

Cases Module

The 'Cases' module in CPOMS allows the school to assign incidents to a specific user, and mark incidents as 'Active' or 'Closed'.

A 'My assigned' section appears on each Key Users Dashboard, advising the user of any active incidents assigned to them. Once an incident is marked as 'Closed' it will no longer appear in this area.

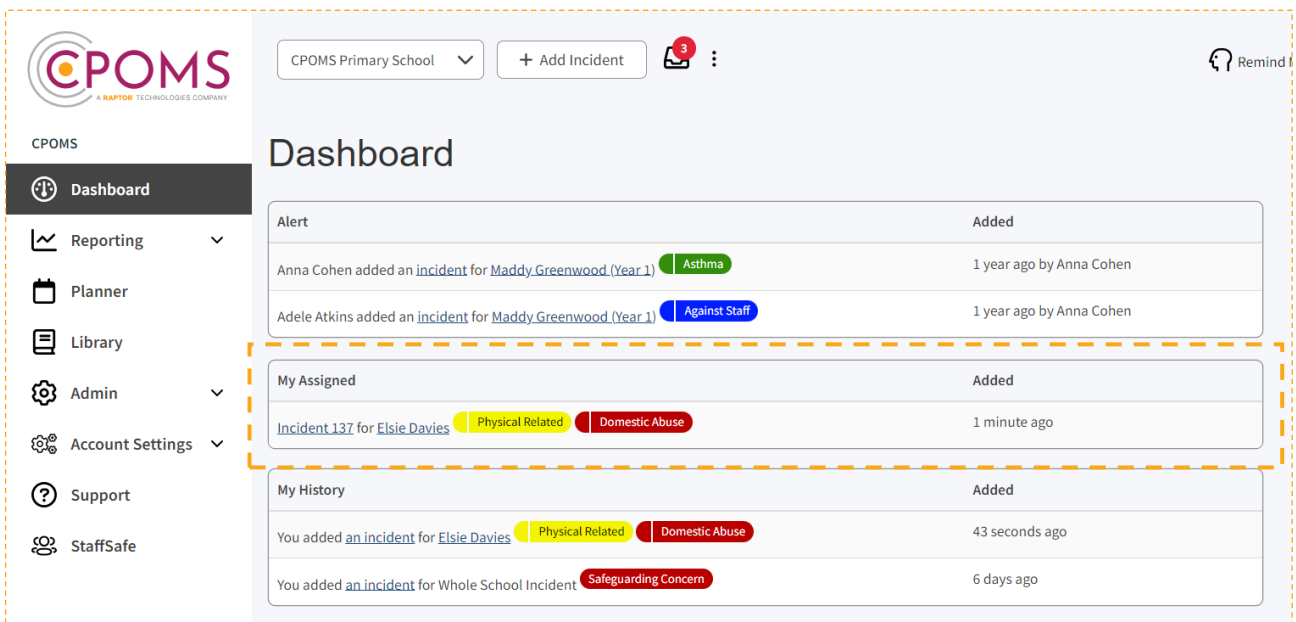
When a Key User is assigned a new incident, they will receive an email alert notification to inform them of this.

The 'Assigned to' and 'Status' fields also appear within the reporting 'Filter Incidents' options, so you are able to report on 'Active' incidents only, those 'Assigned to' a particular user, or those that are unassigned, for example

This module can be switched off on request.

Dashboard: My Assigned

A 'My Assigned' section will appear on each Key Users Dashboard so they can quickly see any active incidents assigned to themselves.

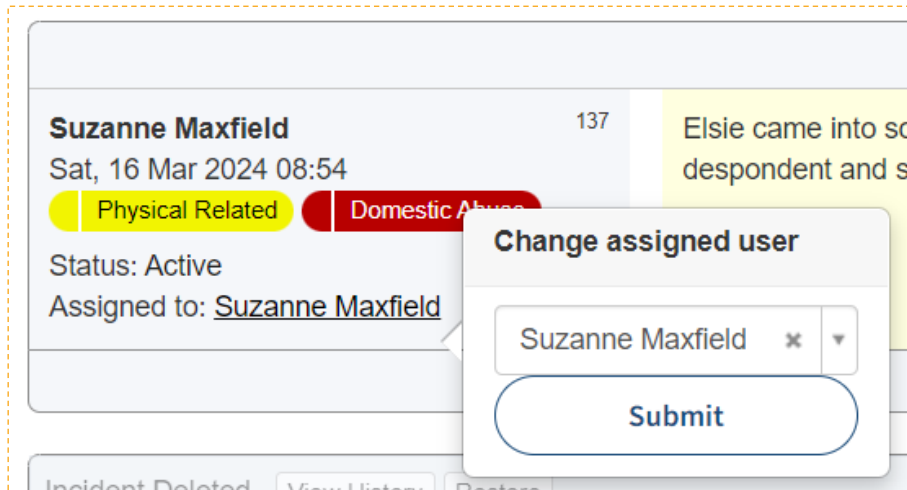


If you click on the incident number hyperlink, it will take you directly to the incident to review.

How to assign an incident to a user

To the left of incident text, you will see two options for **'Status'** and **'Assigned to'**. To assign the incident to a user, click on Assigned to: 'Nobody' and choose who you would like to assign the incident to and submit. *(please note, incidents can be assigned to Key Users only)*

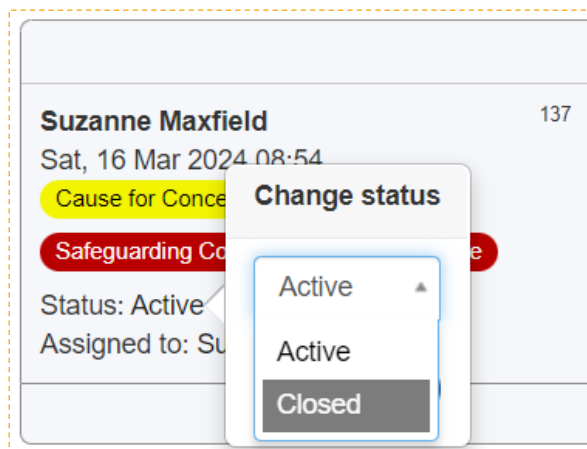
The option to assign will also appear on the initial 'Add incident' form for Key Users to choose from when adding a brand new incident.



How to mark an incident as 'Active' or 'Closed'

To the left of the incident text, Key Users will see two options for **'Status'** and **'Assigned to'**. To amend the status, click on Status: 'Active', change to 'Closed' and submit. Once the incident status is 'Closed' it will no longer be listed on your 'My Assigned' area.

The option to set a status will also appear on the initial 'Add incident' form for Key Users to choose from when adding a brand new incident.



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.*

Bulk Management

This area will allow you to bulk update the status of incidents to 'Closed' based on the date filters selected.

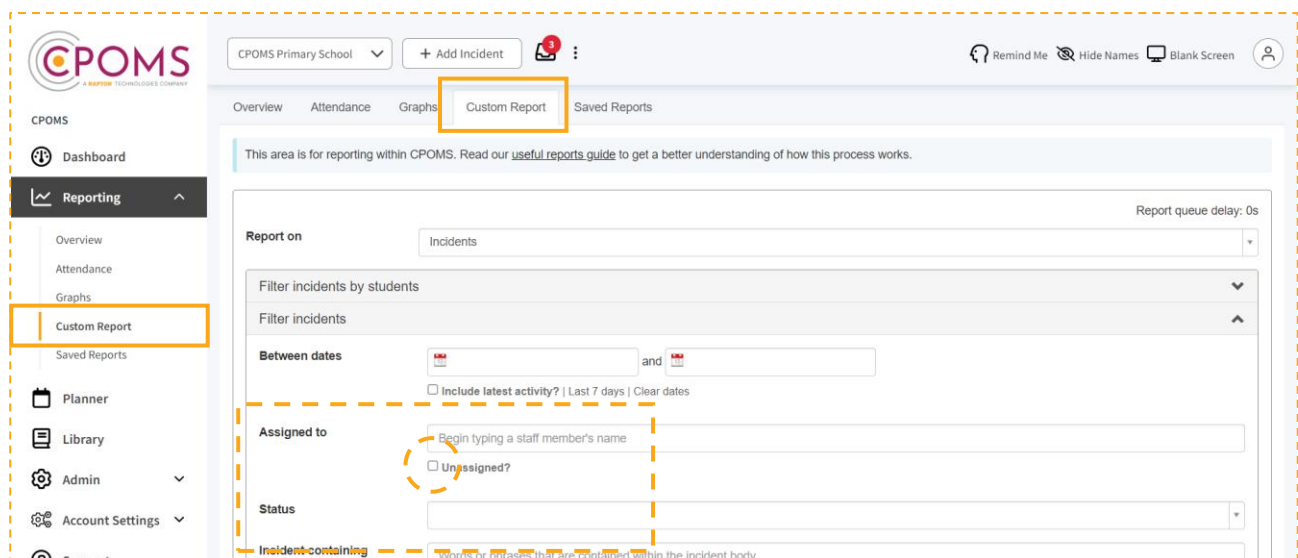
Incidents to be updated between: and

Update Status To Closed

How do I report on this?

To report on these options, go to 'Reporting' > 'Custom Report', and open up the **Filter Incident** options.

Here you will find the filters for 'Assigned to' and 'Status'. You may also look at incidents which are 'Unassigned' by selecting the tick box here.



The screenshot shows the CPOMS 'Custom Report' interface. The 'Reporting' menu is open, and 'Custom Report' is selected. The 'Filter incidents' section is expanded, showing filters for 'Assigned to' and 'Status'. The 'Assigned to' filter has a search box with the placeholder text 'Begin typing a staff member's name' and an 'Unassigned?' checkbox. The 'Status' filter is a dropdown menu. The 'Incident containing' filter is also visible at the bottom.

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

01756 797766 or support@cpoms.co.uk.