HELIX

Helix Golden Reports

CAPITAL CITY PARTNERSHIP

CITY REGION DEAL
Edinburgh & South East Scotland

Introduction

Helix now has a selection of Golden reports which are available to all users.

All the reports are under **Web Reports** in a folder called "golden reports" and all have a * at the start of their name to make them easily identifiable.

These reports will run in one of two ways:

Programme

- No pre-built criteria from other modules needed
- You can build a programme filter using the ***create*** button. This can be a selection of programmes. Often it might be best to run reports one programme at a time
- Select the name of the programme(s) you want to include and save the criteria
- This option will be available from the ***select*** button next time

Criteria

- Build your own criteria from different parts of the system – CLD, Enterprise, Vacancy – but the main focus here is the Client module
- Can be as simple as your own caseload name
- Can be very specific e.g. to look at activities linked to programmes in a target date range and include gender, age range etc.
- Save the criteria with a name to find in web reports module
- The same criteria can be used across different reports

Building a client criteria

Select the **Client Module**, then click on "**Reports and Multiple Actions**"
You will see various tabs where you can specify precisely what criteria you want for your report.

When you change your criteria you can immediately check how this has affected the number of client matches by clicking
When the result appears, click on 'View Matches' to review the list of matching clients.

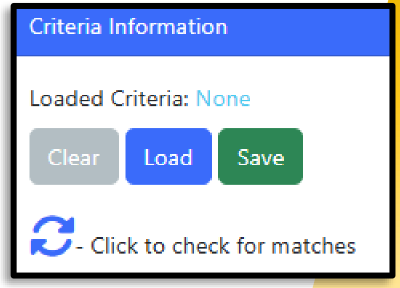
Criteria can be broad or really targeted:

Example 1 – Broad e.g. your caseload
Scroll down on the "general" tab to Caseload, add your name

Example 2 – Targeted e.g. your caseload, who have job outcomes, on a specific programme, and are currently under 25

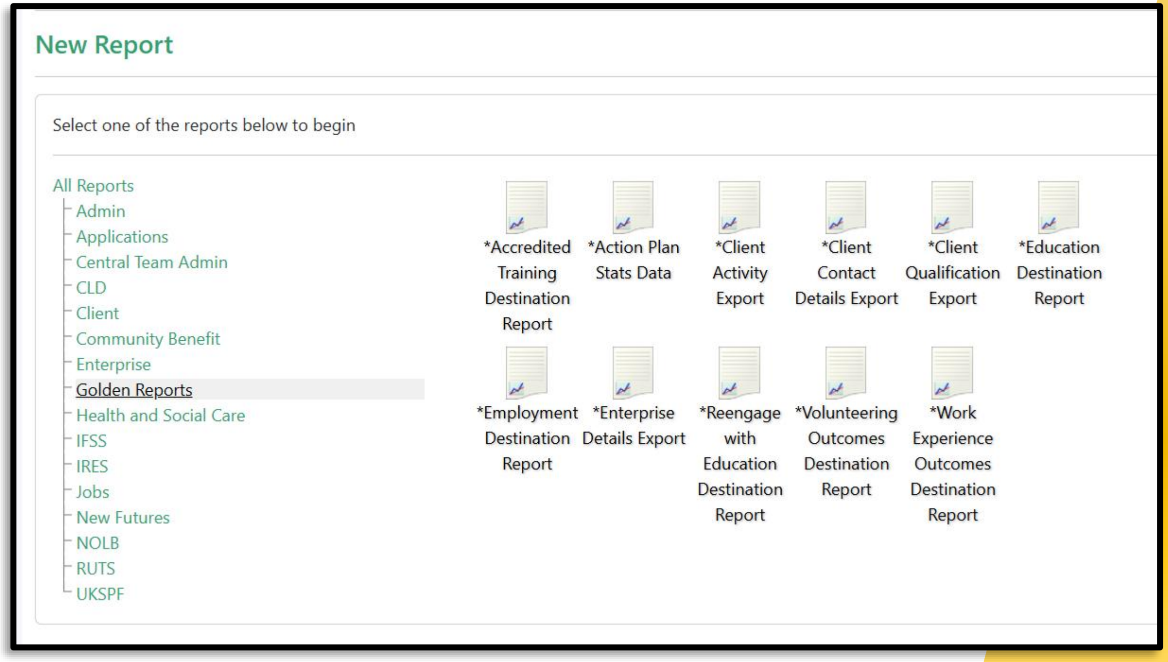
Scroll down on the "general" tab to Caseload, add your name
Go to "client" tab, under Age add 0 – 24, change the select to "at specified date" and add the date
Go to "activities" tab, add the "job start" activities you want to include
Scroll down to Associated Programmes add the programme

Save your criteria – this is what you will use in the web reports module.
Next time you open "**Reports and Multiple Actions**" you can click "load" under "criteria information" and bring the saved search back.



Golden reports available

- Accredited Training Destination Form
- Action Plan Stats Data
- Client Activity Export
- Client Contact Details Export
- Client Qualification Export
- Education Destination Report
- Employment Destination Report
- Enterprise Details Export
- Re-engage With Education Destination Form
- Volunteering Outcomes Destination Form
- Work Experience Outcomes Destination Report



Accredited Training Destination Form

This report gives client activity information and detail from the **destination form** added to **training activities** as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding the
“Started Employability Training”,
“Progression: Vocational Training” or
“Started Vocational Training” activities.

You can choose to include a date range for those activities.

The report will give one row for each activity.

The number of clients in the criteria builder will be reflected in the export report, which means clients included in any criteria who **do not have this activity** will also show in the report.

Action Plan Stats Data

Runs from a **client criteria**

This report gives a report showing action plan information. There is one row per action plan. Clients with multiple action plans appear on duplicate rows.

The number of clients in the criteria builder matches the export. If a client is included in the criteria but doesn’t have an action plan, it will show as a row but no action plan information will populate.

The report gives basic client detail, then the name of Action Plan, date created, status, caseload, milestones, date agreed and date achieved.

Client Activity Export

Runs from a **client criteria**

Gives a report with one row per activity.

All clients in the criteria will be included in the report.

Each activity is included, with date, programme, status, verification and caseload.

It includes some basic client information – gender, age, ethnicity, Post Code and SIMD bracket.

Client Contact Details Export

Runs from a **client criteria**

This report gives client contact information, permission to contact, gender and ethnicity.

Each client is on a single line. The number of clients in the criteria builder is replicated in the export report.

Client Qualification Export

This report gives client activity information and detail from the **destination form** added to **qualification activities** as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with including your qualification gained activity as part of the criteria.

You can choose to include a date range for those activities.

The report will give one row for each activity.

The number of clients in the criteria builder will be reflected in the export report, which means clients included in any criteria who **do not have this activity** will also show in the report.

Education Destination Report

This report gives client activity information and detail from the **destination form** added to **education activities** as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding the education outcomes activities and date range to the criteria ensure correct return.

The report will give one row for each education outcome activity. Clients included in any criteria who **do not have this activity** will also show in the report. The number of clients in the criteria builder will be reflected in the export report.

Employment Destination Report

This report gives client activity information and detail from the **destination form** added to **employment activities** as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding job start activities and date range to the criteria ensure correct return.

The report will give one row per job start activity. Clients included in any criteria who **do not have a job start** will also show in the report.

This report will also show if the outcome has the sustainment cycle correctly linked to the activity.

Enterprise Details Export

Runs from an **enterprise criteria**

The enterprise criteria works just like the client. You can select different criteria, with different levels of complexity.

Generates a report with one row per enterprise record.

Includes information about the sector, address, contact details and caseload.

Re-Engage with Education Destination Form

This report gives client activity information and detail from the **destination form** added to **re-engage with education** activity as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding “re-engage with education” activity and date range to the criteria ensure correct return.

The report will give one row “re-engage with education” activity. Clients included in any criteria who **do not have** a re-engage with education activity will also show in the report.

In addition, this report will also show the client age at the date of the activity.

Volunteering Outcomes Destination Form

This report gives client activity information and detail from the **destination form** added to **volunteering** activity as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding “started volunteering” activity and date range to the criteria ensure correct return.

The report will give one row “started volunteering” activity. Clients included in any criteria who **do not have this activity** will also show in the report. The number of clients in the criteria builder will be reflected in the export report.

Work Experience Outcomes Destination Report

This report gives client activity information and detail from the **destination form** added to **work experience** activity as part of No One Left Behind Reporting.

Runs from a **client criteria**

Best use is with adding "Started Work Placement/Experience" activity and date range to the criteria ensure correct return.

The report will give one row "Started Work Placement/Experience" activity. Clients included in any criteria who **do not have this activity** will also show in the report. The number of clients in the criteria builder will be reflected in the export report.

Helix support

There is a dedicate page for Helix user information.

You can find:

- Upcoming training
- Downloadable Helix guides
- Recorded videos showing key elements of the system

helix.scot/helix-training