

COLLECTIONS AND COHORTS

*Battle Creek Community-Wide Non-Profit
Database*

Prepared and managed by Goodwill Industries of Central
Michigan's Heartland

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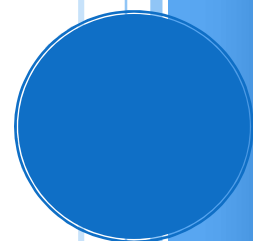


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COLLECTIONS AND COHORTS

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INTRODUCTION

Collections are a means of grouping a number of participants together in a data set under a common name. They allow a user to record TouchPoints as a group in one action, can be used to record attendance for training or other events at once, and act as a means of sorting in report functions.

One limitation to Collections is the way they are tied to the programs they are created in. First, Collections have to be associated with a Collection Type (created and managed by the ETO Administrator), and those have security settings that allow their use only in specific authorized programs. The Collection Type “iACT – Cohort”, for example, can only be used or viewed from within *KCC – iACT* and *KCC Follow-up*. Second, each Collection can only be used from within one program, and by association that will be the program they were created in. They cannot be transferred to other programs, and when a participant is enrolled in a different program, the Collection cannot be managed from inside that other program. In some cases, such as the previously mentioned iACT Cohorts, it is necessary to create the same Collection again—with the exact same name—within the second program. While this may seem like the same Collection, it really is a completely different one with the same name.

Collection Types are created and managed by the ETO Administrator. If you need to create a new Collection and the existing Collection Types do not meet the need of this new Collection, contact the Administrator to request a new Collection Type.

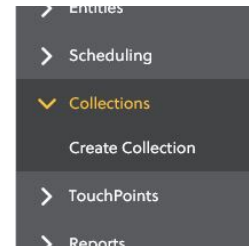
A positive attribute of Collections is that a participant may be associated with a virtually unlimited number of Collections, though this can also be a limitation as the Collection name remains a permanent part of a participant’s record and cannot be changed in any way—within that record—once it’s been associated with a participant (making it very important that the Collection Name be recorded correctly the first time). However, once a Collection is added to a participant’s record, it will always be there and can forever be used to filter and sort when working with reports.

This chapter will explain, first, the concepts and underlying functions of Collections for those who need to know those kinds of details, then will move on to step-by-step instructions on each of the functions related to creating and editing a Collection. The step-by-step portion begins on page 8, if you prefer to skip to that section.

Create Collection

First, make sure you are logged into the program you want the Collection to be used in. In most cases, ETO will help with this by the security settings for each Collection Type, meaning you will not be able to select the appropriate Collection Type unless you are in an associated program.

“Collections” is a top level Navigation Menu heading, though there is only one command beneath it: “Create Collection”. Selecting this command will direct you the **Create a Collection** page and prompt you for a Collection Type. Not every program is set up to use collections, and so there will be no Collection Type for that program. If you need to use Collections in a program you use, contact the ETO Administrator to have it set up and a Collection Type created.



In most cases there will be only one choice in the drop-down list box of Collection Types. When you select one from the list ETO will automatically go to the next page where you are required to select the participants who are going to make up the new Collection. ETO here shows you all participants actively enrolled in the current ETO program and you can select all at once or as few or as many as you need. You can also use the filters for name, DOB, and case number if the number of active participants is long and you need to find them quickly. As part of a very recent upgrade to ETO, you can now also select and add dismissed participants, and ETO will show dismissed participants in the final edit page. Previously, once a participant was dismissed from a program they could not be part of a new Collection or added to an existing one, and they would simply disappear from the list of participants within the Collection even though the Collection Name would forever be a part of the Participant’s record.

Once participants have been selected, clicking on either “Continue” button, on the right side at the top and bottom of the page, ETO will take you to the Collection edit page where you can see a list of all the participants you selected on the left side, each with a button to remove them from the Collection, and buttons to add new members that can be used at any time (and will take you back to the participant selection page). Participants that have been dismissed from the ETO program will still appear, as long as the Collection is active—has members still enrolled in the ETO program—with the word “Dismissed” appearing in red letter beneath their name.



Depending on the Collection Type, there may be questions on the final edit page to answer. This is also where you give the Collection/Cohort its name, and you cannot save the Collection without doing so. There should be a naming convention for each of the Collection Types (see to Appendix A at the end of this chapter), so be sure to refer to that so the names are consistent and correct. Remember, once a Collection is associated with a participant, though you *can* change the name of the Collection at the group level, the old—incorrect—name will always be attached to the participant’s record and cannot be changed.

Quick Search for Collections

While there are a couple different ways to search for a Collection in ETO, the easiest way remains the Quick Search bar at the top of almost every ETO screen. Quick Search can be used to search for Participants, Entities, and Collections, though the functionality is slightly different with Collections.

Collections are listed at the bottom of the drop-down list box in the second field of the Quick Search bar, appearing as a heading in bold letters, and the applicable Collection Types indented in normal font below that. If there are no Collection Types assigned to the program, the option to search by Collection will not even appear in the pick-list. Select the Collection Type you want to search and either tab over to or click on the “Search” button and ETO will search for the parameters you selected. You can put part of a Collection/Cohort name in the first box [Search Term(s)] to limit the results, or leave the box blank to see all Collections in the current program.



Quick searching for a Collection is different from Participants and Entities in that you cannot execute a site-wide search with Collections as you can with the others. Because Collections are limited to one program—the program it was created in—you are only allowed to search for Collections from the program you are logged into, and only when there are Collections created within that program.

You can even get to the Collection to add members from a participant’s dashboard in their Collection Memberships module. As long as the Collection has active members the Collection Name will appear as a hyperlink. Clicking that link will take you to the Collection dashboard where you can find a link to add members (or remove them).

Participant Dashboard

On every participant's dashboard is a module called "Collection Memberships". This module shows only the names of the Collections the participant has been a member of, even those not associated with the current program. This is the one place where you can see Collection information in program other than the one it was created in, though only in read-only format. In the Collection's home program the Collection Name here will appear as a hyperlink and clicking on the name will take you to the Collection dashboard, but when seen from any other program the name does appear, but not as a hyperlink, and it will not take you anywhere.

Collection Dashboard

Collections have their own dashboards, just as Participants and Entities do. Clicking on the Collection Name in the Quick Search result page takes you directly to the dashboard.

The dashboard contains a module with the basic Collection Information, another with a list of participant members of the Collection (ten names to a page, so there may be multiple pages), and a module for Collection TouchPoints (not currently applicable).

The Collection Information module will simply show you the Collection Name (the Collection Type is at the top of the module) and the number of members in the Collection. Bottom center of the module, applicable action icons should appear. What icons, if any, appear will depend on your security level in ETO. If you have access to work with Collections then all three icons—edit, disable, and delete—are likely to appear.



The Collection Member module simply shows a list of all those participants who've been members of the Collection. It can only show ten names at a time, so there will likely be more than one page. If so, page numbers appear at the bottom of the name list. Clicking on the next page link will cause the next set of names to appear.

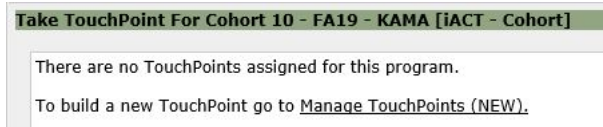


The last module on the dashboard is Collections TouchPoints. TouchPoints can be designed for use with single participants, a group of participants, entities, or specifically for Collections. This module functions just like the Recent TouchPoints module on a participant dashboard. Though there are currently no Collection TouchPoints on the **BC Community Access** site, some may be developed in the near future, to make full use of some of the



new features expected to be added to our license to ETO. Because there are no Collection TouchPoints in any of our programs, this module

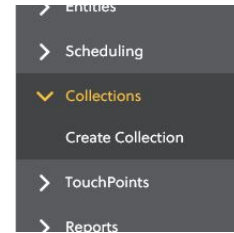
will not show anything at present, and clicking the [+New](#) link at the bottom of the module will return an error message.



STEP-BY-STEP INSTRUCTIONS

Create Collection

1. Log into or switch to the program where you will be using the Collection.
2. Select Collections | Create Collection from the Navigation Menu.



 A screenshot of the top part of a web page. It has a green header bar with the text 'Create a Collection'. Below it is a white dropdown menu with the text '-- Select a Collection Type --' and a small downward arrow on the right.

3. Select the Collection Type from the drop-down list box on the "Create a Collection" page. A

second **Create a Collection** page will appear, showing all the participants actively enrolled in the program.

 A screenshot of the 'Create a Collection' page. It shows a green header bar with the text 'Create a Collection'. Below it is a white dropdown menu with the text '-- Select a Collection Type --' and a small 'x' icon on the right. Below the dropdown is a list of collection types, with 'iACT - Cohort' selected and highlighted in green.

4. Search for the participants you want to assign to the Collection. You can use the navigation controls at the top or the bottom of the list to move through the pages, if there is more than one page. You can also easily add or removed participants *after* the Collection has been saved. The buttons on the navigation bar (in

 A screenshot of a navigation bar. It contains several buttons: a left arrow, a double left arrow, a button with the number '1' (highlighted with a red box), a double right arrow, and a right arrow. To the right of these buttons is a 'Page size:' dropdown set to '50'. Further right is the text 'Page 1 of 1, rows 1 to 23 of 23'.

order) will take you the first page, a previous page, a

specific page (if more than exist), the next page, or the very last page. You can also select the number of names you want to show on the page or pages (10, 20, 50, 75, 100, or All). The line of text at the end of the bar tells you what page you are on, what rows ETO is showing, and how many total records there are.

You can also use the filter boxes at the top of the list to filter the selection by Name, DOB, or even the Case Number if known.

 A screenshot of three filter boxes. Each box has a green header with a label: 'Name', 'DOB', and 'Case No.'. Below each header is a white input field with a small 'T' icon on the right.

5. Click to check the checkbox to the left of the participant's name, selecting as many or as few as you need (you must select at least one, but there is no limit to how many can be part of the Collection). Or, you can select all names at once, if appropriate, by clicking to check the box immediately below the navigation bar.

 A screenshot of a participant list. It shows a table with a green header bar. The first column has a checkbox (highlighted with a red box) and the second column has the text 'Name'.

6. Once the participants you want in the Collection are selected click the "Continue" button on the right side at the top or the bottom of the name list and ETO will advance to the next step **"Adding to [Collection Type]"**.

 A screenshot of a green button with the text 'Continue' in white.

7. Refer to any naming conventions prescribed for the Collection Type (see Appendix A on page 13) and enter the Collection/Cohort Name in the first field (the field name will depend on the Collection Type selected). **This is a free text field with no set limit on the number of characters. This is a required field.**

iACT - Cohort Name: *

8. Answer any other questions on the form—these vary by Collection Type—as accurately as possible.

Class Type
☐ CNA
☐ KAMA
 Clear Selection

None of these questions are required, so they may be skipped if the answers are unknown. *These are optional fields.*









Semester
☐ Fall
☐ Spring
☐ Summer
 Clear Selection

9. Click on the “Save” button at the bottom to complete the process. Please make sure everything is correct, as a Collection once associated with a participant will remain with them and cannot be changed (any changes made will appear only as an additional Collection).

Quick Search for an Existing Collection

Q Search Term(s)... Within **iACT - Cohort** In **KCC - iAC** SEARCH

1. Enter a part of the Collection name you need to find in the first box—“Search Term(s)” —of the Quick Search bar. The characters entered do not have to be the first part of the Collection Name, but must be an exact match to *part* of the name, so the less you enter here the better. You can even leave the box blank to return all the Collections in the ETO program.
2. Select the Collection Type from the second box— “Within” —a drop-down pick list on the Quick Search bar. The Collection Types have context descriptive names; such as “BC Hubs Site”, “iACT – Cohort”, and “Work Hardening Collections”; and in most cases only one option will be available so the choice should be simple.
3. Skip or tab through the third box—“In”—as there is no option to select anything but the current ETO program (if you’d previously selected the Site for this box, it will automatically change to the current program name when you select a Collection Type in the previous box). Click on “Search”, or press the <Enter> key if you’ve tabbed to it. ETO will present a list of Collections for the current program that match the criteria entered, as shown at the top of the next page.


Quick Search Results				
Matching iACT - Cohort Collections for:				
<input type="checkbox"/> Include Disabled				
	Take Action	Name	Subject Type	Active Member Count
1	  	Cohort 1 - FA17 - KAMA	Participant	0
2	  	Cohort 10 - FA19 - KAMA	Participant	14
3	  	Cohort 2 - SP18 - KAMA	Participant	0
4	  	Cohort 3 - SP18 - KAMA	Participant	0
5	  	Cohort 4 - SU18 - CNA	Participant	0
6	  	Cohort 5 - FA18 - KAMA	Participant	10
7	  	Cohort 6 - FA18 - CNA	Participant	11
8	  	Cohort 7 - SP19 - CNA	Participant	9
9	  	Cohort 8 - SU19 - KAMA	Participant	3
10	  	Cohort 9 - SU19 - CNA	Participant	10
11	  	Corhort 11 - FA19 - CNA	Participant	14

4. If you do not see the Collection you are looking for, click to select the **"Include Disabled"** box at the top left corner of the result list and ETO will execute the search again and will include any disabled Collections in the result.

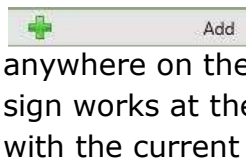


Edit an Existing Collection

- To edit the Collection (add or remove members, or change the Collection Name), click the pencil icon from the Take Action column of the Quick Search result list. *You can also click on an active Collection name on a participant's dashboard to go to the Collection dashboard, then click the pencil icon at the bottom of the "[Collection Type] Information" module near the top of the dashboard.* ETO will go to the **"Editing Collection:"** page.


- To change the Collection Name, tab into or click on the Collection Name text box and make the appropriate changes.

iACT - Cohort Name:
- To add members to the Collection, click on either green + sign at the top or bottom of the member list (you can click anywhere on the bar at the bottom of the list, but only the green + sign works at the top of the list). ETO will go to a participant list with the current members already checked and unchangeable. Select the member or members you need to add, and click on the "Save" button at the top or bottom of the page.


- To remove members from a Collection, click on the white X in a red circle icon to the right of their name. A dialog box will appear asking if you 'remove' or 'delete' the participant. Selecting 'Remove' will take the participant out of the Collection as an active member but will retain **record** of their membership for reporting purposes later, in the same way dismissing them from the program

will do. Selecting 'Delete' will remove any record of their ever having been in the Collection, though any responses to Collection TouchPoints will remain until those responses are individually deleted.

5. To show members of an inactive Collection (Collection is disabled or all the members have been dismissed from the ETO program), click to select the box for **Show removed members** at the upper right corner of the page and ETO will display the member names in italics with the "Dismissed" tag beneath their names in red letters.

☒ Show removed members



All	
Atcher, Heaven	Dismissed
Ekins, Casey	Dismissed
Edwards, Fannie	Dismissed
Holley, Rickie	Dismissed
Kelley, Paul	Dismissed
Kowalski, Alicia	Dismissed
Lancaster, Todd	

6. To add dismissed (from ETO program) participants to a Collection, on the participant list page (after clicking "Add" on the Collection Edit page), click to select the box for **Include Dismissed Participants** at the upper left corner of the list, immediately below the "Participants" tab. ETO will expand the list to include all the participants that have ever been enrolled in the ETO program, allowing you to select and add participants— even if they are no longer active— without having to enroll them again.



Navigating Between Dashboards

ETO can be difficult to move around in, especially for one who doesn't use it often. There are some little known tricks that help you go straight from one place to another, just as clicking on a different ETO program name in the **Programs** module on a participants dashboard will make ETO jump straight into that program—eliminating the need to manually navigate to that program—and into that same participants dashboard. This section is included specifically to provide some of these tricks to using ETO a little bit easier. You can start on any dashboard.

1. Collection dashboard to Participant dashboard. From the Collection dashboard, scroll to the bottom of the page and find the **Collection Members** module at the bottom right side of the page. All participants assigned to this Collection are listed, ten names to a page. Rather than running a new search for a



Collection Members	
iACT - Cohort Members	
Name	
Anderson, Courvoisier	
Cork, Kerry	
Elliott, Jordan	
Ferguson, Troy	
Frazier, Jerome	
Hewitt, Chad	
Holmes, Keyvlin	
Kurtis, Christopher	
McKay, DaQuan	
Morris, Jerry	
Page: 1 2	

participant, you can click on the name of one here and ETO will switch to that participant's dashboard.

2. Participant dashboard to Collection dashboard. From the Participant dashboard, scroll down to the middle of the page and locate the **Collection Memberships** module. The name of any Collections the



participant has been a member of, including disabled or inactive Collections, will appear in dark

blue text. Hover the mouse pointer over the Collection Name and it should turn to a selection pointer. Click on the Collection Name and ETO will switch the Collection dashboard. If the Collection is inactive or disabled, the name will appear in black text and the mouse pointer will not change.

APPENDIX A – COLLECTION NAMING CONVENTIONS

BC Hubs Site

There should not be need to create more BC Hubs Site Collections, unless a new Neighborhood HUB is opened by Michigan WORKS!.

The only naming convention for this Collection Type is they should be the name of a Neighborhood HUB Site.

iACT – Cohort

This Collection Type is a combination of the Cohort number, Semester, and Program acronym. The format is **Cohort [#] – [season/year] – acronym**. The components should be separated by a short dash with spaces before and after the dash mark.

Examples: Cohort 4 - SU18 - CNA
Cohort 10 - FA19 - KAMA
Cohort 11 - FA19 – CAN

KCC staff can run a report ([iACT Cohort Names from Academic Program](#)) to get a system generated Collection/Cohort Name. If exported to either an Excel or CSV file, you can copy and paste to reduce/eliminate error.

iACT and Follow Up Cohorts

iACT Cohorts (from Academic Program TP)	KCC Follow Up Cohorts (from Academic Program TP)
Cohort 01 - FA17 - KAMA	Cohort 01 - FA17 - KAMA
Cohort 02 - SP18 - KAMA	Cohort 02 - SP18 - KAMA
Cohort 03 - SP18 - KAMA	Cohort 03 - SP18 - KAMA

Work Hardening Collection

This Collection Type is the iACT program acronym, space, program start date. **[program acronym] [program start date]**.

Example: KAMA 9/9/2019

INDEX

(Not complete)

