

Multiple Student Report and Document Download

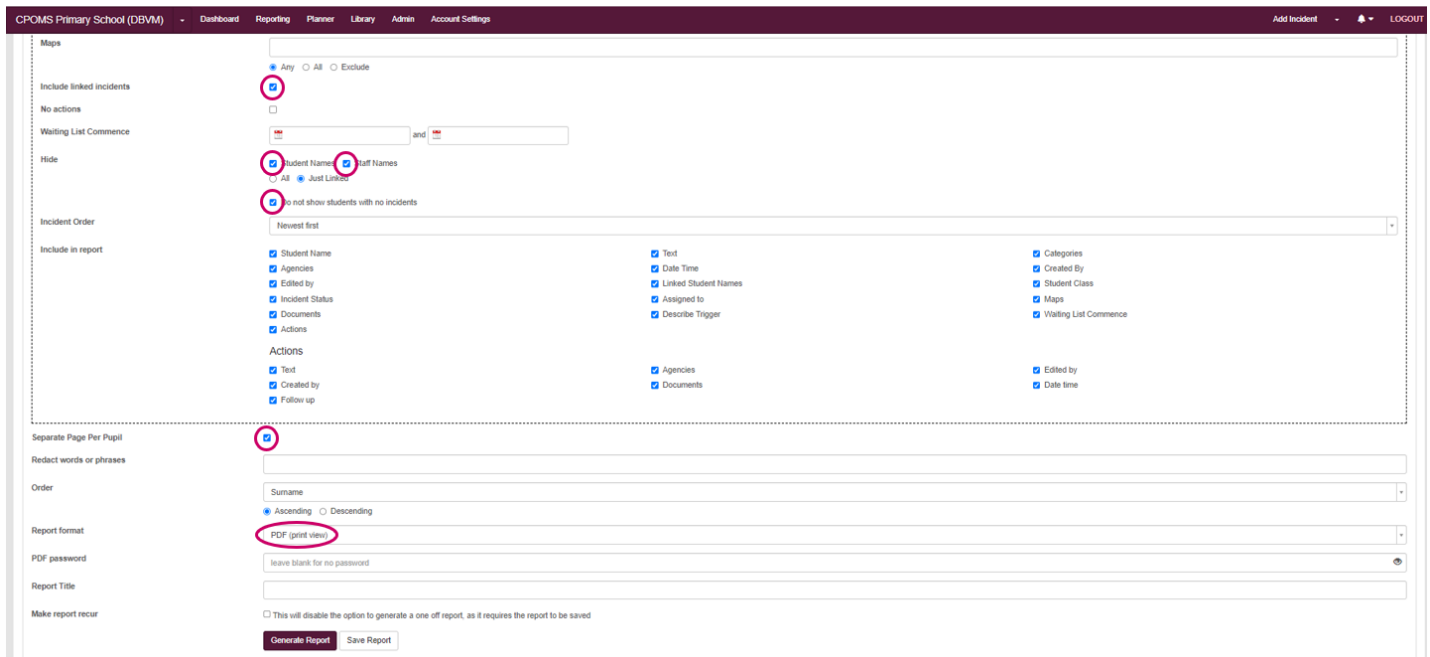
How do I run a report for all students moving to a school who don't use CPOMS?

To run a report on multiple students, please navigate to the Reporting tab, and select 'Custom Report'.

- C Ensure 'Report on' remains on 'Students', and then select the 'filter students' option. Within this dropdown, you can choose to report on a specific class / year groups within the 'Groups' field, or if the students have already been archived, select 'only' and choose the relevant date.
- C Within the 'Include in report' section, please select the 'Incidents' box – you can leave all other tick boxes selected, and select any further tick boxes if required.
- C *If you need to include everything for this group of students, ensure that you select 'include linked incidents'.*
- C *Hide: 'Student names' and Staff names', and then select 'Just linked'.*
- C *Do not show students with no incidents: tick this if required.*
- C Scroll down to the '**Report format**' and amend this to '**PDF (print view)**'.
- C Scroll back up slightly, and select 'Separate page per pupil' (this option only appears once the PDF format has been selected below.
- C If required enter a '**PDF password**' to password protect the report, and '**Generate Report**'.

This will then generate a PDF copy 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.



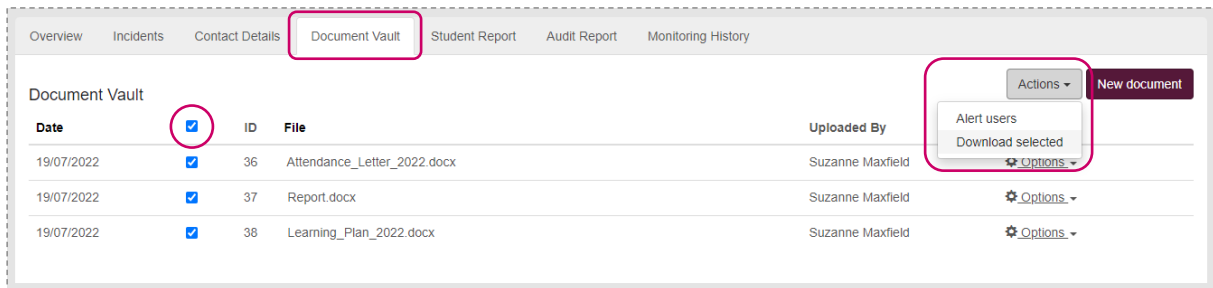
The screenshot shows the CPOMS Reporting interface for 'CPOMS Primary School (DBVM)'. The 'Reporting' tab is active. The 'Include linked incidents' section has the 'Include linked incidents' checkbox checked. The 'Waiting List Commencement' section has a date range field. The 'Hide' section has 'Student Names' and 'Staff Names' checked, and 'Just linked' selected. The 'Incident Order' section has 'Newest first' selected. The 'Include in report' section has several checkboxes checked, including 'Student Name', 'Agencies', 'Edited by', 'Incident Status', 'Documents', 'Actions', 'Text', 'Date Time', 'Linked Student Names', 'Assigned to', 'Describe Trigger', 'Categories', 'Created By', 'Student Class', 'Maps', and 'Waiting List Commencement'. The 'Separate Page Per Pupil' checkbox is checked. The 'Redact words or phrases' section has a text input field. The 'Order' section has 'Surname' selected. The 'Report format' dropdown is set to 'PDF print view'. The 'PDF password' section has a text input field with the placeholder 'leave blank for no password'. The 'Report Title' section has a text input field. At the bottom, there is a 'Generate Report' button and a 'Save Report' button.

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

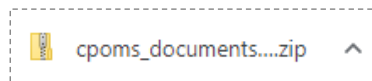
Once you have run the report, you may wish to download all student's documents/ files as well.

To do this, you will need to access each individual 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.

For further assistance on any of the above please do not hesitate to contact us on

01756 797766 or support@cpoms.co.uk.