filter option between selections O Un-archived families only O Un-archived & archived families	
				O Archived families only

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:

	ARCH >> HALL MERGE	DATATX	TRACT									
rch 🤤	Mail Merge and D	ata Ext	ract									
ople dd Family Wizard tvanced Search	Records = 6 Families = 2						sin filter option between se Un-archived families only Un-archived & archived far Archived families only		OUTPUT options Correspondee mailing list for the selection Detailed data extract Attendances only From date (05/06/2012)		selection	
ail Merge ata Extract											ITPUT	
	Output				_			_				
	PERSONAL DETAIL	s	_	_		FILTER	_					
	PERSONAL DETAIL Registered	S		Yes :	No				ved AND in these areas: Old Dock	¢.		
	Transferration of the second second	s		Yes	No		ist (Showing 6 records					
	Registered Local Indicator	s		Yes	No No	Current Li			Double clic	k a row to go to Individ	ual's Full Details	
	Registered Local Indicator Hailsbots	S		Yes ·····	No No No	Current Li Identifier	Full Name) Age	Double cho	k a row lo go lo Individ Postcode	Areaname	
	Registered Local Indicator Hailsbots Photo?			Yes	No No No	Currrent Li Identifier 500052	Full Name Spotty Spock)	Double clic Full Address 10, Saxon Road, Eastbourne	k a row to go to Individ Postcode BN12 8QT	Areaname Old Dock	
	Registered Local Indicator Hailsbots	From		Yes ·····	No No No	Current Li Identifier 500052 8000552	Ful Name Spotty Spock Dr. Lzy Bruce) Age 9	Double clic Full Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	k a row to go to Individ Postcode BN12 8QT BN12 8QT	Areanarpe Old Dock Old Dock	
	Registered Local Indicator Hailshots Photo? Start Date	From C To	C C C C C C C C C C C C C C C C C C C	Yes ·····	No No No	Current Li Ideotfier 500052 8000552 500485	Full Name Spotty Spock Dr. Ley Bruce Dr. Comelius Spock	Age 9 62	Double clic Foll Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 10, Saxon Road, Eastbourne	K a row to go to Individ Postcode BN12 SQT BN12 SQT BN12 SQT	Areanage Old Dock Old Dock Old Dock	
	Registered Local Indicator Hailsbots Photo?	From (To (From (Click Click	Yes ·····	No No No	Current Li Identifier 500052 8000552 500485 8000553	Full Name Spotty Spock Dr. Lity Bruce Dr. Cornelius Spock Master Greg Bruce	Age 9 62 2	Double clic Ful Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	k a row to go to Individ Postcode BN12 SQT BN12 SQT BN12 SQT BN12 SQT	Areaname Old Dock Old Dock Old Dock Old Dock	
	Registered Local Indicator Hailshots Photo? Start Date D08	From (To (From (C C C C C C C C C C C C C C C C C C C	Yes ·····	No No No	Current Li Identifier 500052 8000552 500485 8000553 8000554	Full Name Spotty Spock Dr. Lizy Bruce Dr. Comelius Spock Master Greg Bruce Ms Claire Bruce	Age 9 62 2 7	Double clic Ful Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	K a row to go to Individ Postcode BH12 8QT BH12 8QT BH12 8QT BH12 8QT BH12 8QT	Areaname Old Dock Old Dock Old Dock Old Dock Old Dock Old Dock	
	Registered Local Indicator Halishots Photo? Start Date DOB Status Heading	From (To (From (Click Click	Yes ·····	No No No	Current Li Identifier 500052 8000552 500485 8000553	Full Name Spotty Spock Dr. Lity Bruce Dr. Cornelius Spock Master Greg Bruce	Age 9 62 2	Double clic Ful Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	k a row to go to Individ Postcode BN12 SQT BN12 SQT BN12 SQT BN12 SQT	Areaname Old Dock Old Dock Old Dock Old Dock	
ndance 🚫	Registered Local Indicator Hailshots Photo? Start Date DOB Status Heading Status Category	From (To (From (Click Click	Yes ·····	No No No	Current Li Identifier 500052 8000552 500485 8000553 8000554	Full Name Spotty Spock Dr. Lizy Bruce Dr. Comelius Spock Master Greg Bruce Ms Claire Bruce	Age 9 62 2 7	Double clic Ful Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	K a row to go to Individ Postcode BH12 8QT BH12 8QT BH12 8QT BH12 8QT BH12 8QT	Areaname Old Dock Old Dock Old Dock Old Dock Old Dock Old Dock	
	Registered Local Indicator Halishots Photo? Start Date DOB Status Heading	From (To (From (Click Click	Yes ·····	No No No	Current Li Identifier 500052 8000552 500485 8000553 8000554	Full Name Spotty Spock Dr. Lizy Bruce Dr. Comelius Spock Master Greg Bruce Ms Claire Bruce	Age 9 62 2 7	Double clic Ful Address 10, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne 15, Saxon Road, Eastbourne	K a row to go to Individ Postcode BH12 8QT BH12 8QT BH12 8QT BH12 8QT BH12 8QT	Areaname Old Dock Old Dock Old Dock Old Dock Old Dock Old Dock	

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 Correspondee 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 Correspondee 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 Correspondee Check option in the 'System Admin' menu to help find any families without a Correspondee or those where more than one has been set, either intentionally or by mistake.

Note: The Correspondee 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 of	otions									
Orres	Correspondee mailing list for the selection									
🔘 Detaile	ed data extract									
🔘 Attenda	ances only									
From date	12/12/2013									
		OUTPUT								

The output options are:

1. Correspondee 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.

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.

hildViev		User Name - SysAdmin Site - Site 1	?
OME	ATTENDANCE REVIEW >> OUTPUT		
earch	Attendance Review Output		
tendance			
Input		PDF CSV DOC PP PB CSV DOC or	-
Review	A.Z	clear to select an records	Lega
Barcode Registers		Clear	
	Preview Data		
	Click to p	review the results or select an output format from the above	options.
	2		
	<u> </u>		
ework	0		
oorts	*		
	4		
ssaging	<u>.</u>		

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:

🖬 Title	~
S Forename	
MiddleName	
Sumame	
🗌 KnownAs	
Identifier	
NHNumber	
2 DOB	
Postcode	
🗌 Tel	×
Clear All	Select All



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.

Grouping			8
Members: Select All UnSelect	All	Groups to Add To:	
 Adam Bryant (DOB: 08 Feb 1989) Alan George (DOB: 22 Oct 1996) Alan Wilson (DOB: 12 Aug 1968) Alan Wilson (DOB: 12 Aug 1968) Alan Wilson (DOB: 12 Aug 1968) Alce Courter (DOB: 17 Oct 2003) Alce Martin (DOB: 09 Feb 2000) Alson Brice (DOB: 24 Mar 1994) Aly Jones (DOB: 14 May 1997) Amanda Lancer (DOB: 30 Oct 1999) Armanda Parrish (DOB: 07 Aug 1967) Andy George (DOB: 17 Sep 1995) April Wantage (DOB: 24 May 2009) 		Group	Search
Beata Zoboranov (DOB: 01 Jan 2008)	3	4	~
Add To Group/s Add To Group/s (delete current)		
Create Group			



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.



	Enter the number of records to	
	export here 500	or
	clear to select all records	
Draview the date	Clear	
- Preview the data		

- 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).

HOME #	ATTEN	DANCE REV	IEW >> OUTPUT	ř								
Search 💁			Review Out									
Attendance 🕓	Aut	muance	Keview Out	pur			1					
D Input	źź			L.	A	ò 🏑			number of record			
Review			AZ	PDF	CSV D			export he clear to t	select all records	or		Legis
Barcode Registers								Clev	w			
	Pre	view Dat	a									
		Title	Forename	Sumame	Identifier	DOB	Postcode	HouseNumber	HouseName	StreetName	Address2	TownHame
	1		Alan	Wilson	F00434	12/08/1968	BN5 6TF	65		Ash Park		Eastbourne
	2		Amanda	Lancer	LAN0175	30/10/1999	BN17 5TH	.44		Sycamore Park		Eastbourne
	3		Ben	Wilson	W00471	01/03/2005	BN5 6TF	6		Ash Park		Eastbourne
	4		Harry	Smith	S00372	03/03/2005	BN9 9YY	10		Parfield Close		Eastbourne
	5		Harry	Smith	S00435	02/04/2000	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	BN8 98P	11		North Park		Eastbourne
	8		Nathan	Blake	B000491	02/05/2006	BC3 6DF	15		Anyroad		Eastbourne
	9		William	Blake	B000492	01/05/2006	BC3 6DF	15		Anyroad		Eastbourne
	1(Master	Henry	Martin	M000512	27/04/2010 00:00:00	BN9 9YY	5		Partield Close		Eastbourne
	1	t Master	Peter	Price	P000543	11/11/2007	BN12 3CV	105		Mallard Road		Eastbourne
Casework d	•											8
Reports 🔒												
Messaging 🤞	All statements											
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 Children's Centre M	fanager		User Name :	User Site : Site 1				? ×
IOME 44	ATTENDANCE >> SESSION AN	AL 4515						
earch 🔍								
ttendance 🕓								
Input	Session filters fields	From 18 Dec 2013 💟	Activities	States	Cancelled (REFRESH	
Review		To 31 Dec 2013 💟				+ Activities	KErkeon	
Barcode Registers							- Show/Hid	le Help Information -
Session Analysis								
sework								
sework								
sework 🔒								
ework								

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.

OME	estre Har	ATTENDANCE >> DETERMANAL POP				SysAdmin				
parch .	0									
tlendance	0	SESSION ANALYSIS								
		Fem	m 01 Dec 20	-						
Input	1	Session filters fields			Activities	isses; Bun 🖬	des	Cancel	ed Categories	REFRESH
Review Barcode Registe				and the state					· · · · · · · · · · · · · · · · · · ·	
Session Analysi										- ShowHide Help Informat
oesanan renaryan	-									
		- Search Criteria - Session Date of or after : 01 Session Date before or on : Activities : Aerobics Casses; Bi Skop; Junior Library; Modeling; M Singing Lessons; Tea & Toarbie Activity State : Active Only	31 Jan 2014; imps & Babies lum's The Wo	ord; Music Clas	g Network; Crei ses; Neighbour	che Club; Drop-3 hood Nursery; N	n Inn; Fathi umeracy; P	ers' Days; Food for Tay & Learn; Play an	Life: Go-Karting For Dads: Home Wats d hear: Play and Stay; Post-Natal Grow	h; Indoor Football; Jump & .p; Reading Skills; Reef Day;
		Summary Sessions Book	ings Atter	ndances K	Ley Workers	Booked Not	Attended	Attended Not	Booked	
		S mission secon		10000	0000-000	0.050.060.065				
		Summary							- Show	Hide Help Information -
			-		1					
		FROM > 01 Dec 2013	T0 > 31 Ja	in 2014		Fiumper or pes	sions for pr	eriod selected : 13	Number of Sessions Selected 7	Selected as % : 53.85
		Number of Bookings : 21]				Number of Bookings (Not	Attended): 15
					1					
		Number of Altendances :	33		l				Number of Attendances ()	lot Booked): 13
		Status	To	ut Tot	al Total	dances Perc	in i			
			Sec.	and below the party of	States and Supposed	Annual States	_			
		Confirmed Booking	7	21	33	53.8 38.4	_			
		Cancelled	1	0	0	7.69		_		
	~		_	-	-	-	_			
		Cancelled Categorie	n To	tal Tot ssions Boo	al Total okines Atten	Perc	Inoc			
	- 1	Venue not available	1	0	0	7.69		_		
		Cancelled Reasons	10		al Total	Perc	-			i
		Cancesing Reasons	Se	tal Tot ssions Bior	al Total skings Amer	dances		-		
		Centre Closed	1	0	0	7.69				
		Activity	Total	Total	Total	Booked	Attende	d Session		
			Session	Booking	s Attendanc	es Not Attended	Not Booked	Percent		
		Aerobics Classes	1	4	3	1	0	7.69		
		Food for Life	2	0	0	0	0	15.38		
		Singing Lessons	1	3	0	3	0	7.69		
		Childminding Network	1	5	0	5	0	7.69		
		Creche Club	1	5	5	0	0	7.69	6	
		Play and Stay	5	18	16	6	4	38.46		
		Bumps & Babies	1	0	5	0	5	7.69		
	×	Fathers' Days	1	0	4	0	4	7.69		
asework	0	CSV Print								
eports	1									

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:

ME «	tanager.	COLUMN TWO IS NOT		User Name : SysAd	min Sale 7 Site	1	_		_	
	- Contractory Contra	>> SESSION ANA	2.9525							
earch	SESSION	ANALYSIS								
ttendance 🕓	R									
Input ^	Session filte	ers fields	From 01 Dec 2013 👻	Activities	States	Ca	ncelled Cat	egories	00	FRESH
Review			To 31 Jan 2014 🖂	Food for Life; Play a	an 🖬			🖬 + Activiti	es 🗹 🔣	ricon
Barcode Registers									54	- Show/Hide Help Ir
Session Analysis	-									
	Session Da Activities	ate on or after								
	Lunio			I man and a second						
	Summary	aessions 8	Bookings Attendances	Key Workers Book	ed NOT Attended	Attended	NOT BOOK	80		
	Sessio	uns 11.	um (defaulte to E00)		CSV				- Show Add	de Help Informati
		Maxim	num (defaults to 500) :	Reload	CSV				SILVINI	de nep monia
					16 ⁻¹¹				<i>1</i>	
	Selo	ct Session			Date	Start	Stop	Location	Bookings	Attended
		Play and S	Stay (Community Centre)		20/12/2013			Community Centre	6	0
		Food for Life	fe (Clients Home)		19/12/2013			Clients Home	0	0
		Play and S	Stay (Community Centre)		19/12/2013		1	Community Centre	0	0
		Play and S	Stay (Community Centre)		18/12/2013			Community Centre	6	6
			i le (Glienta Home)		17/12/2013			Gliento Home	θ	θ
			Stay (Community Centre)		13/12/2013			Community Centre		4
		Play and S	Stay (Community Centre)		11/12/2013			Community Centre	6	6

<u>Styles Key (Grid Row Style Session Status - Click to Expand):</u> 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)
Gancelled : (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.

The Children's Centre	e Manager				User Name : SysAdmin S	Site 1				?
HOME	-	DANCE >> MESSION AN	ALYSIS							
	SES	SION ANALYSIS	Ĩ							
) Input	^ Sessie	on filters fields		01 Dec 2013 🖂		ites	Cancelled Cat		REFRESH	
Review			To	31 Jan 2014 🖂	Food for Life; Play an			+ Activities 🗹		
Barcode Registers	-								- Show/Hi	ide Help Informatio
Session Analysis	17									
			-		Key Workers Booked Not A	Attended Atte	nded Not Booke	d		
		Bookings (for	Selected					- S	how/Hide Help	Information -
		Bookings (for	Selected	Address	2		DOB	- S Tel.	how/Hide Help Mobile	Information -
		Process land		Address	Lane Eastbourne BN23 9TR (Ea	ist Side)	DOB 01/01/2008		li.	Information -
		Name	Zoborano	Address v 45 Noah 8 Eagle (Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nor	th Side)	Discrete Contract		li.	Information -
		Name Miss Beata Miss Gertru Master Gord	Zoborano Ide Crewe don Le-mo	Address v 45 Noah 8 Eagle i on 4 Harlow	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nor Park Eastbourne BN7 5SM (We	th Side) est Side)	01/01/2008 28/05/2007 22/10/2008		li.	Information -
		Name Miss Beata Miss Gertru	Zoborano Ide Crewe don Le-mo	Address v 45 Noah 8 Eagle i on 4 Harlow	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nor Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo	th Side) est Side)	01/01/2008 28/05/2007		li.	Information -
		Name Miss Beata Miss Gertru Master Gord	Zoborano ide Crewe don Le-mo er Gander	Address v 45 Noah 8 Eagle i on 4 Harlow 49 Norm (North Si	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nor Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo	th Side) est Side) purne BN10 9LJ	01/01/2008 28/05/2007 22/10/2008		li.	Information -
		Name Miss Beata Miss Gertru Master Gor Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle i on 4 Harlow 49 Norm (North Si 5 Green	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008		li.	Information -
		Name Miss Beata Miss Gertru Master Gori Miss Jennife Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle (on 4 Harlow 49 Norm (North S) 5 Green 49 Norm	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008		li.	Information -
	v	Name Miss Beata Miss Gertru Master Gori Miss Jennife Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle (on 4 Harlow 49 Norm (North S) 5 Green 49 Norm	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008		li.	Information -
Casework	×	Name Miss Beata Miss Gertru Master Gori Miss Jennife Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle (on 4 Harlow 49 Norm (North S) 5 Green 49 Norm	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008		li.	Information -
77777555564		Name Miss Beata Miss Gertru Master Gori Miss Jennife Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle (on 4 Harlow 49 Norm (North S) 5 Green 49 Norm	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008		li.	Information -
	v 0	Name Miss Beata Miss Gertru Master Gori Miss Jennife Miss Jennife	Zoborano ide Crewe don Le-mo er Gander fuir	Address v 45 Noah 8 Eagle (on 4 Harlow 49 Norm (North S) 5 Green 49 Norm	Lane Eastbourne BN23 9TR (Ea Court Eastbourne BC3 6DF (Nort Park Eastbourne BN7 5SM (We an Road Treetops Estate Eastbo de) Road Eastbourne BB2 5RF (Soc an Road Treetops Estate Eastbo	th Side) est Side) ourne BN10 9LJ uth Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008		li.	Information -

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.

uildren's Centre Ma	nager				User Name : SysAdm	in Site : Site 1				100
E 44	ATTENDANCE	>> SESSION AND	ALYSIS							
9	SESSION	ANALYSIS								
ance 🕓	and the second se	Contrast of the second s		_						
~	Session filt	ters fields	From	01 Dec 2013 🖳	Activities	States	Cancelled Ca	tegories	DEFENSION	
w			To	31 Jan 2014 🖂	Food for Life; Play an	2		🚽 + Activities 🗹	REFRESH	
de Registers									- Show/H	lide Help Informati
ion Analysis										
	Session D Activities	Date on or afte Date before or s : Food for Life; State : Active O	on: 31 . Play and	Jan 2014;						
	Summary	Sessions	Booking	s Attendances	Key Workers Booked	Not Attended At	tended Not Book	ed		
	Atter	ndees (for						- 5	how/Hide Heip	Information -
	Atter	ndees (for	r Selecto	d Sessions)				- S	how/Hide Help	Information -
	Atte	ndees (tor	r Selecte	d Sessions)	55		DOB	- S	<i>how/Hide Heip</i> Mobile	Information -
	Atte	T.		Addre	ss Ih Lane Eastbourne BN23 91	TR (East Side)	DOB 01/01/2008			Information -
	Atte	Name	Zoborano	Addre v 45 Noa	TRANS		a more con			Information -
	Atte	Name Miss Beata 2	Zoborano de Crewe	Addre v 45 Nos 8 Eagl	h Lane Eastbourne BN23 91	F (North Side)	01/01/2008			Information -
		Name Miss Beata 2 Miss Gertrud	Zoborano de Crewe Ion Le-ma	v 45 Noa 8 Eagl on 4 Hark	nh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate B	F (North Side) M (West Side)	01/01/2008 28/05/2007			Information -
		Name Miss Beata 2 Miss Gertrud Master Gordi Miss Jennifer	Zoborano de Crewe lon Le-mo er Gander	Addre v 45 Not 8 Eagl an 4 Hark 49 Nor (North	nh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate B	F (North Side) M (West Side) Eastbourne BN10 9LJ	01/01/2008 28/05/2007 22/10/2008			Information -
		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addree w 45 Not 8 Eagl on 4 Hark 49 Nor (North 5 Gree	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008			Information -
		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addre v 45 No 8 Eagl an 4 Hark (North 5 Gree 49 Nor	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008			Information -
		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addre v 45 No 8 Eagl an 4 Hark (North 5 Gree 49 Nor	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008			Information -
		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addre v 45 No 8 Eagl an 4 Hark (North 5 Gree 49 Nor	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008			Information -
ork 💧		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addre v 45 No 8 Eagl an 4 Hark (North 5 Gree 49 Nor	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008			Information -
ork io s ii jing 🛁		Name Miss Beata 2 Miss Gertrud Master Gord Miss Jennifer Mis Paula Mu	Zoborano de Crewe Ion Le-me r Gander uir	Addre v 45 No 8 Eagl an 4 Hark (North 5 Gree 49 Nor	wh Lane Eastbourne BN23 91 e Court Eastbourne BC3 6Df w Park Eastbourne BN7 5S man Road Treetops Estate f Side) n Road Eastbourne BB2 5R man Road Treetops Estate f	F (North Side) M (West Side) Eastbourne BN10 9LJ F (South Side)	01/01/2008 28/05/2007 22/10/2008 27/07/2008 03/02/2008			Information -

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.

Children's Centre M	lanager			User Name : Sy:	and the second se	Terraria da			
ME 📢	ATTERD	MICE >> SESSION A	HALVILE						
rch 💁	SESS	ION ANALYSIS							
ndance 🕓									_
out ^	Session	ı filters fields	From 01 Dec 20	13 Activities	States	Cancelled	Categories		
view			To 31 Jan 201	Food for Life; P	lay an 🖬		🖬 + Act	Mities	
rcode Registers								- ShowHide	e Help Information
ssion Analysis									
		ch Criteria -	bar + 01 Day 2012						
	Sessio		ter: 01 Dec 2013; r on: 31 Jan 2014;						
	Activi	ity State : Active	Only						
	Summ	ary Sessions	Bookings Atten	dances Key Workers Bo	ooked Not Attended	Attended Not Bo	ked		
							263-0		1
	ĸ	ey Workers	(for Selected Sess	ions)					1
	к	ey Workers	(for Selected Sess	ions)				- Show/Hide Help In	formation -
	K								oformation -
	×	Key Worke	bf	Address		Tel	Mobile	Email	<u>^</u>
	ĸ		bf		ourneBN10 9FF	Tel 0115 6789	5- 07941-		<u>^</u>
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	ĸ	Key Worke	DF 8	Address	ourneBN10 9FF	0115	5- 07941-	Email	<u>^</u>
		Key Worke	DF 8	Address	ourneBN10 9FF	0115	5- 07941-	Email	<u>^</u>
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		Key Worke	DF 8	Address	ourneBN10 9FF	0115	5- 07941-	Email	<u>^</u>
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		Key Worke	DF 8	Address	ourreBN10 9FF	0115	5- 07941-	Email	<u>^</u>

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.

ChildVie The Children's Cer			1923		110/0 41	ame : SysAdmin Site : Si	1	? >
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			Books	ed Not Attended (Active Session	Sessions) (for S	elected Sessions)	- Sh Address	ow/Hide Help Information -
			Booke	Session Play and Stay (Community	Date			<u>_</u>
			Book	Session	Date 20 Dec 2013	Name	Address	le)
				Session Play and Stay (Community Centre) Play and Stay (Community	Date 20 Dec 2013 20 Dec 2013	Name Miss Beata Zoboranov	Address 45 Noah Lane Eastbourne BN23 9TR (East Sid	le)
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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.

hildVie Children's Ce		nager			Unite N	ame : SysAdmin Site : S	ite 1	?
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earch tendance		SESS	ION ANALYSIS					
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larcode Register								- ShowHide Help Informatio
		_				orkers Booked Not Attende		
		1	ttended Not Bo	oked (Active Se	essions) (for Si	elected Sessions)	- St	now/Hide Help Information -
			Session	oked (Active Se	essions) (for Si Date	Name	- St Address	now/Hide Help Information -
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			Session Play and St Centre)		Date	Name	Address	de)
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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.

Parameters & Designs	
Please Select Site	
Please Enter Start Date	
Please Enter End Date	
Compare with the past period start	
Designs exist for the selected report. In o Design Options	order to use one of these, select one from the 'Design Options' list below : (none selected)
	Toggle View SQL 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:

ChildVie The Children's Ce		6		Uşar	Name : Use	r	Site : Mar	nager	nent Cor	sole				?
MAIN MENU	+ REPO	RT SELECTOR >>	REPORT CONS	OLE >> REPORT I	REVIEW									
Search	9													
Attendance	0	PORT NAME : TEST	REPORT DESCRIP	TION TEST REPO										
Casework	h													
Reports	1	ORTS >> PREVIEW												
reporta	R	eport Preview												
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												7 72	8	
	-	A state and the Table	MONTH .		FORENAME	(A)	-							
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		2		and the second s		9	terror to	Ÿ		\$	And a second sec	1		
		46	01/10/2012	CAR0020	Jason		Carter		9		Bumps & Babies			
		46	01/10/2012	CAR0105	Sean		Carson		16		Bumps & Babies			
		46	01/10/2012 01/10/2012	BRJ0125 500460	Alson Harry		Brice Smith		18 10		Bumps & Babies Aerobics Classes			
		22 22	01/10/2012	500400	Harry		Smith		12		Aerobics Classes			
		22	01/10/2012	S00435 S00372	Harry		Smith		7		Aerobics Classes			
		22	01/10/2012	SM10058	Kavan		Smith		12		Aerobics Classes			
		22	01/10/2012	SMI0188	Rosie		Smith		19		Aerobics Classes			
		46	01/10/2012	SAM0162	Jade		Samuels		14		Bumps & Bables			
		26	12/11/2012	GE00003	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)	terns)	>										
	1.0					_		_		_				
	187													
System Admin	3													
Site Admin	•													

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

Report template view:

Barnfie A1 - No. of families registered/a Centre	affiliated with the (Children's		
Run for the Period :	01 Apr 2014	to	20 Jun 2014	
Compared with :	01 Jan 2014	to	20 Mar 2014	
Total number of families				
	Families Seen Th	is Period	207	
	Percentage D	ifference	16.29%	
Number of families that live in t	the children's cent	re reach a	area	
	Families Seen Th	is Period	99	
	Percentage D	ifference	2.06%	
				-
Number of families that live in	Barnet (i.e. anywhe	ere but in	the reach area)	
	Families Seen Th	is Period	63	
	Percentage D	ifference	34.04%	
				-
Number of families that live ou	t of borough			
	Families Seen Th	is Period	45	
	Percentage D	ifference	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:

MAIN MENU 😽		IS NO REPORT FORMER		
Search 💁				
Attendance 🕓				
Casework o				
Reports				
Reports				
Reports				
Old Reports				
C 64 2977 AU 87				
	ACTIVITYID E MONTH	IDENTIFIER FORENAI Select Fields	STYNAME STENAME	
	0 00	A REAL PROPERTY AND A REAL PROPERTY A REAL PROPERTY A REAL PROPERTY AND A REAL PROPERT		
	45 01/10/2012	CAR0020 Jason MONTH	Babies Ste 1	
	46 01/10/2012	CAROLOS Sean DIDENTIFIER	& Bables Site 1	
	45 01/10/2012	REIDI 25 Alkon	B Babies Site 1	
	22 01/10/2012	S00460 Harry FORENAME	Chuses Site 1	
	22 01/10/2012	S00435 Harry SURNAME	a Classes Ste 1	
	22 01/10/2012	S00372 Hany AT_AGE	a Chapes Site 1	
	22 01/10/2012	SH10056 Kavan ACTIVITYNAME	& Classes Site 1	
	22 01/10/2012	SMI0188 Rose SITENAME	Classes Site 1	
	46 01/10/2012	SAM0162 Jade	& Bables Site 1	
	26 12/11/2012	GED0003 Andy	r Life Site 1	
	26 12/11/2012	PAR0002 Shaun	tife Stell	
	26 12/11/2012	JON0009 Tracy Clear AI	Select AI	
	5		2	

Tick the fields you want to include and un-tick the fields you don't want. Once you have made

your selection click the **screen**.

The result grid will update accordingly.

Exporting the results

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

MATTER CONTRACTOR	REPORT SELECTOR >>	REPORT CONS	ROLE >> REPORT	REVIEW										
arch 🔒	HEPORT HAME TEST	REPORT	INTON TEST REPO	RT.										
endance 🕓														
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Id Reports	617 H								-	10		-	-	
										-	2			
	ACTIVITYID	MONTH	IDENTIFIER	FORENAME	SURNAME		AT_AGE		ACTIVITYNAME	CIT	Extract	the Dat	a)	
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	46	01/10/2012 01/10/2012	CAR0020 CAR0105	Jason Sean	Carter Carson		9 16		Bumps & Babies Bumps & Babies		R	RTF		
	40	01/10/2012	BR10125	Alson	Brice		18		Bumps & Bables	11000			· •	
	22	01/10/2012	S00460	Harry	Smith		10		Aerobics Classes		2	XLS		
	22	01/10/2012	500435	Harry	Smith		12		Aerobics Classes	1000	2	XML		
	22	01/10/2012	500372	Напту	Smith		7		Aerobics Classes	1000		TUTE	_	
	22	01/10/2012	SM10058	Kavan	Smith		12		Aerobics Classes	Contraction of the local division of the loc				
	22	01/10/2012	SMI0188	Rosie	Smith		19		Aerobics Classes	Site 1	1			
	46	01/10/2012	SAM0162	Jade	Samuels		14		Bumps & Babies	Site	1			
	26	12/11/2012	GE00003	Andy	George		17		Food for Life	Site	1			
	26	12/11/2012	PAR0002	Shaun	Parrish		23		Food for Life	Ste 1	1			
	26	12/11/2012	30N0009	Tracy	Jones		12		Food for Life	Site 1	1			
	<													
	Page 1 of 1 (12)	items) 🚺 🚺	S.											

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:

HOME 😽 🕌	Ivanced Search	
Search 💁	Filter Text	0
Family People Add Family Wizard	Manage Saved Lists Clear Filter Apply Individual Filter Apply Attendance Filter Basic Penami Fanky Basic Keetin	•
Advanced Search	Basic Search Filter	
Service Providers	Name: Smith	
Mail Merge Data Extract	Address	CLICK ION INTERS
ttendance 🕓 asework 👍		
eports		
Aessaging		

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:

HOME *	Advanced Search	User Name 1 SysAdmin Site							
Search 🔍	Filter Text								0
	Search Results Peop	le							•
Family	Name C		ostcode	Identifier	Telephone	DoB	Age	Gender	
People	Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S BN		500372	+	03/03/2005	8	Male	
Add Family Wizard	Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East SidBC		500435	-	02/04/2000	13	Male	
Advanced Search	Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side) BN	5 6TF	500460	-	12/05/2002	11	Male	
Service Providers	Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East SidBC	3 6DF	SMI0190	*	29/07/2000	12	Female	
Mail Merne	Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid BC	3 6DF	SMI0189	-	30/03/1995	18	Female	
Mail Merge Data Extract	Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East SidBC	3 6DF	SMI0188	T	19/10/1992	28	Female	
	Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East SBN	31 6DM	SMI0093	01253 223344	24/01/1971	42	Female	
	Mr Chris Smith	11 Duck Park Eastbourne BB2 SRF (West Side) BB3	2 SRF	SMI0057	01253 223344	13/02/1970	43	Male	
	Mr Dean Smith	11 Duck Park Eastbourne BB2 SRF (West Side) BB	2 SRF	SMI0059	•	08/03/1995	18	Male	
	Mr Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB	2 SRF	SMI0058		11/01/2000	13	Male	
	Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East SidBC	3 6DF	SMI0187	01234 765234	01/09/1982	30	Male	
	in rou onnut	a second s							
	Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East SidBC		SMI0186	01253 223344	08/11/1966	46	Female	1
	(0)			SMI0186	01253 223344		46	Female	1
	(0)			SMI0186	01253 223344		46	Female	1
asework 🦲	(0)			SMI0186	01253 223344		46	Female	1
	(0)			SMI0186	01253 223344		46	Female	

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:

Apply Attendance	e Filter	
Attendances	Session	Activity

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:

You currently have 94194 individuals selected I Please use the Individual Filter options to reduce this selection to less than 15000 before clicking Apply Attendance Filter	
	0

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

Save Search	h Criteria	
Name:		(required) Comment
		~
		Copy Filter Text

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 Searc	th Criteria
vame:	Smiths in Site 1 (24May2013) (required) Comment
deceased	ed by site, no archived address, no person, DisplayName:'Smith', Areaid in ,5,6,7,]
	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:

Created.	28 May 2013 16:57:49	
Name:	Smiths in site 1 (24May2013)	
	Restricted by site, no archived address, no deceased person, DisplayName:'Smith', Areaid in [1,2,3,4,5,6,7,]	1
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.

Load List	Sive Litt	
Load Saved Li	st	
Smiths in site	1 (24May2013)	
Created:	28 May 2013 16:57:49	
∉ame:	Smiths in site 1 (24May2013)	
	Restricted by site, no archived address, no deceased person, DisplayName:'Smith', Areaid in [1,2,3,4,5,6,7,]	
Comment.	ý.	
1 10	Delete Second List	
Load Save	Delete Saved 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:

Filter Text	0
Restricted by site, no archived address, no deceased person. DisplayName:Smith', Areaid in [1,2,3,4,5,6,7,]	

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:

HOME #	Advanced Search							
Search 🔍	Filter Text							0
Family	Search Results Peop							•
	Name 🌣		Postcode	Identifier	Telephone	DoB	Age	Gender
People	Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S BI		S00372	•	03/03/2005	8	Male
Add Family Wizard	Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East SidBo		500435	-	02/04/2000	13	Male
Advanced Search	Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side) BI		500460		12/05/2002	11	Male
Service Providers	Miss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East SidB)		SMI0190	1. Ale	29/07/2000	12	Female
Mail Merge Data Extract	Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid Bo		SMI0189	•	30/03/1995	18	Female
Data Extract	Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East SidBo		SMI0188	There are a second	19/10/1992	20	Female
	Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East 18)		SMI0093	01253 223344	24/01/1971	42	Female
	Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB		SMI0057	01253 223344	13/02/1970	43	Male
	Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side) BB		SMI0059	•	08/03/1995	18	Male
	Mr Kavan Smith	11 Duck Park Eastbourne BB2 SRF (West Side) BB	B2 SRF	SMI0058		11/01/2000	13	Male
	Mr Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid Bo	C3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
	Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East SidB)	C3 6DF	SMI0186	01253 223344	08/11/1966	46	Female
	2							
	A FILTERS							
Attendance 🧿	A FILTERS							
Attendance O	A FILTERS							
	A FILTERS	Page [1						ew 1 - 12 of 12

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:

Name 🌣	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S	BN9 9YY	S00372	20	03/03/2005	8	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	500435	-	02/04/2000	13	Male
Harry Smith	47 Ash Park Eastbourne BNS 6TF (South Side)	BN5 6TF	S00460	2/	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 1	BN31 6DM	SMI0093	01253 223344	24/01/1971	42	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 SRF	SMI0057	01253 223344	13/02/1970	43	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 SRF	SMI0059	•	08/03/1995	18	Male
Mr Kavan Smith	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 5RF	SM10058	•	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 Gave Smith	34 Barnside Field Eastbourne BC3 6DF (East Sid	BC3 6DF	SMI0186	01253 223344	08/11/1966	46	Female
	36 Fieldside View Eastbourne BC21 2LZ (Outsid	BC23 212	\$00352	-	02/06/1973	39	Male

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 Peop Name	Address	Postcode	Identifier	Telephone	DoB	Age	Gender
Bella Smith	20 Barnside Field Eastbourne BC3 6DF (East	BC3 6DF	SMI0081	+	15/07/1991	21	Female
Frank Smith	5 Ash Park Eastbourne BNS 6TF (South Side	BNS 6TF	S00382		02/05/2002	10	Male
Harry Smith	10 Parfield Close Eastbourne BN9 9YY (South S	BN9 9YY	S00372	*	03/03/2005	7	Male
Harry Smith	23 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	S00435	-	02/04/2000	12	Male
Harry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	5.	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 Si	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0189		30/03/1995	17	Female
Miss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0188	+	19/10/1992	19	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Mr Chris Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	882 SRF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 SRF	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 Si	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female
Mrs Julie Smith	20 Barnside Field Eastbourne BC3 6DF (East	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.

Filter Text				
Search Results People				
Search Results Attendance (no duplicates) - D	efault time period is the last 180 days			
Name	Identifier 0	Aqe	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	

2. 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.

Name	Address	Postcode	Identifier (Telephone	DoB	Age	Gende
Aiss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0189	*	30/03/1995	17	Female
Miss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Ar Chris Smith	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 SRF	SMI0057	01253 223344	13/02/1970	42	Male
Ar Dean Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 5RF	SMI0059	-	08/03/1995	17	Male
Ar Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0186	01253 223344	08/11/1966	45	Female

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

Address 0	Postcode	Correspondee
10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	Dawn Parker
11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 SRF	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:

childView	lanager	Iser Site : Site 1		,
IN MENU 😽	Advanced Search			
arch 💁	Filter Text			-121
6	Search Results People			•
amily	Search Results Attendance (no duplicates) - Default time p	period is the last 180 days		•
People	Search Results No Attendance			•
dd Family Wizard	Search Results Family Attendance			
dvanced Search	Address ©	Postcode	Correspondee	-
ervice Providers	10 Parfield Close Eastbourne BN9 9YY (South Side)	BN9 9YY	Dawn Parker	
	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 SRF	Ms Tracey James	
ail Merge/Data xtract	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		
	LOCK FORM FILTER			
	ok fool faltees			
	or foor entrees			I
	or foor pitters			I
	CK FOR FLITTERS			
×.	or foot entres			
andance Q				
ndance 🚫				
ework 🚺				

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 1	BN9 9YY	S00372	-	03/03/2005	7	Male
larry Smith	23 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	S00435	-	02/04/2000	12	Male
larry Smith	47 Ash Park Eastbourne BN5 6TF (South Side)	BN5 6TF	S00460	-	12/05/2002	10	Male
Aiss Ann Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0190	-	29/07/2000	12	Female
Miss June Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Aiss Rosie Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0188	-	19/10/1992	19	Female
Aiss Wendy Smith	40 St Marks Road Eastbourne BN31 6DM (East	BN31 6DM	SMI0093	01253 223344	24/01/1971	41	Female
Ar Chris Smith	11 Duck Park Eastbourne BB2 SRF (West Side)	BB2 SRF	SMI0057	01253 223344	13/02/1970	42	Male
Ar Dean Smith	11 Duck Park Eastbourne 882 5RF (West Side)	882 SRF	SMI0059	•	08/03/1995	17	Male
Ar Kavan Smith	11 Duck Park Eastbourne BB2 5RF (West Side)	BB2 SRF	SMI0058	-	11/01/2000	12	Male
Ar Paul Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Ars Gave Smith	34 Barnside Field Eastbourne BC3 6DF (East Si	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	d Close Eastbourne BN9 9YY	(South	BN9 9YY	S00372	-	03/03/2005	7	Male
Harry Smith	23 Barnsid	de Field Eastbourne BC3 6DF	East S	BC3 6DF	S00435	-	02/04/2000	12	Male
Harry Smith	47 Ash 💁	Tariffering DNS ATE /Sh	the Side)	BN5 6TF	500460	-	12/05/2002	10	Male
Miss Ann Smith	34 Barn	Full Details	st S	BC3 6DF	SMI0190		29/07/2000	12	Female
Miss June Smith	34 Barn	Family Support workers	st S	BC3 6DF	SMI0189	-	30/03/1995	17	Female
Aiss Rosie Smith	34 Barn	Family Indicators	st S	BC3 6DF	SMI0188		19/10/1992	19	Female
Miss Wendy Smith	40 St M	View Reports	East	BN31 6DM	SM10093	01253 223344	24/01/1971	41	Female
Ar Chris Smith	11 Duck	Export List as XML	side)	BB2 5RF	SMI0057	01253 223344	13/02/1970	42	Male
Mr Dean Smith	11 Duck	Export List as CSV	Side)	BB2 SRF	SMI0059	-	08/03/1995	17	Male
Ar Kavan Smith	11 Duck	Export List as CTF Choose Columns	side)	BB2 5RF	SMI0058	-	11/01/2000	12	Male
Ar Paul Smith	34 Barn	Choose Columns	Least S	BC3 6DF	SMI0187	01234 765234	01/09/1982	30	Male
Mrs Gaye Smith	34 Barnsid	de Field Eastbourne BC3 6DF	East S	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 Pe	eople	
Name 🚖	+ +	Address
Harry Smith	39 Barns	ide 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'.

ChildView The Children's Centre Man			User Name : Use	r Site : Site 1		×
MAAN MENO 4	dvanced Search					
Search	Filter Text					
Family	Manage Saved Lists	Clear Filter	Apply Individual Filte	r Apply Attendance Filter		¥
People	Basic	sonal Family	- toration Health	Alternet Server	1.000	
Add Family Wizard	Basic Search	Chur				
Advanced Search						
Service Providers		150.0050	Smith			
Mail Merge/Data Extract		Address : Identifier :				
		NH Number :				
		Tel				
		Mobile :				
		D.O.B.				
		Registered :			of the second	
		Notes :				
		Include Archived :				
Attendance 🕓						
Casework 0						
Reports						
System Admin	0002					×
© Copyright 2012 CACI. All right res	anad					

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:

	dvanced Sear	cn						
Search 💁	Filter Text							
Family	Manage Saved Lis	sts Clear Filter	1 4	pply Individual Filt	ter Apply Atter	dance Filter		0
People		Personal Family	Locate	Healt	h linear			
Add Family Wizard	-				01			
Advanced Search	Health			-		-		
Service Providers		Smoker :	F					
Mail Merge/Data Extract		Include Deceased :	0					
CADBLA		Date of Death :						
		Cause Of Death :	Select optio	อกร		*		
		Diagnosed Obese :	Select optio	ons		*		
		Activity Level :	Select optio	ons		*		
		PND :					CLICK FOR FILTERS	
		No Plasters :					3	
		Body Mass Index :	Equals	Y			Ĩ.	
		Height (m) :	Equals	X			TER	
		Weight (kg) :	Equals	2				
		Cholesterol LDL :	Equals	19				
		Cholesterol HDL :	Equals	×				
		Blood Pr. Diag mmHg :	Equals	1				
		Blood Pr. Sys mmHg :	Equals	*				
		Pulse Rate (BPM) :	Equals	Y				
		Doctor:	Select optio	ons		-		
ttendance 🕓								
asework 🚺								

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:

Today	
Last 7 days	
Month to date	
Year to date	
The previous Month	
Specific Date	
All Dates Before	
All Dates After	×
Date Range	

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.

Manag	e Saved L	.ists	Clear Filter	Apply In	dividual Filter 🔰	Apply Attendan	ce Filter		2
Basic	• [Personal	Family	Location	Health	Attendances	Section	Activity	_
	Basic Se	arch Filter	20 XV			20)			
			Name :						
			Address:						
			Identifier :						
			NH Number :						
			Tel :						
			Mobile :						
			D.O.B. : Registered :						
			Notes :						
		Inc	lude Archived :						

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.

lasic	Personal Family	Location	Health	Attendances		
			i i contra da			
Personal						
	Title	Select options		v		
	Forename	1				
	Middle name					
	Surname					
	Known As					
	Gender					
	Email					
	Start Date					
	Status	Select options		*		
	Categories	Select options		-		
	Local indicator					
	Mailshots					
	Allow Photos					
	Allow Video					
	Correspondee					
	Registered Site	Select options				

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

nage Saved I	_ists	Clear Filter	Apply Inc	dividual Filter	Apply Attendanc	e Filter		
asic	Personal	Family	Location	Health	Attendances	Section	A.64989	
Persona	al							
Nationa	ichi -							
		Ethnicity :	Select options		.			
		Language :	Select options		-			
	Enj	glish Spoken :	Select options		*			
		Religion :	Select options		*			
	D	ate Of Arrival :						
	As	ylum Seeker : [
	A:	sylum Status :	Select options		*			
	F	Port Of Arrival :	Select options		*			
	Cou	ntry Of Origin :	Select 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 addressed or specify those individuals where a Date of Birth has not been set.

tage Saved Lit	sts Clear Filter	Apply Individual Filter	Apply Attendance Filter	
uic	Personal Family	Edication: Nexth	Allegances Learning Art Is	
Groups		_		
	Age 0 : 📋			
	Age 1			
	Age 2 : 📋			
	Age 3 : 📋			
	Age 4 :			
	Age 5 : 📋			
	Age Under 4 :			
	Age Under 5 : 📋			
	DoB not set:			
	Archived Addresses : []]			
-				
Adult				
Child				
Family Re	quirements			

The Adult Grouping allows you to use the following filters:

4					
Groups			 		
Adult			 		
	Parent:				
	Lone Parent :				
	Teenage Parent :				
—	Pregnant :				
	Employment:	Select options	٣		
	Due Date :				
	NI Number :				
	Unique Tax Ref. :				
	Driver Number :				
	Electorial Role Ref:				
	General Identifier :				

The Child Grouping allows you to use the following filters:

Groups						
Adult						
Child						
	Birthweight :	Equals -	T			
	Gestation :	Equals -	- I			
	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 Services

Apply Individual Filter Apply Attendance Filter Manage Saved Lists Clear Filter Family Groups Adult Child Family Requirements Support Workers : Select options ¥ Special Needs : Select options × Disabilities : Select options ×

The Family Requirements Grouping allows you to use the following 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.

inage Saved Lists	Clear Filter	Apply Ind	ividual Filter	Apply Attendan	ce Filter		
Basic Pe	ersonal Family	Location		Attendances	Session	Activity	
Address							
/	House Number :						
	House Name :						
	Street :						
	Line 2 :						
	Town :	Select options		-			
	Postcode :						
	Ward :	Select options					
<u></u>	County :	Select options		-			
	Country :	Select options		~			
Areas							

The Area Grouping allows you to use the following filters:

Address				²	
Areas				_	
[]	Area :	Select options	*		
	SOA:	Select options	*		
	District :	Select options	-		
	Deprivation Index :	Equals -			
	Site to Search :	Select options	*		

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 I	Lists Clear Filter	Apply Individual Filt	ter Apply Attendance Filter
Basic	Personal Family	Location Health	th 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	·
2017			

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 Site Attended Grouping allows you to select the centre attended.

asic		Family	Location	Health	Attendances		
Option	าร						
Site A	ttended						
Atten	dee Address						
		Street :					
		Line2 :					
		Town :	Select options		*		
		Postcode :					
		Site :	Select options		Ŧ		
		External :					

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

The Attendee Grouping allows you to use the following filters:

Manag	ge Saved Lists	Clear Filter	Apply Individual Filter	Apply Attendan	ce Filter			l
	c Per	rsonal Family	Location Health	Attendances	Session	Activity	1	
Г	o. !!						r F	
	Options Site Attende	4					F	
	Attendee Ad						F	
	Attendee	uress					1	
		Age :	Equals -				F	
		Employment :	Select options					
		Pregnant :						
		Parent :						
		Smoker :					ភ្ល	
							CLICK FOR FILTERS	
							ER.	
							1	ř
							1	
							1	
							1	
							1	P
							1	ŕ

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.

Attendee			
	Age :	Less Than 👻 5	
	Employment:	Select options	-
	Pregnant:		
	Parent:		
E	Smoker:		

9.4.2 Session

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

Mana	ige Saved	Lists	Clear Filter	Apply Inc	dividual Filter	Apply Attendan	ce Filter		
Bas	sic		Family	Location		Attendances	Session	Activity	N
	Sessio	n							F
		ę	Session Name :						F
			Comment :						
			Locations :	Select options]		F
			Key Workers :	Select options		*			F
			Targets :	Select options		.			5
			Session Aims :	Select options		*			2
		Se	rvice Providers :	Select options		-			ICK
		Ever	y Child Matters :	Select options		Ŧ			FOR
									CLICK FOR FILTERS
									M
									N N N N

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.

asic	Personal		Location	Health	Attendances	Activity	
Activit	у						
		Activity :	Select options		Ŧ		
		Locations :	Select options		Ŧ		
	К	ey Workers :	Select options		-		
		Targets :	Select options		Ŧ		
	Se	ssion Aims :	Select options		Ŧ		
			Select options		*		
	Every C	hild Matters :	Select options		*		

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

Family Services

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Data to run	Basic tab	Personal tab	Family tab	Location tab		Attendances tab	
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	Individual Filter	Options Grouping Attendance dates: enter date range Site Attended Grouping Site = your CC Attendee Grouping Age = Less than 5	Attendance Filter
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	Apply		Apply /
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	