

WebNEERS Filters & Subgroups

July 2021

Customize WebNEERS to Meet Local Needs

- WebNEERS provides a high degree of flexibility. Institute and Region level users have the ability to customize the system to meet individual program and reporting needs, as well as increase the use of the data in program management.

Customize WebNEERS to Meet Local Needs

- These functions include establishing defaults for entry of new adults and youth groups, and streamlining data entry processes.
- This slide set will focus on customizing subgroups and filters to better segment and report on programming at the local level.

Filters & Subgroups: What's the difference?

- **Filters** allow you to select (filter) adult participants or youth groups based on specific criteria. When a filter is used, only adults or youth groups who meet the filter criteria are included in the report.
- **Subgroups** are used to designate a category of adult participants or youth groups in the database. Subgroups can only be used to generate reports if you create a subgroup filter.

Filters & Subgroups: What's the difference?

- **Subgroups** can be created at the Institute and Region levels to categorize data in other ways.
- For example, a user may want to filter out information about a group of adult participants who have received EFNEP lessons together at one site.
- If so, they can create a new subgroup for the site. After completed, the subgroup can be selected within the adult record. It can also be included as part of a default for new adults to ease data entry.

Types of Filters for Adults

- Demographic filter
 - Build a filter based on specific demographic information entered from the About Me enrollment form such as age, ethnicity, residence, entry and exit dates, income level, etc.
- Subgroup filter
 - Most useful when generating reports for specific criteria not included as data entry fields on WebNEERS (such as agencies or extenders) to which participants are manually assigned in order to filter a report.
- Public Assistance filter
 - Build a filter to generate reports for participants receiving certain benefits.

Types of Filters for Youth Groups

- Demographic filter
 - Build a filter based on specific demographic information entered from the About My Class enrollment form such as grade level, gender, ethnicity, delivery type, etc.
- Subgroup filter
 - Most useful when generating reports for specific criteria not included as data entry fields on WebNEERS (such as school districts or sites) to which groups are manually assigned in order to filter a report.

Create a Subgroup & Filter



WebNEERS Home page screen shot where Setup features are accessed

The screenshot displays the WebNEERS Home page with several menu categories:

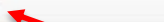
- Adults:** Manage Adults, Process Direct Data Adults, Room Codes, Manage Recalls, Manage Questionnaires, Verify Addresses, View Adult Errors.
- Reports:** Adult Mailing Labels, Email List (CSV), List of Families by Staff Member, Recall List Report, Adult Questionnaire Review, Adult Summary, Adult Diet Summary, Adult Questionnaire Summary, Subgroup List, Filter List, Public Assistance List.
- Setup:** Defaults for New Adults, Subgroups, Adult Groups, Filters, Public Assistance, Food Tags, Custom Recipes.
- Data Management:** Migrate Data, Export Data, Impact Reports.
- Youth Groups:** Manage Youth Groups, Manage Questionnaires, Verify Addresses, View Youth Errors.
- Reports:** Youth Mailing Labels, Email List (CSV), Group Detail Report, Group Names by Leader, Group List, Group Leader Summary, Group Review by ID, Youth Questionnaire Review, Youth Summary, Youth Questionnaire Summary, Subgroup List, Filter List.
- Setup:** Defaults for New Youth Groups, Subgroups, Filters.
- Tables:** Table Version Info, View Foods, Daily Recommendations, Recommended Calories, USDA Food Patterns, Dietary Reference Intakes, Poverty Guidelines Table.
- Staff:** Manage Staff, Manage Hours, View Staff Errors.
- Reports:** Staff Mailing Labels, Email List (CSV), Status, Staff List, Volunteer List, Profile Summary.
- Setup:** Add Staff, Transfer Responsibilities.
- Annual Update/5-Year Plan:** Manage Program Impacts, Manage Community Partnership Impacts - Policy, Systems and Environmental Change, Edit Delivery Sites and Partnerships, Manage Settings and Sectors: Policy, Systems and Environmental (PSE) Change.
- Questionnaires:** Adult Questionnaire Sets, View Youth Questionnaire Sets.
- Reports:** Adult Questionnaire Set Report, Youth Questionnaire Set Report, Adult Question List Report, Youth Question List Report, Adult Question Detail Report, Youth Question Detail Report.

Two red boxes highlight the 'Subgroups' option in the 'Setup' section for both 'Adults' and 'Youth Groups'. Red arrows point from text boxes to these options.

Click here to create an Adult subgroup and filter



Click here to create a Youth subgroup and filter



Creating a Subgroup & Filter


1. Select **Add Subgroup** on the left of the screen above the table of subgroups.

Back | Home >> Adult Subgroups

+ Add Subgroup

SEARCH:

SHOW All ENTRIES

Manage	Type	Name	Description	Date Modified
 	Region	Rockdale County	Sessions Conducted in Rockdale County	06/12/2014
 	Region	DeKalb County	DeKalb Data Only	12/01/2014

Creating a Subgroup & Filter

2. Enter a **Name** for the subgroup.
3. Enter a **Description** for the subgroup
4. Select **Automatically Create Filter** to create a corresponding filter for this subgroup and **Save**.

WEB NEERS Help | WebNEERS Manuals

<< Back | Home >> Adult Subgroups >> Create New Adult Subgroup

University of California

Name * This field is required

Description

Filter Generation

Automatically Create Filter?

Cancel Save


Generating reports using subgroup filters


Before a report can be generated using a subgroup filter, the subgroup must first be assigned to the group or groups in which the subgroup applies


Assign (select) the subgroup


36 : Davis Elementary + Remarks

CONTACT INFORMATION LEADERS ENTRY & EXIT DATA DEMOGRAPHICS YOUTH CHECKLIST

Start Date
10/05/2012 

Program
A | EFNEP 

Delivery
J | School Enrichment Programs 

End Date
11/30/2012 

Number of Lessons
9

Number of Sessions
9

Number of Hours
9

Subgroups

- R:Boys and Girls Club
- R:Davis Elementary
- R:Sample group

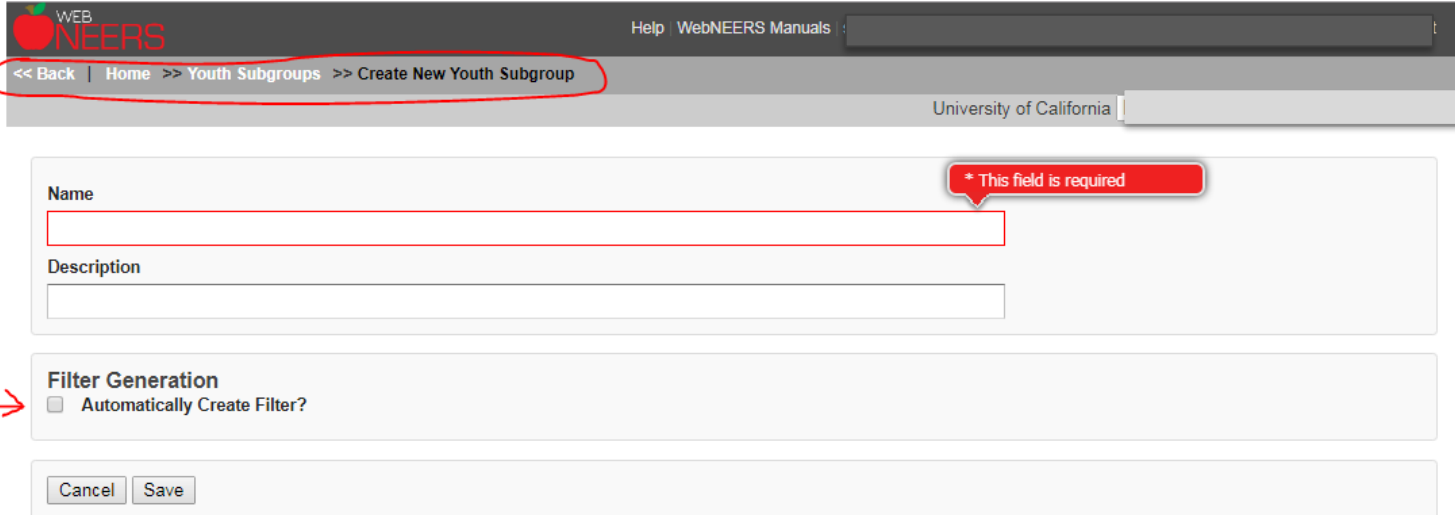
Cancel Save

Example: Filtering outcomes by group

Scenario: You just concluded administering the post-education *Eat Well + Move* evaluation to a second grade class. The teacher has asked you for a summary of her students' behavior changes pre and post-nutrition education.

Example: Filtering outcomes by group

Step 1: Create a new youth subgroup (see circled path below). Don't forget to click "Automatically Create Filter" and "save".



The screenshot shows the WEBNEERS web application interface. At the top, there is a navigation bar with the WEBNEERS logo on the left and "Help WebNEERS Manuals" on the right. Below the navigation bar, a breadcrumb trail is visible: "<< Back | Home >> Youth Subgroups >> Create New Youth Subgroup". This breadcrumb trail is circled in red. To the right of the breadcrumb trail, the text "University of California" is displayed. Below the navigation bar, there is a form for creating a new youth subgroup. The form has two main sections: "Name" and "Description". The "Name" field is empty and has a red border, with a red tooltip above it that says "* This field is required". The "Description" field is also empty. Below these fields, there is a section titled "Filter Generation" with a checkbox labeled "Automatically Create Filter?". A red arrow points to this checkbox. At the bottom of the form, there are two buttons: "Cancel" and "Save".

Example: Filtering outcomes by group

Step 1: Create a new youth subgroup (see circled path below). Don't forget to click "Automatically Create Filter" and "save".

The screenshot shows the WEBNEERS web application interface. At the top, there is a navigation bar with the WEBNEERS logo on the left and "Help WebNEERS Manuals" on the right. Below the navigation bar, a breadcrumb trail is visible: "<< Back | Home >> Youth Subgroups >> Create New Youth Subgroup". The "Create New Youth Subgroup" link is circled in red. Below the breadcrumb trail, the text "University of California" is displayed. The main content area contains a form with the following fields:

- Name:** A text input field containing "Hoopa Valley Elementary School". A red error message bubble above the field says "* This field is required".
- Description:** A text input field containing "Mr. Montana – 2nd grade class".
- Filter Generation:** A section with a red arrow pointing to a checkbox labeled "X Automatically Create Filter?".

At the bottom of the form, there are two buttons: "Cancel" and "Save".

Example: Filtering outcomes by group

Step 2: Return to the WebNEERS home page. Select “Manage Youth Groups”. Search for each group that needs to be included into the report. (For example: Mr. Montana). Click the wrench next to the group to edit.




<< Back | Home >> Manage Youth Groups

University of California

Youth Filter: All Youth Groups Staff Filter: All Staff Run Filter

+Add Youth Group

SEARCH: Mr.M SHOW All ENTRIES

Manage	ID	Group Name	Leader	Program	Delivery	# of Youth	# of entry/exit questionnaires
  	6340	Mr. Montana grade 2		A	J	37	37



Example: Filtering outcomes by group

Step 3:

Select the “ENTRY & EXIT DATA” tab and select all appropriate subgroup(s), including “Hoopa Valley Elementary School” to find pre/post evaluation outcomes for the teacher in the example.

Don't forget to save.

Step 4:

Repeat steps 2 and 3 for each group to be included in the report.

6340 : | Mr. Montana grade 2 + Remarks

CONTACT INFORMATION | **LEADERS** | **ENTRY & EXIT DATA** | **DEMOGRAPHICS** | **YOUTH QUESTIONNAIRE**

Start Date
01/28/2021

Program
A | EFNEP

Delivery
J | School Enrichment Programs

Subgroups

- F:Online Data Collection
- F:Temporary Remote Education
- I:CHFFF
- I:Cooking Academy
- I:Youth Sampling Plan - 3-5
- I:Youth Sampling Plan - 6-8
- I:Youth Sampling Plan - 9-12
- I:Youth Sampling Plan - K-2
- R:Hoopa Valley Elementary School
- R:Zane Middle School

End Date
[]

Number of Lessons
6

Number of Sessions
6

Number of Hours
6

Number of Graduates
37

Example: Filtering outcomes by group

Step 5:

Run the needed reports. For example, the *Youth Questionnaire Summary* Report.

The screenshot displays the WEB NEERS interface. The top navigation bar includes the logo, 'Home', 'University of California', 'Help', 'WebNEERS Manuals', and 'Logout'. The main content area is divided into three columns: 'Adults', 'Youth Groups', and 'Staff'. The 'Youth Groups' column contains a 'Reports' section with a red box around it. A red arrow points to the 'Youth Questionnaire Summary' report within this box. The 'Reports' section in the 'Youth Groups' column lists: Youth Mailing Labels, Email List (CSV), Group Detail Report, Group Names by Leader, Group List, Group Leader Summary, Group Review by ID, Youth Questionnaire Review, Youth Summary, Youth Questionnaire Summary, Subgroup List, and Filter List. The 'Adults' column has a 'Reports' section with a red box around it, listing: Adult Mailing Labels, Email List (CSV), List of Families by Staff Member, Recall List Report, Adult Questionnaire Review, Adult Summary, Adult Diet Summary, Adult Questionnaire Summary, Subgroup List, Filter List, and Public Assistance List. The 'Staff' column has a 'Reports' section with: Staff Mailing Labels, Email List (CSV), Status, Staff List, Volunteer List, and Profile Summary. Below the 'Reports' section in the 'Youth Groups' column is a 'Setup' section with 'Defaults for New Youth Groups'.

Example: Filtering outcomes by group

Step 6:

Select the Youth Group Filter that corresponds to the new subgroup.



The screenshot shows the WEB NEERS interface. At the top, there is a navigation bar with the logo, "Help WebNEERS Manuals", and "Logout". Below this is a breadcrumb trail: "<< Back | Home >> Youth Questionnaire Summary". A search bar contains "University of California".

The main content area has a section titled "Youth Group Filters" which is circled in red. It contains a dropdown menu with the selected option "Hoopa Valley Elementary School_filter (I)".

Below this is the "Report Period" section. It includes a note: "To include all currently available data for this reporting period, leave the begin and end dates '00/00/0000'. To view a subset of the data, enter specific dates." This section contains two date input fields: "Begin Date:" with the value "10/01/2020" and "End Date:" with the value "09/30/2021". Both date fields are enclosed in a red rectangular box.

At the bottom of the form are two buttons: "Cancel" and "Submit". A red arrow points to the "Submit" button.

Q&A: Can we use subgroups or filters to help us identify specific groups (ex: faith-based, library, retail, etc.)?

Yes.

Q&A: Do filters entered in the past stay on WebNEERS?

Yes. Counties should review subgroups and filters at the beginning of each fiscal year and remove ones that are no longer needed. Subgroups and Filters may be added throughout the fiscal year.



Q&A: Where can I find more information?

The WebNEERS Manual: Section 3

https://www.webneers.net/documents/manuals/Section_3_Setup_and_Customizing_WebNEERS.pdf

