

ChildWare

Using Advanced Filters

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The Advanced Filter option can be found on the following lists: [Children](#), [Caregiver](#), [Application](#), and [Staff](#).

Setting Up an Advanced Filter

Advanced Filters allows you to filter a large list into a smaller list by choosing key words.

The “Field” for the filter search varies depending on which list you navigated to in ChildWare.

EX: Child List

Advanced Filter

Add Grouping Tools

Current Query

Field: ChildID
Operator: =
Value:

ChildID
ChildID
FirstName
LastName
Age
DOB
Agency

Search Close

Whereas, the Application List has additional fields:

Advanced Filter

Add Grouping Tools

Current Search

Field: Site
Operator: =
Value:

Child ID
First Name
Last Name
Date of Birth
Referral Date
Site
Agency
Status
Age
Enrollment Date
Discharge Date

Search Close

9097	4	ABC Daycare, LLC	Magic Minds Daycare	Pre-enrolled	09/05/2019	
9095	3	ABC Daycare, LLC	Magic Minds Daycare	Discharged	07/02/2018	12/28/2018

Choose the list you want to review by navigating to it on the navigation menu.

Advanced Filter

Add Grouping 5 Tools


Current Query

Field: Child ID
Operator: =
Value:

Search Close

Filter Items

- 1- **Field** – The “Field” for the filter search varies depending on which list you navigated to in ChildWare.
- 2- **Operator** – Equal =, does not equal ≠, and Like (Use LIKE)

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- 3- **Value** – Type in the value you are looking for – name of site, specific age, etc...
- 4- **Action** – add or delete buttons. You can add additional filters to your query.
- 5- **Tools** – New/Clear, Save Query options for new filtering. If you selected an already created filter, the menu changes to: New/Clear, Save as/Different Name, Update Selected Query, Delete Selected Query, Set as Default Filter, Remove Default Filter from Table.
- 6- **Search/Close** – Search for query you created, or close window

Default Filters on Application List

Application

Count: 40

Select Query

Select Query

Show All**

Applicant

Pre-Enrolled

Enrolled

Discharged

Advanced Filter

Search Application

Child ID-	Name	Referral Date	Date of Birth	Age	Agency	Site	Status	Enrollment Date	Discharge Date	Eligibility	Action
18893	Markie Semerad	05/01/2019	07/20/2015	4	ABC Daycare, LLC	Magic Minds Daycare	Pre-enrolled	09/03/2019	09/10/2019	Eligibility	Enroll

For instance, if you are looking at the *Application List*, the **DEFAULT FILTER** includes **Applicant, Discharged, Pre-Enrolled, and Enrolled** status. You can scroll down to one of the pre-established filters to narrow the search such as Pre-Enrolled/Enrolled or Applicant.

Using the Default Filter for APPLICANT allows you to see

All the children on your WAITING LIST.

You can print the list using the export tool.

Application

Count: 3

Applicant

Advanced Filter

Search Application

Child ID-	Name	Referral Date	Date of Birth	Age	Agency	Site	Status	Enrollment Date	Discharge Date	Eligibility	Action
12762	Princess Ariel	06/01/2019	03/15/2015	4	ABC Daycare, LLC	Little Learners D..	Applicant	--	--	Eligibility	Enroll
11468	Billy Joel	06/28/2019	11/28/2014	4	ABC Daycare, LLC	Magic Minds Daycare	Applicant	--	--	Eligibility	Enroll
8874	Henry Harper	05/11/2018	05/01/2015	4	ABC Daycare, LLC	Little Learners D..	Applicant	--	--	Eligibility	Enroll

Using Two or More Filters


EX: Filtering for 4 year olds

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Click on the Advanced Filter button

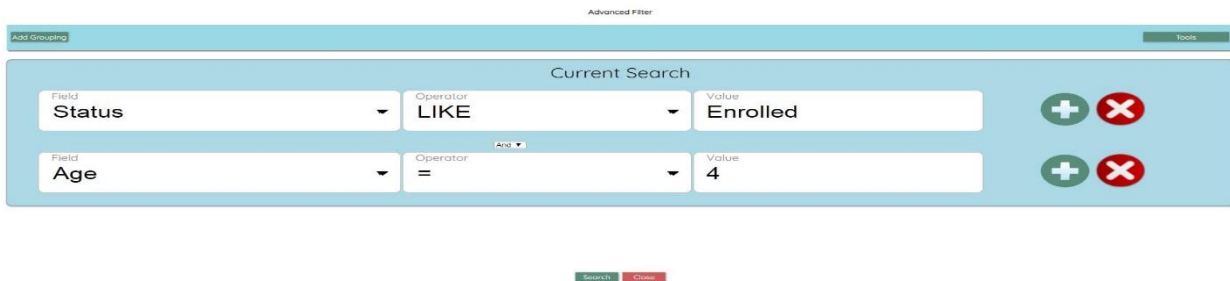
Advanced Filter

You will need to use two filters.

First Filter: Field: Status, Operator: LIKE, Value: Enrolled (this will give you pre-enrolled and enrolled children. If you want, only enrolled children use the Operator: = then click the plus sign  make sure the joining word says "And"

Second Filter: Field: Status, Operator: =, Value: 4

Click Search



Advanced Filter

Current Search

Field: Status Operator: LIKE Value: Enrolled

Field: Age Operator: = Value: 4

Search Close

Results: There are 11 children 4 years old with a pre-Enrolled or enrolled status.

Application

Count: 11


Child ID.	Name	Referral Date	Date of Birth	Age	Agency	Site	Status	Enrollment Date	Discharge Date	Eligibility	Action
18893	Markie Semerod	05/01/2019	07/20/2015	4	ABC Daycare, LLC	Magic Minds Daycare	Pre-enrolled	09/03/2019	09/10/2019	Eligibility	Enroll
18229	Shaggy Doo	05/01/2019	02/02/2015	4	ABC Daycare, LLC	Magic Minds Daycare	Pre-enrolled	09/03/2019	--	Eligibility	Enroll
15373	Elena McMahon	06/01/2019	11/04/2014	4	ABC Daycare, LLC	Little Learners D...	Pre-enrolled	09/03/2019	--	Eligibility	Enroll
12762	Princess Ariel	06/01/2019	03/15/2015	4	ABC Daycare, LLC	Little Learners D...	Pre-enrolled	09/03/2019	--	Eligibility	Enroll

Do you want to SAVE this Filter/Query?

Saving a Query/Filter

If you want to **SAVE** the **Current Search Filter**.

- 1- Click on the **Advanced Filter** Button
- 2- Click on the **Tools** Button scroll down to SAVE QUERY
- 3- **Name the Query**, click **SAVE**
- 4- You will see a **SUCCESS** toast!

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Advanced Filter

Add Grouping

New/Clear
Save Query

Current Search

Field: Status Operator: LIKE Value: enrolled

Field: Age Operator: = Value: 4

Now you can scroll down on your **Select Query** section on the menu item (Application) and pull up your **4-year-old children** automatically by scrolling down to and choosing the **Kindergarten Transition List**

Count: 11

Advanced Filter

Search Application

Child ID	Name	Referral Date	Date of Birth	Age	Agency	Site	Status	Enrollment Date	Discharge Date	Eligibility	Action
18893	Markie Semerod	05/01/2019	07/20/2015	4	ABC Daycare, LLC	Magic Minds Kindergarten Transition	Pre-enrolled	09/03/2019	09/10/2019	Eligibility	Enroll

This filter will be available until you delete it.

Deleting Saved Filters


1. Click on Search Query and scroll down to the query you want to delete.
2. Click the Advanced Filter Button
3. Click on Tools
4. Scroll down and click on Delete Selected Query.
5. A dialogue box will open. Click Yes

Are you sure you want to delete 'Kindergarten Transition' query?

Yes No

Delete Saved
✓ Filter
successfully

A Success toast will appear!

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Using the Group Button

Staff Menu

Ex: If you are looking to omit discharge staff, start on the Staff Menu.

- 1) Set-Up the filter of what you want **OMITTED**. Status> \neq >Discharged.
- 2) Then click on the **ADD GROUP** button.
 - a. In the Group – List your location(s)> **LIKE** >Name of site or agency.

Between the sites – use **OR**

- 3) Add to the list as many sites/agencies as you want followed by **OR**.
- 4) Click **Search**.

If you like what you see you can **save the query**. Give a descriptive name to the query.

If you make this, the default on the staff menu, then when you navigate to the staff menu it will only load with active staff from the sites in the filter.

The screenshot shows a query builder interface. At the top, there is a filter for 'Status' with the operator '≠' and the value 'Discharged'. Below this, there is a blue bar with the word 'And' and a dropdown arrow. Underneath, there is a section labeled 'Group 1'. Inside this group, there are two filters. The first filter has 'Location' as the field, 'LIKE' as the operator, and 'ABC' as the value. The second filter has 'Location' as the field, 'LIKE' as the operator, and 'Ann' as the value. Between the two filters in the group, there is an 'Or' dropdown arrow.


You need to create the queries – you cannot use your already saved/default query

Application Menu

Creating a filter with only Applicants and Enrolled Children

- 1) Set-Up the filter of what you want **OMITTED**. Status> \neq >Discharged.
- 2) Then click on the **ADD GROUP** button. (“add” will be between first filter and group)
 - a. In the Group – Site> **LIKE** >Name of site or agency.

Between the sites – use **OR**







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- 3) Add to the list as many sites/agencies as you want followed by **OR**.
- 4) Click **Search**.

Advanced Filter

Add Grouping

Tools

Field Status	Operator ≠	Value Discharged	 
And			
Group 1			
Field Site	Operator LIKE	Value Magic Minds	 
Or			
Field Site	Operator LIKE	Value Little Learners	 

Search

Close

This will return a list of children from the sites your chose with Applicant and Enrolled Status – it WILL NOT list the discharged children.

If you like what you see you can **save the query**. Give a descriptive name to the query.


Setting up A Default Query

If you have either Agency or Alliance level access, you will be able to see multiple sites. It can be bothersome to have to constantly search for the site repeatedly when you change your navigation options. To avoid this, you can set up a **DEFAULT QUERY**. You can only set up **one DEFAULT QUERY** at a time.

If you set up a default query – when you access the menu item you set the default filter on – it will automatically load the information you included in your default filter.

EX: Reviewing Applications for a Site. Filter is setup on the Application Menu

1. **Navigate to Applications** on your Navigation Menu.
2. Click on **Advanced Filter** and Create a Filter for the Site you want to make your default site.

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Advanced Filter

Add Grouping Tools

Current Query

Field: Site Operator: LIKE Value: Magic + X

Search Close

3. Click on **Query Search**.
4. Click on the **Advanced Filter** button.
5. Click on **Tools** and scroll down to **Save Query**.
6. Give the Query a name. Click **Save**.

Save Query

Query Name: Magic Minds

Save Cancel

Now the Query will be on your dropdown List.

Select Query

Advanced Filter Search Application

	Status	Enrollment Date	Discharge Date	Eligibility	Action	Delete
ic	Pre-enrolled	09/03/2019	--	Eligibility	Enroll	


Click on the **Select Query down arrow** and scroll down to new Query (Magic Minds)

Only that query info will appear on the screen

Click on **Advanced Filter** button

Click on **Tools**

Scroll down and click on **Set as Default Filter**

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Advanced Filter

Add Grouping

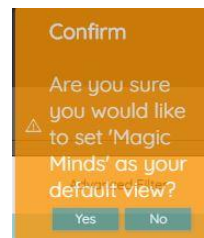
Tools

Current Search

Field: Site Operator: LIKE Value: Magic

New/Clear
Save as/Different Name
Update Selected Query
Delete Selected Query
Set as Default Filter
Remove Default Filter for Table

Click Search.



A confirmation toast will appear. Click YES. A success toast will appear. Now Magic Minds will be my default query on the Application Menu.

Default: Mag

Advanced Filter

Search Application

Now, every time you choose Application in the navigation menu, the Magic Minds Applications will automatically load showing applicant, discharged, enrolled, and pre-enrolled children.

Removing the Default Filter

You can remove the remove and change default filters by accessing the Tools Bar and choosing REMOVE DEFAULT FILTER FOR TABLE.

Click on Advanced Filter Button

Click on Tools menu

A dropdown appears – pick the task you want to perform

Advanced Filter


Add Grouping

Tools

Current Search

Field: Site Operator: LIKE Value: Magic

New/Clear
Save as/Different Name
Update Selected Query
Delete Selected Query
Set as Default Filter
Remove Default Filter for Table

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