CPOMS System User Guide

CPOMS Systems Limited

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Table of Contents

Welcome to CPOMS

1 Using CPOMS for the first time

When we set up your CPOMS system, we are provided with a list of all staff names and email addresses, which is the information we need to create each user log in.

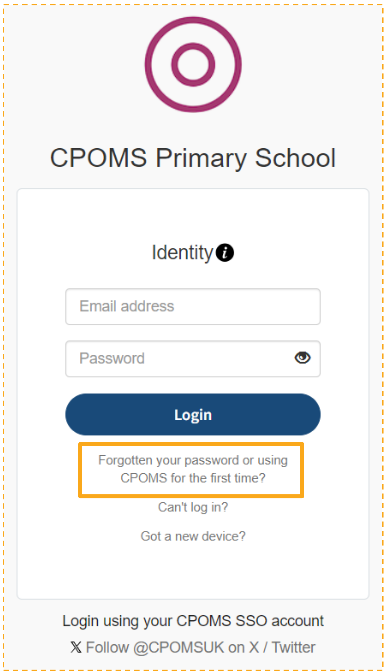
The system works on a user group basis, which allows us to ensure that each user has the correct amount of access to certain information.

Firstly every user needs to set their own password.

To ensure that all users change their password to something that is personal and secure, we do not provide you with a password to begin with.

To create your first password please **visit your school's CPOMS URL.** This can be found at the top of your 'Welcome to CPOMS' email *(sent to the main contact only)*.

Click on the **'Forgotten your password or using CPOMS for the first time?'** option *(beneath the 'Login' button).*



When prompted, input the email address which was supplied to us and click **'Reset Password'.** This will then send you a unique hyperlink, *to that email address*, which will enable you to create your first CPOMS password.

*Please note, <u>the reset password link **expires at midnight** on the day it was sent,</u> so should be generated on the day you are going to log in to CPOMS.*

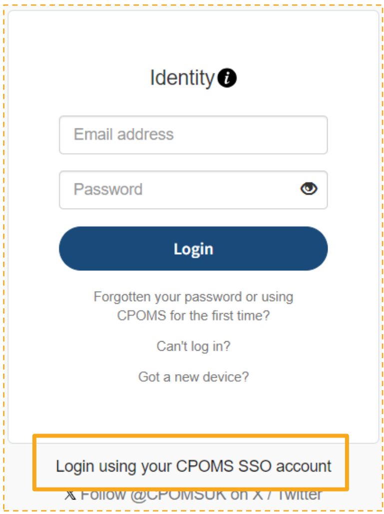
*Therefore, when starting to use CPOMS, we recommend that you **share your CPOMS url (web address) with users** and advise them to **click on the 'Forgotten your password or using CPOMS for the first time?' option themselves**, to avoid the link expiring.*

*If you receive the error message **'the email address you entered does not exist'** when trying to reset your password, then it is likely that we have a different email address assigned to your account, or that your account has not yet been created.*

*In this case, please contact your CPOMS Administrator in school to check this, within the CPOMS **'Admin'** area > **'Users'** tab.*

1.1 'Identity' or 'SSO'?

<u>Some</u> schools will have an additional option on their CPOMS log-in page for **'Login using your CPOMS SSO account'**. *(See screenshot)*



Users who have access to multiple schools, or who also use CPOMS StaffSafe, can request a **'Single Sign On'** (SSO) account.

A SSO account allows you to maintain one email, password and key, to gain access to multiple CPOMS sites without having to sign out. You simply switch between schools using a drop-down menu.

On request, you can also choose to amend the alert email address for each of your SSO schools so that the relevant CPOMS alerts go to the relevant school email address, if required.

If you have been set up with a 'SSO' account:-

- ✓ *When resetting your password please choose the **'Authentication Provider'** > **'CPOMS SSO'***
- ✓ *When logging in to CPOMS for the first time, select the **'Login using your CPOMS SSO account'** option, before entering your email address and password. Once selected, your internet browser should remember this setting in future.*

Users who have access to one CPOMS system will have a 'Identity' account:-

- ✓ *When resetting your password please choose the **'Authentication Provider'** > **'CPOMS Identity'***
- ✗ ***Do not** select the 'Login using your CPOMS SSO account' option. Please remain on the **'Identity'** sign in page which is the default.*

Please note, only schools with users who have access to multiple CPOMS sites will see these options.

1.2 How do I get an SSO account?

In order to create a 'SSO' account for you, you must already be a user on each schools CPOMS system, with your preferred email address. Once this is arranged, please send us a request via the **'Contact Support'** option, which is available within the **'Support'** section of CPOMS. Please include the name and post code for all schools you require access to.

2 Key User - Full System Access

2.1 Logging in

Higher level access users also require a 'Key', as well as entering their email address and password. This may be a **'Soft Key'** using the **CPOMS Authenticator App**, or a **physical USB key** *(available to purchase on request, for those who are unable to use the app only).*

Each key acts as the third element of security in CPOMS.

You will only ever be granted full access to the system when using the correct email address, password and key code.

2.2 'Soft Key' using the CPOMS Authenticator App

The app (Soft Key) works in much the same way as the latest revisions of Internet Banking in that it generates an ever changing 6-digit security code (to use alongside your email and password) to enable higher level access to CPOMS.

The app must be downloaded to an iOS or Android tablet/ smartphone device but can be used to log in to CPOMS on all internet enabled devices, including your laptop/ PC – the app simply provides the passcode to input.

To log in using your Soft Key, firstly enter your email address, password and click **'Login'**.

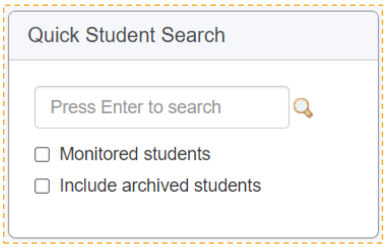
Next, when prompted open up your CPOMS Authenticator app and press **'Approve'**. If the approve option does not appear, *or you do not have access to the internet on the app device*, you can also manually type in the 6-digit number instead.

If you have not setup a 'Soft Key' please click here for the instructions.

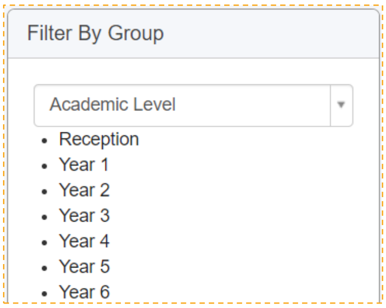
3 Higher Level Dashboard

The Higher Level Dashboard displays a range of different search options, to the right side of the screen.

- The **'Quick Student Search'** box will find any part of any pupil name and present you with a corresponding list.
- Beneath the 'Quick Student Search', is the **'Monitored Students'** check box which will produce a list of all the pupils who are currently being monitored under any of the categories that you have access to.
  - *A pupil becomes monitored automatically when they have had an incident added to their profile by a staff member, or when they have been manually monitored from within the student overview.*
- As well as **'Include Archived Students'**, which will allow you to do any of the two previous searches and include any pupils who have now left the school, e.g. the last year 6 or 11 class.



- You can also **'Filter by Group'** to produce a full class register, and a note will appear next to their name of any categories pupils within that class are currently monitored under.



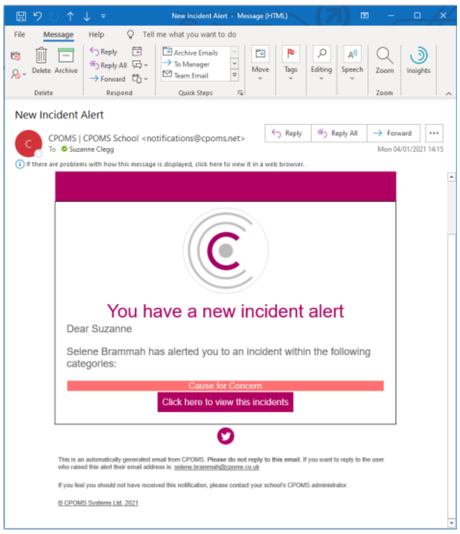
- Lastly, you can **filter by a specific category** to see who is currently monitored under the chosen category name.

4 Viewing an incident

In the middle of the dashboard is the **'Alert'** section. If you have been alerted to an incident or action these will be listed when you log in, along with any reminders you have set.

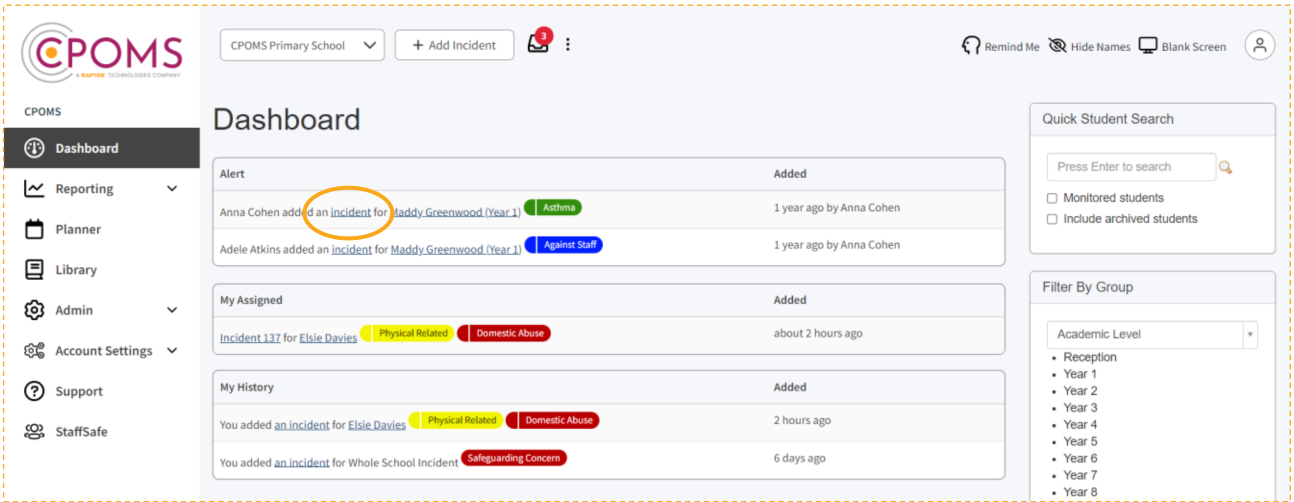
If you have been sent any alerts at all, you will also receive an email to your school email address *(or the one which we have been given)* to make you aware of the fact that you have been sent an alert by a member of staff in school.

The email will tell you who has created the alert and which category it falls under but <u>no other information</u>. It will then give you a link to your CPOMS login page to view the content in full.



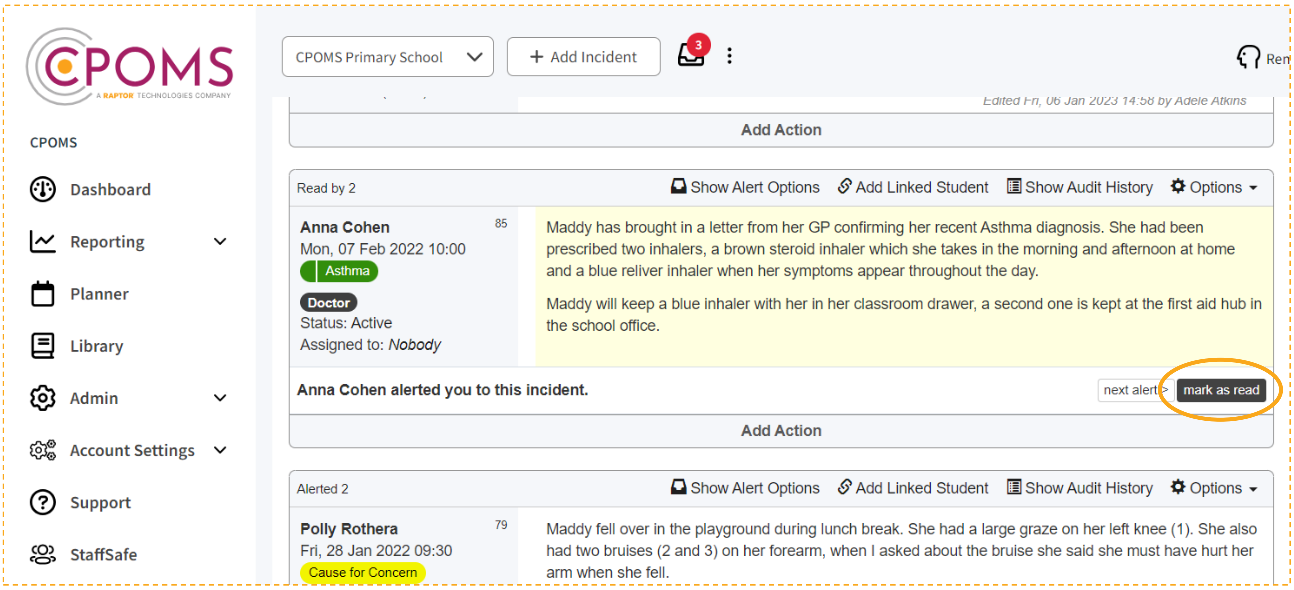
Once logged into the dashboard you will see your list of alerts. It will again tell you which member of staff has alerted you, which student the alert is about, the category(s) the incident falls under and when the incident alert was created.

If you now click on the word **'<u>Incident</u>'** you will be taken directly to view the incident, highlighted in yellow.



With full access you are able to see more than the singular incident to which you have been alerted.

If you have access to every category, you will see every incident registered in the system for this particular student.



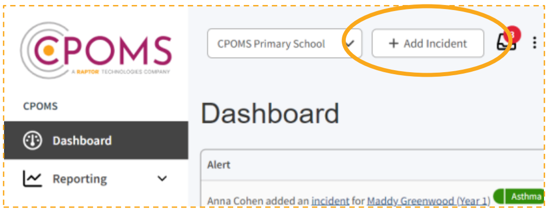
Once you have read the incident, you can then **mark as read** to acknowledge that you have seen the incident and understand the content. Once you mark an incident as read, it will remove the alert from your dashboard alerts section.

The incident will then filter into the student's incident log at the appropriate *point e.g. if it is the most recent, it will be at the top*. If an incident has been backdated it will filter in below any others that are more recent.

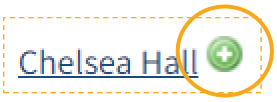
5 Adding an Incident

There are several different ways to add a new incident to CPOMS with full access.

The new incident form can be found by selecting **‘Add Incident’**, to the top-left side of your CPOMS dashboard.



Or, if you locate the name of the student, following any of the search methods explained earlier. Once you have the name, you will notice that next to each pupil’s name in the search screens there is a green ‘+’ sign. You can click on this to add a new incident to this student.

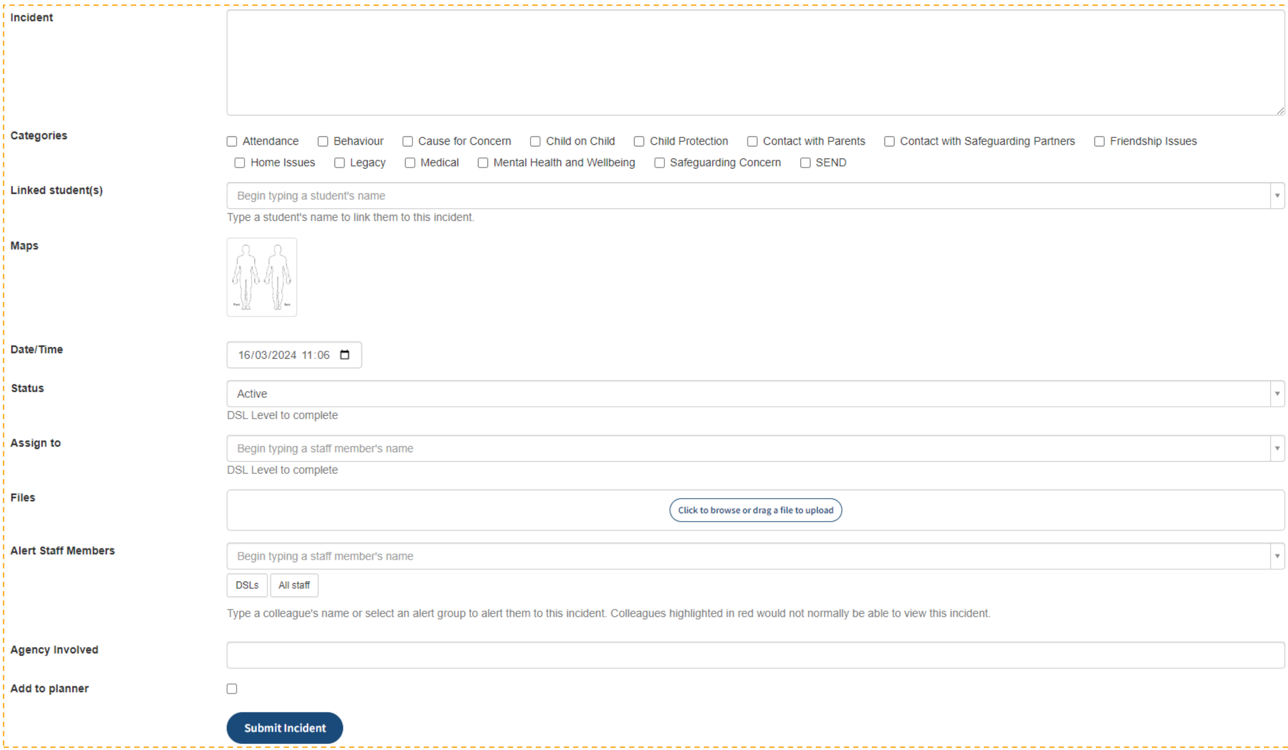


You will also find another **‘New incident’** button within the **‘Incidents’** tab of each individual student’s profile.

To access a student’s profile, click on the student’s name following a search and select the second **‘Incidents’** tab. The ‘**New incident’** button is at the top right-hand side of the page.

You will then be taken to the ‘Add Incident’ form, where you can fill in all of the details about the incident.

Add Incident Form (Key Holder)



Incident

Fill in the **'Incident'** text box with all of the details about the incident which you are adding. This is a free text box so you can add as much or as little as needed. Be careful to be **accurate** and **specific.**

Hide Names Feature

When inputting any linked student names into the incident text box, please ensure that you spell their name ***identically*** *to how it is spelt within your MIS. This ensures that if you do need to use the 'Hide Names' feature when reporting in the future, their name will be detected and blanked out.*

If a student mentioned in the incident text will ***not*** *be linked into the incident their name will not automatically be picked up by the 'Hide Names' feature should you need to use it.*

If recommended by your LA/Safeguarding Advisor ***or*** *you have followed our 'People Involved' custom field guidance, on use of initials, you may use their initials instead as well as terms such as mum/ dad/ brother/ sister within the incident text.*

If you do choose to use initials in your incident/ action text, please click here to see our suggestion for a 'People Involved' custom field where you can record their full name.

Categories

Once you have filled in all of the details about the incident, you need to select at least one category to assign it to. If there is an overlap you may select more than one.

Linked student(s)
You can then choose to link in other students if more than one is involved in a particular incident. This will copy the incident to all pupils selected. You can also click to monitor the linked student under the same category(s) if necessary and choose whether to share any documents you attach to the incident to their profile(s) as well.

Maps
The 'Maps' feature allows you to apply numbered markers to a map image to support your incident text. This will default to our 'Body Map'.

> ***More about Maps***
>
> *If required, you can choose to disable our default 'Body Map' image and upload your own.*
>
> *You can also add additional maps i.e. a location map of the school layout, or a face/ hand/ foot map to allow you to apply more accurate marker points to the image.*
>
> *For further information, click here.*

Date/Time
Following this you can select a date and time. These will both default to the current date and time, however if you wish to change it to when the incident actually occurred you can do so here.

Status
You may set the 'Status' of the incident to 'Active' or 'Closed'. *This field can be reported on, so you are able to view 'Active' incidents only for example.*

Assign to
You may also assign an incident to a specific staff member *(Key Holders Only)* if you or they will be dealing with it, by selecting their name in the 'Assign to' field. The user will then receive an email notification to alert them to this and the incident will appear in the 'My Assigned' area of their dashboard until the incident status changes to 'Closed'. *This field can be reported on, so you are able to view incidents assigned to a specific staff member, or 'unassigned' incidents.*

Files
If you would like to attach a file/ document to support the incident *e.g. a social services letter, previous school case notes, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add, or drag a file from one of your folders into the area to upload.

Alert Staff Members
Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively, you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

Agency Involved
You can also add any agency names to the incident to make others aware of which agencies are involved with this incident/ pupil.

Add to Planner

For any reminders, tick 'Add to planner' and fill in your reminder details. This is useful if you wish to follow something up or want to have a month by month view of the incident's progression.

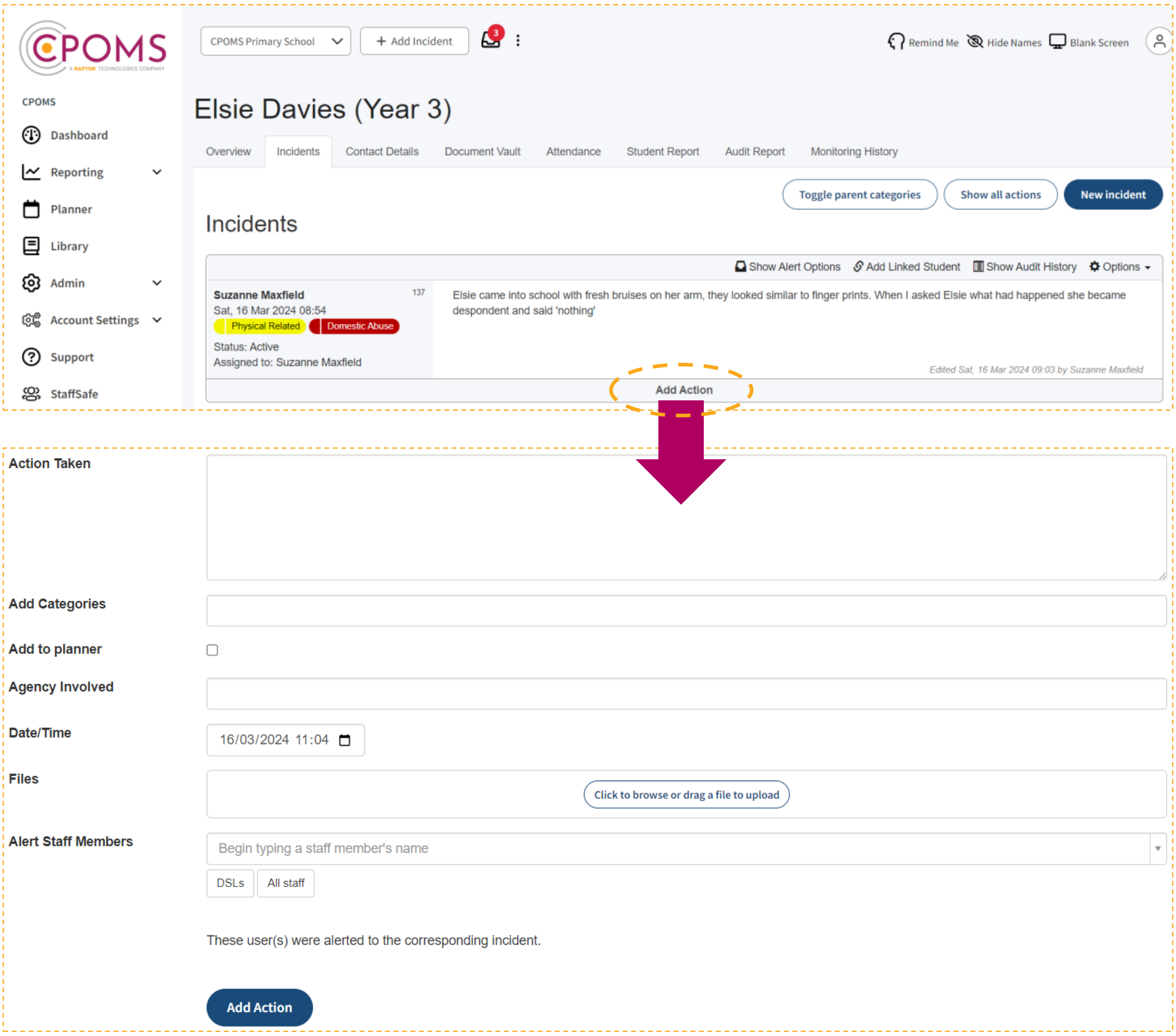
Once all of the above has been done, you must select the **'Add Incident'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added incident.

> ***Agencies and Categories***
>
> *Your Agency and Category lists were compiled by the school during the implementation stages.*
>
> *If you would like to add any more agencies, and/ or categories you can do so within your CPOMS **'Admin'** area. (Admin Key Holders Only)*

6 Adding an Action

Once you have added or read an incident and dealt with it, you can then log an action. This is very similar to the incident logging and you can choose to alert other staff in the same manner. You can then make sure that there is a clear trail of what has been done, by whom and when. This ensures that everyone alerted has an up-to-date knowledge of what is happening with that student/ incident.

Add Action Form (Key Holder)



Action Taken

Firstly fill in the free text box with all of the information needed about the action taken. This could be a referral made, telephone call or meeting arranged, for example.

Add Categories

If required, you can add additional categories to the action which will be displayed against the original incident. Handy if it was categorised incorrectly or needs to be elevated to 'Child Protection', for example.

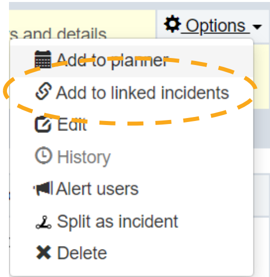
Add to planner

For any reminders, tick 'Add to planner' and fill in your reminder details. This is useful if you wish to follow something up e.g. to review in 1 weeks time or to input the date of the next meeting for example.

Add action to linked students

If you would like the action to be copied to the linked students profile, click on the tick box to 'Add action to linked students' next and 'Share documents?' if necessary.

***Tip** - If you or another user forgets to tick 'Add action to linked students' and submit the action, you are able to share the action to the linked student's incident in the future by clicking on **'Options'** to the top-right hand corner of the action and selecting **'Add to linked incidents'**.*



Agency Involved

You can also add any agency names to the action to make others aware of which agencies are involved with this action/ pupil.

Date/ Time

Select the date and time you wish to record, if it is different to the current.

Files

If you would like to attach a file/ document to support the incident *e.g. a social services letter, email, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add or drag a file from one of your folders into the area to upload.

Alert Staff Members

Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

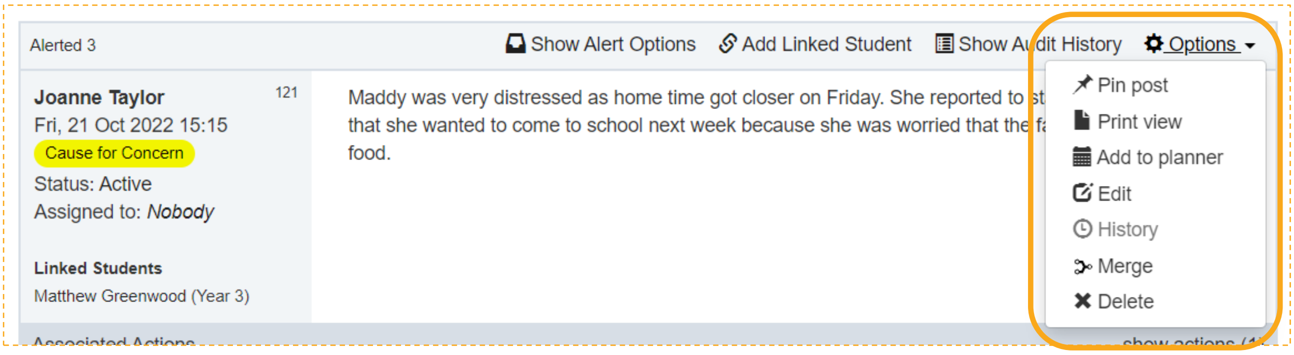
Or you may click 'Add incident alert recipients' to alert the same staff members who were alerted to the original incident.

Once all of the above has been done, you must select the **'Add Action'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added action.

7 Editable Incidents and Actions

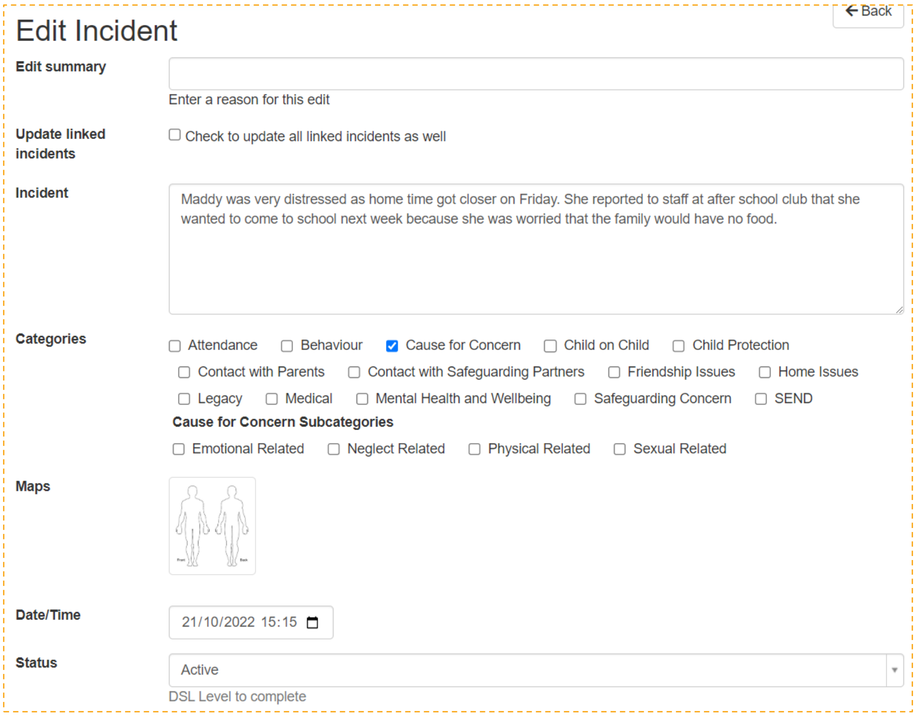
Admin Key Holders can choose to edit and remove both incidents and actions within CPOMS. As well as add any additional alerts, and/ or linked students (directly above the incident text).

The 'Edit' and 'Delete' features are available within each child's profile > 'Incidents' tab, to the top right-hand corner of each individual incident, under **'Options'**.

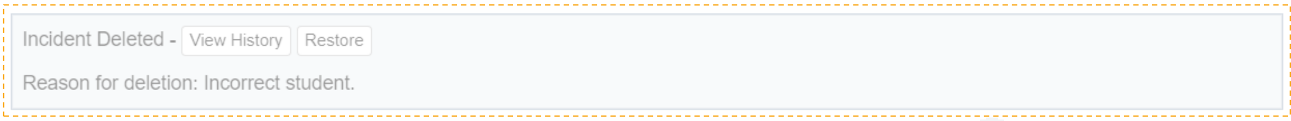


If you choose to edit or delete an incident, CPOMS will keep all previous versions of the incident in its change log so that nothing is ever lost. You can view any amendments made within the incidents 'History' *(under 'Options').*

Only CPOMS Key Holders who are a member of a User Group with the 'Edit incidents' permission will be able to access these controls.



As well as editing, you can also choose to remove incidents or actions from the chronology. For all other users, it will appear as though the incident or action never existed, but those with the 'Edit Incident' permission will be able to see a deleted marker in its place in the chronology, with the option to 'View History' or 'Restore' it, as well as view the reason for deletion.



Under **<u>'Options'</u>** you can also choose to print off a singular incident by clicking 'Print view'. This will generate a PDF document of that incident only with any associated actions, which you can then choose to print or save electronically.

You can **'Add to planner'** here to set any further reminders relating to the incident or action.

Pin Post

*Important incidents can be pinned to appear at the top of the student's chronology ('Incidents' tab). Simply locate the incident and click '<u>Options</u>' to the top right-hand corner and **'Pin Post'.***

7.1 Merging Incidents

If an incident has been added to CPOMS multiple times by different staff members, you may merge it into one incident. If you choose to 'merge' an incident, it will become an 'action' beneath the incident you choose to merge it with.

To do this, simply locate the incident that you would like to merge with and take note of the Incident ID Number. *This is the small number located to the right of the staff members name who logged the incident. This incident will become the main incident once merged.*

Next, locate the other incident that you would like to merge with. *This incident will become an action beneath the other incident.* Click on **'Options'**, to the top right-hand corner of the incident and select **'Merge'.** Input the Incident ID Number, of the incident you would like to merge with, and click **'Search'**. You will then see a preview of the incident. If you are happy to merge following this, click on **'Merge'** again.

7.2 Split as Incident

If an action is added to an incident and you feel it should be an incident in its own right, you are able to click on 'Split as Incident' which will add it to the system as an incident instead.

Simply locate the action and click on **'Options'**, to the top right-hand corner of the action, and select **'Split as Incident'**. When prompted, select the category(s) that the incident should be assigned to, if different, and click **'Split'** again.

It will then appear in the student's profile in their 'Incidents' tab, in date order.

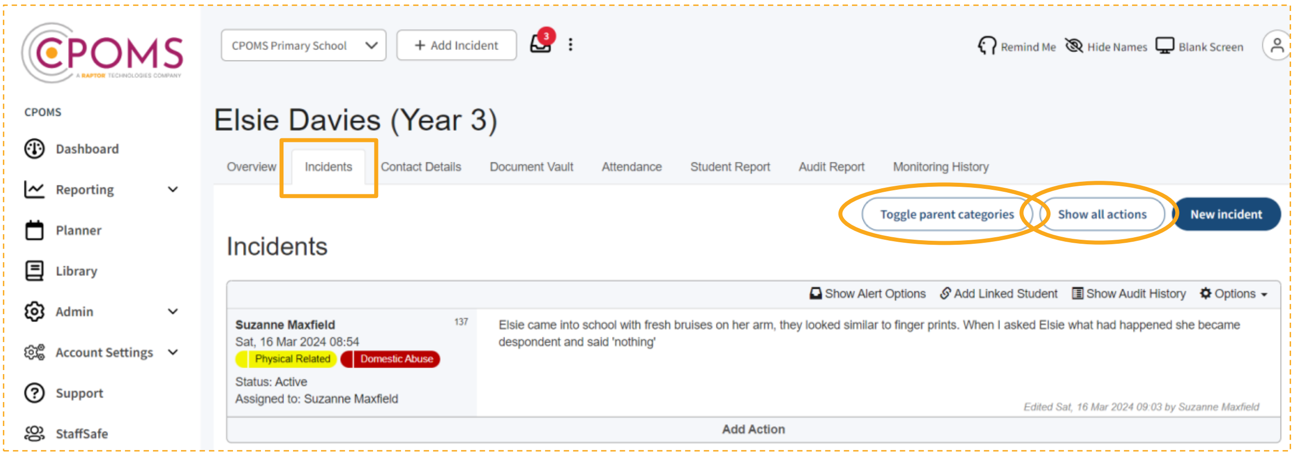
8 Student Information

Once you have submitted an incident, you will be taken back to the student's whole incident log, and the incident which you have just added will be highlighted in yellow.

This page is the student's entire incident log. If you have access to all of the categories in CPOMS, you will be able to see every record held for that particular student.

The incidents will be listed chronologically from the oldest at the bottom to the newest. You can select to open all actions associated with each incident at once by clicking **'Show all actions'** at the top of this page, or alternatively select to open the actions associated with each individual incident as you read them.

By selecting the **'Toggle parent categories'** it will show you both the parent and sub-category assigned to each incident. *The system will default to show you just the sub-category.*



At the top of the page you will see several different tabs. These all hold different information about the student.

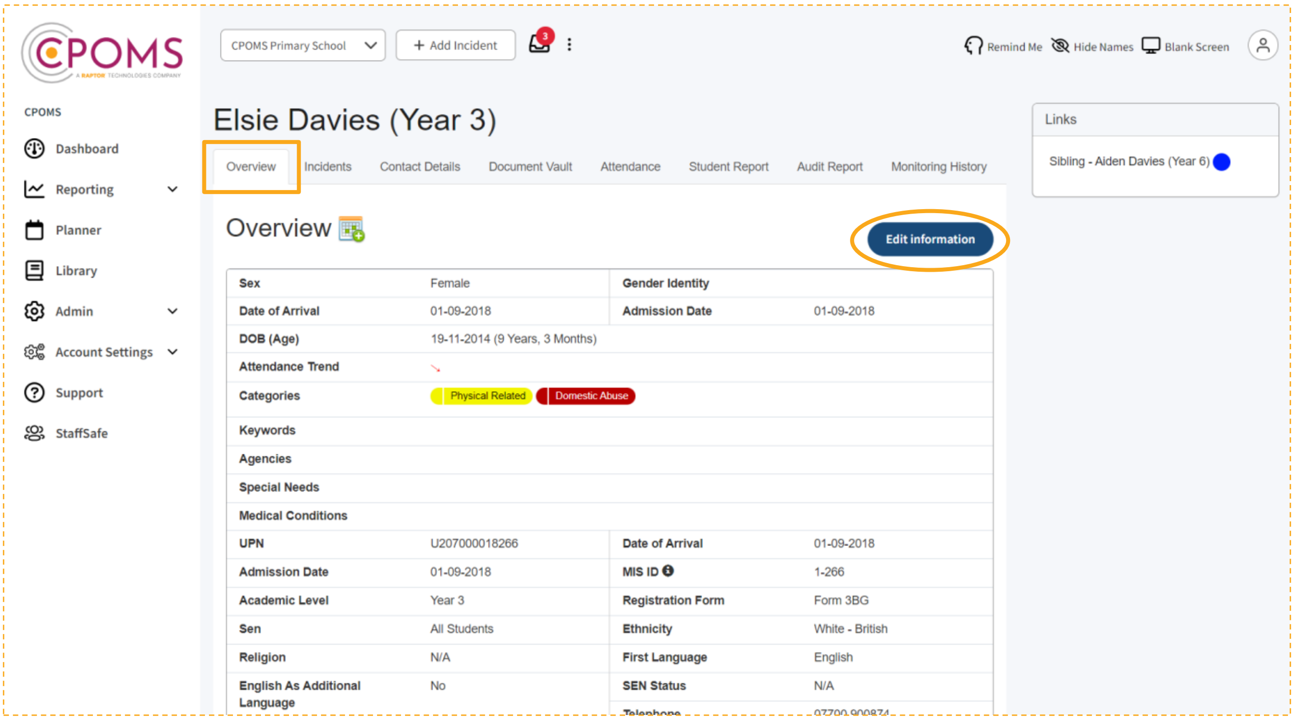
8.1 Student Overview

If you click on the **Overview** tab, you will see all of the basic information about that child such as their D.O.B, Gender, SEN status, Medical Conditions etc.

All of this information is imported from your MIS system, and as such any new information which is added or updated within your MIS will be imported into CPOMS by the following day.

Combined maps will show you your CPOMS map image(s). If you click on a map you will be able to see any placed markers, from the students various incidents, combined. Any related incidents will be listed to the right-hand side, and when hovered over, will highlight the markers related to that incident in green.

There is also an **'Incidents by category'** pie chart which shows a break down of all incidents logged, by category for that pupil. As well as a timeline diagram which shows you the incidents logged over a period of time, handy for noticing any patterns that are forming or an improvement once an intervention has been put into place.



By clicking on the **'Edit information'** button, to the right-hand side of this tab, you can also do the following:-

Alerts

At the top of this page, you can choose who you would like to receive automatic alerts about this student, if required. Simply type in part of their name in the 'Alert Staff Members' field and select it.

Links

Under 'Links' you can see any linked students for this child, i.e. siblings, as per your MIS. You may also add links of your own manually here, *which are not picked up by your MIS*, for friends, cousins or neighbours etc.

Monitoring Options

- **Summary**

  The 'Summary' field allows you to add a summary line which will appear at the top of the students overview on save. This could be their Social Worker's details, or a note regarding the student for example.

- **Categories**

  Here you can manually monitor a student for a certain category by ticking the category name, or likewise un-monitor a student for a certain category if it is no longer required by un-ticking the category name.

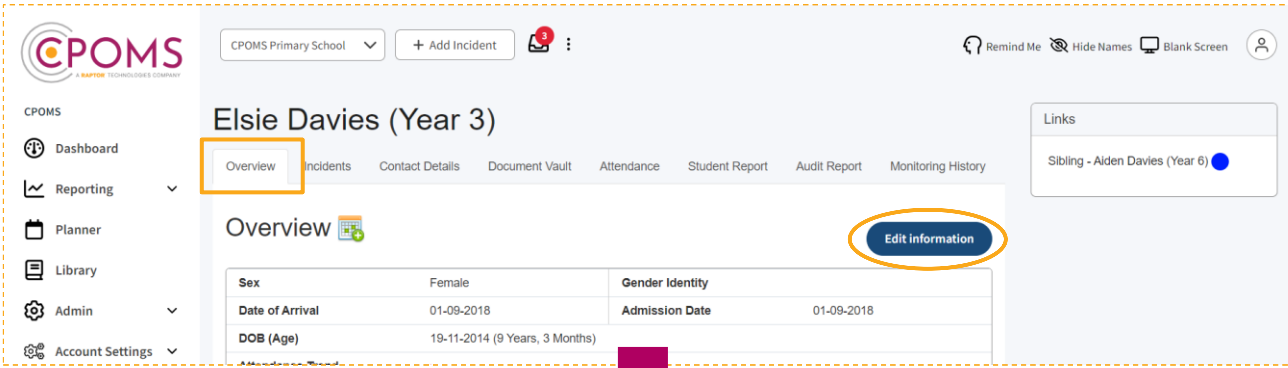
- **Keywords**

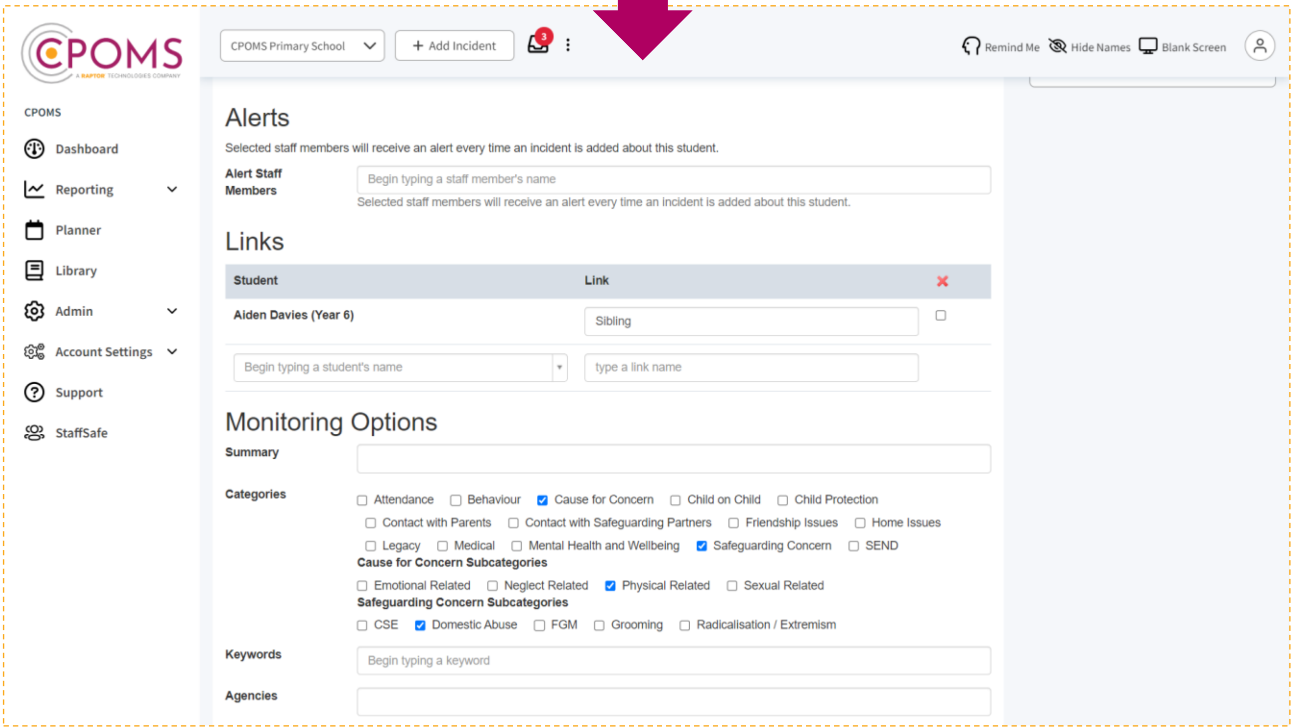
  You may add keywords for this student here i.e. allergy, wears glasses etc. which you can then search by later.

- **Agencies**

  Here you can manually flag up agency involvement by clicking on the field and selecting from the drop-down list, or likewise remove their involvement if it is no longer required by clicking the 'x'.

Once you have made any changes here, please click **'Update Student'** to save.


CPOMS
CPOMS Primary School
+ Add Incident
Remind Me
Hide Names
Blank Screen
CPOMS
Dashboard
Reporting
Planner
Library
Admin
Account Settings
Elsie Davies (Year 3)
Overview
Incidents
Contact Details
Document Vault
Attendance
Student Report
Audit Report
Monitoring History
Links
Sibling - Aiden Davies (Year 6)
Overview
Edit information
Sex
Female
Gender Identity
Date of Arrival
01-09-2018
Admission Date
01-09-2018
DOB (Age)
19-11-2014 (9 Years, 3 Months)


CPOMS
CPOMS Primary School
+ Add Incident
Remind Me
Hide Names
Blank Screen
CPOMS
Dashboard
Reporting
Planner
Library
Admin
Account Settings
Support
StaffSafe
Alerts
Selected staff members will receive an alert every time an incident is added about this student.
Alert Staff Members
Begin typing a staff member's name
Selected staff members will receive an alert every time an incident is added about this student.
Links
Student
Link
Aiden Davies (Year 6)
Sibling
Begin typing a student's name
type a link name
Monitoring Options
Summary
Categories
Attendance
Behaviour
Cause for Concern
Child on Child
Child Protection
Contact with Parents
Contact with Safeguarding Partners
Friendship Issues
Home Issues
Legacy
Medical
Mental Health and Wellbeing
Safeguarding Concern
SEND
Cause for Concern Subcategories
Emotional Related
Neglect Related
Physical Related
Sexual Related
Safeguarding Concern Subcategories
CSE
Domestic Abuse
FGM
Grooming
Radicalisation / Extremism
Keywords
Begin typing a keyword
Agencies

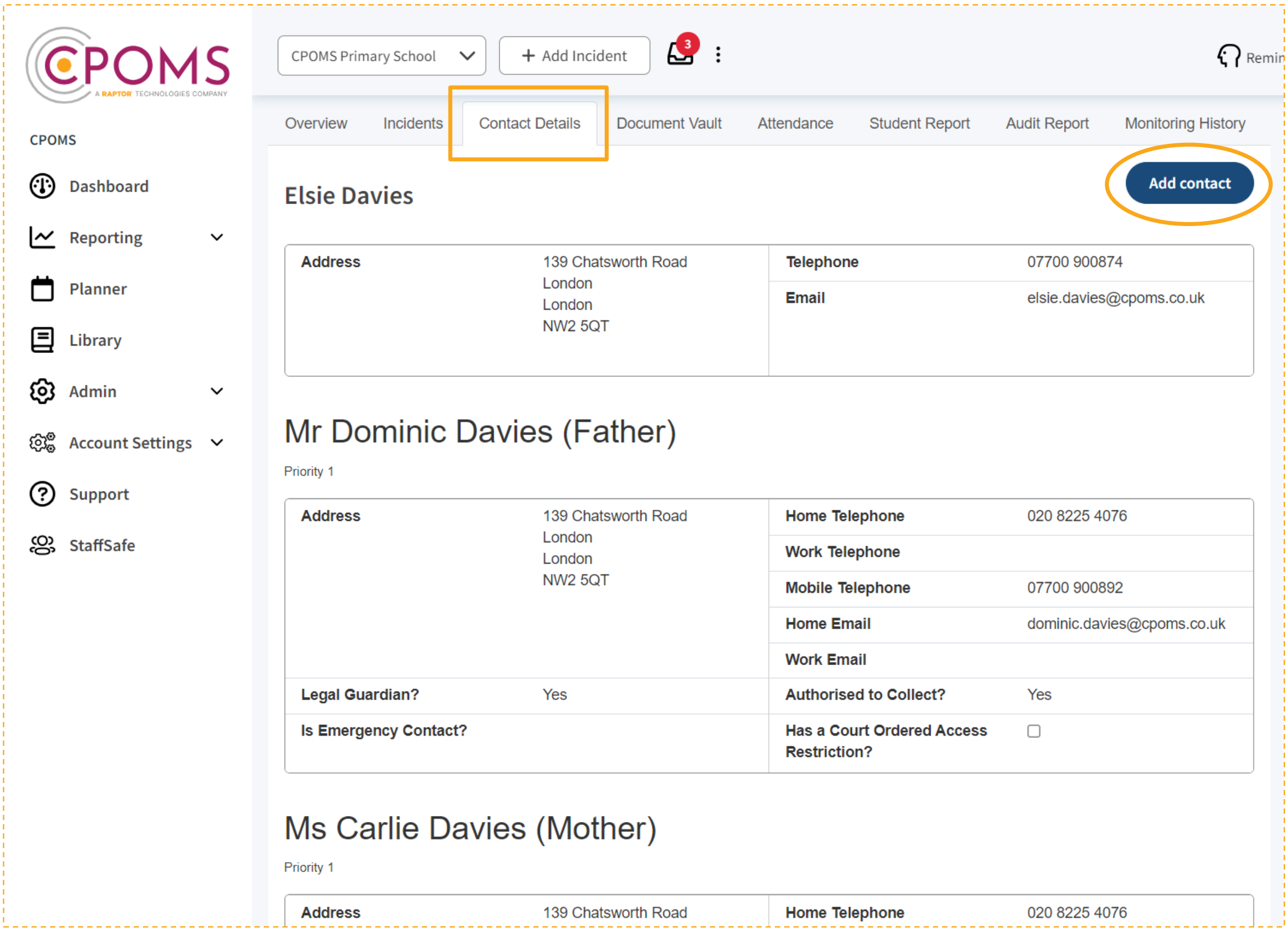
8.2 Incidents

The second tab is the **Incidents** tab which we have already seen in detail, this is where you will find the student's full chronology, and the 'New incident' button.

8.3 Contact Details

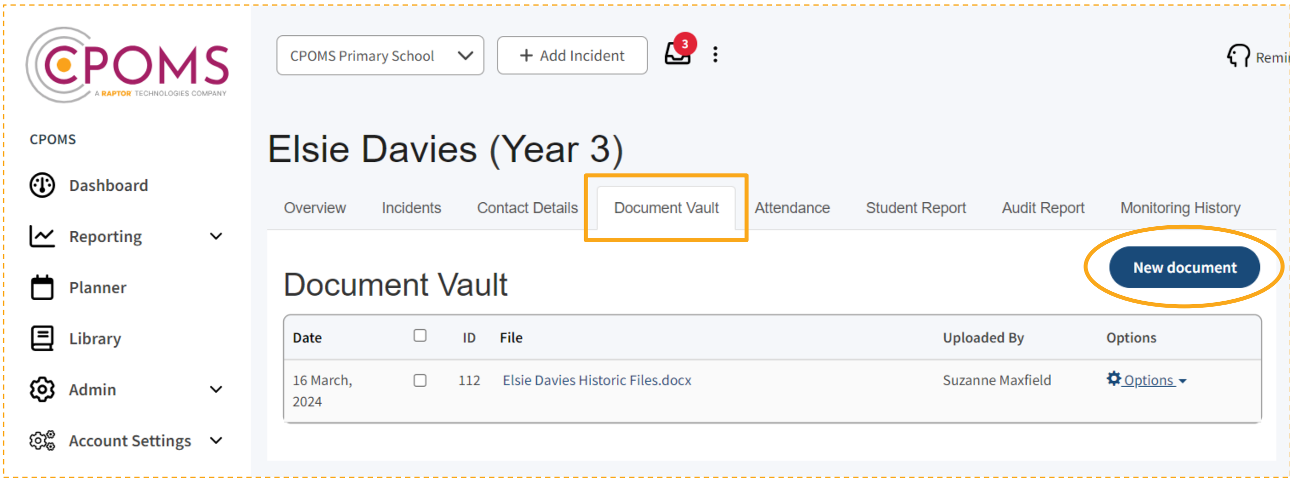
This holds the main contact details for each pupil.

You may also add any additional contacts directly to CPOMS, *i.e. the student's assigned Social Worker*, using the **'Add contact'** button in the top right-hand corner.



8.4 Document Vault

The **Document Vault** is the fourth tab along and can hold any type of document which you may wish to upload to CPOMS. Once a document is uploaded to CPOMS it is encrypted so it is highly secure.



Documents which were added to an incident/ action will also be listed here *(if you have access to the category that they were assigned to)* with a link to view the original incident/ action.

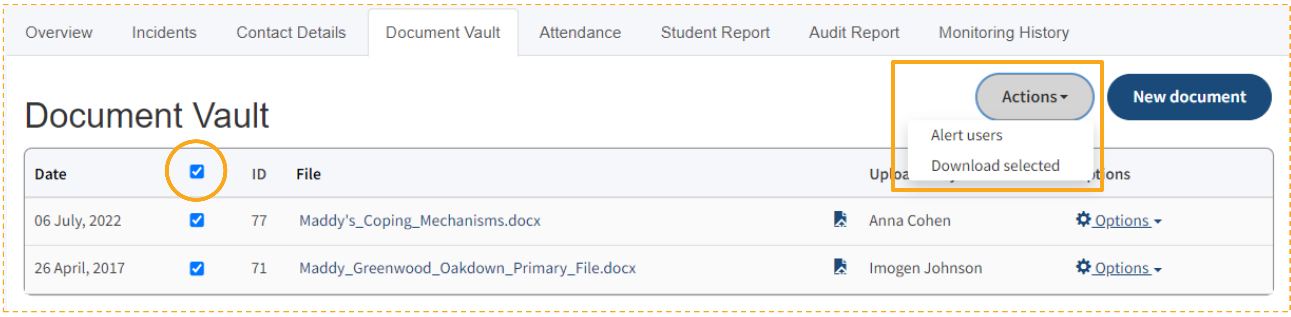
If you add a document directly to this area you can also choose to alert staff to the fact that it has been added, under **'Options'** > **'Alert users'**.

*Please note, documents added directly to the student's document vault can be accessed by **all key holders** who have access to the student. We do not recommend that you add any sensitive or confidential files directly to the vault.*

*To restrict access to documents, please make sure that they are uploaded to a **category protected incident or action**. This way only key holders with access to the category and student will have access to the file.*

If required, you can choose to download all documents associated with a student into a zip file here.

Simply 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'.**



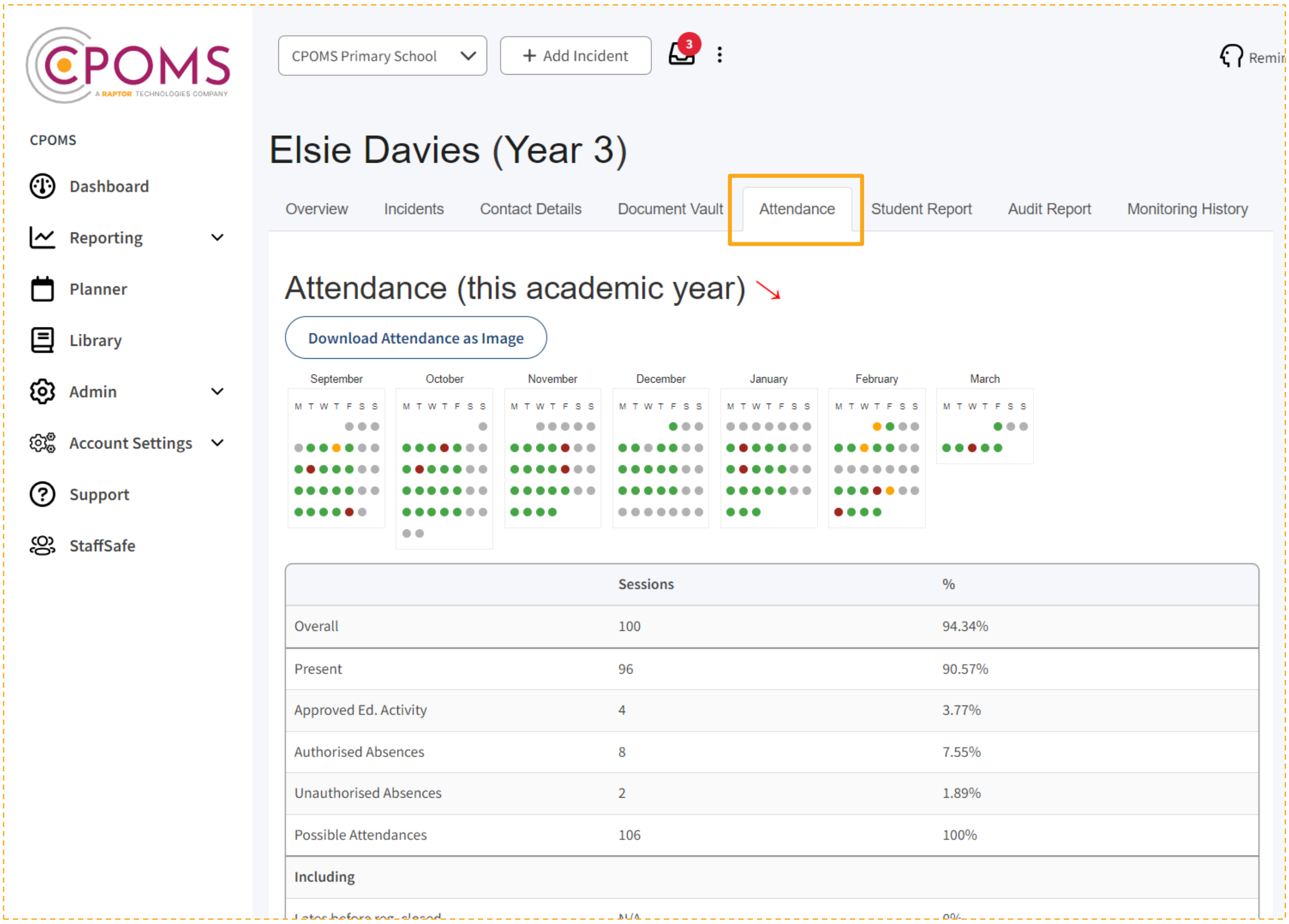
This will create a zip file containing all of the selected documents. The zip file usually appears to the bottom left of your internet browser for quick access and is usually saved in the 'Downloads' folder of the machine you are on (depending on your individual machine settings).

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

8.5 Attendance

The fifth tab is **Attendance**. This holds the basic attendance data for the student and will be up-to-date as of the previous day.

It will also show present and absent marks over time in a calendar format, handy for spotting any patterns that are forming.



8.6 Student Report

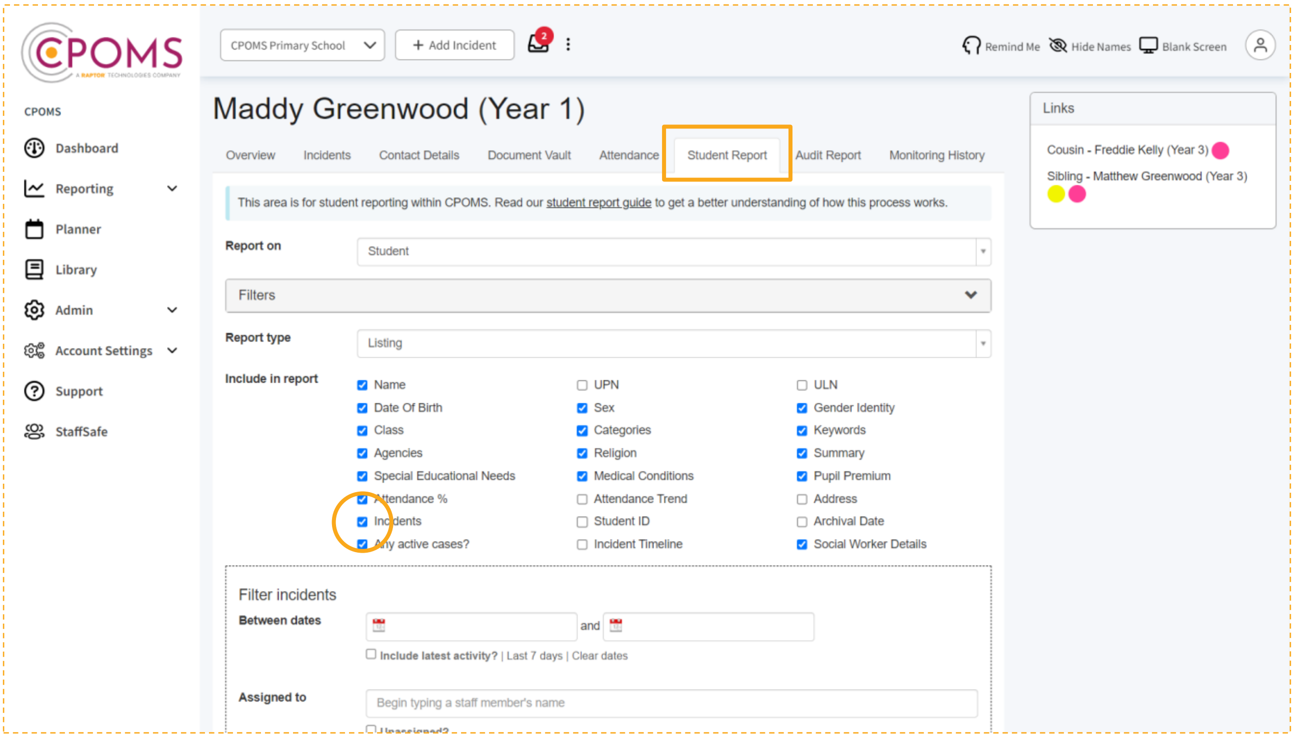
Tab six is the **Student Report** tab which allows you to report on all of the information held within the system for this particular student. The report will include the student's basic data at the top (*which you can filter out if required, using the 'include in report' tick boxes).*

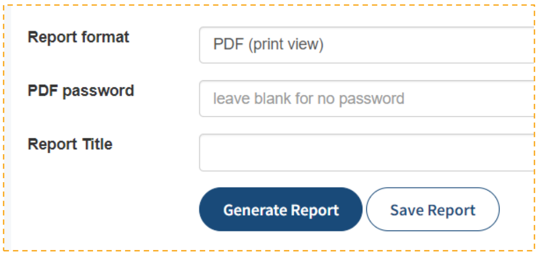
8.7 How do I run a full student report/ chronology?

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. You may also wish to choose to **Hide Student and/ or Staff Names** in the report.*
- For all records, please ignore the further filter options, or you may apply specific dates or select certain categories within the 'Filter incidents' options.
- 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.

You can run all reports within CPOMS in 'Enquiry View' to view the report on screen, or 'PDF (Print View)' to create a printable PDF copy.



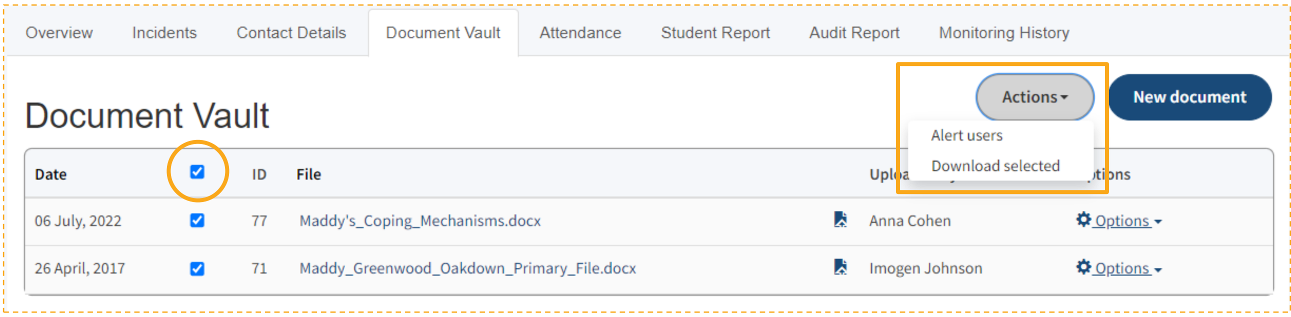


8.8 How do I download the student's documents/ files?

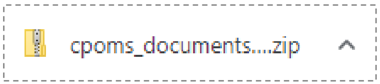
Once you have run the student report, you may wish to download the student's documents/ files as well.

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'.**



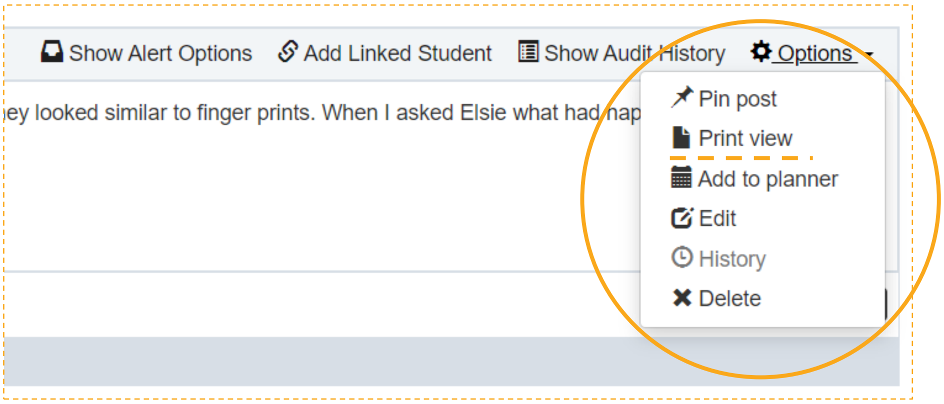
This will create a zip file containing all of the selected documents. The zip file usually appears to the bottom left of your internet browser for quick access and is usually saved in the 'Downloads' folder of the machine you are on (depending on your individual machine settings).



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

8.9 Printing a single incident

To print off a singular incident, locate the incident within the student's profile, **'Incidents'** tab, click on **'Options',** *in the top right-hand corner of the individual incident,* and select **' Print View'**. This will generate a PDF document of that incident only and any associated actions, which you can then choose to print or save electronically.



8.10 Hiding Names in a Student Report

When you are running the 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 **not** hide shortened/ mis-spelled versions of the names if used, or the names of any other students who are not linked into the incident.*

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.

8.11 Audit Report

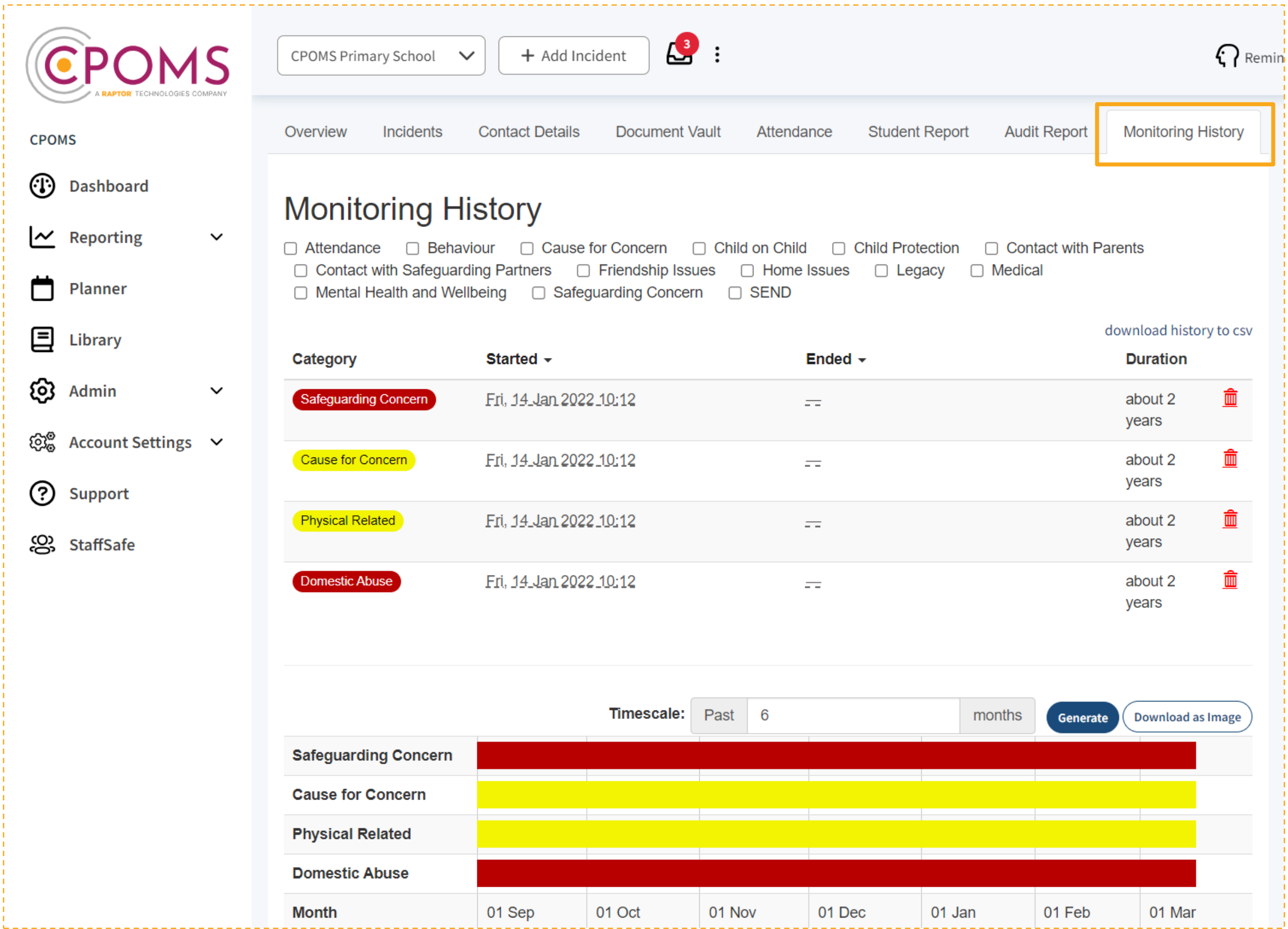
The **Audit Report** tab details all activity on the system for that particular student to refer to if needed.

8.12 Monitoring History

The final **Monitoring History** tab provides the date and time stamp of when the student became monitored, and un-monitored for the relevant categories.

This is also available in a timeline view where you can look back at the students monitoring history throughout their school life. This area is handy for noticing any patterns e.g. if perhaps the student has been on and off a certain category.

A student will automatically become monitored as new incidents are added by staff, you can also choose to monitor a student manually within their 'Overview' tab, by selecting the 'Edit Information' button (to the right-hand corner). From here you can simply tick the relevant category name(s) and scroll down to 'Update Student' to save.



Q: How to un-monitor a student

To un-monitor a student for a certain category, access their profile, *via the class list or the quick student search*, on their 'Overview' page, click on the **'Edit Information'** button. Scroll down the page to the 'Monitoring Options' area and simply un-tick the category(s) you would like to un-monitor them for, and 'Update Student'.

This is important to ensure your monitored student figures are accurate and up to date.

Q: How to monitor/ un-monitor in bulk for a certain category

To monitor or un-monitor a group of students for a certain category, from the main dashboard you can either click on your different category names (to the right-hand side, to see who is monitored for what), or you may click into a class list (i.e. a whole tutor group or year group).

Next, to the right-hand side of the screen (above the student names) you can select to **'Update Categories'**.

Once selected, a tick box will appear to the left of each student's name, tick the relevant students that you wish to monitor/ un-monitor and 'Continue'. You can then choose a category name and choose to either 'Add' or 'Remove' it from the selected students, as well as choose a start date, or if needed you may wipe all categories.

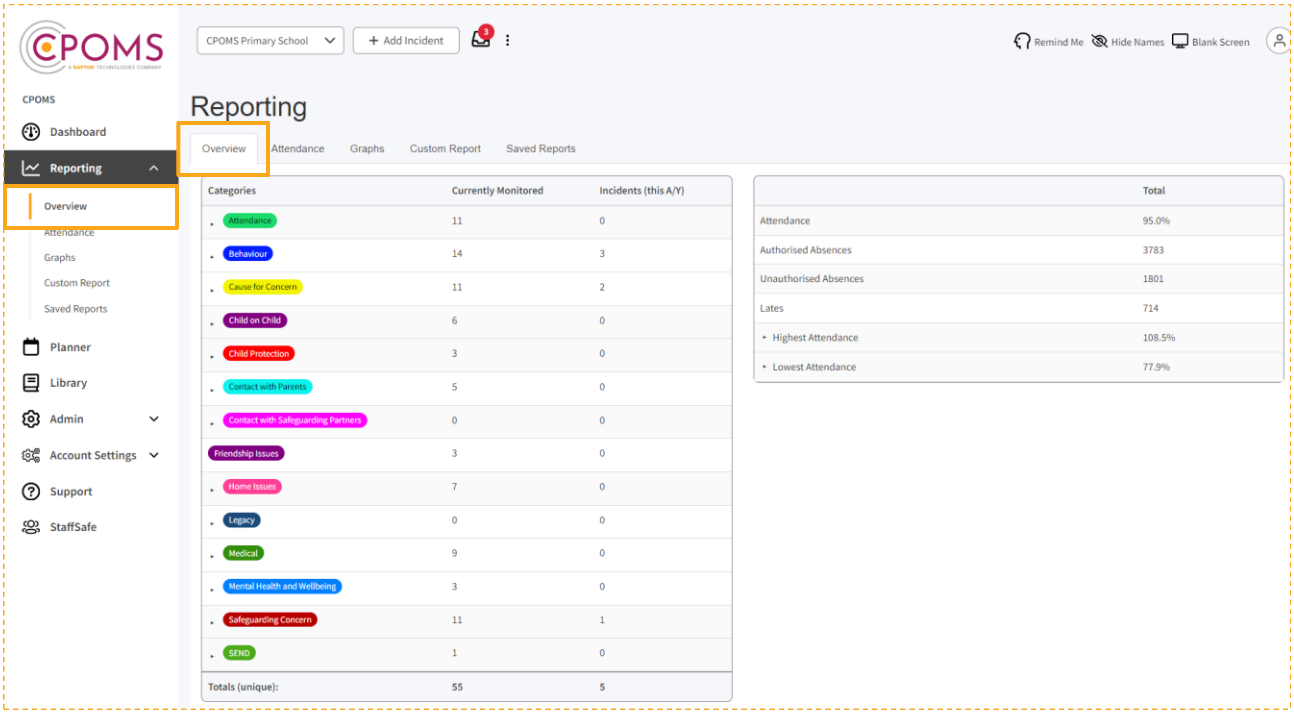
9 Reporting

The **Reporting** area, available in the left-hand navigation panel, allows you to report on much more information about multiple students.

9.1 Overview

The first tab of reporting presents you with an overview of your CPOMS, listing the total number of current monitored students and the total number of incidents logged in the system and under which categories <u>during the current academic year</u>.

To the right you will find your whole school attendance figures, as well as your highest and lowest attendees at the click of a button.

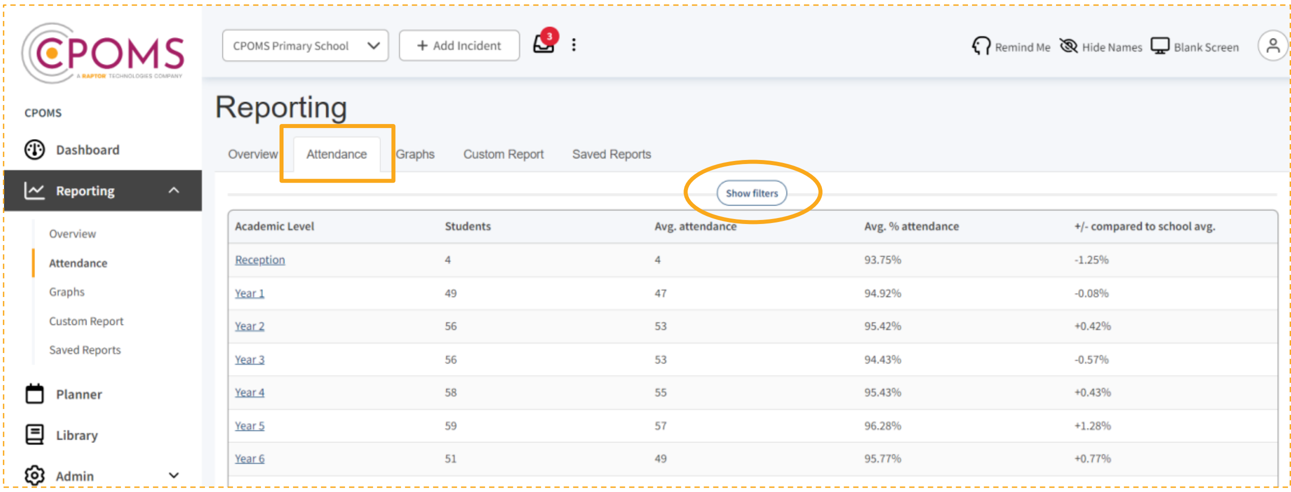


9.2 Attendance

The second tab along is the **Attendance** tab. This will break down your school attendance by class and show you how each different class attendance compares to the school average.

You can also click into a particular class to see a breakdown of attendance per student, sorted highest to lowest.

You may also choose to filter your attendance by many parameters by selecting the **'Show Filters'** option *(above the attendance table)*.

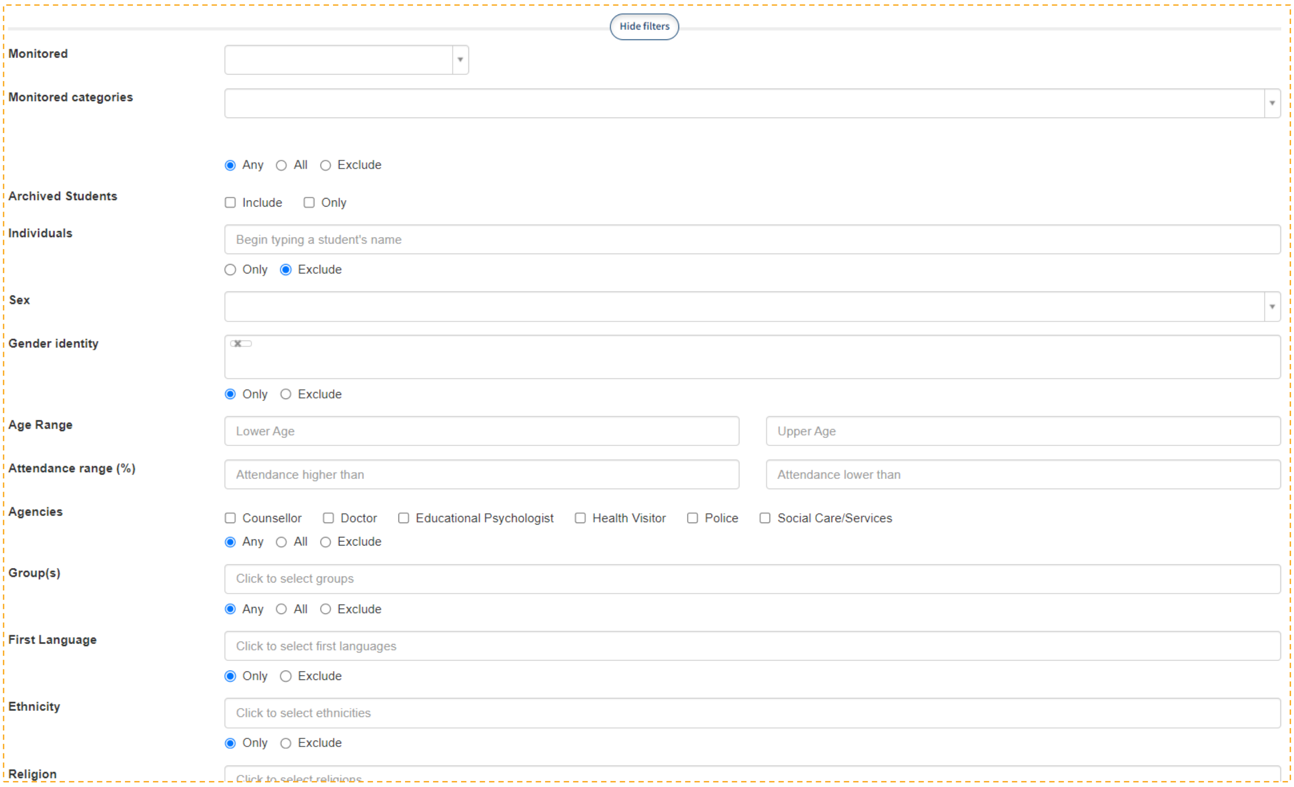


Academic Level	Students	Avg. attendance	Avg. % attendance	+/- compared to school avg.
Reception	4	4	93.75%	-1.25%
Year 1	49	47	94.92%	-0.08%
Year 2	56	53	95.42%	+0.42%
Year 3	56	53	94.43%	-0.57%
Year 4	58	55	95.43%	+0.43%
Year 5	59	57	96.28%	+1.28%
Year 6	51	49	95.77%	+0.77%

Using the filters, you may look at your 'Monitored' students attendance only – Now, Ever, or between a certain timeframe, or the attendance of those who are monitored for a particular category, e.g. your Child Protection children only.

Further filters include Pupil Premium, Religion, Age Range, SEN Status, Ethnicity, Gender, Year Group and many more.

This allows you to change certain aspects of your attendance to see how they impact upon current levels of attendance.



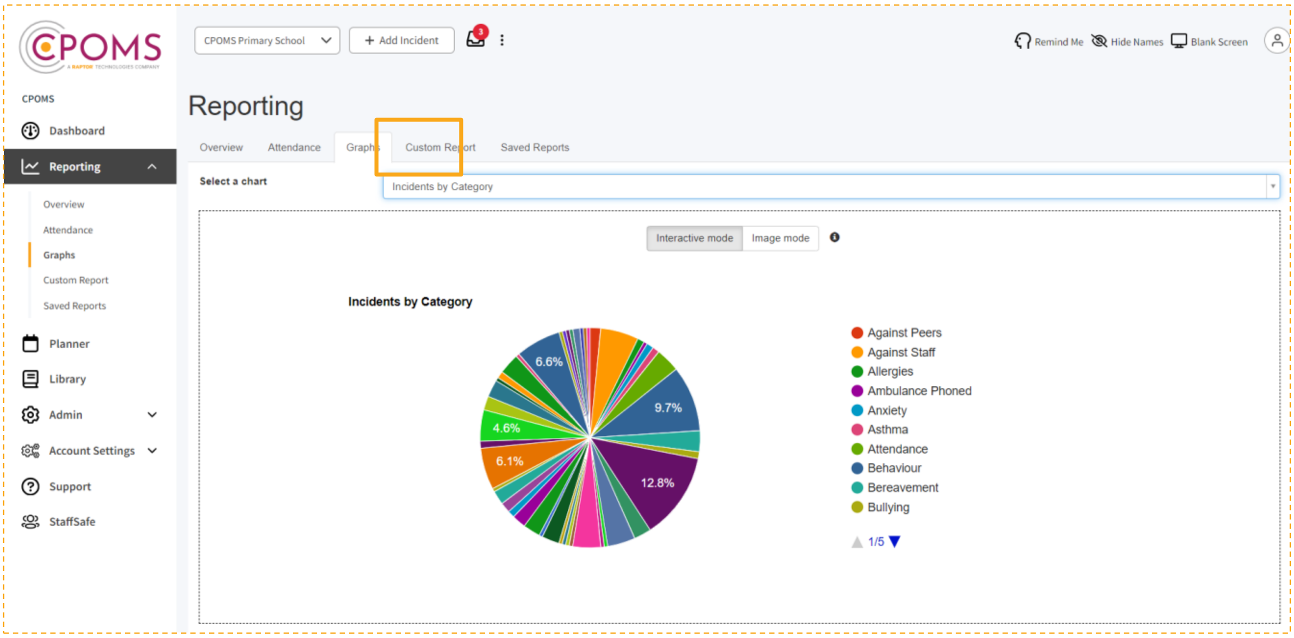
9.3 Graphs

The next tab in the Reporting section is **Graphs**. These are several different managerial graphs which you can look at and export to give you a more visual overview of information held in CPOMS.

The current graph capabilities are:-

- Absences by Class
- Incidents by Category
- Incidents by Month
- Monitored Students
- SEN Status
- Student Ethnicity
- Student Religion
- Unauthorised Absences
- Absence by Class Graph

Interactive mode allows you to hover over the chart to see specific values. **Image mode** allows you to save or copy the graph into another program by dragging it or right-clicking the image and 'save image as'.



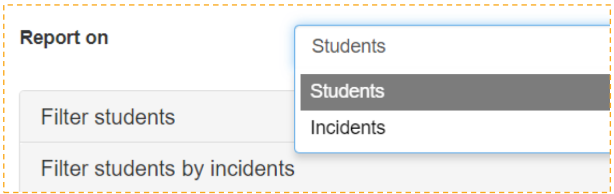
These graphs are only some of what we can do, if you can think of any more that may be useful to you please do not hesitate to let us know.

You may also create your own Graphs and Charts within the Custom Report section next.

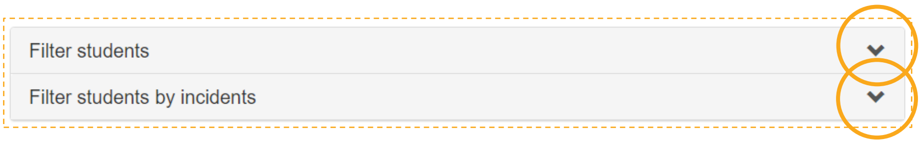
9.4 Custom Report

The **Custom Report** tab combines much of the tabs we have seen before all in the one place.

Firstly, you can choose what to report on at the top, **'Students'** or **'Incidents'**.



The **'Filter students'** and **'Filter incidents'** options can then be used to narrow down the results of the report so that you can drill down into specific areas that you are interested in, e.g. by Pupil Premium, Religion, Age Range, SEN Status, Ethnicity, Gender, Year Group and many more.



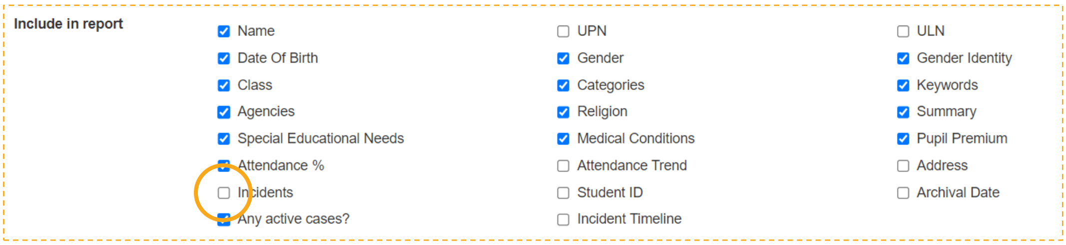
Under **'Report type'** you can then choose how you would like your results to be displayed:-

- **Listing -** Lists the results in 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 if you choose one.
- **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 -** A chart that combines two groupings on the same graph.

When **'Listing'** is selected for a Students report, you can choose what you would like to include about each student by ticking/ un-ticking the **'Include in report'** checkboxes.

When you tick to include 'Incidents,' here, you will receive extra options to only display particular kinds of incident. As with all the reporting options, if you select nothing at all, everything will be returned.



The summary report types are numerical and require you to group the results by some property so that they can be counted. If you choose two groupings, you will get multiple tables of results.

Redact words or phrases - if there is a particular word or phrase you wish to redact from the report, type it in this field and click on it to add. You may add multiple words and phrases here.

Order - choose how to order your report, alphabetically by surname or by age of the student.

Report Format

- **'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.

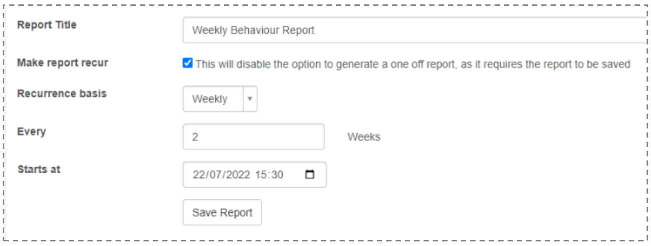
Report Title - if you wish to save a report for future use, simply enter a **'Report Title'** and choose **'Save Report'** when you are ready. This will save the report to your **'Saved Reports'** area, within **'Reporting'**.

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.*

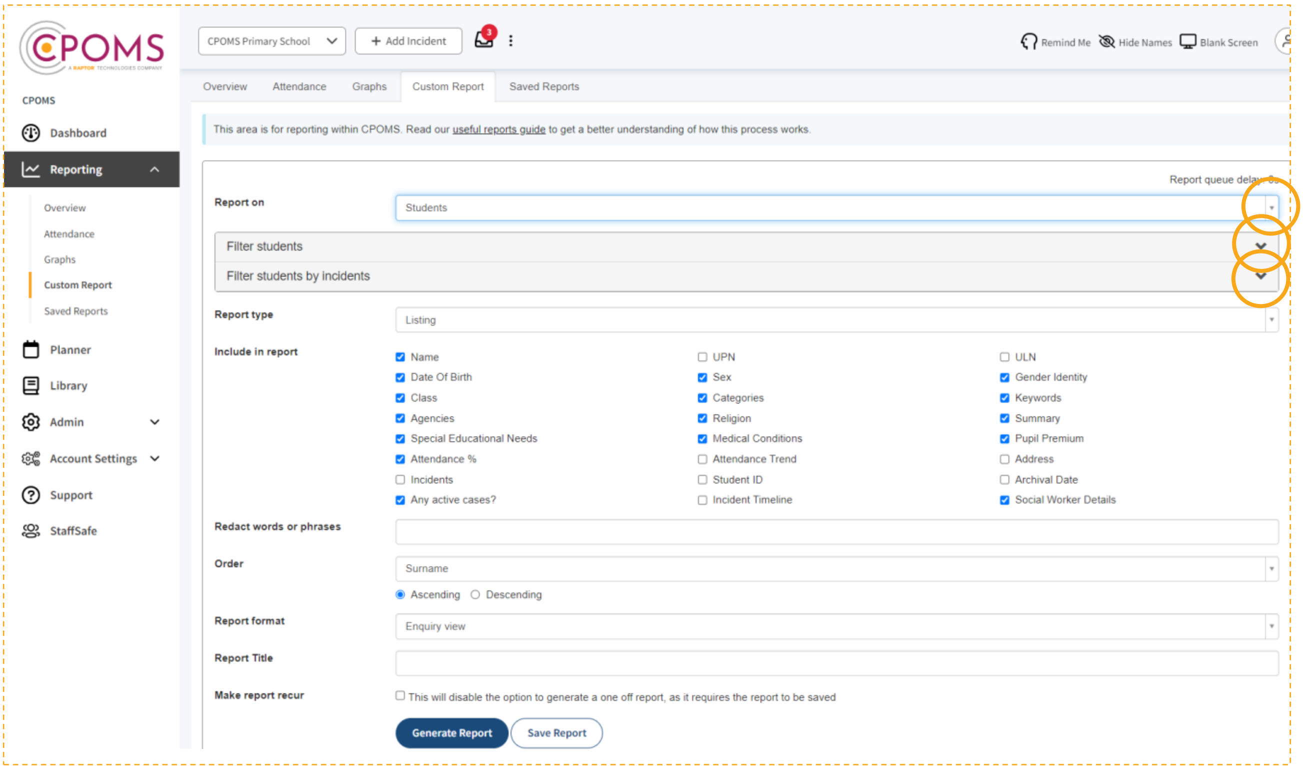
- ***Recurrence basis:** Select the recurrence basis i.e. Daily, Weekly, Monthly.*

- ***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.



Following feedback from our schools, this reporting tab has been designed to give you much more flexibility to manipulate the data stored in CPOMS for various purposes. For example, you may wish to know how many behaviour incidents each tutor group has had in a term, or look at pupil premium v attendance.

Q: How do I add our school logo to reports?

To add your school logo to appear in the header of PDF reports, firstly upload the school logo into your CPOMS 'Library' area, in your preferred size.

Next, navigate to your CPOMS 'Admin' area, selecting the 'Settings' tab. Scroll down to the 'School Logo', select the relevant logo here and click 'Update Settings'.

9.5 Saved Reports

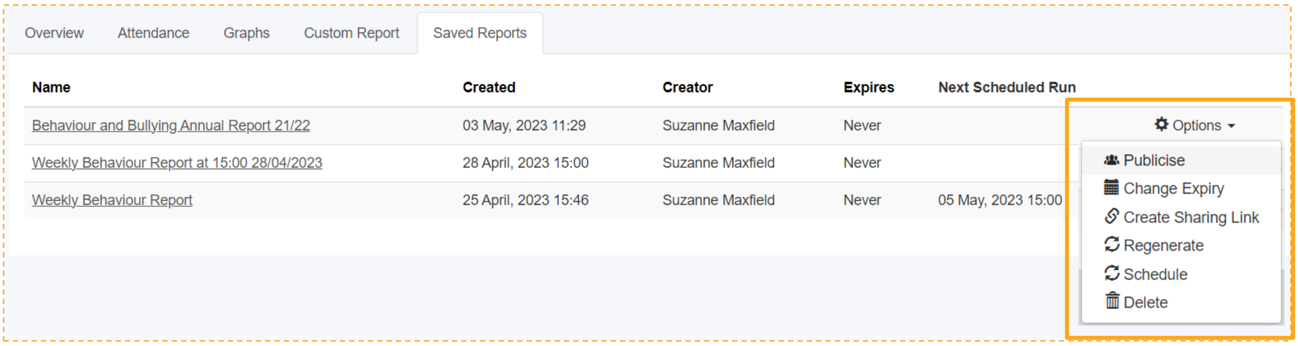
The **'Saved Reports'** tab will list any reports you have chosen to save previously. *You can save the filters used in a report for future use by inputting a 'Report Title' and selecting 'Save Report', when running a report in the 'Custom Report' tab.*

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. *If a report is made public and run by another Key Holder they will only see results for the categories/ classes that they have access to.*
- **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.


Overview
Attendance
Graphs
Custom Report
Saved Reports
Name
Created
Creator
Expires
Next Scheduled Run
Behaviour and Bullying Annual Report 21/22
03 May, 2023 11:29
Suzanne Maxfield
Never
Options
Weekly Behaviour Report at 15:00 28/04/2023
28 April, 2023 15:00
Suzanne Maxfield
Never
Weekly Behaviour Report
25 April, 2023 15:46
Suzanne Maxfield
Never
05 May, 2023 15:00
Publicise
Change Expiry
Create Sharing Link
Regenerate
Schedule
Delete

10 Useful Reports Guide

Individual Student Reports

10.1 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 **<u>'Include Linked Incidents'</u>** 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.

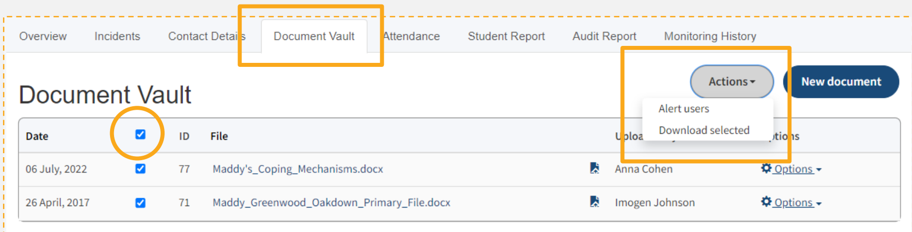
*If you would like to include any documents or files attached to any of the incidents/ actions, please go to the students **'Document Vault'** where you can download a copy.*

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'**.



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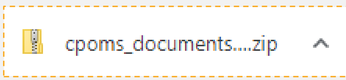


Please note, if the student has multiple pages of documents, you will need to follow the above instructions on each individual page.

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 **not** 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 both categories 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.

10.2 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. *Leave blank for all time.*
- 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 number of incidents 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.*

10.3 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. *Leave blank for all time.*
- 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 number of incidents logged against the student in question per category, during your selected time frame.

10.4 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. *Leave blank for all time.*
- *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'.**
- 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

10.5 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 number of incidents logged on the system during the date range selected. If you chose certain categories only, incidents logged against other categories will be excluded from the total.

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').*

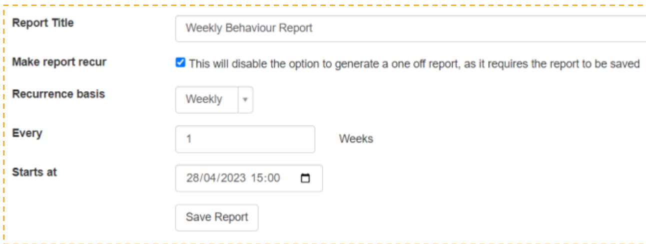
Saved reports can be found and easily regenerated in the 'Reporting' area > 'Saved Reports' tab.

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'**.*

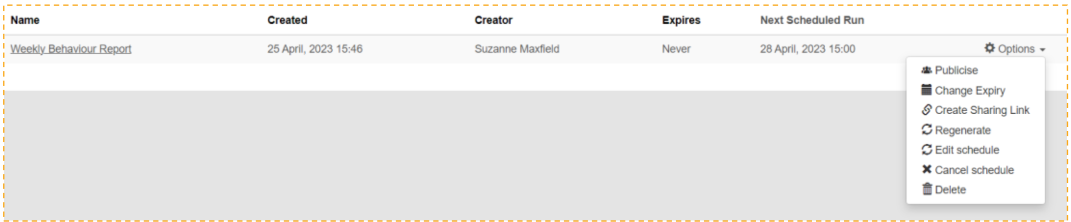


The report will then generate on screen and appear within the 'Reporting' area > 'Saved Reports' tab should you need to update any settings.

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.*

10.6 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. <u>*Leave blank for all time, and all categories.*</u>
- *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.* <u>*For the total number of incidents only leave secondary grouping blank.*</u>
- 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.

10.7 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. <u>*Leave blank for all time, and all categories.*</u>
- *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.
- 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.

10.8 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.
- Lastly click **'Generate Report'.**

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

10.9 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.*

10.10 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.
- 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.

10.11 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'.**

10.12 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.

10.13 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.
- Lastly click **'Generate Report'.**

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

10.14 Incidents logged by a certain staff member(s)

- 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.
- 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).

10.15 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.

10.16 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.
- Lastly click **'Generate Report'.**

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

10.17 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.
- 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).

10.18 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.*

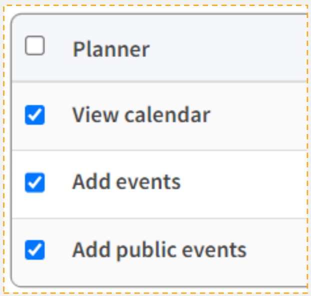
  Beneath 'Containing', please choose 'Any' to search for any of the words you have entered, 'All' for an exact match, or 'Exclude' to exclude any incidents containing this word.
- Scroll down and leave the **'Report Type'** on **'Listing'.**
- In **'Report Format'** select 'Enquiry view' to view the results 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.

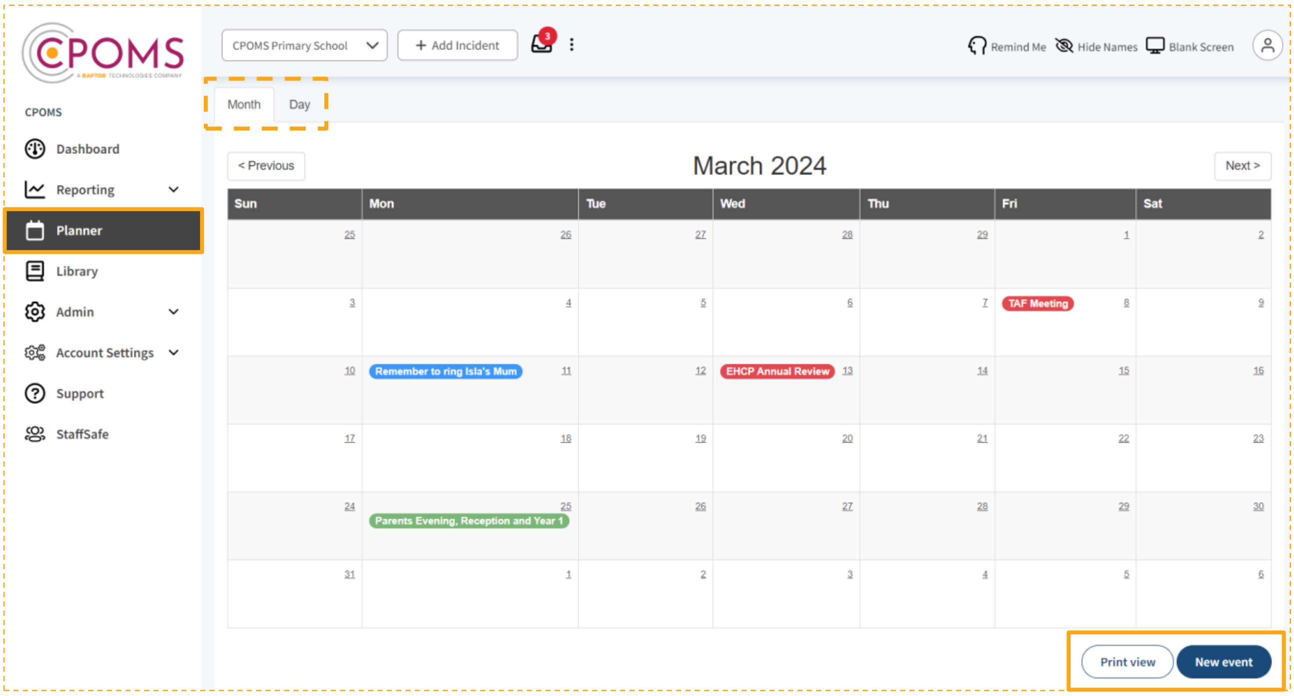
11 Planner

CPOMS contains a **'Planner'** functionality, which can be accessed by those with both two-factor authentication setup and the relevant 'Planner' permissions selected within their User Group.

A CPOMS ***Admin Key Holder****, can check and amend your User Group permissions via* ***'Admin'*** *>* ***'Users'*** *tab, by clicking on a User Group name (to the right-hand side of the page).*



The **'Planner'** area is available in the left-hand navigation panel.



The 'Planner' displays any events or reminders set for each month, in a familiar calendar layout.

A day view is also available, which shows a timeline style display of events for the selected day. *Click on the date number to view by day.*

Public, shared and private events are differentiated by colour. Please see below key:-

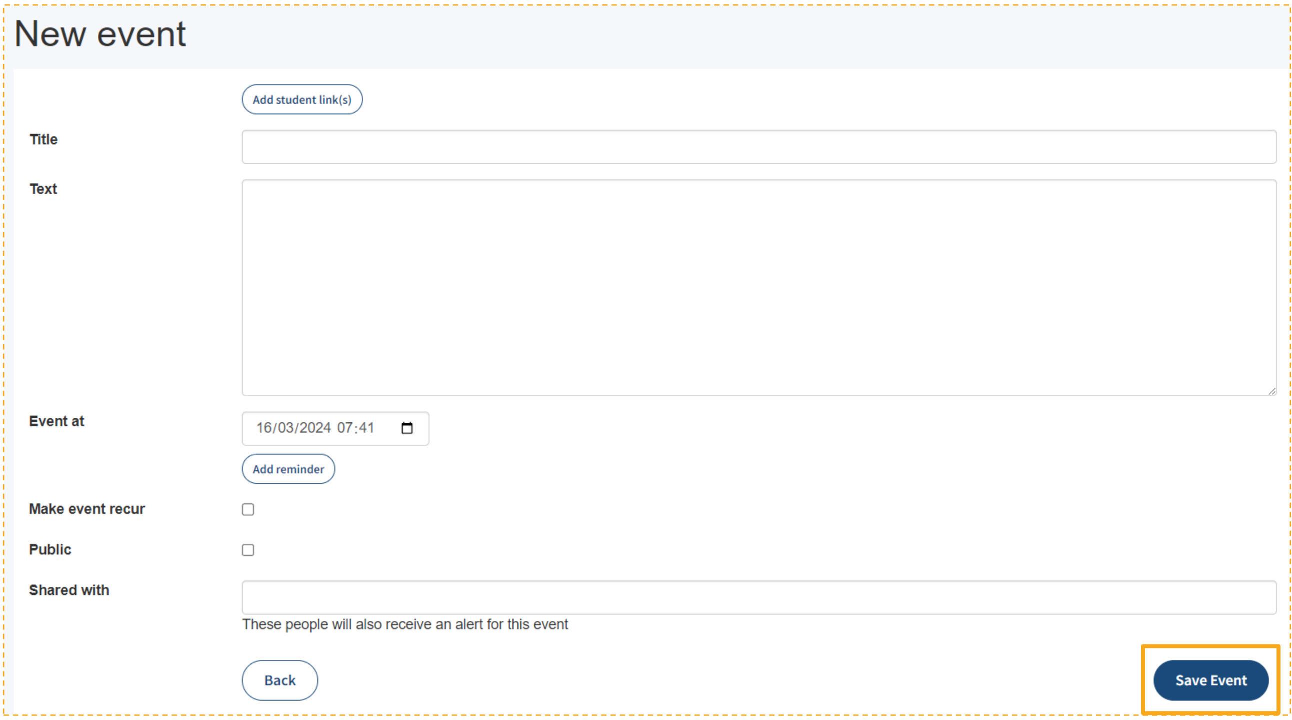
Public event
Shared event
Your private event
Your shared event
Your public event

You may print a copy of the calendar, by selecting the 'Print View' button, in the bottom right corner. This will generate a print-friendly PDF version which you can then choose to print.

11.1 New Event

To create a new event, click on the **'New event'** button, in the bottom right corner.

Complete the **'New event'** form:-



- **Add student link(s)** – if the event is in relation to a student, you may add a student link.

  This is useful for example if you have a case review meeting for a particular child or family. You can then click through to their profile easily from the event to run off a comprehensive incident report ahead of the meeting.

  The event will also display at the top of the students 'Overview' tab, within their profile, until the event has taken place.

- **Title** – enter a title or short summary about the event, this title will display in the calendar view.

  For example, TAF/ TAC Meeting (Team around the Family/ Child), PEP Meeting (Personal Education Plan Meeting), Annual EHCP Review for student.

- **Text** – enter any further text about your event, e.g. details of where it will take place, who else will be attending, a meeting agenda etc.

- **Event at** – choose your event date and time.

- Click **'Add reminder'** to set a reminder for the event, you will then be able to choose your reminder timeframe *e.g. 1 week, 1 day, 1 hour before.*

- **Make event recur** – if the event will reoccur in the future, tick 'Make event recur'. You can then choose its recurrence basis, e.g. daily, weekly, monthly and the number of recurrence you require. Choose your **'reminder'** timeframe, if required.

- **Public** – tick 'Public' if you would like to share this event with all key holders with access to the Planner area. *Not recommended for personal or confidential events.* *If this option is not ticked, the event will automatically default to private.*

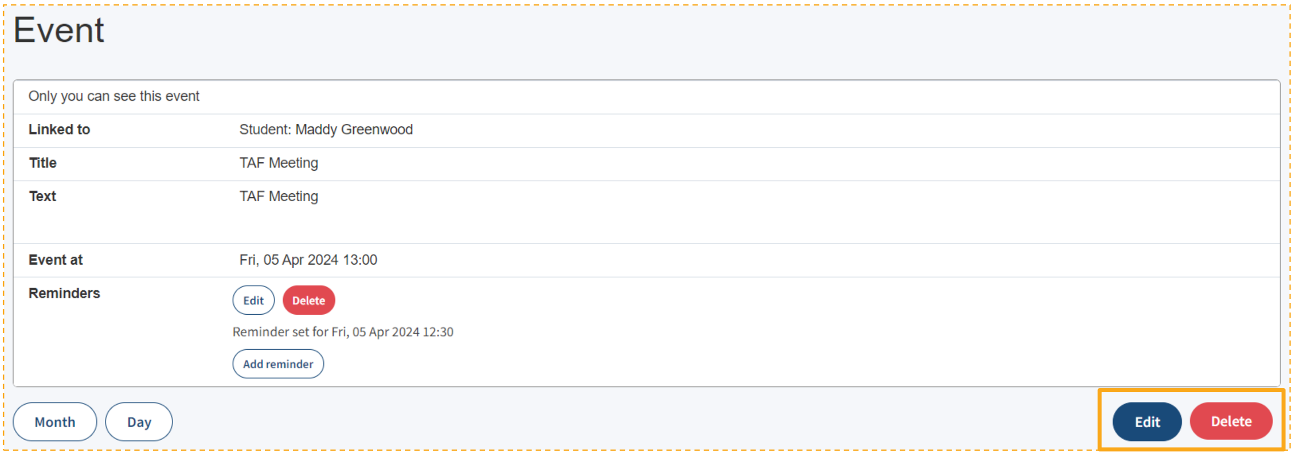
- **Shared with** – begin to type the name of any other staff members you wish to share the event with and click on it once it appears for selection, i.e. other attendees of a meeting. The event will then appear within their planner area, and they will also receive any reminders that you have set for the event.

- When you are ready click **'Save Event'**.

11.2 'Edit' or 'Delete' an existing event

To edit or delete an existing event, simply locate it within your 'Planner' and click on the event title to view further information about it.

Beneath the event information, you will see buttons to **'Edit'** or **'Delete'**.



12 Library

The **Library** section of CPOMS acts as a central repository to store any school or CPOMS related files.

You can choose to upload your school's generic policies, procedures and templates in this section, and alert the relevant users to said files. Alerted users can in turn mark the files as 'read and understood'. You will then have a log of who has been alerted to a file, a date and time stamp of when they last viewed it and also when they clicked to 'mark as read'.

Uploaded files are displayed in a table, including the date of upload and its size.

Do not add any confidential or sensitive documentation in the Library area.

Sensitive documentation must always be logged as a new incident, against the relevant student, with the relevant category(s) assigned to it. This ensures that only those with the correct level of access can view the information.

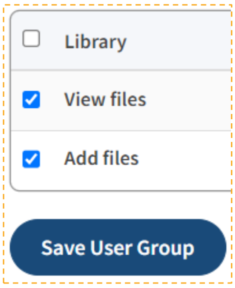
12.1 Allowing access to the Library

To allow access to the Library area of CPOMS, you must ensure that the 'Library' permissions are selected in each user group that requires access.

To check and amend this, go to **'Admin'** > **'Users'** and click into a user group name *(to the right-hand side of the screen).*

Scroll down to the **'System Permissions'** and under **'Library'**:-

- Tick **'View files'** to allow users in this user group to access and view files added to the Library area.
- Tick **'Add files'** to also allow users in this user group to add their own files to this area as well. *You can leave this option un-ticked if you would like users to view files only.*

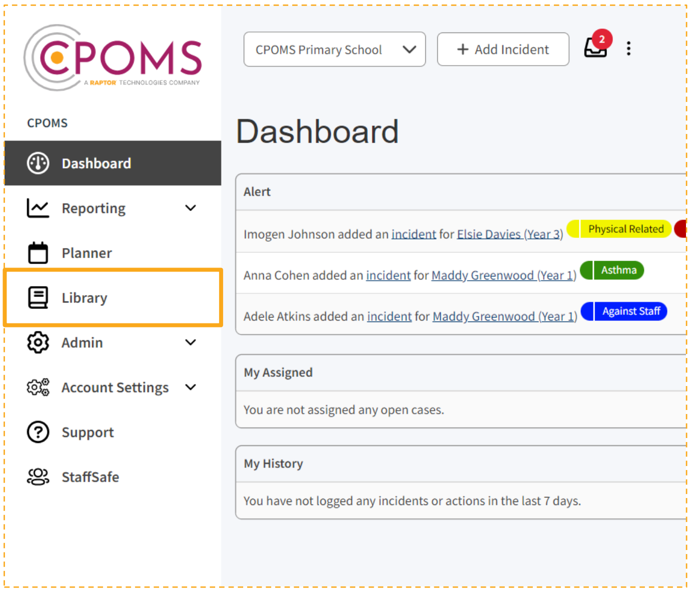


Please ensure that the 'View files' permission is ticked in all of the user groups that you would like to be able to access the Library area.

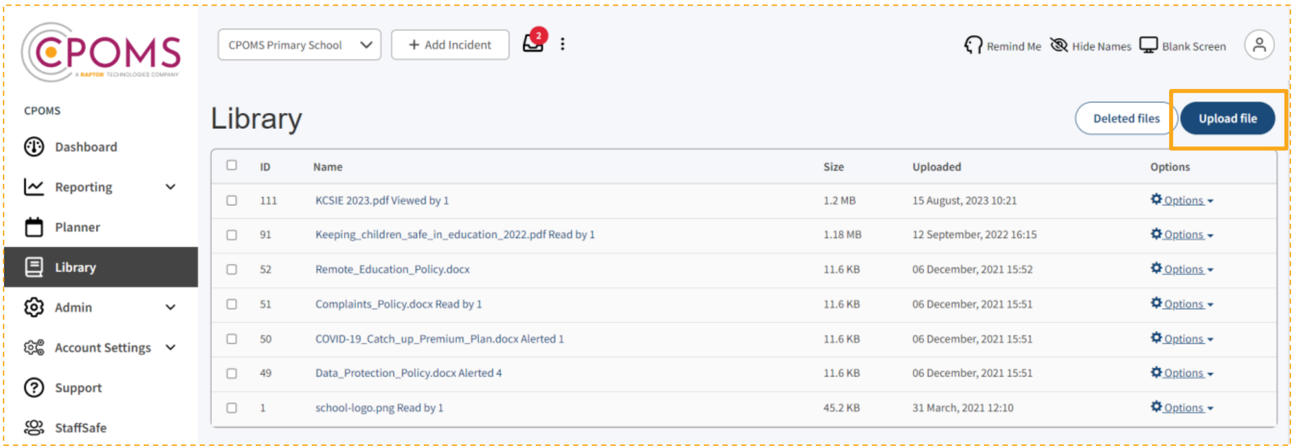
Please note, by applying this permission users in the user group will be able to view all documents in the Library area, not just those you have alerted them to.

12.2 Uploading a file to the Library

On the main CPOMS Dashboard, click on the **'Library'** button, in the left-hand navigation panel.



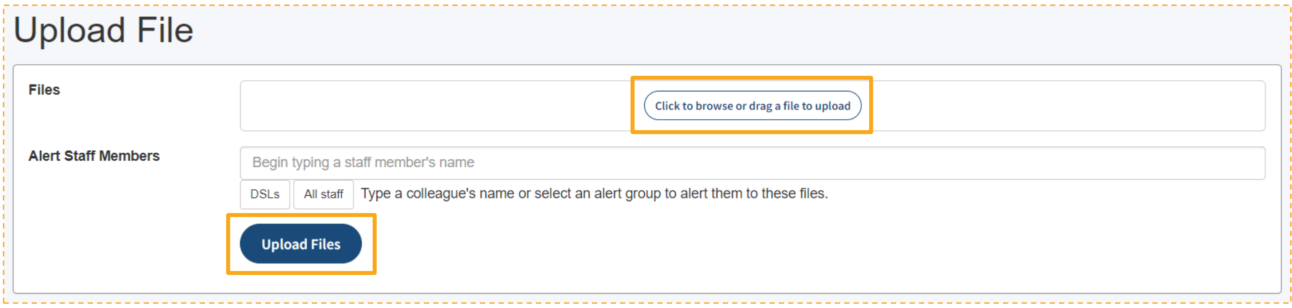
Click on 'Upload file', to the right-hand side of the page.



Select the file you would like to upload to CPOMS via the 'Click to browse or drag a file to upload' area.

Next, you may choose to alert individual staff members, or choose one or more of your alert groups. *Once you upload the file, the chosen member(s) of staff will receive an email notification to advise they have been alerted to a file in CPOMS and this alert will also be listed on their dashboard to view on their next log-in. (Further on in this document we explain how to create an alert group for all staff)*

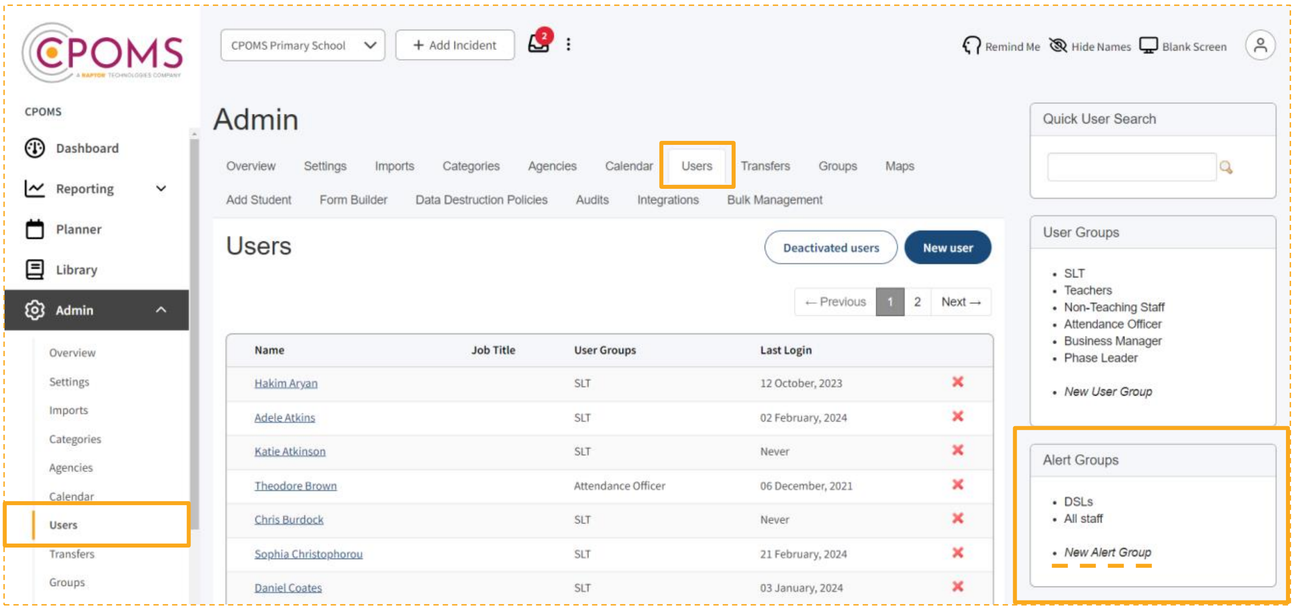
Once selected click 'Upload Files'.



12.3 How to create an Alert Group for All Staff

Rather than alerting staff one by one to a file in the Library area, it is useful to create an Alert Group for All Staff so you are able to alert all members of staff to a document at the click of a button.

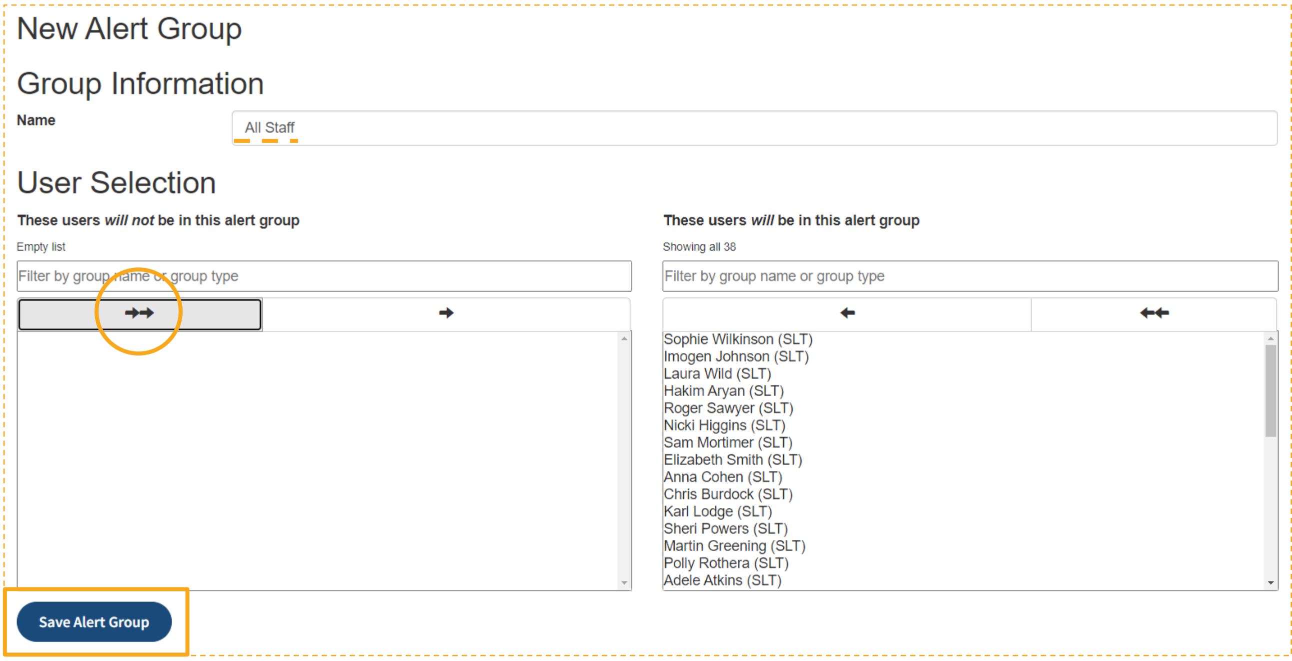
An **Admin Key Holder** can create a new Alert Group within your system by accessing the **'Admin'** area, **'Users'** tab, and within 'Alert Groups' (to the right-hand side of the page), select **'New Alert Group'**.



Firstly enter your new Alert Group **'Name'** e.g. All Staff.

Next, use the arrow(s) to move across the members of staff that you require to be in the Alert Group to the box on the right, titled 'These users will be in this alert group'. To move all staff at once simply select the double arrow.

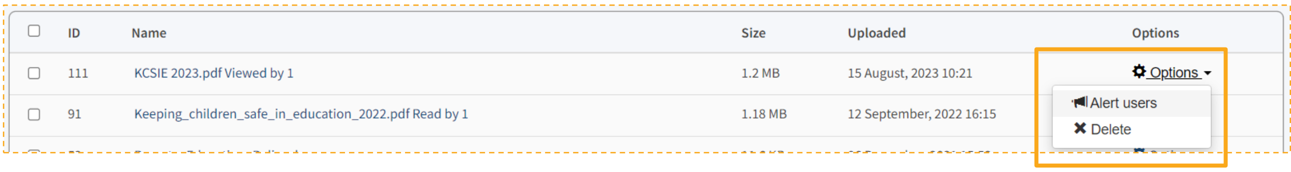
Click **'Save Alert Group'.**



12.4 Alerting staff to an existing Library file

To alert staff to an existing Library file, please click on the ‘Library’ section, in the left-hand navigation panel.

Locate the file that you would like to alert staff to, click on **‘Options’**, and **‘Alert Users’.**



In the pop-up box that appears, type in the relevant staff members name(s) into the field provided or you may click on one or more of the ‘Alert Groups’ listed. There is also an additional check box for ‘Require action’ if it is needed. When you are ready click **‘Submit’.**

12.5 Printing a list of who has viewed a Library file

If you have alerted staff to a file in the Library, and it says 'Read by' (next to the document name, in small writing) you can click on this and choose to download the information shown as an image. The image will show you who was alerted and by whom, the date of the alert and when it was last viewed, and also whether they have marked it as read and understood.

You can then print off the downloaded image.

12.6 Viewing and downloading Library files

To view a file in the Library area, simply click on the name of an uploaded document and it will open the file. The file will be displayed in your internet browser, or it will download a copy to your device depending on your device settings. Usually files such as images and PDF documents will open in-browser. If in-browser viewing is not supported for the file in question, clicking it will save a copy of the file to your Downloads folder or as a Temporary Internet file.

Please be careful when downloading sensitive files to your device, especially if the device is shared amongst other users. You may wish to delete the file from your Downloads folder once it has been viewed.

If you would like to save a file which opens in-browser by default, right-click on the file and select 'Save link as' (Chrome) or 'Save target as' (Edge/Internet Explorer).

12.7 Deleting a Library file

To delete a file from the Library area, please click on the **'Library'** section, in the left-hand navigation panel.

Locate the file that you would like to delete, click on **'Options'**, and choose **'Delete'**.

You will then be prompted to provide a **'Reason for deletion'** please enter your reason and click **'Delete'** to confirm.

If you do not have the option to delete here, please contact your CPOMS Administrator to arrange this for you.

Deleted files are essentially hidden so that they can be restored in the future if required. To permanently delete a file, the Head Teacher or a CPOMS Admin Key Holder will need to contact us to arrange in writing, including the document ID.

12.8 Restoring a Library file

Deleted files in the Library area can be restored at a later date if necessary. Once you delete a file from this area, an additional button for 'Deleted Files' will appear to the top-right hand side of the Library area.

To restore a file, simply click on the **'Deleted Files'** button, locate the file that you would like to restore, click on **'Options'**, and choose **'Restore'**. When prompted click **'OK'** to confirm.

12.9 Supported file types

The following file types can be uploaded to the CPOMS Library area:-

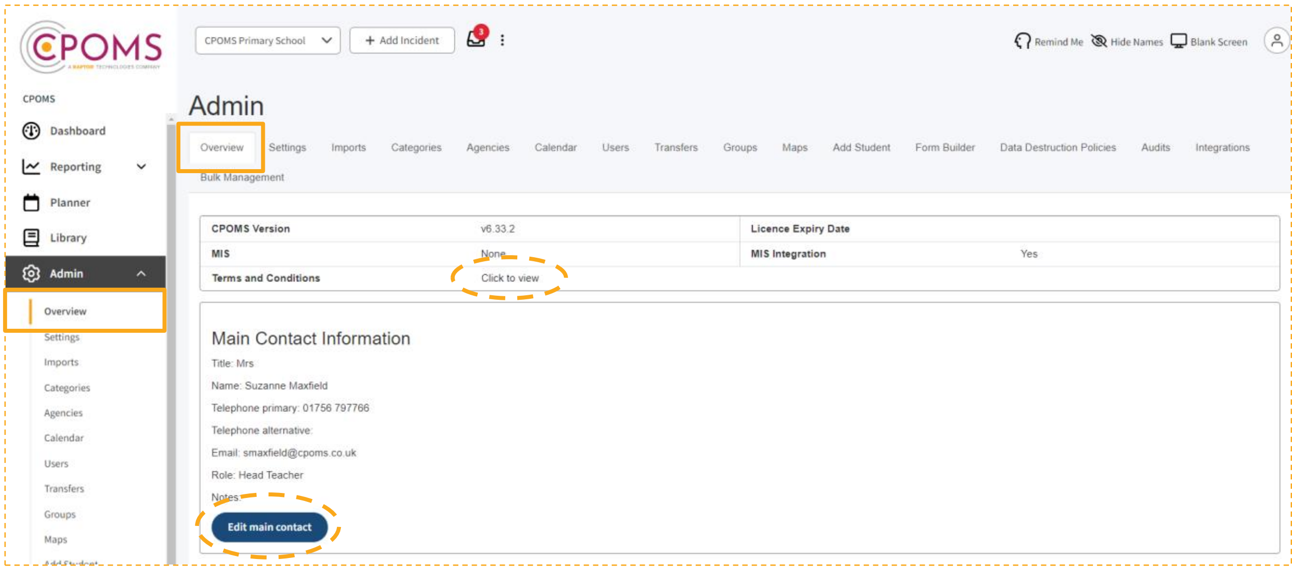
- PDF document (.pdf)
- Microsoft Office files (e.g. .docx, .xlsx, .pptx, .pub)
- Microsoft Outlook/Exchange email message (.msg)
- Any image file (e.g. .jpg, .png, .gif, .tif)
- Any audio file (e.g. .wav, .mp3, .m4a, .wma)
- Any video file (e.g. .mp4, .mov, .mpg, .avi)
- Text/data files (.txt, .csv, .xml, .html)
- Archive/compressed files (.zip, .rar, .7z, .zipx)
- Rich text document (.rtf)
- OpenDocument files (.odt, .ods, .odp)

This list is not exhaustive, but an example of common file types that may be uploaded to CPOMS.

13 Admin

The **Admin** area of CPOMS allows those with Full Administration rights only to manage your CPOMS system via the various tabs.

You may click to view the CPOMS Terms and Conditions, within the Admin area, ‘Overview’ tab.



*You may also add and update your **Main Contact Information** here. It is important to keep this accurate and up to date to ensure you do not miss important updates and communication from us.*

14 Settings

Within the **'Settings'** tab, you can check and amend some general settings for your CPOMS system.

These are as follows:-

- **Security message:** You can personalise the default security message which appears in the top left-hand side of your CPOMS system. It defaults to 'It is your responsibility to logout and protect the security of student information'.
- **Idle timeout:** You can also adjust the 'Idle timeout'. This is the number of minutes until the system reverts to 'blank screen mode' if the user is inactive on their machine.
- **Students** - Use legal names instead of preferred names
- **Users** - Use legal names instead of preferred names
- **Dashboard group type:** Select your preferred group to appear on the main dashboard *i.e. Tutor or Year Group*
- **Main group type:** Select your preferred main group type within the reporting section *i.e. Tutor or Year Group*
- **Attendance Trend Values:** These values signify the number of days to take into account when calculating a student's attendance trend.
- **School logo:** Select your school logo. The logo will then appear on your CPOMS login screen and in the header of PDF reports. *The logo must firstly be added to your 'Library' section for you to be able to select it here.*
- **Student Name Format:** Select your preference on how student names appear in CPOMS *i.e. First Name Last Name, or Last Name First Name.*
- **Time zone:** Select your preferred time zone, if different.
- **Enforce at least one alert for all incidents?:** If selected, an incident cannot be submitted without an alert being chosen.
- **Disable user accounts which no longer appear in automatic extracts**
- **Use email address domain whitelist:** Only emails which match the chosen domain will be able to be used.
- **Training Mode:** You may also enable training mode here, please see below for more information about Training Mode.

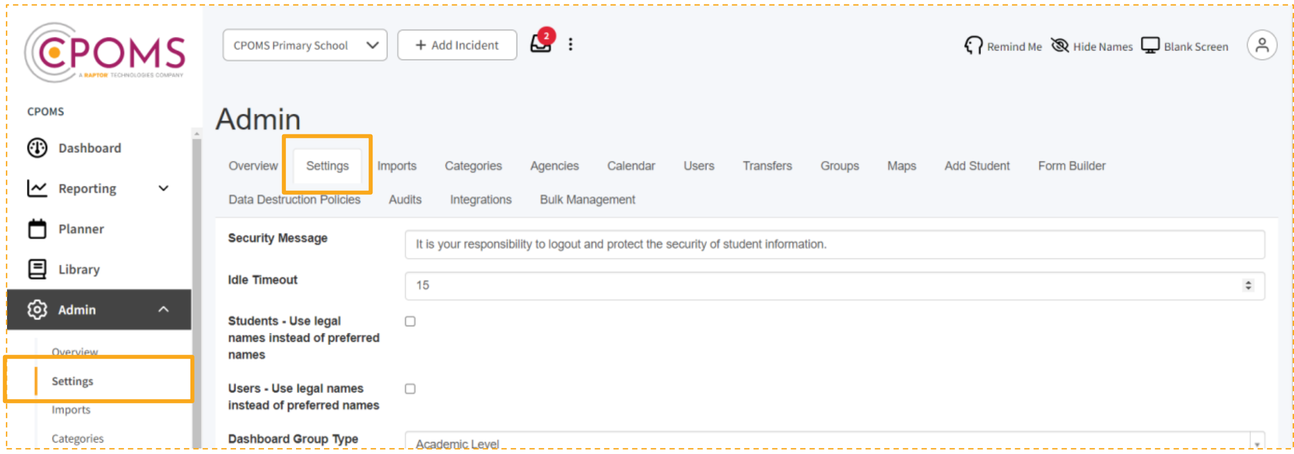
15 Training Mode

Within CPOMS there is a Training Mode available, which can be enabled at any point. Training Mode allows you to add test incidents and actions within your CPOMS system which will disappear once the mode is disabled.

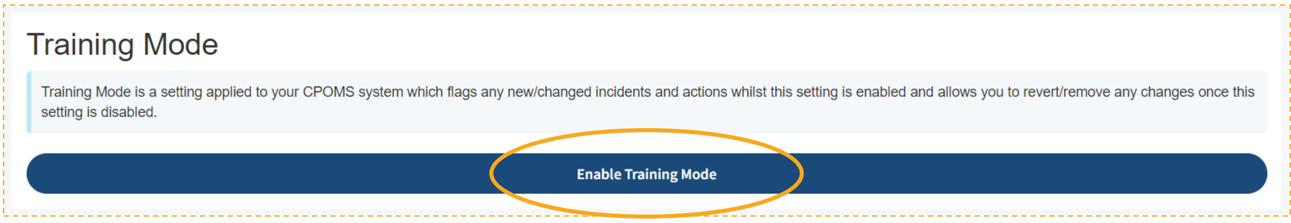
This can be used if you would like to test how incidents and actions will appear in the system, or if you would like to train staff on how they should complete the Add Incident or Action form when a disclosure is made or an incident has taken place.

15.1 How to enable Training Mode

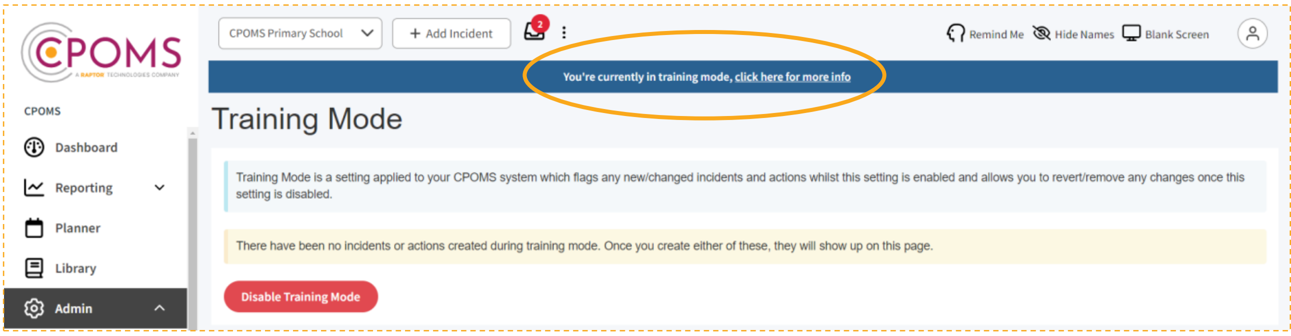
To enable Training Mode, a CPOMS **Admin Key Holder** must navigate to the **'Admin'** area > **'Settings'** tab.



Scroll to the very bottom of the page and click **'Enable Training Mode'**.



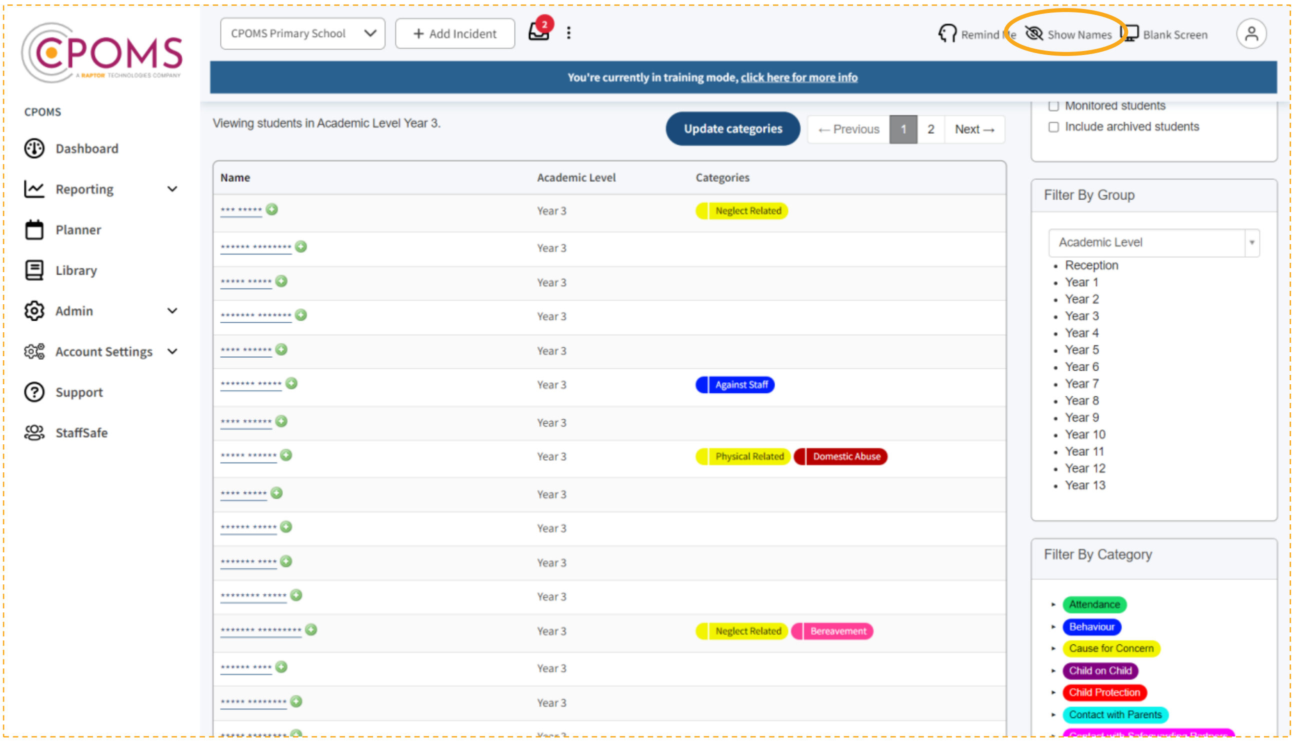
Once Training Mode is enabled, a blue banner will appear across the top of the screen for all staff within your school, to make them aware that Training Mode is switched on.



You can now add fictious incidents and actions to the system to see how these will appear in your CPOMS system. Please note, if configured alerts are setup, or you choose to alert a staff member during training mode, the alert email will still send to the user.

15.2 Hide Names Feature

If you are showing the system to group of staff you may wish to choose to 'Hide Names'. This is situated to the top right-hand corner to anonymise your class lists, or who you are adding an incident/ action to.



15.3 How to disable Training Mode

Once you have completed the training, to disable Training Mode a CPOMS Admin Key Holder will need to navigate back to **'Admin'** > **'Settings'** and click on **'Manage Training Mode'** at the bottom of the page.

Or, click the 'click here for more info' within the blue banner.

You will then be able to see a list of all incidents and actions that were submitted whilst Training Mode was enabled to review before deletion.

If a genuine incident or action was inputted whilst training mode was enabled, please untick the incident/ action from the list of incidents/ actions added during training mode, before you click 'Disable Training Mode' otherwise it/ they will be lost.

When you are ready to disable Training Mode please click on the **'Disable Training Mode'** button and enter the full name of the school when prompted to confirm.

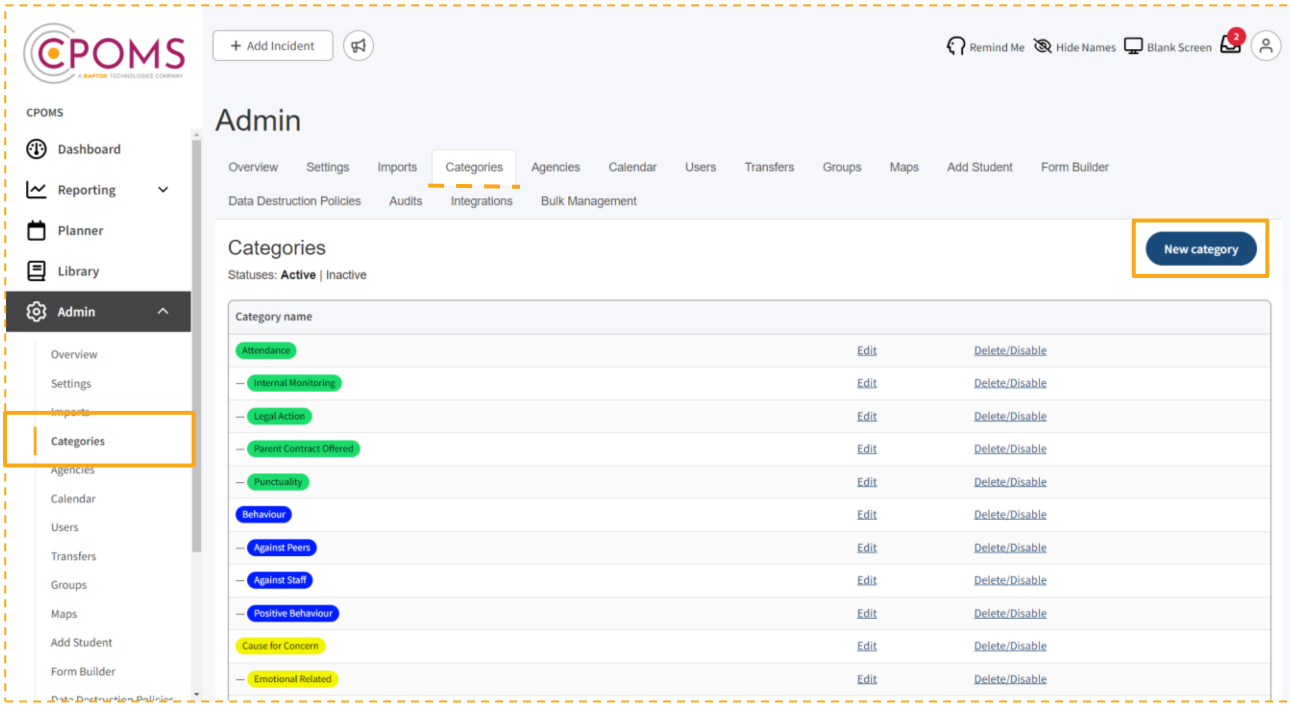
Please note:- *Training Mode only applies to incidents and actions added to the CPOMS system. Any changes made that are not on incidents and actions will remain on your CPOMS system e.g. any new categories added, or permissions implemented.*

16 Imports

Under 'Imports' you can keep an eye on your import status and when the last import took place, plus check if there are any errors occurring.

17 Categories

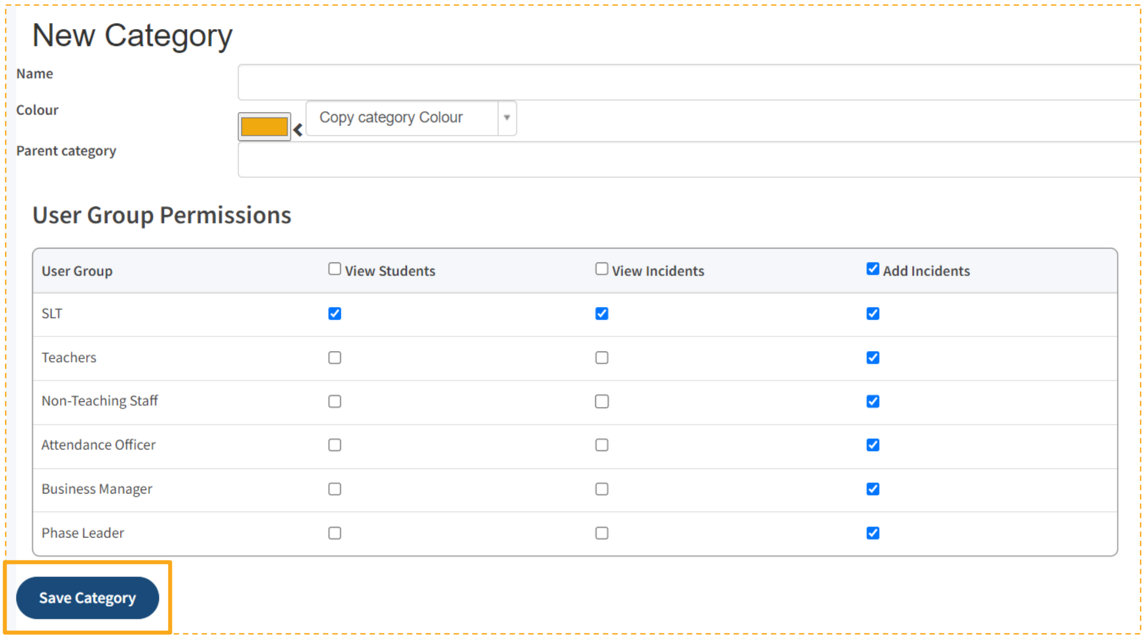
Under **‘Categories’** you can Add, Edit or Delete/ Disable any existing categories and sub-categories.



17.1 Adding a new category or sub-category to CPOMS

New categories can be added by an **Admin Key Holder** in school.

Step 1 - Navigate to the **‘Admin’** area, and click on the **‘Categories’** tab. Click on the ‘**New category**’ button to the right-hand side of the page.



Step 2 - Complete the **'New Category'** form

- **Name -** enter the name of your new category.
- **Colour -** select your preferred colour for the new category lozenge, or you can click 'Copy Category Colour' to see what colours you have used before and copy if desired (useful when creating sub-categories).
- **Parent Category** - If this will be a sub-category, please select the category you would like the new category to fall under here. **For top-level 'Parent Categories' leave blank.**
- Next, choose the **'User Group Permissions'** for the new category, these are:-

View Students	View Incidents	Add Incidents
This permission allows users in the group to view students 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

- Lastly, click **'Save Category'.**

When adding an incident to the system any sub-categories will be displayed for selection once a parent category is selected.

17.2 Merging categories in CPOMS

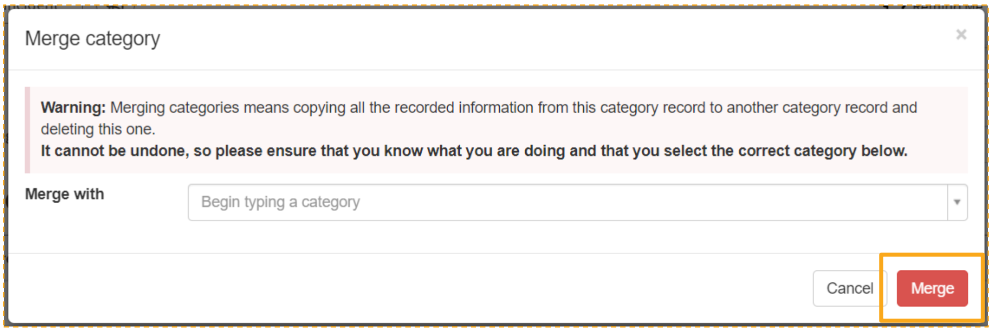
If you need to merge categories for any reason in CPOMS, this can be done by an **Admin Key Holder** in school.

Please note, the merging of categories is **irreversible** so should only be selected if you are 100% sure.

To merge two categories together, please navigate to the **'Admin'** area, and click on the **'Categories'** tab. Next, click on **'Edit'** next to the name of the category you would like to merge.

Scroll right down to the bottom of the page and click on the **'Merge category'** button.

Next, choose the category name that you would like to merge with, and click on **'Merge'.**



Once merged, all incidents assigned to the category will be re-assigned to the category you have chosen to merge with. Students currently monitored under the category will become monitored for the category you have chosen to merge with.

17.3 Changing a category name

If you need to amend a category name for any reason in CPOMS, i.e. a spelling error, this can be done by an **Admin Key Holder** in school.

Please do not change the meaning of a category when updating its name, as the new category name will be transferred to all past incidents logged against this category and also any students monitored for the category, past and present.

To amend a category name, please navigate to the **'Admin'** area, and click on the **'Categories'** tab. Next, click on **'Edit'** next to the name of the category you would like to update. Simply over-type the current category name, with the updated one, and scroll down to **'Save Category'.**

17.4 How to delete a category

An **Admin Key Holder** in school can delete/ disable categories in CPOMS. Simply navigate to the **'Admin'** area, and click on the **'Categories'** tab. Click on **'Delete/Disable'** next to the name of the category you would like to remove.

If there are no incidents assigned to the category it will be removed in full.

If the category has incidents assigned to it, the category will become disabled. This means no new incidents can be logged against the category, but incidents logged against the category can still be included in your reports.

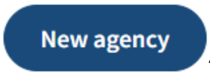
You may also choose to 'Enable' the category again in the future if needed.

18 Agencies

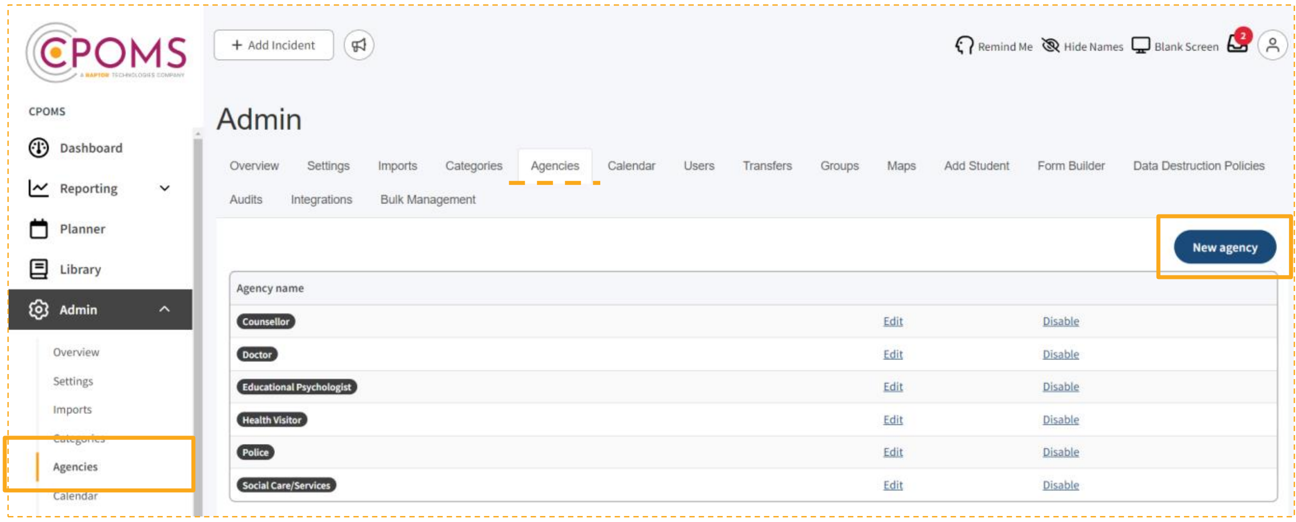
Under **'Agencies'** you can Add, Edit or Delete/Disable any existing agencies.

18.1 Adding a new agency to CPOMS

New agencies can be added to CPOMS by an Admin Key Holder in school.

Step 1 – Navigate to the **'Admin'** area, and click on the **'Agencies'** tab. Click on the '

' button to the right-hand side of the page.



Step 2 – Simply enter a **name** for the new agency and click **'Save Agency'**.

On save, the agency will appear in your 'Agency Involved' list for selection when adding new incidents and actions.

18.2 Changing an agency name

If you need to amend an agency name for any reason in CPOMS, i.e. a spelling error, this can be done by an **Admin Key Holder** in school.

Please do not change the meaning/ type of an agency when updating its name, as the new agency name will be transferred to all past incidents/ actions where this agency was tagged and also applied to any students marked as involved with the agency, past and present.

To amend an agency name, please navigate to the **'Admin'** area, and click on the **'Agencies'** tab. Next, click on **'Edit'** next to the name of the agency you would like to update. Simply over-type the current agency name, with the updated one, and scroll down to **'Save Agency'.**

18.3 How to disable an agency

An **Admin Key Holder** in school can disable an agency in CPOMS. Simply navigate to the **'Admin'** area, and click on the **'Agencies'** tab. Click on **'Disable'** next to the name of the agency you would like to remove from your agency involved list.

You may also choose to 'Enable' the agency in the future if needed.

19 Calendar

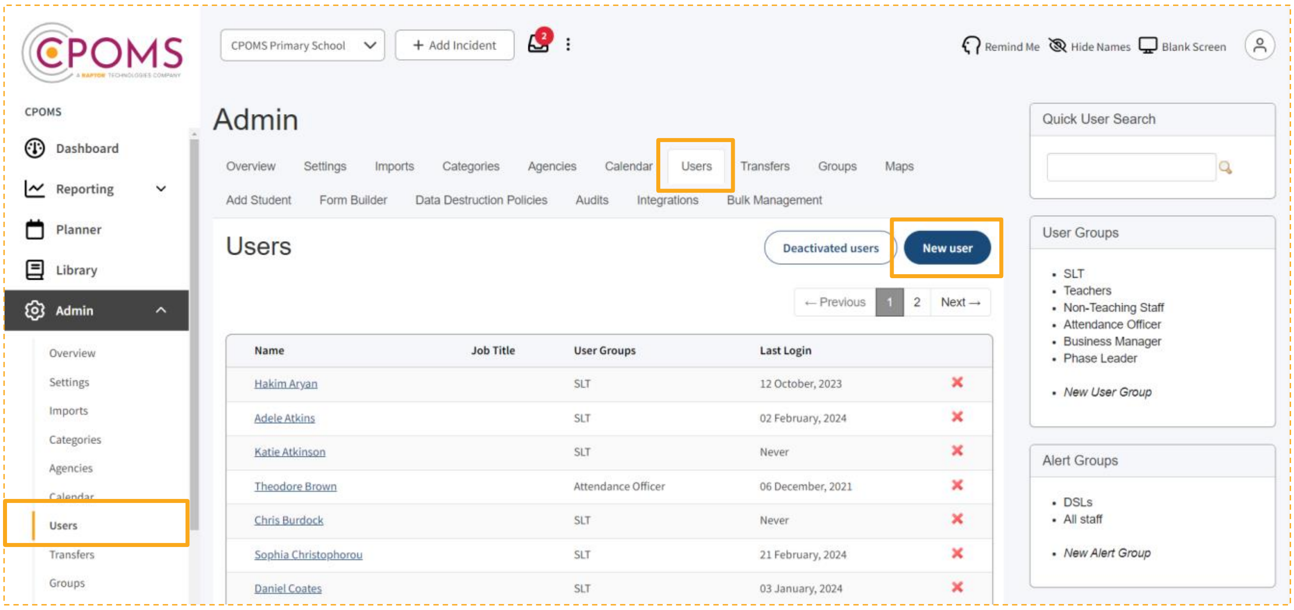
In ‘Calendar’ you can set your schools academic year start and end date. The dates are used to generate the number of incidents this academic year, which are displayed on your ‘Reporting’ > ‘Overview’ tab, amongst other things.

20 Users

Under **‘Users’** you can add, edit and disable any existing users, and if required re-activate a previous CPOMS user account.

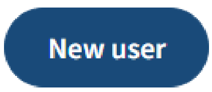
The Users section is all set up in the implementation stages and therefore you should not have much requirement to access it in the first instance.

There is a small shield icon ‘ ’ to the left of each users name who has a key setup currently.

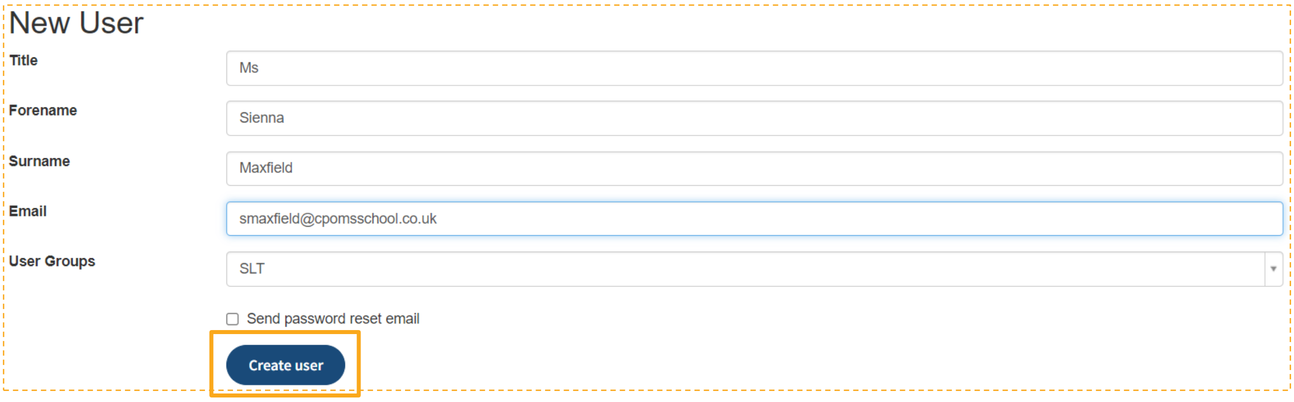


20.1 How to add a new user

To add a new user to CPOMS, go to **‘Admin’**, click on the **‘Users’** tab and select the **‘New User’** button, to the right-hand side of the screen.



Simply select the name of the member of staff you would like to add from the drop down list of users available to add. Next, input their email address and assign a user group. If you would like to send a reset password email now please also tick **'Send password reset email'** as well. Once you have filled in all of the fields click **'Create User'**.



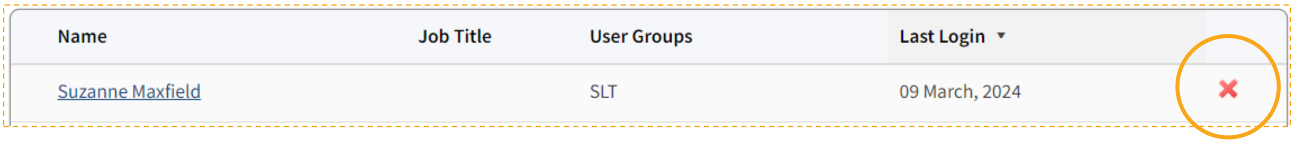
Staff will only appear in the 'New User' drop down list if they have been added to your MIS as a permanent staff member, with a current start date and a full-time member of staff. If the user will not be added to your MIS for any reason you can also choose to ***'Add Non-MIS Users'*** *here.*

Higher Level Users

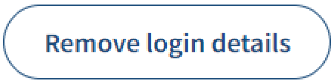
If you add a new user in a higher level user group, i.e. a member of the SLT/ Safeguarding Team, they will need to ***create a 'Soft Key' using the CPOMS Authenticator App,*** *in their own login, for the higher level permissions to take effect. For instructions, click here.*

20.2 How to ✖ deactivate a user

To deactivate a user's account in CPOMS, go to **'Admin'**, click on the **'Users'** tab and simply click on the red '**x**' icon ✖ at the end of the users row who you would like to remove from the system.



Once the user has been deactivated, they will appear within the 'Deactivated users' section. Next to their name, there will be an additional option to 'Remove login details'.



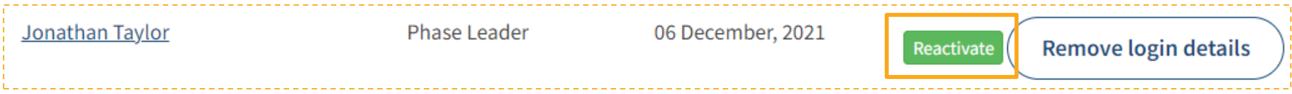
We recommend 'Remove login details' is also chosen at this point to remove their email address, especially if they have a generic email address, *e.g. head@ or office@*, as if you try to add the email address to a different user in the future you will receive an error message to say it is already in use which can cause confusion and delay.

20.3 How to ✓ reactivate a user

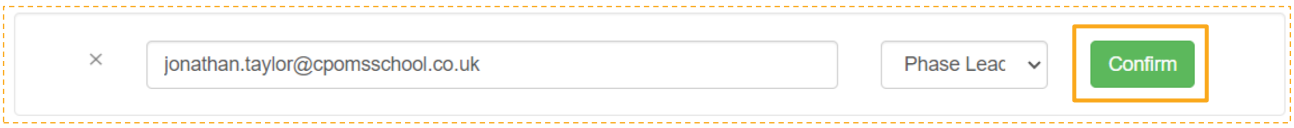
Once a user is removed from CPOMS, an additional button for 'Deactivated Users' will appear to the right-hand side of the Users tab (Next to the 'New User' button).

To reactivate a user's account in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the **'Deactivated Users'** button, to the right-hand side of the screen.

Here you will find a list of any users who have been deactivated in the past. Simply click on the green **'Reactivate'** button to re-add them to your system.



You will then be asked to input their email address and user group, and to save click **'Confirm'**.



20.4 How to change a user's email address

To change a user's email address in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the relevant user's name whose email address you would like to update. In their 'Personal Details', simply over-type their current email address, and click **'Save details'**.

20.5 How to create a new User Group

A user's permissions in CPOMS are defined by the User Group they are placed in. Therefore you can create as many groups as needed for different levels of access, i.e. you may have an SLT user group who can access all categories of incidents, whereas you may have a Teachers user group who can only access Behaviour incidents for example.

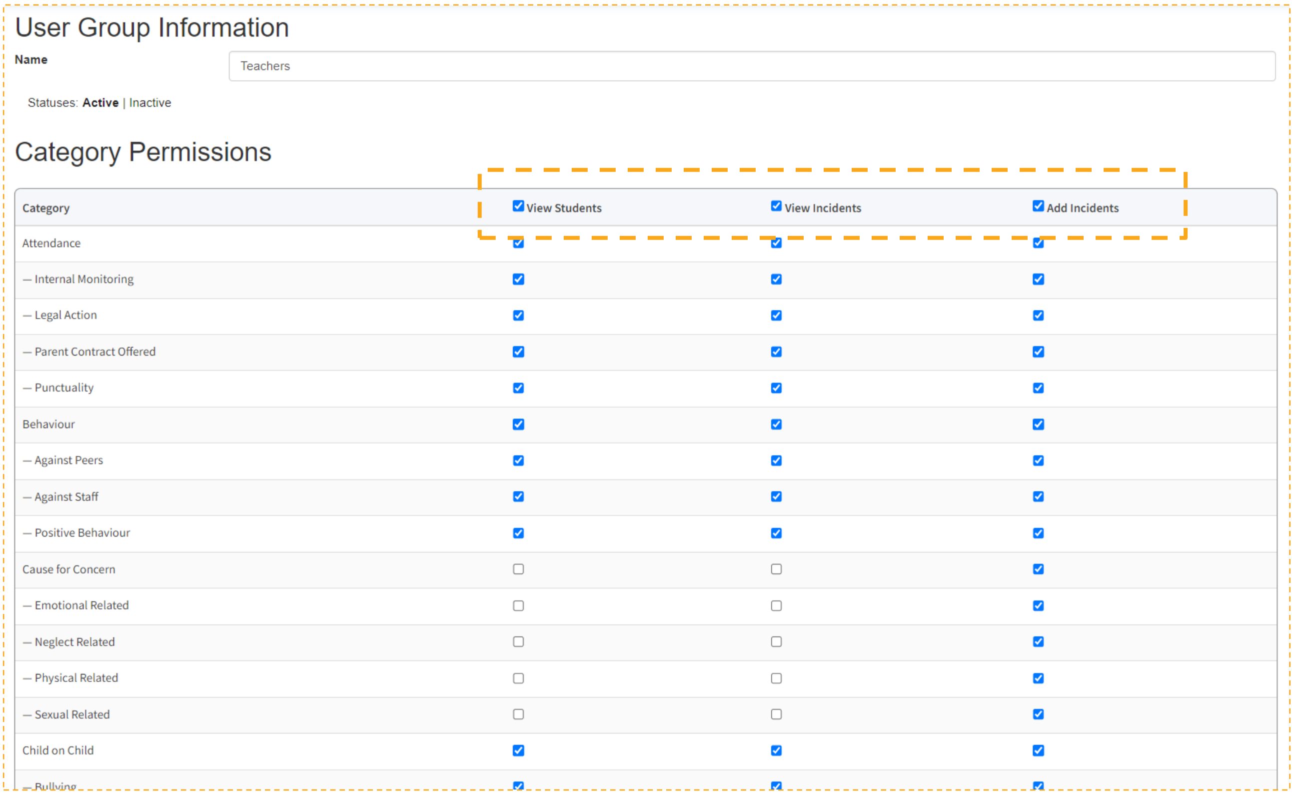
To create a new User Group in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the **'New Group'** option, to the right-hand side of the screen, underneath your list of current User Groups.

On the New User Group screen, firstly enter a **name** for the group.

Next, choose the **Category Permissions** for each of your categories and sub-categories, the permissions are:-

View Students	View Incidents	Add Incidents
This permission allows users in the group to view students 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

Example Category Permissions for a Key Holder:-



User Group Information

Name Teachers

Statuses: **Active** | Inactive

Category Permissions

Category	View Students	View Incidents	Add Incidents
Attendance	☑	☑	☑
— Internal Monitoring	☑	☑	☑
— Legal Action	☑	☑	☑
— Parent Contract Offered	☑	☑	☑
— Punctuality	☑	☑	☑
Behaviour	☑	☑	☑
— Against Peers	☑	☑	☑
— Against Staff	☑	☑	☑
— Positive Behaviour	☑	☑	☑
Cause for Concern	☐	☐	☑
— Emotional Related	☐	☐	☑
— Neglect Related	☐	☐	☑
— Physical Related	☐	☐	☑
— Sexual Related	☐	☐	☑
Child on Child	☑	☑	☑
— Bullying	☑	☑	☑

Set the category permissions for this group by ticking the relevant boxes against each of your category names. If you do not want any user in this group to access any information in CPOMS, you may choose to tick the Add Incidents column only.

Next, choose the **System Permissions** for this group.

<u>If the user(s) in this group will have a key:-</u>

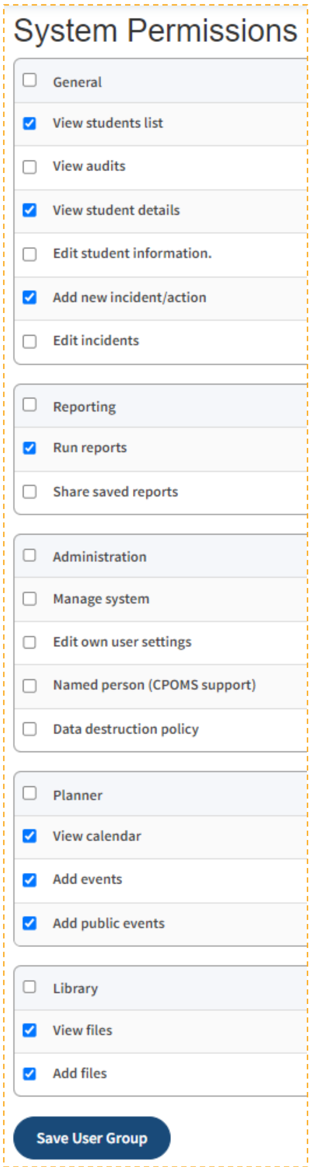
- Under **General,** we recommend you tick:-
- **View Student List** – To allow the user to click into the class structure from the main dashboard
- **View Student Details** – To allow the user to access a student's profile

<u>If the user(s) in this group will not have a key:-</u>

If the users in this group will <u>not</u> have a key, you will only need to tick **Add New Incident/Action** under **General.**

• **Add new Incident/ Action** – To allow the user to add incidents and actions to your CPOMS system Other permissions you may wish to allow for the user group are:- • **Reporting > Run Reports** • **Planner** • **Files** • And **Library** **Administration privileges should only ever be given to senior members of staff.** Once you are happy with the permissions set, please click **'Save User Group'.**	Other permissions you may wish to allow for the user group are:- • **Library**

Example System Permissions for a Key Holder:-



20.6 How to change a users permissions/ User Group

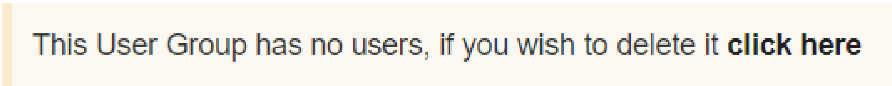
Go to **'Admin'** > **'Users'** and click on the user's name from your list of users. In their profile, click on '**Permissions'**. Choose a different user group name from the User Group drop-down here, and **'Save Details'**.

20.7 How to delete a User Group

It is not possible to delete a user group which is currently assigned to users in the system. In order to delete a user group you must firstly re-assign all current users in the user group to a different one.

To re-assign a staff members user group, go to **Admin > Users** and click on the user's name from your list of users. In their profile, click on **Permissions** to the left. Choose a different user group name from the User Group drop-down here and **Save Details.**

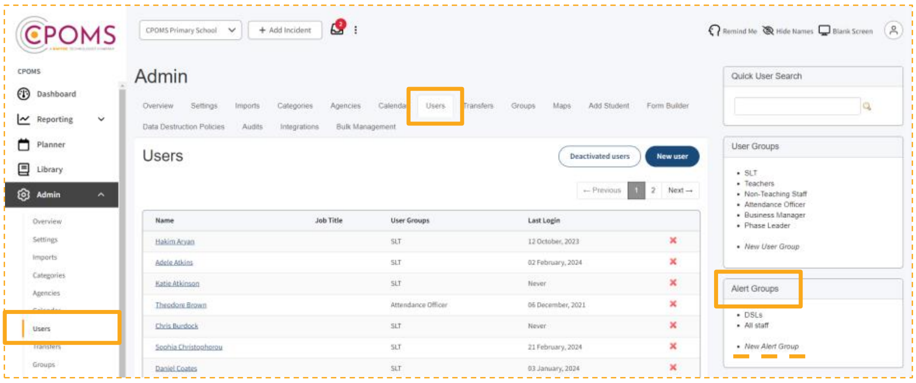
Once you have moved all users out of the group, go to **Admin > Users** and click on the User Group name to the left-hand side. There will be an option at the top of the page which says **'This User Group has no users, if you wish to delete it click here'**. *Please follow the on-screen steps.* If this option does not appear it means there are still users within it.



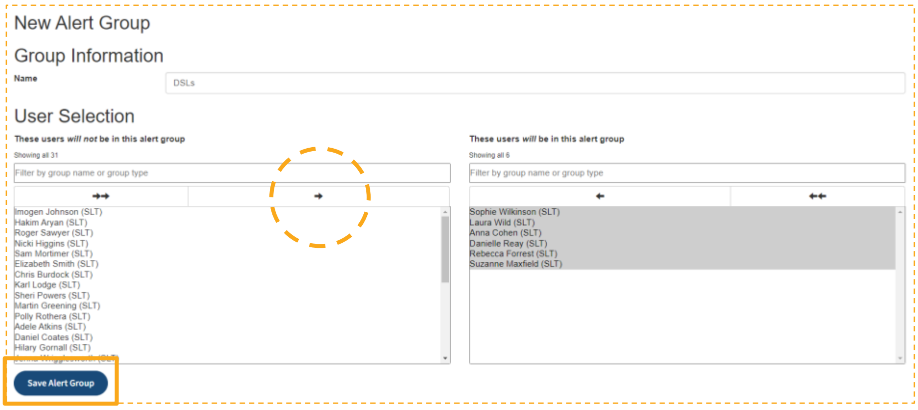
20.8 Alert Groups

Alert Groups can be created within CPOMS by an **Admin Key Holder** so that when any member of staff creates an incident they can select to alert groups of staff, rather than having to alert each person in turn. For example, were a school to have 3 Designated Safeguarding Leads, all 3 of them can be alerted to an incident at the same time with the click of a button.

Alert Groups need to be configured **by the school** from within **your own version of CPOMS.**

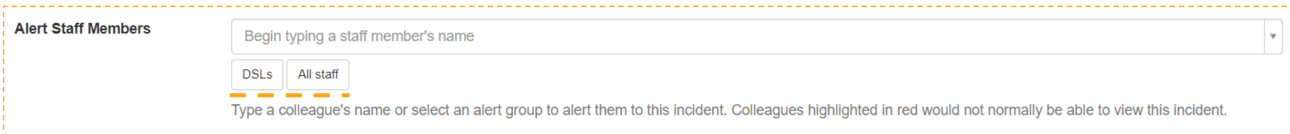


- You can create an **Alert Group** within your system by accessing the **'Admin'** area, **'Users'** tab, and within **'Alert Groups'** select **'New Alert Group'.**



- Firstly enter your new Alert Group Name i.e. SLT, DSL's.
- Next, use the arrow(s) to move across the members of staff that you require to be in the Alert Group to the box on the right. You can also type the names of User Groups within the search bar, e.g. Teachers, to move multiple members of staff at once using the double arrow.
- Click **'Save Alert Group'.**

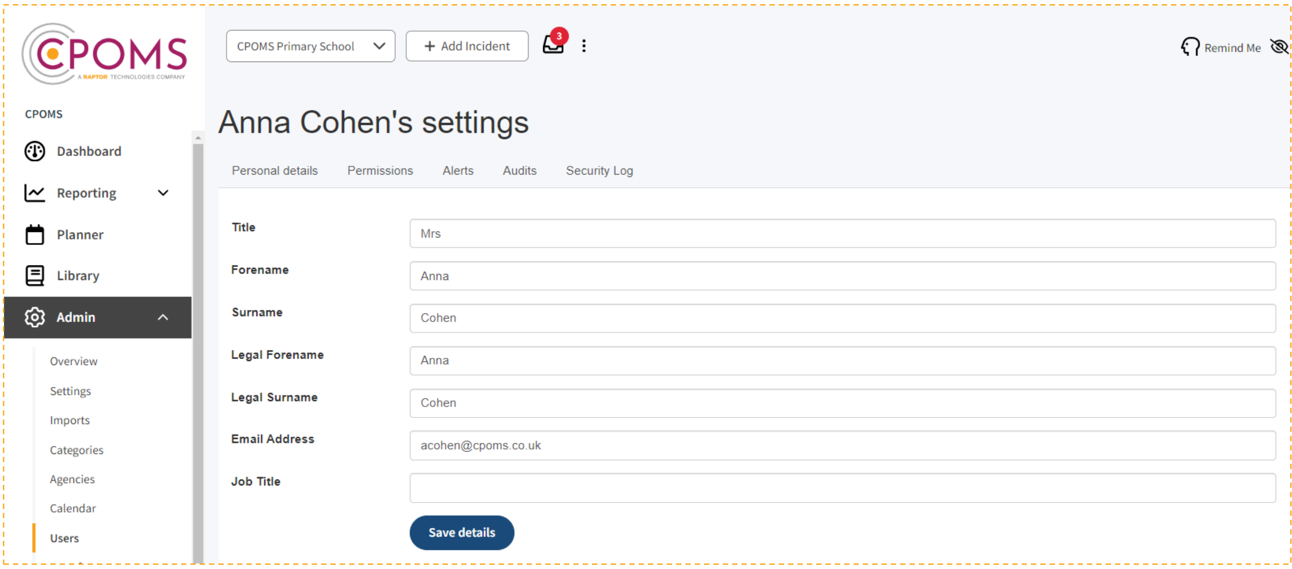
When a member of staff adds an incident to CPOMS, they will now be able to select an Alert Group as per the screen below.



20.9 Users Profile

Under **Users**, you can access and amend each user's profile by clicking on their name from your list of users.

Here you can choose to amend the users email address *(under 'Personal Details'),* or User Group *(within 'Permissions').*

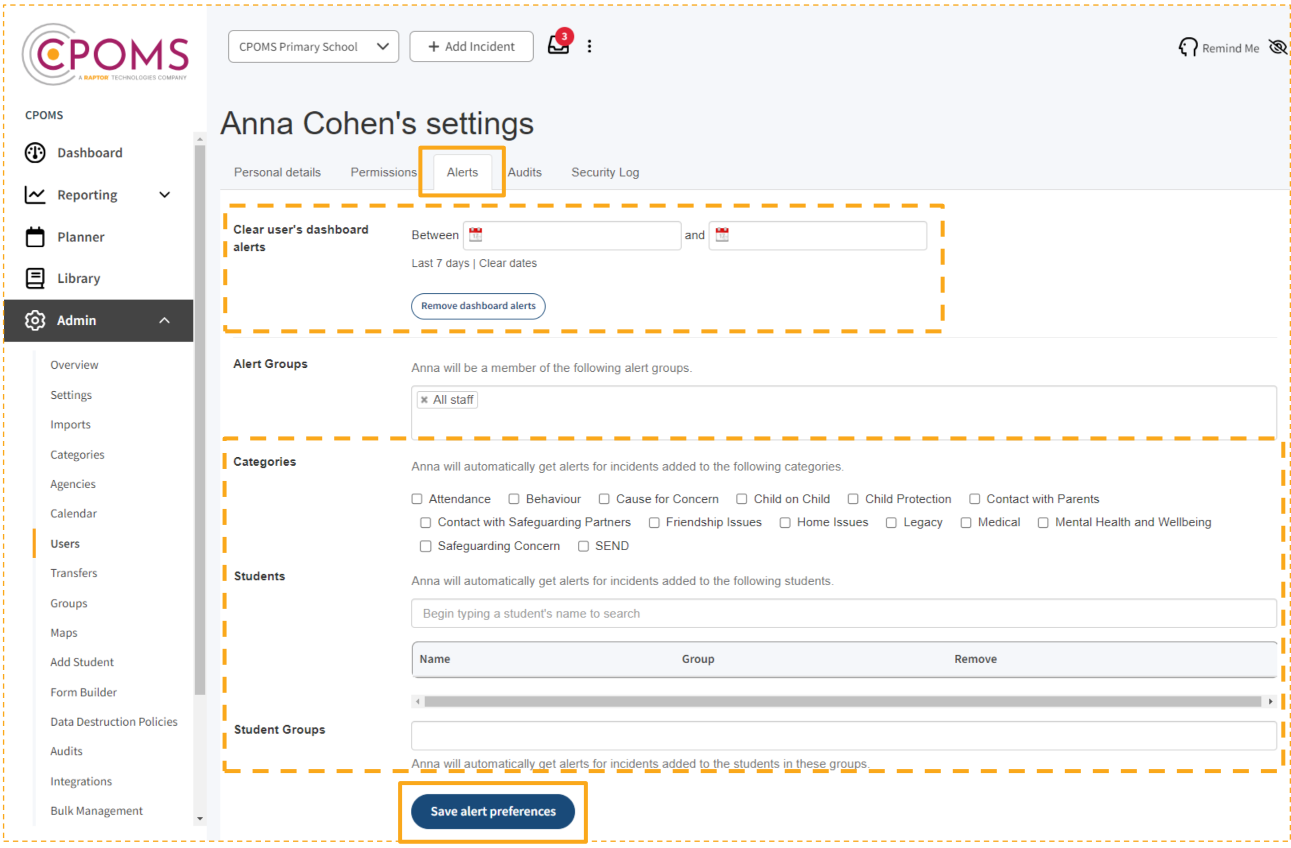


Within each individuals profile, under **'Alerts'** you can also assign **user specific alerts** *(automatic alerts)* by:- Category, Student, or Student Group.

For example, if you want to make sure that every time a 'Child Protection' incident is added to the system you are alerted automatically - this can be done here by ticking the relevant category and save.

*You can also choose to clear a user's dashboard alerts here. Next to **'Clear user's dashboard alerts'** enter the dates you would like to remove the alerts between and click the **'Remove dashboard alerts'** button.*

Please note, this will remove all of the user's dashboard alerts within the input timeframe so should only be selected if you are happy that they have been dealt with.



Under **Audits** you can check out every click of a button for the user in question.

Lastly in **Security log** you can see the number of times the user has logged in using two factor authentication and the IP location.

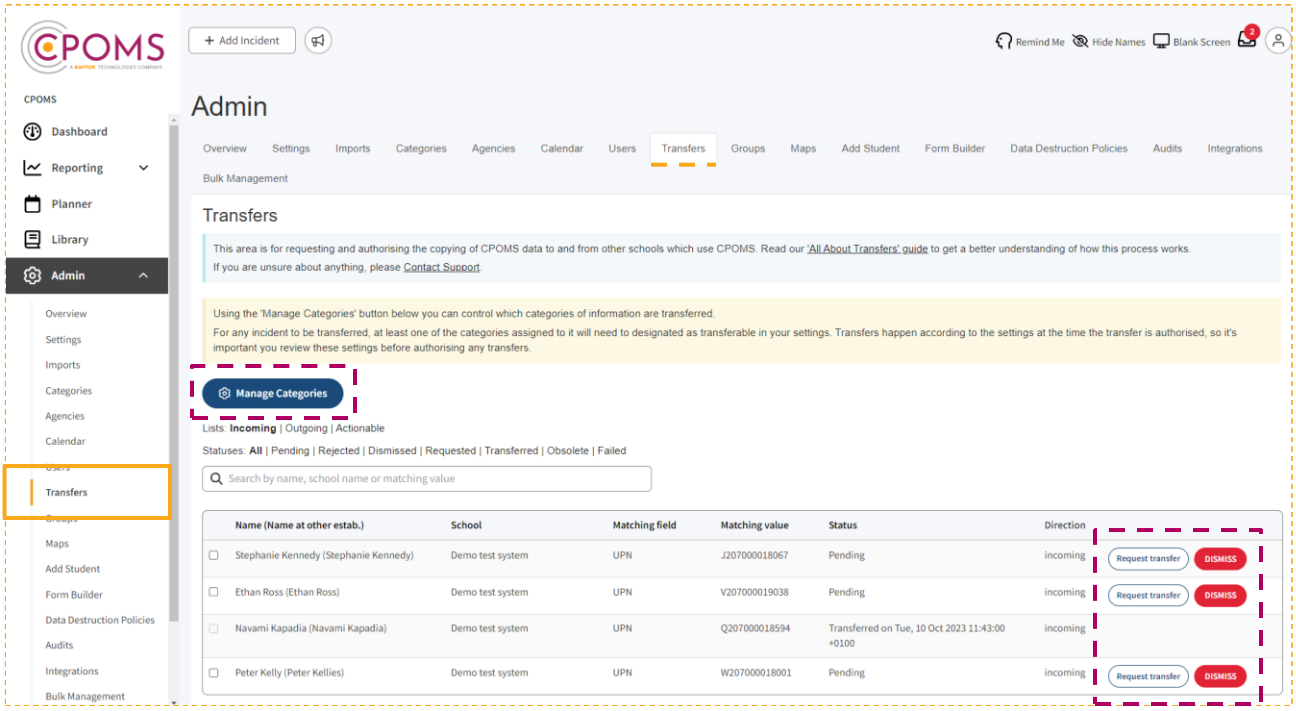
21 Transfers

21.1 The Transfer Process

If both the student's previous and new establishment uses CPOMS, once the student officially leaves/ moves establishment and their UPN or ULN is added **identically** at both establishments (within the MIS > CPOMS), the transfer between CPOMS will be detected automatically. (Assuming the student has incidents logged against them)

Once detected, the new establishment will receive a notification to **'Request'** the transfer at their side, within their CPOMS 'Admin' area > 'Transfers' tab.

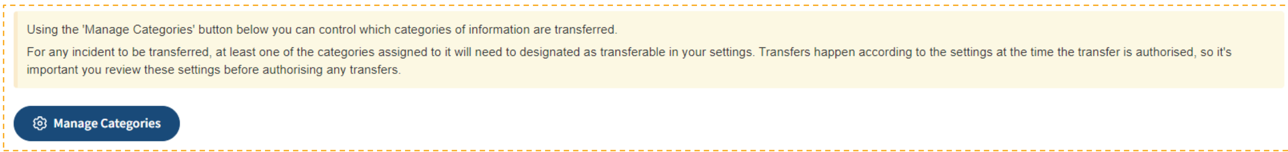
On request, the previous establishment will receive a similar notification, this time to **'Authorise'** the transfer at their side, again within the 'Admin' area > 'Transfers' tab.



> ***Before you authorise any Transfers for students leaving your establishment***, *please make sure you have double checked your '**Manage Categories'**, within the CPOMS '**Admin'** area > '**Transfers'** tab.*
>
> *By default, categories will not be selected, therefore it is imperative that you choose which categories of incidents/ actions you wish to transfer to the new establishment.*

Once the previous establishment clicks to authorise, the new establishment will receive the student's incident history, and any attached documentation/ files within their document vault.

21.2 Transfer Preferences – Manage Categories



Each establishment must apply their own preferences so that only certain categories are transferred. This can be set by a CPOMS **Admin Key Holder** within the establishment's **'Admin'** area > **'Transfers'** tab, by clicking on the 'Manage Categories' button. Simply tick the categories that you would like to transfer and choose to **'Update Categories'**.

Please be aware, when you add new categories to the system you will need to check and update your transfer 'Manage Categories' to include the new category(s) in future transfers should you wish to.

*If you do not tick any categories within your **'Manage Categories'** section, and click to authorise a transfer in CPOMS, the receiving establishment will not receive any incidents relating to the student.*

Once a transfer has been sent/ authorised it cannot be re-tracted or re-sent.

21.3 What information is transferred via CPOMS?

Once a transfer has been requested by the student's new establishment and authorised by their previous establishment, the student's incident history, plus any files/ documentation within their document vault will be sent across to the new establishment's CPOMS system. This will be the incidents/ actions assigned to the establishment's chosen categories in their own 'Manage Categories'.

Any linked student names, to the left of the incident text, will be hidden.

The name of the staff member who logged the incident, to the left of the incident text, will change to the previous establishment's name (i.e. the school name who authorised the transfer).

The incident text will send on (transfer) exactly as it is written.

Before authorising a transfer, we would always suggest that you double check the students 'Incidents' tab and document vault to ensure that all required names are removed from the text. If you do then find a name that you need to alter you can choose to 'Edit' the text of the incident to use initials for any names or use a different term such as mum/ dad/ brother/ sister, for example. If this is required by your internal procedures.

Once you are happy with the incident text and documentation you may click to authorise the transfer.

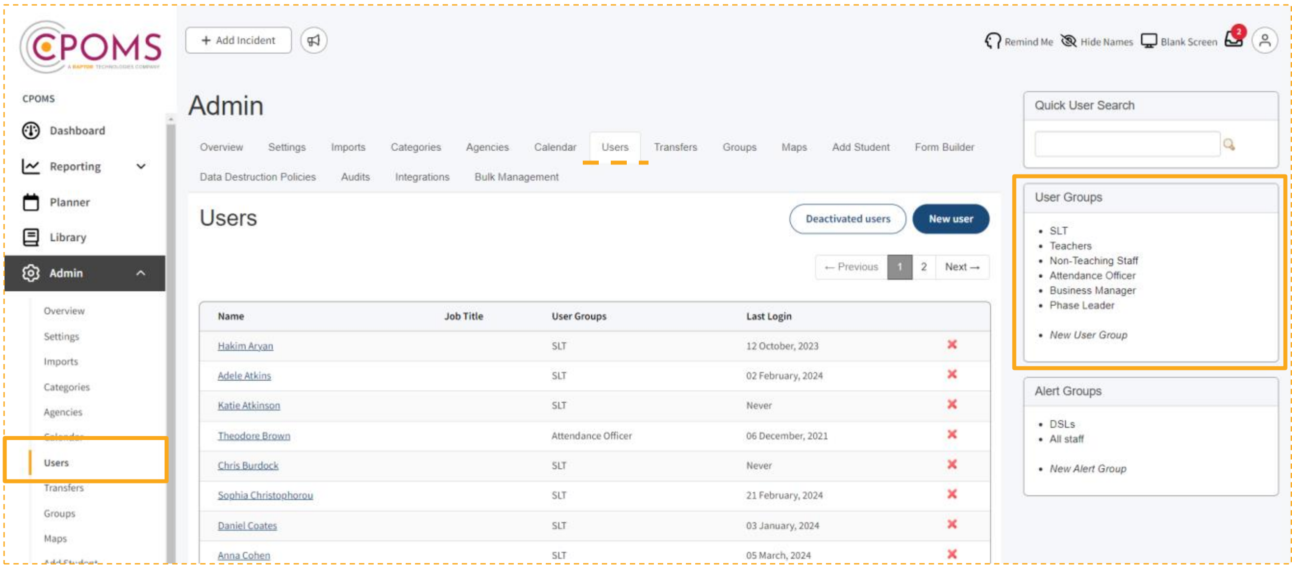
21.4 How to access the transfer information

Once the transfer status changes to ‘Transferred’, the new establishment will receive the student’s transfer information.

The establishment’s/ student’s previous incident categories are brought across to CPOMS also, under a main category of 'Legacy', with sub-categories of the previous establishment’s category names.

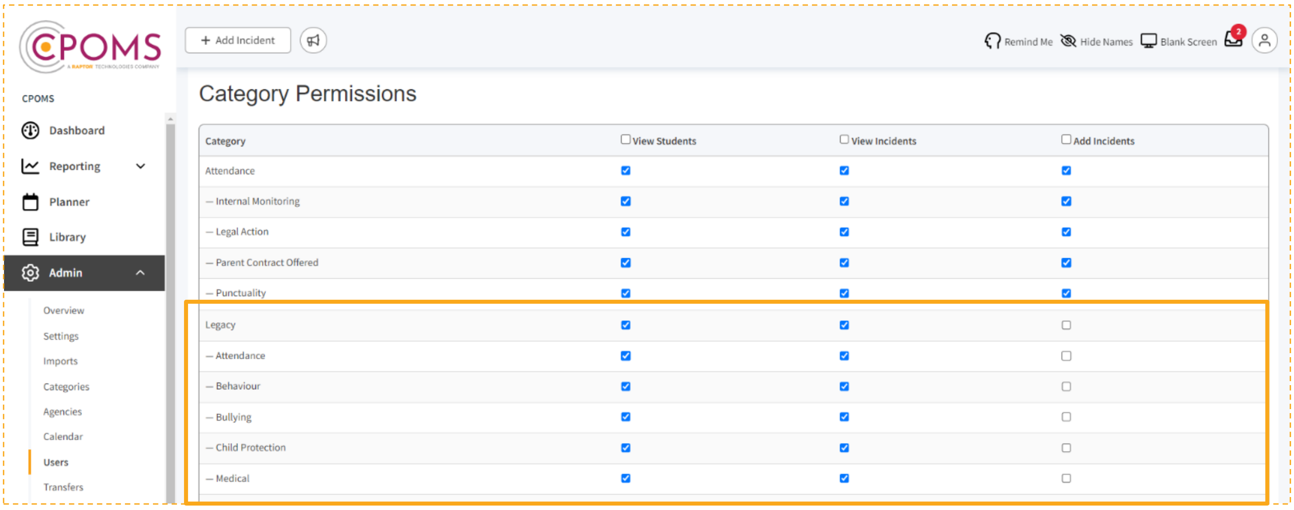
The Legacy categories are automatically deactivated, and the permissions are set to blank, to ensure that no new incidents can be logged against them and that only the correct level of staff at the new establishment can access the transferred information.

Therefore, in order to gain access to the transferred information, a CPOMS **Admin Key Holder** needs to set the permissions for each Legacy category, and any sub-categories within the **'Admin'** area > **'Users'** tab, by clicking into the top-level User Group name, *i.e. SLT*, to the right-hand side of this page.



Within the User Group **‘Category Permissions’** please tick **'View Students'** and **'View Incidents'** against each Legacy category, and any sub-categories, ensuring you **‘Save Group’** once ticked.

Please leave the **'Add Incidents'** column **un-ticked** so no new incidents can be logged against them. *(See below screenshot)*



*Once the category permissions have been switched on, the transferred information will appear within the students profile > **'Incidents'** tab in date order, and any files within their **'Document Vault'** tab.*

21.5 A transfer is not showing for me to request/ authorise?

For a transfer to be detected in CPOMS:-

- **There must be a matching value on both CPOMS systems.**

  CPOMS currently supports UPNs and ULNs, so either of these values must be the same on both CPOMS systems. Please ensure this by looking at the student's CPOMS record > 'Overview' tab.

- **The previous establishment must have the student archived in their CPOMS system.**

  CPOMS student archiving will take place once the MIS imports detect that the student has left the previous establishment. To check this in CPOMS, simply search for the child, choosing to 'Include archived students'.

- **The receiving establishment must have the student active in their CPOMS.**

  CPOMS will import the student from the MIS once their start date is reached. Simply search for the child within CPOMS, to ensure they have imported (with a matching value as above).

- **The UPN must not be a temporary UPN.**

  CPOMS will not detect a transfer using a temporary UPN as the matching value. Temporary UPNs usually have a letter at the end, typically an 'A'.

- **The previous establishment must have incidents and/or documents related to the student in their CPOMS.**

CPOMS student transfers do not detect if there is no information to transfer. The previous establishment can take a glance at the student's CPOMS record to see if there is any information present.

Please note, the new establishment must firstly request the transfer to start the process.

21.6 Transfer Status

When a transfer appears within the Admin > Transfers section, it will have a 'Status' so you can easily see which stage it is at in the transfer process:-

Status	Definition
Pending	The transfer has been detected on both establishment's CPOMS systems. Ready for 'New' ('Incoming') establishment to click 'Request'.
Rejected	'New' establishment requested transfer information, 'Previous' establishment chose to 'Reject' the request. Check with the other establishment for reason why it was rejected.
Dismissed	'New' establishment does not want to receive the transfer information. This may be because the child did not eventually go to that establishment.
Requested	Awaiting 'Previous' ('Outgoing') establishment to click 'Authorise'.
Transferred	The transfer has been requested and authorised by both establishments, and the information has been transferred to the 'New' establishment's CPOMS system. Please see **How to access the transfer information** if you are unsure how to view it.
Obsolete	The student is archived on both 'Previous' and 'New' establishment's CPOMS system. No action available.

21.7 Transfer Direction

Each transfer will also have a 'Direction':-

Direction	Definition
Incoming	The establishment with the direction 'Incoming' will receive the transfer information. They are the child's 'New' establishment.
Outgoing	The establishment with the direction 'Outgoing' will transfer their CPOMS information, for that student, to the 'New' establishment. They are the child's 'Previous' establishment.

21.8 The new school does not use CPOMS?

If a student's new school does not use CPOMS, you can run a full student report in CPOMS, and either print a hard copy, or send on electronically.

Please see below instructions to run a full student 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.
- 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. You may also wish to choose to **Hide Student and/ or Staff Names** in the report.
- *For all records please ignore the further filter options, **or** you may apply specific dates or select certain categories within the 'Filter incidents' options.*
- 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'**.

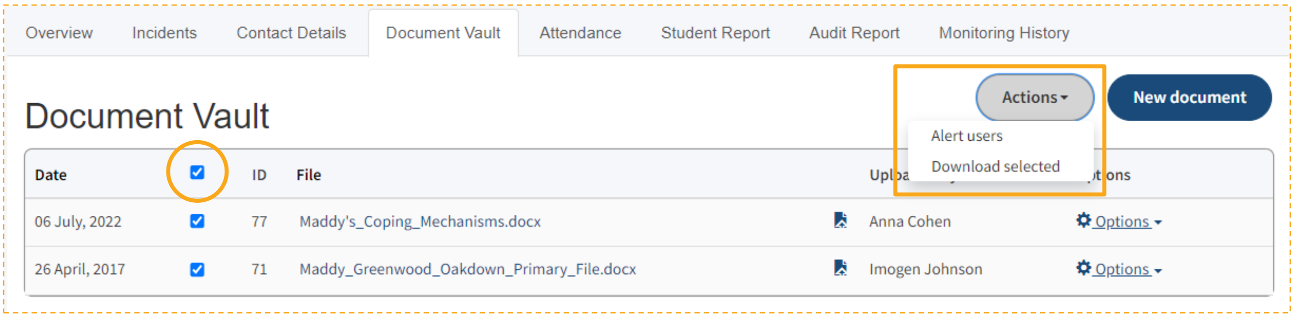
This will then generate a PDF copy of the student's incidents which you can then print or save electronically.

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

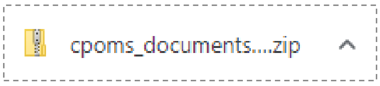
Once you have run the student report, you may wish to download the student's documents/ files as well.

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 Student Report

When you are running the 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 **not** hide shortened/ mis-spelled versions of the names if used, or the names of any other students who are not linked into the incident.*

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.

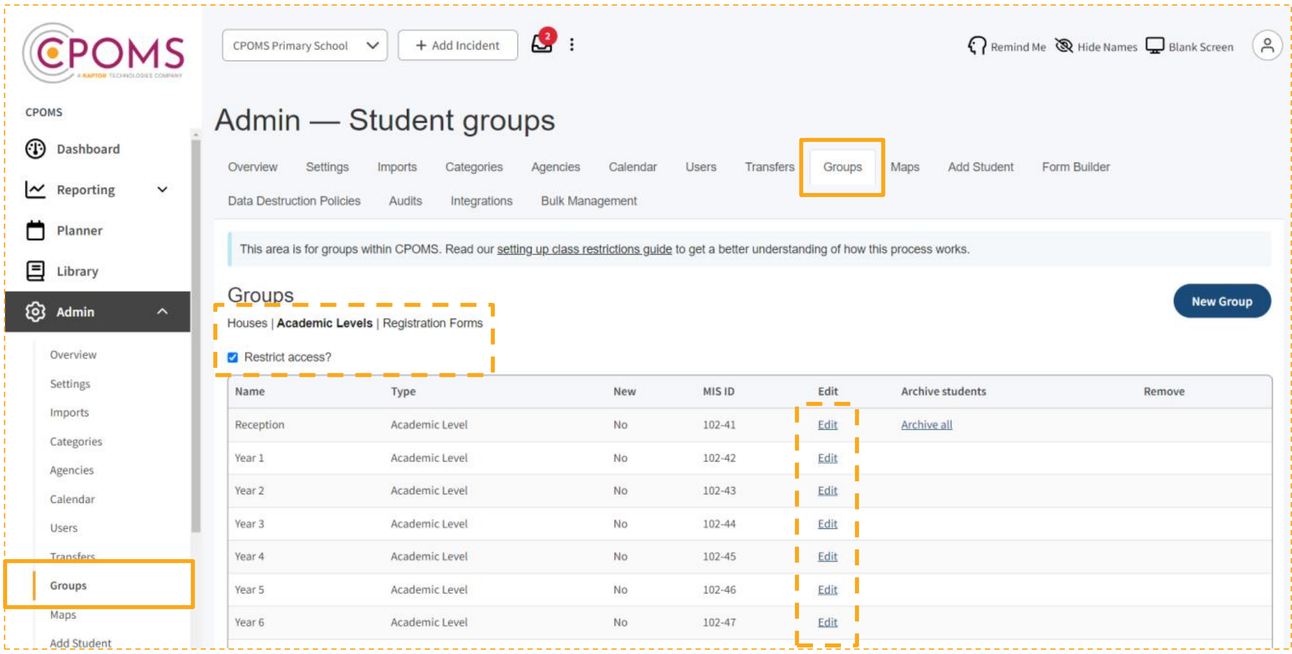
22 Groups

Within the **Groups** section, you can manage and update your key users class restrictions, if required.

This is handy to allow a class teacher to see their class only, or perhaps a Head of Year to access their year group information. You can also choose to restrict the categories these staff can access by the user group that they are placed in.

If you wish to restrict access by a group, simply tick the check box to **'Restrict Access'** by either Tutor Groups or Year Groups *(the group options will vary depending on the class structure in your MIS).*

N.B If class permissions are not setup, <u>every key holder in school will have access to all classes.</u>



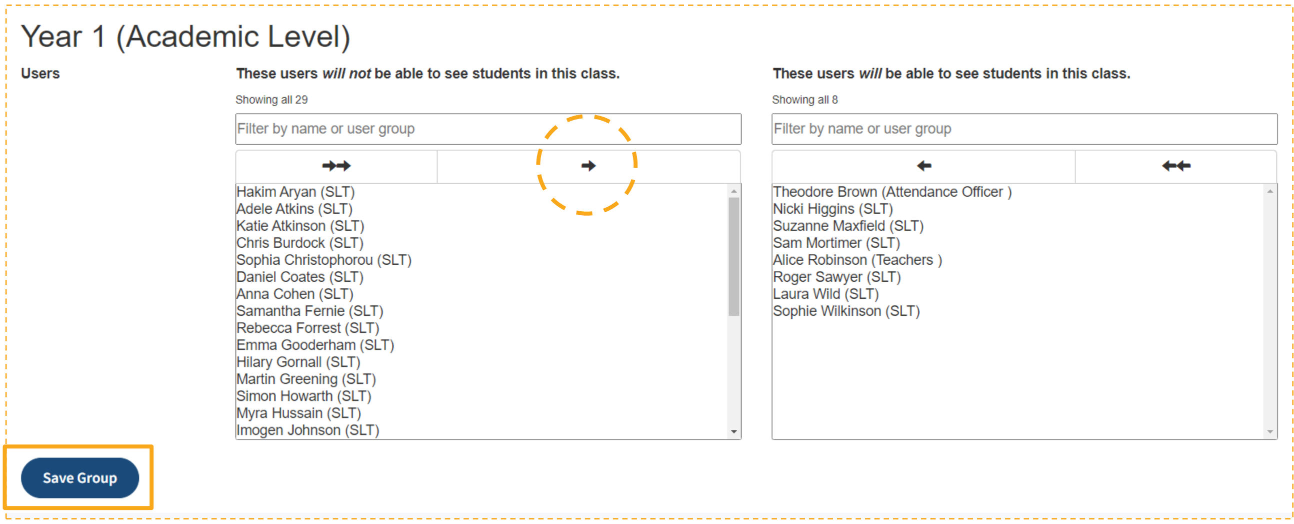
Once the class restriction setting has been switched on, you will then see an additional option to 'Edit' next to each of your group names. Simply click **'Edit'** next to each of the classes and select the staff members, or user groups, that you would like to be able to access that class.

You can do this in a variety of ways using our dual list boxes. In the boxes on the left hand side you will see a list of all staff members registered on CPOMS.

If you are happy for all staff to access that particular class select the double arrow button straight away, which will move the staff names to the right-hand box entitled 'These users will be able to see students in this class'.

If you only wish for particular members of staff to access the class you can select specific names from the list and click the single arrow to move them to the right-hand side.

You can also filter the list down by name, or user group, by simply typing in the 'Filter by name or user group' field and then moving the relevant staff names across.



Once you have made your choices select **'Save Group'** and repeat the process for all other classes. If these permissions change at any point you can always re-edit them.

N.B If you do have class permissions set up within CPOMS, any admin user will see a notice at the top of their dashboard whenever a new class has appeared in the import. The Summer MIS class promotion will likely affect key users if class permissions are turned on. In order to access pupil information, you will need to re-assign correct access levels to any new classes at the start of term.

If preferred, you can also amend class permissions within each individual users profile, within the **'Admin'** area, **'Users'** tab by clicking on the users name and selecting the **'Permissions'** section.

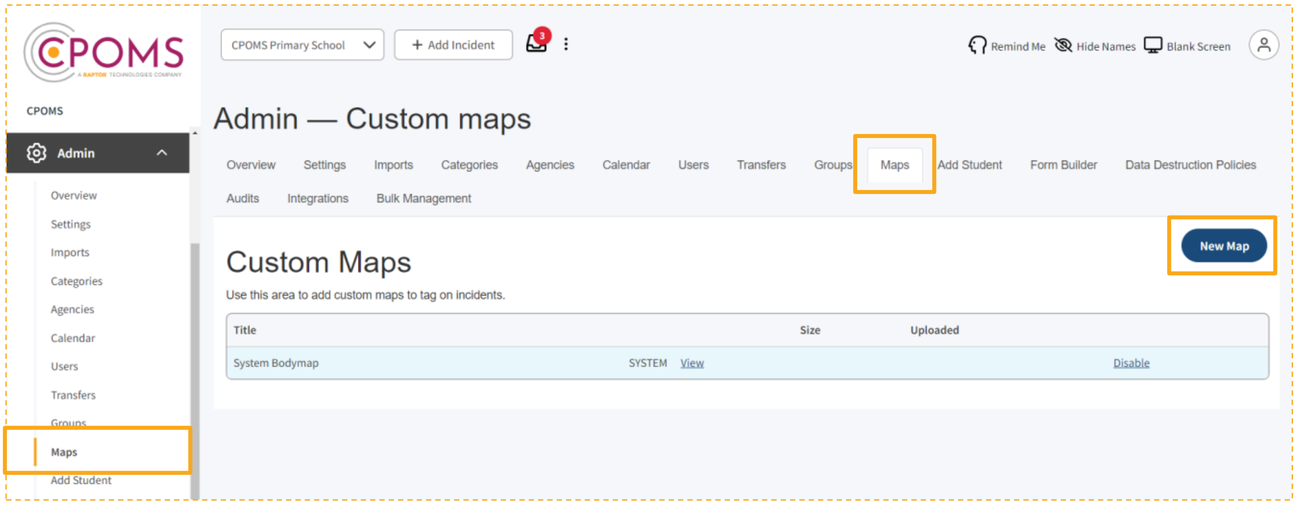
23 Maps

Within CPOMS you can add additional **'Maps'** of your own, which you can then place markers on when completing the 'Add Incident' form.

If you would prefer to use a different body map to our default one, you can add your own here.

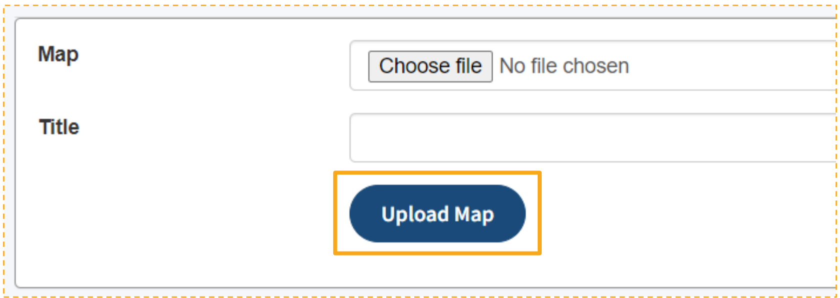
You may wish to add additional maps which focus on a particular part of the body e.g. face, hand, foot to allow you to apply more accurate marker points to the image or a map of the school building to show where abouts an incident took place for example.

A CPOMS **Admin Key Holder** can add additional maps via **'Admin' > 'Maps'** by clicking on the **'New Map'** button.



Next, click on **'Choose File'** and locate the map image on your machine. *Please note, only jpeg. or png. file types will be accepted.* Once chosen, enter a **'Title'** for the map *(The title will appear on the Add Incident form alongside the map image).*

When you are ready click **'Upload Map'**.



Once uploaded the map will appear for use by all staff, within the 'Add Incident' form.

*If you would like to replace the default body map image with your own, simply delete/disable the default body map within **'Admin'** > **'Maps'** by clicking on the '**Delete/ Disable'** option at the end of its row and upload your replacement body map, as instructed above.*

24 Form Builder

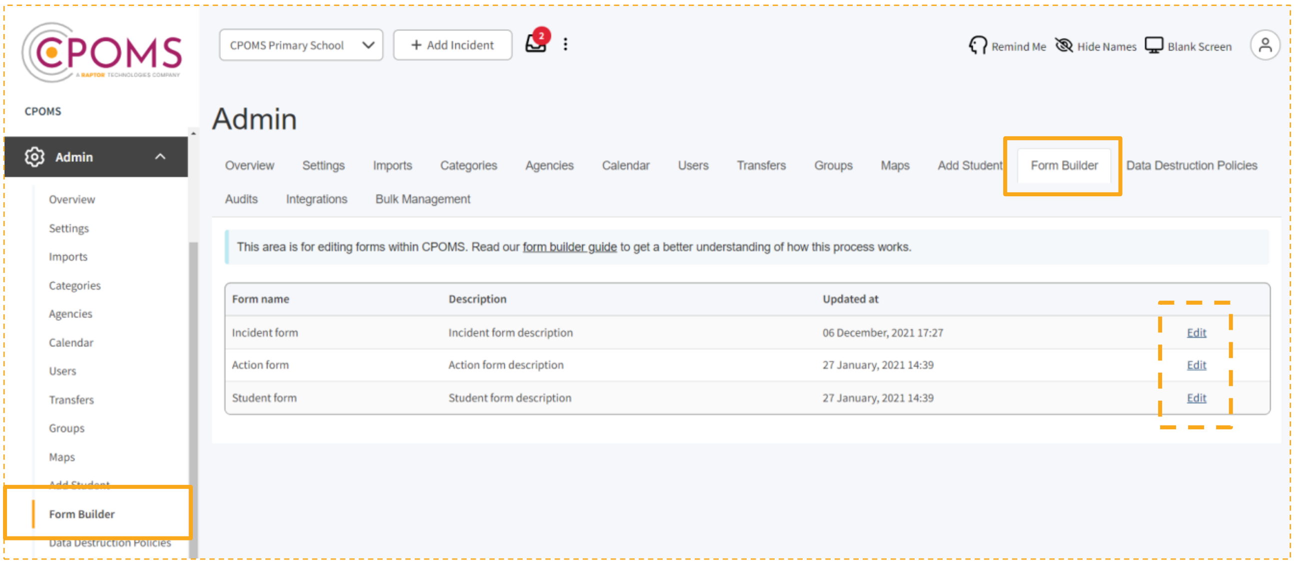
Custom Fields can be added to CPOMS by a CPOMS Admin Key Holder to your:- Incident, Action and Student forms.

This may be an additional drop-down list for the 'Location' of an incident i.e. Playground, Classroom, Toilets, Out of School, or a free text box to add a 'Summary' of an incident or action taken.

Using the Form Builder, you can also adjust the order of the form itself, and add additional 'Advice Messages' for staff i.e. 'Please include as much information as possible' for example.

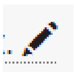
24.1 Amend a form

Step 1: To amend the order of a form, or create a new custom field please navigate to the **'Admin'** area > **'Form Builder'** tab and click **'Edit'** next to the name of the form you would like to amend/ add to.

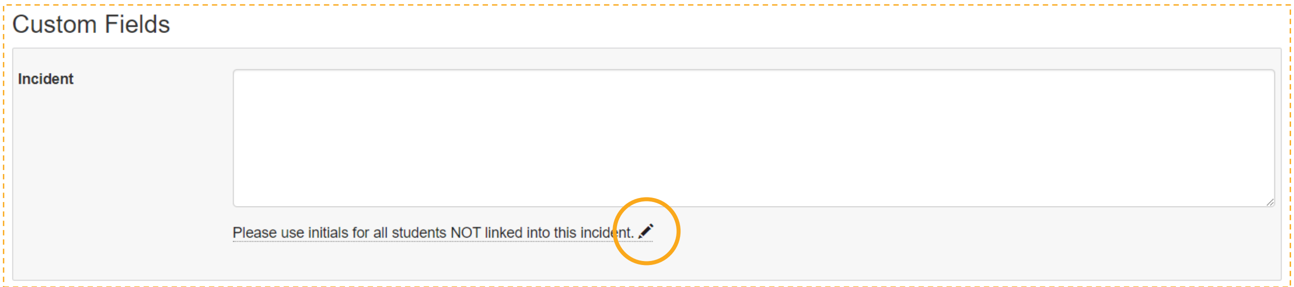


Here you can now drag and drop the form fields into your preferred order.

If you click on the pencil icon beneath any field you can add an additional 'Advice Message' for staff, i.e.

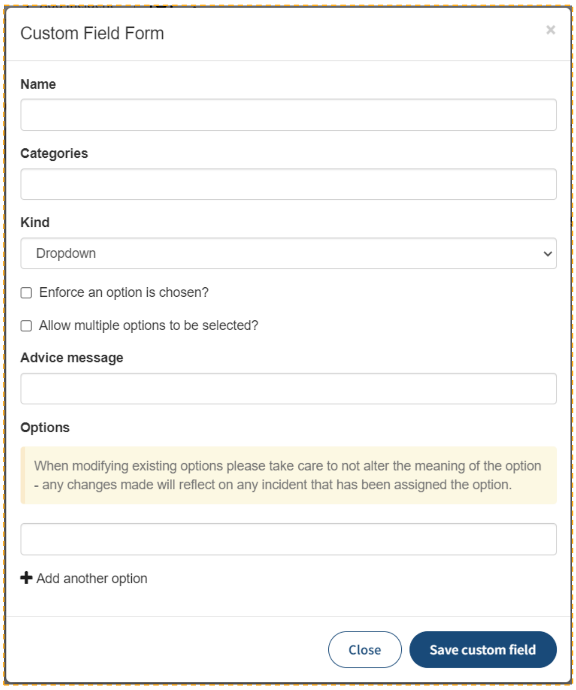


- *Please use initials for any students not linked into this incident.*
- *Please always alert the 'SLT' team for Safeguarding incidents.*



To add an additional Custom Field to the form, scroll down to the bottom of the page and click 'New custom field' (to the right-hand side).

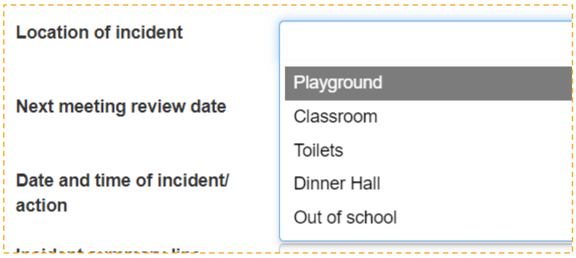
Step 2: Complete the 'New Custom Field' form



- Firstly enter the '**Name'** of your new custom field
- Under **'Categories'** you can choose which types of incidents you would like this field to appear for, *i.e.* Medical*, Behaviour only*. The field will then appear once this category(s) is chosen on the new incident/ action form. *Please leave this field blank if you would like the custom field to appear for all incident types.*
- Next choose the **'Kind'** of custom field from the available options, which are:-

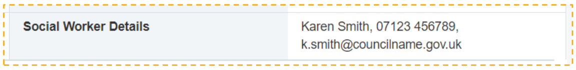
Dropdown – to create a dropdown list of pre-set options to choose from

Example, dropdown list of Location of an incident/ action



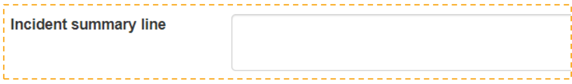
Text – to add an additional line for free text

Example, to enter a Social Worker name on a student's overview



Multiline text – to add an additional text box for more free text

Example, free text box for a summary of incident/ action



Date/Time – to add an additional date and time field

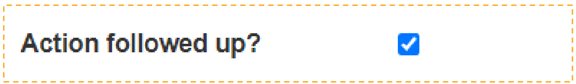
Example, to input the date and time the incident/ action took place

Date – to add an additional date field

Example, to enter the date of the next review meeting

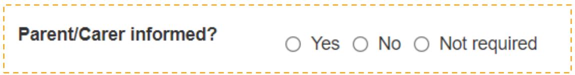
Checkbox – to add a tick-box

Example – 'Action followed up?'



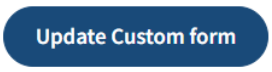
Radio button - to create a list of pre-set options to choose from

Example - 'Parent/Carer informed?'

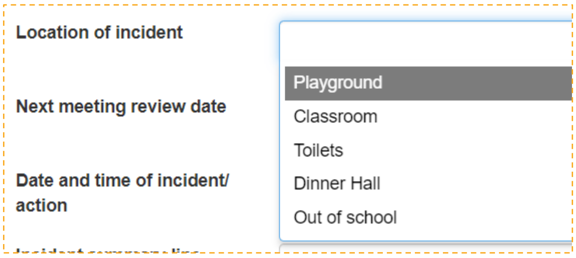


- **If you choose Dropdown** you will have the following additional check boxes:-
  - Enforce an option is chosen?
  - Allow multiple options to be selected?
- **For Dropdown and Radio Buttons** enter your 'Options' next – these will be the items you would like to display in your list.
  - You can add further options by clicking **'+ Add another option'**.
- For all new custom fields, you can also add an 'Advice message' for staff to read. This helps to ensure the field is completed correctly. The advice message will appear directly below the field on the chosen form.
- Once you have completed the form click **'Save Custom Field'**.

Step 3: IMPORTANT:- Once you have updated the form, scroll down to the bottom of the page again and click **'Update Custom form'** to save your changes. The custom field(s) will then be created and it will appear within the chosen form for staff to see/ select.

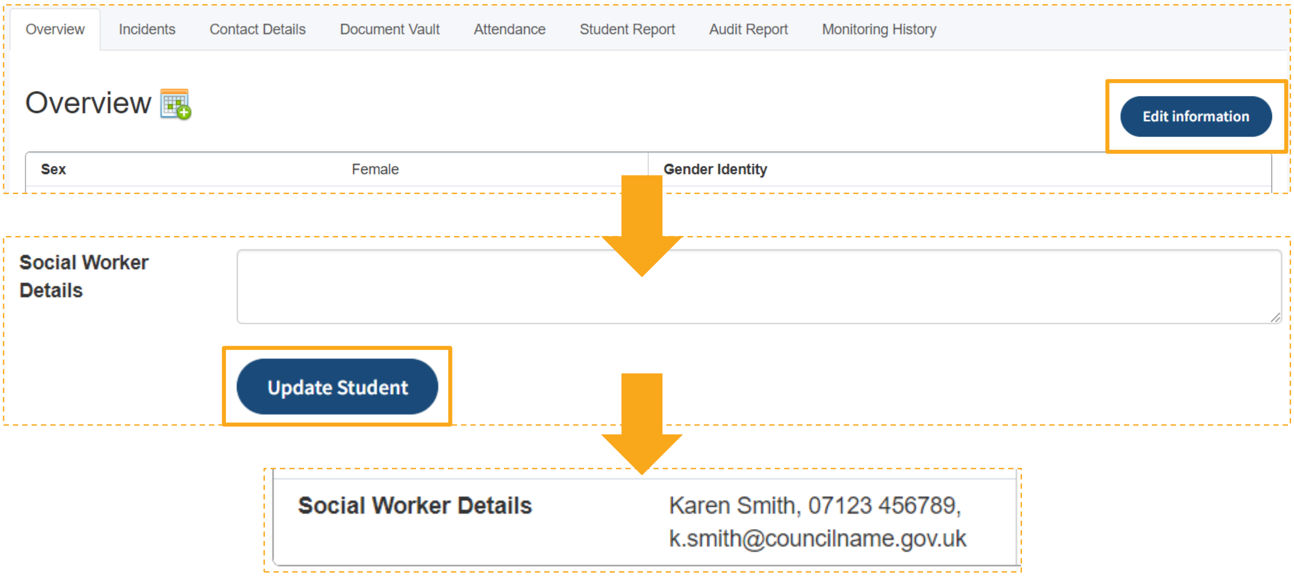


*Example custom field on **Add Incident** form*

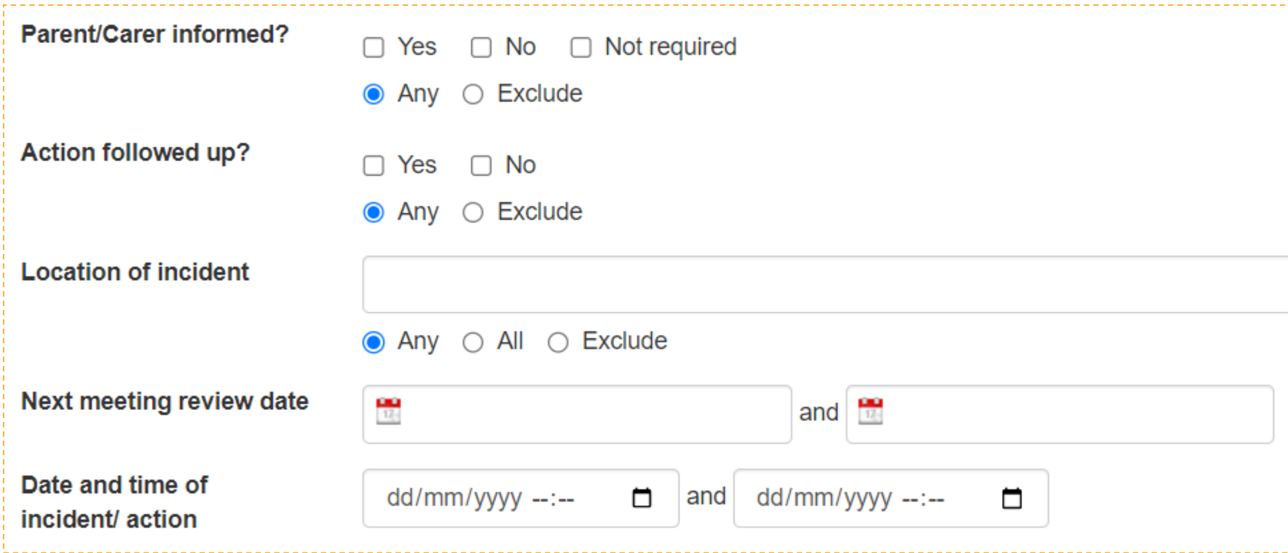


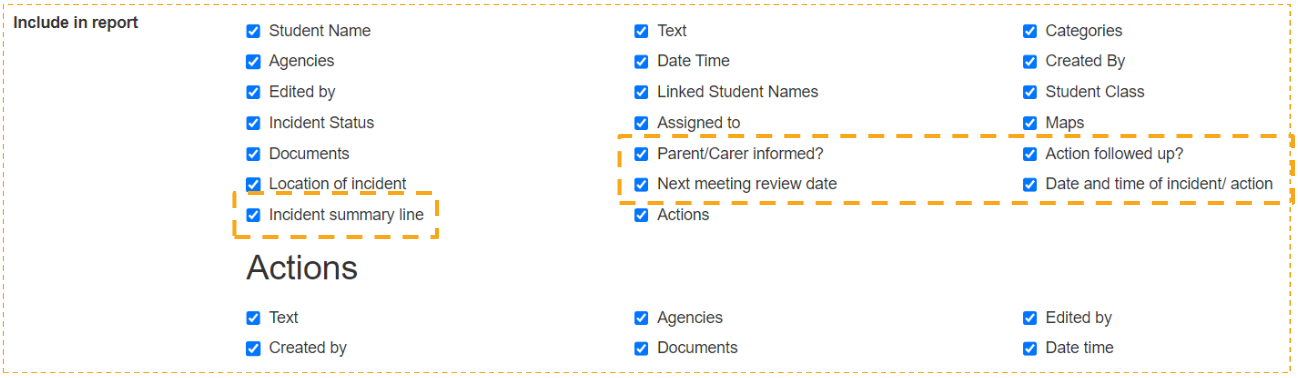
*Example custom field on **Student** form*

If added to the **Student Form**, the field will be available to use within each student's profile > **'Overview'** tab, by clicking the **'Edit Information'** button.



You may also report on Custom fields, they will appear for selection within the Filter by Student/ Incident options, or 'Include in report' checkboxes - depending on where the custom field was added to.





24.2 Managing your Custom Fields

You can view and edit your existing custom fields within the 'Admin' area > 'Form Builder' tab, by clicking 'Edit' next to the relevant form name.

If you hover your mouse over a particular custom field the follow icons will appear (to the right-hand side of the field) to allow you to amend , or delete the custom field.

Please be aware, if you choose to delete a custom field which has been in use, it will delete the custom field and all data input into this field in previous entries. **This is irreversible.**

25 Custom Field for 'People Involved' when using initials in incident text

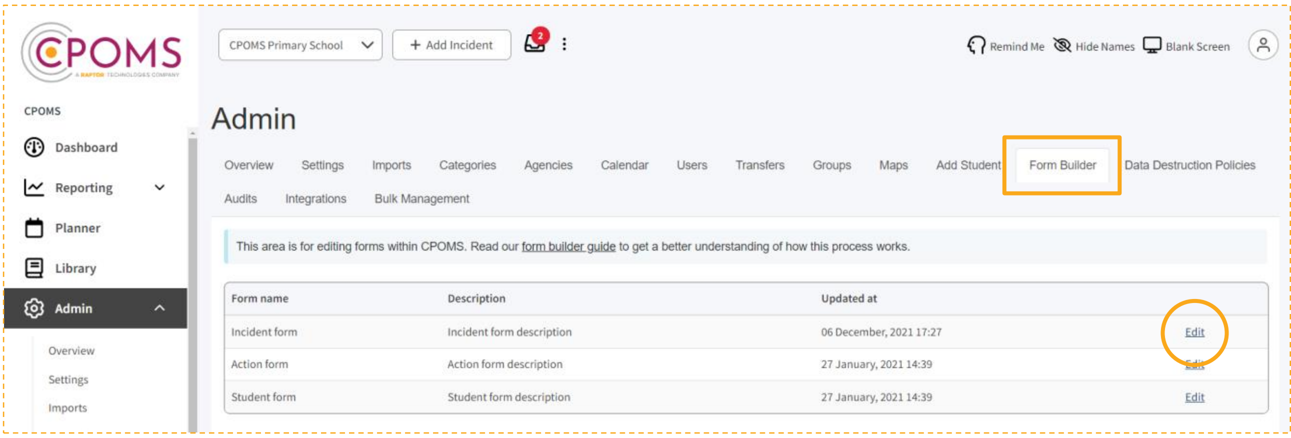
If your LA/ Safeguarding Advisor recommends the use of initials in incident/ action text, it can be useful to add a 'Custom Field' for 'People Involved' to use as a key.

i.e. *SM = Sue Maxfield*
LD = Laura Denby
Or
Pupil A = Sue Maxfield
Pupil B = Laura Denby

If you then need to refer back to the incident in the future, you can cross check the initials against the key.

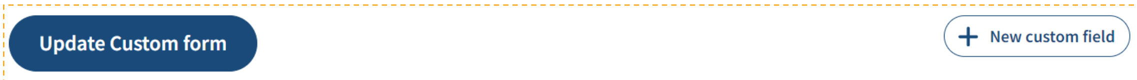
As the 'People Involved' is a custom field you can choose to not include it when running reports, i.e. for a Subject Access Request.

To create a 'People Involved' custom field, please go to **'Admin'** and select the **'Form Builder'** tab.

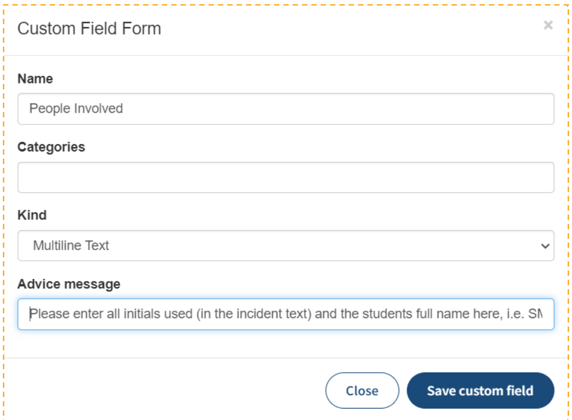


Click **'Edit'** next to the **'Incident form'.**

Scroll down to the bottom of the page and click on the **'+ New custom field'** button.



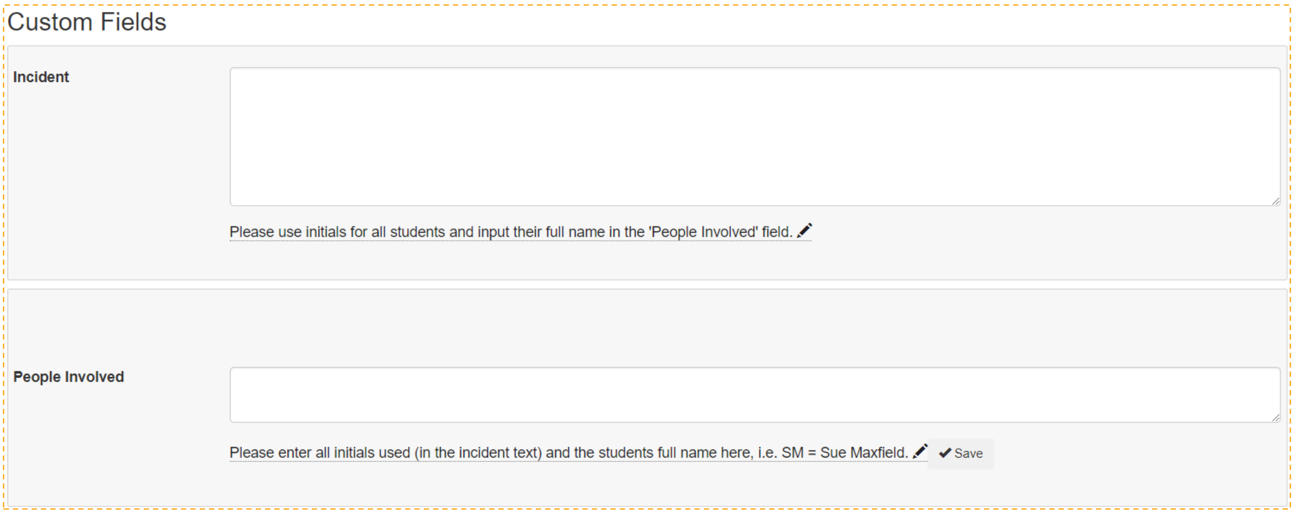
- Next, complete the 'Custom Field Form':-
- **Name** - enter a name for the custom field, *i.e. People Involved.*
- **Categories** – leave blank, unless you want this field to appear for certain categories only.
- **Kind** – choose 'Multiline Text'.
- **Advice message** - enter an advice message of your choice to guide staff when completing this field *i.e. Please enter all initials used (in the incident text) and the students full name here, i.e. SM = Sue Maxfield.*
- And click **'Save custom field'.**



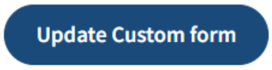
If you would prefer for the field to appear elsewhere on the incident form *i.e. directly beneath the incident text box*, you can drag and drop the field elsewhere.

You may also wish to add an additional 'Advice message' beneath the 'Incident' field for something along the lines of:- *Please use initials for all students, and input their full name in the 'People Involved' field.*

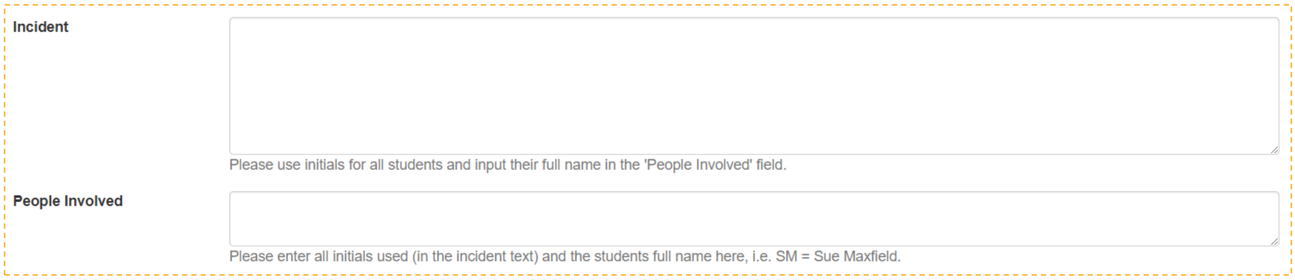
Click on the small pencil icon beneath the 'Incident' field to add one.



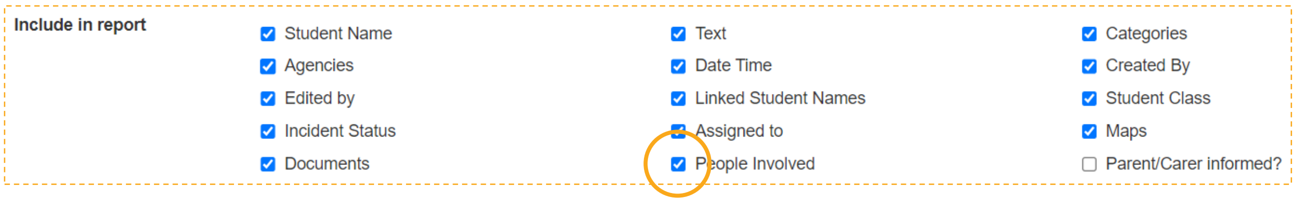
Once you have updated the form, scroll down to the bottom of the page again and click **'Update Custom form'** to save your changes.



The field and your advice notes will now appear on the 'Add Incident' form for all staff.



When running reports on Incidents, you can then tick to include, or un-tick to not include, the 'People Involved' field/ key depending on the type of report you are running.



26 Integrations

Classroom.cloud, Community Brands, eSafe, Securus, Senso, Smoothwall Monitor, teamSOS, Trackit Lights and youHQ integrations are possible within CPOMS for the purpose of delivering information from 3rd Party Integrators into CPOMS.

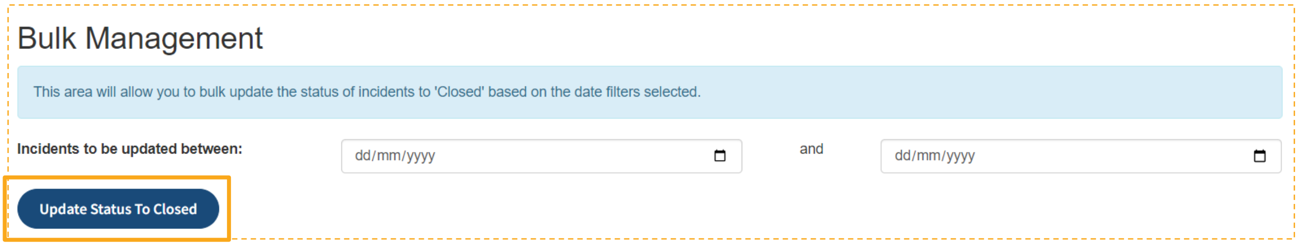
Integrations can be requested from directly within your CPOMS ‘Admin’ area and once submitted, the integration will be established automatically against the parameters you have created. 3rd party integrators can at no time see any information that you have stored in CPOMS and will only have the ability to send relevant information from their side into the relevant student chronology within CPOMS.

27 Bulk Management

An Admin Key Holder can bulk close incidents via the ‘Admin’ area > ‘Bulk Management’ tab.

Simply enter the time frame you wish to close incidents between and click ‘Update Status To Closed’ when you are ready. Once this is selected, the status of all incidents within the timeframe will change to ‘Closed’.

<u>Please be aware this action is irreversible.</u>



28 CPOMS Authenticator App – Setup and FAQs

28.1 How to setup a 'Soft Key'

Step 1 - Download the CPOMS Authenticator App

The new soft key user must firstly download the 'CPOMS Authenticator' app to their chosen device, i.e. their smart phone, tablet or iPad.

You can find the CPOMS Authenticator app by simply searching for the name in your app store, or by using one of the below hyperlinks:-

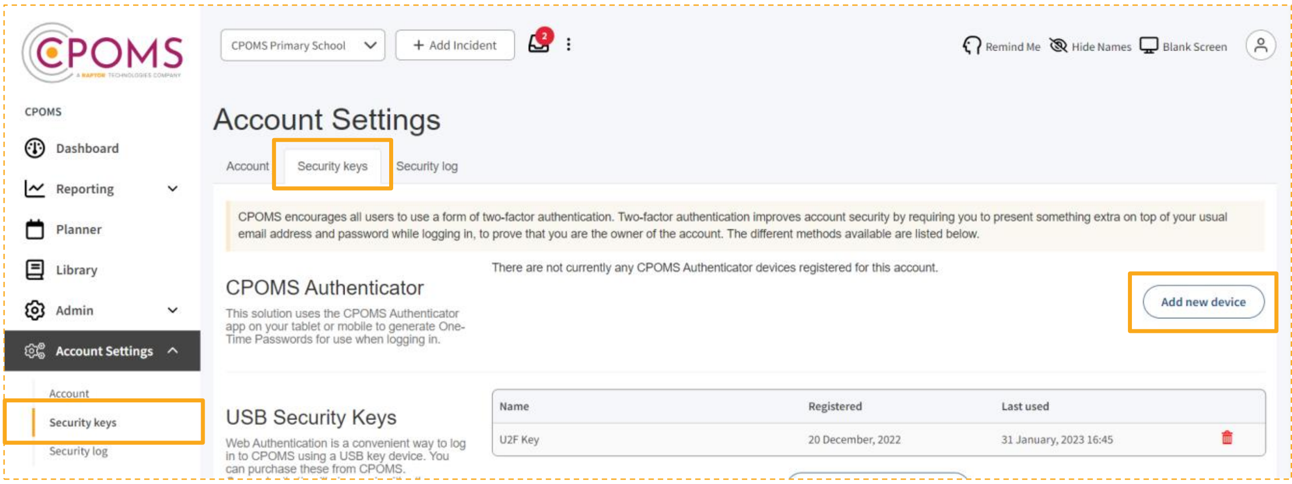
Apple App Store	https://apps.apple.com/gb/app/cpoms-authenticator/id1093080934
Google Play	https://play.google.com/store/apps/details?id=uk.co.meritec.cpomsauthenticator&hl=en_GB

Step 2 - Log in to your CPOMS Account

Once you have downloaded the app, please log in to your CPOMS account, on a separate device to the one you have downloaded the app to. If you already have an existing key, please log in with it.

> If you are using CPOMS for the first time, you will need to request an initial password to log-in firstly, by clicking on the **'Forgotten your password or using CPOMS for the first time?'** option, at your schools CPOMS login page and following the simple steps.

Once you have logged in to CPOMS, click on the **'Account Settings'** section, and then click on the **'Security Keys'** tab. Under the sub-heading for CPOMS Authenticator, please click on **'Add new device'**.



Once you have clicked on ‘Add new device’, it will create a QR code for you to scan within your CPOMS Authenticator App.

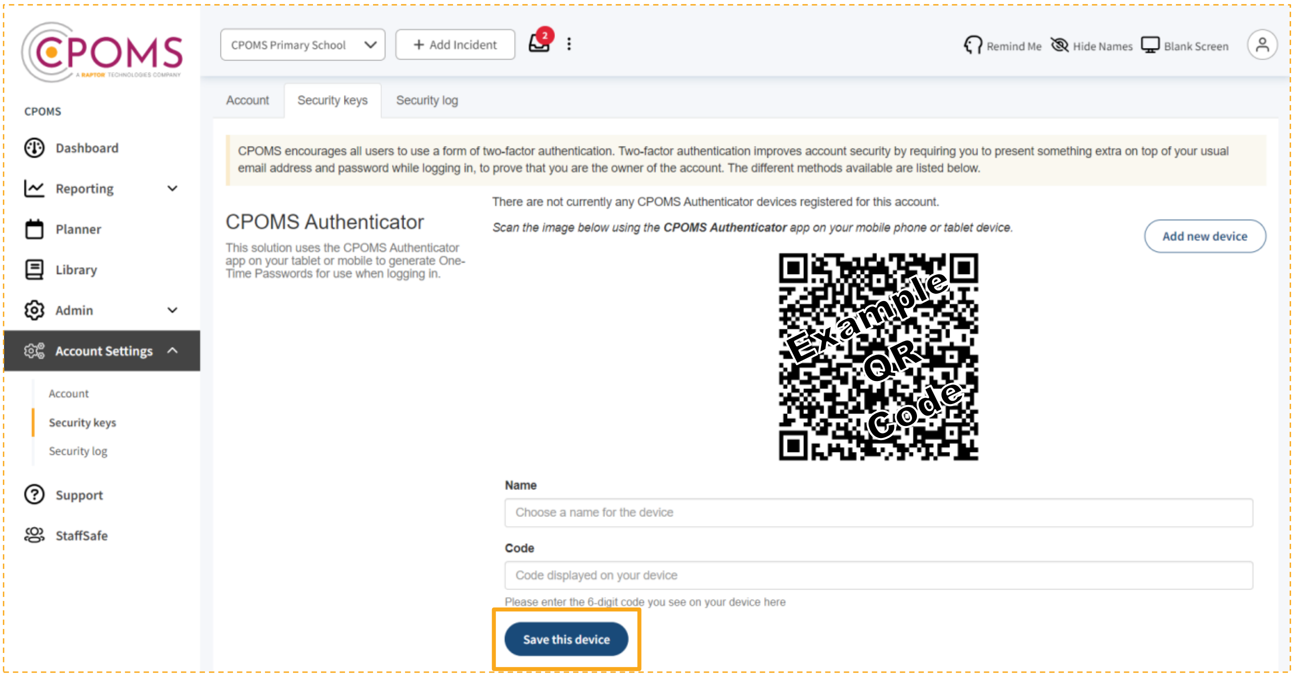
To scan the QR code, simply open up the app and tap the **‘Scan QR Code’** message. Now point your device camera towards this image. Once the app has scanned the QR code, it will begin generating random numbers. For security purposes, the numbers will change every 30 seconds as the circle goes round.

***Please continue with the below points to ensure your app is setup correctly and saves to your account.**

Next, beneath the QR code image on screen, enter a **‘Name’** for your device i.e. iPad/ My Phone.

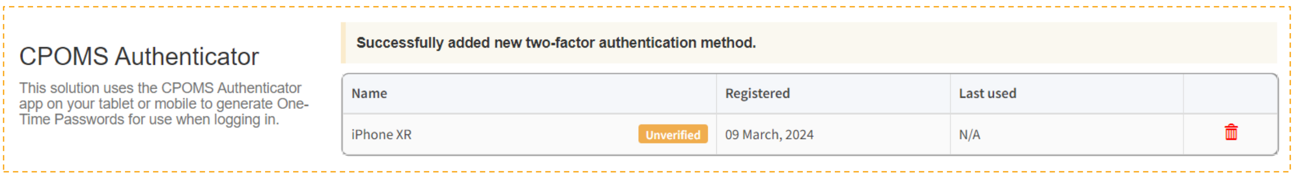
In **‘Code’** type in the current 6-digit code which is appearing in your app.

Lastly click **‘Save this device’**.



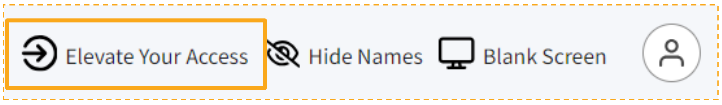
Once saved, your new Soft Key will appear listed in the CPOMS Authenticator section.

Unverified *will appear next to its name until you use the app to login, this is nothing to worry about.*



Step 3 - Elevate your Access

To elevate your access, please click on **'Dashboard'** to the top left of the screen in CPOMS, *to refresh your page*. To the top right-hand corner of your CPOMS screen, you should now have a **'Elevate Your Access'** option to click on.



Once selected, **enter the 6-digit number** appearing on your app currently, and click **'Authenticate'.** *If you were already logged in with a different key, the 'Elevate Your Access' option will not appear.*

If you are in a higher level user group, your access will now change to reflect your user group permissions.

When you log in to CPOMS in the future, your app will give you the option to 'approve' or 'deny' a log in, rather than typing in the code manually each time. Alongside this option, it will display the approximate location of where the login took place (based on the IP address), so you can easily differentiate whether it was you who initiated the login before you choose to click 'approve'.

Permissions

Access permissions in CPOMS are set by the User Group the user has been placed in.

A CPOMS Admin Key Holder can check and update permissions via the CPOMS **'Admin'** area > **'Users'** tab.

Your current user groups will be listed to the right-hand side of this tab under the title **'User Groups'**. To check, or edit, a user group, simply click on the relevant user group name here - *or you may create a new one if required under the 'New Group' option.*

To change an existing users User Group - Go to **'Admin'** > **'Users'** and click on the user's name from your list of users. In their profile, click on the **'Permissions'** tab, amend their user group from the drop-down options available and **'Save details'**.

If you would like to restrict your key users by class or year group under **'Admin'** > **'Groups'**. Full instructions for this process can be sent on request.

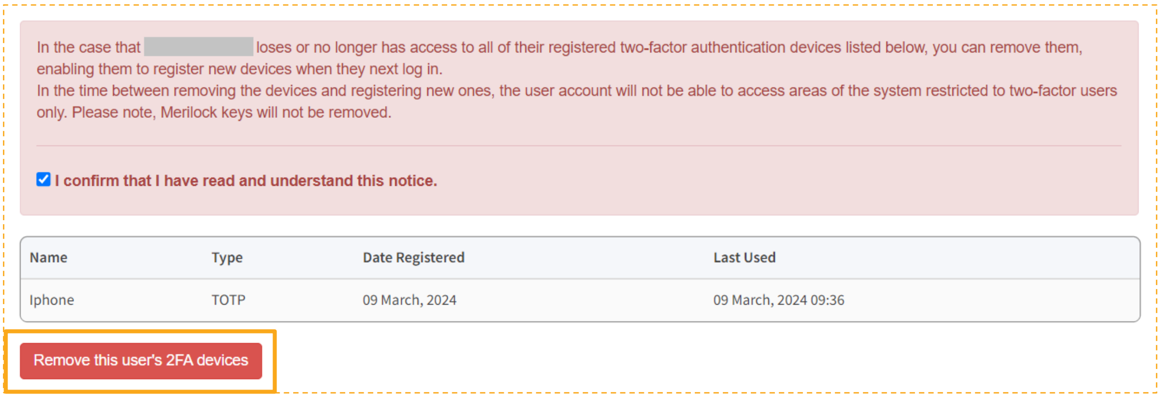
CPOMS ‘Soft Key’ - FAQs

I have got a new phone?

If you have got a new phone and no longer have access to your previous Soft Key/ App, to set up your new phone you must firstly **remove your previous key.**

A CPOMS **Admin Key Holder** in school can remove the key for you, within the **‘Admin’** section, **‘Users’** tab by clicking into your/ the user’s name (into your/ the user’s profile) and **‘Security Keys’**.

Tick **‘I confirm that I have read and understand this notice’**, and the **‘Remove this user’s 2FA devices’** button to remove the key from the user’s profile.



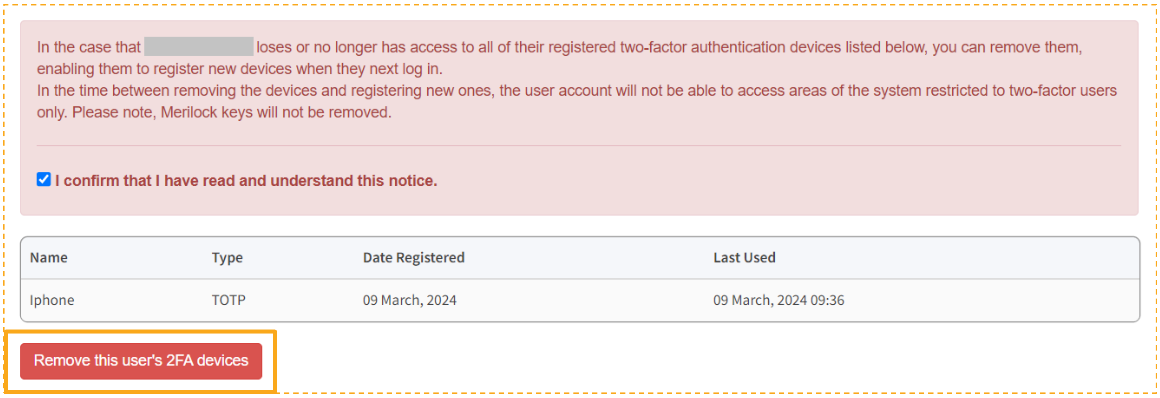
Once the previous key has been removed, you may setup a new Soft Key following the original CPOMS ‘Soft Key’ Setup instructions (click here). *Please log out and back in before you begin this process.*

My app is asking me to ‘Scan QR Code’?

If your app reverts to the ‘Scan QR Code’ message, it means your app needs to be reconfigured. To do this, you must firstly **remove your previous key.**

A CPOMS **Admin Key Holder** in school can remove the key for you, within the **‘Admin’** section, **‘Users’** tab by clicking into your/ the user’s name (into your/ the user’s profile) and **‘Security Keys’**.

Tick **‘I confirm that I have read and understand this notice’**, and the **‘Remove this user’s 2FA devices’** button to remove the key from the user’s profile.



Once the previous key has been removed, you may setup a new Soft Key following the original CPOMS 'Soft Key' Setup instructions (click here). *Please log out and back in before you begin this process.*

I cannot access 'Security Keys'?

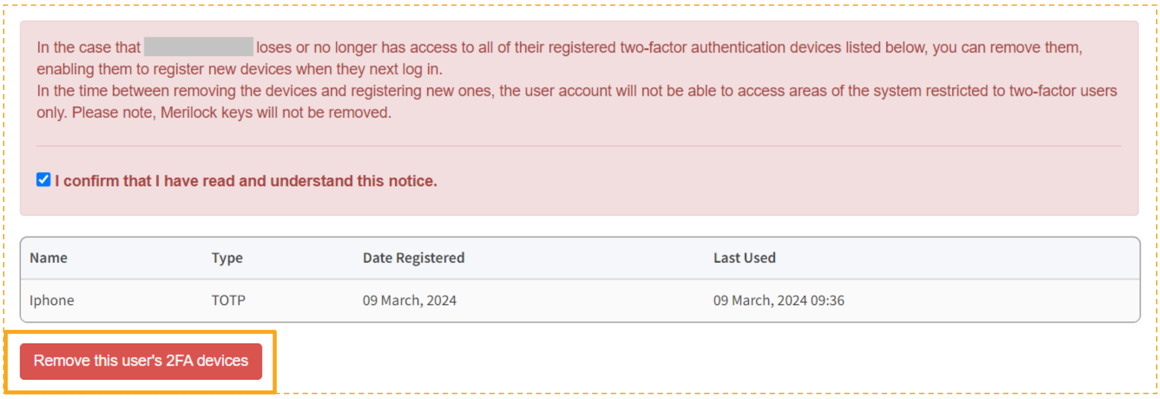
If you cannot click on the 'Security Keys' tab (within 'Account Settings') to set up a Soft Key, it may be that the system thinks you have a key already. This can occur if perhaps you started the process previously or have got a new phone, or that you have logged in without using your current key.

If you still have access to the previous key please click **'Elevate your access'** to the top right.

If you do not have access to the previous key, you must **remove the previous key** to start the process again.

A CPOMS **Admin Key Holder** in school can remove the key for you, within the **'Admin'** section, **'Users'** tab by clicking into your/ the user's name (into your/ the user's profile) and **'Security Keys'**.

Tick **'I confirm that I have read and understand this notice'**, and the **'Remove this user's 2FA devices'** button to remove the key from the user's profile.



Once the previous key has been removed, you may setup a new Soft Key following the original CPOMS 'Soft Key' Setup instructions (click here). *Please log out and back in before you begin this process.*

My location on the app is not accurate?

The location shown on the app is actually taken from the location of your I.P address, so it can sometimes appear to be further afield.

To put your mind at rest you can check the location of your I.P address before choosing to 'approve'.

Simply search 'What's my IP' in a search engine (i.e. Google) on your app device and click on https://whatismyipaddress.com, which is usually the first result. This will then confirm the location of your I.P address, which you can check matches against the location shown in your app.

Or if you would prefer, you can choose to type in the numbers manually into CPOMS, rather than clicking on the approve option.

Error message 'Incorrect or out of date code'?

If you receive an error message which says 'Incorrect or out of date code', when logging in to CPOMS with your key, it means the date and time on the device of your app is out of sync with our servers (it may be slightly fast or slow).

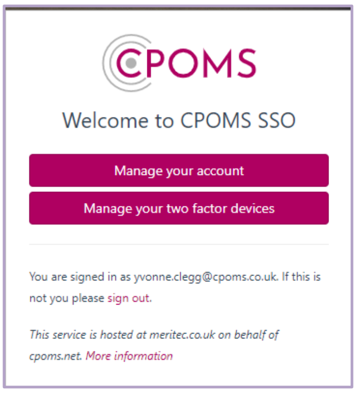
Usually the way to fix this is to amend the date and time setting on the device of your app to 'set automatically'. This ensures the date and time is set identically to our servers.

Error message 'No usable date' when trying to scan the QR code?

This sometimes occurs if you are trying to scan the QR code via the normal camera on your device, rather then through the CPOMS Authenticator App. To scan the QR code, please ensure you have firstly opened the CPOMS Authenticator App, and tapped 'Scan QR Code'. Please then point the camera toward the QR code image when prompted.

SSO Users

If you have an SSO account (Single Sign On) then we have a self service portal where you can manage your SSO account. Here you can change your email address and manage your 2FA device. This can be accessed via:- https://auth.meritec.co.uk/.



29 U2F Key setup

If you have been given a U2F key, for two factor authentication use, it must firstly be linked to your CPOMS account.

Before you begin, please ensure that you are using an up-to-date version of **Google Chrome or Firefox.** *U2F technology is not currently supported by Internet Explorer or Safari.*

Please note, that each new U2F key holder must **set up their own key**.

Step 1 - Log in to your CPOMS Account

Please log in to your CPOMS account, if you already have an existing key, i.e. *a Soft Key or another USB key*, please log in with it.

> If you are using CPOMS for the first time, you will need to request an initial password to log-in firstly, by clicking on the **'Forgotten your password or using CPOMS for the first time?'** option, at your schools CPOMS login page and following the simple steps.

Step 2 – Go to 'Account Settings' > 'Security Keys'

Once you have logged in to CPOMS, click on the **'Account Settings'** section and then click on the **'Security Keys'** tab.

Under the sub-heading for **U2F Keys**, please click on **'Register a new U2F key'.**

A pop-up will then appear where you will be asked to choose a **'Device Name'** for the key, *i.e. U2F Key*, and **'Start Registration'**. You will then be prompted to insert the U2F key into your PC or laptop, and press the gold disc to link this key to your account.

If Windows Security asks you to create a PIN, enter one and click OK (this option does not appear in all versions of Windows). Your PIN is stored locally on your security key.

Once complete, the pop-up will say 'Successfully added new U2F key. You can now close this window'.

Step 3 - Elevate your Access

To elevate your access, please click on **'Dashboard'** to the top left-hand corner of the screen in CPOMS, *to refresh your page*. To the top right-hand corner of your CPOMS screen, you should now have a **'Elevate Your Access'** option to click on. Select this and follow the on-screen instructions. *If you are already logged in with a different key, the 'Elevate Your Access' option will not appear.*

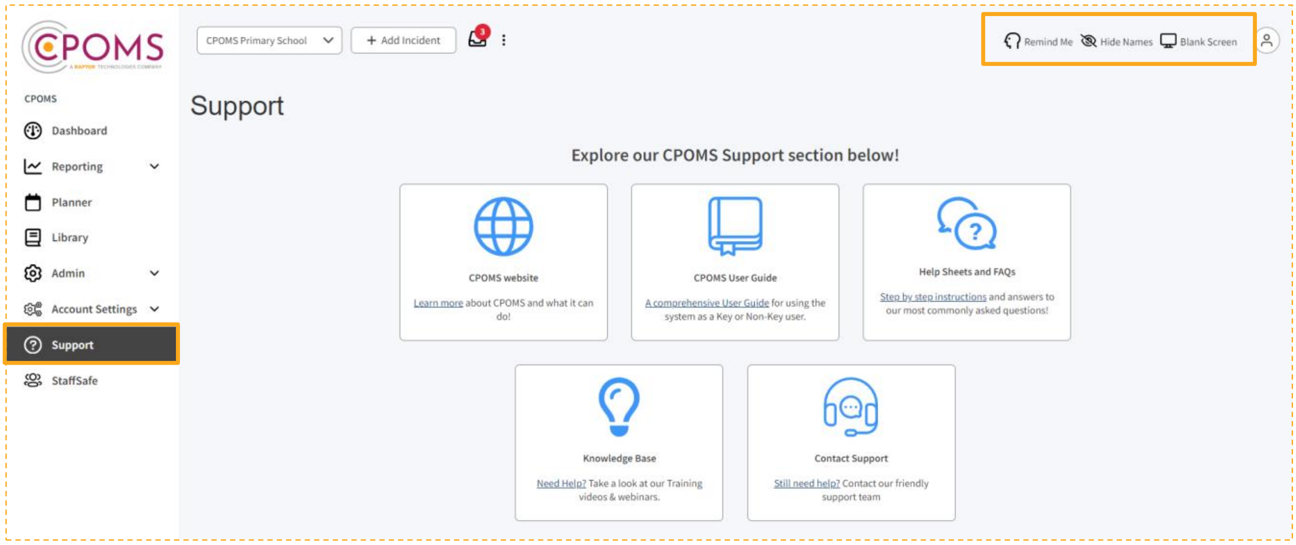
If you are in a higher level user group, your access will now change to reflect your user group permissions.

30 Extra Features

A few final features on CPOMS are the **Remind Me, Hide Names** and **Blank Screen** functions, plus our extensive **Support** section.

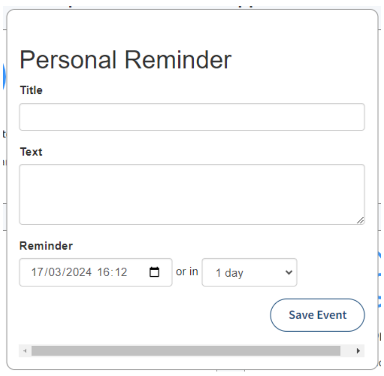
You will find all of our Support options in the left-hand navigation panel.

Remind Me, Hide Names and Blank Screen mode are available in the top-right corner throughout CPOMS.



30.1 Remind Me

The **Remind Me** function is linked to the Planner area, it quickly enables you to add any personal or CPOMS reminders. This can be useful when dealing with an incident that you need to follow up on at a later date. By adding a reminder you will receive a prompt on your dashboard and also a notification via email at a time of your choosing.



30.2 Hide Names

The **Hide Names** mode, available in the top right-hand corner of your screen, will star out the names of all students within the system – therefore if you produce a class list you will only see the first letter of each first name and surname. This follows suit throughout every page until you turn it off by re-clicking the button, which would now be called **Show Names**.

30.3 Blank Screen

The **Blank Screen** mode, available in the top right-hand corner of your screen, will quickly provide you with a cover to hide your screen; for example, if you are perhaps interrupted by someone who you do not want to see your screen when adding an incident or running a report, without having to lose where you are in the system.

The blank screen mode will automatically activate after fifteen minutes of inactivity. If you would like to adjust this time, you can do so in the 'Admin' area > 'System Settings' tab > 'Idle Timeout' section.

*N.B We do always recommend that you **log out** completely if you are leaving your computer for any time.*

30.4 Support

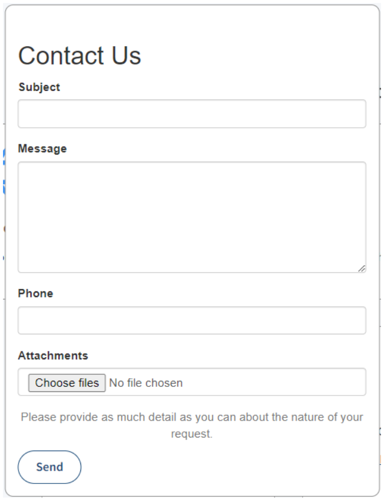
The **Support** section is available in the left-hand navigation panel.

Here you will find a comprehensive user guide, our step-by-step help sheets and FAQs, a knowledge base which includes training videos and upcoming webinars, as well as the Contact Support function should you need to contact us.

To raise a ticket with us, simply click on the 'Contact Support' button, enter your subject, message, phone number and submit. You may also attach any files to support your query here, i.e. a screenshot of an error message. This will then be sent directly to our CPOMS helpdesk where someone will carry out your request as soon as possible and notify you once it has been completed.

Contact Support is for any and all queries, however, if your request is **URGENT** please contact us by **telephone** on **01756 797766.**

N.B Please note, any official requests are required in writing, therefore if you contact us via telephone you will often be referred to the Contact Support function.



30.5 Import Health

There is also an **'Import health'** traffic light indicator on the dashboard which displays green, amber or red depending on when we last received an import. If you notice that there has been a change in health, it may require a reboot of the MIS imports. If your MIS import is not running successfully, your class and staff lists, as well as attendance figures will not be accurate.

Please feel free to contact us via the 'Contact Support' function if this occurs and we can provide you with the necessary instructions to restart the imports.

31 Non Key User - Restricted System Access

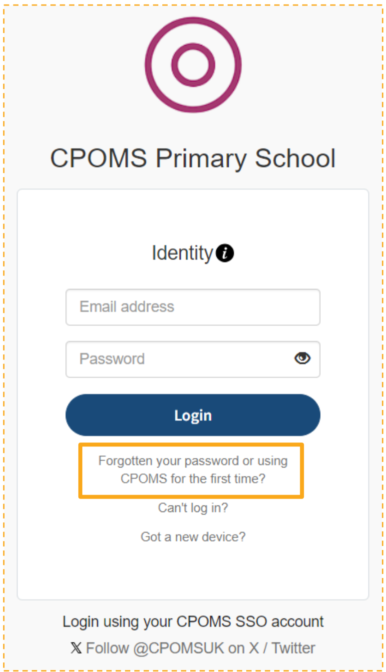
31.1 Using CPOMS for the first time

Firstly every user needs to set their own password.

To ensure that all users change their password to something that is personal and secure, we <u>do not</u> provide you with a password to begin with.

To create your first password please **visit your school's CPOMS URL.**

Click on the **'Forgotten your password or using CPOMS for the first time?'** option *(beneath the 'Login' button).*



When prompted, input the email address which was supplied to us and click **'Reset Password'.** This will then send you a unique hyperlink, to that email address, which will enable you to create your first CPOMS password.

*Please note, the reset password link **expires at midnight** on the day it was sent, so should be generated on the day you are going to log in to CPOMS.*

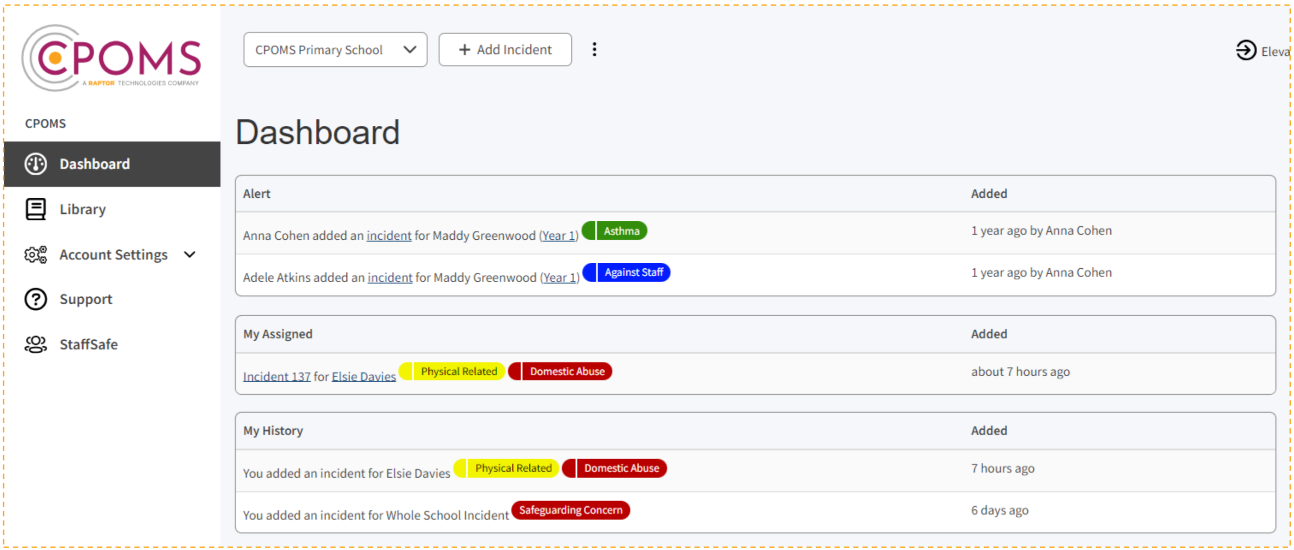
Once you have created your first password, go back to your CPOMS log in page and enter your email address, password and click the **'Login'** button.

31.2 Restricted Access Dashboard

Once you are logged in to CPOMS, you will see an **'Alert'** and **'My History'** section.

If you have been alerted to anything at all within CPOMS it will display within your **'Alert'** section to view.

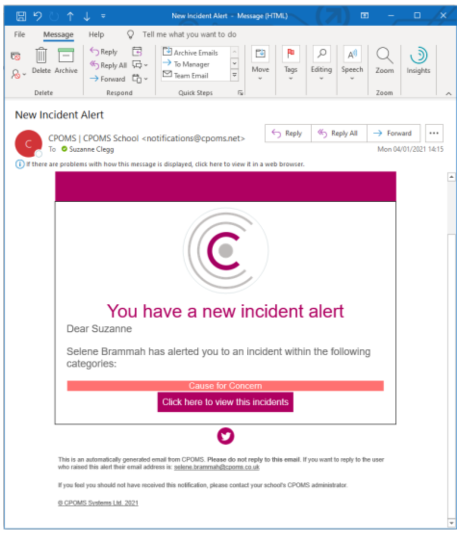
The **'My History'** section will list any incidents or actions that you have added in the last 7 days, for your information.



32 Viewing an Incident

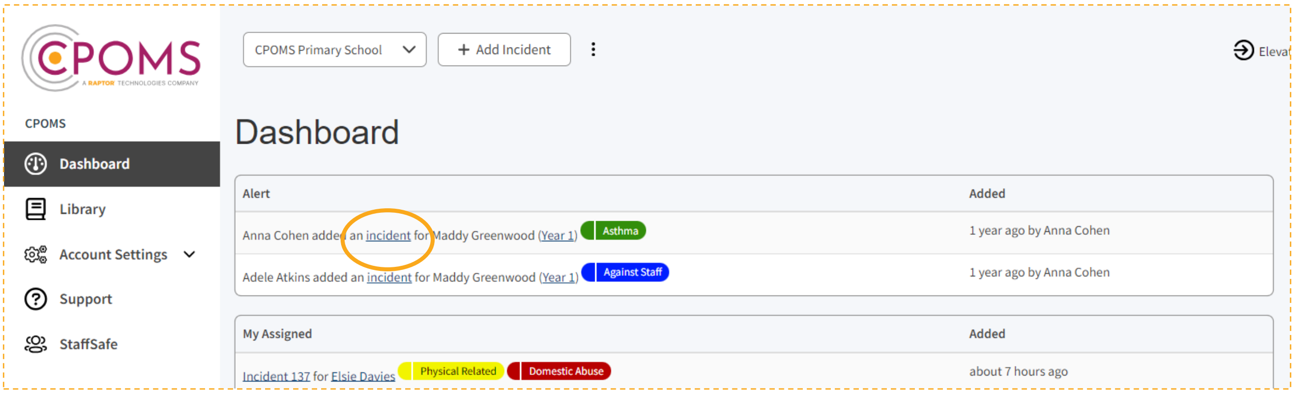
If you have been sent any alerts at all, you will also receive an email to your school email address *(or the one which we have been given)* to make you aware of the fact that you have been sent an alert by a member of staff in school.

The email will tell you who has created the alert and which category it falls under but <u>no other information</u>. It will then give you a link to your CPOMS log in page to view the content in full.



Once logged into the dashboard you will see your list of alerts. It will again tell you which member of staff has alerted you, which student the alert is about, the category(s) the incident falls under and when the incident alert was created.

If you now click on the word '**<u>Incident'</u>** you will be taken directly to view the incident.



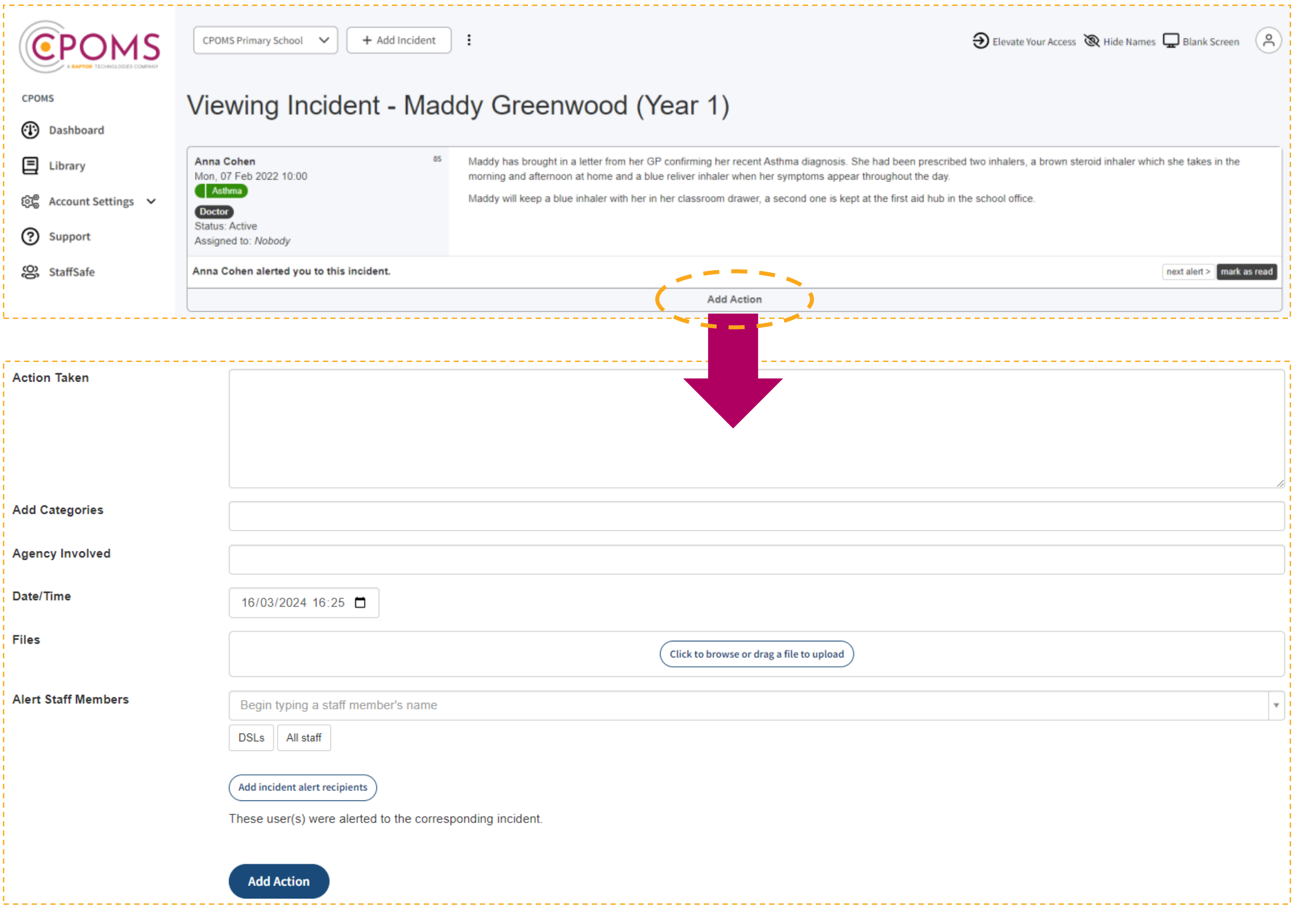
Once you have read and dealt with the incident, you can choose to **'Add Action'** below the content, to add in the detail of any action you have taken, or what you would now like a colleague to follow up.

Once you have added your action you may mark the incident as read to acknowledge that you have seen the incident and understand the content.

N.B Please note as you do not have key access, once you have marked the incident as read, the alert will disappear from your alerts dashboard and you will not be able to read it again. Therefore if you are required to add any further actions make sure to do this before you select the 'mark as read'.

33 Adding an Action

Once you have read an alert, you can then log an action. This is very similar to incident logging and you can choose to alert other staff in the same manner. You can then make sure that there is a clear trail of what has been done, by whom and when. This ensures that everyone alerted has an up-to-date knowledge of what is happening with that student/ incident.



Action Taken

Firstly fill in the free text box with all of the information needed about the action taken. This could be a referral made, telephone call or meeting arranged, for example.

Add Categories

If required, you can add additional categories to the action which will be displayed against the original incident.

Add action to linked students

If you would like the action to be copied to the linked students profile, click on the tick box to 'Add action to linked students' next and 'Share documents?' if necessary.

Agency Involved

You can also add any agency names to the action to make others aware of which agencies are involved with this action/ pupil.

Date/ Time

Select the date and time you wish to record, if it is different to the current.

Files

If you would like to attach a file/ document to support the incident *e.g. a social services letter, email, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add or drag a file from one of your folders into the area to upload.

Alert Staff Members

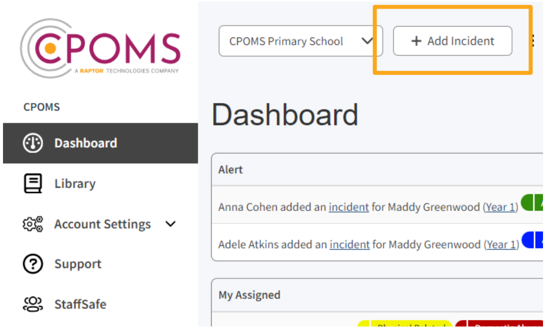
Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

Or you may click **'Add incident alert recipients'** to alert the same staff members who were alerted to the original incident.

Once all of the above has been done, you must select the **'Add Action'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added action.

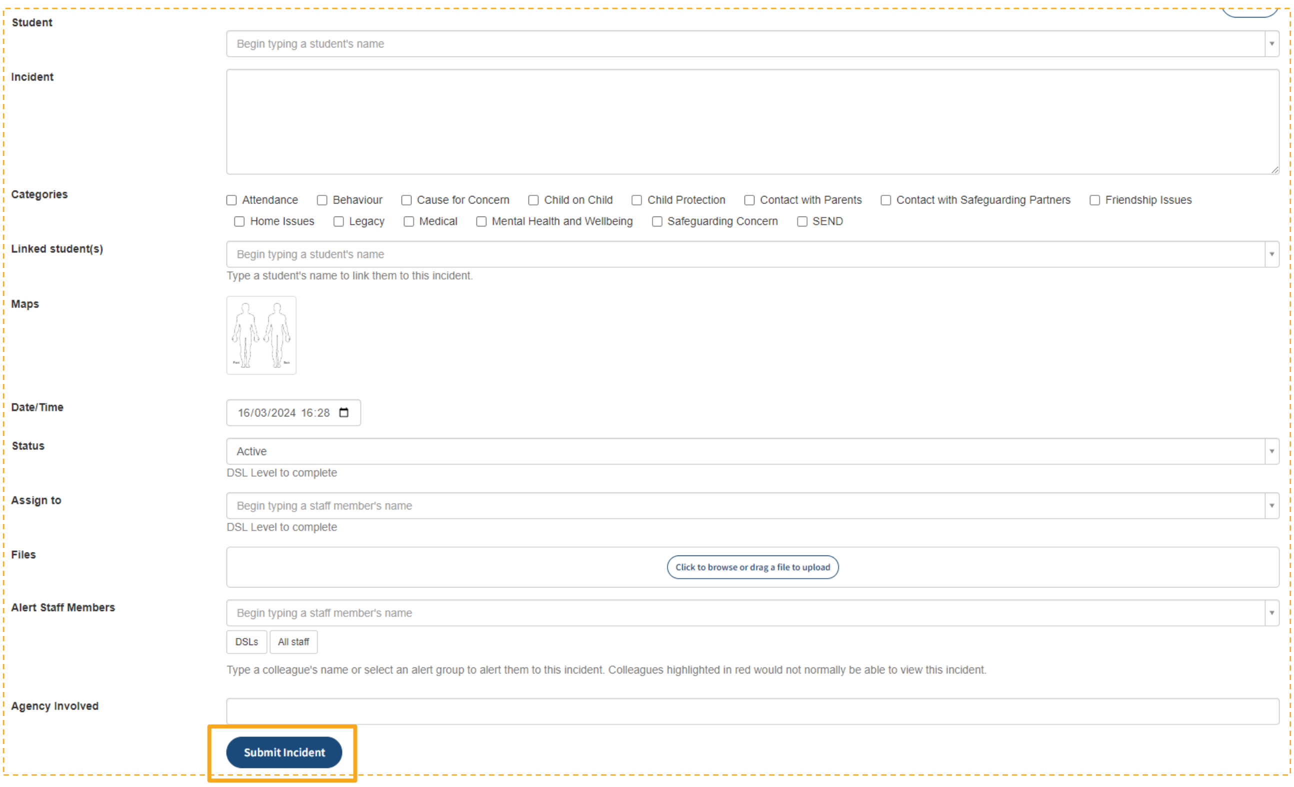
34 Adding an Incident

To add a new incident to the system click on the **'Add Incident'** button, available to the top left of your dashboard.



You will then be taken to the 'Add Incident' form, where you can fill in all of the details about the incident.

Add Incident Form (Non-Key Holder)



Student

Begin to type in part of the name of the student that you would like to add an incident about. This will begin to filter through all of the student names held within the system. Once their name appears for selection, please click on it. *If you select the wrong name click on the 'x' delete button to choose an alternative student.*

Incident

Fill in the 'Incident' text box with all of the details about the incident which you are adding. This is a free text box so you can add as much or as little as needed. Be careful to be **accurate** and **specific.**

When inputting any linked student names into the incident text box, please ensure that you spell their name ***identically*** *to how it is spelt within your MIS. This ensures that if the school needs to use the 'Hide Names' feature when reporting in the future, their name will be detected and blanked out.*

If a student mentioned in the incident text will ***not*** *be linked into the incident their name will not automatically be picked up by the 'Hide Names' feature should the school need to use it.*

If recommended by your LA/Safeguarding Advisor ***or*** *if you have a 'People Involved' custom field setup, you may use their initials instead or terms such as mum/ dad/ brother/ sister within the incident text.*

Categories

Once you have filled in all of the details about the incident, you need to select at least one category to assign it to. If there is an overlap you may select more than one.

Linked student(s)

You can then choose to link in other students if more than one is involved in a particular incident. This will copy the incident to all pupils selected. You can also click to monitor the linked student under the same category(s) if necessary and choose whether to share any documents you attach to the incident to their profile(s) as well.

Maps

The 'Maps' feature allows you to apply numbered markers to a map image to support your incident text. This will default to our 'Body Map'.

Date/Time

Following this you can select a date and time. These will both default to the current date and time, however if you wish to change it to when the incident actually occurred you can do so here.

Status

You may set the 'Status' of the incident to 'Active' or 'Closed'.

Assign to

You may also assign an incident to a specific staff member *(Key Holders Only)* if they will be dealing with it, by selecting their name in the 'Assign to' field. *The chosen user will then receive an email notification to alert them to this and the incident will appear in the 'My Assigned' area of their dashboard until the incident status changes to 'Closed'*

Files

If you would like to attach a file/ document to support the incident *e.g. a social services letter, previous school case notes, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add or drag a file from one of your folders into the area to upload.

Alert Staff Members

Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

Agency Involved

You can also add any agency names to the incident to make others aware of which agencies are involved with this incident/ pupil.

Once all of the above has been done, you must select the **'Add Incident'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added incident.

35 Extra Features

A few final features on CPOMS are the **Hide Names** and **Blank Screen** functions, plus our extensive **Support** section.

You will find all of our Support options in the left-hand navigation panel.

Hide Names and Blank Screen mode are available in the top-right corner throughout CPOMS.

35.1 Hide Names

The **Hide Names** mode, available in the top right-hand corner of your screen, will star out the names of all students within the system. This follows suit throughout every page until you turn it off by re-clicking the button, which would now be called **Show Names**.

35.2 Blank Screen

The **Blank Screen** mode, available in the top right-hand corner of your screen, will quickly provide you with a cover to hide your screen; for example, if you are perhaps interrupted by someone who you do not want to see your screen when adding a new incident, without having to lose where you are in the system.

The blank screen mode will automatically activate after fifteen minutes of inactivity.

N.B We do always recommend that you log out completely if you are leaving your computer for any time.

35.3 Contact Support

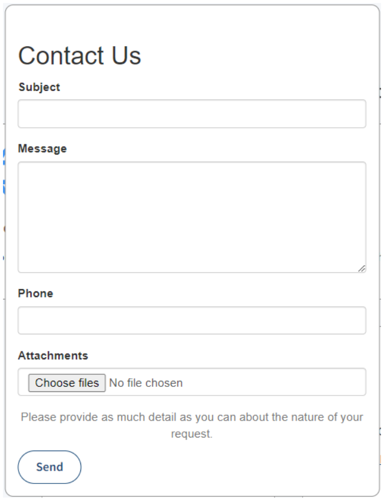
The **Support** section is available in the left-hand navigation panel.

Here you will find a comprehensive user guide, our step-by-step help sheets and FAQs, a knowledge base which includes training videos and upcoming webinars, as well as the Contact Support function should you need to contact us.

To raise a ticket with us, simply click on the 'Contact Support' button, enter your subject, message, phone number and submit. You may also attach any files to support your query here, i.e. a screenshot of an error message. This will then be sent directly to our CPOMS helpdesk where someone will carry out your request as soon as possible and notify you once it has been completed.

Contact Support is for any and all queries, however, if your request is **URGENT** please contact us by **telephone** on **01756 797766.**

N.B Please note, any official requests are required in writing, therefore if you contact us via telephone you will often be referred to the Contact Support function.



36 Frequently Asked Questions

How do I reset my, or another users, CPOMS password?

Please select the **'Forgotten your password or using CPOMS for the first time?'** option, beneath the 'Login' button at your usual CPOMS log-in page.

Simply input the email address which was supplied to us (this can be your own, **or another users**) and click 'Reset Password'.

This will then send you/ the user a unique link to the email address provided, where you/ they can create a new CPOMS password.

When I try to reset my password I receive the error 'The email address you entered does not exist'?

Please firstly check that you are on the **correct URL** (web address) for your schools CPOMS log-in page, and that the email address you are inputting **does not contain any spelling mistakes or typos.**

This error can occur if you have not been added to CPOMS. Please contact your CPOMS Administrator to check and arrange this, via the CPOMS 'Admin' area > 'Users' tab by clicking on your name, into your profile page.

This error can occur if we have a different email address assigned to your account, or if there is a spelling error in it. Please contact your CPOMS Administrator to check and amend this, again via the CPOMS 'Admin' area > 'Users' tab.

Also, if your school has a mixture of **'Identity'** and **'SSO'** (Single Sign On) users, please ensure you are selecting the correct **'Authentication Provider'** for your account type when trying to reset your password:-

- If you have access to **one school/ CPOMS system** please choose **'CPOMS Identity'**.
- If you have access to **more than one CPOMS system (including CPOMS StaffSafe)** please choose **'CPOMS SSO'** - if SSO has been setup for your account.

What's the difference between the Soft Key and the Physical U2F USB key?

The CPOMS Authenticator app (Soft Key) works in much the same way as the latest revisions of Internet Banking in that it generates an ever changing 6-digit security code (to use alongside your email and password) to enable higher level access in CPOMS. The app must be downloaded to an iOS or Android tablet / smartphone device but can be used to log in to CPOMS on all devices, including your laptop/ PC, by inputting the number displayed on the app when prompted.

The USB key works in much the same way as the soft key, but as a physical USB device - so rather than inputting the 6-digit code provided in the app, you would plug the USB key into your PC and press the button on the key itself which will generate a unique code.

How can I set up the CPOMS Authenticator app (Soft Key)?

Please click here for instructions.

How can I set up my USB/ U2F Key?

Please click here for instructions.

Soft Key Error - 'Incorrect or out of date code'

If you receive an error message which says 'Incorrect or out of date code', when logging in to CPOMS with your key, it means the date and time on the device of your app is out of sync with our servers (it may be slightly fast or slow).

Usually the way to fix this is to amend the date and time setting on the device of your app to 'set automatically'.

Please ensure the time zone is set to 'London GMT', which ensures the date and time is set identically to our servers.

USB Key Error - 'Unable to verify your U2F key'

This error usually occurs for one of the following reasons:-

- You are using the incorrect U2F key – keys are assigned to an individual user, please ensure that you have the correct key
- You are on the incorrect CPOMS url – each CPOMS url is unique to the individual school, please ensure that you are on the correct url for your school
- You do not have a key assigned, as keys are assigned to a specific user, they must be re-programmed to work for a new user
- Please also ensure the CAPS Lock option is switched off.

How do I monitor a student in CPOMS?

A student will automatically become monitored as new incidents are added by staff. You can also choose to monitor a student manually within their 'Overview' tab, by selecting the 'Edit Information' button (to the right-hand corner). From here you can simply tick the relevant category name(s) and scroll down to 'Update Student' to save.

How do I un-monitor a student

To un-monitor a student for a certain category, access their profile, *via the class list or the quick student search*, on their 'Overview' page, click on the **'Edit Information'** button. Scroll down the page to the 'Monitoring Options' area and simply un-tick the category(s) you would like to un-monitor them for, and 'Update Student'.

How do I monitor/ un-monitor in bulk for a certain category

To monitor or un-monitor a group of students for a certain category, from the main dashboard you can either click on your different category names (to the right-hand side, to see who is monitored for what), or you may click into a class list (i.e. a whole tutor group or year group). Next, to the right-hand side of the screen (above the student names) you can select to **'Update Categories'**. Once selected, a tick box will appear to the left of each student's name, tick the relevant students that you wish to monitor/ un-monitor and 'Continue'. You can then choose a category name and choose to either 'Add' or 'Remove' it from the selected students, as well as choose a start date, or if needed you may wipe all categories.

This is important to ensure your monitored student figures are accurate and up to date.

How do I run a full student report/ chronology?

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. You may also wish to choose to **Hide Student and/ or Staff Names** in the report.*

- For all records please ignore the further filter options, or you may apply specific dates or select certain categories here.
- 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.

You can run all reports within CPOMS in 'Enquiry View' to view the report on screen, or 'PDF (Print View)' to create a printable PDF copy.

Useful Reports Guide

Please click here to view the useful reports section.

How do I add our school logo to reports?

To add your school logo to appear in the header of PDF reports, firstly upload the school logo into your CPOMS 'Library' area, in your preferred size.

Next, navigate to your CPOMS 'Admin' area, selecting the 'Settings' tab. Scroll down to 'School Logo', select the relevant logo here and click 'Update Settings'.

How do I access an archived student's profile/ incidents?

Once a student is marked as archived in your MIS, they will automatically become archived in CPOMS on the next import.

You can still always access and add to the students profile as normal. You just need to tick the 'Include archived students' check box, beneath the 'Quick Student Search' box, when searching.

If you are unable to view archived students, you will also need to make sure you have access to un-grouped students. You can check this within the 'Admin' area > 'Users' tab, click into your name and to the left 'Permissions'. Within permissions, simply select the tick box here:- 'Can view students who don't have a group (typically archived)' and 'Save'.

Can I edit/ remove an incident or action?

Admin key holders can choose to edit and remove both incidents and actions within CPOMS.

The 'Edit' and 'Delete' functions are available within each child's profile > 'Incidents' tab, in the top right-hand corner of each individual incident/ action, under 'Options'.

For more information about this click here.

How do I remove a document/ file?

Admin key holders can remove incorrect or unwanted files within CPOMS; via the students document vault, or if added to an incident or action simply locate the incident within the child's incidents tab, and in the right-hand corner of the specific incident/ action under 'Options' click 'Edit' – you can then remove the attached file(s), and save.

Can we re-use/ re-program U2F/ USB keys?

If the small key code on the back of the key begins with 55 or higher, or starts with a 7, it can be reprogrammed in school, please see the below instructions. Older keys which do not start with these numbers can no longer be reprogrammed I'm afraid, as the technology used is no longer supported.

To reprogram a U2F/ USB key in school, you must firstly remove the U2F/ USB key from its previous owner.

A CPOMS Admin Key Holder in school can remove the key, within the 'Admin' area > 'Users' tab, by clicking on the previous key holder's name and within their profile, to the left 'Security Keys'.

Once the key has been removed, it must be linked to the new key holder's account by following the U2F Key Setup Instructions in their own CPOMS login.

How do I order a new U2F/ USB key?

To order a new U2F/ USB Key please **download the below order form** from our website and **return via email to** ps@cpoms.co.uk.

New Key Order Form (U2F/ USB)

Additional USB keys are currently £31.00 + VAT (as of 02/10/2023).

We are missing a student/class?

If you notice that you are missing students, or your classes do not appear to be up to date this is often a sign that your import is no longer running successfully.

You can check the status of your import via the 'import health' traffic light indicator on your schools dashboard, or within the 'Admin' area > 'Imports' tab.

Please feel free to contact us via 'Contact Support' if this occurs and we can provide you with the necessary instructions to restart your imports.

My import status is 'failing'?

If your 'import health' traffic light indicator changes to 'failing' this means your import link has been broken.

Please feel free to contact us via 'Contact Support' if this occurs and we can provide you with the necessary instructions to restart your imports.

I cannot see a students transfer information?

Once the transfer status changes to 'Transferred', the new school will receive the student's full transfer information.

The schools/ students' previous incident categories are brought across to CPOMS also, under a main category of 'Legacy', with sub-categories of the previous school's category names.

The Legacy categories are automatically deactivated, and the permissions are set to blank, to ensure that no new incidents can be logged against them and that only the correct level of staff at the new school can access the transferred information.

Therefore in order to gain access to the transferred information, an Admin key user needs to set the permissions for each Legacy category, and any sub-categories within the **'Admin'** area > **'Users'** tab, by clicking into the top level User Group name, i.e. SLT, to the right-hand side of this page.

Within the User Group **'Category Permissions'** please tick 'View Students' and 'View Incidents' against each Legacy category, and any sub-categories, ensuring you 'Save Group' once ticked.

Please leave the 'Add Incidents' column un-ticked, and all of the Legacy categories de-activated so that no new incidents can be logged against them.

Once the category permissions have been switched on, the transferred information will appear within the students profile > **'Incidents'** tab in date order, and any files within their **'Document Vault'** tab.

For full information regarding CPOMS transfers, please click here.

Member of staff not appearing in 'Add user' drop down list?

To appear in the 'New User' drop down list, staff must be added to your MIS, as a permanent staff member, with a current start date and full-time employment. Your imports must also be up and running successfully to be kept up to date.

If you have de-activated this user at some point, an Admin key user can re-activate them within the 'Admin' area > 'Users' tab, by selecting the 'Deactivated User' button in the right-hand corner.

Or, if you would like to add a member of staff who is not in your MIS system for any reason, choose the 'Add Non-MIS User'.

Clear Dashboard Alerts

A CPOMS **Admin Key Holder** can clear dashboard alerts in full by navigating to 'Admin' > 'Users' and clicking on the relevant user's name from the list of users. In the user's profile, click on 'Alerts' to the left. Next to **'Clear user's dashboard alerts'** enter the dates you would like to remove the alerts between and click the 'Remove dashboard alerts' button.

Please note, this will remove all of the user's dashboard alerts within the input timeframe so should only be selected if you are happy that they have been dealt with.

Bulk closing incidents

An Admin Key Holder can bulk close incidents via the 'Admin' area > 'Bulk Management' tab. Simply enter the time frame you wish to close incidents between and click 'Update Status To Closed' when you are ready. *Please be aware this action is irreversible.*

37 CPOMS Support

Should you require any support at all for CPOMS our contact details are as follows:-

CPOMS Systems Limited
Unit 7
Acorn Business Park
Skipton
North Yorkshire
BD23 2UE

Telephone:- 01756 797766

e-Mail:- support@cpoms.co.uk

X/ Twitter | Facebook | Instagram | LinkedIn

There is also a built in **'Contact Support'** function, within the **Support** section (located in the left-hand navigation panel), which links directly to our helpdesk.

☎ The office is open Monday to Thursday 8:30am to 5:30pm, and Friday 8:30am to 5pm.

If your request is URGENT please always contact us by telephone.