Entity Contact Record

Battle Creek Community-Wide Non-Profit Database

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

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Table of Contents

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Introduction

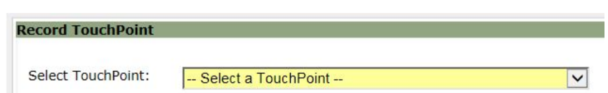
This chapter details the procedures for recording contacts with Entities and printing out a Call Log for yourself and others. Some agencies may choose to use ETO to keep a log of calls and site visits to outside agencies and organizations. We have a TouchPoint on the **BC Community Access** site (also available on the **Goodwill Central Michigan Heartland**) made for this purpose: "Record Contact with Entity". Associated with this TouchPoint is a report, "Call Log", found under the Call Log Category of the Report List that will generate a list of contacts by personnel on ETO.

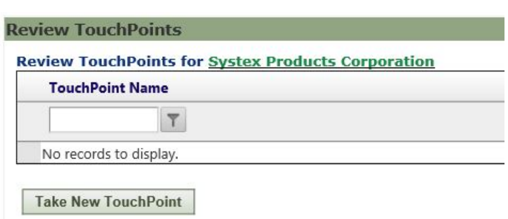
As with every chapter, this one will start with a conceptual view for those of us who need to know the nuts and bolts of how things work, and then there will be a Step-by-Step section detailing every step of the process including what kind of answers are expected and accepted. If you want to skip to the process details, and make this as short and simple as I'm able to make it, you might want to skip to the Step-by-Step section beginning on page 6.

Record Contact with Entity

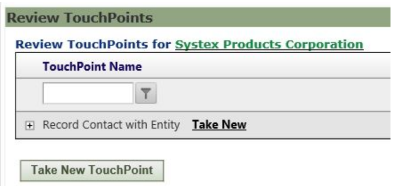
TouchPoints are not limited to participants, but can be designed for use with Entities as well. This is rather rare for us, and in most cases this will be the only TouchPoint you use for an entity, but this is the way to record your efforts with agencies and organizations outside of our own.

You can get to it in any one of two ways. First, you can select TouchPoints | Record TouchPoints from the Navigation Menu and then select the correct TouchPoint from the list. Or you can search for the entity you want to record a contact with in the Quick Search bar and select View / Record TouchPoint from the fly-out menu that pops up when you click the entity name in the search result.





This will open the "Review TouchPoints" page for the entity in ETO. If no TouchPoint has yet been recorded for that entity, a message line will state, "No records to display". If any previous contact records *have* been recorded, they will display just as in the "View TouchPoints" pages of participants, as illustrated here. You can click the Take New link to the right of the TouchPoint name and ETO will open a new TouchPoint form. You can also click the expand icon [+] to the left of the TouchPoint name to expand and display the list of those TouchPoints.



The TouchPoint is very similar to the "Case Notes" (Goodwill site) and "Case notes – community data" (Community Access site). Some of the fields are optional, though all should be filled out if possible, for a good call log report. The fields will be explained completely in the Step-by-Step section beginning on page 6, but include a Date of Contact, Type of Contact, Time Spent, Purpose of Contact, Result of Contact, Notes, and a Follow-up Reminder.

Call Log Report

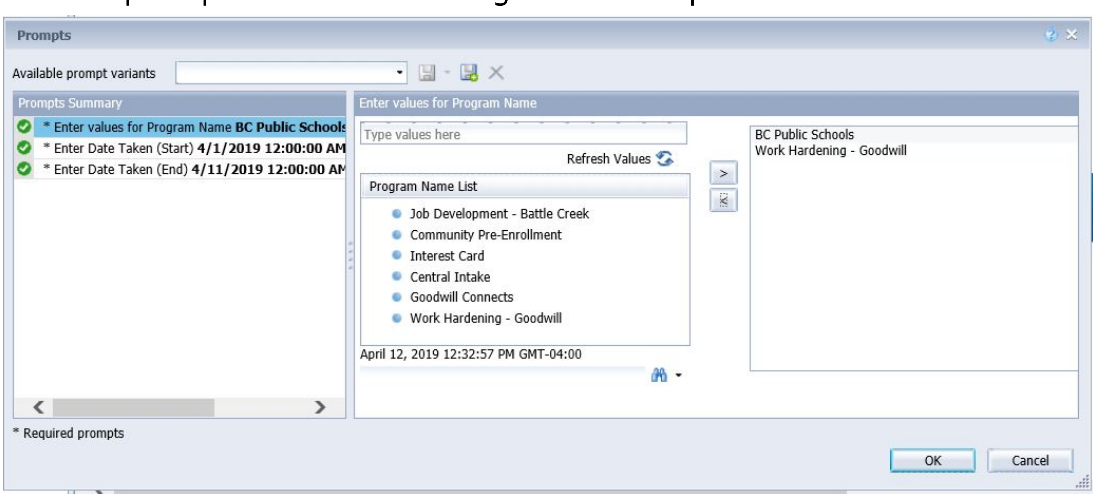
As of this writing, all users can see each other user's call logs so that we can reduce redundant efforts with outside agencies by seeing what other contacts are being made.

This report is not in the same category as most of our custom reports, but resides in the "Call Logs" section of the Report List. It's the only report you should be able to see in that section and has the descriptive title "Call Log".

For reports to run properly, your computer must be set up to run SAP software. If reports refuse to open or run, contact the ETO Administrator to help get the report software to run for you.

When you click on the report link ETO will open the report in a new window. A modal window will pop up with prompts for a date range.

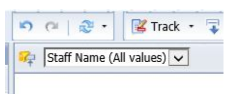
The two prompts set the date range for it to report on. Because of limitations



for the underlying queries that supply data to this report, the date range prompted for are the date the TouchPoints were actually taken, the date at the very top of the TouchPoint in the green band. That makes it extra important this date is set correctly. For this reason, and for this TouchPoint, the "Date Taken" field is set to be blank by default so you cannot accidentally save the record with the current date when you need to make it a different date. This date should be set the same as the Date of Contact so the report gives you the data you expect.

The first thing to understand about the reporting tool is the sample report that will appear on the screen will not be complete. It's a sample only, and you must "Print" (export) the report into a final output to see the complete report. This will be explained in full in the Step-by-Step section toward the end of the chapter. The report software does not print directly, but can only export the output to another file.

The report is divided into sections based on Program Staff/User Name, and a filter bar at the top will enable you to filter out all but one name that you can select.



You can select other filter criteria with the tool, though this is an advanced option and you should be certain *not* to save the report if you make changes like this.

Step-by-Step Instructions

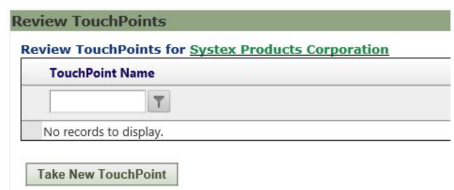
The following instructions will describe each field in the TouchPoint including: Type of field with data requirements (text in green), purpose of the field, conditional effects, and whether it is a required field or not (required fields are notified in red text). Fields that are said to be 'optional' should not be taken to mean they are not necessary or do not need to be filled out. *For the sake of good reporting, fill out all fields to the best of your ability; do no skip any because you don't think they are important.* This only means that entry of the TouchPoint will not be held up if the question is not answered.

Record Contact with Entity

1. Use the Quick Search Tool to find the entity you made contact with. ETO will display a list of entities that fit the criteria you entered in the search.

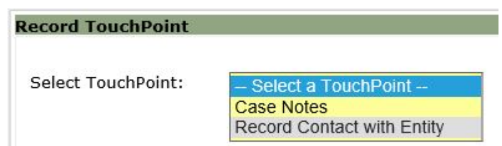
2. Click on the name of the entity in the search result window. A fly-out menu will pop up with choices to work on the entity.

3. Select "View / Record TouchPoint". The entity's "View TouchPoints" page will open.



4. Click the "Take New TouchPoint" button. The "Select TouchPoint" control will appear. If the TouchPoint has been previously recorded and is listed on the Review TouchPoints page, you can also click on "Take New" and ETO will immediately open the TouchPoint form.

5. Select "Record Contact with Entity" from the drop-down list box and ETO will open the TouchPoint form.



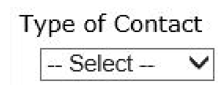
6. Complete the TouchPoint as completely as possible. The fields (questions) are described in detail below.

   Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date will be blank by default for this TouchPoint. This should be the same as the Date of Contact with the entity. The *Call Log* report

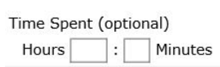
finds the date range based on this date, so it's important the date match the "Date of Contact". Enter the correct date directly into the date box, or use the calendar tool to select the date. *This is a required field*.

Date of Contact: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. Although redundant, this date is included in the actual report. Type the date of contact with this entity directly into the date box, or use the calendar tool to select the date. *This is a required field*.

Type of Contact: This is an exclusive choice (can select only one choice) drop-down list box with pre-selected choices for types of contact: "In Person", "Phone", "Email", "Social Media", "Text", " Site Visit", and "Other. Select the most appropriate answer from the list. Selecting "Other" will cause a new question, "'Other' Type of Contact Details", to appear to the right of this one. *This is a required field*.



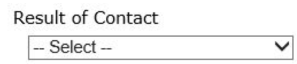
Time Spent (optional): This is a time field formatted to accept hours and minutes. Type the number of hours in the box marked "Hours" and/or the number of minutes in the box marked "Minutes". This will help to track the amount of time spent on the behalf of each participant. Do not put only the time spent speaking with the entity, but consider all the time spent on the behalf of a participant as a result of this contact, including the time spent completing the TouchPoint. Although this is an optional field, it's best to keep a record of how much time you spend working on the behalf of a client. This is an optional field.



Purpose of Contact: This is an exclusive choice (Can select only one) drop-down list box with pre-selected choices for reasons one might have contact with an entity: "FOC Orientation/Tour", "Goodwill Connects", "2Gen-Good SYSTEMS", "Information", "Initial call to set up appointment", "Looking for employees", "OJE", "Partner contact", "Return to work", "Site check", "Supervisor Training", "VITA", and "Other". This standardized list is for categorizing reports and has a pretty broad list of choices. Select the most appropriate answer. If you select "Other", a new question will appear and become required, "Describe 'Other'

Purpose of Contact" to explain this other purpose. This is an optional field.

Describe 'Other' Purpose of Contact: This is a free-text field (75 characters). If you selected "Other" from the previous question, "Purpose of Contact", this question will appear requesting an explanation of your answer, and it will become required. Type a short reason for this contact directly into the text box. *This is a required field*.



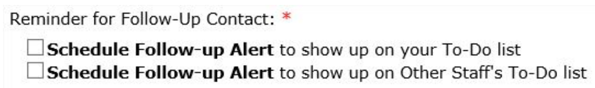
Result of Contact: This is an exclusive choice (Can select only one) drop-down list box with pre-selected choices for possible outcomes: "Agreed to work with Goodwill", "Schedule appointment", "Interested-Requested follow-up", "Looking for employees", "Started OJE", "Completed OJE – Not hired", "Completed OJE – Hired", "Has open positions available", and "Other". This standardized list is for categorizing reports and has a pretty broad list of choices. Select the most appropriate answer. If you select "Other", a new question will appear and become required, "Other Result Detail" to explain this answer. This is an optional field.

Other Result Detail: This is a free-text field (75 characters). If you selected "Other" from the previous question, "Result of Contact", this question will appear requesting an explanation of your answer, and it will become required. Type a short reason for this contact directly into the text box. *This is a required field*.

Notes: This is a free-text field (8000 characters). Type a succinct but detailed narrative of the contact directly into the text box. There are plenty of characters available so you can be as thorough as you need. Make sure it makes sense to others who will read the notes in reports. *This is a required field*.

Follow-up Reminder: This is a single-option check box. If you want to set an automated follow-up reminder, click to check this box and the "Reminder for Follow-Up Contact" field will appear immediately after it. This is an optional field.

Reminder for Follow-Up Contact: This is an exclusive choice (can choose only one) option group. Choices are "Schedule Follow-up Alert



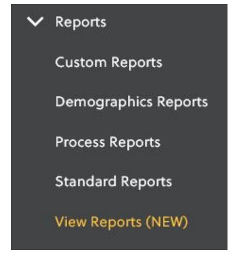
to show on your To-Do list" and "Schedule Follow-up Alert to show on Other Staff's To-Do list. If you want a reminder sent to *your* To-Do list in ETO, click to select the first option. An Alert Date control will appear with a calendar control and blue links that will automatically add 1, 7, 30, 60, or 90 days to whatever date is in the date control, a reminder type option group ("Reminder to complete this TouchPoint" or "Reminder to take a new TouchPoint"), and an alert notes field.

If you want a reminder sent to another person in ETO, click to select the second option and the same controls will appear plus a drop-down list box to select any Program with access to the TouchPoint and a similar drop-down list box to select any staff member with access to the TouchPoint.

Select the appropriate choices for each part of the control.

7. Click the "Save" button to complete the record.

Call Log (Report)



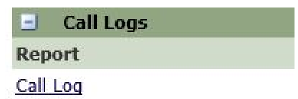
1. Select Reports | View Reports (New) from the Navigation Menu. The View Reports page will open.

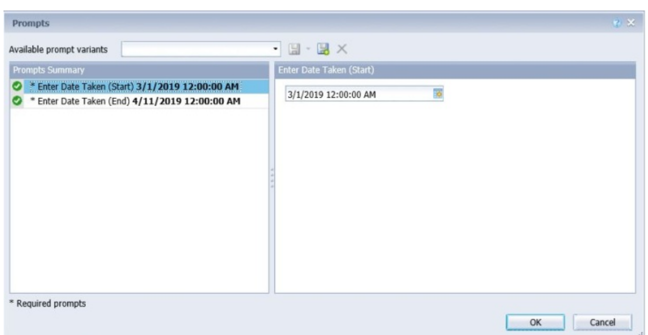
2. Locate the "Call Logs" category from the list. It should be the third category down, immediately following "BC Partner Reports".

3. Click on the expand icon [+] to the left of the Call Logs category. The category will expand and Call Log report should be visible to you.

4. If the report is not visible, click on the "Refresh Report List" button at the top of the page and expand the category again.

5. Click the link for the report *Call Log*. A new window will open for the SAP reporting software and load the Call Log report. This will take a few minutes to open and link to ETO to load the report. When complete, a modal window will appear, prompting you to select a date range for the "Date Taken" field at the beginning of the TouchPoint. The last used selections for each of these prompts will auto-populate for these filter questions.





6. The date controls in this window will be both date and time, but the time is not required. Enter a date directly in the control, or use the calendar tool to select the date range you want to use. You have to click to select each prompt in the left pane of the window to be able to enter the dates in the right pane.

7. Click the "OK" button at the bottom right of the window. The software will generate a sample report. A description of each field follows below.

8.

Recher, John

Date of Contact	Entity Name	Type of Contact	'Other' Type of Contact	Time Spent (Mins)	Purpose of Contact	'Other' Purpose of Contact	Notes
3/1/19	A to Z Cleaning & Supply LLC	Site Visit	sd	60	Other	Came in for estimate on carpet cleaning	Test entry...
3/1/19	A&B Cleaning and Environmental Services	In Person		60	Other	Prepare estimate for carpet cleaning	Test entry...
3/11/19	21st Century Learning Centers	Phone		15	Information		Test entry...Called to set up an appointment for a visit
3/25/19	A & H Private Investigation	In Person		30	FOC Orientation/ Tour		Test entry...Personnel came in for a tour of the FOC offices.

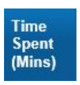
Staff Name: This is a section heading, sorted by last name, and all the TouchPoint records for each staff member taken within the requested date range will appear together under this section heading in order of date and time.

Date of Contact: This is the date entered in the field by the same name in the TouchPoint.

Entity Name: The name of the entity for which the contact record was recorded for. The field does not appear on the TouchPoint because it's selected before you even began the TouchPoint.

Type of Contact: The selection made for the field by the same name on the TouchPoint.

'Other' type of Contact: The answer given for the text box field "Other Type of Contact Details".

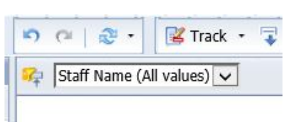


Time Spent (Mins): The amount of time specified in the "Time Spent (optional)" field on the TouchPoint. Currently, this will display in minutes, even if hours were specified in the TouchPoint answer.

Purpose of Contact: The selection made for the field by the same name on the TouchPoint.

'Other' Purpose of Contact: The answer given for the text box field "Describe 'Other' Purpose of Contact".

Notes: This is the key field in the report, showing the answer typed into the text box field of the same name on the TouchPoint.



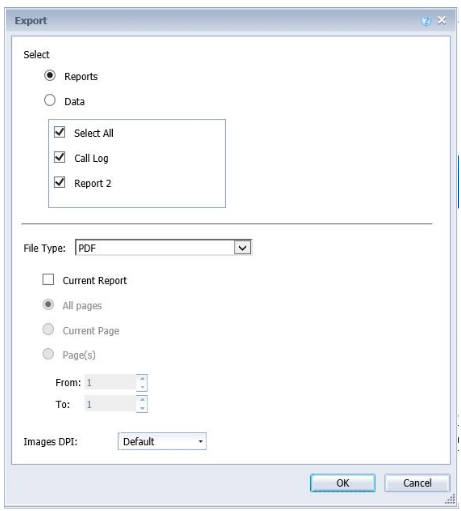
9. If you want to filter a report for printing for only one staff member there is a control at the very top left hand corner of the sample report that should say "Staff Name (All Values)". Click on the down arrow and a list of all the staff users who have a section of the report will appear. Select the one staff member you want to see the report of and it will filter out the rest.

10. If you need to change the date range because you're not seeing an entry you need, click on the Refresh Query button. The query

prompt modal window will re-open, allowing you to set different start and end dates.

11. Print Report: To print a copy of the call log, you *can* click the print  icon on the left side near the top. This will export the report to a PDF file that can be printed. Once a PDF file is generated, print that file to get a paper copy.

12. Export to PDF: The best way to generate a PDF version of the report is to click on the export button, also on the button ribbon at the top toward the left of center. The "Export" dialog window will open. 



The default for file type is PDF. Immediately below that list box, at the center of the window, click to select the check box for "Current Report", then click the "OK" button and a PDF file should be generated. Open the file to print.

13. Export to Excel File: You can also create an excel spreadsheet, both older (XLS) and newer versions (XLSX). Click the "Export" button and change the "File Type" to either of the Excel formats. Click to select the check box for "Current Report", and then click the "OK" button and an Excel file should be generated. Open the file to format cells and print.

14. Optionally, you can export to a text file (TXT) or a 'comma delineated' file (CSV), in the same manner, though neither is recommended and require extra work to use.

Index