



EARLY YEARS PASTORAL NOTES

ADMIN USER GUIDE

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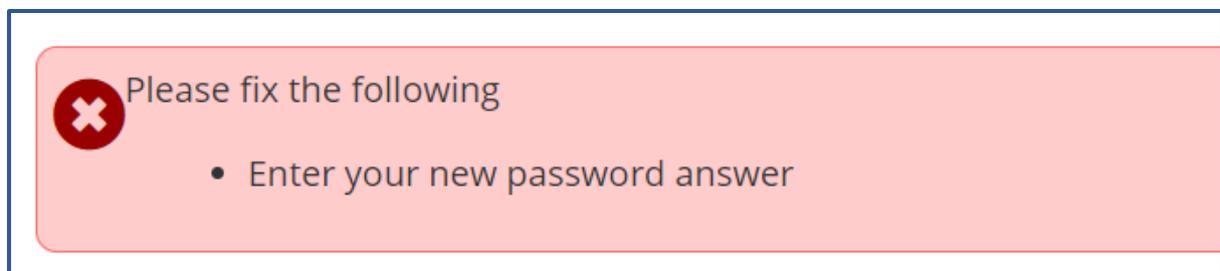
ACCESSING PASTORAL NOTES FOR EARLY YEARS

The Early Years pastoral notes system can be accessed from the internet using your web browser. Recommended Browsers include Chrome, Edge and Safari.

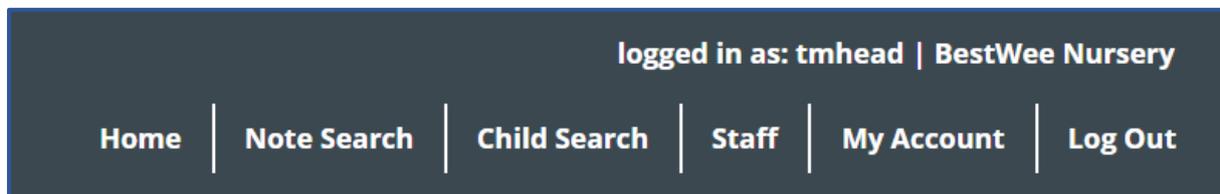
www.earlyyears.org.uk

Your login details, which include your username and password, will be sent to you by email. Please make sure you change your password at your earliest convenience.

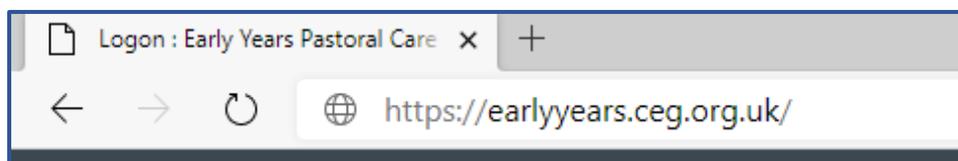
Throughout the system if you enter something that is not valid or leave something blank that is required, you will see a red warning box with information about what has been missed. You must fix the errors before you can proceed.



This guide will cover all elements of the Main Menu which you will find on the top row of the system.



1. Launch your browser and go to the web address <https://earlyyears.org.uk>



The login screen will appear.

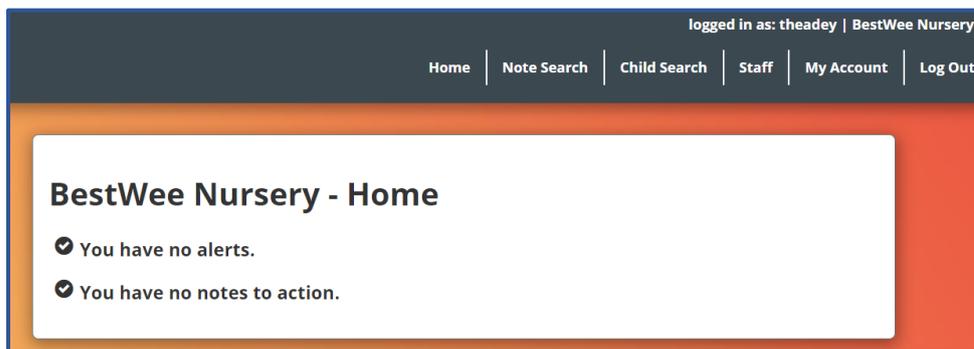
2. Type your username and password in the boxes provided and click login.



The image shows a login form with two input fields and a button. The first field is labeled 'Username (*)' and contains the text 'theadey'. The second field is labeled 'Password (*)' and contains a series of dots. Below the fields is a green button with the text 'Login'.

If you have provided the correct details you will now have access to the system and be placed in the home screen

3. If you have any alerts or notes to action they will be displayed on the Home Page.

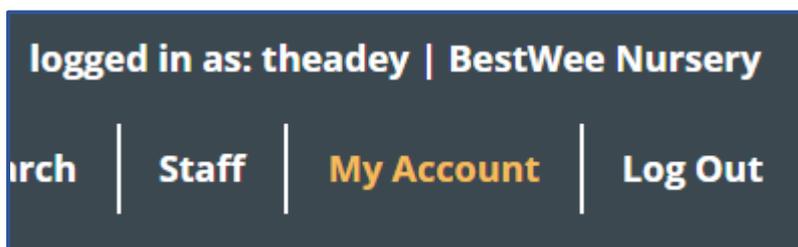


The image shows a screenshot of the BestWee Nursery Home page. At the top, it says 'logged in as: theadey | BestWee Nursery'. Below this is a navigation menu with links for 'Home', 'Note Search', 'Child Search', 'Staff', 'My Account', and 'Log Out'. The main content area is titled 'BestWee Nursery - Home' and contains two status messages: 'You have no alerts.' and 'You have no notes to action.', both with checkmark icons.

UPDATING YOUR ACCOUNT

If this is the first time you have accessed the system it's a good idea to change your password, set your security question and check your profile. When your account was created it will have automatically created a username using your initial and surname with a suffix of EY for Early Years. You can also choose to change your username in the My Account area.

1. Click the My Account button to access your personal details.



The image shows a screenshot of the navigation menu. At the top, it says 'logged in as: theadey | BestWee Nursery'. Below this are four buttons: 'Search', 'Staff', 'My Account', and 'Log Out'. The 'My Account' button is highlighted in orange.

Links for changing your account information will be displayed.

2. Select My Username from the list provided.

My Account

From here you can update your username, password and profile information.

- [My Username](#)
- [My Password](#)
- [My Profile](#)
- [My Security Question](#)
- [Resend Validate Email](#)

The screen to change your username will be displayed.

3. Type your new username in the box provided and click Change Username or Cancel if you no longer wish to proceed.

My Username

current username
theadey

new username

password

If you changed your username you will get a message to say that your username was changed successfully and you should use this the next time you login.

4. Click on My Account again to return to the list of options. Select My Password.

My Password

current password

new password

confirm password

You will need to provide your current password, type your new password twice and click Change Password. Again, you will be provided with a message to say your Password was successfully changed.

5. Click on My Account again to return to the list of options. Select My Profile.

My Profile

current password

first name **last name**

email address

This is where you can change your email address if required.

6. Click on My Account again to return to the list of options. Select My Security Question.

My Security Question

my current password

my password question **my password answer**

Type your password along with a question and answer that can be used if you forget your password and are locked out of the system. Click Update Security Question to make changes.

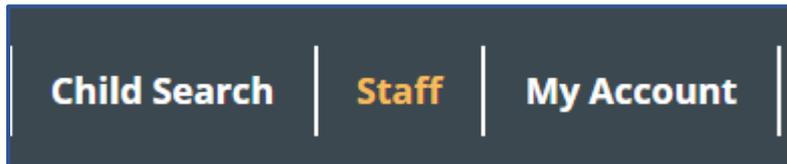
7. Click on My Account again to return to the list of options. Select Resend Validation Email. You will only be required to do this if you did not receive the initial validation email when your account was created.

Resend Validation Email

CREATE/EDIT STAFF

Only those with administrator (Admin) privileges will have the ability to create Staff accounts. Staff with a User account will not see the staff button.

1. Click Staff from the Main Menu.



This will give you access to create new staff and amend details of existing staff.

2. Click the link to Create a new Staff Member.

Staff Management : BestWee Nursery

[+ Create a new Staff Member](#)

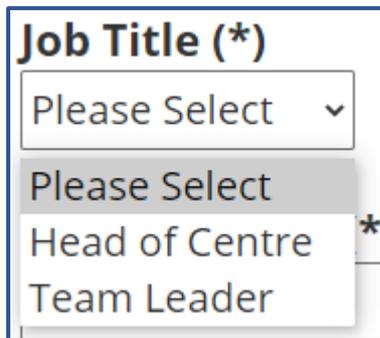
Surname	Firstname	Job Title	Email Address	Username	Role	Active	
Head	JF	Head of Centre	joanfleming@btinternet.com	jheadey	SettingAdmin	Yes	
Head	MD	Head of Centre	miriam@edict.co.uk	mheadey	SettingAdmin	Yes	
Head	TM	Head of Centre	tricia@edict.co.uk	tmhead	SettingAdmin	Yes	

3. All items marked (*) are required before the Staff account can be created. Type Firstname and Surname.

Create Staff Member

Firstname (*) <input type="text" value="Ann"/>	Surname (*) <input type="text" value="Smith"/>
Job Title (*) <input type="text" value="Please Select"/>	SAP Number / Employee Id <input type="text"/>
Email Address (*) <input type="text"/>	Role (*) <input type="text" value="Please Select"/>

4. Click the down arrow for the options for Job Title (*). Currently the options are Head of Centre or Team Leader. This list can be amended at authority level so may have changed since this guide was created. Select the option you require.



Job Title (*)

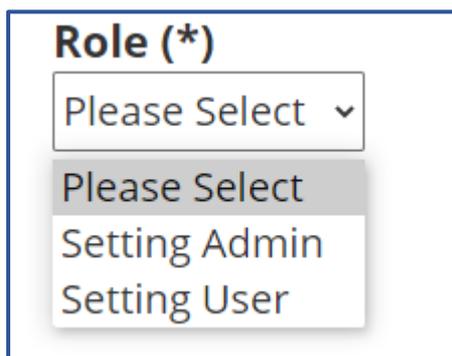
Please Select ▾

Please Select

Head of Centre *

Team Leader

5. Type in the SAP Number or Employee ID where appropriate and also the email address of the member of staff. This email address will be used to send the login details and validation email, so it must be a valid email address for the staff member.
6. Select the Role for the staff member that you are creating. The Setting User will only be able to create and view pastoral notes for all children in the setting. The Setting Admin will also be able to create Staff and Pupils within the system.



Role (*)

Please Select ▾

Please Select

Setting Admin

Setting User

7. Click Create Staff when you are ready.



Create Staff **× Cancel**

A message will appear saying that the staff member has successfully been created and they will receive two emails. One email will contain the web link and login details. The second email will contain a link to validate the email address used.

8. You will now see the new staff member on your list.

Staff Management : BestWee Nursery

[Create a new Staff Member](#)

Surname	Firstname	Job Title	Email Address	Username	Role	Active	
Head	JF	Head of Centre	joanfleming@btinternet.com	jheadey	SettingAdmin	Yes	
Head	MD	Head of Centre	miriam@edict.co.uk	mheadey	SettingAdmin	Yes	
Head	TM	Head of Centre	tricia@edict.co.uk	tmhead	SettingAdmin	Yes	
Jones	Ann	Head of Centre	tricia@edict.co.uk	ajonesey	SettingAdmin	Yes	
MacGregor	Louise	Team Leader	lm@beewee.nurseryorg.com	lmacgregorey	SettingUser	Yes	
McKeating	Patricia	Team Leader	tricia@edict.co.uk	pmckeatingey	SettingUser	Yes	
Smith	Ann	Team Leader	tricia@edict.co.uk	asmthey	SettingUser	Yes	

9. There are now 3 icons that can be used for management tasks. View, Update, Reset Password



View simply lets you see the details.

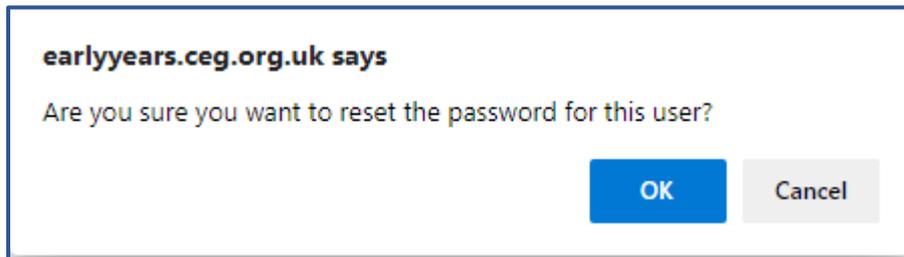
10. Click Update on a staff account.

Update Staff Member

Firstname (*) <input type="text" value="Ann"/>	Surname (*) <input type="text" value="Smith"/>
Job Title (*) <input type="text" value="Team Leader"/>	SAP Number / Employee Id <input type="text" value="1234567"/>
Email Address (*) <input type="text" value="tricia@edict.co.uk"/>	Role (*) <input type="text" value="Setting User"/>
Left Date <input type="text"/>	Active <input checked="" type="checkbox"/>

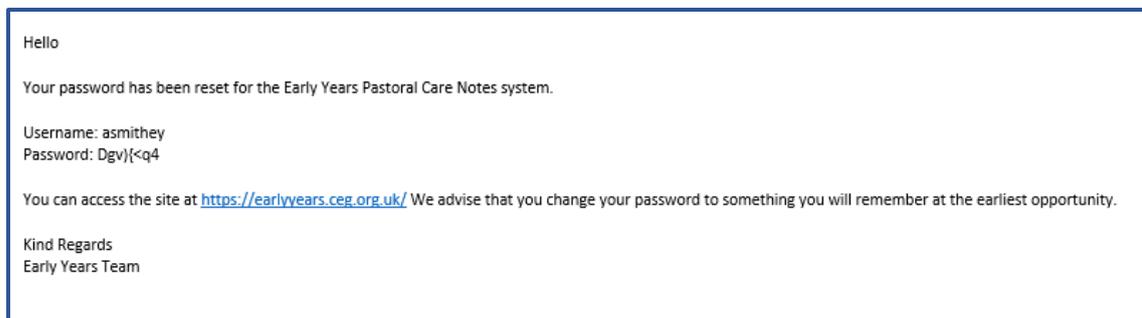
From this screen you can amend any of the details for the user. You can also uncheck the active box if they leave and also insert a Left Date. If you have made any changes remember to update staff.

11. Return to the Staff Management List. Click Reset Password.



A pop up window will appear asking you to confirm you wish to reset the password. If you Click OK the password will be changed and the user will get an email listing the new password. Click cancel if this was not your intention for this user.

12. If they check their email they will see something similar to the email below.



Note: As Admin of the system you cannot see or change the password for a staff member, you can only reset it for them. The user should be encouraged to change it to something memorable.

CREATE A CHILD

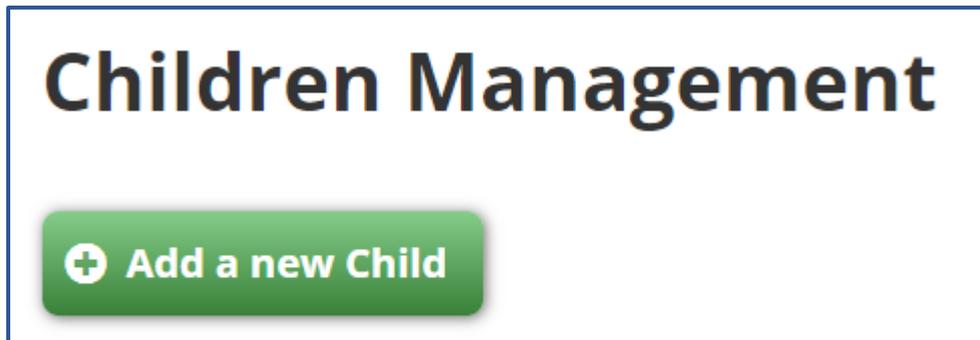
The following instructions are for manually creating a child. Glasgow City Council HQ will be automatically populating the bulk of your accounts.

1. Click Child Search from the Main Menu.



The Children Management window will be displayed.

2. Click Add a new Child. (If you do not see this button you are not an Administrator for your Setting).



The Create Child window will be displayed.

3. Fill in all the details that you have, remember that anything marked with (*) is required and you will not be able to save the record until you have filled in the details.

Create Child

Firstname (*) <input type="text" value="Alana"/>	Surname (*) <input type="text" value="Busnelo"/>
Gender (*) <input type="text" value="Female"/>	Date Of Birth (*) <input type="text" value="01/01/2017"/>
Address One (*) <input type="text" value="6 Glasgow Street"/>	Address Two <input type="text"/>
Address Three <input type="text"/>	Town (*) <input type="text" value="Glasgow"/>
Postcode (*) <input type="text" value="G1 1AB"/>	Phone Number (*) <input type="text" value="0141 222 1342"/>
SEEMIS Reference Number (*) <input type="text" value="1234567"/>	Admission Status (*) <input type="text" value="Current"/>

4. Scroll down to access further details to enter. Child Protection, LAC Status and Non Disclosure are check boxes. The start and end date of each option will only display if the check box is clicked. Fill in the required details and click Create Child.

Stage (*)

Child Protection

Child Protection Start Date

Child Protection End Date

LAC Status

LAC Status Start Date

LAC Status End Date

Non Disclosure

Non Disclosure Start Date

Non Disclosure End Date

A message will appear saying that the child has been created successfully. If there are any errors you will be notified and will not be able to continue until you have fixed them.

5. Scroll down and you will see the new child has appeared on the list.

Per Page 10 ▾ Showing items 1 through 8 of 8. 1

Check here to select all Children. Removing the check will deselect all.

Surname	Firstname	Date Of Birth	
2 Bob	McGlumfer	04/07/2017	<input type="checkbox"/>
Burns	Romeo	04/07/2016	<input type="checkbox"/>
Busnelo	Alana	01/01/2017	<input type="checkbox"/>
McFadden	Pocahontus	04/07/2017	<input type="checkbox"/>
2 McGlumfer	Jessica	04/07/2018	<input type="checkbox"/>
Skywalker	Luke	01/08/2017	<input type="checkbox"/>
Skywalker	Luke	01/08/2017	<input type="checkbox"/>
Wolfe	Winston	22/03/2017	<input type="checkbox"/>

Note: if you have lots of children you may have to use the per page drop down to see all children or move forward pages.

6. You can View a child's details using the icon highlighted below.

Surname	Firstname	Date Of Birth	
2 Bob	McGlumfer	04/07/2017	<input type="checkbox"/>
Burns	Romeo	04/07/2016	<input type="checkbox"/>
Busnelo	Alana	01/01/2017	<input type="checkbox"/>
McFadden	Pocahontus	04/07/2017	<input type="checkbox"/>

7. You can update a child's details using the icon highlighted below. For example, if they have changed phone number or address.

Surname	Firstname	Date Of Birth	
2 Bob	McGlumfer	04/07/2017	<input type="checkbox"/>
Burns	Romeo	04/07/2016	<input type="checkbox"/>
Busnelo	Alana	01/01/2017	<input type="checkbox"/>
McFadden	Pocahontus	04/07/2017	<input type="checkbox"/>

ADDING OR REMOVING A SETTING FOR A CHILD

A child can exist in more than one setting and you can choose whether to share notes with the other setting at creation. This section will detail how to add / remove or change the main setting for a child.

1. Click Child Search from the Main Menu and scroll past the filter options to see the list of children.
2. Click the settings button to the right of the Child in question.

Busnelo	Alana	01/01/2017	    
 McFadden	Pocahontus	04/07/2017	     

The View Child Settings window will be displayed.

3. Note the Main Setting is listed for the child.

View Child Settings

Fullname: Alana Busnelo

Main Setting: BestWee Nursery

No other settings for this child.

Add Additional Setting

Setting (*)

Please Select 

- Click the drop-down arrow under Setting (*)

Setting (*)

Please Select

Please Select

New Nursery

Somewhere Early Years

Test Setting 1

Previous Page

A list of additional settings will be displayed.

- Select the Setting you wish to add and click Add Setting.

Add Additional Setting

Setting (*)

New Nursery

Add Setting

← Previous Page

A message will appear to inform you that the new setting has been added to the record for that child.

- Note: from the screen below, using the key, you now get the option to make the new setting into the main setting for the child.

View Child Settings

✓ New Nursery was added to Alana Busnelo successfully

Fullname: Alana Busnelo

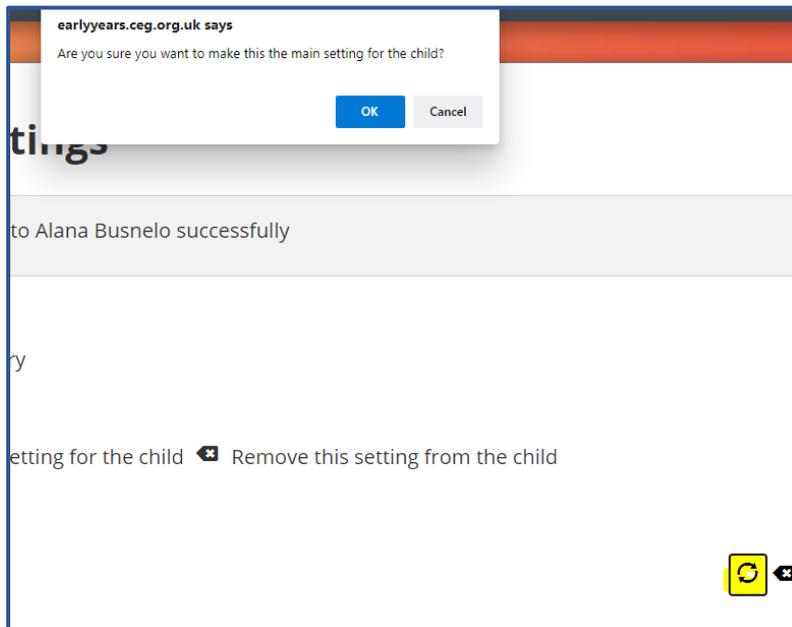
Main Setting: BestWee Nursery

Key: Make this the Main Setting for the child Remove this setting from the child

Name

New Nursery

7. Click the Circular arrows, highlighted below, to make this the main setting for the child.



A Message will appear for you to confirm this action. Select OK to accept or Cancel to ignore.

8. You can also remove a setting for a child by clicking the remove setting icon highlighted below.



You will no longer have the option to share notes with the other setting once it has been removed.

VIEW NOTES FOR A CHILD USING CHILD SEARCH

There are two ways to view notes using either Child Search or Note Search.

1. Click Child Search.



Filter options will be displayed and a list of children in your setting paginated at the bottom of the screen.

- You can filter on the fields shown to find a child and their notes. Admission Status will default to current, but you can change that using the drop down to look at details of a child that has left.

You can use any of the tick boxes to search on only children who have a tick in Child Protection, LAC or Non Disclosure. For this example we have entered the surname McGlumfer.

Admission Status
Current

First Name

Surname
mcglumfer

Date of Birth

Address

Town

Postcode

Child Protection

LAC Status

Non Disclosure

Note Filters
 All Children
 Children with Notes
 Children without Notes

- Once you have added your search criteria, click the search button.

[Search](#) [Export Notes to PDF](#)

Per Page 10 Showing items 1 through 2 of 2. 1

Check here to select all Children. Removing the check will deselect all.

Surname	Firstname	Date Of Birth	
2 McGlumfer	Bob	04/07/2017	Search Edit Print Add Remove
2 McGlumfer	Jessica	04/07/2018	Search Edit Print Add Remove

The children that match that criteria will be displayed.

CREATE A NOTE INCLUDING ADVANCED OPTIONS

1. Click Child Search and locate the child you wish to add a note for. Click the Add Note icon on the same row as the child's name.

Busnelo	Alana	01/01/2017	🔍 ✎ 📅 📌
✎ McFadden	Pocahontus	04/07/2017	🔍 ✎ 📅 📌 + Add note

2. Select the date from the date picker for the note. It will default to today's date.

Event Date (*)

04/08/2020

Aug 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

The date will be saved into the Event Date field.

3. Select the owner of the note from the drop-down list, it may not necessarily be the person actually typing the data.

Owner (*)

TM Head

Please Select

JF Head

MD Head

TM Head

Ann Jones

Louise MacGregor

Patricia McKeating

Ann Smith

4. Select the Category Type for the note from the drop-down list of available options.

Category Type (*)

Please Select ▾

Please Select

Attendance) ▾

Behaviour ▾

Other

Pastoral

5. Select the Event Type. Most items will fall into the General type. Significant events should be used for Child Protection, Social Work or changes to a child's circumstances that would significantly affect the wellbeing of a child.

Event Type (*)

Please Select ▾

Please Select

General Event

Significant Event

6. Type the text of the note. Note at the right hand side you have a spell-check option, also at the bottom right hand corner you can drag the box to make it larger if you want to add more text than the current size allows.

Note Text (*)

Alana has not been attending nursery particularly on Monday mornings.





7. You will have the option to share with other settings. This will only be shared if the child has the setting listed in the settings area seen previously.

Share with other Settings

8. If you select advanced options you can delegate actions to other members of staff. If you select to highlight, the child will stand out in colour when staff look at the list of children.

Advanced Options

<p>Action Required By Patricia McKeating ▾</p>	<p>Action Monitor attendance on a Monday</p>
<p>Deadline Date 31/08/2020</p>	<p>Highlight Until Date 31/08/2020</p>
<p>Highlight Text Monitor attendance on a Monday</p>	

The highlight will be red for 7 days and then turn amber until the date listed in the Highlight Until Date.

9. While creating a note you also have the option to link a note with another child.

Link Note

<p>Linked Text (*)</p> <div style="border: 1px solid gray; height: 60px; width: 100%;"></div>	<p>Children to Link (*)</p> <p><input type="checkbox"/> Romeo Burns</p> <p><input type="checkbox"/> Pocahontus McFadden</p> <p><input type="checkbox"/> Bob McGlumfer</p> <p><input type="checkbox"/></p>
--	--

After the note is created you will see a small paperclip denoting it's a linked note. You can also select multiple children from this list.

10. You can create an alert and select staff members to alert.

Create Alert

Alert Text (*)
Alana Busnelo has a new pastoral note.

Staff to Alert (*)

JF Head

MD Head

TM Head

Ann Jones

Anyone checked in this will receive an email, and see an alert when they login, on the Home page of the system.

11. Finally select Create Note and this will save all the information added as well as any highlights, alerts and links that were added.

Create Note **X Cancel**

CREATE A NOTE FOR MULTIPLE CHILDREN

There may be an instance where multiple children have been involved in an incident that has to be recorded as a Pastoral Note.

1. Click Child Search.
All children will be displayed
2. You can select all children in the setting using Click here to select all Children. Alternatively, you can use the check box at the far right of the screen to multi-select children.

Check here to select all Children. Removing the check will deselect all.

Surname	Firstname	Date Of Birth	
2 Burns	Romeo	04/07/2016	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3 Busnelo	Alana	01/01/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
McFadden	Pocahontus	04/07/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2 McGlumfer	Bob	04/07/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
2 McGlumfer	Jessica	04/07/2018	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
Skywalker	Luke	01/08/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skywalker	Luke	01/08/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Wolfe	Winston	22/03/2017	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

0 children selected

+ Add Note to Selected Children

3. Once you have chosen the children. Click Add Note to Selected Children. There is an indication of how many children have been selected.

2 children selected

+ Add Note to Selected Children

The Create Note screen will be displayed.

4. Fill in the data as before when creating a note for one child.

Event Type (*)
General Event ▾

Note Text (*)
Bob and Jessica involved in biting incident 

Share with other Settings

Advanced Options

LinkNote

Create Alert

Create Note **✕ Cancel**

5. When you have finished click Create Note.

Pastoral Notes

 Notes were successfully created for 2 children.

A message will appear indicating how many notes have been created.

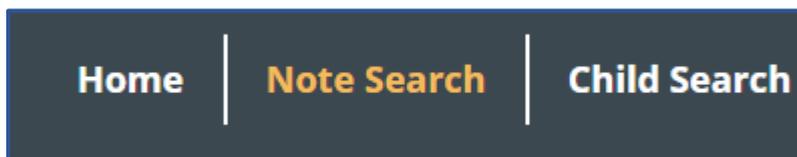
- If you follow the previous instructions to view notes you will see the same note added to both children.

- **Owner:** TM Head
- **Category Type:** Behaviour
- **Event Type:** General Event
- **Event Date:** 04/08/2020

Note: Bob and Jessica involved in biting incident

SEARCH FOR NOTES

- Click Note Search from the Main menu.



The Pastoral Notes screen will appear.

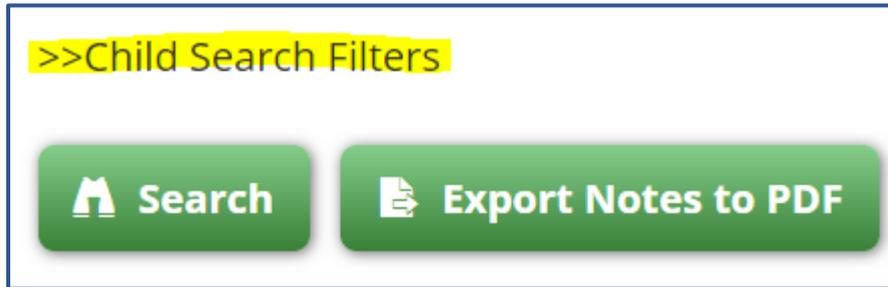
- You can fill in as many criteria as you like to find the note you are looking for. Make sure your date range is correct. Some useful filters here include Action By Me, Created by Me, Linked Notes etc.

Pastoral Notes

Owner <input type="text" value="Select options"/>	Category Type <input type="text" value="Select options"/>
Highlighted <input type="checkbox"/>	Event Types <input type="text" value="Select options"/>
Start Date <input type="text" value="01/08/2020"/>	End Date <input type="text" value="31/07/2021"/>
Created By Me <input type="checkbox"/>	Action By Me <input type="checkbox"/>

If you do not apply a criteria and just scroll down you will see all the notes that have been created.

3. You can also search notes by child in this screen by clicking on the expand Child Search filters link.



This will display fields for the children and change the name of the link to Hide Child Filters.

4. These are the fields you can search on using child search filters which are similar to what we have seen before in the Child Search Area

<<Hide Child Filters

Admission Status

1 selected

First Name

Surname

Date of Birth

Address

Town

Postcode

Child Protection

LAC Status

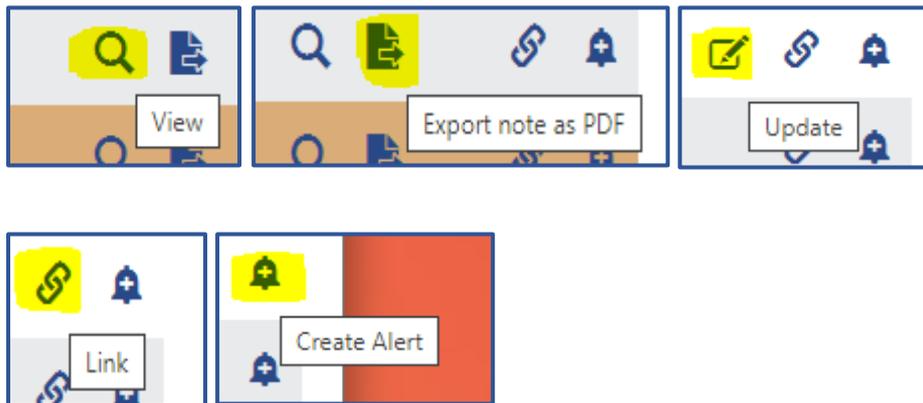
Non Disclosure

5. Whatever you filter on you will then see your results when you click the search button

Bob McGlumfer	30/07/2020	Behaviour	General	    
 Bob McGlumfer	30/07/2020	Pastoral	Significant	   

If it is a linked note you will see a small paperclip to the left of the note summary.

6. Hover over each icon to the right of the notes to see the function of each.



7. If you have notes listed as significant event note that there is no option to update the note.

Bob McGlumfer	30/07/2020	Behaviour	General	
Bob McGlumfer	30/07/2020	Pastoral	Significant	

Note: you can search for only notes that are listed as significant events using the filters.

LINK NOTES

You can link a note at the time of creation or after it is created using Note Search.

1. Click Note Search and locate a note that you wish to link to another child.

Jessica McGlumfer	30/07/2020	Pastoral	Significant	
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2. Click the Link icon to the right of the note summary.

Event Impact: Unknown

Event Info Source: Family

Linked Text (*)

Children to Link (*)

- Romeo Burns
- Alana Busnelo
- Pocahontus McFadden
- Bob McGlumfer
- Luke Skywalker
- Luke Skywalker
- Winston Wolfe

The Link Children screen will be displayed. You must supply link text as well as the child(ren) to link the note to.

3. Type the text, select the child and click link.

Linked Text (*)

Sister has been linked to CP issue.

Children to Link (*)

Romeo Burns

Alana Busnelo

Pocahontus McFadden

Bob McGlumfer

Luke Skywalker

Luke Skywalker

Winston Wolfe

Link **✕ Cancel**

An alert will appear asking you to confirm the link.

4. Click Ok to link this note to the other child.

earlyyears.ceg.org.uk says

Are you sure you want to link the selected children to this note?

OK **Cancel**

A message will appear saying the link has been successful. The note will be displayed.

5. To view the children linked in this note click the paper clip icon next to the link text.

Linked Note

 Sister has been linked to CP issue.

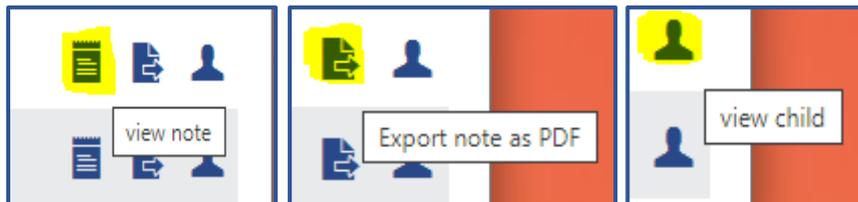
Unlink Note

The content of the note will be displayed and at the bottom the list of children linked in the note will be shown.

- The list of linked children also have further action buttons.

Children Linked to this Note			
Fullname	Main Setting	DateLinked	
Jessica McGlumfer	BestWee Nursery	05/08/2020	  
Bob McGlumfer	BestWee Nursery	05/08/2020	  

- From this screen you can View the Note, Export the note or View the child.

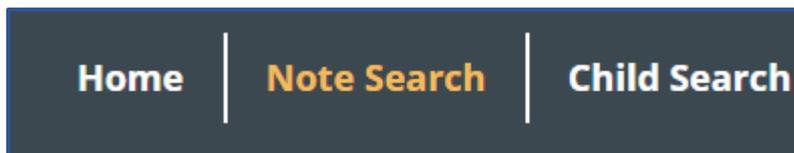


- Only Authority Users can unlink notes.

CREATE AN ALERT

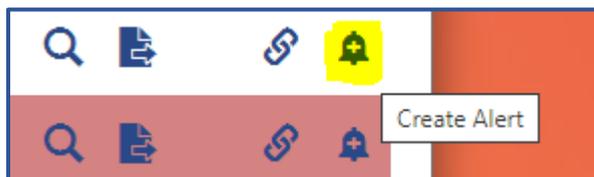
You can create an alert when adding a note, or you can create one after the note has been created. We have already seen in the Create a Note section how to add an alert when it is being created. This section will detail how to add an alert to a note that has already been created.

- Click Note Search



The Pastoral Notes screen will be displayed.

- Use the filters to find the note that you wish to add the alert to.



3. Click the icon to Create Alert on the same row as the note you have selected.

Alert Date (*) <input type="text" value="06/08/2020"/>	Alert Text (*) <input type="text" value="Bob McGlumfer has a new pastoral note."/>
Staff to Alert (*)	
<input type="checkbox"/>	
JF Head	
<input type="checkbox"/>	
MD Head	
<input type="checkbox"/>	

Today's date will be placed in the Alert Date box and the pupil name along with standard Text is placed in the Alert Text box. This can be changed if required.

4. Scroll down and select the member(s) of staff to be alerted. Click to select each in turn.

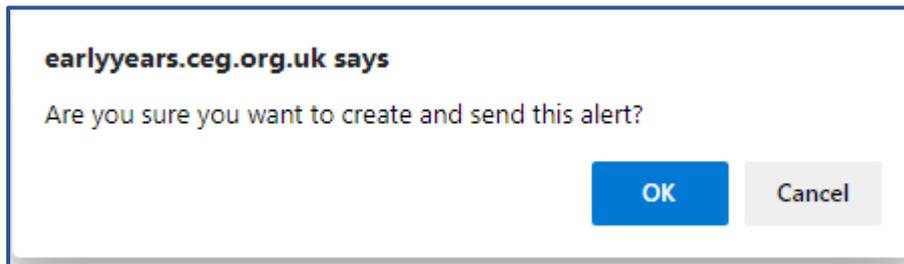
Staff to Alert (*)
<input type="checkbox"/>
JF Head
<input checked="" type="checkbox"/>
MD Head
<input checked="" type="checkbox"/>
TM Head
<input type="checkbox"/>
Ann Jones

5. Click Create Alert.

<input type="button" value="Create Alert"/> <input type="button" value="X Cancel"/>

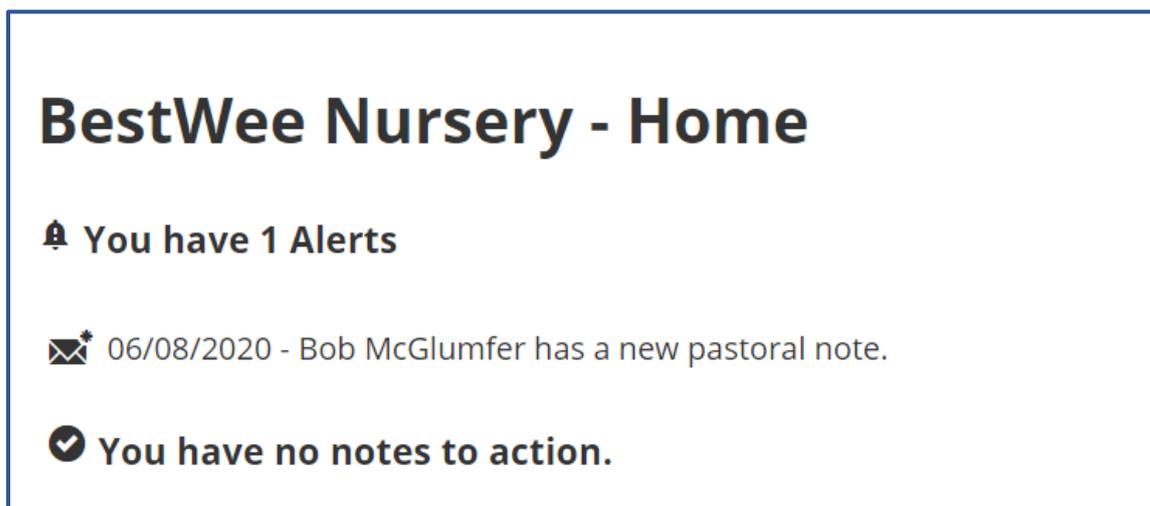
A message will appear asking if you wish to send the alert.

6. Click Ok to send or cancel if you do not wish to send the alert.

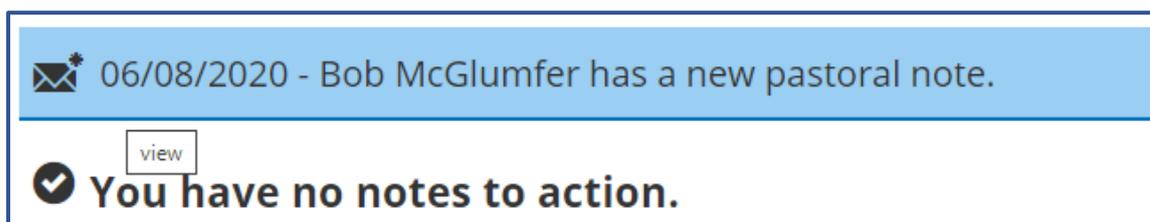


Two things will happen when an alert is created. The staff chosen will receive an email, and the alert will also be displayed on the Homepage for the member of staff when they login.

7. Click the Home Button on the Main Menu to see if you have any alerts.

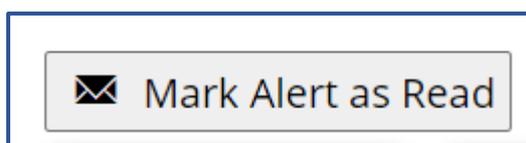


8. To remove an alert, Click the item listed on your Home page.



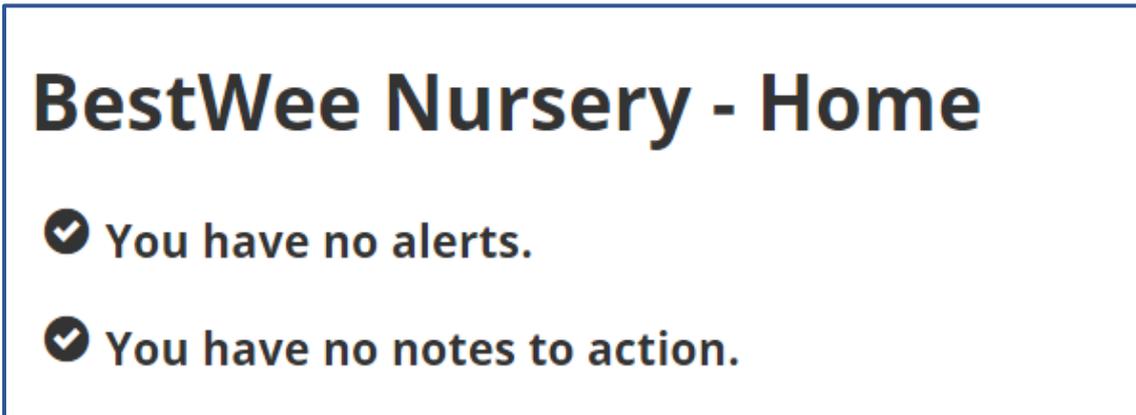
You will be taken to the View Note screen.

9. Scroll down and click the Mark Alert as Read button.



You will get a message asking for confirmation.

10. Click Yes to confirm. If you now go to your Home screen the Alert will have been removed.



CREATE PDF'S FOR ONE OR ALL NOTES THAT CAN BE SAVED OR PRINTED

In order to extract information to add to a report or take to a meeting, you can produce PDF files that can be saved or printed. You can produce: -

- 1. An individual note as a PDF
- 2. A filtered list of notes for one child e.g. for a selected time period or selected type of note
- 3. A filtered list of notes for multiple children e.g. all notes for siblings

1. Select Note Search from the Main Menu.

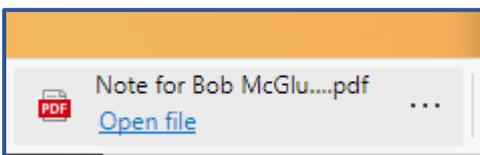


2. Scroll down or filter to locate the note you wish to export. Click the Export Note as PDF on the same row as the note.

Bob McGlumfer	06/08/2020	Pastoral	General					
Bob McGlumfer	06/08/2020	Attendance	General					

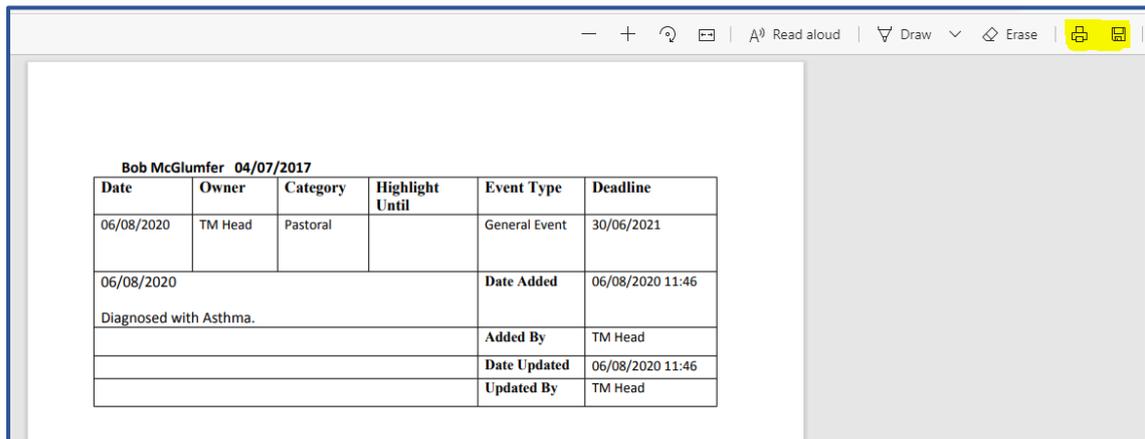
Depending on your browser you will get a notification that the PDF is being Created.

3. Click the notification to Open file. If you do not see a notification, you will find the file in the Downloads folder on your computer.

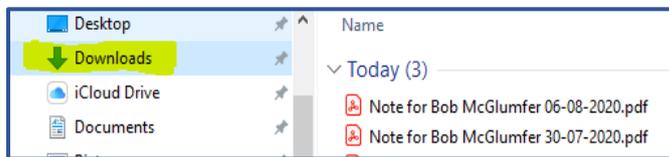


The PDF file will open.

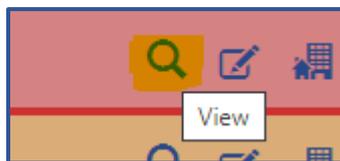
- You can use the standard functions in the PDF Viewer to Save or Print.



- If you do not see a notification within your browser check your Downloads Folder on your computer as it will be placed there after download.



- Select Child Search to now print all notes for a child. Filter to display only the child you wish to export notes for, and click the spyglass to View notes.



Scroll down to see all notes.

- You can either select to Export Notes or Export Advanced Notes which will also display all the actions. Click one of the buttons.



The PDF will be generated.

- Open the PDF as we did previously for one note.

Bob McGlumfer 04/07/2017		
06/08/2020 TM Head Significant Event Event Action: Monitor Bob's behaviour and mood. Event Impact: Unknown Event Info Source: Family Family Issues.	Date Added	06/08/2020 11:44
	Added By	TM Head
	Date Updated	06/08/2020 11:44
	Updated By	TM Head
06/08/2020		
Bob McGlumfer 04/07/2017		
06/08/2020 TM Head Diagnosed with Asthma.	Date Added	06/08/2020 11:46
	Added By	TM Head
	Date Updated	06/08/2020 11:46

This time you will see multiple notes for the selected child.

- The final option is to export notes of a selected type for multiple children. For this example we are going to export all Significant Events with Advanced Options.
- Click Note Search. Select Significant Event for the Event Type.

Event Types

Significant Event ▼

select all

General Event

Significant Event

This is only an example, you can use any of the fields to filter on the notes you wish to export.

11. Click Search to Apply the Filter



Only notes of that type will be displayed.

12. Click Export Advanced Notes to PDF.

Jessica McGlumfer 04/07/2018					
Date	Owner	Category	Highlight Until	Event Type	Deadline
30/07/2020	TM Head	Pastoral		Significant Event Event Action: Monitor Event Impact: Unknown Event Info Source: Family	
30/07/2020				Date Added	30/07/2020 11:56
CP Issue				Added By	TM Head
				Date Updated	05/08/2020 11:27
				Updated By	TM Head
Bob McGlumfer 04/07/2017					
Date	Owner	Category	Highlight Until	Event Type	Deadline
30/07/2020	TM Head	Pastoral			

All notes, no matter which child, will be displayed. In the Note Search you can also apply Child Filters using the Child Search Filters section.



CREATING A CHRONOLOGY FOR A CHILD

For some meetings you may be asked to provide a Chronology for a child. This is simply done by gathering all notes for a selected time period and producing a PDF.

1. Click Child Search from the Main Menu.



Filtering options and a list of the children in your setting will be displayed.

2. Use what you have learned earlier to locate the child and Click the View button on the same row as the child you have located.

2	McGlumfer	Bob	04/07/2017	    
3	McGlumfer	Jessica	04/07/2018	     <small>View</small>

The child's pastoral notes will be displayed

3. Select the date Range from Start and End Date for the notes that you wish to appear in the Chronology and Click Filter.

Category Type

Event Type

Start Date

End Date

Any To be Actioned Actioned

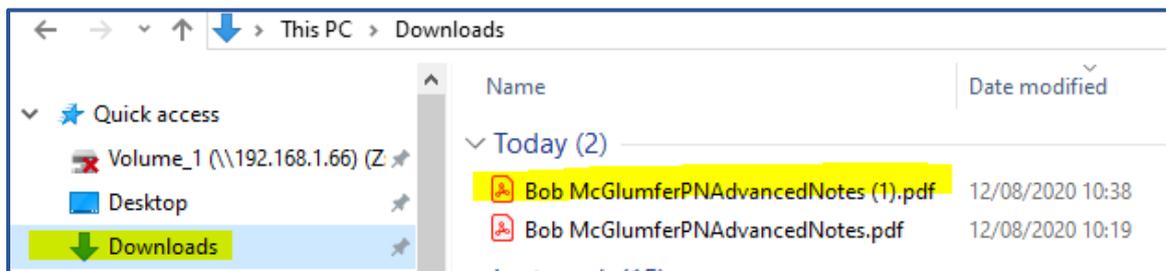
The notes for a selected date range will be listed.

4. Click to Export Advanced Notes to PDF.

Start Date 01/08/2020	End Date 31/07/2021	
<input checked="" type="radio"/> Any <input type="radio"/> To be Actioned <input type="radio"/> Actioned		
Filter Export Notes to PDF Export Advanced Notes to PDF		
▸ Event Date: 12/08/2020	Category Type: Attendance	Event Type: General Event
▸ Event Date: 07/08/2020	Category Type: Pastoral	Event Type: Significant Event
▸ Event Date: 06/08/2020	Category Type: Pastoral	Event Type: Significant Event
▸ Event Date: 06/08/2020	Category Type: Pastoral	Event Type: General Event

The PDF will be downloaded.

5. You will find the PDF either at the bottom of your web page or in the downloads folder on your computer.



You can now open the pdf and choose to Save to another location or Print.