

Tip Sheet No.54

Targeted Funding Summary

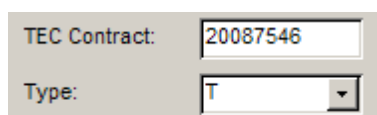
The Targeted Funding Summary is available from the **Exports & Reports** menu in the Access edition of Take2 and from the ODBC Statistical Reporting utility in the SQL Server edition.

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

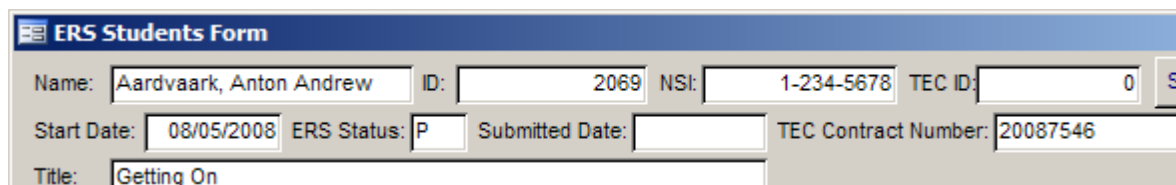
There are a number of steps required to ensure that data is reported.

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.



TEC Contract:
 Type:

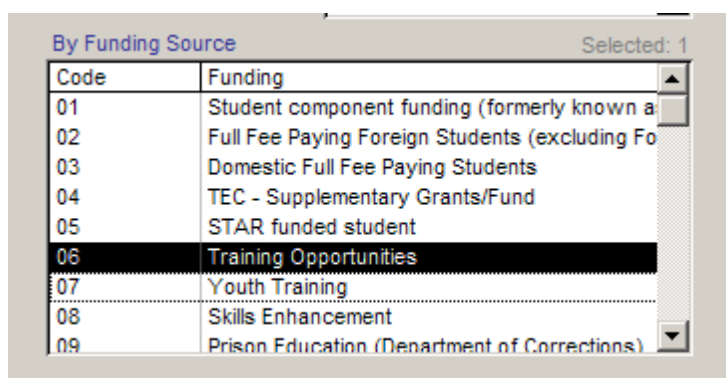
2. Trainees must have been processed on the **ERS Students** form so that they have an **ERS Status** value.



ERS Students Form
 Name: ID: NSI: TEC ID: St
 Start Date: ERS Status: Submitted Date: TEC Contract Number:
 Title:

Creating the Summary

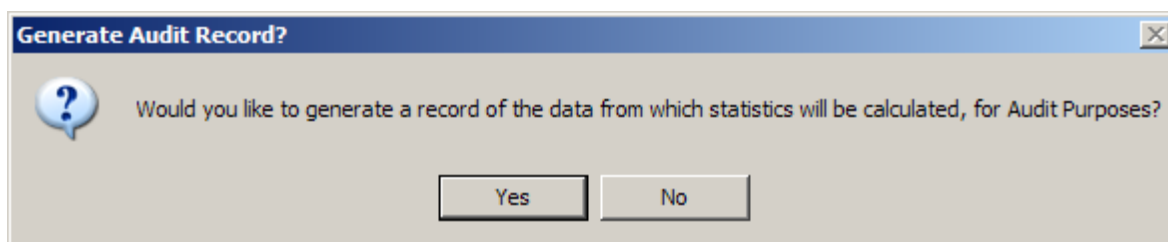
1. Click **Targeted Summary** and first enter a date selection. You can select all enrolments in a given year or just enrolments that either start or finish in a given date range.
2. Next use the other filter options to narrow down your selection if required. For example you may use the **Funding Source** filter to ensure that only **TOPS** are reported.



By Funding Source Selected: 1

| Code | Funding |
|------|---|
| 01 | Student component funding (formerly known as ...) |
| 02 | Full Fee Paying Foreign Students (excluding Fo ...) |
| 03 | Domestic Full Fee Paying Students |
| 04 | TEC - Supplementary Grants/Fund |
| 05 | STAR funded student |
| 06 | Training Opportunities |
| 07 | Youth Training |
| 08 | Skills Enhancement |
| 09 | Prison Education (Department of Corrections) |

3. 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 an 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.

1. Place your 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.

| | A | B | C | D | E | F |
|----|--|-------|---|---|---|---|
| 1 | Targeted Summary - Remember to refresh the table before using the data it supplies. | | | | | |
| 2 | Internal Code | (All) | | | | |
| 3 | Type | (All) | | | | |
| 4 | Referrer | (All) | | | | |
| 5 | Age | (All) | | | | |
| 6 | Priority Ethnicity (2 digit) | (All) | | | | |
| 7 | Prioritised Ethnic Group | (All) | | | | |
| 8 | Ethnicity 1 (3 digit) | (All) | | | | |
| 9 | Ethnicity 2 (3 digit) | (All) | | | | |
| 10 | Ethnicity 3 (3 digit) | (All) | | | | |
| 11 | Ethnic Group 1 | (All) | | | | |
| 12 | Ethnic Group 2 | (All) | | | | |
| 13 | Ethnic Group 3 | (All) | | | | |
| 14 | Gender | (All) | | | | |
| 15 | WD Code | (All) | | | | |
| 16 | WD Other | (All) | | | | |
| 17 | Overdue | (All) | | | | |
| 18 | Outcome | (All) | | | | |
| 19 | Related | (All) | | | | |
| 20 | Pos/Neg | N | | | | |

2. 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) | ▼ | | |
| Contract | (All) | ▼ | | |
| Priority Ethnicity (2 digit) | (All) | ▼ | | |
| ERS Status | (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 | ▼ | | |
| Gender | EMP | FPT | Grand Total | |
| F | 48 | 65 | 113 | |
| M | 55 | 45 | 100 | |
| Grand Total | 103 | 110 | 213 | |

| | | | | |
|------------------------------|---------|-----|-------------|--|
| 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 | |

- 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 your filter.

| | | | | | |
|---|---------------|---------|--|--|-------|
| 5 | | | | | |
| 6 | Count of Name | Outcome | | | |
| 7 | Gender | | | | |
| 8 | F | | | | Total |
| 9 | M | | | | 113 |
| 0 | Grand Total | | | | 100 |
| 1 | | | | | 213 |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 0 | | | | | |

(Show All)
 EMP
 FPT
 OTH
 (blank)

- 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.

- 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.
- 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 | Contrai | Ty | NSN | Take2 | Name | Referrer | Gen | Av |
|-------------|----------|----|-----------|-------|--------------------|------------------------|-----|----|
| 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.