Working with Entities

Battle Creek Community-Wide Non-Profit Database

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

John P Recher

January 21, 2019

Contents

Working with Entities

Battle Creek Community-Wide Non-Profit Database

Introduction

Entities are any third-party individuals, agencies, or companies that work with us and our participants to assist in our efforts. While they include service providers, charitable agencies, vendors, and similar entities, the greatest majority or our entities are employers. When completing Employment TouchPoints, the employer names are drawn from a list of entities with the *Entity Type* listed in ETO as 'Employer'.

There are currently thirteen Entity Types in ETO as listed below. The indented lines under some of the Entity Types are Subtypes of those entities. Types and Subtypes can be added at any time.

- Administrative
- Billing Provider
- Businesses
- Classes
    - College & Career Readiness
- Education Institution
- Employer
    - Childcare Provider
    - Summer Youth
- Funding Source
- Individuals
    - Career Mentor
    - Instructor
    - Job Coach
    - Probation Officer
    - Tutor
- Property
- Referral Source
- Rental Housing Provider
- Service Providers
- Vendor

There are TouchPoints that are created specifically for Entities, to track efforts that they make on our behalf or to measure their performance and effectiveness. There are also a number of other places where different lists of Entities may be used to select from.

Due to the key nature of Entity records in some TouchPoints—most notably the "Employment" TouchPoint—it is necessary to make it possible for users at nearly all levels to add and edit Entities. Unfortunately, it is just as critical that users be cautious and precise when adding or changing an Entity.

Entities need to be assigned to each program that works with them individually, making the easiest mistake to occur the creation of duplicates. Just as with new Participants, it is essential that a user **search** for any potential *existing* Entity records **before** adding a new one. Duplicate records not only make the lists longer and more difficult to navigate through, they also can potentially corrupt the data in various TouchPoints. If you accidentally create, or discover an existing duplicate entity, contact the ETO Administrator to get the two records reconciled. Never delete an existing record because it appears to be a duplicate.

It is extremely important that you check for existing Entity records before creating a new one to avoid duplicates.

ETO has a variety of options for working with Entities and this chapter of the User Guide will attempt to cover them all, followed by step-by-step instructions that can easily be referred back to in the future.

Entity Quick Search

The first option is one often forgotten or overlooked, yet is the easiest and probably most powerful tool available when working with Entities. The Quick Search tool you should be using to search for participants can also be used to search for Entities. To do so, simply select "Entities" from the second box on the search line ("within"), then go back and type any part of the Entity name. *As with the participant names, the fewer characters you enter the better the search result will be*.

This is a much more powerful search tool than the others you will learn about in this paper because it will find *anything* that matches the character string you enter in the search box whether it is any part of the name, part of the contact name, or other criteria. It also does not need to be the *start* of the entity name as with other search methods but can be **any part** of the name. For example, if you were to search "poli" in other search methods, ETO will find only records that *start* with the letters "poli". As you can see in the illustration below, the same search with the Quick Search tool will find anything that *contains* the string "poli", even in the middle or at the end of

poli within Entities in BC Community Access Search

FullName	ContactName	Show Entity Type	EntitySubType	EntityType	EntityContactID	Show Contact Info
Battle Creek Police Department	Estree	Show Entity Type		Employer	1929	Show Contact Info
Family and Children Services	Poliski MA, LBSW	Show Entity Type		Employer	3177	Show Contact Info
MI State police	Police	Show Entity Type	Child Care Provider	Employer	4290	Show Contact Info
Polish National Alliance Club - Blair Street - Battle Creek	UNKNOWN	Show Entity Type		Employer	4708	Show Contact Info
Union City Police Department	UNKNOWN	Show Entity Type		Employer	5416	Show Contact Info
Battle Creek Police Department		Show Entity Type		Education Institution		Show Contact Info
Social Policy Research		Show Entity Type	Grant Consultant	Administrative		Show Contact Info

1 100 items per page 1 - 7 of 7 items

the name.

This can take away a great deal of the frustration that often goes with searching for a certain entity.

From this search result page, you can click on the Show Contact Info link and a modal window will open showing a summary of the contact information recorded for that Entity.

You can click on the Show Entity Type link and modal window will open showing a table of all the Types and Subtypes with check marks before the ones assigned to that Entity.

Clicking on the Entity Name link will cause a fly-out menu to pop up, similar to the one you get when clicking on a participant's name, displaying options for working with that Entity.

The last three choices from this menu will take you to an error screen basically saying the system is not set up to take Efforts, Assessments, or TouchPoints for Entities.

Clicking the first link (the Entities name) will open the Entity Dashboard, which contains very little helpful information, other than the address and main phone number. With the address is also a link to the Entity's View / Edit page.

The second link, View / Edit (New), will open the Entity's record for you to view the information or to make changes to the information.

The page opens at the first tab, Entity Information, where you will find the full Entity Name, Entity Type(s), Entity Subtype(s), Address (lines 1 and 2), Zip Code (followed by City, State, and County), Phone Number, Description, Entity Notes, Individual, and Services Provided (not often checked off).

Only two fields are required for an Entity record, Entity Name and Entity Type. While other information is expected, even desirable, it is often not available, especially when being entered by staff doing participant data entry that needs the Entity for an Employment TouchPoint.

You can assign more than one Entity Type, and most Entities have several types.

Entity Subtype is *not required*, even when a Subtype exists for one of the Types previously selected. Detailed instructions for entering this information will follow in the step-by-step section of the chapter.

The bars at the bottom of the page, Enterprise Attributes, Site Attributes, and Program Attributes are functions that Social Solutions (the ETO vendor) has not yet enabled and do not function.

There are three tabs on the <u>View / Edit</u> page, “Entity Information”, “Contacts”, and “Program Assignment”.

Contacts

On the Contacts tab ETO will display any contacts that have been listed for the Entity.

The first column, Relationship, is currently not used and should be blank. The rest of the columns will show the full names of contact people for the Entity, their title, phone numbers, links to edit the phone numbers, Address, Email address, and Take Action icons.

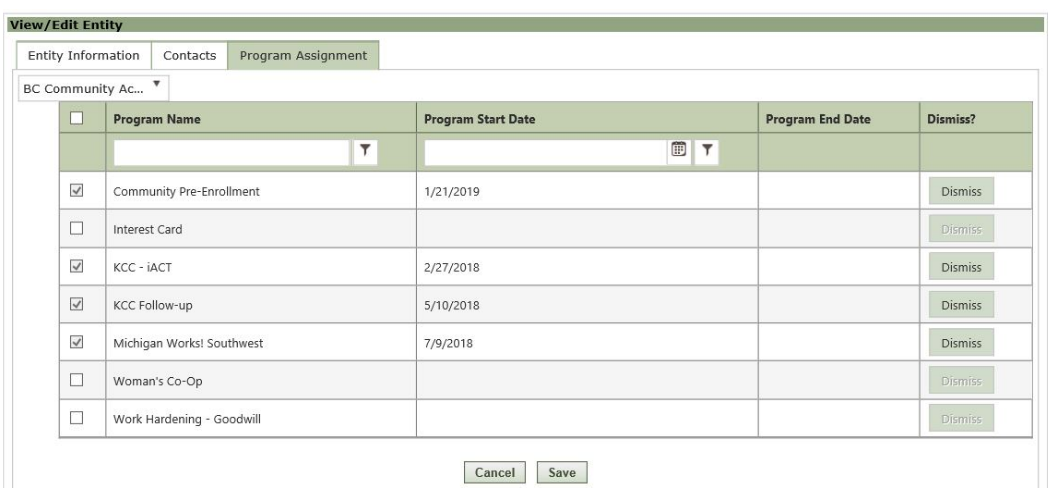
Above the chart is a button to add a new contact (obsolete contacts can be deleted from the Take Action icons). Click on this button to add a new Contact. New Contact information is recorded in a modal window that will open in the middle of the screen.

Relationship is not currently used on this site. The only required fields are First Name and Last Name, but as much information about the contact as is known should, of course, be entered.

The View and Edit Take Action icons  open the same form to be viewed in a read-only format or in an edit format.

Program Assignment

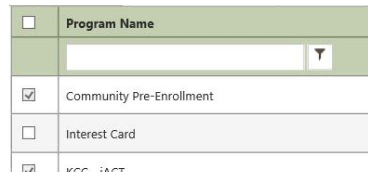
The third tab is where you make program assignments. Before you can see the entity in any other part of ETO, such as TouchPoints, you have to assign them to the programs that will work with them. You should be mindful of other users at this point, and make sure you assign the entities to any and all other programs that may



benefit from the entity (as your security level and program access allows you).

ETO should display the programs you have been given access to on the site you are logged onto. In this example, it shows all the programs in the *BC Community Access* site.

Check boxes before each program name indicate programs currently assigned to the entity. You can remove assignments by clearing the box or add an assignment by checking a clear box. A box at the very top will check all the boxes in the column and clear all the boxes.

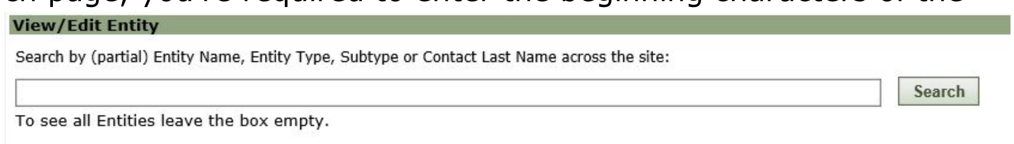


Find Entity

Another tool to search for an entity is <u>Find Entity (New)</u> from the Entity section of the Navigation Bar. The Find Entity tool starts with a selection box for an entity type. However, there is a link above the drop-down box, "<u>Click to search by entity name</u>". Clicking this link will open the search page described below.

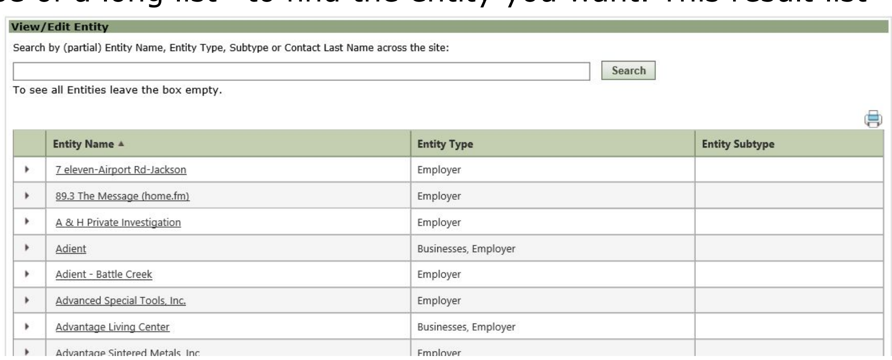
Search by Entity Name

On this search page, you're required to enter the beginning characters of the exact entity name.

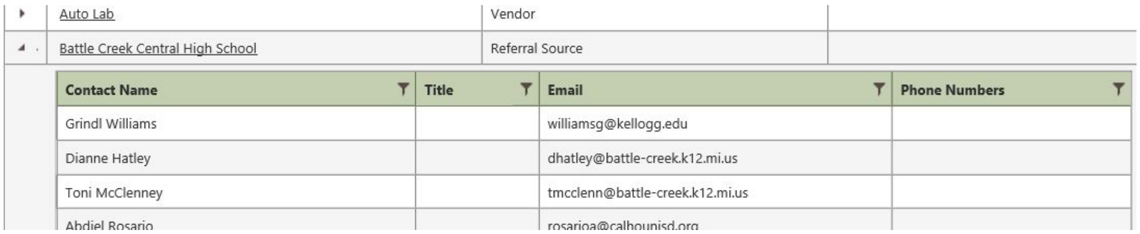


If you know the exact name of the entity you need to view or edit, enter the first word or two in the box and click on "Search". Alternatively, you can leave the box blank and click "Search" and you'll be presented with all the entities enrolled in the site.

ETO will display the results of your search in a page you can browse through—in the case of a long list—to find the entity you want. This result list is different from what you get when you specify the entity type. In this list you'll see a column of Entity Names,

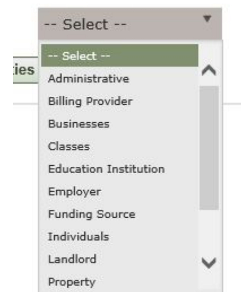


the Entity Type(s), and Entity Subtype. In the very first column is an arrowhead icon pointing at the Names. Click on the icon, the icon will turn down forty-five degrees and the entry will expand to show the contacts for that entity with email address and phone numbers if recorded in ETO.



Click on the Entity Name and the View/Edit Entity page for that entity will open.

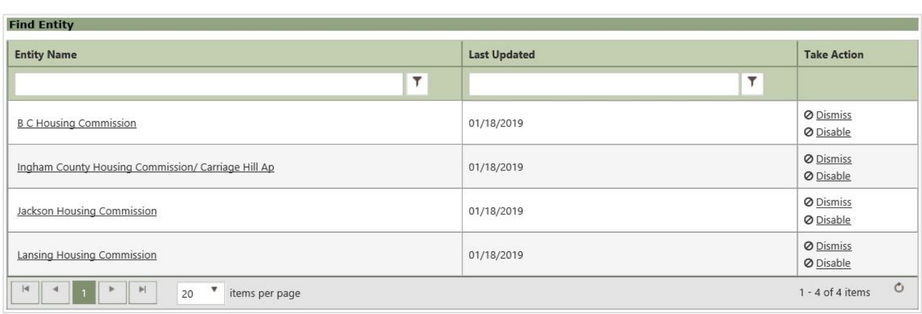
Search by Entity Type



If you elect to search by Entity Type then select the desired type from the drop down list. If you select an Entity Type that has Subtypes assigned to it—not all Entity Types have Subtypes—a second drop down box will appear to select a Subtype. You are not required to select a Subtype, but doing so—if known—will narrow down the search result.

You *are* required to provide an Entity Type, however. If you do not, an error message will appear.

Click on "Show Entities" or press the <Enter> key and ETO will display the search result.



This result page looks different from the Search by Name result page. Columns include the Entity Name, Date the Entity was Last Updated, and some action links to Dismiss and Disable the Entity.

As with the Search by Entity Name result page, clicking on the Entity Name will open the View/Edit Entity page for that entity and allow you to make changes to the entity data.

You should not Dismiss or Disable an Entity unless you are absolutely positive you know what you're doing and that it's the right thing to do so. Best practice is to contact the ETO Administrator and report an Entity that you think should be dismissed or disabled.

Add New Entity

This is perhaps the function of most interest to front-line users. Entering data into a TouchPoint that requires an answer from the Entities table but nothing matches what you need can be very frustrating. However, it can be a bit intimidating and frightening to have to take this step. However, as with anything in ETO, once you've done a few you'll find it comes easier and easier. Users should not fear making a mistake, as there are mechanisms in place to find and fix problems that may occur. All that is asked of us is that we make an effort to search—using the Quick Search method—to make sure the entity doesn't already exist in another program, or not having the right Type and Subtype assignments.

Select Add New Entity (New) from the Navigation Menu on the right side of the screen. ETO will open a blank Entity form.

The only required fields to add a new entity are the Entity Name and Entity Type. Entity Subtype is not required.

There are two tabs on this form: *Entity Information* and *Contacts*. Enter as much Entity Information as you can. When completed, simply click on "Save" at the bottom of the form. Detailed instructions for completing this form are in the next section.

View/Edit Entity

Selecting View/Edit Entity (New) will open the same search page that you'd get when selecting "Search by Entity Name" in the Find Entity function with one exception. When searching by name in the Find Entity function the words

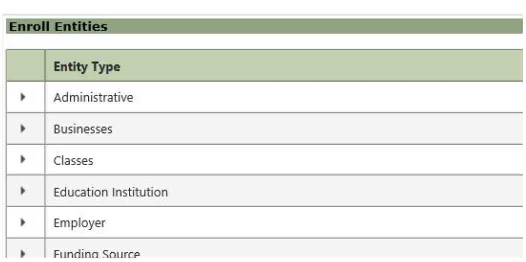
"across the site" are added at the end of the lead sentence, and ETO will search the whole site for the entity rather than just the program you are in. In this form ETO searches only the program you are logged into. As before, you have to put the *beginning only of the exact entity name* in the search box for it to find anything, and you can make all entities in the program appear by leaving the box blank.

Once you find the entity you want to work with, click on the underlined name of the entity and the View/Edit Entity form will open with the current data displayed.

Enroll Entity

An easy way to assign an existing entity to your program is with the Enroll Entity function. Select Enroll Entity (New) from the Navigation Bar on the right side of the screen and the Enroll Entities screen will open. There is no automated search feature in this screen, so you have to find the entity or entities you want manually.

Enroll Entity works best when you know a certain entity already exists on your site but is not assigned to your program. Otherwise, it is better to do a Quick Search for the entity and add them under the Program Assignment tab.



Click on the arrowhead icon in the first column for the entity you want to enroll and ETO will display all the entities that are not already enrolled in the program you are in. You can select more than one entity to enroll at once, and if you go from selecting an entity under one Entity Type to look for another under a different Entity Type ETO will remember the ones you've already selected when you click on "Submit" at the bottom of the page.

Dismiss Entities

Higher levels of access will see Dismiss Entity (New) on the Navigation Bar. The functionality is identical to the Enroll Entity function. When finished selecting the entities you need to dismiss, click the “Dismiss” button at the bottom.

A confirmation box will pop up. Click on “OK” to confirm.

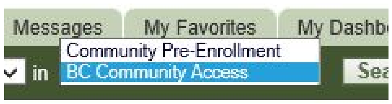
Step-By- Step Instructions

The following instructions are not all-inclusive, meaning the easiest and quickest methods are described rather than all the many options the software has built into it to perform the same tasks. Instructions in blue text are extra or optional steps that can, but do not need to be, taken.

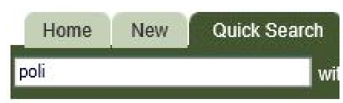
Entity Quick Search

1. If the Quick Search bar is not showing below the tabs, click the "Quick Search" tab near the top of the ETO screen. Select "Entities" from the drop down list in the second box, marked "within".

2. If you know the entity is enrolled in the program you're working in, tab back to the first box and skip to step three below. If not, or you've searched already with no success, select your site name—should be *BC Community Access*—from the list in the third box and tab back to or click in the first box (unless you are searching again for an entity already entered in the first box—then simply click on search or hit the <Enter> key).



3. Enter three or four characters from name of the entity in the first box. You can also search for the name of a contact person recorded in ETO for an entity, in case you know one but can't remember the entity name. ETO will find any record with the character string you entered *anywhere* in the name or a contact person's name. You cannot leave the box blank to see all entities—you must enter at least a partial name.



4. Select from the list ETO presents either by clicking on the underlined

FullName	ContactName	Show Entity Type	EntitySubType	EntityType	EntityContactID	Show Contact Info
Battle Creek Police Department	Estree	Show Entity Type		Employer	1929	Show Contact Info
Family and Children Services	Poliski MA, LBSW	Show Entity Type		Employer	3177	Show Contact Info
MI State police	Police	Show Entity Type	Child Care Provider	Employer	4290	Show Contact Info
Polish National Alliance Club - Blair Street - Battle Creek	UNKNOWN	Show Entity Type		Employer	4708	Show Contact Info
Union City Police Department	UNKNOWN	Show Entity Type		Employer	5416	Show Contact Info
Battle Creek Police Department		Show Entity Type		Education Institution		Show Contact Info
Social Policy Research		Show Entity Type	Grant Consultant	Administrative		Show Contact Info

name or the green arrow icon to the left of the name.

5. Select View / Edit (New) from the fly-out menu that appears to open the View/Edit Entity form.

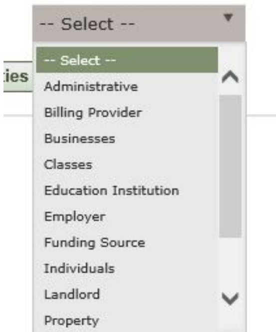
6. If you want to see the Entity Type(s) and Subtype(s) for any entity in 

the list (although the next two columns show this information already), click on "Show Entity Type" in the third column. A new window will pop up listing all the Entity Types with a check mark in the box beside the assigned type.

7. If you want to see the contact information for an entity in the list, if recorded, click on "Show Contact Info" from the last column. A new window will pop up showing contact information, if any has been recorded for that entity.

Find Entity

1. Select Find Entity (New) from the Navigation bar on the right side of the screen.

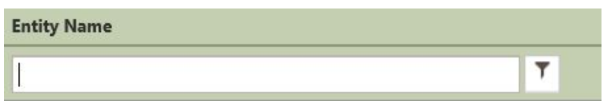


2. Select an Entity Type from the drop-down list on the Find Entity page that opens.

3. If there is an Entity Subtype and ***if*** you want to specify an Entity Subtype to narrow the result list, select one from the drop down list that appears (if there is no Subtype no second select box will appear).

4. Click the "Show Entities" button.

5. Scroll down the result list and/or use the navigation controls to locate the entity you want to work with. You can also enter part of or the entire name in the filter box at the top of the name column.



6. Click on the underlined name of the entity to open it in the View/Edit Entity page.

Add New Entity

Entity Information

1. Select Add New Entity (New) from the Navigation Bar on the right side of the screen.

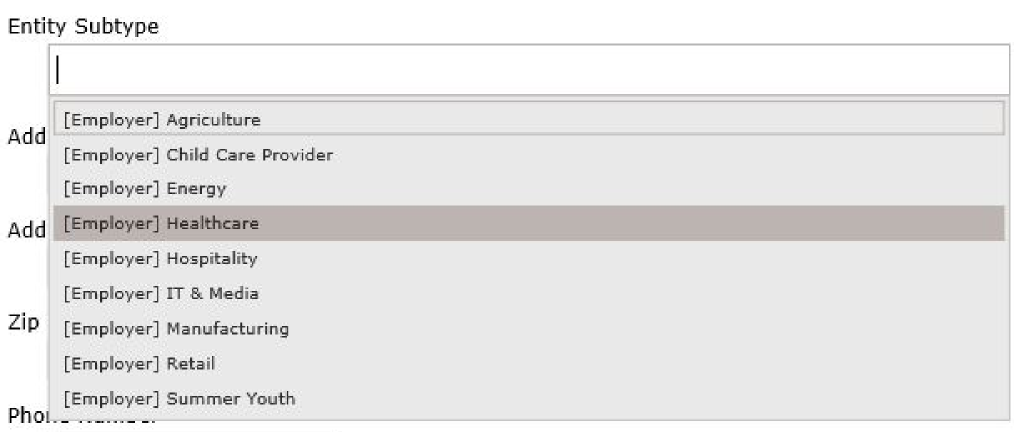
2. Entity Name: This is a free-text field. Type in a new entity name in the box. *This is a required field.* ***Please see the Entity Naming Conventions in Appendix A at the end of this paper.***

3. Entity Type: This is non-exclusive choice (may select more than one) drop-down list box. Click anywhere inside the box to select as many

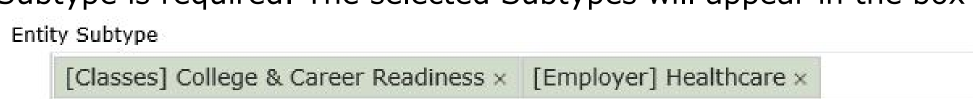
Entity Types from the list as apply, but you must select at least one. *This is a required field.* The selected types will appear in the box with

an "x" icon on the right side of the Type name. If you need to remove that Entity Type, click the "x" to delete it.

4. Entity Subtype: This is a non-exclusive choice (may select more than one) drop-down list box, filtered by the selected Entity Type(s). Select

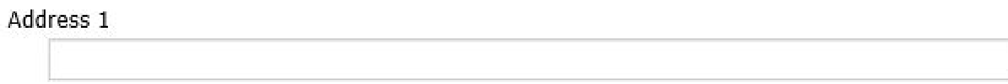


as many Entity Subtypes from the available list as apply, but no Subtype is required. The selected Subtypes will appear in the box with



an "x" icon on the right side of the Subtype name. If you need to remove that Entity Subtype, click the "x" to delete it.

5. <u>Address 1:</u> This is a free-text field. Type in the street address of the



entity if known. This field is not required but should be entered if it can be determined. *Please see <u>ETO Data Entry Standards</u> in Appendix B.*

6. <u>Address 2:</u> This is a free-text field. Type in the apartment, suite, or lot number, or other specifying address beyond the street address. *Please see <u>ETO Data Entry Standards</u> in Appendix B.*

7. <u>Zip Code:</u> This is a pre-formatted number field that accepts only 5 digit zip codes. Type in the 5-digit zip code (ETO will determine the City, County, and State from the zip code).

8. <u>Phone Number:</u> This is a pre-formatted number field that will automatically add parentheses around the area code and a dash between the exchange and last 4 numbers. Type numbers only in the **Main Phone Number** for the entity. (Other phone numbers can be entered under contacts)

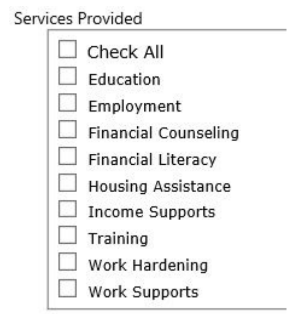
9. <u>Description:</u> This is a free-text field. ETO does not specify the number of characters this field will accept but it appears to be in the thousands. Type in a reasonable description of the entity in the box, enough to know specifically who it is and why they are of interest to community agencies.

10. <u>Entity Notes:</u> This is a free-text field. ETO does not specify the number of characters this field will accept but it appears to be in the thousands. Type in any warnings or restrictive information, eligibility requirements, or similar

information in the box.

11. Is Individual: Yes/No checkbox. This is for individuals who volunteer or provide services outside of a business setting, such as mentors, instructors, and similar. If you check this box, you will be required to provide contact information for the individual. If appropriate, check the box for '*yes*', leave unchecked for '*no*'.

12. Services Provided: This is a non-exclusive choice (can choose more than one) option group of available services. Data in this field can help in searches and with reporting. Select all the appropriate services that apply to the entity. These choices are fed by an underlying table and can be defined by the ETO Administrator as needed, and are used in the referral process.



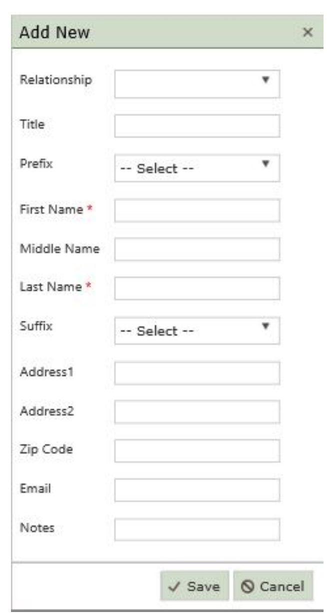
13. Attributes: The three attribute options—Enterprise Attributes, BC Community Access Attributes, and [Program Name] Program Attributes—are for a non-functioning feature. Clicking on the banners will do nothing but cause the arrowhead icons to rotate 90°.

Contacts

1. Click on the Contacts tab at the top of the form.

2. Click on the "Add New Contact" button immediately below the tabs.

Fill in the "Add New" form that pops up.



3. Relationship: *Not currently defined.*

4. Title: This is a free-text field. Type in a formal title of the contact, if applicable (i.e. President, Job Coach, Instructor, etc.).

5. Prefix: This is an exclusive-choice (can choose only one) drop-down list box with pre-defined choices such as Mr., Ms., Rev., etc. Select the applicable prefix if appropriate.

6. First Name: This is a free-text field. Type in the contact's first name. *This is a required field.*

7. Middle Name: This is an optional free-text field. Type in the contact's middle name, if known.

8. Last Name: This is a free-text field. Type in the contact's last name. *This is a required field.*

9. Suffix: This is an exclusive-choice (can choose only one) drop-down list box with pre-defined choices such as I, II, Jr., Sr., etc. Select the applicable suffix if appropriate.

10. Address 1: This is a free-text field. Type in the contact's street address, if known. *Please see the ETO Data Entry Standards in Appendix B.*

11. Address 2: This is a free-text field. Type in the contact's apartment, suite, lot, or other defining number, if known. *Please see the ETO Data Entry Standards in Appendix B.*

12. Zip Code: This is pre-formatted number field that will accept only 5-digit zip codes. Enter the contact's zip code if known. *There is no need to enter City and State as ETO will automatically determine the City, County, and State from the zip code.*

13. Email: This is a pre-formatted email field that will check for a valid email address (format only). Type in the contact's email address if known.

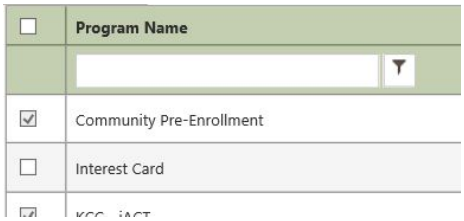
14. Notes: This is a free-text field (Social Solutions does not state how many characters are available in this field, but it appears to be well over a thousand). Type in any notes or comments you need to remember or that others should know about this contact.

15. Click on the "Save" button at the bottom (or "Cancel").

Click the "Save" button at the bottom of the "Entity Information" page (tab) when the new entity record is complete.

Program Assignment

1. Click the Program Assignment tab at the top of the form.



2. Check the box to the left of the name of any programs you want to assign to the entity. Only programs you have access to will appear in the list.

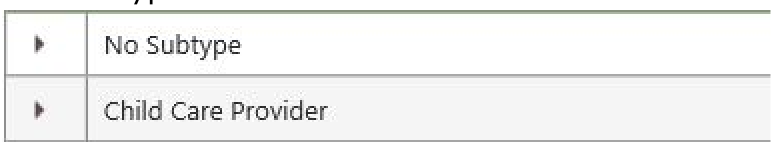
3. Click the “Save” button at the bottom of the form.

Enroll Entity

1. Select Enroll Entity from the Navigation Bar on the right side of the screen.

2. Click on the arrowhead icon to the left of the Entity Type that best fits the entity or entities you need to add to your program.

3. Click on the arrowhead icon to the left of the Entity Subtype the best fits the entity or entities you need to add to your program, or select "No Subtype" to list all the entities within the select Entity Type.



4. Use the navigation controls at the bottom of the list, if necessary, to move through the pages. You can also use the filter tool on the right

end of the header row but it will require you to use the *complete and exact* entity name.

5. Click the check box to the left of the entity or entities you want to assign to your program only (Note: this will only assign to the program you are signed into).

6. Click the "Submit" button at the bottom of the page.

Appendix A

Entity Naming Conventions

Using a standard naming practice across the enterprise will reduce the possibility of duplicate entries and make locating an entity in ETO simpler and easier. Please follow the following naming conventions as standard procedure in naming entities to consistency across the enterprise.

1. Do not use all capital letters unless the name is an abbreviation (ASMO, IBM, etc).
2. Do not use any periods in the name (Such as in "St. Lucy").
3. If you're confident there is and will always be only one such entity in our service area, use only the actual company or individual's name.
4. If there is and always will be only one per city, add the City name after a hyphen to the name (i.e. "Secretary of State – Battle Creek" or "Secretary of State – Marshall").
5. If there is any possibility of more than one entity by the same name, such as McDonald's, follow the convention **[Entity Name]–[Street]–[City]**. (i.e. "McDonalds–Capital NE–Battle Creek", "McDonalds–W Michigan–Battle Creek", "McDonalds–W Michigan–Marshall").
6. To be consistent, do not use possessive apostrophes in names, such as McDonald's, even when the entity uses them in their names. ("McDonalds", not "McDonald's", or "Walgreens", not "Walgreen's")
7. Do not use nicknames (i.e. "Mickey-D's" for McDonald's or "BK" for Burger King). Spell out the proper name correctly. Take the time to do an internet search for the company if you need to in order to get the name correct.
8. Check other similar listings in ETO to make sure you being consistent with current practice.

Appendix B

ETO Data Entry Standards

Capitalization:

Do not use caps lock, use lower case where appropriate.

Capitalize proper nouns, compass points (N, S, E, W, NW, SE, etc).

Period Usage

Use periods only in narrative fields to complete sentences. Do not use periods to close abbreviations.

Hyphenated Names

Do not leave a space before or after a hyphen in any hyphenated name.

Address Formatting

Always use standard address format.

Enter only the street address of the building or mobile home park in the *Address 1* field.

Apartment, lot, suite numbers, etc. belong in the *Address 2* field.

Do not enter city or state in either address field. ETO will automatically determine the City, County, and State from the Zip Code.

Do not spell out compass directions. Use standard abbreviations.

Place compass directions before the street name, not after. Although it is correct and proper to place it after Avenue, in the interests of consistency it should always be placed before the name in ETO. The one exception to this will be Capital Ave NW and SW in Battle Creek, because of the iconic nature of that street.

Do not spell out street types, use standard abbreviations (see appendix A). One exception to this is the Springfield Avenues (Avenue A, Avenue B, etc.); in this case the word should be spelled out.

Do not use periods after street type abbreviations or compass directions.

Use the abbreviation for apartment, suite, or the word lot whenever possible, but a pound sign (#) can be used when uncertain. The term "flat" is not used in this part of the country.

Use street types when possible, though in Battle Creek they are not necessary for more than two or three streets (Taft St and Taft Ct, for example).

Examples:

123 Main St
Apt 4B

1145 Harmonia Rd
Lot 145

15 Capital Ave NE
Ste 2

Appendix A

Standard	**Abbreviation**	**Alternate**
Avenue	Ave	
Apartment	Apt	
Boulevard	Blvd	
Drive	Dr	
Lane	Ln	
Parkway	Pkwy	Pky
Place	Pl	
Road	Rd	
Street	St	
Suite	Ste	Suite

INDEX