Tip Sheet

54 - Targeted Funding Summary

Applies To

The Targeted Funding Summary is available from the *Exports & Reports* menu in the Access edition of Take2 and from the ODBC Statistical Reporting utility in the SQL Server edition.

Overview

Take2 provides a summary report that allows you to monitor your performance in delivering positive outcomes for Targeted Funding trainees – i.e. TOPS and Youth Trainees. The summary provides a pivot table to cross tabulate withdrawal, outcome and demographic data, as well as an Excel audit report that lists the individual trainees counted in the pivot table..

Ensuring Data is Reported

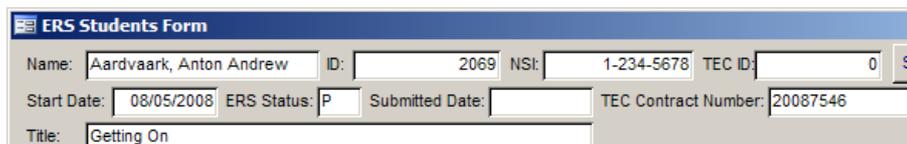There are a number of steps required to ensure that data is reported.

1. Trainees must have been enrolled in TOPS or Youth Training offered qualification that has a TEC contract number and has been assigned the appropriate *Type* value on the *Curriculum* form.
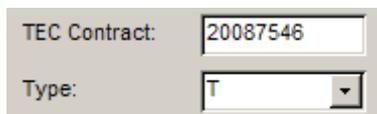
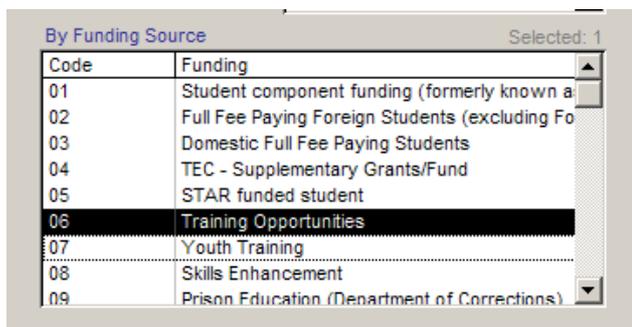2. Trainees must have been processed on the *ERS Students* form so that they have an *ERS Status* value.

Creating the Summary

3. Click *Targeted Summary* and first enter a date selection. You can select all enrolments in a given year or just enrolments that either start or finish in a given date range.

4. Next use the other filter options to narrow down your selection if required. For example you may use the *Funding Source* filter to ensure that only TOPS are reported.

5. Click *Filter* and, if you wish to create an audit report, click *Yes* to do so when prompted. The audit report is called Targeted Summary.xls by default.
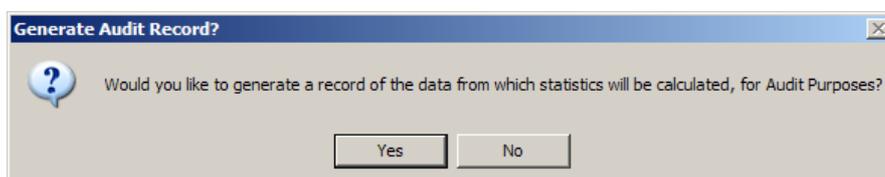
Using the Summary

When the Summary is created a Excel window will open and a pivot table is displayed. It will show old data and so first of all you must refresh the pivot table.

6. Place you cursor anywhere in the pivot table and right mouse click. Select *Refresh Data*. The totals shown in the bottom summary section of the pivot table will be updated.

7. Now you can use the features of the pivot table to filter and to change the layout of the summary section. The top section contains a list of fields. These can be used in two ways:

    a. You can click on the drop down arrow to set a filter. As you do so you will notice that the totals in the summary section change.

    b. You can drag the fields from the top section into the bottom section to change what is being tabulated. Note that you can also drag fields from the summary section back up into the top section.

Internal Code	(All)		
Type	(All)		
Referrer	(All)		
Age	(All)		
Priority Ethnicity (2 digit)	(All)		
ERS Status	(All)		
Gender	(All)		
Prioritised Ethnic Group	(All)		
Ethnicity 1 (3 digit)	(All)		
Ethnicity 2 (3 digit)	(All)		
Ethnicity 3 (3 digit)	(All)		
Ethnic Group 1	(All)		
Ethnic Group 2	(All)		
Ethnic Group 3	(All)		
WD Code	(All)		
WD Other	(All)		
Overdue	(All)		
Related	(All)		
Pos/Neg	P		
Outcome Organisation	(All)		
Class	(All)		
Tutor	(All)		
Enrolled Less than One Week	No		

Count of Name	Outcome		
Contract	EMP	FPT	Grand Total
23070137	103	110	213
Grand Total	103	110	213

8. When a field is used in the summary section it is also available as a filter. Click the drop down arrow and then tick and untick the available options to set you filter.

Count of Name	Outcome		Total
Gender			
F			113
M			100
Grand Total			213

☑ (Show All)
☑ EMP
☑ FPT
☑ OTH
☑ (blank)

OK   Cancel

9. Notice that there are a range of fields available including fields that are directly relevant to monitoring your outcomes: Pos/Neg (i.e. positive and negative), outcome codes, an indicator that the trainee was enrolled less than one week, etc.

Using the Audit Report

The audit report is an Excel file that lists each trainee who has been counted in the summary report. If, when you look at the summary, the figures don't seem right, then looking at the audit report is the obvious thing to do. It should help you spot problems.

Because the data is stored in Excel you can use the standard Excel features such as sorting and filtering to get information.

10. To set a filter place your cursor in row 1 and select **Data, Filter, Autofilter** from the menu at the top of the Excel window.

11. To sort the audit report place your cursor in row 1 and select **Data, Sort** from the menu at the top of the Excel window and then select which columns you wish to sort by.

Internal Co	Contra	Ty	NSN	Take2	Name	Referrer	Gend	A
TOPS-08	23070137	T	98309572	1796	Anonymous, Student	Work and Income	F	26
TOPS-08	23070137	T	98923011	1114	Anonymous, Student		F	42
TOPS-08	23070137	T	99213100	1412	Anonymous, Student		F	53
TOPS-08	23070137	T	99368799	1840	Anonymous, Student	Work and Income	F	45
TOPS-08	23070137	T	102722869	458	Anonymous, Student		F	50
TOPS-08	23070137	T	102722869	458	Anonymous, Student		F	50
TOPS-08	23070137	T	104982255	1546	Anonymous, Student		F	45
TOPS-08	23070137	T	105155117	1375	Anonymous, Student		F	44
TOPS-08	23070137	T	113407473	1682	Anonymous, Student	Work and Income	F	18
TOPS-08	23070137	T	113958700	1109	Anonymous, Student	Work and Income	F	18
TOPS-08	23070137	T	114649004	1488	Anonymous, Student	Training Provider	F	55
TOPS-08	23070137	T	114848369	1293	Anonymous, Student		F	29
TOPS-08	23070137	T	118136722	1538	Anonymous, Student		F	55
TOPS-08	23070137	T	119518986	1333	Anonymous, Student		F	60
TOPS-08	23070137	T	122047577	1531	Anonymous, Student		F	35
TOPS-08	23070137	T	122324315	1579	Anonymous, Student		F	56
TOPS-08	23070137	T	122329651	1551	Anonymous, Student		F	32
TOPS-08	23070137	T	122391809	1884	Anonymous, Student	Training Provider	F	33
TOPS-08	23070137	T	123151494	1727	Anonymous, Student	Work and Income	F	32
TOPS-08	23070137	T	123545035	1710	Anonymous, Student	Work and Income	F	48
TOPS-08	23070137	T	123545035	1710	Anonymous, Student	Work and Income	F	48
TOPS-08	23070137	T	124590665	1889	Anonymous, Student	Work and Income	F	58
TOPS-08	23070137	T	529251	1620	Anonymous, Student	Training Provider	F	48
TOPS-08	23070137	T	591212	1757	Anonymous, Student	Work and Income	F	37
TOPS-08	23070137	T	3644661	1635	Anonymous, Student	Self, family or whanau	F	24
TOPS-08	23070137	T	3644661	1635	Anonymous, Student	Self, family or whanau	F	25
TOPS-08	23070137	T	9238866	1644	Anonymous, Student		F	32
TOPS-08	23070137	T	9537029	1127	Anonymous, Student	Training Provider	F	57
TOPS-08	23070137	T	9797643	1782	Anonymous, Student	Work and Income	F	23

NOTE: The summary counts only trainees who have been enrolled on the *ERS Students* form.

Tip Sheets 25 and 26 explain how to withdraw trainees and record their outcomes on the ERS Student form.