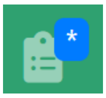
REPORTING IN HELIX

There are several ways of producing reports in Helix:-

- From the '**Quick Jump List'** in the **Client Module**

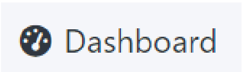


- '**Reports and Multiple Actions'** in the **Client Module**

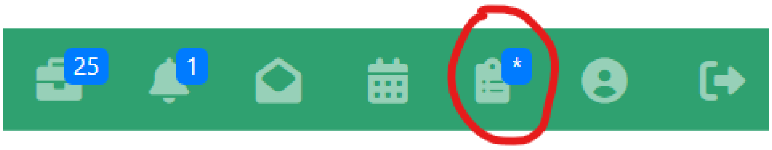
- **Web Reports Module**

- '**Reporting**' in the **Training Module**

- In the **Dashboard** - this will be covered in a separate document.



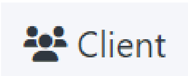
Quick Jump List Reports



The Quick Jump List is a quick way to find relevant clients, perform actions (such as adding an Activity) for multiple clients at once, communicating with a group of clients, or producing several useful Reports for a group of clients.

It is a good idea to **add your Caseload to your Quick Jump List**, you can do this by:-

- Going to the Client Module by clicking on the button in the left-side menu



- You should see your caseload clients listed, like this:-

Client

Clients Associated with your Caseload

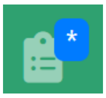
Client Ref	Forename	Surname	Status
Ben90504	Mr	Benn	
Cat87079	Tom	Cat	
Cay87080	Hungrie	Cayote	
Daw62870	Daisy	Dawg	Stage 2
Dis87098	Goofy	Disney	
Dog90447	Auggie	Doggie	
Doo87085	Scrappy	Doo	
Duc63218	Daffy	Duck	Stage 2
Fli90451	Betty	Flintstone	

- Click on the 'Add to Quick Jump List' button at the bottom of the list.

  Add To Quick Jump List

  NB If you have used this feature before for a different set of clients make sure you clear your Quick Jump List before doing this.

  NB If any of your Caseload Clients don't appear in the list, you'll need to add yourself as their Caseload first (go to Clients/Find Client then find the relevant client and select 'Details/Details' and scroll down to Caseloads, then click on Add to add yourself. If you don't have access to the Client or are not listed in the Caseload pop-up, please get in touch with Gordon or Chris at CCP.
- Then open your Quick Jump List by clicking on the icon in the top bar.



- It should look like this:-

Quick Jump List ×

Client

Add individual client to list

Type and select a client...

add current client | add in bulk

Show 10 entries   Search:

Client	
(Ben90504) Mr Benn	
(Cat87079) Tom Cat	
(Cay87080) Hungrie Cayote	
(Daw62870) Daisy Dawg	
(Dis87098) Goofy Disney	
(Dog90447) Auggie Doggie	
(Doo87085) Scrappy Doo	
(Duc63218) Daffy Duck	

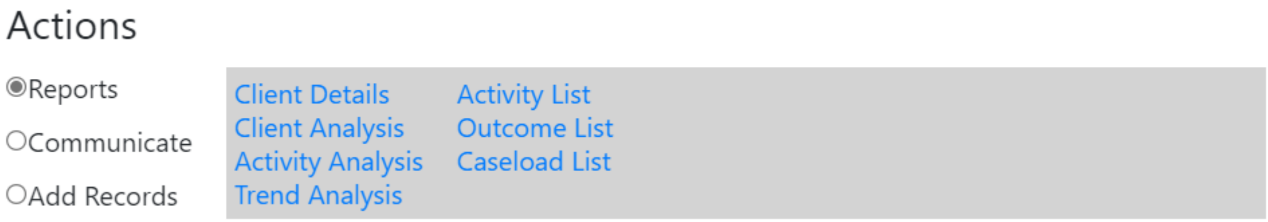
Actions

Reports
Communicate
Add Records

Client Details, Activity List, Client Analysis, Outcome List, Activity Analysis, Caseload List, Trend Analysis

Dismiss

At the bottom of the Quick Jump List, under ‘Reports’, there are a selection of reports you can run based on the Clients you’ve added. These are:-



Selecting any of these Reports will create a **web report** which you can view in your browser.
Most of these can be **downloaded** in **Excel**, **PDF** or **Word** format.
NB it is most secure to keep your data within the Helix system.
NB See the ‘Glossary of Helix Reports’ document for more details regarding these reports.

Reports and Multiple Actions – Client Module

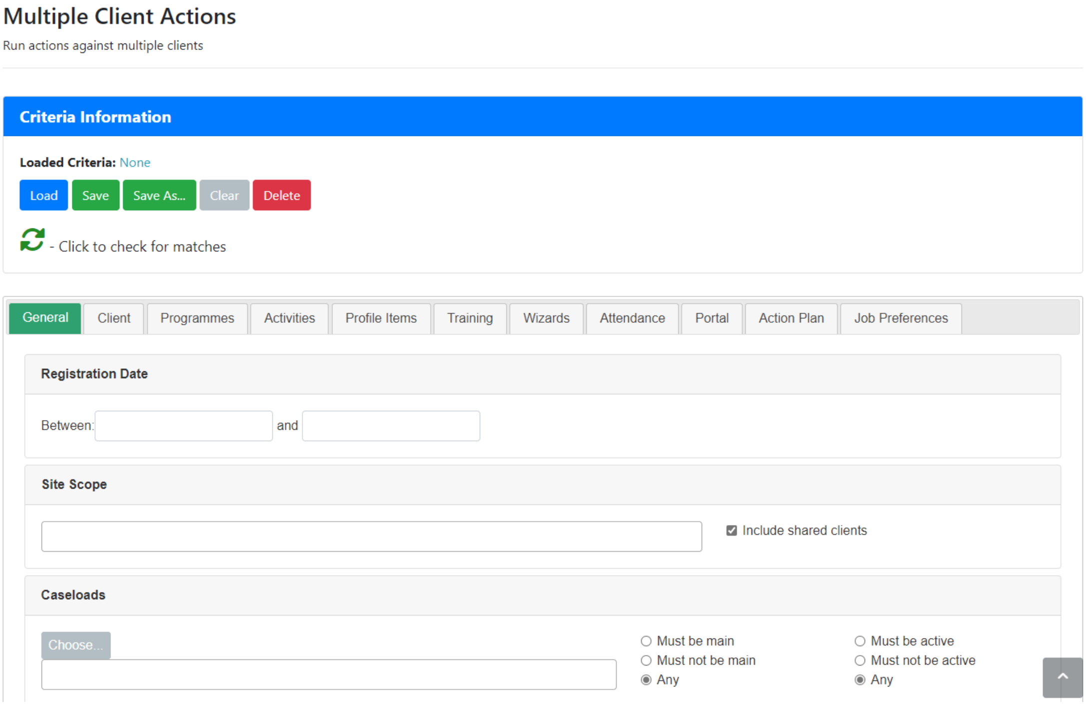
You can use this section to produce **tailored Client reports** with advanced settings and filters.

Instructions

- Select the Client Module

- Then click on

- Your Screen will look like this:-

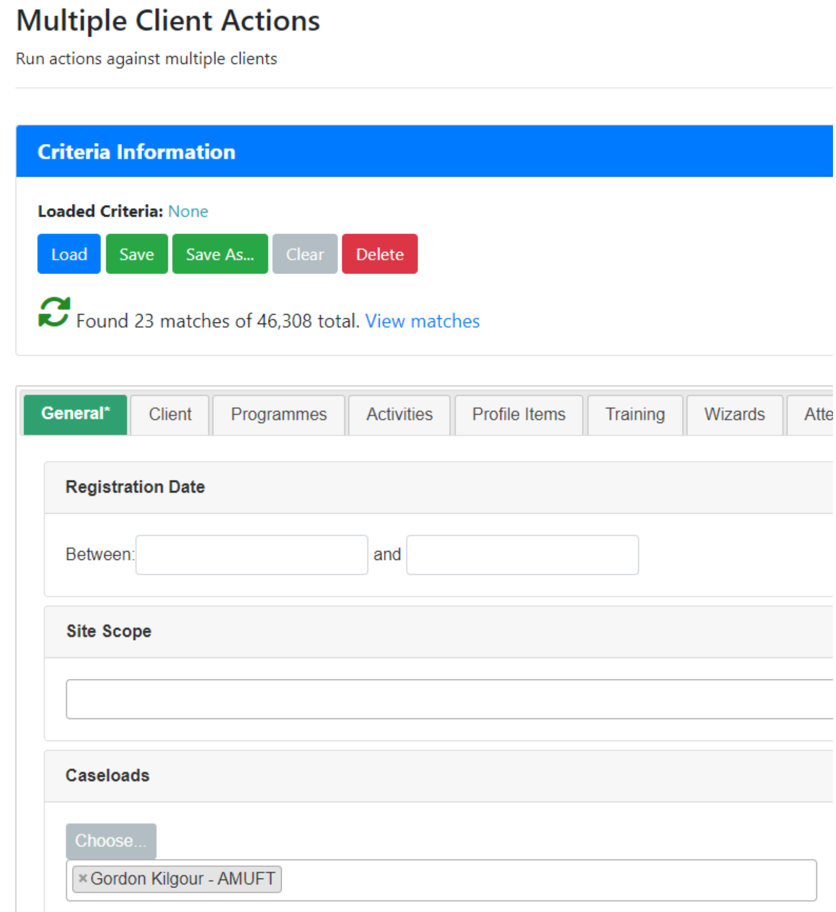


You will see various tabs where you can specify precisely what criteria you want for your report.

Filling in details for any of the fields provided will help you hone in on the specific Clients, Dates, Programmes, Activities etc that you want in your report.
When you change your Criteria you can immediately check how this has affected the number of Client matches by clicking on:-

- Click to check for matches

For example, if you enter your name in the Caseloads field in the General tab, then click on 'Click to check for matches' you will see a count of matching Client records, like this:-



You can then click on '**View Matches**' so review the list of matching Clients:-

Client Ref	Forename	Surname	Birth Date	Postcode	NI Number	Client Site
Ben90504	Mr	Benn	13 Apr 1966	EH6 8NR	________	CCP
Cat87079	Tom	Cat	25 Apr 1998	EH16 4BG	QW111111Q	CCP
Cay87080	Hungrie	Cayote	01 Jun 2000	EH13 6TY	KK454545K	CCP
Daw62870	Daisy	Dawg	12 May 1995	EH8 8BD		CCP
Dis87098	Goofy	Disney	12 May 2005	EH16 4BU		CCP
Dog90447	Auggie	Doggie	02 Sep 1965	EH4 3EF	AA222222D	CCP
Doo87085	Scrappy	Doo	07 Feb 1993	EH13 6TY	RR999999R	CCP
Duc63218	Daffy	Duck	01 Oct 2000	EH21 6JN		Admin
Fli90451	Betty	Flintstone	05 Jan 1970	PH1 1AA	AA123456A	CCP
Had90476	Captain	Haddock	12 Aug 1970	EH9 1QR	________	CCP

Showing 1 to 10 of 23 entries (filtered from 46,308 total entries)

1 2 3

Select action Close

You will notice that any Tab where you've entered criteria will have an Asterix against its name, like this:-

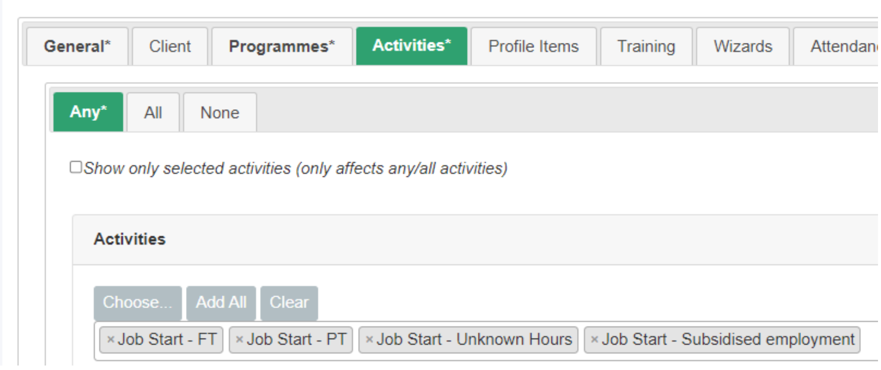
You can **clear all Criteria** you've entered using:-

Saving your Criteria

If there is a set of criteria you want to re-use at a later date, you can save and re-use them at any time.

For this example, I've set:-

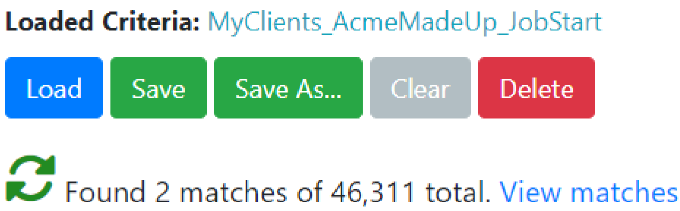
- the Caseload to myself in the General Tab (you can add multiple Caseloads).
- the Programme to 'ACME Made up for Training' in the Programme tab (you can add multiple Programmes)
- Activities to contain multiple 'Job Start' values, like this:-



- Click on

And enter an **appropriate name**.
In this example I've used 'MyClients_AcmeMadeUp_JobStart' to reflect the criteria entered above, but use whatever makes sense to you.

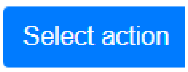
- Once your Criteria are saved (or Loaded from a previous save), the Criteria name will be visible:-



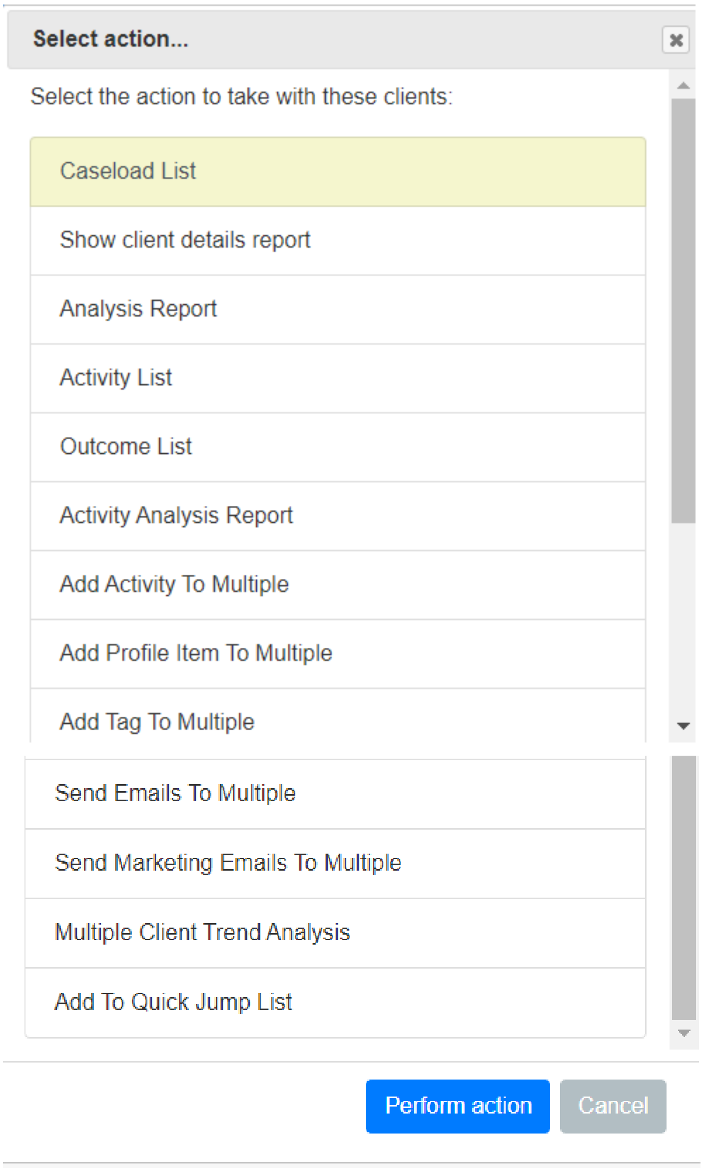
- If you think your saved criteria are not quite right, Load them, make changes to the Criteria and then click on Save. **NB** This will overwrite your previous save, use 'Save As…' to create a new Criteria Name.
- The 'Clear' button will clear the current Criteria.
- The 'Delete' button will permanently delete the Loaded Criteria (in this example it would delete 'MyClients_AcmeMadeUp_JobStart'.

Creating Your Report

When your criteria are set as you'd like, click on 'View Matches', which will bring up the Matches window (as above), then click on:-



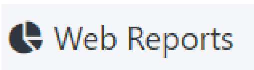
This will bring up the 'Select action' window:-



Click on the desired report (or action) then click the ‘Perform Action’ button.

NB This includes all of the same reports as you can generate from the **Quick Jump List**, but some of the names are very slightly different and the ‘Add Records’ and ‘Communicate’ actions are all included in the same list.
NB You can also add matching clients to your Quick Jump List using the bottom action on the list.

Web Reports Module

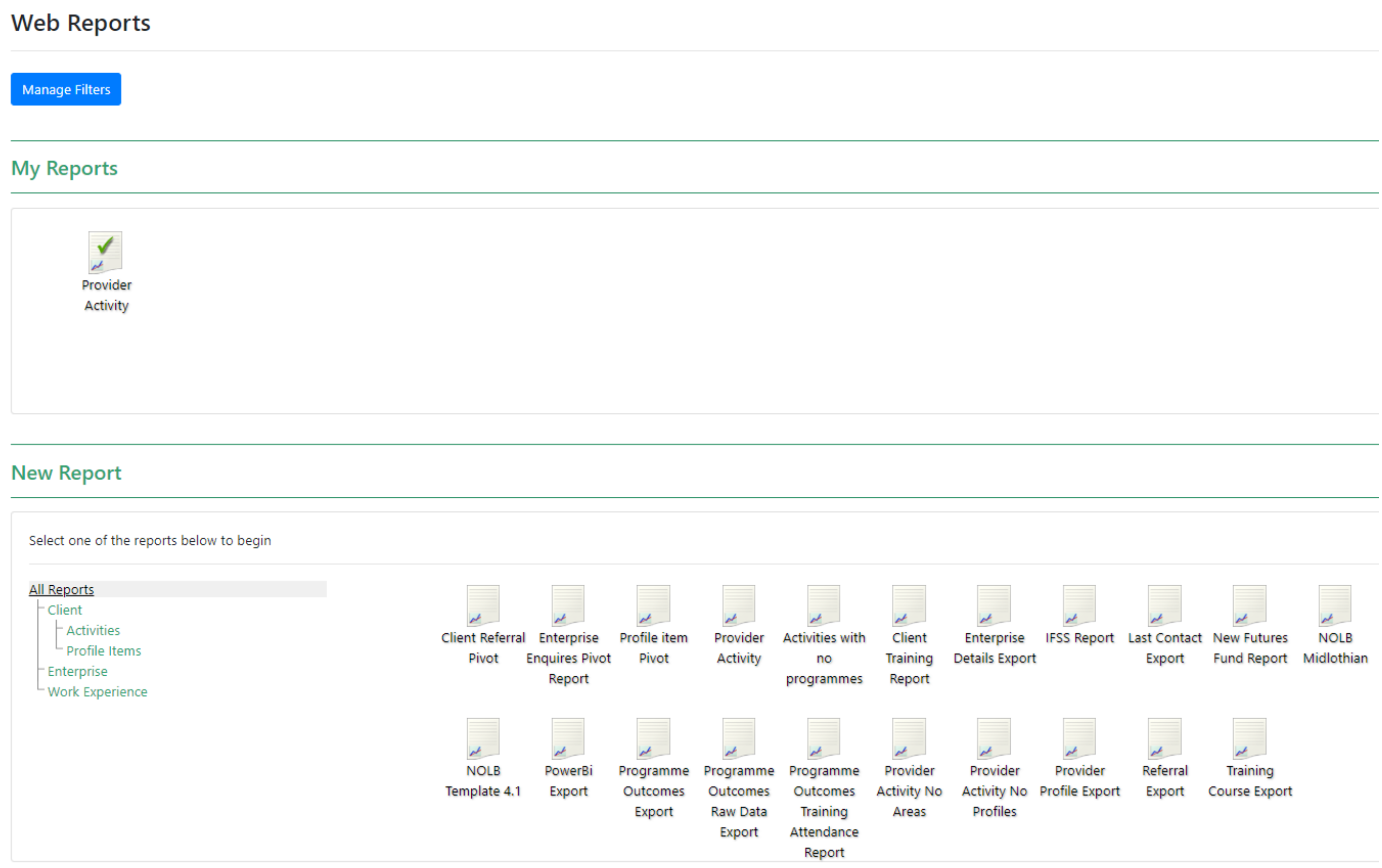


The Web Reports module provides complex, customisable reports which mostly take the form of Excel-style Pivot Table reports but in the web browser.

NB Many of these reports require Criteria in order to run. These criteria must be created and saved in Client/Reports and Multiple Actions before you can run the report.

NB There is a fairly large list of web reports (you may not see all of those listed below) and many don’t have particularly meaningful names. Please refer to the ‘**Glossary of Helix Reports’** document for more information.

The main Web Reports window looks like this:-

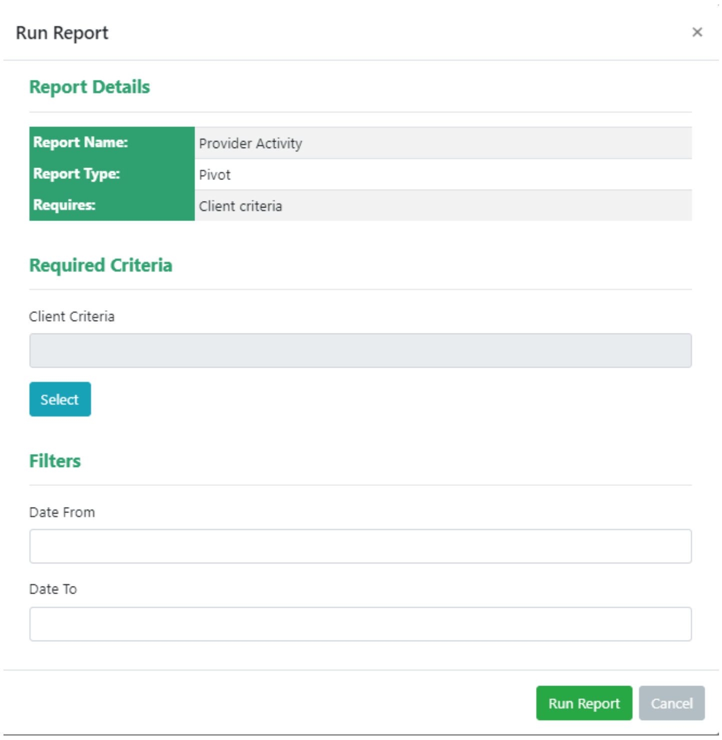


To run a report either select it from the 'New Report' area, or rerun a previously generated report from the 'My Reports' section.

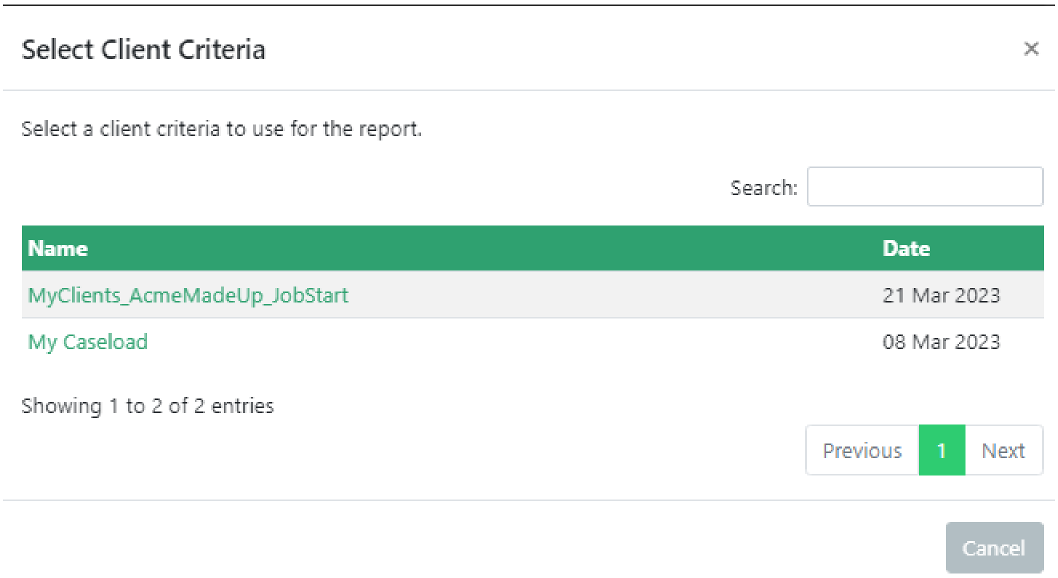
NB Reports that are re-generated from your My Reports list will have the same criteria, such as dates, as when you first ran it. If you wish to run the same report with new criteria, generate it again from the 'New Report' area.

<u>Example Report</u>

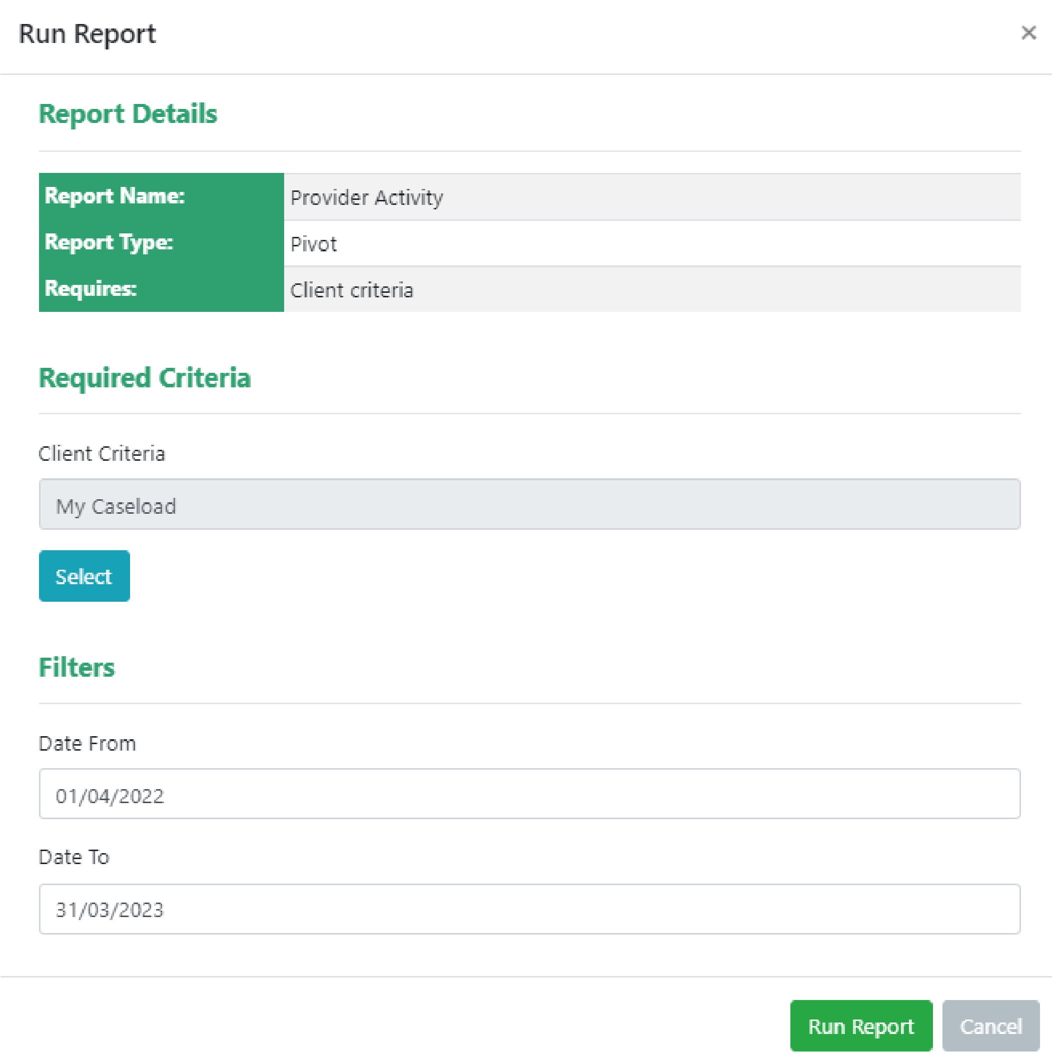
I've used the 'Provider Activity' report as an example. This report requires 'Client Criteria' to run. You can also enter a date range as a filter but this is not mandatory.



Click on ‘Select’ under ‘Required Criteria’ to select your (pre-saved) Criteria.



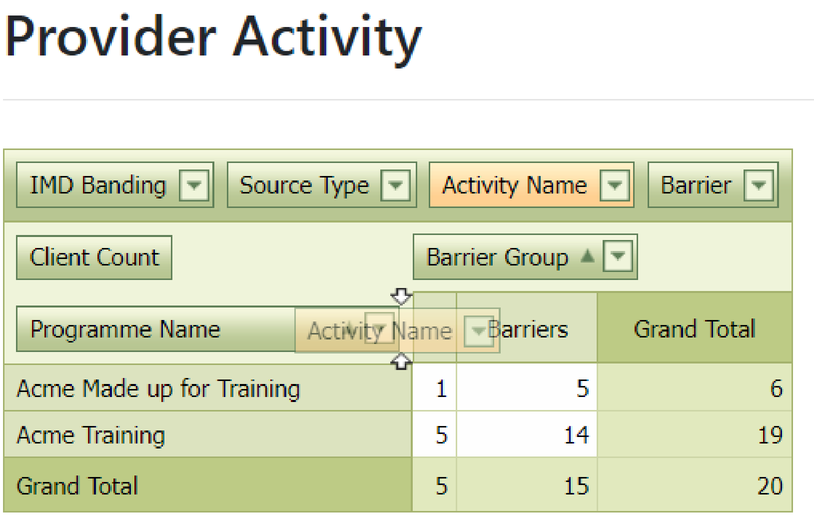
For the example, I’ve selected ‘My Caseload’ (saved Criteria that just has my name under Caseloads in the General tab of ‘Clients/Reports and Multiple Actions’) and entered a date range:-



This is an example of how the report looks by default but it can be edited to make it more meaningful.

The Field Names along the top can be dragged and dropped into the report.

For example, here I am dragging Activity Name to the right of Programme Name, until the two arrows appear,



then dragging Barrier to the right of Barrier Group. This results in the following report:-

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IMD Banding | Source Type

Client Count | Barrier Group | Barrier

Programme Name	Activity Name		Armed Forces veteran	Asylum seeker	At risk of becoming NEET	Care experienced - Barriers	Criminal convictions	Current Substance Use	From Employment Deprived Areas	From Remote Rural Areas	Homeless or affected by housing exclusion	Living in a jobless household	Living in a single adult household with dependent children	Long term physical illness	Long term unemployed - Barriers	Looked after young person	Low Income Household	Low Skilled	Mental health issues	Migrants people with a foreign background, minorities (including marginalised communities such as the Roma)	No or Limited work experience	Primary carer of a child/children (under 18) or adult	Refugee	Substance related conditions	Underemployed	Barriers Total	Grand Total
Acme Made up for Training	13 Weeks Sustainment	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	CV Advice	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	1	2
	Employability Training	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Invited to Interview	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Job application	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Job search	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Job Start - FT	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1	1
	Move to Stage 2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	One to one meeting	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Started on Programme	1	0	2	0	0	1	2	1	1	0	0	1	0	2	0	2	1	0	0	0	0	0	1	0	5	6
	Started Training Course	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Started Volunteering	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
Acme Made up for Training Total		1	0	2	0	0	1	2	1	1	0	0	1	0	2	0	2	1	0	0	0	0	0	1	0	5	6
Acme Training	13 Weeks Sustainment	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1	0	0	1	0	0	0	0	1	1
	4 Weeks Sustainment	3	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1	0	0	1	0	0	0	0	1	4
	Action Plan Created	0	0	0	0	0	1	0	0	1	0	0	0	0	0	0	1	2	1	0	1	0	0	0	0	2	2
	Action Plan Updated	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Action Planning	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	1
	Childcare Advice and Support	1	1	0	2	0	3	0	1	0	2	2	0	0	0	2	0	4	4	2	3	1	1	0	2	7	8
	Email Sent	0	1	0	0	0	1	0	0	0	1	1	0	0	0	0	0	1	1	0	1	0	0	0	1	1	1
Grand Total		5	3	3	2	1	4	2	2	1	2	2	2	1	2	2	3	5	6	3	3	2	2	1	2	15	20

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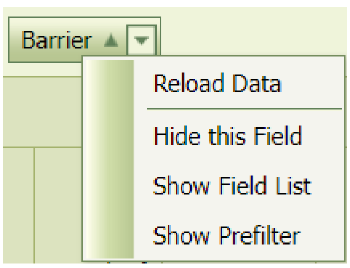
You can **remove a field** from the report by right-clicking on it and selecting ‘Hide this Field’:-

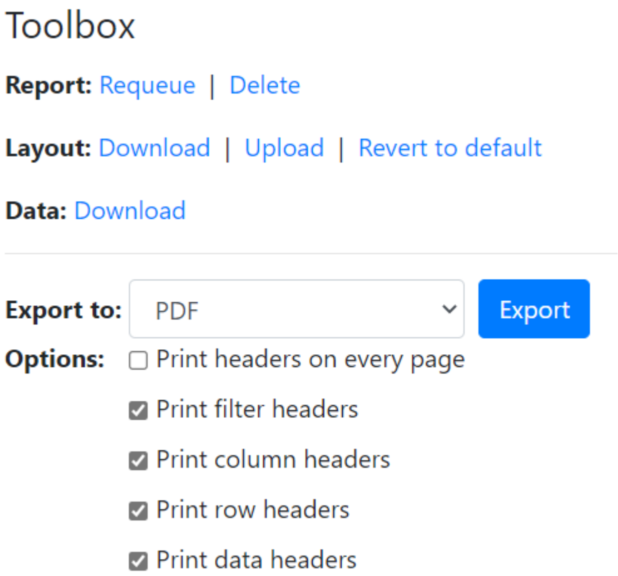


You can also **add any other available Field** to the report by selecting ‘Show Field List’ from the menu above. This will bring up a list of all available fields, which can be dragged and dropped into the report, as above.

Viewing and Exporting your Report

Once you're happy with the way your report looks, you can either view the data within the web browser, or export in a variety of formats.

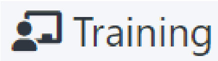
NB The most secure option is to view your data within Helix, where it is protected behind a firewall.



- **Report**
  - **Requeue** will regenerate the report using the same criteria originally entered.
  - **Delete** will delete the report from your 'My Reports' area.
- **Layout**
  - **Download** will download the report layout with no data.
  - **Upload** – here you can upload your own layout content.
  - **Revert to default** – this will remove any changes you've made to the report layout and revert to the default report.
- **Data**
  - **Download** – this downloads the raw data behind the report, without the layout.
- **Export to** – options are:-
  - PDF – Portable Document Format
  - Excel – Excel spreadsheet
  - MHT – A web archive format, which includes text, images, audio etc.

- RTF – Rich Text Format: text with formatting
- Text – Plain Text: text with no formatting
- HTML – HyperText Markup Language: Web format

Training Module Reports



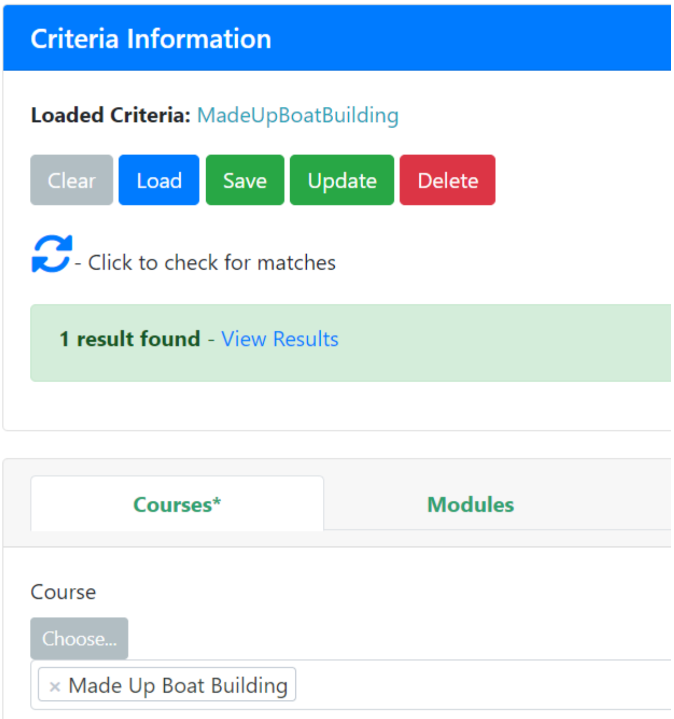
In this section you can produce reports on Training Courses you've run, including details like enrolment, attendees and completions.

Click on the Training Module in the left-hand menu and select

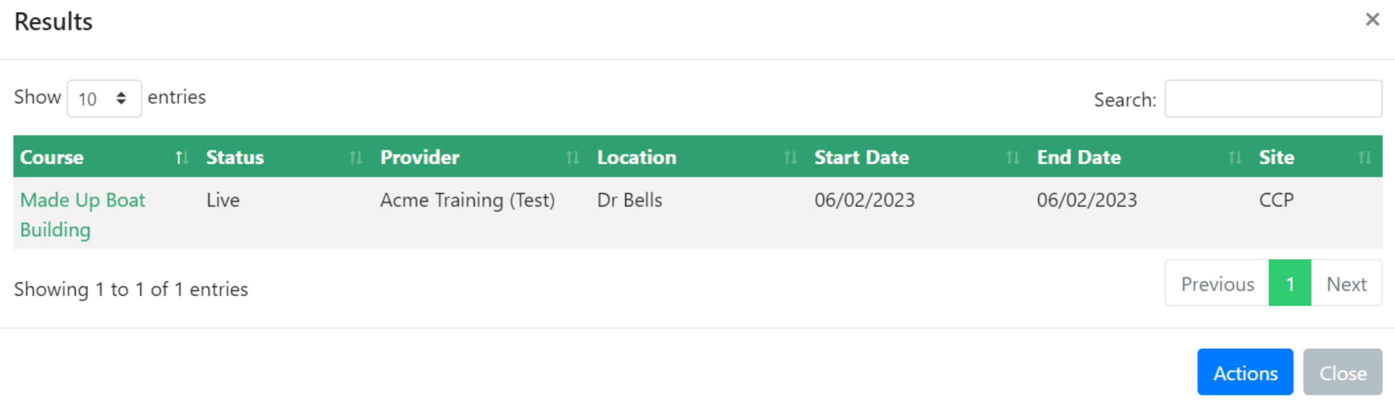
NB These reports require Criteria in order to run, which must be pre-saved in a similar way to the Client 'Reports and Multiple Actions' section.

As an Example, I've saved a single Criterion with the Course 'Made Up Boat Building' entered under 'Course' in the 'Courses' tab.

As with the 'Reports and Multiple Actions' section of the Client module, clicking on the blue Refresh button will show the number of matches, but in this case will show the **number of Training Courses** which match the criteria entered.

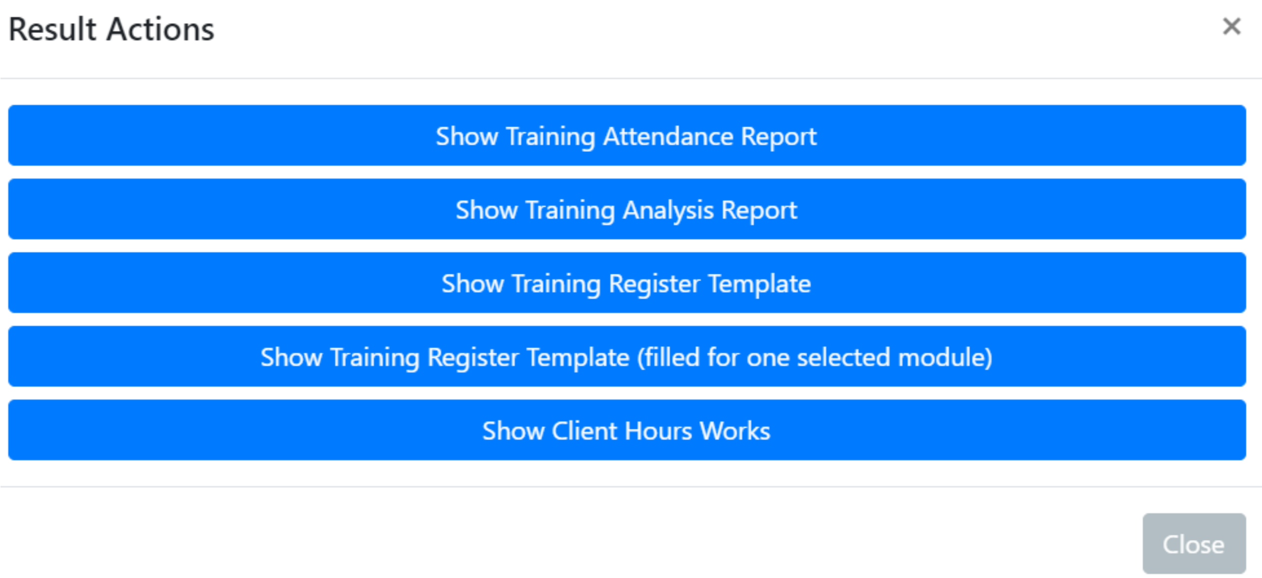


Click on 'View Results' to view the matching Training Courses:-



Course	Status	Provider	Location	Start Date	End Date	Site
Made Up Boat Building	Live	Acme Training (Test)	Dr Bells	06/02/2023	06/02/2023	CCP

Then click on '**Actions**', to view the range of available **Reports**.



Please see the 'Glossary of Helix Reports' document for more details of each report.
These reports can be exported in Excel, Word or PDF formats.
NB It is most secure to view your data in the Helix system.