Reports in ETO

Battle Creek Community-Wide Non-Profit Database

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Contents

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Introduction

Recorded data is of little use unless that data can be viewed in a manner that has meaning to the user. With proper reports, users can interpret the data in a dataset, and use it to improve delivery of services as well as provide required performance data to funders. ETO provides a powerful tool to create and run reports to interpret the data we enter into it.

At the most basic level, anything recorded into ETO can be reported on, and much more besides. The downside for frontline users is that using reports can be intimidating and appears—at least at first—to be very complicated. However, as with anything in ETO, once you use it regularly it becomes much easier.

The most difficult thing about running reports is keeping straight what each report on your list displays. Although the report names are intended to reflect their purpose, reports sometimes evolve until their purpose is completely different from the original, and the name may not match anymore. The important thing to remember is the report list is filtered by the program you are logged into, and by your reporting role, so what you see is a smaller portion of the reports that are available.

You also have the ability and option to save a version of any report into a list of your own, personal, favorites, so those you find particularly helpful or necessary for you can be set in a list easy for you to manage. You can then name them anything you want, and manage them yourself. However, you are not able to delete reports you no longer need from your favorites list, nor the auto-saved reports that will appear if you leave a report open too long [*more on this later*]. If you do need reports deleted, it can be done, but requires a request to tier 1 support at Social Solutions.

Other key reports can be run from custom links on the Participant dashboards, or other dashboards in ETO, and within reports we can place links to open other reports, and even open TouchPoint forms to either update an existing TouchPoint record or start a new one.

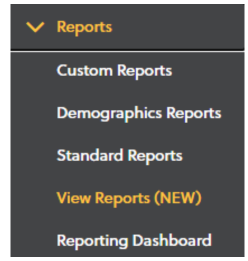
It’s normal for most users to believe reports hold no benefit for them, or that they are too difficult to work with to be worth the bother, but that’s the purpose of this chapter; to make it clear and simple enough to use often, as well as to see there is value in making use of them.

One thing you, as a user, do not have access to do is create or modify reports. This must be done at an administrative level by one of the system administrators. However, this is also a simple thing to do—all you need to do is make a request of the admin, either by phone or email, and it will be done as close as possible to what you need.

This chapter will be different from most of the other chapters, particularly those covering TouchPoints, as it will not have an explanatory section followed by a step-by-step section. It will, instead, simply explain the different parts and functions of the reporting application.

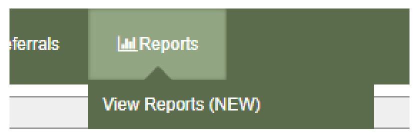
View Reports

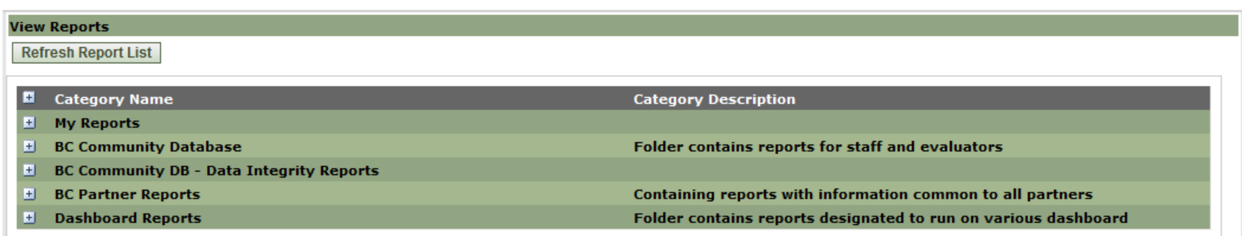
The easiest way to access existing reports is through the **View Reports** page, and there are two ways to access it: The Navigation Menu on the left side of the screen and the Dashboard menu on your staff dashboard.



If the Navigation Menu is not already open, click on the hamburger menu icon in the upper left corner of the ETO window to make the menu appear on the left side of the screen. Once the menu opens, click on "Reports" at the bottom of the menu, then select "View Reports (New)", and ETO will switch to the **View Reports** page.

An easier alternative, especially if the Navigation Menu is collapsed by default, is to use the dashboard menu at the top of the ETO window, immediately below the QuickSearch bar. The menu only appears on your staff dashboard, so if it's not visible you can make it so by switching to your personal dashboard—click on the dashboard icon immediately to the right of the hamburger menu and the menu should be visible at the top. "Reports" is the last item on the menu bar and "View Reports (New)" is the only item on that menu. Click on that link and ETO will switch to the **View Reports** page.





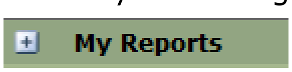
View Reports

Refresh Report List

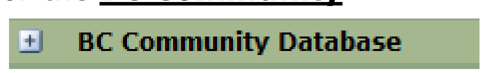
Category Name	Category Description
My Reports	
BC Community Database	Folder contains reports for staff and evaluators
BC Community DB - Data Integrity Reports	
BC Partner Reports	Containing reports with information common to all partners
Dashboard Reports	Folder contains reports designated to run on various dashboard

On the **View Reports** page, you will see two columns, one a list of categories—or folders—and the other a brief description of the categories.

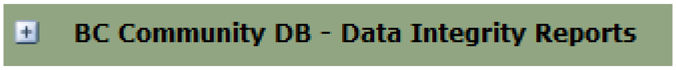
The very first category on your list should be **My Reports**. Once you learn how to and begin saving favorite reports, you will find them in this location.



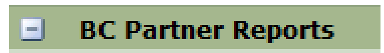
Most of the custom-built reports built especially for the **BC Community Access** site are put into the **BC Community Database** folder, second on the list.



The third category, **BC Community DB - Data Integrity Reports**, holds a collection of custom-built reports that are scheduled to run on the first day of every month and are automatically emailed to the data stewards (staff members responsible for the accuracy and completeness of data in ETO) for each agency. These reports are meant to show TouchPoint and demographic records with missing data that should be corrected, as well as some of the potential errors that have been made during entry. Even though they are scheduled to run automatically, and are designated for one specific staff member at your agency, does not mean you cannot run them at any time if you want to see how you and your agency are doing.



Next is a category that was intended to hold reports designed for use by all of the Partner Agencies, **BC Partner Reports**, though almost every report is put into the general **BC Community Database** folder by default.



Last is a folder that simply holds the **Dashboard Reports** and keeps them separate from the others for the administrator's convenience. While you can run these reports from this page, it isn't recommended or necessary to do so and it will only return results from the last time the report was run. There are links for these reports on the Participant Dashboards and will automatically return results specific to the Participant whose dashboard you are viewing. This chapter will cover these in detail later.

Custom reports have to be built and made available to users by an administrator. That may seem like common sense, but the issue is that permissions have to be programmed into the report to allow users access based on programs they have access to and their security level. Then the administrator has to place the reports into one of the categories—except for the **My Reports** folder on your reports page which no one but you can access—usually in **BC Community Database**.

This, however, does not make them automatically available—or visible—to you. To see and access new reports, you have to *refresh* your report list. In the upper left corner of the page is a button, "Refresh Report List", that does exactly that. It's good practice to click that button every time you go to the **View Reports** page to establish the habit. It's the most often forgotten thing in ETO with new users, and

Best Practice: *It is good practice to make habit of hitting the "Refresh Report List" whenever you go to the **View Reports** page so you can see any new reports an administrator may have built and placed there.*

establishing the habit will save you the embarrassment of having to contact an administrator when a report you requested doesn't seem to be available to you.

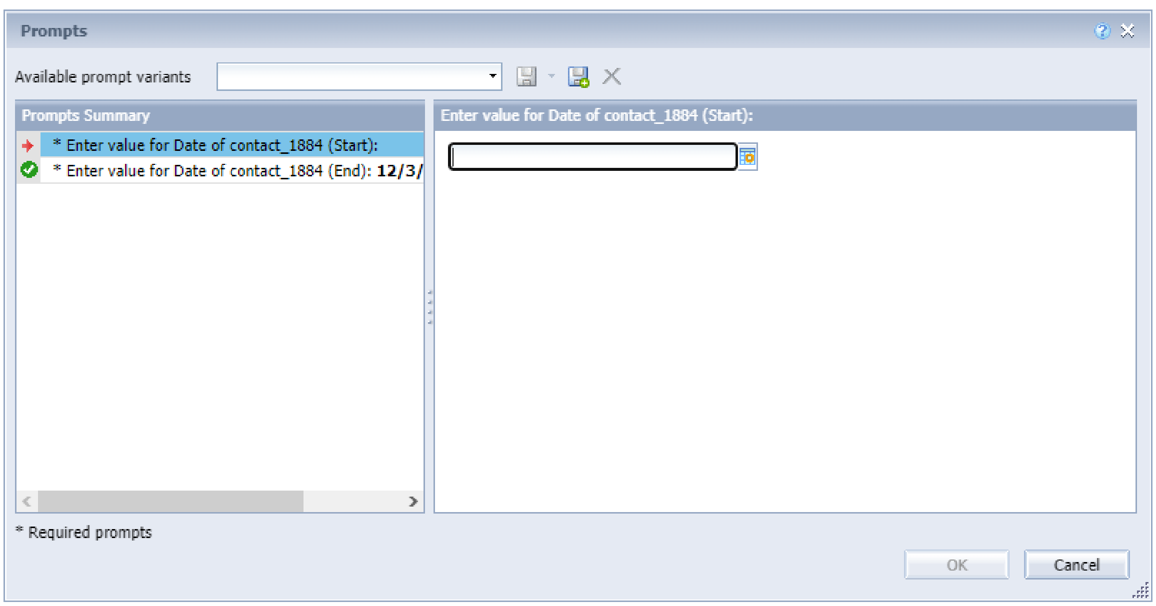
Accessing and Running Reports from the View Reports Page

The category folders are collapsed by default, so all you can see at first are the category names. To open a folder, click on the plus symbol to the left of the category name. You can also click the same symbol on the header next to the heading "Category Name" to open or collapse all the folders at once.

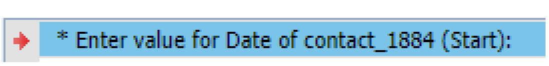
Once you've opened a folder, all the reports residing inside will appear by their titles and, sometimes, a description in a second column. The report names are hyperlinks and to open a report you simply click once on the report name.

The report will open in a new, separate, browser window. The reporting software is a third-party browser-based application that works well with ETO and is remarkably powerful.

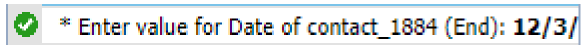
If prompts have been built into the underlying queries a dialog box will open over the report window asking for the prompted search criteria.



In most cases, the report will remember the last used search parameters and pre-populate the fields in the dialog box with them. Some of these prompts may be required while others may not. If the field is required and nothing

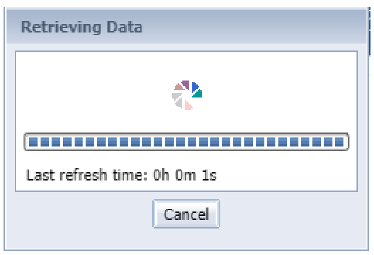


has been entered yet, a red arrow will appear to the left of the prompt name in the Prompts Summary pane on the left. If it's not required or an acceptable value has been entered in the value box on the right, then a



green circle with a white check mark will appear in the same place. Once you enter prompted values into the boxes and click on "OK", the query will execute. Note that dates do not need the time, though they appear as Date/Time fields. If you enter just a date, it will assume the time as Midnight and include the entire day.

There might also be a list of choices to select from, if this type of prompt was designed into the report, such as the site (there are three choices) name, or program. You can normally select more than one at a time, by either double clicking the option or highlighting it and clicking the arrow to send it to the list of selections.



The query run time depends on the complexity of the queries and the amount of data being requested and searched through. It may take only a few seconds, or may take as much as five to ten minutes. A modal window will pop up advising the data is being retrieved. At the bottom of that modal a line of text appears that tells you how long that query took the last time it ran.

Connection Complications with Reporting Software

Because the reporting software is third-party, it's not running inside ETO but has to maintain a connection to it, kind of like an old-fashioned phone connected to the phone network by a wire plugged into the wall. If that wire comes unplugged, the phone stops working, having lost its connection to the network, though it may appear nothing has changed. Unfortunately, if there is not consistent activity between ETO and the reporting software through that connection over a relatively short period of time, the connection will be lost and—though it appears to working—the report will stop functioning.

This means that you won't be able to save the report if left unattended for more than a few minutes, and if you don't execute the query within a minute or so of opening the application, it will just sit and spin. It *appears* to be running the query, but nothing actually happens. In most cases, it won't give you an error message of any kind, it will just sit with the "Retrieving Data" modal window open and the color wheel spinning, but won't be able to actually retrieve any data because its connection to ETO has been lost.

This can be very frustrating, especially when you don't expect it and don't know what's happening. Once you've worked with it for a while, you can predict when it's going to happen and learn to avoid it. It's also gotten much better with the most recent releases. Best practice is to run reports only when you can complete what you need to do without interruptions. If you find the software is unresponsive, or your mouse pointer is stuck in its "busy" form, try just closing the report and running it again. Most of the time, that will refresh the connection between the two applications and everything will work again. In some cases, when the report has been left open for a very long time without activity, the connection is broken in such a way you will have to log out of ETO and back in again. You'll know this has happened when an SAP Software modal window opens asking you to login to that program. You cannot log into the SAP reporting software directly, even though it's asking you to, which is why you must log out of and back into ETO to establish the connection. The SAP reporting application gets its login information directly from ETO.

Best Practice: *Only open a report when you have time to complete your work without interruptions. This will maintain the connection between ETO and the reporting software and allow you to complete the work without any problems.*

Don't let this intimidate you, though. It's not as bad or as complicated as it seems, and forewarned is forearmed. Knowing what to expect and, more importantly, why it's doing unexpected things, then you will be empowered to overcome them.

Also, knowing this is a problem, ETO recently added an enhancement—though sometimes it seems to be more of a complication—that autosaves a *copy* of the report in your personal favorites (**My Reports**) folder. This is of little or no value to frontline users, and is intended to help administrators who build and modify reports. Before the enhancement, one could spend hours working on a report just to lose all that work because the connection with ETO was lost. Frontline users do not have the access to make changes, other than formatting changes—which are not recommended—to the reports.

Using the Report Application

Just looking at the report application window can be intimidating to some of us. There are several buttons and panes that have no apparent correlation to things you are used to and comfortable with, other than perhaps the "Save" button with the little diskette icon.

Although there are only one or two buttons or commands that you will probably use, we'll cover every piece of the application a little later. Fortunately, to begin with, the report has already been built and, once the query executes, the application will display the report for you in the main part of the window. That's usually all you will want to do.

Application Components

We've already covered the Prompts dialog box pretty completely. Just know that you may be prompted for nearly anything, depending on what the report was created to show. Most often it will be a date range, perhaps the range of dates for program enrollments, or dates during which a TouchPoint may have been taken. Sometimes it may be only one date, intending to search for all data before or after that date, rather than a range. Or it may be a program name—in which case a set of options will be provided that you can select from rather than having to type out the name—or Participant status. Normally, the prompt itself will adequately inform you what it needs, but sometimes it may not be clear. When it's not, contact the administrator for clarification.

Report Pane

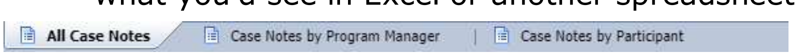
First and most obvious is the Report Pane, the largest portion of the window, and showing, hopefully, a table of data that meets the criteria you entered into the prompts dialog.

In the bottom right corner of the Report Pane is a set of arrows pointing up, down, left and right. Clicking on these arrows will make the report scroll, or rather *step*, in the direction of that arrow. If the arrow is usable, it will appear blue, meaning the report is capable of scrolling in that direction. Normally this will only be up or down, as most reports are not wide enough to need scrolling to the left or right.

However, when the reports are wider than can fit on a page, it can be helpful to use these arrows, though there are other ways to move the report on the screen that you may find more useful.

Report Tabs

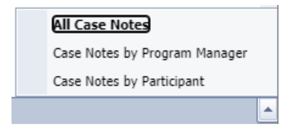
Along the bottom of the Report Pane you will see one or more tabs, similar to what you'd see in Excel or another spreadsheet program, representing sub-



reports built into the document. You can navigate between those reports by clicking on the tabs, or by a few other methods that will be explained as we come across them. The report will not necessarily open into the first tab, but will remember the last tab open when it was saved last and go to that tab instead. Fair warning, some reports have more sub-reports than can show at once in the Report

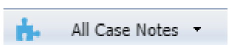
Pane, and it can be difficult to get to the ones off the screen until you learn a few tricks.

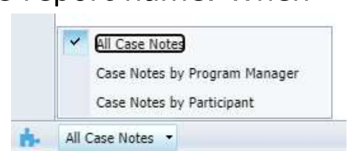
On the extreme right end of the tab bar, immediately below the vertical scroll bar, is a small button with an UP arrow. Click on this button and a list of all the sub-reports will pop up immediately above and the left of it, with the current report highlighted. When there are a lot of sub-reports, this is one of the easiest ways to navigate between them. You can jump immediately to the report you want to see, even if the tab is not visible on the screen, by clicking on that report name in the window. *You should be aware that the functionality of these shorcuts sometimes vary from browser to brower.*



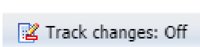
Status Bar

Below the tab bar, at the very bottom of the screen, is the status bar. Though it may not look like much, the status bar contains a number of important features. First, on the left side, is another way to access a list of sub-reports and navigate between them. Look for a small icon that looks like a jigsaw puzzle piece, and right next to it is the name of the current report shown. It doesn't look like it, but this is a button. Notice the little DOWN arrow to the right of the report name. When you click that button, a box will appear directly above it with the names of all the sub-reports listed and the current report both highlighted and with a check mark next to it. You can, again, click on any report in this list to jump from one sub-report to another.

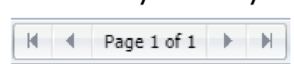




On the other end of the status bar is group of other controls, beginning with "Track Changes". This is not a feature we use at the present time, and Social Solutions has not provided documentation on it. However, we may begin to use it in the future. Either way, it's not something that non-admin users can change or use.

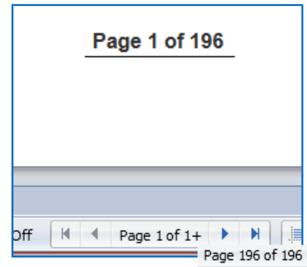


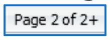
Next is a set of navigation controls. These work very similar to what you may be familiar with in ETO. The buttons are as follows:



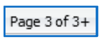
First Page button
Previous Page button
Current Page and Number of Pages Page 1 of 1
(more on this in a moment)
Next Page button
Last Page button

Somewhat important to note right from the start is the status bar doesn't know how many pages there are in a report until it's actually *displayed* them, and when you first go to a report it will *always* say, "Page 1 of 1+" (the plus symbol indicates there is more than 1 page), unless there is only one page to the report. In this illustration, notice that the report itself—displayed right above the status line for this illustration—says there are 196 pages, while the status bar still says, "Page 1 of 1+". If you step through the pages with the Next Page button, it will next say

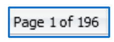




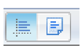
"Page 2 of 2+", then "Page 3 of 3+", until you reach the end. Or, if



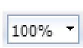
you click the Last Page button, it will then say "Page 196 of 196" (notice it no longer has the + symbol indicating "more than") and from that point on *remember* that there are 196 pages. So, if you then go back to the first page, it will now say "Page 1 of 196".



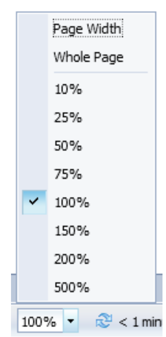
Next on the status bar is a pair of buttons indicating and allowing you to switch between the two view modes. The default, and first button, is the "Quick Display Mode". While this mode does appear to show the data in



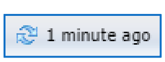
pages, there is virtually no limit to the width it can display and the vertical is many times more than the other mode, "Page Mode". In the report from the above illustration, Page Mode shows 196 pages (and would print out to the same), while the Quick Display Mode says there are only 17 pages, almost 1/12th the number. Both modes have their uses. If you just want to see data, the Quick Display Mode will show you everything, but with the Page Mode you can see what it will look like printed out on paper.



Next is the Zoom level. This defaults to 100%, but you can change it to any of a number of choices from 10% to 500%, with other options of "Page Width" and "Whole Page". These enlarge or shrink only the report displayed in the Report Pane and, thankfully, do not affect any of the other parts of the application window.



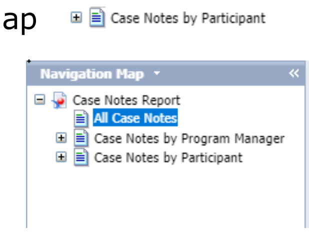
Finally, is one of a several Refresh controls. What this does is force the



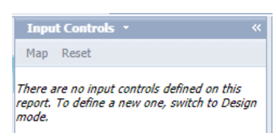
application to re-run the query or queries behind the report. If there are prompts, the Prompt dialog box will appear again, requiring the input parameters to be entered again—or accept the last entered parameters. Next to it is a real-time count of how long it's been since the last refresh. Refreshing the report can be very useful at times, and you should always be aware of the icon for *Refresh*, the two blue arrows seeming to chase each other in a circle…

Application Control Bar

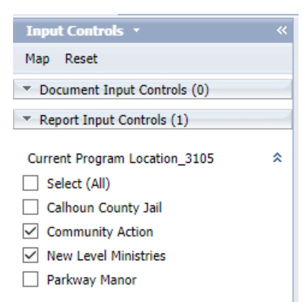
The vertical bar along the left side of the window contains three buttons that control what you see in the side panel just to the right of it. By default, the last button selected from a previous report is selected.



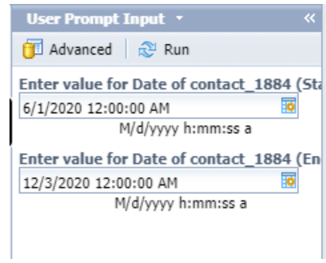
The top button, *Navigation Map*, makes the navigation map display in the side panel. For an administrator, this is a pretty useful thing, as it allows us to insert a separate filter for a specific sub-report—or view and modify an existing filter for any one sub-report. At the very top is the title of the report, matching the title/hyperlink you clicked to open the report. Below that are listed each of the sub-reports, matching the tabs below the report. This is also another way to switch between the sub-reports…If you click on any sub-report title, the report will appear in the Report Pane. If you see a little plus symbol inside a tiny box (expand icon) next to the report, that means there are one or more filters tied to that report. When you click on the expand icon, a list of all available choices will appear in the Navigation Map below the sub-report name. If this includes Participants, this list can be very long, and if there is a filter bar in the report (more on this later), the choices will be limited by what has been selected in the filter bar's control.

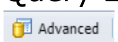


The next button down, *Input Controls*, will appear and function whether there are Input Controls in the report or not. If there is no Input Control in the report at all, a simple message telling you this will display in the Side Panel. One of the tools administrators have at their disposal, however, is this control that allows you to filter on any combination of options for the selected field. For example, if the field being filtered has something to do with the various programs, you can select Michigan WORKS! *and* KCC at the same time, resulting in a dataset the matches both programs. Or you can select Goodwill and Woman's Co-Op, or three different programs, or even just one. This feature gives you complete control over that field and its filter. In this illustrated example, the various HUB sites are the field being filtered, and with this control a report can be produced that shows all the resulting records from any combination of those sites. There are not many reports using this feature at the present time because of the difficulty in training users to find and utilize the controls. Hopefully, this document will rectify this.



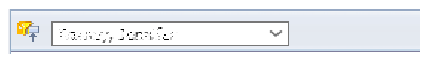
Last is the *User Prompt Input* button. This brings up a dialog box with the user prompts, if any, entered when the report first opened. This allows you to review the criteria you entered so you know exactly what the report is supposed to show. This can come in handy—if the data doesn't look like what you expected, you can make sure you entered the correct parameters. You can also change those parameters from right here, if you want or need to, by simply entering new information in the boxes and either hitting the <Enter> key or clicking on "Run". The "Advanced" button is primarily for administrators and, for them, will open the Query Editor so they can review or alter the queries. For end users, this will simply open the prompt dialog box again.

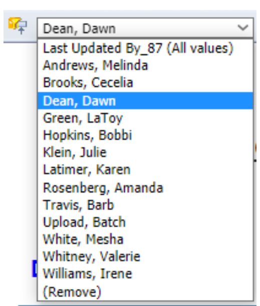




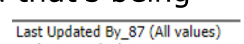
Filter Bar

Another, much more common, tool is the Filter Bar located at the very top of the Report Pane. One or more user-defined filters can be put on this bar to give you more control over the dataset. Normally, these filters are placed there by the administrator that built the report, but—if you are comfortable with doing it—you can place new filters on the bar yourself, or remove the ones that are there (though this is not necessary as you can nullify the filter by selecting "All Values" at the top of the dropdown list).

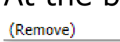




Most of the time you are going to just use what's already been built into the report. Click on the dropdown list box and a list of choices will appear. Note that these choices do not match all the possible options in ETO, but only those that appear in the report and match the input criteria. At the top of the list is the name of the field that's being filtered with the words "All values" in parentheses. Selecting that option basically cancels out the filter and shows, well, All Values.

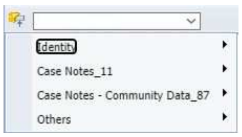


At the bottom of the list is "(Remove)". If you select this, the control will disappear completely. Best not to ever select this choice.

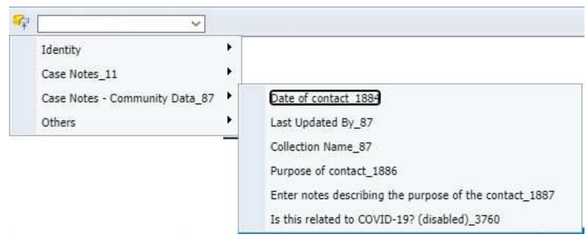


Select from any of the other choices and that sub-report will return a dataset that matches.

If you want to attempt to add a filter control yourself, the only thing you should find difficult is knowing what the field names mean. Though most of the time they should be self-explanatory, the field names are system names from the ETO database and won't match exactly with the columns or other fields on the report page. To add a new control, click the *Insert Simple Report Filter* button on the extreme left end of the filter bar (if a filter 



already exists, it will be just to the left of that control). When you click on the button, a dropdown list will appear showing the different types of data from the underlying query. They normally will include "Identity", which has the name and ID number of the Participant, the names of any TouchPoints included in the query, and a catch-all group called simply "Others" (normally containing demographic data). If you click on, or even hover over, the black right-arrows on the right side of the list, another drop down will appear to the right of this one showing the fields within that grouping. Select the field name that best fits the report column you want to filter on from the list, and it will appear on the filter bar. If a filter control already exists on the bar, the new one will appear right next to it. This means, of course, you can have more than one filter control at the same time, though if one already exists, the field name will not appear in the available fields in the dropdown list.



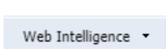
If you do create a new control and you want to keep it, you will need to save a copy of the report in your own favorites folder. More on this, shortly.

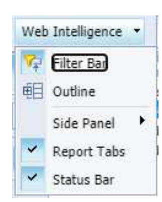
Command Bar

At the very top of the application window is the *Command Bar*. The number and variety of buttons on the Command Bar depends on whether you are in the Read Mode or Design Mode. Reports always open in Read Mode and, though you will have access to switch to Design Mode, most of the functions in Design are grayed out and inaccessible to frontline users. However, there are still some important commands on this bar that are useful for you to know. We'll discuss of them here, and you can decide which ones may be useful.

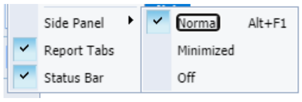
Web Intelligence

The first button, *Web Intelligence*, is *not* tremendously useful, but we'll cover what it does just so you can know. This button simply activates a dropdown menu with an odd assortment of mostly View commands. If you click on the button a dropdown menu appears showing "Filter Bar", "Outline", "Side Panel", "Report Tabs" and "Status Bar".





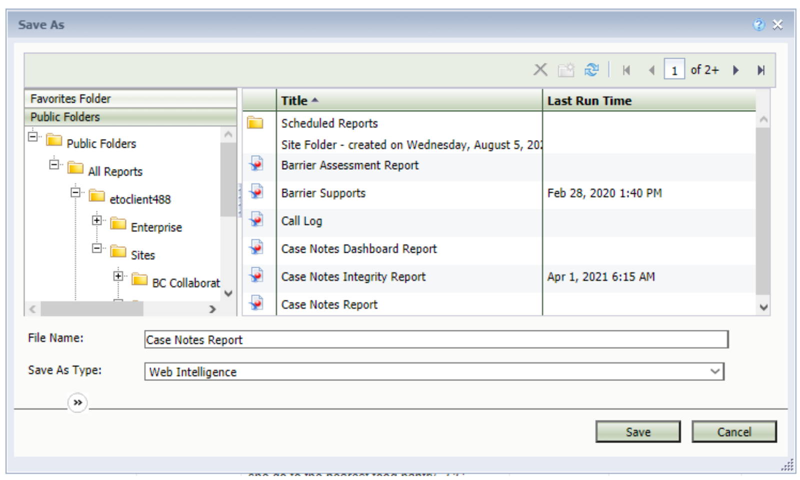
Filter Bar turns the Filter Bar on and off. *Outline* does not appear to do anything except lock up the application (in other words, don't select it).



Side Panel opens a second-level menu to control the appearance of the side panel. *Normal* is the default and makes the Application Control Bar and the side panel visible, *Minimized* hides the Side Panel but leaves the Application Control Bar visible, and *Off* hides both the Side Panel and Application Control Bar. If you make them go away, whether by accident or intent, there's no need to panic as you can always bring them back by clicking the *Web Intelligence* button, then selecting *Side Panel* and then *Normal*. Or, if you remember, you can use the keyboard combination of <Alt>+<F1> to bring them back.

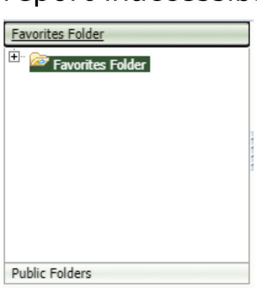
Report Tabs and *Status Bar* hides and shows those two bars in the window. The purpose for hiding these bars and the Side Panel is to make the Report Pane bigger and allow you to display more of the report on your screen. This is the only time these commands will be of benefit to you, when you need to see more of the report without making it smaller.

Save



The *Save* button opens a "Save As" dialog box. As a frontline user you do not have access to save modifications to existing reports, so the command will, instead, redirect you to Save As to create an altogether new document in your favorites (**My Reports**) folder.

If you choose to do this, the software will, unfortunately, want to save it in the same folder as the original report is in. Saving it there will make the report inaccessible to you, though, so it's important that you change the folder to favorites where you *will* be able to see and use it. All you need to do it click on the little bar at the top of directory pane that says "Favorites Folder". It doesn't look like it's supposed to do anything, but it does. Click there and the directory will shift down from the public folders—as shown in the graphic above—into your own, personal, favorites folder. Then, you can change the report name, if



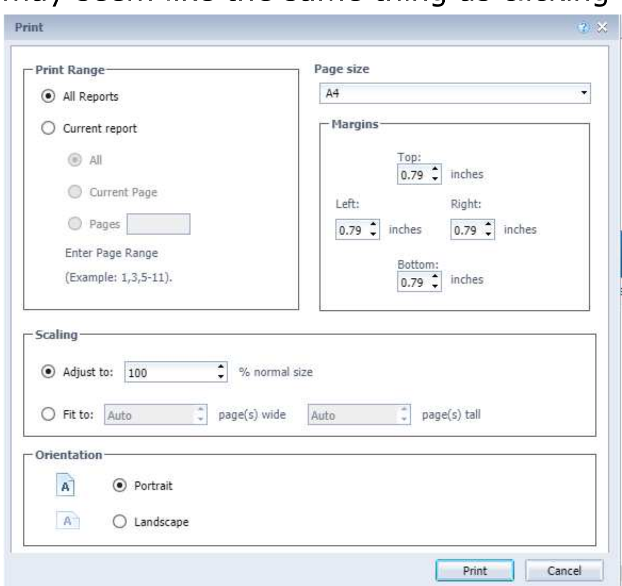
desired, in the "File Name" box (do not change the Save As Type), and click the "Save" button. Once you hit the "Refresh Report List" button on the **View Reports** page, it will be visible to you in your **My Reports** folder.

Print

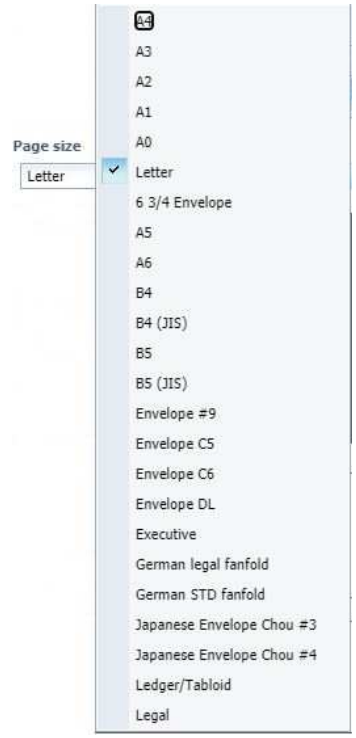
The Print command has been dramatically improved in recent years, but I still do not use it, though mostly out of habit. What this command will do is output only to a PDF file, which you can then print out on paper with another program.

There are two options with its use. First, you can just click on the main part of the printer icon and it will immediately bring up a Save dialog box prompting you to name the PDF file and select a folder for it. *If you have your browser set to automatically download files without saving, it may just do so and auto-name the file based on the report name.* Ether way, most browsers will then present the new file to you and allow you to open it or ignore it for now. You can select the file at that point and open it in whatever program your computer is set up to use for PDF files.

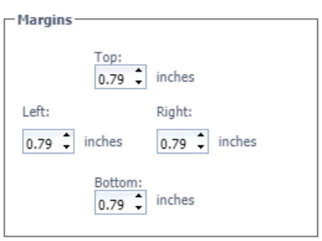
Alternatively, you can click the down-arrow on the right side of the button and a single command menu will appear: *Print*. While this may seem like the same thing as clicking the icon, it actually allows you a little bit more control over the process. When you click on that Print command on this menu, a *different* dialog box will appear that will allow you to make a few formatting changes to the overall document.



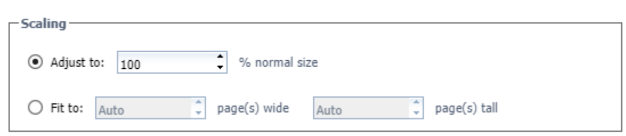
In the first, upper left, part of the box—*Print Range*—you have slight control over which parts of the document will be included in the PDF. By default, "All Reports" is selected, which will, of course, cause every page of every sub-report to be part of the PDF file. You also have the option of selecting just the "Current report"—or the tab you currently have open—to be output to the PDF file. If you select "Current report", then you can further limit the output by selecting "Current Page"; or "Pages" will allow you to select specific pages (having the document in Page View and noting the page number in the Report Pane can help you with this).



At the top right side of the dialog box is a *Paper Size* selection list. By default, SAP formats all documents to the European standard A4 size, and if the administrator building the report does not change it then that size is locked in. It's important to note that the PDF will retain whatever choice is made, and this *may* be a problem with whatever printer you send the PDF to. Surprisingly, though it is a very common size worldwide, many printers have a problem printing a document formatted to A4 paper size, and have to be manually overridden. That's because, though close, A4 is *slightly* different in size to the American *Letter* size of 8.5 by 11 inches. A4 is 210mm by 297mm, or 8.3 by 11.7 inches. All that to advise, it may be helpful, if it doesn't already indicate either "Letter" (8.5x11 inches) or "Legal" (8.5x14 inches), that you select one of the two from the list. Another, somewhat common, paper size in the U.S. is *Ledger* (11x17 inches) and so you can also select "Ledger/Tabloid" from this list if you need a larger paper to output to. Curiously, it's called Ledger when in the Portrait configuration, but Tabloid when laid on its side in the Landscape position.



In the next section down on the right side, you can change the margins if you find the formatting of the document makes it print just a little bit too far to the right of the page. Oddly, though the software uses European standard paper sizes by default, it uses inches here to set the margins. By resetting the margins, you can gain yourself an inch or more in either direction, and make more of the document fit on the page.



Below that, in the middle of the dialog box, is the section for *Scaling*. Again, if the document is not grossly too large to print normally, you can adjust the scale to make it work. You can reduce—or enlarge—the document by lowering or raising the "% of normal size" value in the first control. Experience helps here, and you may need to do some experimenting to get it to work well for you. You can also select the lower option and make it adjust itself to fit the page. If you do, it's recommended you leave it on "Auto" rather than trying to change the number of pages.

Finally, the last section is to select an *Orientation*. If the report was designed to be printed on paper, it's probably already set to print in the right orientation, but if it's not, then you can quickly and easily change it here just by selecting the other radio button.

Although there are many options you can set on this page, you don't have to set them all and can go with the default choices, but it's good to know you can make some changes to the output if you need to.

When you're ready, click on the "Print" button at the bottom of the dialog box to make the file save dialog open. Select your destination folder, if your browser settings haven't already saved to a default download folder, and save the file. Your browser will then allow you to open the new PDF file to view or print hardcopy.

Search

One underused and yet rather useful tool is the *Search* function. Click the Search button on the Command Bar and a new function bar, the Search Bar, will appear at the very bottom of the Report Pane. This can be very useful if you know, for

instance, that you wrote something specific in a Case Note for one or your Participants and you don't remember when and don't want to skim through every one of dozens of Case Notes to find it. Just run the Case Notes Report for that Participant and use this function to find every instance of a key word or other character string in the report.

To use it, enter the character string you want to find in the first box and hit <Enter>. If the string is not in the report anywhere, the search criteria you

entered will turn red and a flag will appear saying no match was found. If matches are found, all the matches will become

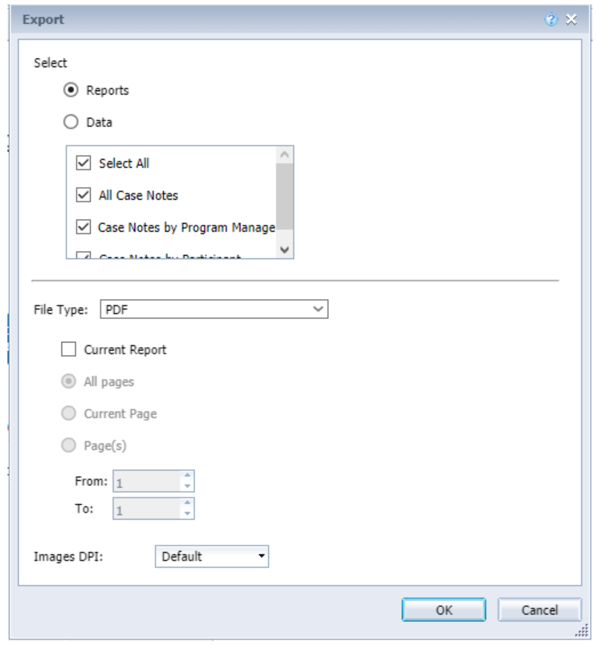
highlighted in the report and the search bar will advise it found matches. While the <Enter> key works the first time, to see more matches you will have to click on the "Find Next" button (or click the binoculars icon to the right of the search box) to step through all the matches on the page. Of course, you can also click on "Find Previous" to go backwards.

One caveat…It will only search the current page, so if you have a large report with multiple pages, you will have to manually change pages and search again.

To close the Search Bar, click on the x icon hiding at the extreme right end of the bar.

History

History is an admin function and should not be available to you. It shows a list of dates and times a scheduled report—like the data integrity reports—have been run.

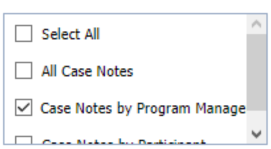


Export

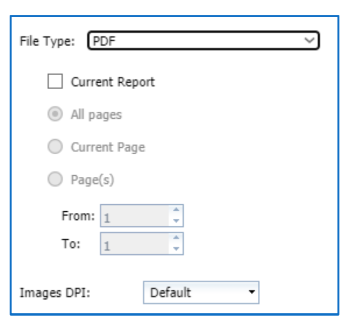
This will be the button you will probably use the most. *Export* allows you to save the report in any one of several different file types and gives you much more control over the output. You can export to a PDF file, one of two Excel file formats (.xls and .xlsx), a CSV (Comma Separated Values), or plain text. When you click the button, another dialog box will appear, offering you a wealth of options. It's good to know what these options do.

First, at the top, is the *Select* section. By default, "Reports" is pre-selected. The "Data" option only allows you to download data in a CSV format, giving you the ability to select Text Qualifier, Column Delimiter, and Character Set, and outputs the result of the underlying query or queries. Frankly, there's not much use in exporting the data this way.

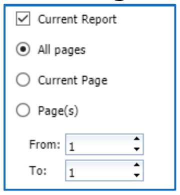
Below that is a list of the sub-reports in an option list box. You can Select All (the default setting) by checking that first box, or uncheck it to clear them so you can select one or more of the others without having to export them all. This can be extremely useful!



The bottom half of the dialog box is where you select the output file format. If you merely want to print it out, or even to save a copy in a final print format, you should select PDF. When you select PDF there is a nifty option I wish the others offered as well, the ability to select just the "Current Report". When you select that little checkbox, it makes the report selection above moot and saves you from having to uncheck the "All Reports" box and sifting through the list to find the



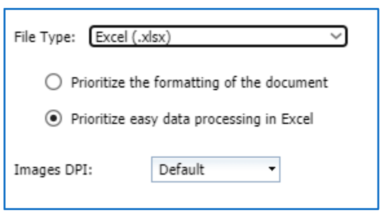
one you want—especially if there is a really long list of sub-reports—and checking that box. This control bypasses all that and exports only the sub-



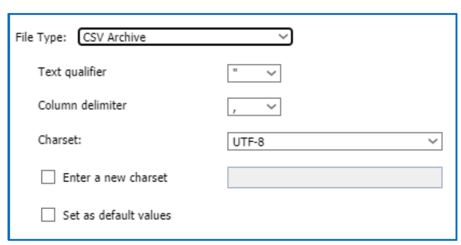
report you have open to view. It also activates—and is the only way to activate—the page selection controls below it, where you can select to print “All pages”, “Current Page”, or a specific page range with “Page(s)”. Finally, at the bottom, is a setting to control the resolution of the output file in

Dots Per Inch (DPI). You’re best off keeping the default setting as this affects the file size more than anything and you won’t notice a difference otherwise.

The most useful export option is to output to an Excel file. There are two choices for this: .xls and .xlsx. The first choice, .xls, is for Excel 97 and earlier, though you can open it in newer versions of Excel as well as other spreadsheet applications such as OpenOffice or LibreOffice Calc, or even Google Sheets. The other option is becoming more and more the

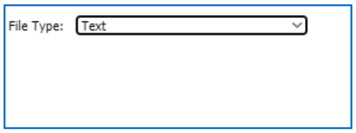


standard, .xlsx cannot be opened in older versions of Excel (97 and earlier), though it can be opened with OpenOffice and LibreOffice Calc, or Google Sheets. The only real setting with this is the option group “Prioritize the formatting of the document” and “Prioritize easy data processing in Excel”. For some reason, the second choice is the default though it’s unnecessary, and it often remembers the last choice made before it was saved. If there are cells at the bottom of the report showing page numbers, refresh date, counts, or other calculations, some or all of them will be lost if you select “Prioritize easy data processing in Excel”. If you want one or more of those special cells (most often the refresh date), you should select “Prioritize the formatting of the document”. Why the “Images DPI” control is on this section for Excel is a mystery, as it will have zero effect on an Excel file.



The other two choices are less useful or commonly used, but we’ll discuss them just so you know what those options are. If you select CSV file, it will create a compressed ZIP file archive containing a separate CSV file for each of the sub-reports. If you have Excel on your computer, or any other spreadsheet program, it will show as a “Microsoft Excel Comma Separated Values file” and has the same settings options as the Data output selection at the top of the dialog box. These files are, frankly, ugly and relatively hard to work with. You're much better off exporting to Excel, even if you don't have Excel, and opening it in whatever spreadsheet program you do have.

The last choice, *Text*, is even worse. You get no options with this file type



because there are no options to set. This will output to a .txt file with a line for each row of the original report. It's even uglier than a CSV file and much harder to work with, much less read. Again, best to use either PDF or Excel file types to export.

Once you have your choices set, click "OK" and a Save As dialog box will open. Set the file name and location, and click Save, then your browser will offer the downloaded file to open, view, or print; or you can use a file explorer to open the file later.

Send To…

This feature in not available and will always be grayed out. To send a report by email you will have to export it to a usable format and attach it to an email. It should be noted, if you want to sent only a few cells of data to someone by email you can export to Excel, copy the cells you want, and paste them directly into an email. This is not recommended for large sets of data, but for a dozen lines or less it can be quite useful.

Undo

This is mostly helpful to administrators building reports, but sometimes you may make a mistake that messes up the report drastically, or you may try something temporarily. Not to fear…click the *Undo* button and it will go away. You can even do multiple levels of Undo, not just the last thing you did, to go back several steps. You're supposed to also be able to use the Windows key combination <Ctrl>+Z to undo actions, but (though it may have been fixed in newer versions of the software, I've found it to do unexpected things and for it to be safer to click the button.

Redo

If you either Undo something and you want to take it back, or you just want to do something again, you can use the *Redo* command by clicking on this button. The button will appear grayed out if there is nothing in the memory for it to Redo. Again, the Windows key combination <Ctrl>+Y is supposed to work as well, but remains doubtful.

Refresh

Here is the last of the *Refresh* command locations, and the one most people use more frequently because of its convenient location. Click the Refresh button and the underlying query or queries will run again. If there are user prompts, that dialog box will also open again and require the selection criteria.

Track

This button does the same thing as the one on the bottom of the page, on the Status Bar. We're not currently using the feature and have no plans to in the near future.

Drill

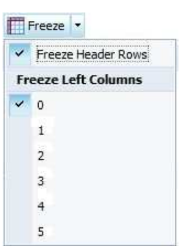
This function turns the data table in the report into a pivot table, similar to what you can do with Excel. If you know how to use pivot tables in Excel, this may be of use to you as well, but it is an advanced feature with little benefit.

Filter Bar

This button turns the *Filter Bar* on and off. If there is a filter control on the Filter Bar and you turn it off, either accidentally or on purpose, it will not lose the filter control. When you turn it back on, the filter will still be there. Although it highlights in blue when it is on, you can more easily see that it is on because the Filter Bar is visible. See the Filter Bar section of this chapter on page 12 to see how to use it.

Freeze

The *Freeze* Command can be a useful tool when a data table is very large, either with a large number of rows or so many columns it goes way off the right side of the screen. It's similar to the same command in Excel, but can be difficult to figure out how to use it. In almost all cases, the button will be grayed out, making it an invalid command. To use it, click in any cell on the report—one of the cells in a table header is best—and the button should go from gray to a nice color version, meaning it is active. Click on the button and a dropdown menu will appear.

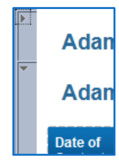


Whatever column the cell you selected is in will automatically be selected as the number of columns to freeze, and that section will be highlighted on the menu. If you want the header to freeze, so you always know what the columns are when you scroll down the page, click to select "Freeze Header Rows" at the top. With that selected, when you scroll down the page the header will remain on the screen as long as that data table is also on the screen. If there are multiple data table, the headers will jump with each table.

When there are a lot of columns and you need one of the first few columns, such as the Participant's names or a pertinent date, then select that column number from the lower part of the menu, "Freeze Left Columns". As you move the Report to the left using the scroll bar at the bottom of the Report Pane, that column and any to the left of it will remain on the screen as a reference point for the rest of the data table.

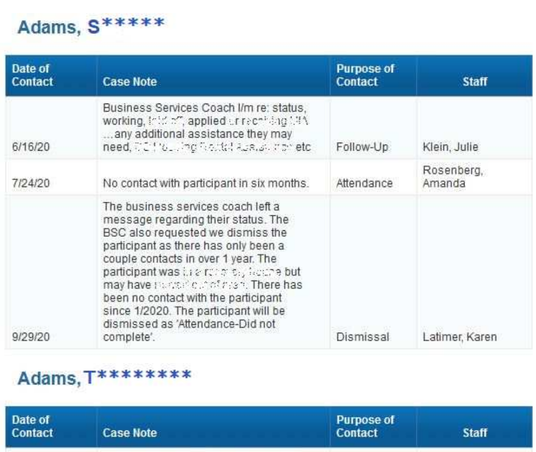
Outline

The *Outline* function can also be problematic, and there is little practical value to it that I can see. *Fair warning—I've found it more often than not fails to work at all when logged in as a staff-level user, but locks the application no matter what you do. What follows is what's supposed to happen.* If you click the button in most reports—especially those with a very large dataset—with no cells selected, then it will freeze the application. Once that happens—your mouse pointers "Busy" mode will appear and not go away—just close the report completely and start over.



All this function does is hide the details of a data table in the report. This is particularly noticeable when the report is divided into sections, such as the "Case Notes by Participant" report. To activate the function, click in any cell on the report and the button will go from grayed out to active (not much change of appearance as the button is monochrome anyway). Then click the button and a gray bar will appear at the side of the report, broken into sections with little arrows at the top of each section. Click an arrow in one of those gray sections, and the report will hide the detail of that section.

This…



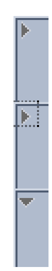
Adams, S*****

Date of Contact	Case Note	Purpose of Contact	Staff
6/16/20	Business Services Coach l/m re: status, working, [illegible], applied [illegible] ...any additional assistance they may need, [illegible] etc	Follow-Up	Klein, Julie
7/24/20	No contact with participant in six months.	Attendance	Rosenberg, Amanda
9/29/20	The business services coach left a message regarding their status. The BSC also requested we dismiss the participant as there has only been a couple contacts in over 1 year. The participant was [illegible] but may have [illegible]. There has been no contact with the participant since 1/2020. The participant will be dismissed as 'Attendance-Did not complete'.	Dismissal	Latimer, Karen

Adams, T********

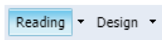
Date of Contact	Case Note	Purpose of Contact	Staff
	Business Services Coach called but		

Becomes this…



The direction of the arrows indicates whether the section is collapsed—hidden—or not. Hidden sections are indicated by arrows pointing to the right, and non-hidden sections by arrows pointing down.

Reading Mode/Design Mode



The final command option is between the *Reading* and *Design* modes. These two buttons are on the extreme right end of the Command Bar. By default, reports will *always* open in Reading mode. In Reading mode, the only change you can make to the report is to add or alter the filter bar. Otherwise, formatting, queries, and other changes can only be made in Design mode.

While all users can enter the design mode, the amount of changes that can be made to the report are limited by user access. Only administrator-level users can create or alter queries, add new fields, or save the changes. However, staff-level users (when it comes to reports, there are only two levels: *Staff* and *Administrator*) can make a surprising number of changes, though doing so can be very involved and enters into a whole new level of training. The best recommendation is to request changes and additions through the administrator.

> *While Staff-level users* ***can*** *make some changes to reports in design mode, it is not recommended and any changes made can only be saved to your personal favorites. Refer all change requests to an administrator unless you've received training on report building.*

If you do make changes, they cannot be saved to the original "public" (available to other users) version of the report, but will only be saved to your favorites folder (see the section on saving reports on page 14). Training is available, if approved by your Partner Agency and ETO administrators, but certain prerequisites are required.

Help

There is a help link, of course, just to the right of the Reading/Design mode buttons, but it's very technical and not at all helpful to even advanced users.

Other Ways to Open Reports

There are now a couple different ways a report can be launched or viewed, including the one described early in the chapter. One is Scheduled Reports, mentioned briefly above, and another is through Dashboard Reports. There is also a possibility of a report being launched from a link in another report. Reports can also have links to open TouchPoints, either to edit an existing TouchPoint or to record a new one.

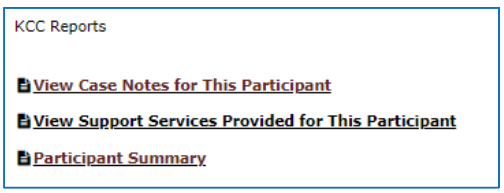
Scheduled Reports

Administrators have the ability to schedule reports to run automatically at a set interval of times, and set email addresses for the report to be sent to when complete.

We currently use a set of scheduled reports for data integrity reports. Each one of these reports is different, showing any kind of inaccurate or missing data that the builder could think of to look for. The reports are sent to one or more people per agency designated as data stewards. These reports are scheduled to run on the first day of every month.

Dashboard Reports

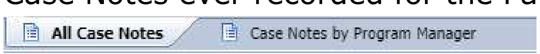
There are currently three report links on the Participant dashboard, though two of these are subsets of the third. They appear at the top of each



Participant dashboard under a heading that should indicate the ETO program you are logged into. When you open any of these reports, ETO will automatically open a new tab beside the one you are working in, that will say "*Your report is opening in a new window. If the report does not appear, ensure that your browser did not prevent it from opening via a Pop-Up Blocker*." You will need to manually close that tab when at some point, either before or after viewing the report. Clicking on any of the links will generate a report containing the pertinent data for that Participant alone, and no other. The three reports are described below.

Case Notes Report

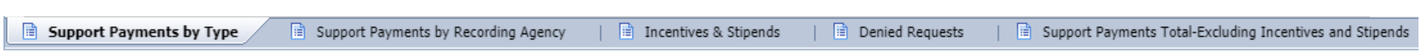
The dashboard *Case Notes Report* has no date prompt, so it will show *all* Case Notes ever recorded for the Participant whose dashboard you are on.



There are two tabs, "All Case Notes" and "Case Notes by Program Manager". The second one sections the report into subsets of entries under specific users who've recorded Case Notes for the Participant.

Support Services Report

The *Support Services Report* also has no date prompt, and will show *all* support services recorded for the Participant whose dashboard you are on. There are many tabs on this report, including "Support Payments by Type",



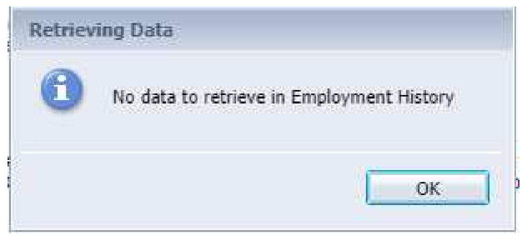
"Support Payments by Recording Agency", "Incentives and Stipends", "Denied Requests", and "Support Payments Total-Excluding Incentives and Stipends".

Participant Summary Report

The *Participant Summary Report* is customized for each Agency and program and shows data from the more common and key TouchPoints that Agency uses. There, again, are no date prompts so it will include *all* data ever recorded in those TouchPoints for the Participant whose dashboard you are on.

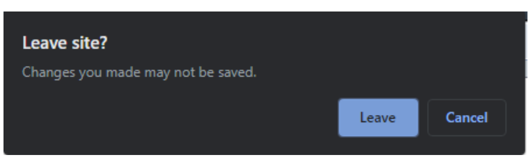
There is only one tab to this report, and all the TouchPoints are summarized in different data tables on the report. For employment data, if there is any employment, there are two tables, including one the is formatted like a resume with the work history information you would include on a resume.

If any TouchPoint that is part of the query and the resultant report has never been recorded for the Participant, you'll get an intimidating error message—especially if there are several TouchPoints with no data—telling you no data was found for that query. Fortunately, the queries for this report were named appropriately, so you will always know what TouchPoint was never recorded. Don't let this error message bother you…click "OK" and forget it ever appeared.



Closing Reports

As mentioned before, try not to leave a report open longer than necessary. Leaving it open for more than a few minutes results in a saved copy in your favorites folder that is difficult to get rid of. Close the report by simply closing the browser window it's running in. When you do this, it will ask if you really want to leave the (web) site, in an effort to keep you from making changes without saving them.



Since this is primarily for administrators, you should not ever be concerned about this message and can automatically select "Leave". This modal window will, of course, look different depending on the browser you use. The colors and shape of the box will be different and sometimes it will say "Stay on page" instead of "Cancel".