

CPOMS Useful Reports Guide

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Individual Student Reports

1. Full Chronology Report

To run a full student report in CPOMS, access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.

- Within the student's profile, click on the 'Student Report' tab.
- Under 'Include in report' tick to include 'Incidents' in addition.
- In the additional **'Filter Incident'** options that now appear, you may wish to tick **'Include Linked Incidents'** to ensure you receive any incidents the student has been linked in to also.
- For all records please ignore the further filter options, <u>or</u> you may apply specific dates or select certain categories here. You may also wish to choose to 'Hide' Student and/ or Staff Names to redact any names in the report.
- © Scroll down to the 'Report format' and amend this to 'PDF (print view)'.
- If required enter a 'PDF password' to password protect the report, and 'Generate Report'.

This will then generate a PDF copy of the student's incidents which you can then print or save electronically.

If you would like to include any documents or files attached to any of the incidents/ actions, please go to the students 'Document Vault' where you can download a copy.

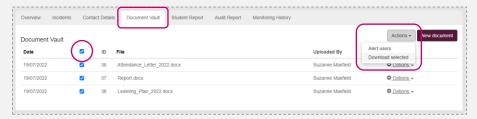
This will give you the full details of all incidents logged against the student, in a print friendly PDF format.

How do I download the student's documents/ files?

Once you have run the student report, you may wish to download the student's documents/ files as well.

To do this, access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name. Within their profile, click on the 'Document Vault' tab.

To download all, click on the very top tick box (In between the titles 'Date' and 'ID') which will select all, or if you do not wish to download all simply tick the documents you require one by one. A new button for 'Actions' will now appear to the right-hand side of the screen. Click on this option and 'Download selected'.



This will create a zip file containing all of the selected documents. The zip file usually appears to the bottom left of your internet browser for quick access and is usually saved in the 'Downloads' folder of the machine you are on (depending on your individual machine settings).





Please note, if the student has multiple pages of documents, you will need to follow the above instructions on each individual page.

Hiding names in a report

When you are running a report, in the 'Incident Filters' you will find the option to 'Hide' either Student Names or Staff Names (or both).

When you select to hide Student Names, you can choose to hide 'All' names, or 'Just Linked' names only. If you choose to hide 'All' names, the name of the student whom the report is written about will be hidden, as well as any linked students. If you choose to hide 'Just Linked' names, the name of the student whom the report is written about will not be hidden.

Please note, the system is only able to hide the first name, surname (or both) of the student for whom the report is written and any other students who are linked into the incident, as long as it is spelt identically to how it is registered in your MIS. It will <u>not</u> hide shortened/ mis-spelled versions of the names if used, or the names of any other students who are not linked into the incident. These Student Names are hidden within the incident/ action text.

When you select to hide Staff Names, the name of the staff member who wrote the report will be hidden to the left-hand side of each incident, as well as the name of the staff member it is 'Assigned to'.

We would always suggest that before you print out a report, that you first run it in the report format 'Enquiry View' to check that all the required names are removed from the text. Once you are happy with it, you can then run it as a 'PDF (Print View)'. If you then find a name in a report that you wish to hide, you can either link in the required student(s) or edit the text of the incident/ action to use initials instead, for any names that cannot be linked, and re-run the report. If this is required by your in-school procedures.

If there is a particular name or initials you wish to redact from a report as a one off, you can enter this in the 'Redact words or phrases' option before generating the report, which will redact it from the report you are generating. Simply type in the name/ initials and select it to add, you may add more than one word/ phrase.

Any, All or Exclude

When reporting on Categories in CPOMS, beneath it you can choose to focus on 'Any', 'All' or 'Exclude'.



- If you choose 'Any', the report will bring up incidents assigned to any of the chosen categories.
- If you choose 'All', the report will bring up incidents that are assigned to all of the chosen categories.

i.e. if Behaviour and Bullying were selected, incidents categorised as <u>both categories</u> would appear, but incidents assigned to just Behaviour or just Bullying would not appear.

• If you choose to **'Exclude'** the **categories**, the report will bring up all incidents **not** assigned to the chosen categories.







2. Student Monthly or Weekly Numerical Report

Access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.

- Within the student's profile, click on the 'Student Report' tab.
- At the top, amend 'Report on' to 'Incidents'.
- © Open up the **'Filters'** and in **'Between dates'**, choose your required timeframe, i.e. the last 7 days, or last month for example. <u>Leave blank for all time</u>.
- © Scroll down and amend the 'Report Type' to 'Summary Table'.
- Next, in 'Primary grouping', select 'Month and year' for monthly figures, or 'Days of the week' for a weekly view.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.

This will give you the total <u>number of incidents</u> logged against the student in question, during your selected time frame.

Report Format - What's the difference?



- 'Enquiry View' allows you to run a report and view the results on screen. Handy if you need a quick glance at data.
- 'PDF (print view)' will create a PDF copy of the report, with the option to password protect it. You can then choose to save the report electronically or print it.
- **'Excel spreadsheet'** will create a excel spreadsheet containing the results of the report you generated, which you can then further manipulate if needed.

3. Student Monthly or Weekly Numerical Report, per category

Access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.

- Within the student's profile, click on the 'Student Report' tab.
- At the top, amend 'Report on' to 'Incidents'.
- Open up the **'Filters'** and in **'Between dates'**, choose your required timeframe, i.e. the last 7 days, or last month for example. <u>Leave blank for all time</u>.
- © Scroll down and amend the 'Report Type' to 'Summary Table'.
- In 'Primary grouping' leave on 'Category'
- In **'Secondary Grouping'** select 'Month and year' for monthly figures, or 'Days of the week' for a weekly view.



- In **'Report Format'** select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- Lastly click 'Generate Report'.

This will give you the total <u>number of incidents</u> logged against the student in question <u>per category,</u> during your selected time frame.

4. Students Incidents Pie Chart

(There is a pre-populated pie chart located at bottom of each students 'Overview' page)

Access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.

- Within the student's profile, click on the 'Student Report' tab.
- At the top, amend 'Report on' to 'Incidents'.
- © Open up the **'Filters'** and in **'Between dates'**, choose your required timeframe, i.e. this term, school year for example. <u>Leave blank for all time</u>.
- You may also choose to focus on specific **'Categories'** if you wish, by ticking the relevant category names here. Leave all categories un-ticked to run the report on all categories.
- © Scroll down and amend the 'Report Type' to 'Summary Chart'.
- In 'Primary grouping' leave on 'Category'
- In 'Chart Type', select 'Pie'.
- C Lastly click 'Generate Report'.

This will give you a breakdown of the types of incidents logged against the student in question, in a pie chart format.

How to print a Graph/ Chart in CPOMS Reporting



To print a graph/ chart you have created in CPOMS Reporting, simply swap the graph/ chart from 'interactive mode' to 'image mode'.

Once in 'image mode' you are able to right-click on the image and choose to 'save image as', or you may 'copy image' and paste the image into another program *i.e.* Microsoft Word and print it from here.

If you choose 'save image as', once you open the file from within your own desktop you should now have the option to print it.



Whole School Reports

5. Number of incidents on the system

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- © Select to 'Report on' > 'Incidents' at the top.
- © Open up the **'Filter Incidents'** options and select the date range and/ or any categories that you wish to focus on. *Leave blank for all time, and all categories*.
- You may also wish to 'Include Linked Incidents' if this report will include incidents linked to multiple students or family based incidents.
- Amend the 'Report Type' to 'Summary Table'.
- Tick **'Show number of associated students'** for an extra column displaying the number of actual students involved per incident category.
- For 'Primary Grouping' leave on 'Category'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.

This will give you the total <u>number of incidents</u> logged on the system during the <u>date range</u> selected. If you chose certain categories only, incidents logged against other categories will be excluded <u>from the total</u>.



Report Title

If you create a new report that you will need to run again, you can save the report filters by giving your report a 'Report Title' and clicking 'Save Report' (instead of 'Generate Report').

Saved reports can be found and easily regenerated in the 'Reporting' area > 'Saved Reports' tab.

Make report recur

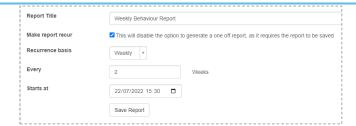
As well as saving reports, you can 'Make report recur', it will then regenerate itself automatically within the specified timeframe - handy for reports you need to run every week/ month.

To make a report reoccur, firstly enter a 'Report Title' and tick the 'Make report recur' option. Further options will now appear for you to choose from.



- Recurrence basis:- Select the recurrence basis i.e. Daily, Weekly, Monthly.
- Every:- Enter the number of times you wish for the report to reoccur e.g. 'Every' 2 weeks for example.
- Start at:- Enter the date and time you wish for the report to run for the first time.
- When you are ready, click on 'Save Report'.





The report will then generate on screen and appear within the 'Reporting' area > 'Saved Reports' tab should you need to update any settings.

Going forward you will receive an email notification for 'Scheduled Report Generated', including a link to view the report. A copy of each report will also be stored within 'Reporting' area > 'Saved Reports' tab.

Saved Reports tab

Once you have saved a report or created a recurring report, it will appear within your 'Saved Reports' tab (Within the 'Reporting' section of CPOMS).



If you click on the report name, you can easily regenerate the report in either 'Enquiry view' or 'PDF (print view)'.

If you click on 'Options' at the end of its row, you will receive further options to choose from, please note these options vary depending if it is a recurring report or not:-



- **Publicise** If you would like to share a common report with all users who can access the 'Reporting' section of CPOMS, click on 'Publicise' it will then appear within each users own 'Reporting' area > 'Saved Reports' tab.
- Change Expiry If you would like the report to stop reoccurring by a certain date you may select or edit it here.
- Create Sharing Link If you would like to share a report with an individual, you can create a sharing link. Simply click on 'Create Sharing Link', please be aware by creating this link, any one with access to it can view the report without a CPOMS login. Once you have created the link, click on 'Options' again, further options will now be available for 'View Link', 'Change Link' and 'Remove Link'. If you wish to share the link with someone else, click on 'View Link'. In the pop-up, choose how you wish the report to be displayed i.e. Enquiry View or PDF (Print View) and then copy the unique web address, which you can then share with them.

Once you know they have accessed the report, you may wish to go back to 'Options' and 'Remove Link' to revoke access.

• **Regenerate** - If you wish to amend any of the saved report filters, *e.g. update the date range*, click on 'Regenerate'. You can then amend the filters to suit your needs and 'Generate Report'.



- Edit Schedule If you wish to amend the timeframe the report runs.
- Cancel Schedule To stop the report reoccurring.
- Delete This will delete the report fully from your 'Saved Reports' section, if it is no longer required.

6. Number of incidents per Student

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- © Select to 'Report on' > 'Incidents' at the top.
- © Open up the **'Filter Incidents'** options and select the date range and/ or any categories that you wish to focus on. *Leave blank for all time, and all categories*.
- You may also wish to tick to 'Include Linked Incidents' if this report may include incidents linked to multiple students or family based incidents.
- Amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' choose 'Student'.
- You may choose 'Secondary grouping' > 'Category' if you would like to see the number of incidents, per student, by category. For the total number of incidents only leave secondary grouping blank.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.

This will give you the total <u>number of incidents</u> logged against <u>each student's name</u>, during the selected date range. If you chose the secondary grouping 'category' the total will be broken down by the category(s) the incident was logged under.

7. Number of incidents by day of the week

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- © Select to 'Report on' > 'Incidents' at the top.
- Open up the **'Filter Incidents'** options and select the date range *i.e. last 7 days*, and/ or any categories that you wish to focus on. *Leave blank for all time, and all categories*.
- You may also wish to tick to 'Include Linked Incidents' if this report may include incidents linked to multiple students or family based incidents.
- Amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' leave on 'Category'.
- For 'Secondary Grouping' choose 'Day of the week'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.



This will give you the <u>number of incidents</u> logged on each <u>day of the week</u>, during the selected date range. If you chose certain categories only, incidents logged against other categories will be excluded from the total.

8. Weekly Incident Report (Useful for DSL meetings)

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select the 'last 7 days', under 'Between dates'.
- Leave the 'Report Type' as 'Listing'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This will give you the details of all incidents logged in school, during the last 7 days.

9. Monitored Student Report

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Students' at the top.
- Open up the 'Filter Student' options and select 'Monitored Students'. You may select to report on those who are monitored 'Now', those who have 'Ever' been monitored, or those monitored 'Between' certain dates.
- Next, scroll down to choose your 'Report type':-
 - **Listing** will give you each monitored student's basic information. You can choose which fields to display via the **'Include in report'** tick boxes.
 - **Summary Table** will give you the total number of monitored students in each category. (Leave 'Primary Grouping' on 'Category')
 - **Summary Chart** will give you the percentage of monitored students in your chosen chart format. (Leave 'Primary Grouping' on 'Category')
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- © Lastly click 'Generate Report'.

What are the Report Types?



The report type you select decides how your results are displayed:-

- Listing Lists the results in most detail individually.
- **Summary Table** Creates a numerical table displaying the number of results in each group as specified by your selected 'Primary Grouping' and 'Secondary Grouping' option.



- **Summary Chart** Similar to the summary table, but in a chart format. You can choose the type of chart once this option is selected, including Pie, Column and Bar.
- **Combined Graph** Is a chart that combines two groupings on the same graph.

10. Pupil Premium vs Non Pupil Premium incidents

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Students' at the top.
- Amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' choose 'Pupil Premium'.
- For 'Secondary Grouping' choose 'Category'.
- © Tick 'Separate table per secondary grouping' for a clearer view of the data.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This gives you the total number of students monitored for each category who are Pupil Premium and Not Pupil Premium, for comparison.

11. Active and Closed incidents

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select the date range, if applicable.
- © Scroll down and locate 'Status', choose 'Active' or 'Closed'. (In the 'Filter Incidents' options
- Next, scroll down to choose your 'Report type':-
 - **Listing** will give you the full details of the 'active' or 'closed' incidents (depending which status you selected)
 - **Summary Table** will give you the total number of 'active' or 'closed' incidents against each category (depending which status you selected). (Leave 'Primary Grouping' on 'Category')
 - Summary Chart will give you the percentage of 'active' or 'closed' incidents (depending which status you selected) against each category in your chosen chart format. (Leave 'Primary Grouping' on 'Category')
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.



12. Number of 'Behaviour' incidents by year

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select your 'Behaviour' category.
- Scroll down, and amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' leave on 'Category'.
- For 'Secondary Grouping' choose 'Year'.
- In **'Report Format'** select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.

This will give you the total number of 'Behaviour' incidents logged per year.

13. Number of students monitored for Child Protection or CIN

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Students' at the top.
- Open up the 'Filter Students' options, under 'Monitored Categories' choose 'Child Protection'. Once chosen, you can choose to look at those who are monitored 'Now', who have 'Ever' been monitored or those monitored 'Between' a certain timeframe choose the option which best suits your report.
- Under 'Monitored Categories' again, choose 'CIN' and again choose 'Now', 'Ever', or 'Between'.

 Leaving the option beneath 'Monitored Categories' on 'Any'.
- © Scroll down, and amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' leave on 'Category'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This will give you the total number of students monitored under Child Protection and CIN.

14. <u>Incidents logged by a certain staff member(s)</u>

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select a date range if applicable, or leave blank for all time.



- Still in 'Filter Incidents', scroll down a little and in the 'Staff Member' field, begin typing the relevant staff members name, once their name appears, click on it. You may choose more than one staff member if needed.
 - The option beneath 'Staff Member' should be selected on 'Only'.
- © Scroll down and leave the 'Report Type' on 'Listing'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This will give you the details of all incidents logged by the chosen staff member(s), during the time frame selected (if any).

15. Number of incidents logged per Staff Member

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select a date range if applicable or leave blank for all time.
- © Scroll down and amend the 'Report Type' to 'Summary Table'.
- Tick 'Show number of associated students' for an extra column displaying the number of actual students they have logged incidents against.
- For 'Primary Grouping', choose 'Created by'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- **©** Lastly click 'Generate Report'.

This will give you the total number of incidents logged by each staff member, as well as the total number of students they have logged incidents for.

16. Number of incidents logged by SEN Status

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Students' at the top.
- © Open up the 'Filter students by incidents' options and select a date range if applicable or leave blank for all time.
- Scroll down and amend the 'Report Type' to 'Summary Table'.
- For 'Primary Grouping' choose 'SEN Status'.
- For 'Secondary Grouping' choose 'Category'.
- Tick 'Separate table per secondary grouping' for a clearer view of the data.



- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This will give you the total number of incidents logged for each category, for each SEN Status.

17. Running a report on a single sub-category

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- © Open up the 'Filter Incidents' options and select a date range if applicable or leave blank for all time.
- Still in 'Filter Incidents', scroll down a little and under 'Categories' select the top-level category name, once selected, you may now choose the sub-category name that you wish to report on.
 - Please amend the option beneath 'Categories' to 'All'.
- © Scroll down and leave the 'Report Type' on 'Listing'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- C Lastly click 'Generate Report'.

This will give you the details of all incidents logged against the sub-category, during the time frame selected (if any).

18. Searching incidents by key word

- Navigate to the 'Reporting' area (at the top of the dashboard), and click on the 'Custom Report' tab.
- Select to 'Report on' > 'Incidents' at the top.
- Open up the **'Filter Incidents'** options and in **'Containing'** type in your key word and **press enter**. You may input more than one word by typing in your next word and pressing enter again.
 - Beneath 'Containing', please choose 'Any' to search for any of the words you have entered, 'All' for an exact match, or 'Exclude' to exclude any incidents containing this word.
- Scroll down and leave the 'Report Type' on 'Listing'.
- In 'Report Format' select 'Enquiry view' to view the results on screen, or 'PDF (print view)' for a printable PDF version.
- Lastly click 'Generate Report'.

This will give you the full details of incidents containing the key words you have input, or exclude them from the report if this option was chosen.



For further assistance on any of the above please do not hesitate to contact us on **01756 797766** or **support@cpoms.co.uk**.

