



# Business Intelligence Team V1.0

**Document** CareDirector Business Intelligence Team Bespoke Guide.  
**Purpose** Daily tasks that the Business Intelligence team do on CareDirector.  
**Version** V1.0  
**Owner** ICT Business Transformation Team  
**Last Updated** 01/11/2022

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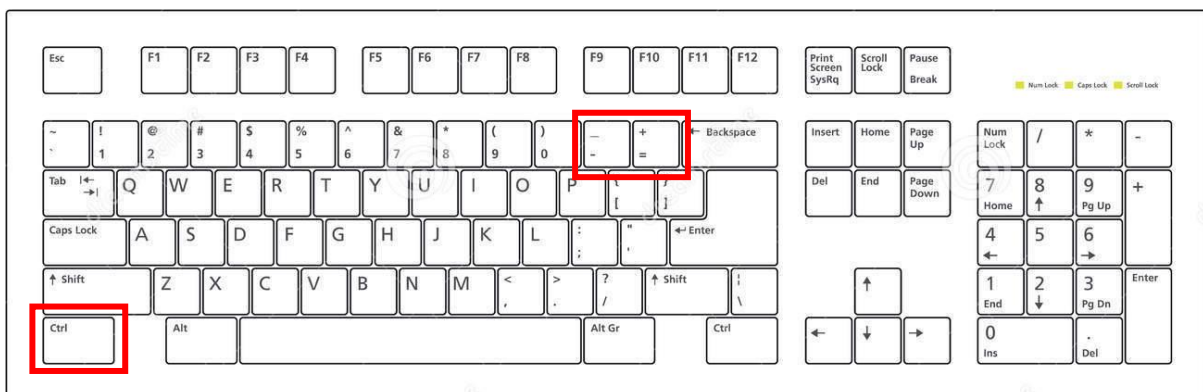
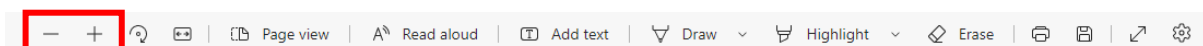
## Guide Information

### Before Live Access...

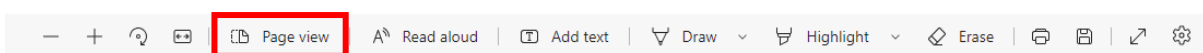
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### Guide Navigation

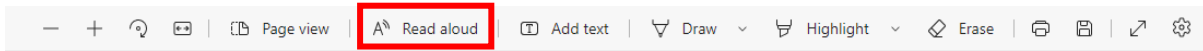
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



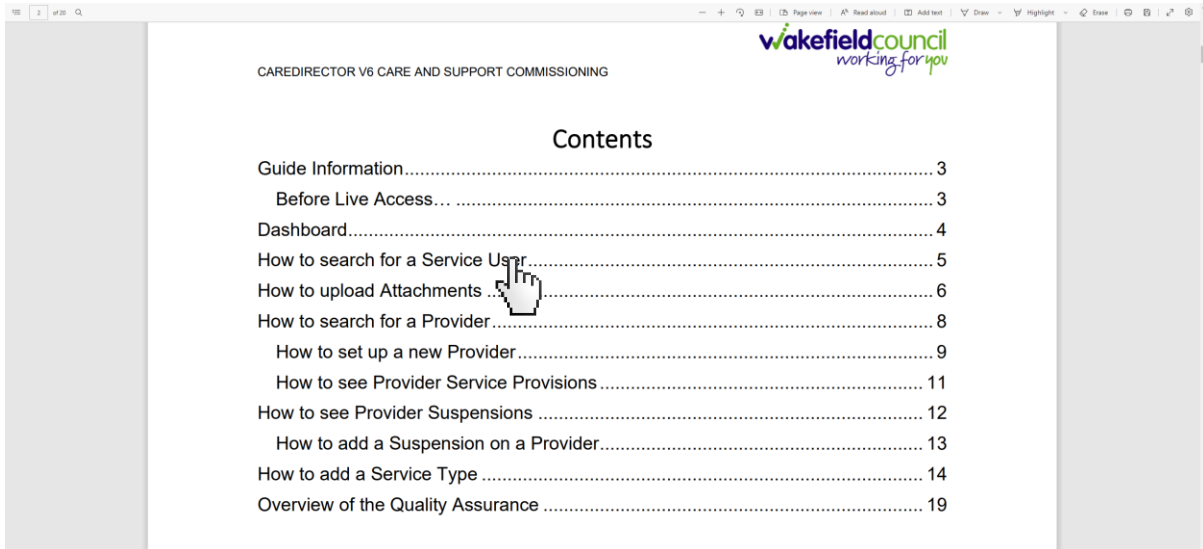
3. To put pages next to one another, select the **Page View** icon on the toolbar.



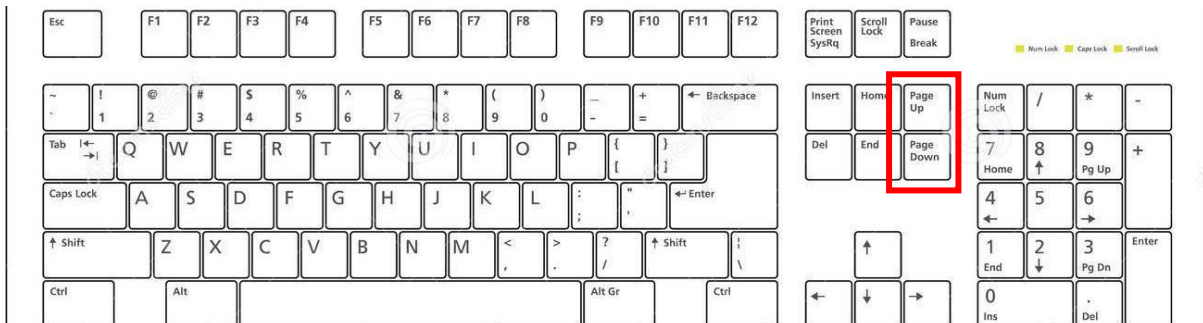
4. For auditory assistance, select **Read Aloud** from the toolbar.



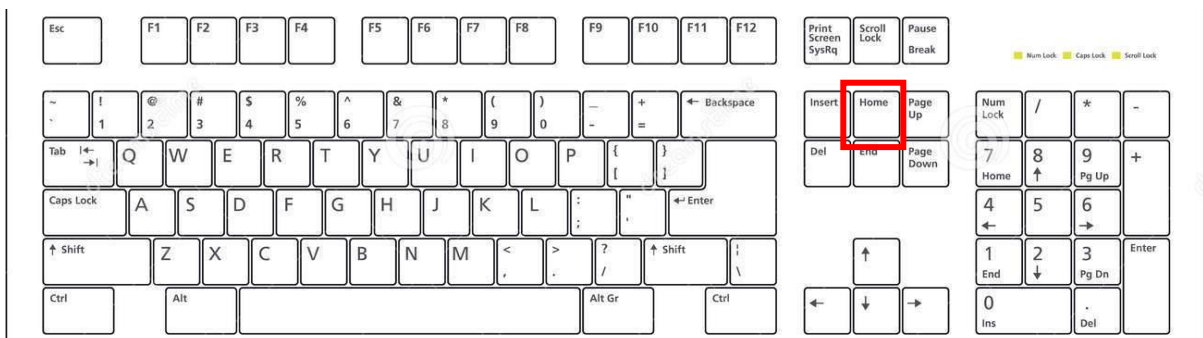
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to “jump” up and down a page.

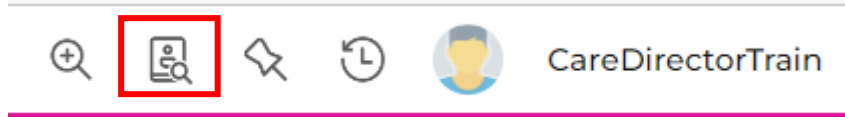


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## How to search for a Service User

1. Select the **Person Search** icon on the **Navigation Menu**



2. Enter their details provided. When finished, select **Search**.

3. Select from the list on the right-hand side. This will open their **Person Record**.

# How to search for a Case

1. Open the **Person Record** the **Case** is linked too. Then select the **Cases** tab to find the current **Case**.

Person: TEST Tom

TOM.TEST (Id: 444267) Person Record

Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Timeline Summary Profile **Cases** Services Document View All Activities

Filter By [dropdown]

From [calendar icon]

To [calendar icon]

Team [search icon]

Profession Type [search icon]

Reset Refresh Apply

OCT 2022

**Form (Case) Created** Yesterday at 15:05

A new record of form (case) was created by **Scott Simpson**.

Due Date: [blank] Form Type: AMHP Report Form Status: In Progress

**Service Provision Created** Yesterday at 10:12

A new record of service provision was created by **Scott Simpson**.

Actual Start Date: [blank] Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot Status: Draft

2. When found, select it to open the **Case Record**.

Person: TEST Tom

TOM.TEST (Id: 444267) Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Timeline Summary Profile **Cases** Services Document View All Activities

+ [icons] Cases

Related Records [dropdown] Search for records [search icon]

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Sc
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Sc

## How to find a Form (Case)

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.

The screenshot shows the CareDirector interface for a case record. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. The main content area shows a timeline of events:

- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'. Involvement Member: Community Occupational Therapy Service, Role: Occupational Therapist, Start Date: 21/09/2022.
- Case Involvement Created** (21/09/2022 12:17:20): A new record of case involvement was created by Scott Simpson.

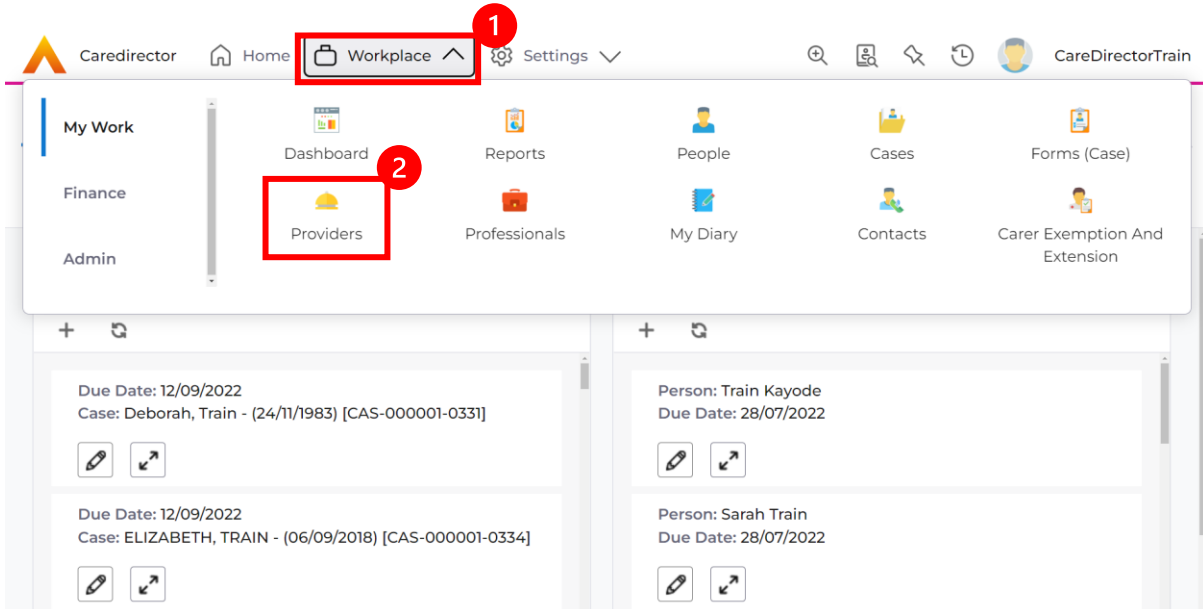
2. Select the relevant for **Form** to open.

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' section is active, showing a table of related records:

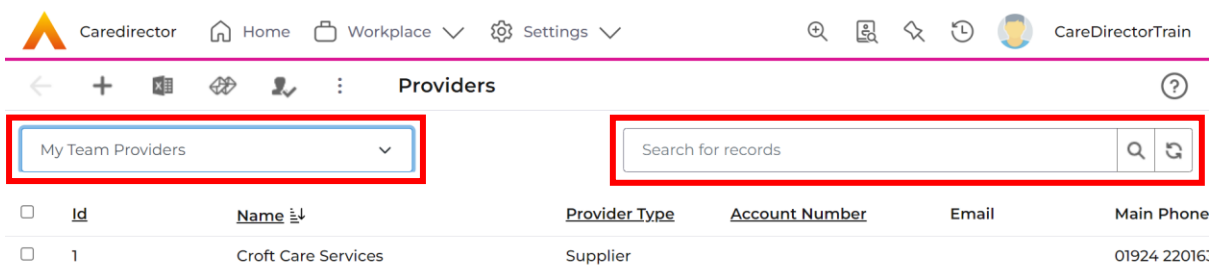
Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

## How to search for a Provider

1. Select **Workplace**, then **Provider**. This will open the **Provider Search Screen**.



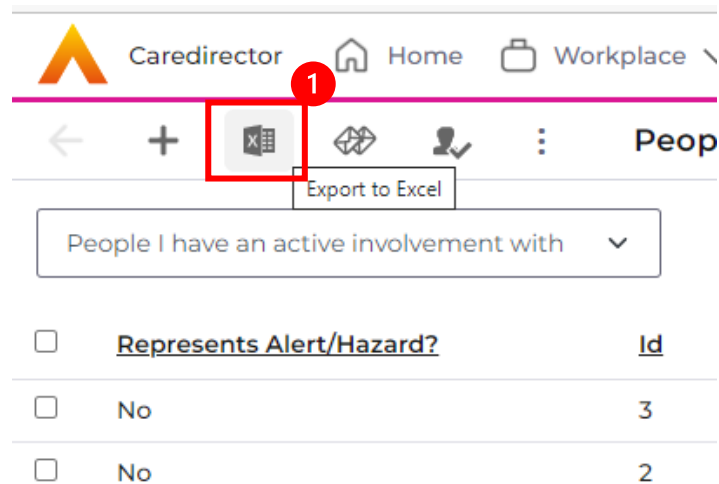
2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard \* for help during searches. When found, select the one you need.



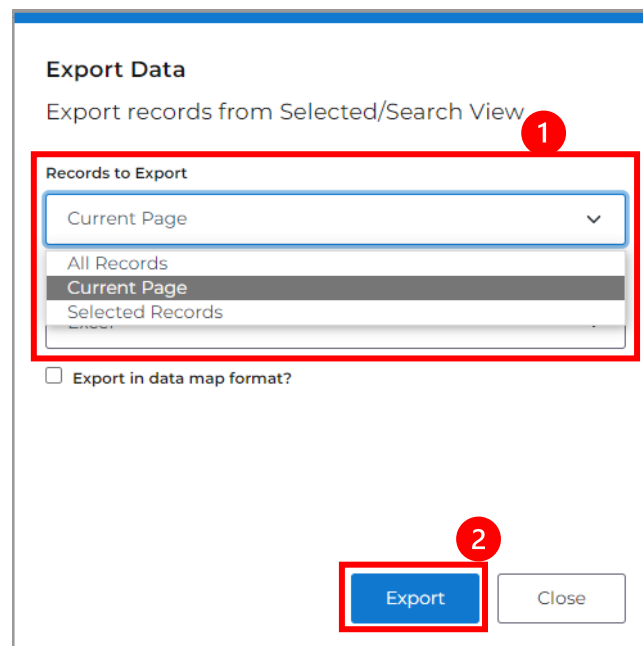


## Exporting to Excel

1. Available on the toolbar.



2. Use the **Records to Export** field to choose from **All Records** or **Current Page** or **Selected Records**.



3. **All Records** will export all records on the summary screen or record chosen.
4. **Current Page** will export all available records on the page chosen.
5. **Selected Records** are records that have been selected by the checkbox. Then only those selected will be exported.

A screenshot of a selection interface. At the top, there is a button labeled "Active Records". Below it, there are several rows, each with a checkbox and a label. The first row has a checkbox labeled "Title". The second row has an unchecked checkbox. The third row has a checked checkbox. The fourth row has a checked checkbox. The fifth row has an unchecked checkbox labeled "Mrs". The sixth row has an unchecked checkbox. The seventh row has an unchecked checkbox labeled "Miss".

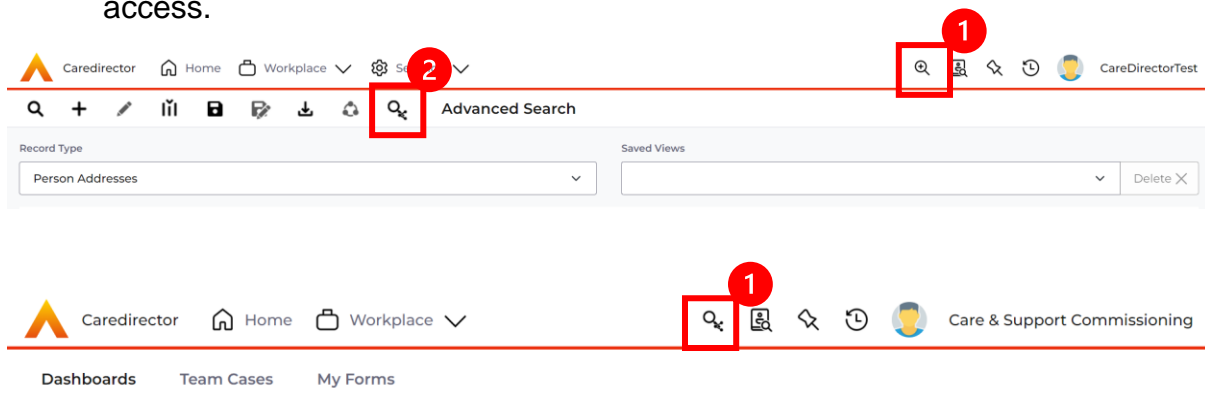
6. Select the **Excel Format** desired.

A screenshot of the "Export Data" dialog box. The title is "Export Data" and the subtitle is "Export records from Selected/Search View". There are two dropdown menus. The first is labeled "Records to Export" with a red circle containing the number "1" next to it, and its value is "Current Page". The second is labeled "Export Format" with a red circle containing the number "2" next to it, and its value is "Excel". Below the second dropdown, there is a list of options: "Excel" (highlighted) and "Csv (comma separated with quotes)". At the bottom right, there are two buttons: "Export" (highlighted with a red box and a red circle containing the number "3") and "Close".

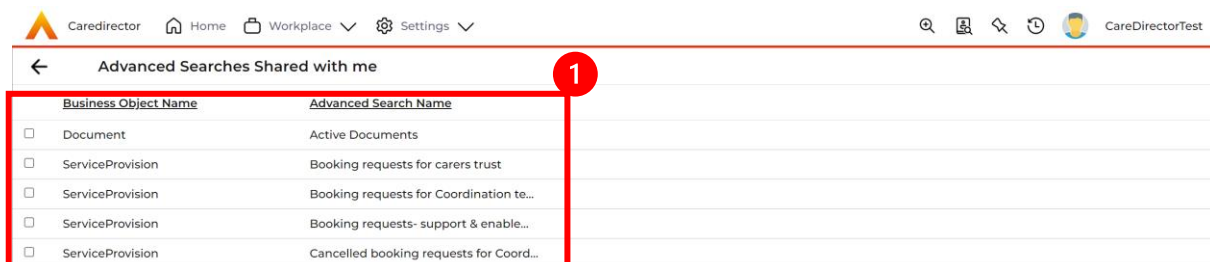
7. Select **Export** to export it to an excel sheet.

## How to use Advanced Search

1. Most **Advanced Searches** are available through your **Dashboards**. However, situationally there may be a reason to use the **Advanced Search** button on the **Navigation Menu**. You are not able to build your own, you can only choose from pre-built **Saved** ones.
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.

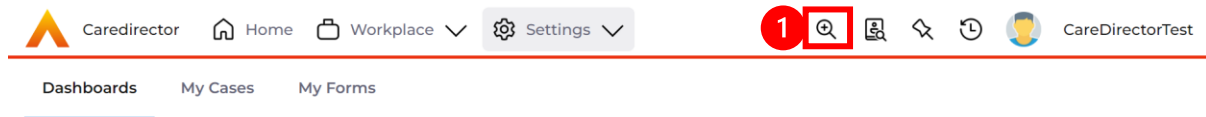


3. Select from the list to automatically search for the pre-built **advanced search**. If nothing is shared with you independently, tell your superuser.

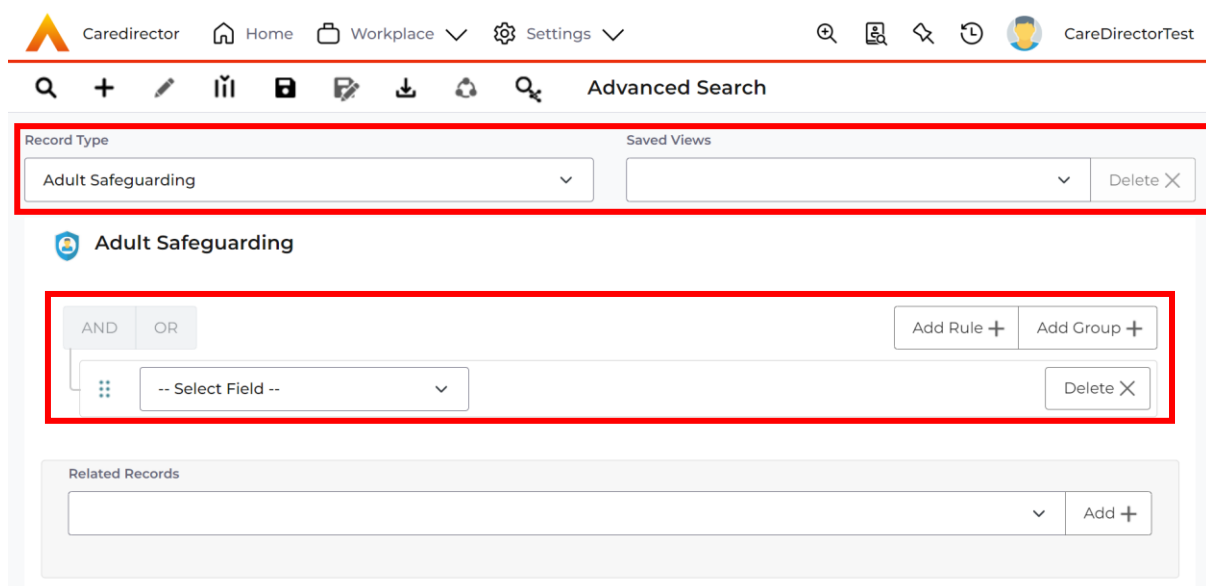


## How to create an Advanced Search

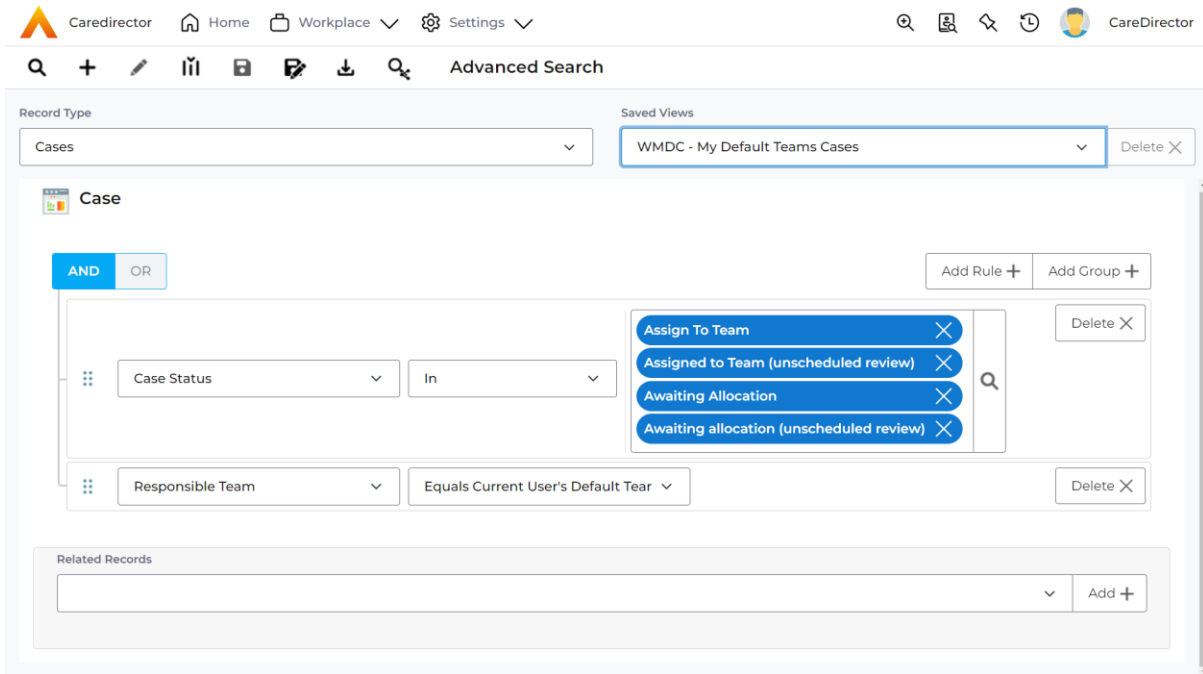
1. To create an **Advanced Search** that can be added as a **System View** or retrieve information for a **Report**. Select the **Advanced Search** icon on the **Navigation Menu**.



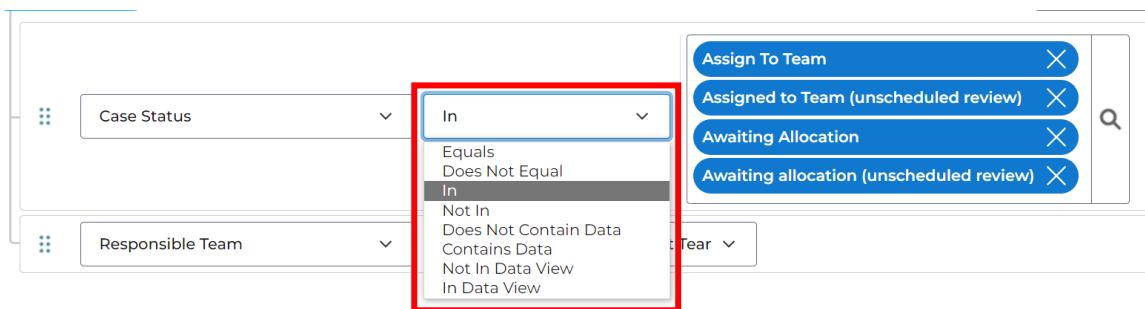
2. The first section is to apply the filters that you want the system to search upon.
  - a. **Record Type:** Is the base record where you want to retrieve that information from.
  - b. **Saved View:** Are those **Advanced Searches** that have been pre-built to a **Record Type**.
  - c. **Select Field:** Is the field/ parameter you want to search for information from.
  - d. **Add Rule:** Will add another **Select Field** to narrow down the search upon another criteria.
  - e. **Add Group:** Is applying another set of rules to the search that can apply the **And OR** statement of results.
  - f. **And OR:** Is the **and** include the second group/ rule. **or** chose the second **or** first group/ rule depending on result.
  - g. **Related Records:** Are anything that can be found in **Menu** of that **Record Type**.



- Therefore, build up the fields that you want to build a search result from. Here's an example.



- When selecting a **Field** to search under, the next box is the parameters you want to set how that **Field** is searched. **In** in this example, is searching for a **Case Status** that is **IN** the form of **Assign to Team, Assigned to Team (unscheduled review)** etc. Therefore, will only return results that is **IN** those set parameters.



- Alternatively, you can set one up that looks like this. This is a more complex search but can show you the potentials of filtering down information quite drastically.

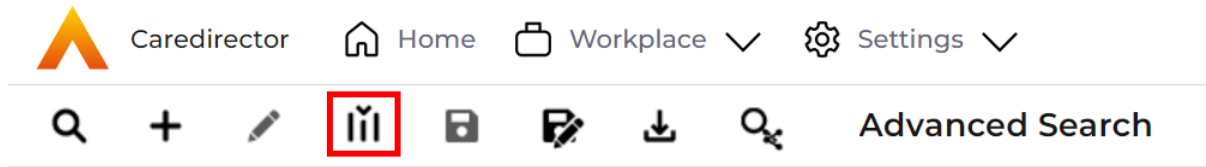
The screenshot shows the 'Advanced Search' interface in Caredirector. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main toolbar includes icons for search, add, edit, list, save, download, and refresh, with 'Advanced Search' text to the right. The search configuration is as follows:

- Record Type:** Providers
- Provider Section:**
  - Logic: AND
  - Rule 1: Postcode Starts With WF
  - Buttons: Add Rule +, Add Group +, Delete X
- Related Records:** Finance Transactions | Provider (Add +)
- Finance Transactions | Provider Section:**
  - Logic: AND
  - Rule 1: Cost of Services Is Greater Than 1000
  - Buttons: Add Rule +, Add Group +, Delete X
- Related Records:** (Empty, Add +)

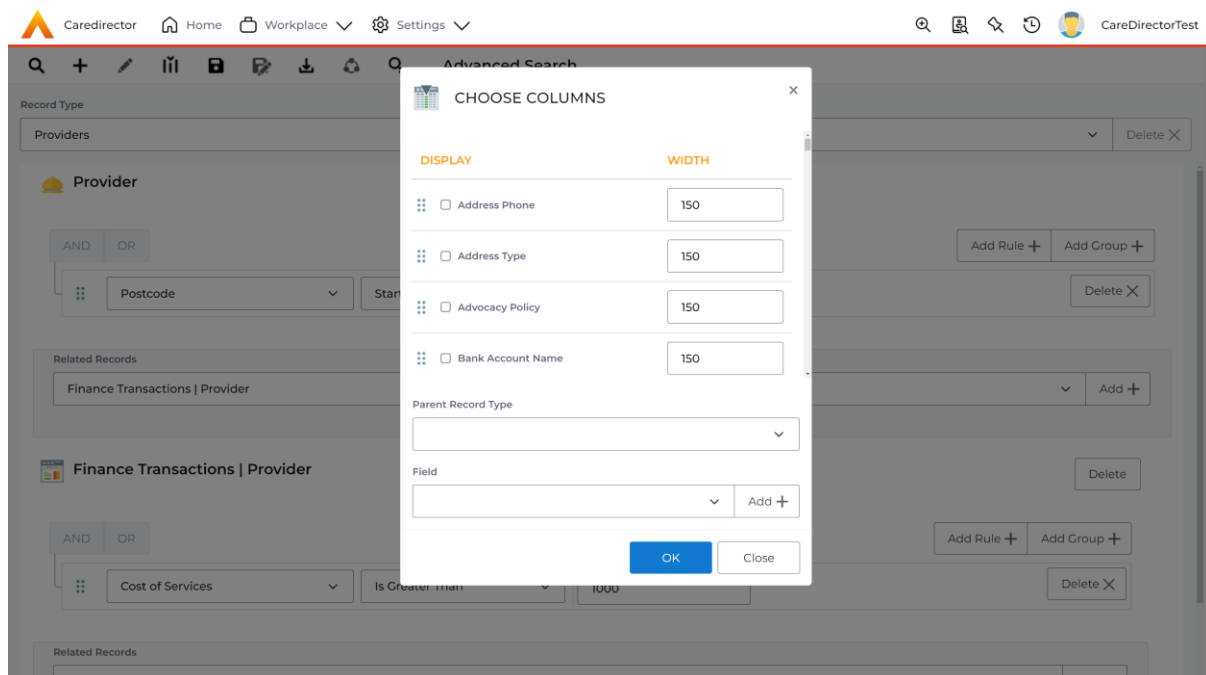
- There is the option to select **Search** from the toolbar, this will bring through a **Default** view of what you have searched for.

This close-up screenshot shows the top navigation and toolbar. The 'Search' icon (magnifying glass) is highlighted with a red square. The navigation items are 'Caredirector', 'Home', 'Workplace', and 'Settings'. The toolbar contains icons for search, add, edit, list, save, download, and refresh, followed by the text 'Advanced Search'.

7. However, there is a way to expand on that view more and specifically bring through any column heading that be relevant. This is by **Choose Columns** section on the toolbar.



8. This is an option to show the columns most suited to the search result. You would not want to do a search to find a person's name but have no column that pulls that information through. When selected it brings this window up. The **Display** is what the **Column Header** is. The **Width** is the pixel width of the displayed information.

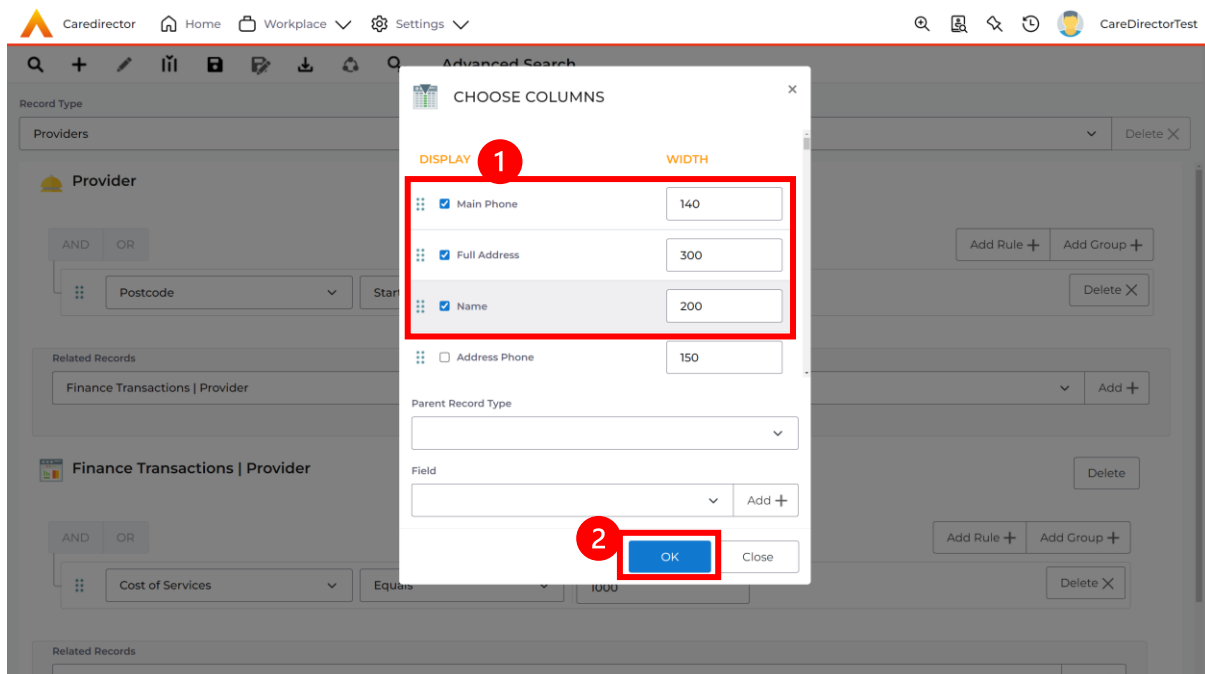


- a. Think of **width** as the width of the box needed to show the information without hovering over it. The smaller the number the smaller the box, the larger the number the longer the box.
- b. A mobile phone number is 11 digits long. Therefore, having a pixel width of **2,000** would be pointless. Instead, **140 width** is perfect.
- c. Think of pixel width as the size of the monitor. A 1080p monitor has the pixel height and width of 1920x1080. A 4k monitor has the pixel height

and width of 3840x1644. Therefore, having a **Width** of 1300 would mean that you would need to scroll across on a 1080p monitor to see the information but on a 4k monitor you would see it all.

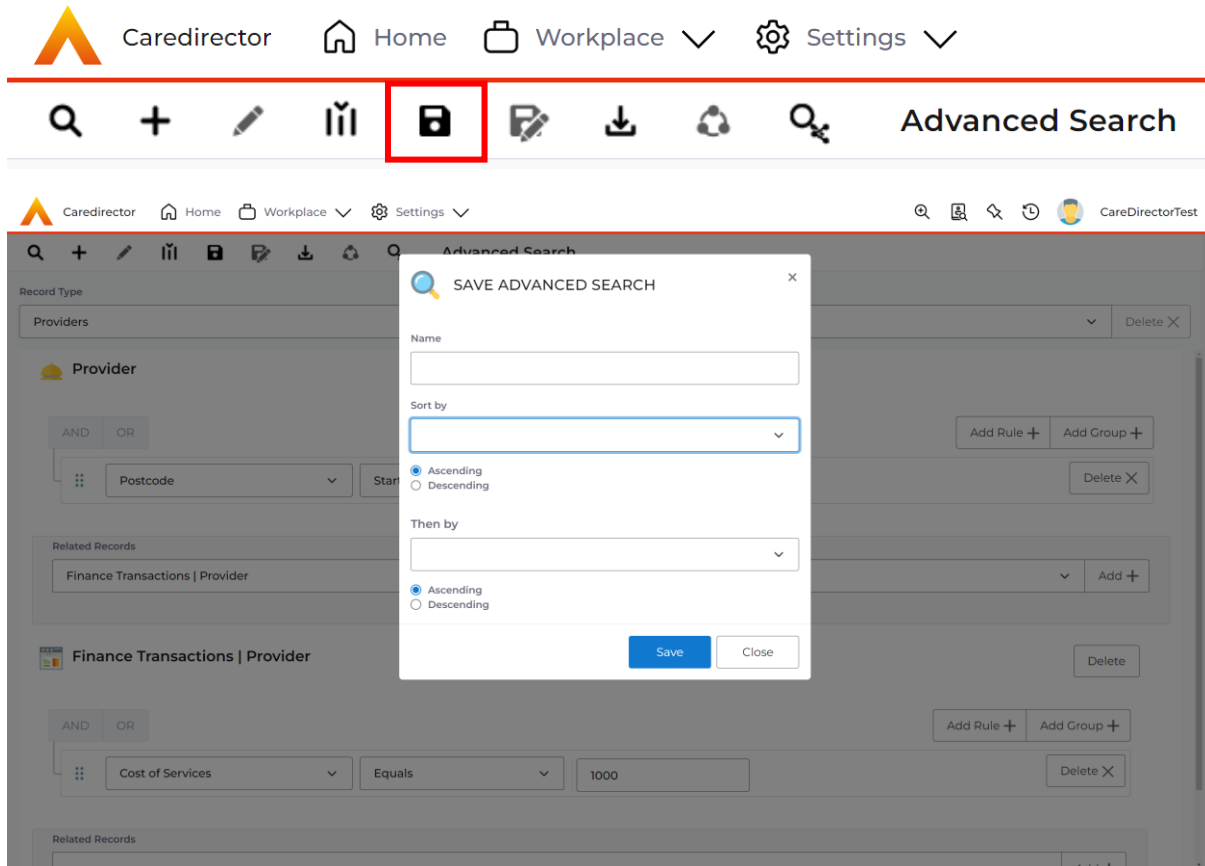
- d. Play around with **Width** not always do they need to be the **Perfect size** as if you hover your mouse over the wording then it will bring it up as a tooltip box. However, for Names/ Numbers/ other vital information is best to have fit in a better sized box where the System User doesn't not have to hover to see.

9. Once the checkboxes of the relevant information have been ticked and the **width** has been set (keep pressing ok with this and searching as this brings an update result). Press **OK**.





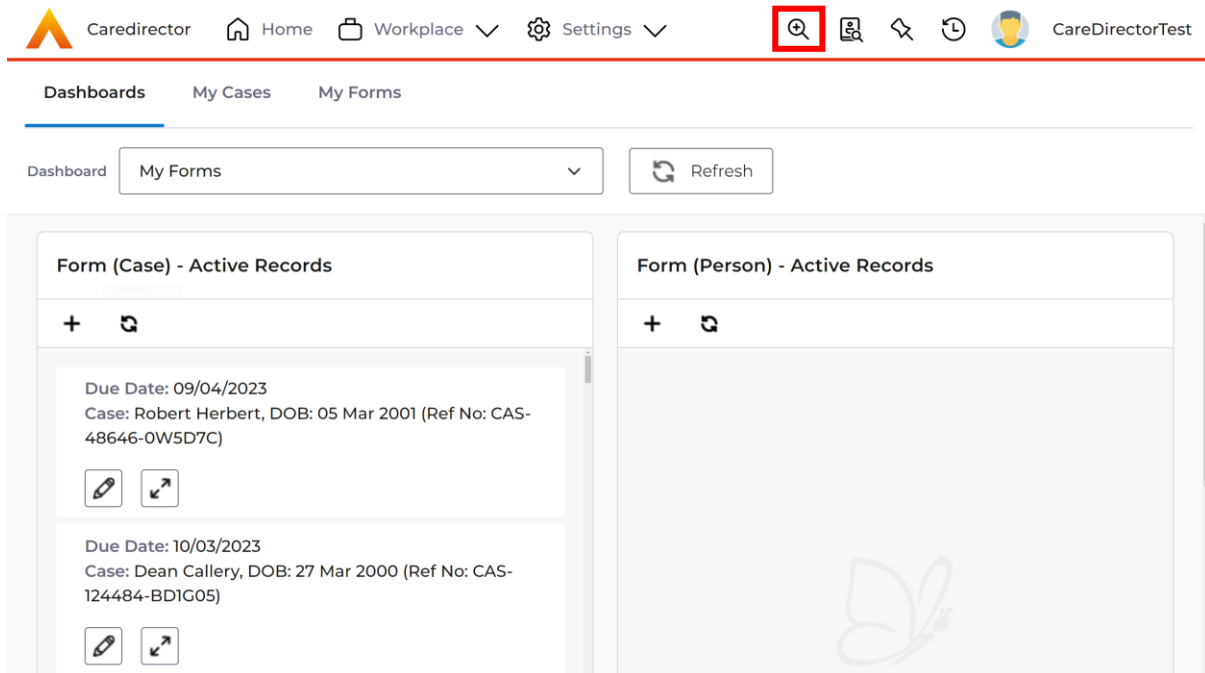
10. To **Save** this **Advanced Search** select the **Save** icon on the toolbar and fill out the required fields.



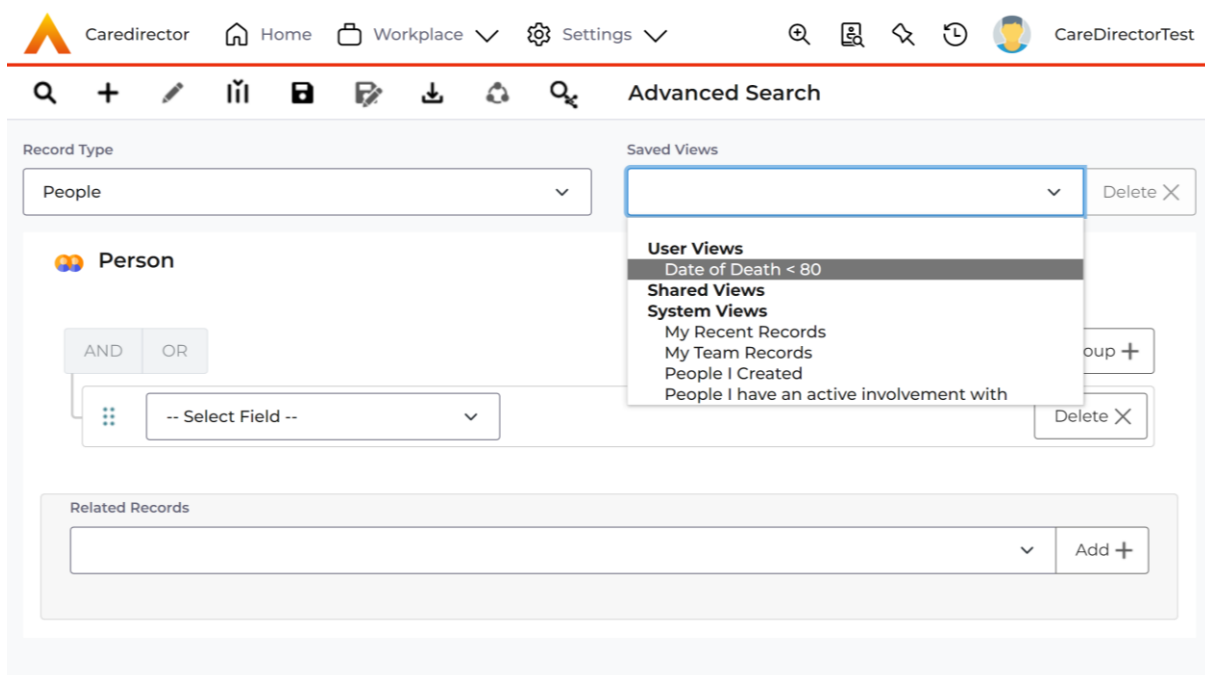
11. Give it an appropriate name and select the **default** sort by column in the **Sort By** field. **Then By** as the secondary and hit **Save**. Now this will be visible when searching for an **advanced search** under **Providers**.

## How to find your Advanced Searches

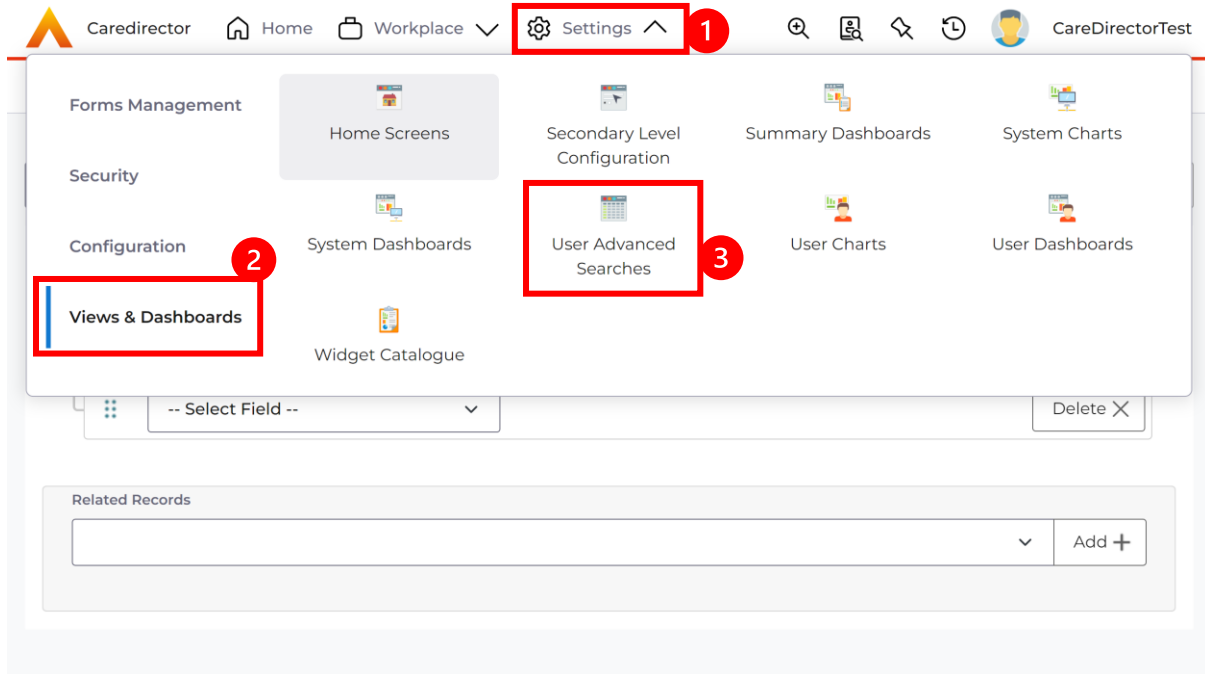
1. There are two ways to find your advanced search, the first way is through **Advanced Search** on the **Navigation Menu**.



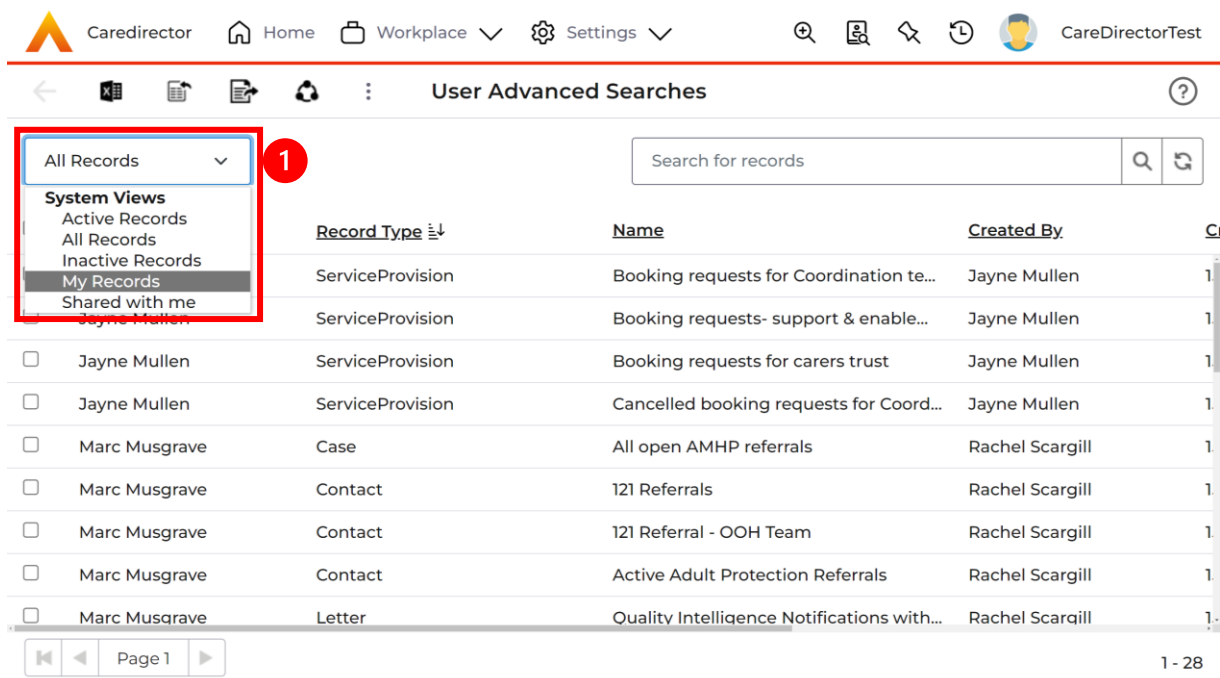
2. Select the **Record Type** and then the **Saved View** will show any **User Views** that have been created by the System User.



3. The second way is by the **Settings** menu. **Settings** then select **Views & Dashboard** and then **User Advanced Searches**.

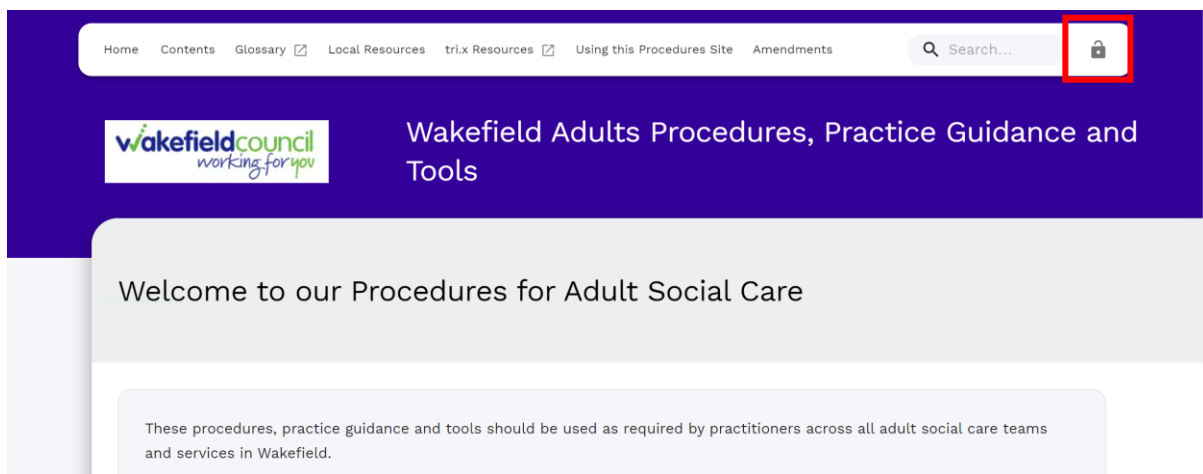


4. Use the different **System Views** to show **My Records**.

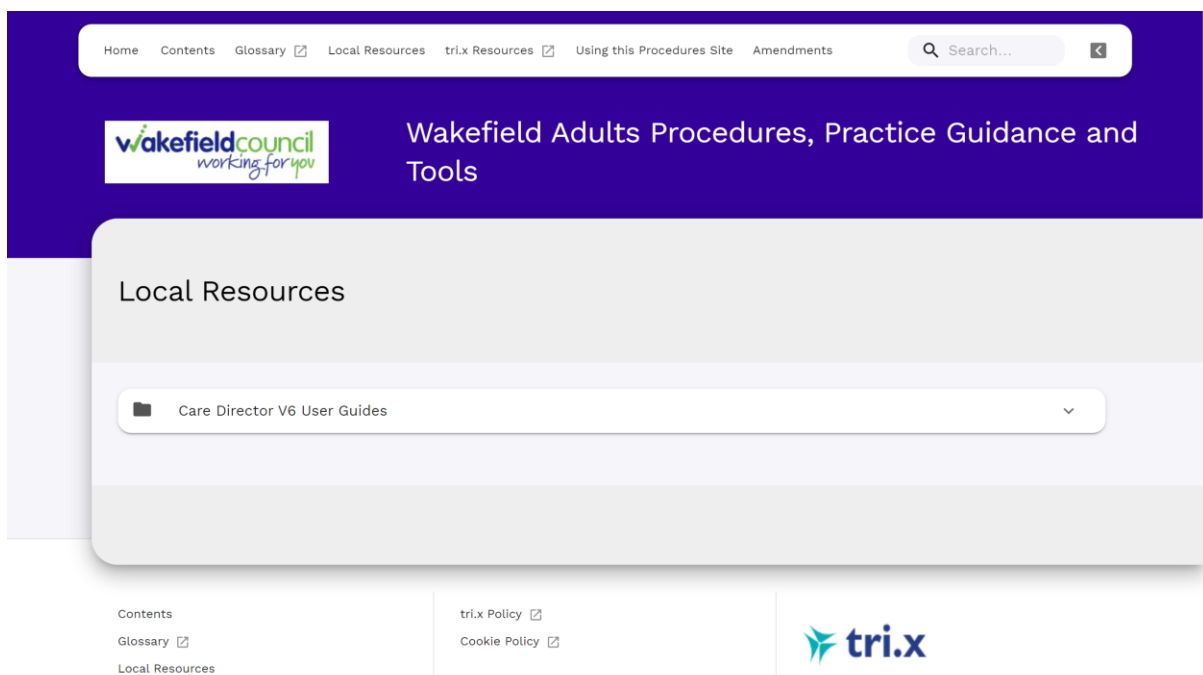


## Further CareDirector Guidance

1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.
2. Go to **Microsoft Edge** and copy and paste this URL:
  - a. <https://wakefieldadults.proceduresonline.antser.com/>
3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



**Version Control**

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	01/11/2022