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Better data. Greater impact.

Monthly Event Topic:

ETO & APRICOT: RESULTS REPORTING BEST PRACTICES

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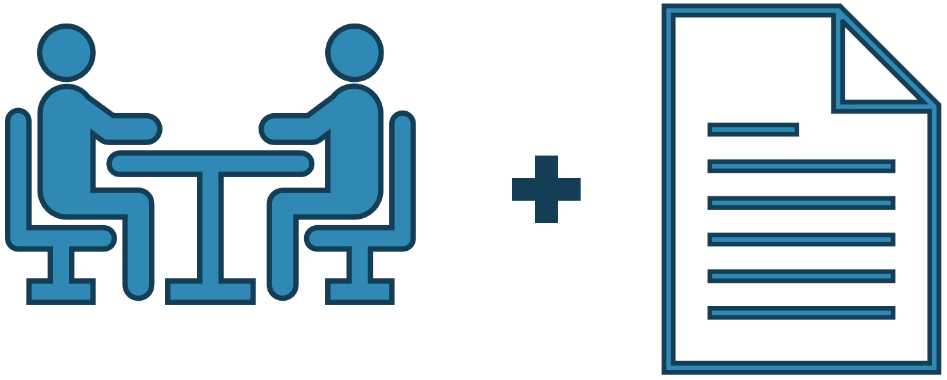
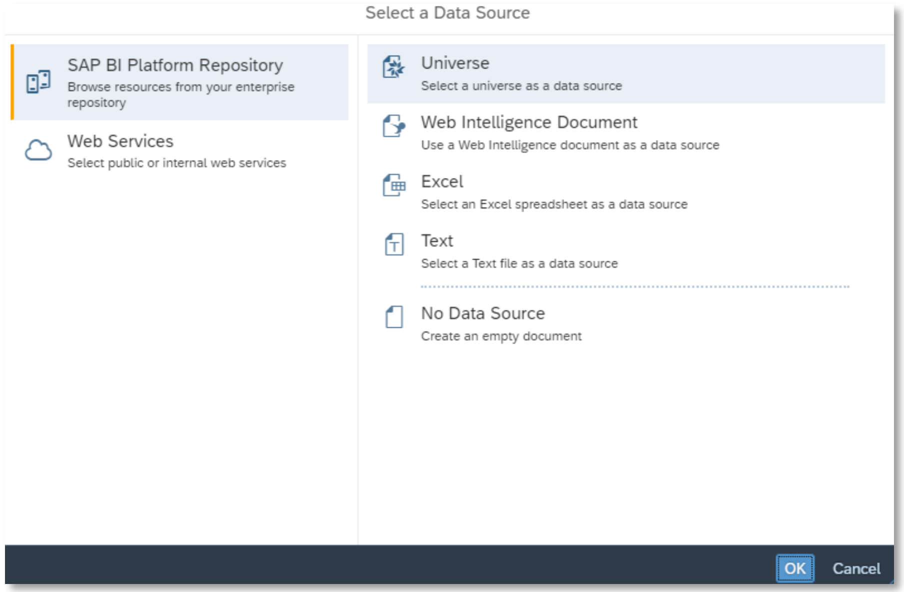
February 21, 2024

Purpose of Today's Call

Preparing to Build a Report



Building in Results



Your Presenters

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Today's Agenda

I. Using Results or Apricot Native Reporting?
II. Configuration Tricks and Tips
III. Building Report Specifications for Results
IV. Query Construction
V. How Results Tables Operate

Part I. Using Results or Apricot Native Reporting?

Results

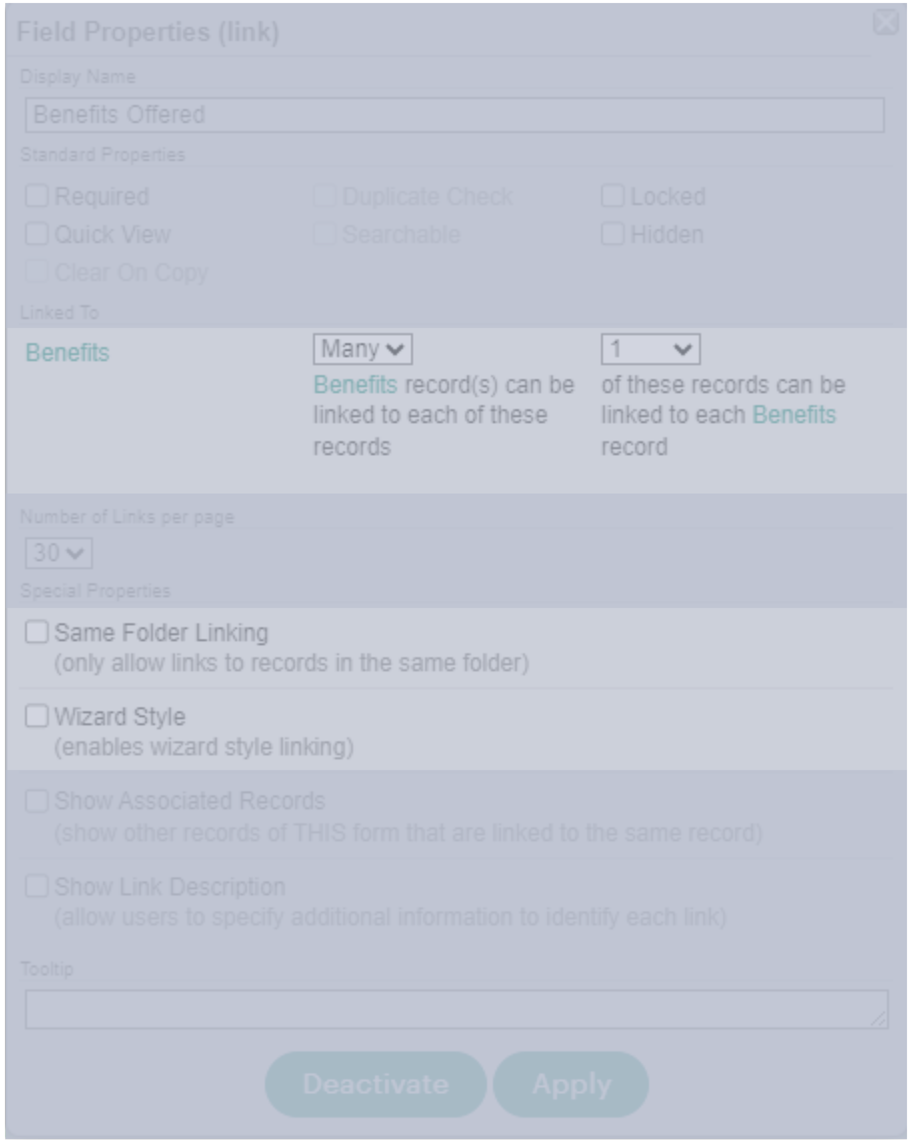
- If the Report formatting is specific, Results is best
- Only Administrators need to run
- Can be scheduled to send to users or external stakeholders
- Complex reporting needs

Native

- If a report formatting is not important, Native is a good option
- Standard users need access
- Can be viewed from the Bulletins (Home) page
- As more sections and forms are added into a report, the more performance issues will occur in the report

Part II. Configuration Tricks and Tips (for Results) - Apricot

- Linking – Establish relationships between 2 forms
  - 1:Many, Many:1, 1:1, or Many:Many – What to consider
  - Regular vs. Wizard
  - Auto-populate fields may help expedite the reporting process
- Field selections – Text vs. Defined option fields, single select vs. Multi-select
- Field Naming Conventions (even between forms)
- Don't forget to check the "Enable in Results Reporting" box in the form settings



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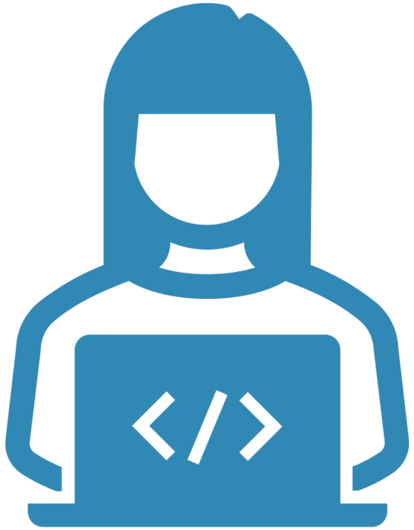
Part II. Configuration Tricks and Tips (for Results) - ETO

- Demographics versus TouchPoints. Demographics should be used for participant information that usually does not change over time. Why? Demographics that change over time does not collect a history of answers (outside of address). Examples of Demographics would be Date of Birth, SSN, Race and Ethnicity. Demographics that would be better suited to be captured in TouchPoints to maintain a history over time are; Income, Employment, Medical Information, Levels of Education and Participant Program Progress Statuses.
- Avoid creating elements multiple times with the same name…for example, if you are collecting 2 Emergency Contact Names…don't have 2 elements named Emergency Contact Name. Instead use Contact Name 1 and then the other element of Contact Name 2. This allows the report writer to define exactly what you need for the report.
- Text Fields can impact reporting. If there is data that is needed for reporting, do not make it a text field. You should make those elements that are easily counted such as Single/Multiple Select or Numeric. I have experienced staff who enter their services provided into a text field for Notes. This is incredibly difficult to pull into a Report uses Match criteria as staff will enter data with misspelled words or abbreviations for example. It is much easier to avoid the text for reporting elements.

Part II. Configuration Tricks and Tips (for Results) - ETO (cont)

- When reporting on groups it is also best practice to utilize ETO functionality that will produce a group ID. Examples of this are utilizing Families and/or Collections. If you have a group activity and use multiple participant touchpoint (where you search for all participants) you can only connect the activity with a date field, but if you use Collections, you connect the participants with a single collections ID. Program Enrollments also produce a Unique ID so that all work done by a participant can be pulled into a report for the enrollment that you wish to capture.
- Primary/Sub TouchPoints (Parent/Child TouchPoints) are another way to capture activities by a specific ID. For example if you create a Primary/Parent TouchPoint to capture Participant Goals to work on and you create the Sub/Child TP to track the progress on that you, all the work done in the Sub/Child, is connected to the correct Primary/Parent with an ID. This is much easier to pull into reporting.

Part III. Collecting Report Specifications - Who Attends?



You, the ETO Administrator

In-depth knowledge of their particular ETO instance and how databases work

Report end user - leadership or staff

Understands the end vision and usage for the report

Part III. Collecting Report Specifications – Checklist Pt 1

How is this report used?

- What's the purpose of this report?
- Who all will be reading this report and what is their role? Which Sites and Programs?
- What key pieces of information will they come to this report to gather?
- How frequently will it be used? Daily, monthly, quarterly, etc
- Will the report be exported or used in Results? If exported to Excel, what calculations, if any, are expected to be done in Excel?

Part III. Collecting Report Specifications - Checklist Pt 2

Who/what is counting in this report?

- If a participant report, who should count in this report?
- If they say “Active”, confirm how “active” is defined. Program enrollment? TP/Form taken in period?
- What’s the criteria for each metric? How do we qualify what counts toward a metric by using ETO?
- For each metric, where is the relevant information being captured in ETO? Which questions in which TouchPoints/Forms, Demographics, Referrals, etc?
- When are we capturing this metric? Between what dates? If pulling for the “year”, what’s the beginning and end of the “year”?

Part III. Collecting Report Specifications - Checklist Pt 3

How is the data presented?

Is this a participant-based report (flat file export) or summary/aggregate level report?

If participant-based, which metrics if any will be calculated from that table (like count of participants)?

How would you like that represented in the report? What should the final product look like? Does the layout support how it will be used?

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Part III. Collecting Report Specifications - Review

"This report will include ______ who meet the following qualifications: ____________

The report will be primarily used by _______ to do ___________

It will show the following metrics: _______________

And it will be filterable by ______, _______, and _______"

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Part IV. Query Basics - Universe Basics

Apricot

Custom Universes:

All Flattened and based on a specific Tier 1

- All corresponding Tier 2s associated with that Tier 1 are in the Universe

***Standard Universes

Unflattened and based on either

- Record: All Forms
- Tiered Record: Tier 1s and Tier 2s separated, or
- Reference: References to fields

Universal

- Multiple data sources in a single report!
- Excel Documents as Data Source

ETO

Custom Universes:

Mostly flattened and based on Subject Type: Participant, Generic, Entity, etc.

- Select specific TouchPoints and Collections

Standard Universes:

Unflattened and based on an area of ETO

- Staff
- TouchPoints
- Reference
- Universe Dimensions
- Etc.

****Issues historically, updated recently with new Universes!*

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Part IV. Query Basics - Unflattened vs. Flattened?

	eto	apricot
Flattened	One row per TouchPoint response or referral response	One row per Form
Unflattened	One row per TouchPoint, question, answer choice, demographic question, demographic value, etc.	One row per Form, question, answer choice, demographic question, demographic value, etc.

Part IV. Critical Querying Considerations

- Performance Considerations
  - The more “tables” of data you put together in a single query, the more likely it will run slower.
  - Certain tables are just poorer performing, such as ETOs unflattened demographics.
  - Unflattened data requires more processing power than flattened.
  - Volume of records matters.
- Setting yourself up for success:
  - First things first: get your data side-by-side if the processing of the queries will allow.
    - It’s always easier to build stronger/better reports when the data you want side-by-side comes right through the query with no merging dimensions/context.
  - If your queries aren’t processing, you’ll need to find a way to break them up into separate queries
  - BEWARE: if you build a report where there’s no data yet in the system, keep an eye on the report’s performance over time.

Part IV. Results Querying Capabilities

- Filering
  - Hard coded filtering: “only responses from the Case Plan Goal folder”
  - User Prompts: “Select your date range”
    - Ability to pass prompts to the report from a URL
  - All variety of operators: Inlist, between, <=, >=, etc., match, not match, etc.
  - Query within a Query:
    - Subquery
    - Response from another Query

Part V. How Results Tables Operate

- The "Pivot Table" Concept
  - If you know how an Excel Pivot Table works, then Results will make a lot of sense.
  - Table Rule for Results:

    A table in results will attempt to display the minimum amount of rows possible based on the unique combination of values for the data objects added to the table.
  - Calculation Context Rule for Results:
    - Calculations change based on the "context" of the table…meaning the various data objects that are included in the table.
    - This can be a big mental challenge.
    - IDs are your friend! They clearly indicate distinct things.
    - Calculation options: min/max, sum/count, first/last, etc.

    A given calculation, or measure, will function relative to the context of the table.

Questions

Managed Services Program Benefits

Base Managed Services

- Consultation
- Support Coordination
- System Monitoring
- Access to exclusive monthly Treadwell events
- Discounts on additional services

Tiered Services

- Professional service hours
- Access to Treadwell's network of experts
- Credits towards advanced features

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https://treadwelldata.com/support-services/

March’s Call

Change Management
Best Practices

March 20, 2024

1 PM Pacific | 4 PM Eastern

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