

# Synergy Reports using Tableau for Children's Centres

Revision II



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# Key Performance Indicators (KPI)

There are several methods of measuring the footfall at Children Centres'.

KPI	Description
Reach	Number of individual people who have attended a CC.
Volume	Number of times individual people have attended.
%>=3	Percentage of individual people who have attended three or more times.

Abbreviation	Description
CC	Children Centre.
KPI	Key Performance Indicator.
IP	Individual People.

# About CCNas V1.2

This resource guide has been developed to help you when generating Synergy reports. The list below shows the types of reports, along with a brief description. Continue with this resource guide to learn how to view and work with reports.

Dashboard tabs	Description
Overview	Table showing reach/volume and %>=3 per centre.
Cluster & Centre	Chart showing reach/volume and %>=3 per centre.
Ethnicity & Gender	Chart and Table showing all ages % reach by ethnicity and gender (defaults to 0-4 age group).
Reach and Volume by ethnicity	Full ethnicity breakdown of children and parents/carers accessing Children Centres.
Project Reach and Volume by Cluster, Children 0-4	Table showing reach by Cluster for children aged 0-4 by project type.

# About CCNas V1.2

Dashboard tabs	Description
Project Reach and Volume by Centre, Children 0-4	Table showing reach by Centre for children aged 0-4 by project type.
Project reach and volume, Parent/carer	Table showing reach by Cluster & Centre for parent/carers (aged 17+) by project type.
Attended Cluster vs Home Cluster (iCluster)	Table showing the number of Children & Parent/Carers accessing in each Cluster in accordance to the Cluster where they live.
Individuals	Individual attendance data.

# Please Read & Review before Proceeding

- ✓ Children's Centres will have viewing rights only to specific reports•
- ✓ Each Children's Centre will be issued with one license only (1 license per centre) centres will be recharged for the cost of the license
- ✓ Emails such as password resets are sent to the email address that the license is set up with.
- ✓ Centres are welcome to purchase further licences
- ✓ Data feeding into the dashboards will be refreshed from Synergy every 24 hours. ( subject to review)
- ✓ Data must be entered into Synergy within 2 weeks of an event taking place - if the data is not entered within 2 weeks it will not show in Tableau until the end of quarter

# Please Read & Review ‘Tableau Reports’

Tableau reports are continuously under development; consequently, you may occasionally notice new and updated features, such as additional tabs, filters, and information. We shall keep you updated with such changes.

Ultimately we aim to produce a set of even more helpful and comprehensive reports.

We appreciate your cooperation and patience while we continue through this development phase.

*THANK YOU!*

# Topics

1. Getting Started & Log in
2. The Tableau Home Screen
3. Tableau Favourites & Views
4. Tableau Dashboards & Reports
5. Useful Toolbar options
6. Where to get help

# Getting Started and Login



# Logging into Synergy Reports using Tableau

- Use the following link to access the Synergy reports then type your username and password.

1

<https://prod-uk-a.online.tableau.com/#/site/misa/home>

Username

2

Firstname.surname@hackney.gov.uk

Password

3

\*\*\*\*\*

Login with your work email. Create a password

# Tableau - Getting logged in

 **tableau**

Sign in to Tableau Cloud

Email address

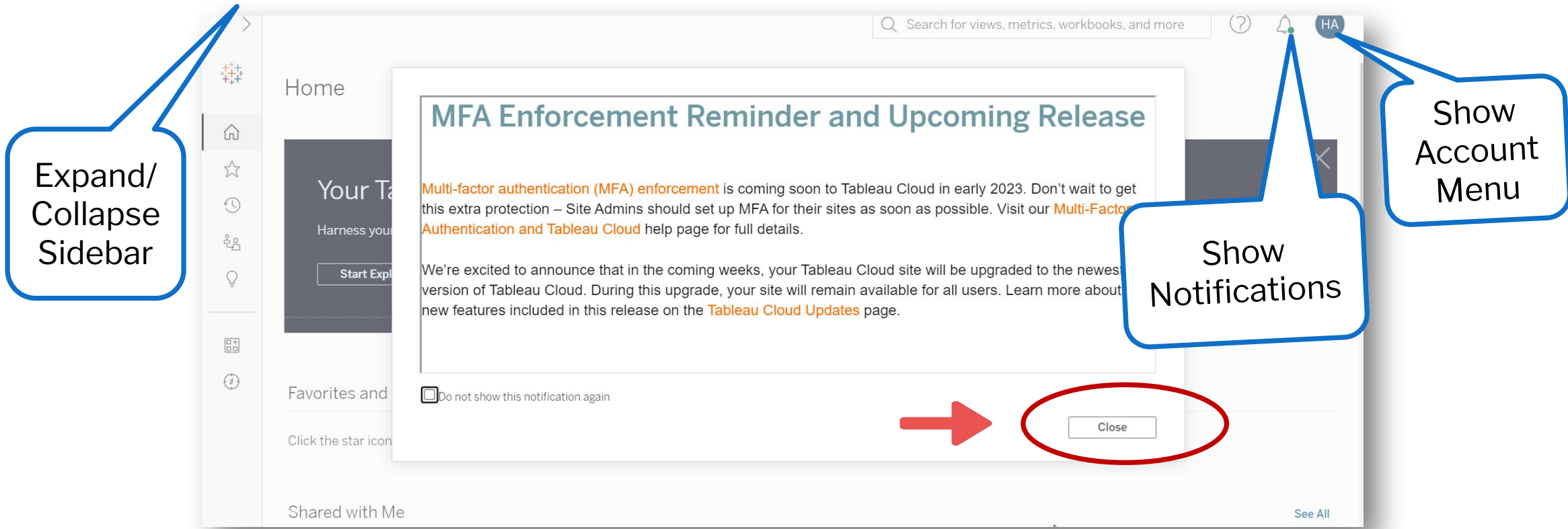
Password

Remember me [Forgot password](#)

Use the email address provided to the MISA team

# Tableau Home Screen

- Acknowledge the MFA Enforcement Reminder and Upcoming Release – Click Close to close reminder window.



# The Tableau Home Screen

# Tableau Home Screen Popular Buttons & Options

The image shows a screenshot of the Tableau Home Screen with several callouts pointing to specific UI elements:

- Expand/Collapse Sidebar:** Points to the sidebar toggle icon (a square with four plus signs) in the top left corner.
- Search for Content type:** Points to the search bar at the top of the page.
- Show Help Menu:** Points to the question mark icon in the top right corner.
- Show Notifications:** Points to the bell icon in the top right corner.
- Show Account Menu:** Points to the user profile icon (labeled 'HA') in the top right corner.
- Note: Click X to close the Banner:** Points to the close button (an 'X' icon) on the Tableau Banner.
- Tableau Banner:** Points to the main banner area featuring a chart and the text "Your Tableau site—where analytics and your organization meet".

A red speech bubble icon with three dots is located in the bottom left corner. A yellow highlighted box at the bottom left contains the text: **Note: menu options may vary**.



# The Tableau Reporting Home Screen

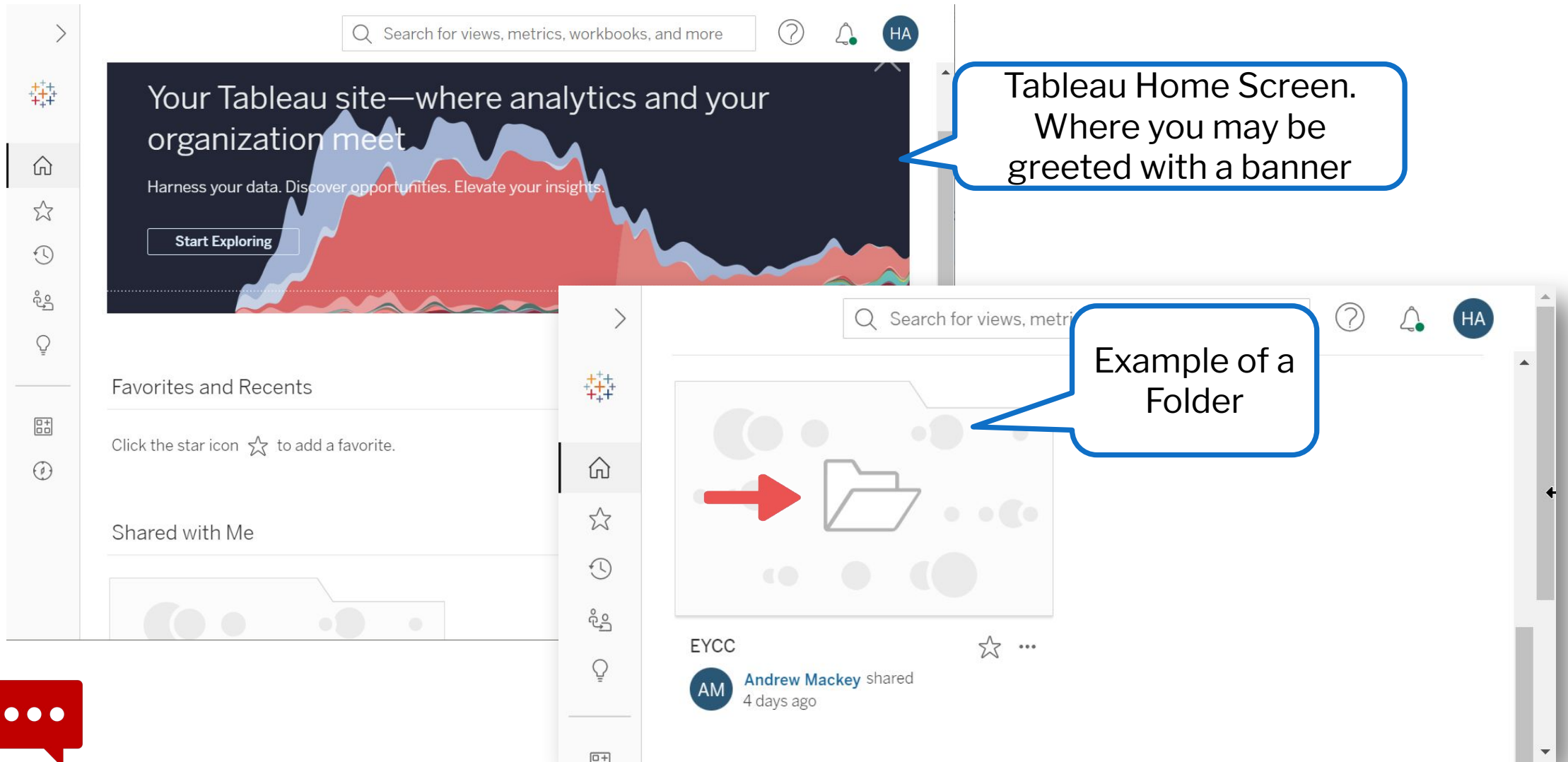


Tableau Home Screen. Where you may be greeted with a banner

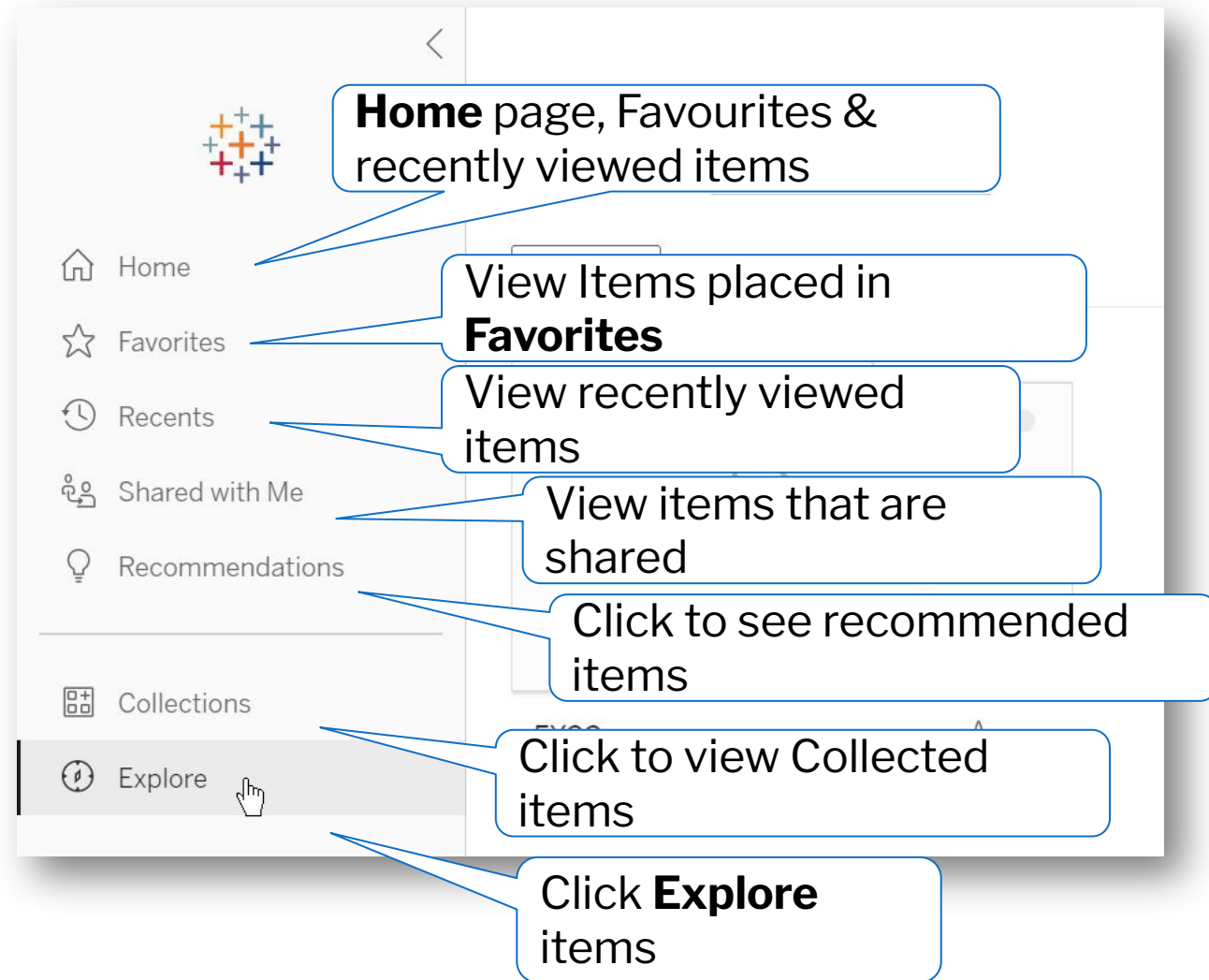
Example of a Folder



**Note:** menu options may vary

# Getting Started & using the Explore menu bar option

- Click **options** from the menu option.
- Click the **Explore** option in the Sidebar panel.



**Note:** menu options may vary



# Tableau Favourites & Views

# Saving to Favourites

- From the Home screen locate a dashboard then click the **Favorites** ★ button beneath the dashboard.
- From the panel on the left click the **Favorites** folder to locate and view the dashboard.



**Note:** menu options may vary

1

Click to add a dashboard to the favorites folder

2

Contents

- Overview
- Cluster & Centre
- Ethnicity & Gender
- Reach and Volume by ethnicity
- Project Reach and Volume by Cluster, Children 0-4

Index 5 minutes ago

★ ...

Select All Content Type: All Sort By: Custom

★ Favorites

Recents

Shared with Me

Recommendations

Collections

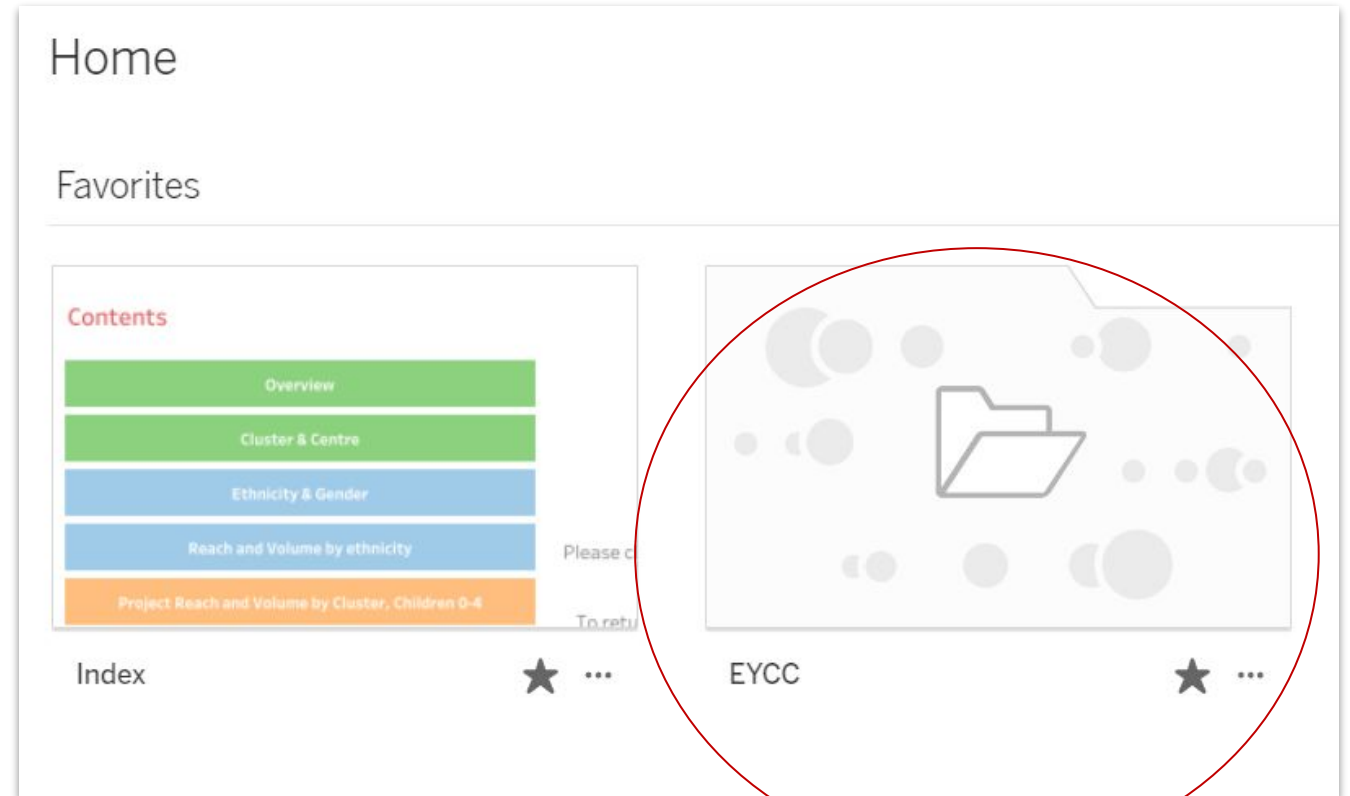
Explore

# Opening the Workbook

- There will be several workbooks available.

CURRENT. **CC Dashboard v1.2.4**  
LEGACY. **EYCC Dashboard**  
CURRENT. **CC Data Quality v1.0.0**

- Click to open the **EYCC** folder



**Note:** You will be able to access the main reports for all Centres

# Opening the Workbook

- Workbooks inside the EYCC folder are now visible, click the **Current CC Dashboard**.

Explore / EYCC

EYCC ★ ⓘ ...  
Owner Andrew Mackey

New ▾ Select All

Search for views, metrics

Content Type: All

**Contents**

- Overview
- Cluster & Centre
- Ethnicity & Gender
- Reach and Volume by ethnicity
- Project Reach and Volume by Cluster, Children 0-4

**Age 0-5, Reach and Volume**

	2020		2021	
	Reach	Volume	Reach	Volume
Walsley	198	1,136	115	7,034
One O'Clock	940	5,042	4	30
Woodbury	1,764	7,872	1,609	19,721
<b>Total</b>	<b>2,579</b>	<b>14,850</b>	<b>1,708</b>	<b>26,785</b>
Farnbank	290	2,088	68	788
Hean	579	4,830	493	8,368
Lakeforth	1,443	8,092	1,220	11,026
Oshby	1,814	8,251	1,363	31,805
<b>Total</b>	<b>6,516</b>	<b>25,261</b>	<b>2,722</b>	<b>51,982</b>
Brown	84	341		
Comberton	371	1,697	80	3,448
London	1,857	10,480	882	8,264
<b>Total</b>	<b>2,662</b>	<b>12,518</b>	<b>742</b>	<b>6,492</b>
Claxton	596	3,135	271	2,471
Daubney	1,032	6,439	362	2,746
Barnborough	353	3,419	180	1,040
Milfields	585	3,838	72	270
Blackburn	881	4,733	404	9,854

**CURRENT - CC Dashboard v1...** ☆ ...

**CURRENT - CC Data Quality v1...** ☆ ...

**LEGACY - EYCC Dashboard** ☆ ...

Click to open a dashboard, for this example choose the Current CC Dashboard.

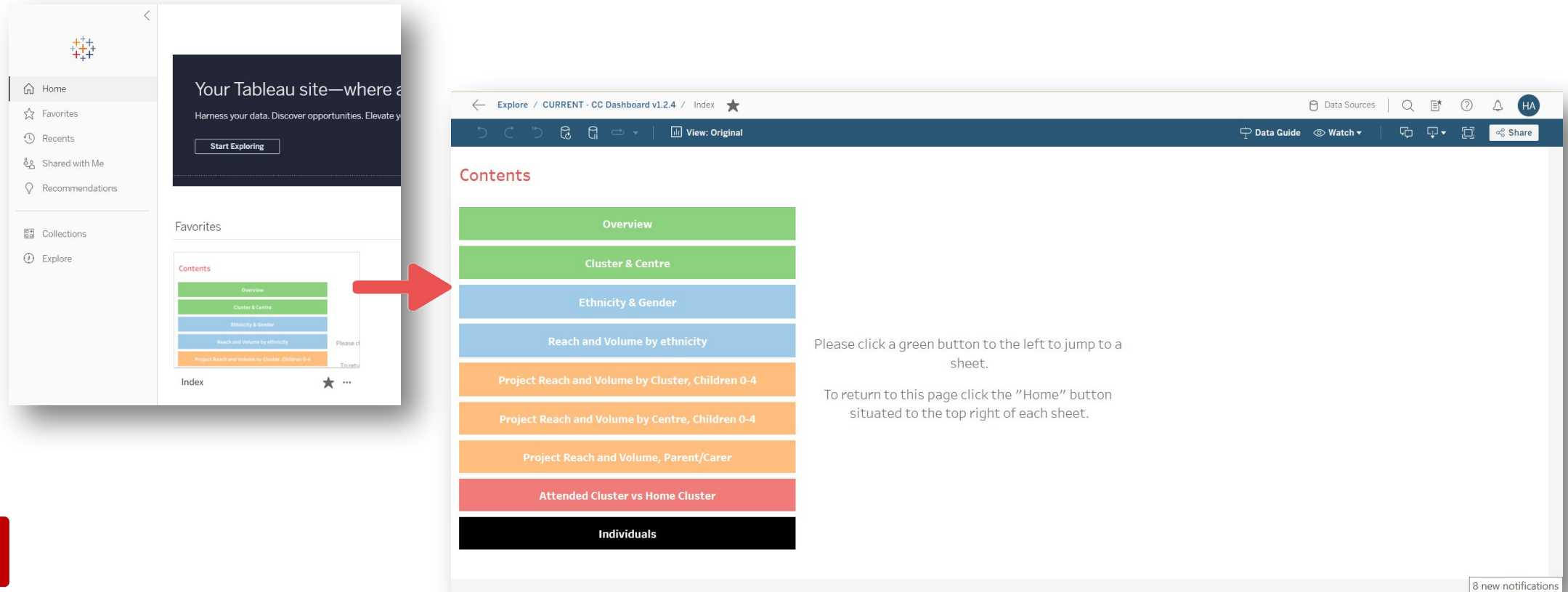


**Note:** You will be able to access the main reports for all Centres

# Tableau Dashboards & Reports

# Dashboards with Reports for Centres

- Dashboard and reports will appear here. (Note this area is being developed to show additional reports).



The image displays two screenshots of the Tableau interface. The left screenshot shows the Tableau home page with a sidebar menu and a 'Your Tableau site' banner. A red arrow points from a 'Contents' menu in the 'Favorites' section to the right screenshot. The right screenshot shows a detailed view of the 'Contents' menu for a dashboard titled 'CURRENT - CC Dashboard v1.2.4'. The menu items are: Overview (green), Cluster & Centre (green), Ethnicity & Gender (blue), Reach and Volume by ethnicity (blue), Project Reach and Volume by Cluster, Children 0-4 (orange), Project Reach and Volume by Centre, Children 0-4 (orange), Project Reach and Volume, Parent/Carer (orange), Attended Cluster vs Home Cluster (red), and Individuals (black). A red speech bubble icon is located at the bottom left of the image.

Please click a green button to the left to jump to a sheet.

To return to this page click the "Home" button situated to the top right of each sheet.

**Note:** Reports data is updated on a nightly basis, with data being held 2 weeks prior to the update...

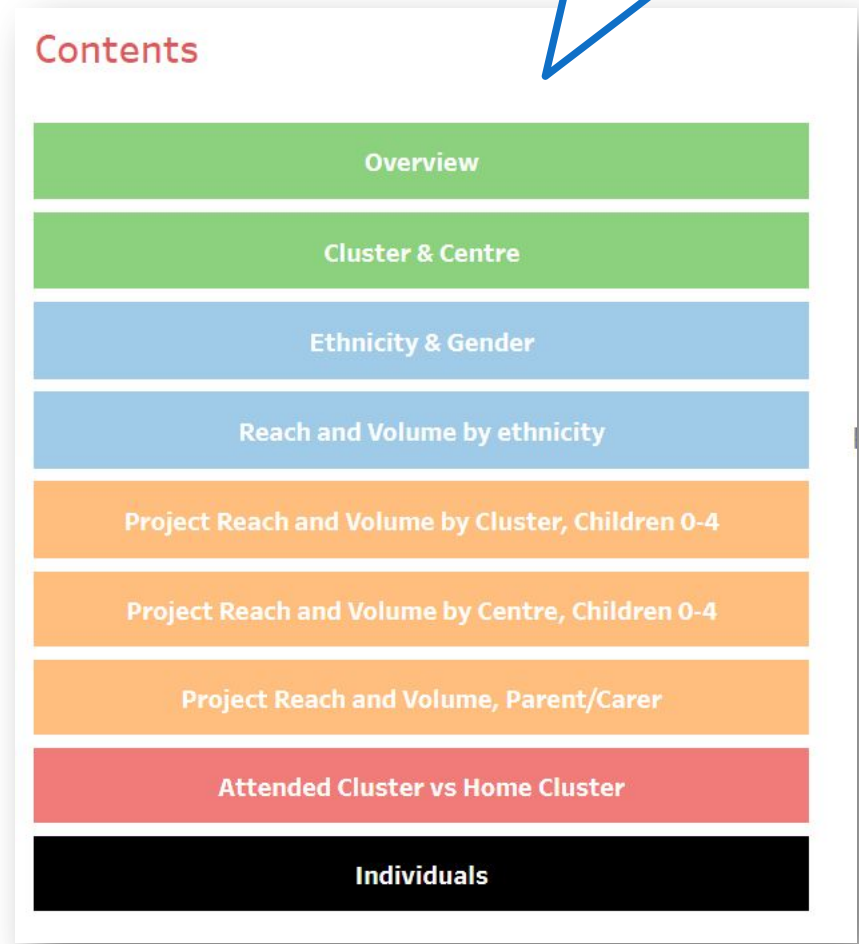
# Accessing the Synergy Index Report

There are a variety of different reports. The following report type is available across all centres.



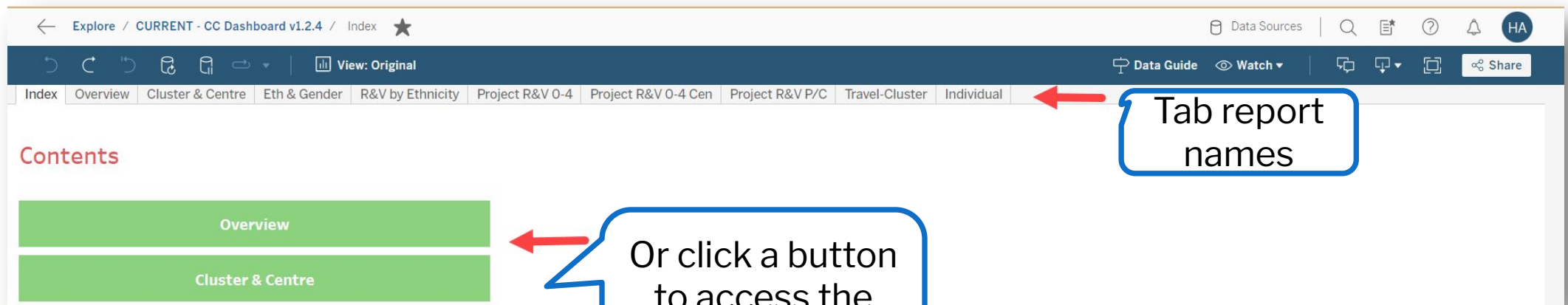
- Beneath Contents each horizontal bar represents a report type.
- Click a report i.e. Overview to review the content

Each bar represents a report



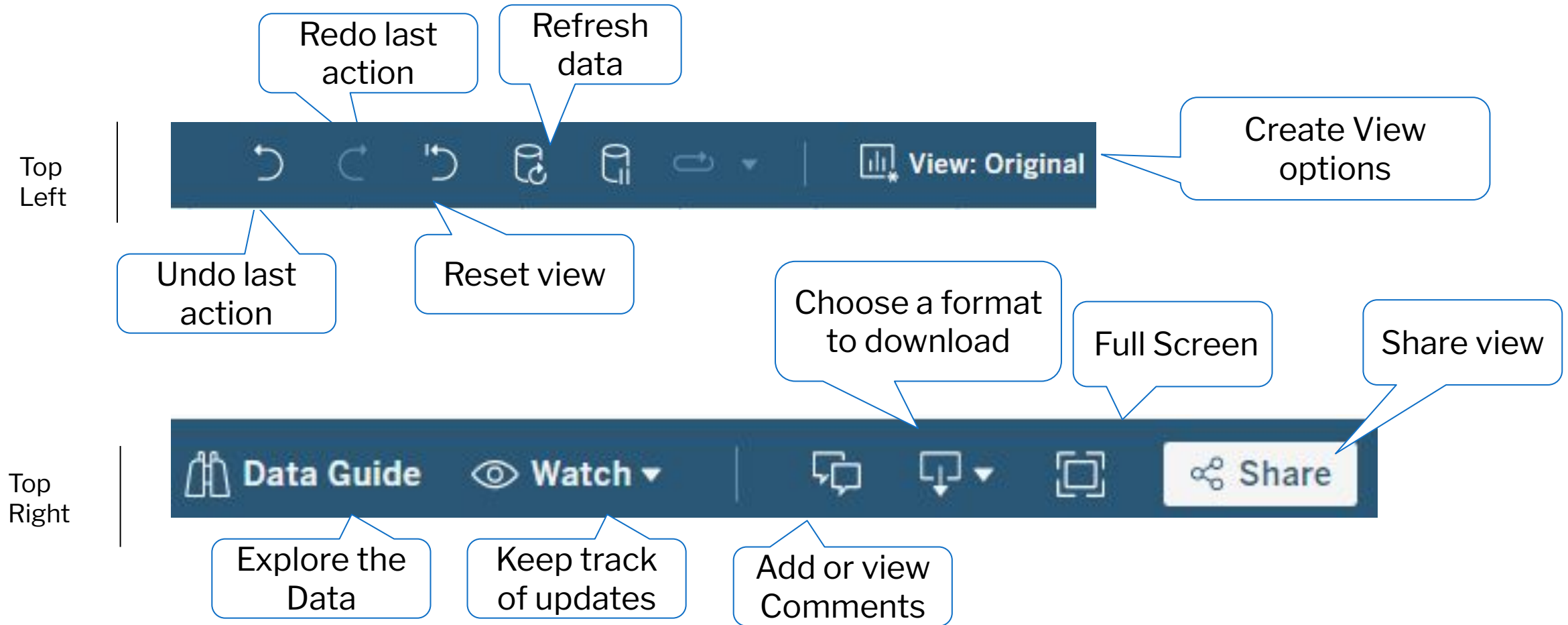
# Toolbar Options

- Toolbar buttons and menu options appear at the top of the screen as well as  
The toolbar is where you can find different reports that can be downloaded as well as edited.
- Click a button beneath the Contents label or click a horizontal tab report name





# Useful Toolbar Options



**Note:** Some options may appear dimmed, this means the option is not available or inactive until you carry out a specific function

# Drilling for Specific Information in a Report

- Click either a button from the Index column, or a menu option from the horizontal menu at the top to open a report.

Contents

1

- Overview
- Cluster & Centre
- Ethnicity & Gender
- Reach and Volume by ethnicity
- Project Reach and Volume by Cluster, Children 0-4
- Project Reach and Volume by Centre, Children 0-4
- Project Reach and Volume, Parent/Carer
- Attended Cluster vs Home Cluster
- Individuals

2

## Overview

Fi Year End 
Act Start

Home
Centre 
Project 
Month of Act Start 
Event Type 
Age Group 
CC Cluster 
LSOA 
PostCode

### Reach, Volume and Percentage Attending more than 3 times (%>=3)

CC Cluster	Centre	Fi Year End								
		2021			2022			2023		
		Reach	Volume	Vol_%>=3	Reach	Volume	Vol_%>=3	Reach	Volume	Vol_%>=3
A	Hillside	115	7,034	70%	181	1,597	65%	182	493	37%
	One O'Clock	4	30	75%	465	1,674	33%	451	1,796	35%
	Woodbery	1,689	19,721	29%	1,291	9,099	28%	1,066	3,121	24%

26

# Drilling for Specific Information in a Report – continued.

- Use the drop down arrows alongside column headings to filter data.

Click, hold and drag to set a date range

**Overview**

Fi Year End (Multiple values) Act Start 1/1/2019 12:00:00 AM 11/22/2022 10:00:00 AM

Home Centre (All) Project (All) Month of Act Start (All) Event Type (All) Age Group 0-4 CC Cluster (Multiple values) LSOA PostCode

Reach, Volume and Percentage Attending more than 3 times (%>=3)

CC Cluster	Centre	Vol_%>=3	Fi Year End 2022			2023		
			Reach	Volume	Vol_%>=3	Reach	Volume	Vol_%>=3
A	Hillside	70%	181	1,597	65%	182	493	37%
	One O'Clock	75%	465	1,674	83%	451	1,796	35%
	Woodbery	29%	1,291	9,099		3,121		24%

Filter Options

Data results

# The 'Overview' Dashboard & Filtering

There are a variety of reports to choose from. You can choose a report by clicking on a tab at the top of the screen:

The screenshot shows the 'Overview' dashboard with a navigation bar at the top containing tabs: Index, Overview, Cluster & Centre, Eth & Gender, R&V by Ethnicity, Project R&V 0-4, Project R&V 0-4 Cen, Project R&V P/C, Travel-Cluster, and Individual. The 'Overview' tab is selected.

Below the navigation bar, there are several filter controls: 'Fi Year End' (Multiple values), 'Act Start' (1/1/2019 12:00:00 AM), and a 'Home' button. There are also dropdown menus for 'Centre' (All), 'Project' (All), and 'Month of Act Start' (All). The 'Event Type' dropdown menu is open, showing a list of event types with checkboxes: (All), Case Note, Email, Meeting Record, Phone Call, Session Event, Text Message, and Visit. A red circle highlights the dropdown arrow, and a blue callout box points to it with the text: 'Click the drop down arrow to apply a filter. Selected checkboxes means all data is selected. Click a checkbox to deselect.'

The main data table is titled 'Reach, Volume and Percentage Attending more than 3 times'. It has columns for CC Cluster, Centre, Reach, Volume, Vol\_%>=3, and Age Group. The data is organized by CC Cluster (A and B) and Centre (Hillside, One O'Clock, Woodbery, Fernbank). The table shows the following data:

CC Cluster	Centre	Reach	Volume	Vol_%>=3	Age Group
A	Hillside	115	7,034	70%	65%
	One O'Clock	4	30	75%	33%
	Woodbery	1,689	19,721	29%	28%
	Total	1,708	26,785	33%	36%
B	Fernbank	88	786	75%	70%


- In the above example the **Overview** option is selected. Click a filter arrow alongside a field names to filter data by clicking checkboxes to select data, repeat to unselect.

# Useful Toolbar Options



# Useful Toolbar Options

Choose options to add comments, download files, use full screen and share a report with others.



Click to open the **Comments panel** and add a comment in the **Add a comment field**. Click again to close the panel

Click to view the report in Full Screen. Press Esc to exit Full Screen

Click to choose a format to download, you can select from *Image, Data, Crosstab, PDF & PowerPoint*

Click to open the **Share View** window, then type names of who you wish to share the file with. In addition, click the **Copy Link** button to share a link with others in perhaps an email message

# Downloading Data into a Spreadsheet

To download data into a spreadsheet, click to choose a format to download button, then click **Crosstab**. From the Download Crosstab window choose a format Excel or CSV then click download. Your file is downloaded in the selected application.

1

2

3

4

5

6

7

Opened downloaded file in Excel format

		FI Year End								
		2021			2022			2023		
CC Cluster	Centre	Reach	Volume	Vol_%>=3	Reach	Volume	Vol_%>=3	Reach	Volume	Vol_%>=3
A	Hillside	115	7,034	70%	181	1,597	65%	182	493	37%
	One O'Cloc	4	30	75%	465	1,674	33%	451	1,796	35%
	Woodbery	1,689	19,721	29%	1,291	9,099	28%	1,066	3,121	24%
	Total	1,708	26,785	33%	1,756	12,370	36%	1,537	5,410	31%
B	Fernbank	88	786	75%	132	854	70%	168	902	70%
	Ihsan	450	8,365	78%	428	2,724	66%	364	1,419	36%
	Lubavitch	1,220	11,026	48%	1,017	9,303	53%	688	6,536	50%
	Oldhill	1,363	31,805	41%	1,301	13,029	31%	691	2,734	31%
	Total	2,722	51,982	57%	2,594	25,910	51%	1,770	11,591	45%
C	Brook				53	120	26%	77	206	34%
	Comberton	92	1,443	100%	129	361	28%	135	209	10%
	Linden	662	5,054	39%	880	3,878	38%	740	2,846	29%

# Where to get help



**Support:** [gemma.vare@hackney.gov.uk](mailto:gemma.vare@hackney.gov.uk)

**Technical support:** [andrew.mackey@hackney.gov.uk](mailto:andrew.mackey@hackney.gov.uk)  
[anastasia.delchanidou@hackney.gov.uk](mailto:anastasia.delchanidou@hackney.gov.uk)