EDDI CMS BUSINESS INTELLIGENCE (AGENCY REPORTS) USER GUIDE

Why should I use Business Intelligence reports?

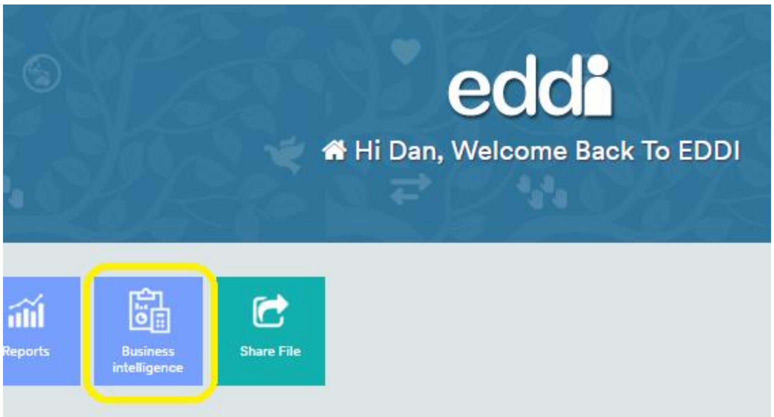
Business Intelligence reports provide quick and user friendly access to data about prospective and accredited carers at your agency. Through these reports you have a wealth of information at your fingertips, including but not limited to:

- stats on prospective and accredited carers for team and board reports
- real time information on compliancy checks
- customised mailing lists
- a heat map where you can identify accredited households available for placement

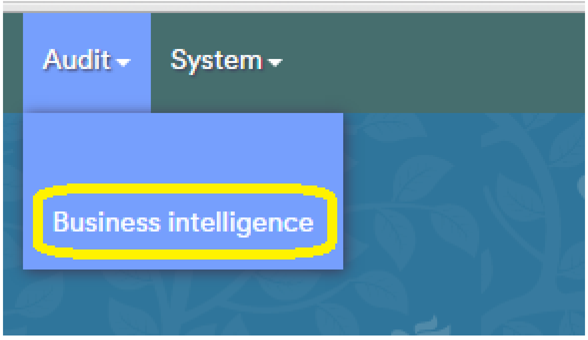
If you have any questions about how to use Business Intelligence reports, please ask the EDDI CMS helpdesk or Fostering Connections Project Team for assistance.

Where do I access Business Intelligence reports?

You can access reports in the **Business Intelligence** module via the icon on your EDDI CMS homepage.

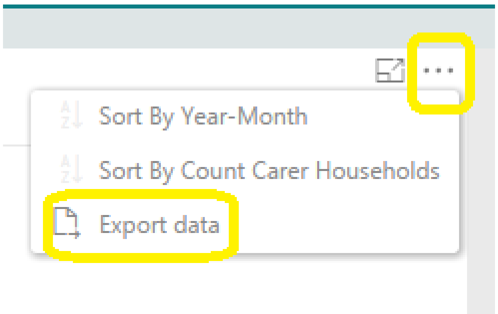


You can also access reports via the **audit** menu at the top of your screen. This is useful if you are not on the EDDI CMS home page and need to access a report.

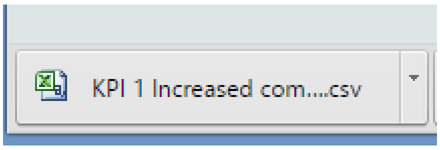


How do I download Business Intelligence report data?

All report data is downloadable as a **.csv** document which opens in **Microsoft Excel**. To download a report, hover your cursor over the report, select the **… icon** at the top right hand corner of the page and select **Export Data.**



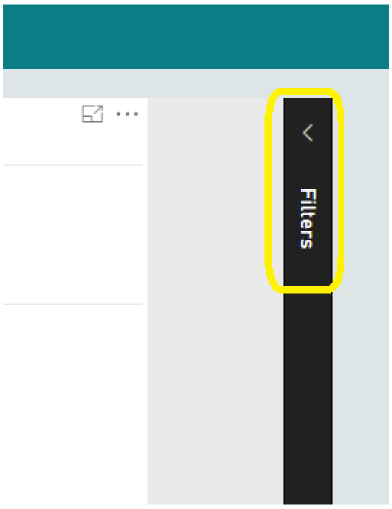
The downloaded report will automatically appear in the bottom left hand corner of your screen.



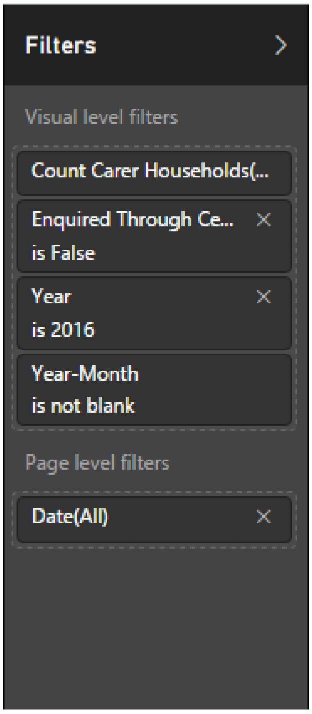
Can I choose what information I download in a report?

Yes you can. Each report has default settings, but you can specify the type of information you want to see or download by using the report **filter**, which is available on the right hand side of the page in each report**.**

To expand (open) the filter, **click on the Filters panel.**

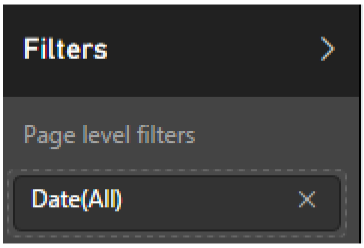


The panel will then expand and appear as per the image below:

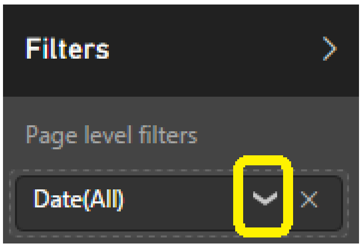


How do I use the filter?

To set a filter, hover your cursor over the field name to reveal the down arrow. Click on the down arrow to expand the list to select the information you want to filter.



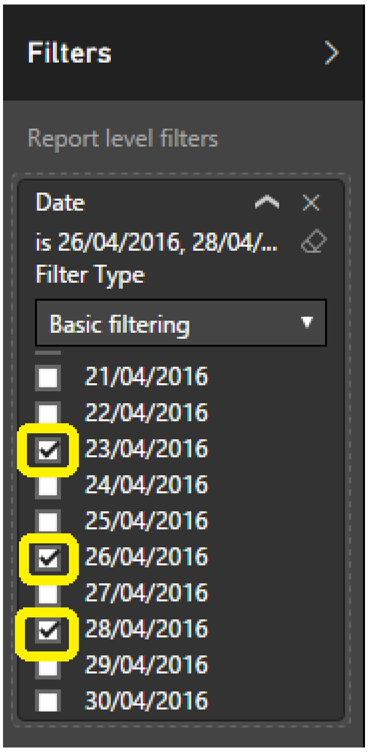
Step 1



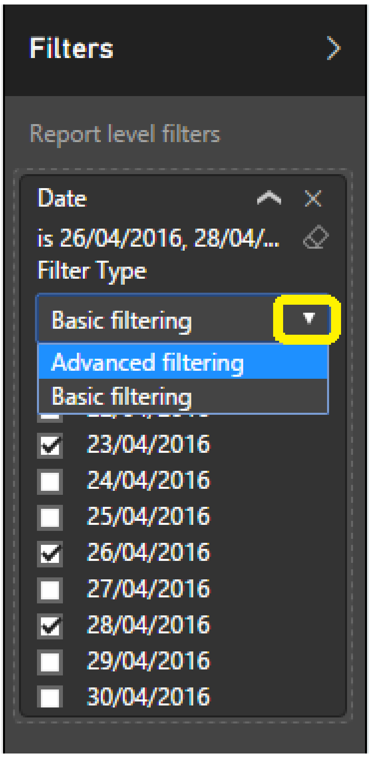
Step 2

Filters are set by default to **basic filtering**. To use basic filtering, click on the tick box next to each date you wish to include in your report.

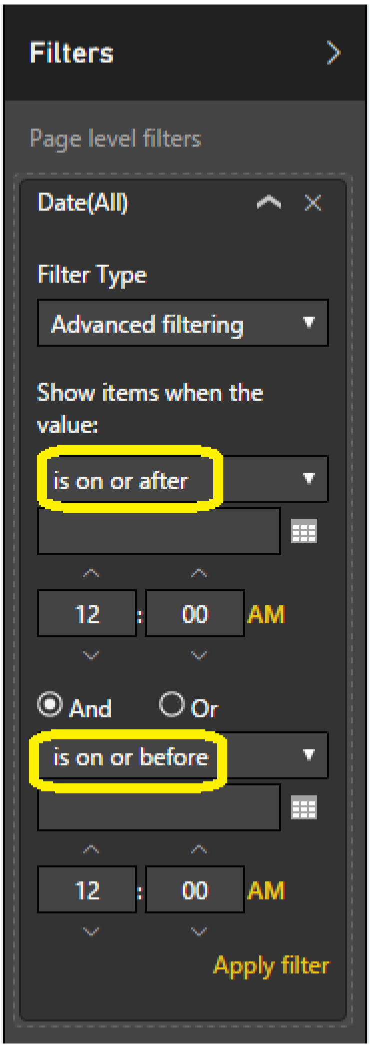
In the example below, your report would only include data for dates 23, 26 and 28 April 2016:



To change the setting to **advanced filtering** – select the down arrow on the dropdown list and select 'advanced filtering' as per the example below.



Advanced filtering allows you to filter information by specific parameters. In many cases, you will need to filter information by **date range**.



Your options for filtering dates include:

Is: means you want to include the one date you have entered in your report

Is not: means you don't want to include the date you have entered in your report

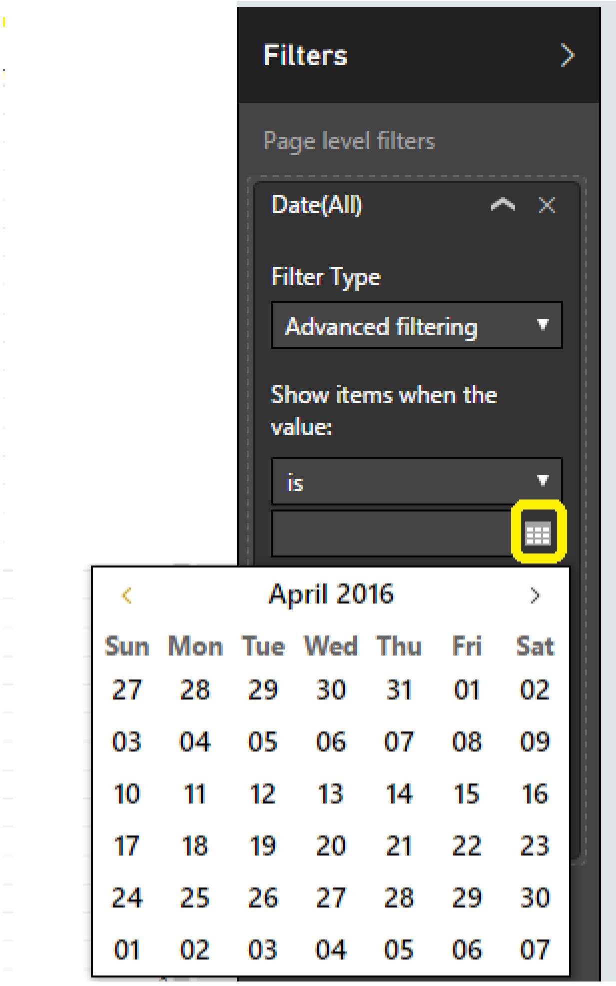
Is after: means you only want data after the date you have entered

Is on or after: means you only want data for the date you have entered and all dates after that date

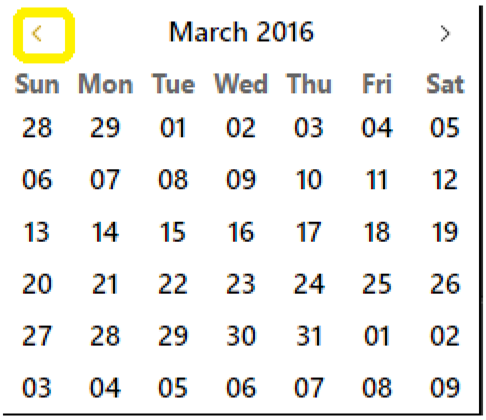
Is before: means you only want data before the date you have entered

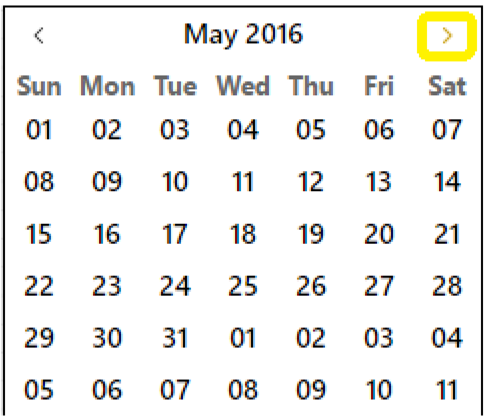
Is on or before: means you only want data for the date you have entered and all dates before that date

To choose your date range, select the **calendar** icon:

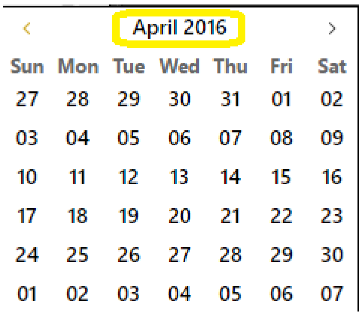


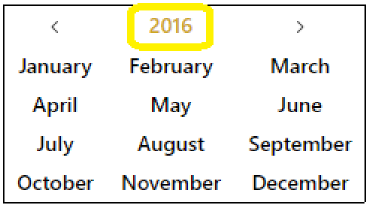
To move back a month select the **back arrow**, to move forward a month select the **forward arrow**:

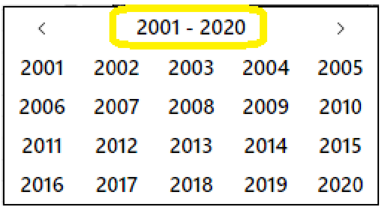




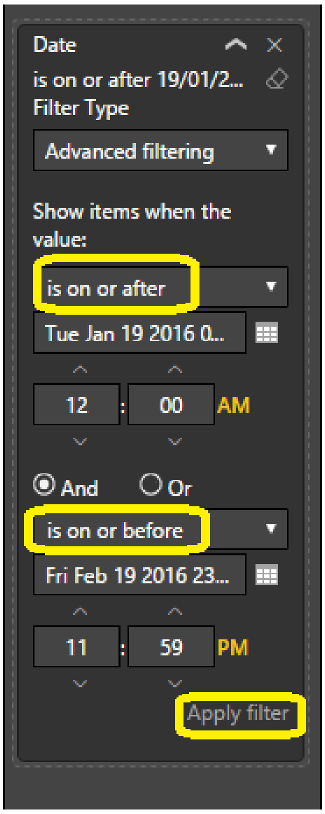
To select a different **year** or **decade** click on month/year at the top of the calendar:



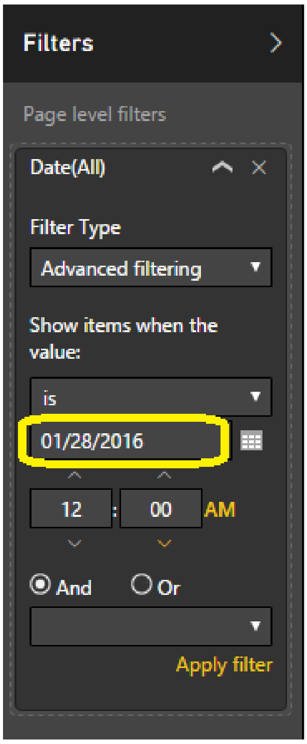




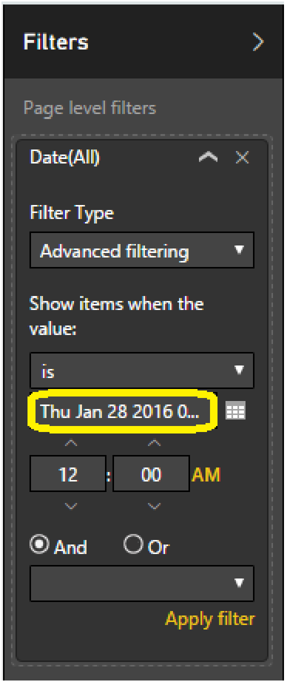
In the example below, the filters have been have been set to '**is on or after'** Tuesday 19 January 2016 and '**is on or before'** 19 February 2016, meaning the data date range will be 19 January – 19 February 2016 inclusive:



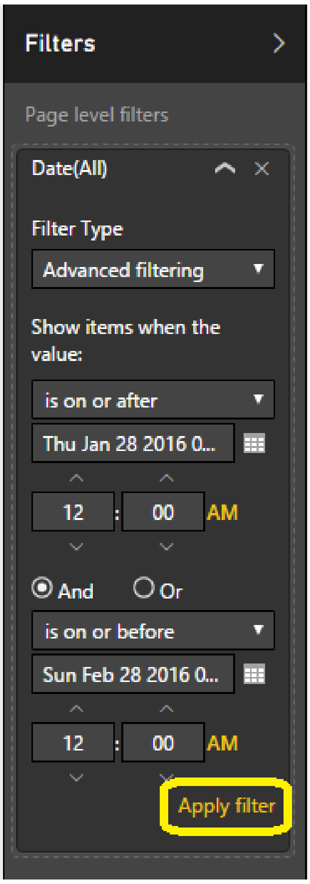
Alternatively, if you want to **free type** your date click on the box next to the calendar icon and type in the date in **American date order** month/day/year e.g. 01/28/2016.



The date will then automatically default **to written format** e.g. Thu Jan 28 2016 as per the example below:



Once you have set your **Show items when the value** filter and your **date range**, click **apply filter,** the date range you have selected will be applied to the data.



Can I filter other information in my report apart from the date range?

Yes, clicking on graphs in each report will open up other **filter types.** For further instructions on how to filter information in each report or information on the range of filter types available please contact the EDDI helpdesk.

Will my filtered information be downloaded in my report?

When you filter data in a report, it will be filtered to the same setting when you download it as a **.csv** file.

*E.g. 1 if you filter information in a report to only show accredited households at your agency, you will only see accredited household information in your .csv report when you press **Export Data**.*

*E.g. 2 if you filter a report to only show enquiries received by your agency 1-31 March 2016, you will only see enquiries received by your agency 1-31 March 2016 in your .csv report when you press **Export Data**.*

What reports are available in EDDI CMS?

1. **Carer - Household Exit Reason by Service**

Shows a count of total households that have exited or withdrawn broken down by service.

2. **Carer - Households Accredited in Period**

Shows the total number of households that have been accredited within each agency service. Use the filters to get a count of accreditation events within a specific date range.

3. **Carer - Enquiries by Month**

Shows a graph and count of total foster care enquiries per month for the organisation. Click the details tab to see the count, and use the filters to view data for a specific date range.

4. **Carer - Household Details**

A comprehensive group of reports showing the address, household details (including all household members) and accreditation preferences of household records. This report defaults to show accredited –vacant households. Use the filters to see things like emergency households only, or to get details of households in other phases.

5. **Carer - Household Mail Merge**

Used to export contacts for household members including home and email addresses, and phone numbers. Click into the report to use the filters to get specific data out of the system or use the export function to manipulate in excel.

6. **Carer - Household by Phase**

Count of households at each phase broken down by organisation service. Click the graph to drill down into each service or use the filters to select specific phases for the whole of organisation count.

7. **Carer - Planned Annual Review**

Shows the planned date of household annual reviews broken down by organisational service.

8. **Carer - Upcoming Checks**

Details of upcoming WWC, criminal and disqualified carer checks. Use the filters to check specific check types, statuses, date rangers and organisation service.

9. Carer - Households by Program

Shows a count of households at each phase broken down by organisation program.

10. Carer - Households by Service

Shows a count of households at each phase broken down by organisation service.

11. Carer - Households Exited in Period

Shows a count of households that have exited or withdrawn per organisation service. Use the filters to select a specific date range.

12. Carer - Households by Structure

Counts of household per structure type broken down by organisation service.

13. Carer - Post Accreditation Training

Details of post accreditation training events. Use the filters to select a specific date range.

14. Carer -Training Status by Service

Details of the date of planned and delivered training events broken down by organisation service. The default view shows events for households at training phase only. Adjust filters to show all events or specific phases.

15. Carer – Increased Number and Diversity of Carers

Increased number and diversity of carers shows count of enquiries by cultural background and ATSI status. Click the graph to filter by direct and indirect enquiry sources

16. Carer – Count of Carers that have Exited or Withdrawn

Count of carers that have exited or withdrawn broken down by exit reason and sub reason. Click the graph to filter the data into reasons/sub-reasons and use the filters to view totals for a specific date range

17. Carer - Days from Enquiry to Complete Major Event (All Events)

Shows your agency's average number of days across all household records between enquiry and the completion of all events (pre accreditation).

Drills down to the average number of days between initial enquiry and all completed events for each household record, and household member where applicable.

18. Carer - Days from Enquiry to Complete Major Event (Key Events)

Tracks the average number of days across your agency's household records between: enquiry and completion of initial enquiry form, enquiry and completion of training 1-8 event, enquiry and completion of assessment, enquiry and accreditation.

Agencies with multiple services/branches can see separate data for each service. To access this information, select the drill down button in the top left corner of the report.

19. Carer- Number of completed events per each main phase

Shows the number of enquiries that have progressed past initial enquiry, to training, to assessment, and to accreditation.

Useful for knowing the main stages at which households are withdrawing prior to accreditation.

Useful for identifying how many enquiries convert to accredited carers.

What other useful information is available in EDDI?

1. Household Record Timeline

The household record timeline gives you a visual timeline for each household record summarising their events completed toward accreditation.

To access a household record's timeline, open a household record in the **Carer** module. You will see a **timeline** heading in menu bar at the top of the page. Click on the timeline heading and a pop up box will open on your screen showing the timeline for that household record.

2. Carer Audit Module

The Carer Audit Module identifies updates and changes made to an EDDI household record by date and the worker responsible. Please read the **Carer Audit Module Manual** available on the Information for Agencies page of the Fostering Connections website for further information.

If you have any further questions or need support, contact the EDDI helpdesk on 1300 807 041 or eddi@mackillop.org.au