ETO Software®
Query Wizard Guide
Updated June '09

Introduction

The Query Wizard is a tool designed as a supplement to the numerous reports available in ETO Software. Before using the Query Wizard, site administrators should consider what they are looking for in their data, and if there is already a report in ETO that can give them this information. The Query Wizard should be considered only after you determine that there is no report in the software that can compile the information you need. Please refer to the reports section of the ETO Software help manual or either of the recording trainings focused on reports for more detail on available reports.

Terms found in the Query Wizard:

- **Query** – Any request for data from the database.
- **Subject(s)** – Staff, Participants, Entities, General (Program Level), Family, Efforts (Effort Qualifiers), Funds. The subject is selected on Step 1 of the Query Wizard.
- **Focus Areas (Foci)** – Pre-defined set(s) of data within the selected subject including: demographics, program history, assessments taken, efforts recorded, employment information, etc. The foci listed are related to the subject selected in Step 1; foci are selected on Step 2 of the Query Wizard.
- **Details** – Data elements or fields found within focus areas. By single clicking to highlight a focus area on Step 2 of the Query Wizard, the details included in that focus area will appear on the right. Details can be selected or filtered on Step 3 of the Query Wizard.
- **Select** – Check the box to the left of a data element to produce a column in the query results with a header matching the data element name. Note that some data elements are selected by default and can be de-selected if not needed in the results.
- **Filter** – There are 3 types of filters available to each data element:
    - **Regular Filter** – reads "Turn Filter"
    - **Null Filter** – reads "Filter Nulls"
    - **Advanced Filter** – reads "Filter Advanced"
- **Scope** – By default, Site Managers and Department Heads will pull queries containing data across the site, Enterprise Managers will pull data across the enterprise. If filters are applied to pull data specific to a smaller scope, those filters override the default scope.
- **Requery** – Return to Step 2 to make modifications to a query after viewing its results in Step 3.
- **Save Query** – This makes the query available to the user to run in the future. Prompts can be set on data elements in the query.
- **Share Query** – Saved queries can be made available to lower level users; they will appear on the Custom Reports page.

1

**Important facts about the Query Wizard:**
- The Query Wizard is refreshed every quarter of the hour with data that has been entered into the Software. If a query is running during the time it is scheduled to refresh, the refresh will be put on hold until the next quarter of the hour. If the refresh is blocked by running queries for over 45 minutes, the query wizard will force the refresh and queries running during the refresh process may take longer to generate. This means that data pulled from the query wizard could be up to 45 minutes old when compared to the live data in ETO.
- The Query Wizard only returns *distinct* records in the output. This means that any rows of data which are precisely the same will be displayed only once (thereby eliminating all true, full duplicate rows). For example, if there are two John Smiths who live in the same city and state, and the query is only returning First and Last Name, City and State, the query wizard will only return one row of data instead of two. This can be avoided by including the Unique Identifier or another "unique per record" field in all queries.

Building a Query:
Using the Query Wizard Steps 1-3

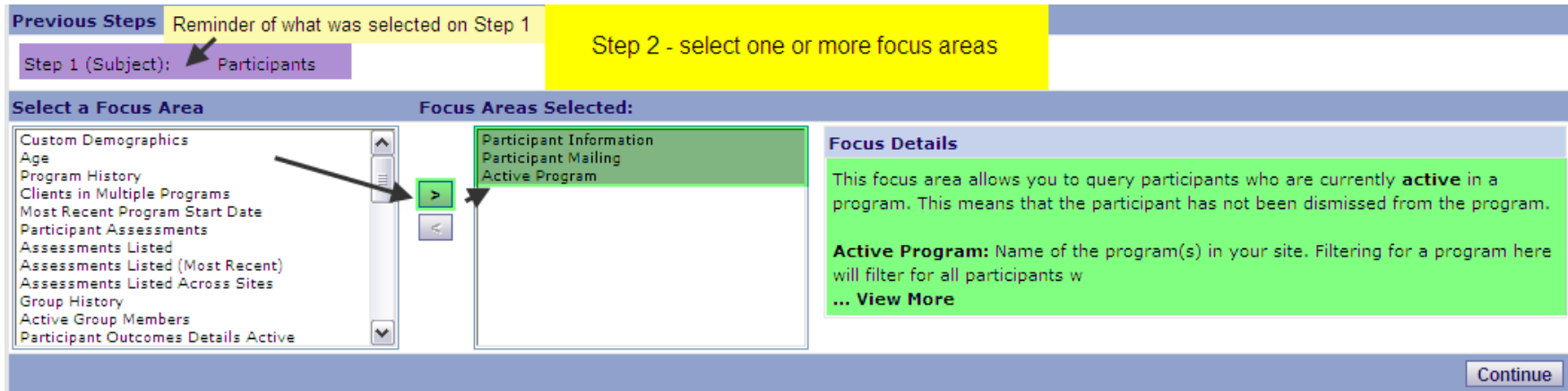## Step 1: Initial Interface / Selecting Subjects

Select only **one** of the nine subjects available. Selections can be made by double clicking, or a single click followed by clicking the arrow in the middle of the two boxes pointing right. Once the subject is selected, click Continue. Note that a description for a subject will appear to the far right once the subject is single clicked.

Participants	Participant Efforts (contains effort qualifier data and limited Point of Service data)
Entities	Entity Efforts (contains effort qualifier data and limited Point of Service data)
General	General Efforts (contains effort qualifier data and limited Point of Service data)
Staff	Funds
Family	
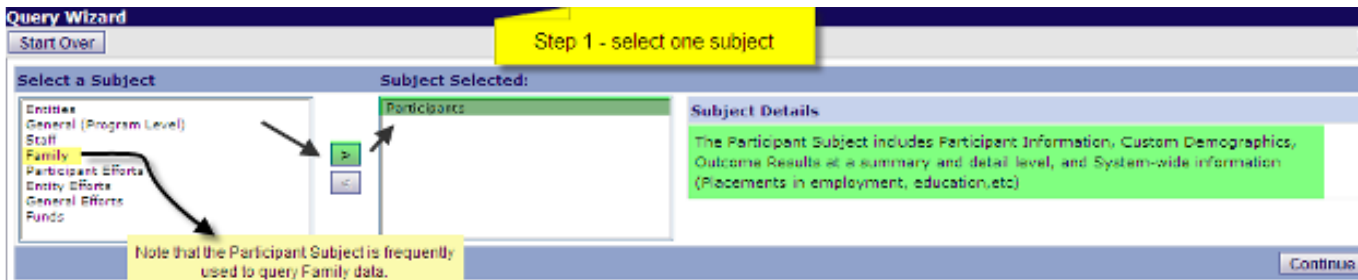
Step 2: Selecting Focus Areas

Select one or more focus areas from the list available. Selections can be made by double clicking, or a single click followed by clicking the arrow pointing right. Once the desired focus areas are selected, click Continue. Note that a description for a focus area will appear to the far right once the subject is highlighted by single clicking.

Previous Steps	Reminder of what was selected on Step 1		
Step 1 (Subject):	Participants	Step 2 - select one or more focus areas	

Select a Focus Area

Focus Areas Selected:

Custom Demographics
Age
Program History
Clients in Multiple Programs
Most Recent Program Start Date
Participant Assessments
Assessments Listed
Assessments Listed (Most Recent)
Assessments Listed Across Sites
Group History
Active Group Members
Participant Outcomes Details Active

>

<

Participant Information
Participant Mailing
Active Program

Focus Details

This focus area allows you to query participants who are currently **active** in a program. This means that the participant has not been dismissed from the program.

Active Program: Name of the program(s) in your site. Filtering for a program here will filter for all participants w

... View More

Continue

Which focus areas should be selected?

- <u>Always</u> select the first focus areas, "**Participant Information**", when building a query in the Participants Subject ("Entity Information" for Entity Subject, etc.).
- Additional focus areas should be selected based on the data that needs to be pulled. There is no limit to the number of focus areas selected, but the speed of the query may be affected if a large number of focus areas are selected. Most queries can be created with 4 focus areas or fewer. *Remember that focus areas cannot be added after continue is selected on Step 2!*
- The list of Focus Areas may grow as continual improvements are made to the software.
- It can take some time to become proficient in selecting the focus areas you need. Here is a list of those participant focus areas selected most often (a complete list appears at the end of this guide):

Focus Area	Uses
Mailing Information	pulls standard demographic address, city, state, zip info from the View/Edit Participant page – used for creating mail merges or quality assurance queries (to ensure all participants have contact information in ETO)
Custom Demographics	pulls custom demographic data from the View/Edit Participant page – for program specific demos, be sure to be in the appropriate program when building the query (many ETO sites use custom demos to capture data differently than standard demos – check the Manage Demographics page on your site to see how your site is capturing a particular field)
Age	this is the participant's age as of today, based on DOB entered on the Add New Participant page (for historical age, a query should be built with DOB, the query results exported to excel, and a formula created there to determine age on a particular date)
Program History	participants previously and currently enrolled in one or more selected programs (based on the start date on the bottom of the Add New Participant page, visible on the Participant Program History page)
	participants enrolled in a date range
	count of program enrollments to pull participants who have been enrolled more than once
	active in a date range – active means participants who were in the selected program(s) for one or more days within the date range regardless of when they started the program

4

2479 Boston St. Suite 300
The Hexlog Building 3rd Floor
Baltimore MD 21224

Phone: 410-252-7660
Toll Free: 866-732-3682
Fax: 410-252-7661

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Active Program	participants active in the selected program(s) currently (enrolled and not dismissed)
Participant Assessments	more generic assessment focus area, best for queries that only need data for one or two assessment questions, or just pulling assessments taken in a date range or by staff person
Assessments Listed	more detailed assessment focus area, best for queries that need data for more than 2 assessment questions – this focus area takes the most Query Wizard resources and may produce a scheduled report (meaning the query results may not be available immediately)
Participant Outcome Details Active	pulls point of service data recorded on the Participant Efforts, Multiple Participant Efforts, Record Attendance, and Record Hours of Attendance screens – this focus area only includes Point of Service elements that are enabled on the Manage Point of Service page; "active" refers to the fact that the point of service element is "active" and not disabled – the "all" version of this focus area can be used to pull disabled point of service element data.
Participant Attendance	pulls attendance point of service data only (regardless of whether data was entered with the Record Attendance feature) – this focus area is for pulling rate of attendance, count of absences or days attended, etc.; also includes the group or family used to record attendance if applicable.
Composite Outcomes Listed	creates a column for each POS element within a composite, making it easier to work with composite data; this is a program specific focus area and the query must be run in the program where the composite exists
Effort Qualifiers Listed	allows for filters to be applied to specific Effort Qualifiers, and to link EQ values to POS values from the same effort – use in conjunction with the Participant Outcomes focus area to achieve this
Family Members	great for counting the numbers of families versus the number of individuals who have had an effort recorded, or to filter by head of family (household) for creating mailing lists
Job Information	allows for averages on wages and hours per week, as well as comparison of changes in wages and hours over time (start vs. end)

Step 3A: Selecting Details

Use the check boxes on the left to indicate whether this Detail element should be included in the output of the query (meaning it will be listed as a column in the results grid). If you select a **Detail**, but do not select a **Filter** option (described next), you will receive a list of all subjects, even if the chosen field has no data.

Three boxes are checked or selected on Step 3 on this example:

The query results include 3 columns, each headed with the name of the data elements selected in Step 3:

Selecting data elements to appear can make a major impact on the number of query results. The query on the left includes the date of contact, which produced a duplicated count or 113, unlike the unduplicated count of 11 shown in the query on the right. Together, these queries tell us that 11 participants received a total of 113 efforts in the selected POS:

Left panel:

Participant Outcomes Details Active

Program: Clinical Case Management

--Select--
$ Value of Service
Develop a Relationship for Action
Track Services Provided

☐ Outcome Name Details — Turn Filter OFF / Filter Nulls ON / Filter Advanced ON

☐ Outcome by Name Details — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☐ Composite Name — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☐ Composite by Name — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☑ Date of Contact — 4 — Turn Filter OFF / Filter Nulls ON / Filter Advanced ON — less than / Jun / 8 / 2009 / today

VBScript: Returned Records

Your Query returned 113 Records. Would you like to view these Records?

[Yes]   [No]

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	DATE OF CONTACT
8570 Amari	Brody	01/13/2006
8570 Amari	Brody	01/22/2006
8570 Amari	Brody	02/09/2006
8570 Amari	Brody	02/25/2006
8570 Amari	Brody	03/12/2006
8570 Amari	Brody	03/27/2006
8570 Amari	Brody	04/12/2006
8570 Amari	Brody	04/22/2006
8570 Amari	Brody	05/09/2006
8570 Amari	Brody	05/23/2006

Right panel:

Participant Outcomes Details Active

Program: Clinical Case Management

--Select--
$ Value of Service
Develop a Relationship for Action
Track Services Provided

☐ Outcome Name Details — Turn Filter OFF / Filter Nulls ON / Filter Advanced ON

☐ Outcome by Name Details — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☐ Composite Name — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☐ Composite by Name — Turn Filter ON / Filter Nulls ON / Filter Advanced ON

☐ Date of Contact — Turn Filter OFF / Filter Nulls ON / Filter Advanced ON — less than / Jun / 8 / 2009 / today

VBScript: Returned Records

Your Query returned 11 Records. Would you like to view these Records?

[Yes]   [No]

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME
8570 Amari	Brody
8645 Linda	Whitlye
8646 Daniel	Gatley
8647 William	Parker
8648 Barbara	Harley
8650 Etta	Rothberg
8651 Emily	Jackson
8652 Donna	Vasquez
8655 Fernando	Martinez
8658 Ellie	Macaphee
9711 Mia	McGuire

![SocialSolutions | a division of ETOSOFTWARE®]   relating efforts to outcomes:
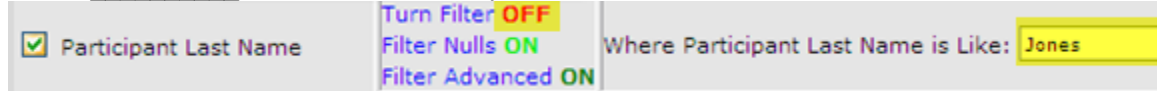
Step 3B: Applying Filters

The right side of the screen to actually apply filters to data elements. By default, all of the filters are in the OFF position (although the text reads ON). Clicking on the ON or OFF label will toggle the filtering options. Note that it is easy to see when a filter has been turned on because additional details are visible.

Each data elements have three available filters: regular, null, advanced. Each type of filter has its own unique options, as detailed next.
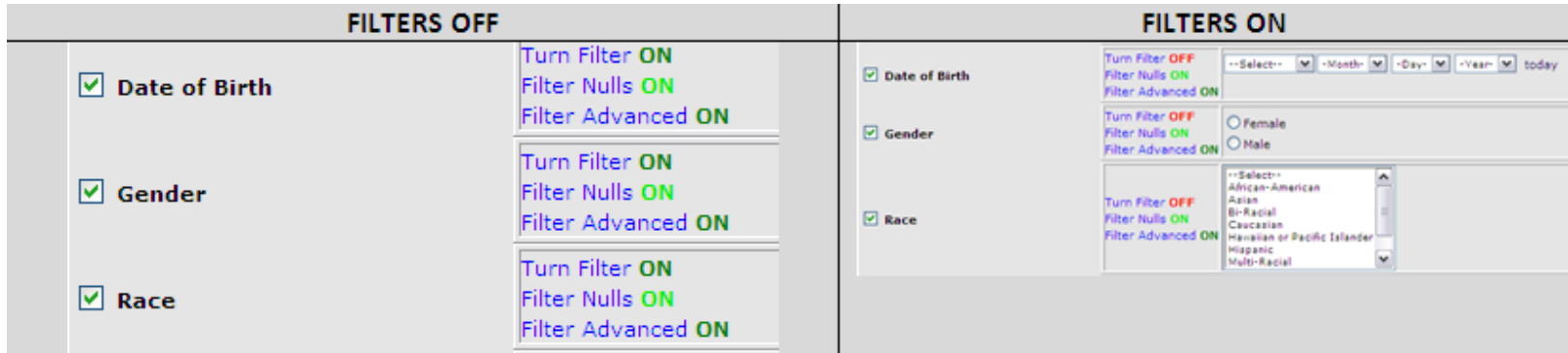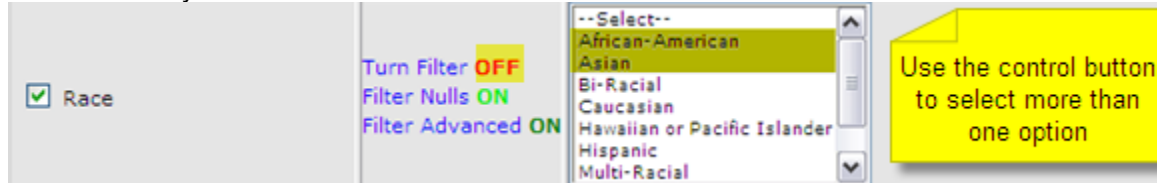
1. **Turn Filter:** This is the first, or the top filter, and is also referred to as the **regular filter**. It allows the user to filter on a specific value for a question depending on the type of question.

- Text-search filters search all of the text in a field for matches to your entry. These filters display a text box for searching "Where [field] is Like _____". Enter one letter, a partial name or word, or the full word.

☑ Participant Last Name	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	Where Participant Last Name is Like: Jones

- Limited Choice/Exclusive Choice Filters such as Program, Outcomes, Entity Type, and Exclusive Choice demographics, among others. To choose more than one selection, hold the CTRL key down as you click on each choice, or hold shift and use the up and down arrow keys to select several consecutive choices. These are also sometimes referred to as string values in the query wizard.

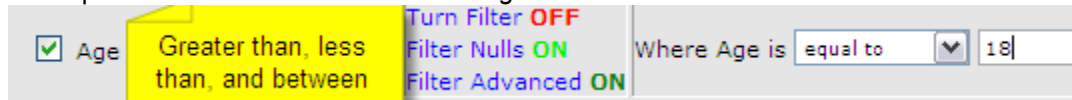| ☑ Race	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	--Select-- African-American Asian Bi-Racial Caucasian Hawaiian or Pacific Islander Hispanic Multi-Racial	Use the control button to select more than one option

- Date filters select birth dates, dates of contact, etc. Filter for one particular date, a range between two dates, all entries less than or greater than a particular date, or all dates not equal to the date you choose. *Note: greater than and less than are not inclusive.*

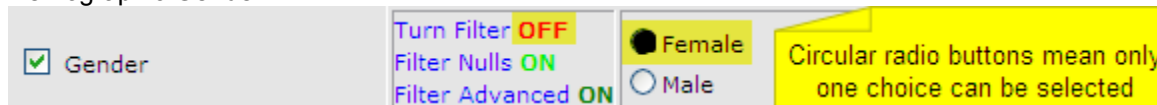| ☑ Date of Birth	Between is an inclusive date filter, greater than and less than are not inclusive	between	Jan 1 1970 today -and- Dec 31 1979 today

- Numeric Filters work very similarly to Date Filters. An example of a Numeric Filter is the Age field, found under the Additional Participant Information focus area. *Note: greater than and less than are not inclusive.*

☑ Age	Greater than, less than, and between	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	Where Age is equal to 18

- Boolean Filters refers to binary (yes/no or true/false) outcomes or responses with only two responses, such as the Standard Demographic Gender.

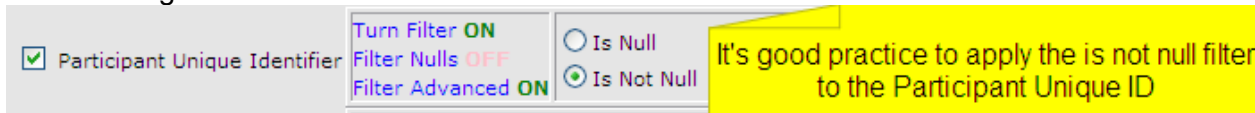| ☑ Gender	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	● Female ○ Male	Circular radio buttons mean only one choice can be selected

9

If more than one filter is utilized in the same query, the logic is AND logic. If one query included all of the filters shown above, the results would include **female** participants with the **last name Jones** who were **born in the 70's** and are **African-American or Asian**. (The age filter was ignored for this example.)

*To capture people born any date after Jan. 1, 1970, filter Date of Birth for greater than the date prior - December 31, 1969. To capture any participant who received efforts prior to December 31, 2008, filter Date of Contact less than the date after – January 1, 2009.

2. **Filter Nulls:** This is the second, or the middle filter. It allows you to filter by responses that either are blank (is null) or are not blank (is not null). Note that the null filter cannot be used in conjunction with the regular filter.

   To improve the speed of queries, always filter by the unique identifier in some way. The example shown here is best if you are not using the advanced filter.
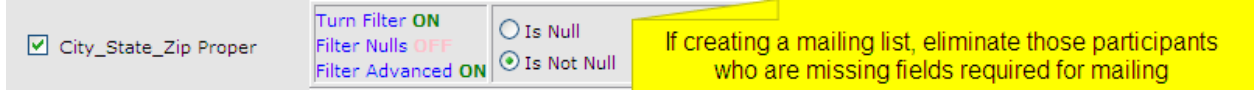
| ☑ Participant Unique Identifier | Turn Filter **ON** Filter Nulls OFF Filter Advanced **ON** | ○ Is Null ⊙ Is Not Null | It's good practice to apply the is not null filter to the Participant Unique ID |

   If looking for a data set that only includes records with data, turn on the null filter and select Is Not Null.
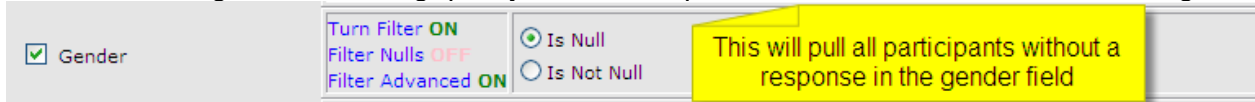
| ☑ City_State_Zip Proper | Turn Filter **ON** Filter Nulls OFF Filter Advanced **ON** | ○ Is Null ⊙ Is Not Null | If creating a mailing list, eliminate those participants who are missing fields required for mailing |

   The null filter is great for building quality assurance queries that show where data is missing.
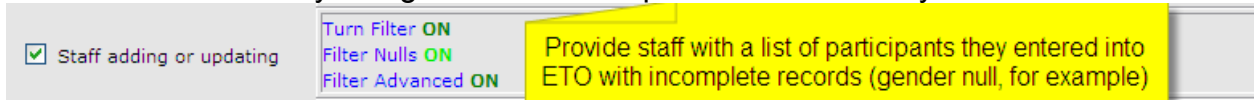
| ☑ Gender | Turn Filter **ON** Filter Nulls OFF Filter Advanced **ON** | ⊙ Is Null ○ Is Not Null | This will pull all participants without a response in the gender field |

   Include the staff name in queries that show records where data elements are null. Then, provide the query results to the staff so that they can go back and complete their data entry.

| ☑ Staff adding or updating | Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON** | | Provide staff with a list of participants they entered into ETO with incomplete records (gender null, for example) |

3. **Advanced Filter:** This is the third, bottom, or last filter. It allows for calculations (i.e. Count, Average, Min, Max, Sum, and Average) – this is an advanced functionality which is covered in detail during the Intermediate Query Wizard recorded training.

- Distinct Count delivers a count of the total number of distinct values that you would get if you were to display all of the values for this focus area. Note that in both examples, the query provides a total of 111 females. However, the query on the left returns 111 records, the query on the right shows just 1 record – that record includes the count of 111.

- <u>Count</u> is an Advanced Filter used to indicate the number of instances of the same value in a set of query results. The count, unlike the distinct count, shows a duplicated number.

The only difference between these queries is the distinct count filter is applied on the left, and count filter on the right. The distinct results tell us how many unique participants received the two types of contact shown. The count shows us how many total times participants received those types of contact. 219 participants were seen in the Face to Face in the Community a total of 2246.

Participant Information

☑ Participant Unique Identifier	Turn Filter **ON** Filter Nulls **ON** Filter Advanced OFF	⦿ Distinct Count ○ Count ○ Min ○ Max
		Filter Group

☑ Contact Location	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	--Select-- Email Face to Face - Community Face to Face - On Site Fax Fire Hall new contact location method Phone

VBScript: Returned Records

Your Query returned 2 Records. Would you like to view these Records?

[Yes] [No]

DISTINCT COUNT OF PARTICIPANT UNIQUE IDENTIFIER ☐	CONTACT LOCATION
219	Face to Face - Community
196	Face to Face - On Site

Participant Information

☑ Participant Unique Identifier	Turn Filter **ON** Filter Nulls **ON** Filter Advanced OFF	○ Distinct Count ⦿ Count ○ Min ○ Max
		Filter Group

☑ Contact Location	Turn Filter **OFF** Filter Nulls **ON** Filter Advanced **ON**	--Select-- Email Face to Face - Community Face to Face - On Site Fax Fire Hall new contact location method Phone

VBScript: Returned Records

Your Query returned 2 Records. Would you like to view these Records?

[Yes] [No]

COUNT OF PARTICIPANT UNIQUE IDENTIFIER ☐	CONTACT LOCATION
2246	Face to Face - Community
1620	Face to Face - On Site

- Min is an Advanced Filter typically used on date fields, such a Program Start Date, or Date of Contact. The min or minimum date is the oldest date (which has the smallest numeric value).

The only difference between these queries is the minimum filter is applied to Program Start Date on the left. The results on the right are duplicated, because if a participant was enrolled in the Family Travel multiple times, that participant shows in multiple rows in the query. 290 participants were enrolled a total of 530 times, the query on the left only shows the first enrollment for each participant.

- Max is an Advanced Filter typically used on date fields, such a Program Start Date, or Date of Contact. The max or maximum date is the most recent or newest date (which has the largest numeric value).

- Sum is used to summarize numeric values found in demographics, assessments, point of service elements, and job information. Boolean fields have numeric values – Yes = 1 and No = 0. In the example below, the user is pulling a list of all participants who have been absent 4 times (by utilizing the Filter Group option). This query will also include home phone number, so that calls can be made to warn participants that after 6 absences, they can no longer attend the program.

Participant Attendance

☐ Attendance Outcome	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**
☐ Date of Contact	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**
☐ Time Spent on Contact	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**
☐ Sessions Scheduled	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**
☐ Sessions Attended	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**
☑ Sessions Absent	Turn Filter **ON** Filter Nulls **ON** Filter Advanced OFF	○ Distinct Count ○ Count ○ Min ○ Max is [equal to ▼] 4 ◉ Sum ○ Average Filter Group

14

- Average is used to average numeric values found in demographics, assessments, point of service elements, and job information (like wage). Boolean fields have numeric values – Yes = 1 and No = 0. In the example below, the user is pulling a list of all participants who have an attendance rate less than 75%. Like the example above, this query was built using the Participant Attendance focus area.

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	AVERAGE OF SESSIONS ATTENDED ☐
7810	Elizabeth	Brown	0.746031
7815	Debbie	Harby	0.722222
8036	Chip	Mete	0.714285
8048	Bob	Smith	0.708333

Step 3C: Submitting the Query
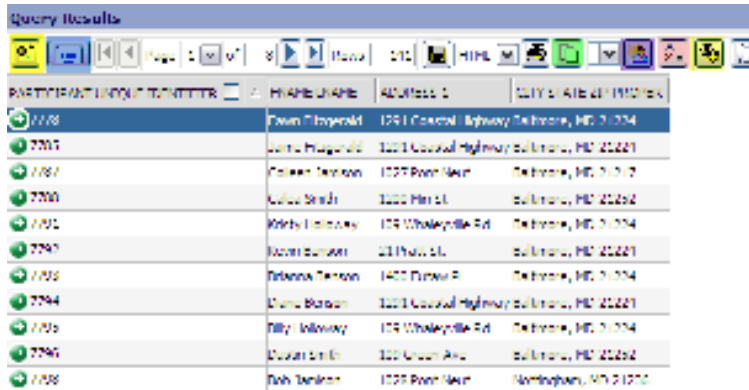
Once the desired selections and filters have been made, click the Submit Query button at the bottom of the page to generate the query results. Remember **additional focus areas cannot be added** to this query. However, **modifications to filters and selections within the existing focus areas can be made** after the query is run and saved.

It is important to remember that by default Queries pull back information from across your entire site (or enterprise for users logged in as enterprise managers) and from both Dismissed and Active Participants. Filters can be applied so that data has a smaller scope or is specific to program history.

A message including the number of records in the query results will appear. Click yes to view the records. If the number of records seems too small or large, it is still recommended that the user click yes. Viewing the results (and then clicking requery once the result set is shown) may be helpful in creating an accurate query. Clicking "No" resets the Query Wizard back to Step 1.

Step 4: Working with Query Results
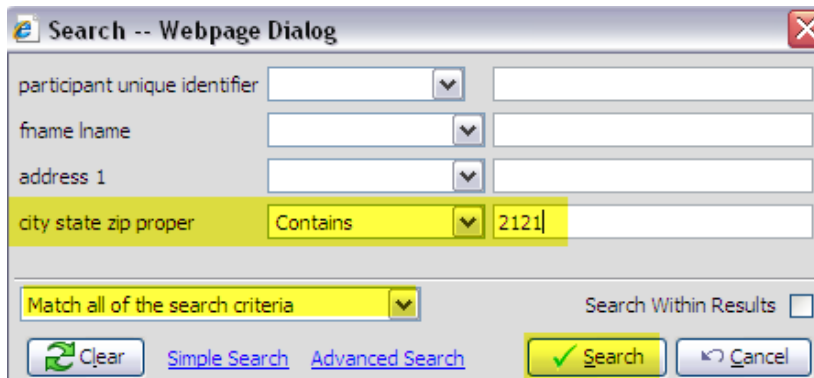
The query results are displayed in a table known as the DB Net Grid. Clicking on the header of any of the columns will sort the grid based on that column. Click the header again to sort in the inverse order. The user may also click and drag a column to insert it into a different part of the grid. If a field contains numeric data, the check box in the header will total the numeric values in the column and show a sum below the grid. There are also several tools available at the top of the grid detailed below:

View the search window, which essentially allows for a query within the query results:

Add a column with row numbers to the grid:

Row#	PARTICIPANT UNIQUE IDENTIFIER ☐ △	FNAME LNAME	ADDRESS 1	CITY STATE ZIP PROPER
1	7778	Fawn Fitzgerald	1291 Coastal Highway	Baltimore, MD 21224
2	7785	Jaime Fitzgerald	1291 Coastal Highway	Baltimore, MD 21224
3	7787	Colleen Jamison	1027 Pont Neuf	Baltimore, MD 21217
4	7788	Calea Smith	1200 Min St	Baltimore, MD 21252
5	7791	Kristy Holloway	109 Whaleyville Rd	Baltimore, MD 21224

Copy the grid to the clipboard, then paste the data into Excel or another format.
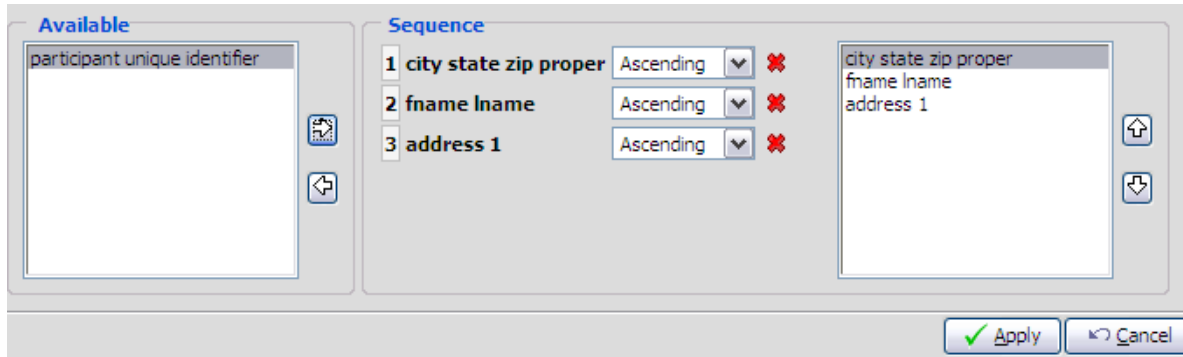
Create a User Profile based on customizations made to the current grid that can be accessed again later (for example always show 100 rows per page in alphabetic order by last name)

User Profiles -- Webpage Dialog

Save profile

[   ] 💾 Save

Select profile

[   ] ⌄

❌ Delete   ✓ Select   ❌ Close

17
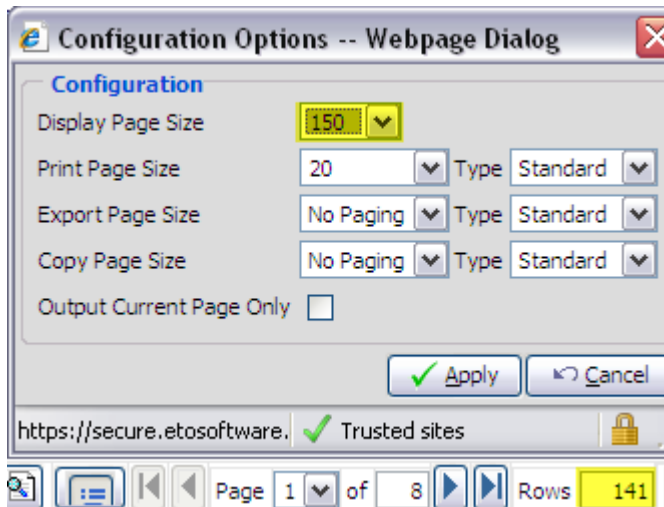
Specify the nesting order: For example, a mailing should be sorted by zip code, then by participant name

Available		Sequence		
participant unique identifier		1 city state zip proper	Ascending ✖	city state zip proper / fname lname / address 1
		2 fname lname	Ascending ✖	
		3 address 1	Ascending ✖	

✓ Apply   ↩ Cancel

Resize the page to view all rows on one page: 150 is closest option greater than 141 rows shown below

Configuration Options -- Webpage Dialog

Configuration

Display Page Size   150

Print Page Size   20   Type Standard

Export Page Size   No Paging   Type Standard

Copy Page Size   No Paging   Type Standard

Output Current Page Only   ☐

✓ Apply   ↩ Cancel

https://secure.etosoftware.   ✓ Trusted sites

Page 1 of 8   Rows   141

18

Reset Grid
Click Reset Grid to erase all modifications made to the grid results, such as sorting or resizing.

Work with Data
| Start Over | Download .txt file of Results | Save Query | Reset Grid | Requery |
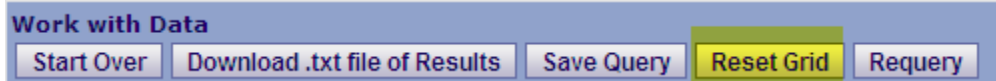
Re-querying
Click Requery to return to Step 3 of the Query Wizard. Filters and selections can be removed or added as necessary. Note that on the Requery page, you have the ability to sequence the output (from left to right, 1-the number of columns).

Work with Data
| Start Over | Download .txt file of Results | Save Query | Reset Grid | Requery |
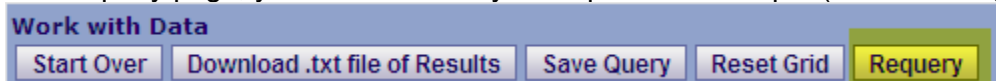
Start Over
Click this as a shortcut to the Query Wizard

Work with Data
| Start Over | Download .txt file of Results | Save Query | Reset Grid | Requery |
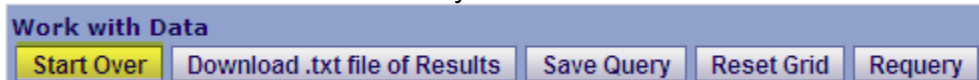
Download .txt file of Results
This will open an Excel spreadsheet with the results, but without the column headers.

Work with Data
| Start Over | Download .txt file of Results | Save Query | Reset Grid | Requery |
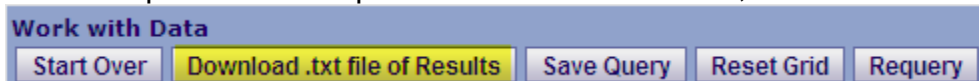
Grouping Data

Drag a column header here to group by that column

Drag a column header here to chart by that column

Page 1 ▾ of 8 ▶ ▶| Rows 141	HTML ▾		

PARTICIPANT UNIQUE IDENTIFIER ☐ △	FNAME LNAME	ADDRESS 1	CITY STATE ZIP PROPER
→ 7778	Fawn Fitzgerald	1291 Coastal Highway	Baltimore, MD 21224
→ 7785	Jaime Fitzgerald	1291 Coastal Highway	Baltimore, MD 21224
→ 7787	Colleen Jamison	1027 Pont Neuf	Baltimore, MD 21217
→ 7788			Baltimore, MD 21252
→ 7791			Baltimore, MD 21224
→ 7792			Baltimore, MD 21224
→ 7793	Brianna Benson	1400 Eutaw Pl	Baltimore, MD 21224
→ 7794	Diane Benson	1291 Coastal Highway	Baltimore, MD 21224

Drag and drop the column you want to group by

city state zip proper △	Count_of_Records
⊞ Baltimore, MD 21202	2
⊞ Baltimore, MD 21206	1
⊞ Baltimore, MD 21209	3
⊞ Baltimore, MD 21210	23
⊞ Baltimore, MD 21211	23
⊞ Baltimore, MD 21212	2

Grouping is essentially counting records that are alike within the specified column.

city state zip proper △	Count_of_Records
⊟ Baltimore, MD 21202	2

participant_unique_identifier △	fname_lname	address_1_
8282	Spencer Antonio	380 Bayside Rd
9147	James Brown	111000 Pratt St

⊞ Baltimore, MD 21206	1
⊞ Baltimore, MD 21209	3

Click the toggles/plus signs to see the details behind the group or count.

20

Drag a column header here to group by that column

Drag a column header here to chart by that column

| Count_of_Records | city state zip proper |

Chart selection Pre-selected chart mode (Bar) [v] Chart

Query Results

[icons] K ◄ Page 1 [v] of 1 ► ►l Rows 20

city state zip proper	Count_of_Records
+ Baltimore, MD 21202	2
+ Baltimore, MD 21206	1
+ Baltimore, MD 21209	3
+ Baltimore, MD 21210	23

Once query results have been grouped, drag and drop box columns "to chart by that column"

Select the type of chart to be generated and click chart.
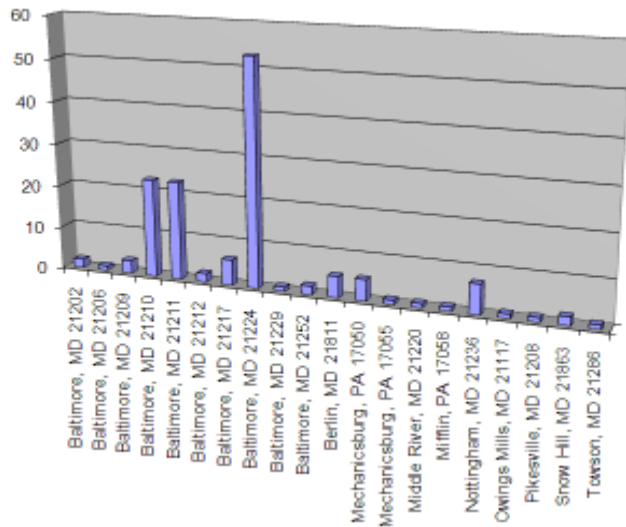
Click ok to copy the information and run the Excel to generate the chart. Note that the default screen in Excel is the first tab in the notebook. Click the second tab (labeled chart) to view the query data in chart form.

21

2177 Boston St. Suite 300
The Foxley Building 3rd Floor
Baltimore, MD 21274

Phone: 410-252-7660
Toll Free: 866-732-3999
Fax: 410-252-7561

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Step 4: Understanding Query Results

Please remember that results are DISTINCT! Distinct is a way of filtering out duplicate information.

For example, a participant with two or more identical records will only appear once in the results.

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME ☐	PARTICIPANT LAST NAME ☐	DATE OF CONTACT ☐
8280 Marcus		Antonio	06/09/2009

To make identical records appear separately, pull in a data element that would make them unique from one another, such as Time Stamp of Effort (found in the Outcome Details focus areas).

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	DATE OF CONTACT	TIME STAMP OF EFFORT
8280 Marcus		Antonio	06/09/2009	17:55:21
8280 Marcus		Antonio	06/09/2009	17:55:29
8280 Marcus		Antonio	06/09/2009	17:55:36

The top query leads the user to believe that the participant has one effort recorded for 6/9/09, when in fact, there were 3 efforts recorded for that participant on that date (based on the time stamp).

Step 5: Saving and Managing Queries

Work with Data

| Start Over | Download .txt file of Results | Save Query | Reset Grid | Requery |
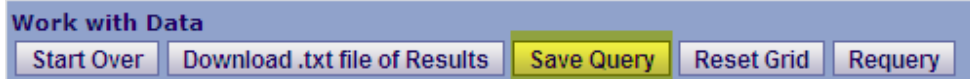
Saving Queries to run again

Any query can be saved to be run at a later date instead of rebuilding it each time. Click "Save Query" at the top of the results screen, and a small, secondary browser window will pop-up.

Query Name: [   ]

Insert as Foci: ☐

Description:
[   ]

Select Scope of Query [Program Access ▾]

Detail Information	Selected	Prompted
Participant Information		
Participant Unique Identifier	☑	☐
FName LName	☑	☐
Participant Mailing		
Address 1	☑	☐
City_State_Zip Proper	☑	☐

[Save Query]

Name - What should the query be called? Try to keep names brief and limit symbol usage

Description-Tips for what data is inside the query, or how to utilize prompts. It also appears on the Manage Queries page.

Scope-Should the query pull data on the selected program, the site, or enterpise

Selected-which data elements should have a column in the query results?

Prompted-what parameters need to be set each time the query is run (typically dates) - using prompts will make the description appear when the query is run in the future)

(Insert as Foci is covered later)

*It is common for users saving queries to leave the scope on the default selection of program. However, site is typically the accurate scope selection. If the saved query with is going to be shared to users across the site, the scope of the query will not respect confidentiality based on program information assigned to staff accounts. Scope can always be modified at the top of the edit query page (accessed from the Manage Queries page).

Managing Queries (found under Site Administration)

| Query Wizard | Query Wizard(Beta) | Manage Custom Focus Areas |
| Build | View Composite Query Reports Build | View DashBoard Component | View Scheduled Reports |

Query Name (Show DISABLED Queries)	Created By	Status							
Breakdown - Gender and Age **Description:** Select the age you want to see the gender breakdown for	Caitlin Smith	Enabled	Shared (change)	Update	Edit	Delete	Copy	Shown in Drop Down
By Group Start Date	Caitlin Smith	Enabled	Restricted (change)	Update	Edit	Delete	Copy	Shown in Drop Down
By Job Start Date	Caitlin Smith	Enabled	Restricted (change)	Update	Edit	Delete	Copy	Not Shown in Drop Down
Dashboard Date of Last Contact	Caitlin Smith	Enabled	Restricted (change)	Update	Edit	Delete	Copy	Not Shown in Drop Down

Query Wizard | Query Wizard(Beta)   Links to the query wizard feature.

Manage Custom Focus Areas   Click here to delete custom focus areas (described later in this manual).

Build | View Composite Query Reports Build   Composite Queries contain the number of records for a maximum of 12 selected periods (typically months). View the recorded training on Composite Queries and Dashboards to learn more.

View DashBoard Component   Dashboard reports are built with queries and appear on the home page. View the recorded training on Composite Queries and Dashboards to learn more.
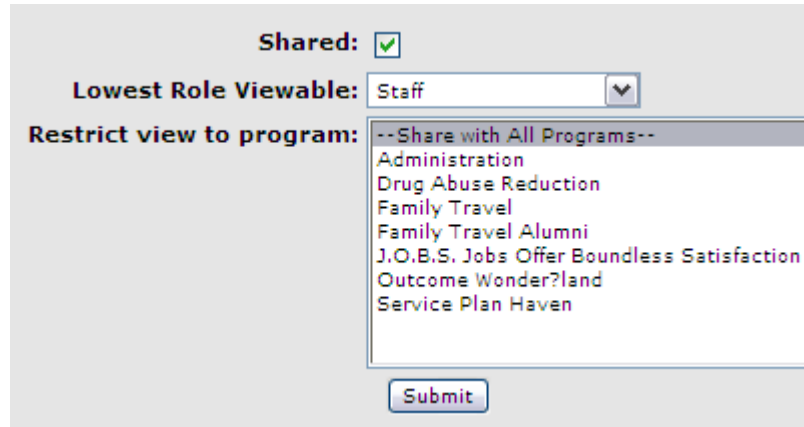
View Scheduled Reports   A query that takes too long to run becomes a scheduled report. Users will receive an email when the scheduled report is ready and it will be visible on the Custom Reports page. Click here to see the links to previously scheduled reports.

(Show DISABLED Queries)   By default, only enabled queries are visible; click to show those queries that are disabled.

Enabled   Click enabled to disable a query that won't be used regularly. Re-enable it by clicking Show Disabled
               Queries in blue in the upper left corner and clicking where it reads Disabled

Shared: ☑

Lowest Role Viewable: Staff ▾

Restrict view to program: --Share with All Programs--
Administration
Drug Abuse Reduction
Family Travel
Family Travel Alumni
J.O.B.S. Jobs Offer Boundless Satisfaction
Outcome Wonder?land
Service Plan Haven

Submit

Restricted
(change)
               Click change to share a query with other users (including other Site Administrators). This will make the query
               accessible on the Custom Reports feature. To make access even easier, add the query to the My Favorites tab at the
               top of the screen.

Update   Change the name or description of the query.

25

Edit Edit a Query to change the scope, and to add or remove prompts, selections, or filters.
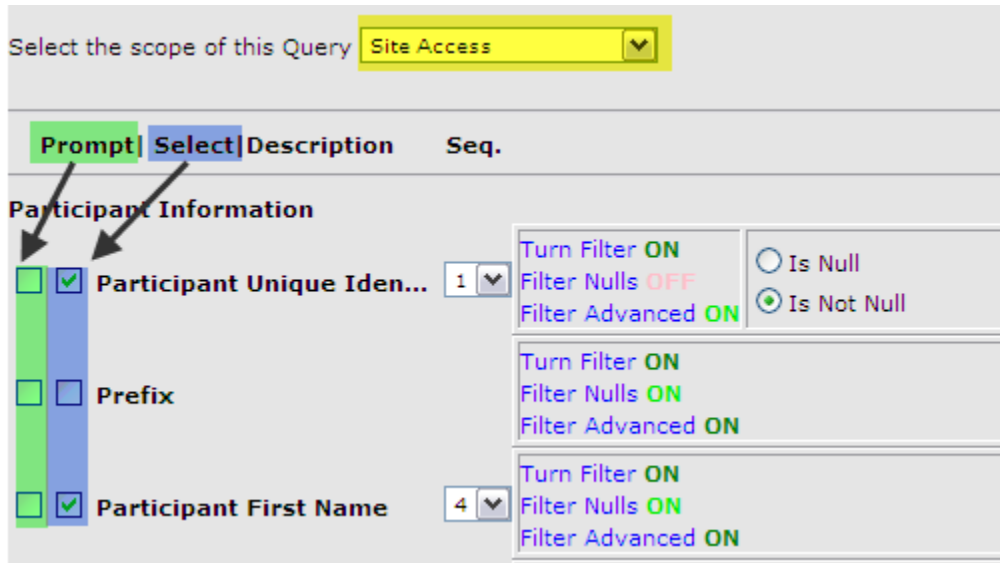
Delete Delete a Query to permanently remove it from your system.

Copy Copy a Query if there is a Query that needs to be modified, but are apprehensive that an mistake might be made while editing, or if 2 or more Queries need to be formatted similarly, though not exactly the same.
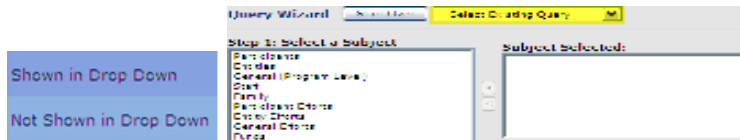
By default, queries show in the user's "Select Existing Query" drop box on the Query Wizard page, but those that are needed on a regular basis can be toggled to not show in the drop box.

26

Advanced Query Functionality

INSERT AS FOCI:

Insert as foci will create a focus area that will appear on Step 2 of the Query Wizard on your site; all users of the query wizard will see the additional foci. The Foci will be built based upon the query that was just run. A very small percentage of ETO users will need to learn how to create custom Foci.

Custom Foci are helpful in finding out where specific data is missing. For example, let's say we need to determine which participants over the age of 18 have NOT HAD a particular value recorded on a Point of Service. If the need was simply for participants who have not had a particular value recorded on a Point of Service, the ETO Report could probably fit the bill. The addition of the age component requires the building of a custom focus area.

The first step is to build a query that contains participants who HAVE HAD the value recorded. Be sure to select the Unique Identifier, and filter for is not null.

☑ Participant Unique Identifier | Turn Filter **ON** | ○ Is Null
Filter Nulls OFF | ⦿ Is Not Null
Filter Advanced **ON**

Save the Query and click the box to Insert as Foci

Query Name: _____
Insert as Foci: ☑
 --> Due to our offline reporting server restrictions, you must wait for the database to refresh before you can use this custom focus area.
The database refreshes every 15 minutes by the clock, i.e. 1:00, 1:15, 1:30. Please wait until after the next refresh to run a new query using this focus area.

Wait for the refresh period (the quarter of the hour must pass). Build a query including Participant Information, the new Custom Focus Area, which will appear toward the bottom of the list, and any other applicable focus area for the query in question.

Filter for Is Null on the Unique Identifier within the custom focus area, and filter for any other fields needed (such as age in this example)

☑ Participant Unique Identifier__people_w_report_car... | Turn Filter **ON** | ⦿ Is Null
Filter Nulls OFF | ○ Is Not Null
Filter Advanced **ON**

27

2477 Boston St, Suite 300
The Foundry Building 3rd Floor
Baltimore, MD 21224

Phone: 410-752-7660
Toll Free: 866-732-3680
Fax: 410-752-7861

Atlanta   Austin | Baltimore   Denver   New York   San Diego
www.socialsolutions.com

Query Wizard Tips:

To avoid being forced to filter for a specific program, utilize the "by Name" data elements, which will allow for an "is Like" filter, which will pull data from across programs (or sites for Enterprise Managers).

List of focus areas containing "by Name" elements: Participant Information, Group History, Program History, Participant Assessments, Participant Outcomes Details Active, Custom Demographics By Name
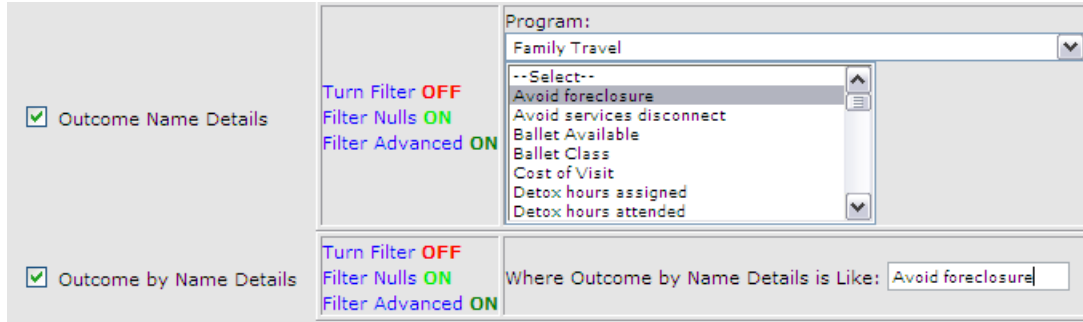
Select the Unique Identifier to appear in query results – when the green arrow is clicked, Quick Links can be accessed. Many customers build queries with prompts for search criteria, such as custom demographics for Case Manager or Nickname. These types of queries make for useful custom reports available to staff.
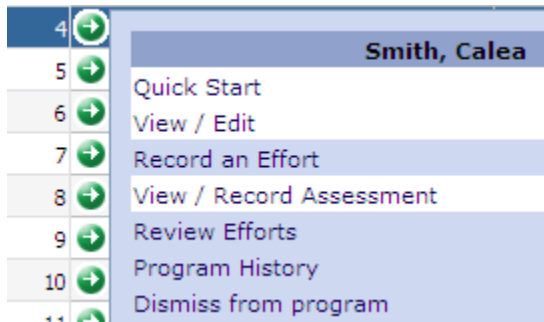
Examples of Frequently Built Queries

- **Mailing List**

Step 3:

The fields for Participant First Name and Participant Last Name were unchecked, and FName LName was checked so that only 1 column is returned in the results rather than 2

Address 2 was not checked because the Participants do not have information in that field on this site. The Is No Null filter was applied on the City, State, Zip Proper field so only Participants with data in those fields are returned. Like the name field, this field combines 3 data point into 1.

Results:

FNAME LNAME	ADDRESS 1	CITY STATE ZIP PROPER
Reid Lawrence	9928 Catydid Ct	Snow Hill, MD 21863
Alfonzo Marquez	920 Portside Rd	Baltimore, MD 21209
Jonathan Jeffers	90 Conscience Way	Baltimore, MD 21217
Heather King	85 Main Street	Mechanicsburg, PA 17050
Janice Benson	82 Main Street	Mechanicsburg, PA 17050
Allison Jackson	77 Main Street	Mechanicsburg, PA 17050
Jordan Robinson	6328 Main St	Baltimore, MD 21210

- **Participants Missing Demographics**

Step 3:

Results:

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	STAFF ADDING OR UPDATING △	DATE ADDED
➔ 12996	Eamon	Cusic	Attendee, Training	6/8/2007
➔ 13024	Tim	Waggoner	Attendee, Training	6/8/2007
➔ 13025	Matt	Schubert	Attendee, Training	6/8/2007
➔ 13910	Jo	Smith	Attendee, Training	8/6/2007
➔ 18092	Gina	Clarkson	Attendee, Training	11/14/2008

- **Active in a Date Range**

30

SocialSolutions | ETOSOFTWARE

relating efforts to outcomes·

Query Wizard

Start Over   -- Select Existing Query --

Step 1 (Subject):   Participants

Select a Subject   **Subject Selected:**

Entities
General (Program Level)
Staff
Family
Participant Efforts
Entity Efforts
General Efforts
Funds

Participants

>

<

Step 1

Select a Focus Area   Focus Areas Selected:

Participant Mailing
Custom Demographics
Age
Active Program
Clients in Multiple Programs
Most Recent Program Start Date
Participant Assessments
Assessments Listed
Assessments Listed (Most Recent)
Assessments Listed Across Sites
Group History
Active Group Members

Participant Information
Program History

>

<

Step 2

Step 3:

Select|Description
Program History   Filter

☑ Program   OFF   ON   ON

Filter for the program or programs - if more than 1 program is selected, uncheck the box or results will be duplicated

Eamon (DISABLED)
EBDI Model (DISABLED)
Erika Jones (DISABLED)
Family Travel
Family Travel Alumni
Franke (DISABLED)
Groves (DISABLED)
Helene (DISABLED)

☑ Program Start Date   Turn Filter OFF   Filter Nulls ON   Filter Advanced ON   less than   01/01/2009

☐ End Date   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

This date range will pull all participants active in 2008 (start date is less than last date in range, term date for active is greater than the first date in the range). For a duplicated count, keep the boxes selected, for an unduplicated count, uncheck the boxes

☐ Graduated   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

☐ Termination Reason   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

☑ Term Date for Active   Turn Filter OFF   Filter Nulls ON   Filter Advanced ON   greater than   12/31/2007

Select|Description
Participant Information   Filter

☑ Participant Unique Identifier   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

☐ Prefix   ON ON ON

Leave the fields checked by default

☑ Participant First Name   ON ON ON

☐ Participant Middle Initial   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

☑ Participant Last Name   Turn Filter ON   Filter Nulls ON   Filter Advanced ON

Results:

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	PROGRAM	PROGRAM START DATE △	TERM DATE FOR ACTIVE
➡15900	Costa	Scott	Family Travel	3/26/1992	6/17/2009
➡16215	James	Joyce	Family Travel	4/23/1996	6/17/2009
➡16285	Jaime	Smitherines	Family Travel	3/26/2006	6/17/2009
➡16216	Maura	Bigham	Family Travel	2/25/2007	6/17/2009
➡10591	Bob	Banks	Family Travel	4/18/2007	6/17/2009

31

Atlanta   Austin | Baltimore   Denver   New York   San Diego

www.socialsolutions.com

- **Received Contact with Specific Contact Location Method in a Date Range**

Query Wizard

Start Over -- Select Existing Query --

Step 1 (Subject):   Participants

Select a Subject   **Subject Selected:**

Entities
General (Program Level)
Staff
Family
Participant Efforts
Entity Efforts
General Efforts
Funds

Participants

>
<

Step 1

Select a Focus Area   **Focus Areas Selected:**

Most Recent Program Start Date
Participant Assessments
Assessments Listed
Assessments Listed (Most Recent)
Assessments Listed Across Sites
Group History
Active Group Members
Particpant Outcomes Details All
Participant Outcomes
Participant Outcomes Starting
Participant Outcomes Last
Participant Outcome Cummulative

Participant Information
Participant Outcomes Details Active

>
<

Step 2

Step 3:

Select| Description
Participant Information   **Filter**

☑ Participant Unique Identifier   Turn Filter   ON
                                    Filter Nulls   ON
                                    Filter Advanced ON

☐ Prefix   ON
                                    ON
                                    ON

☑ Participant First Name   ON
                                    ON
                                    ON

☐ Participant Middle Initial   Turn Filter   ON
                                    Filter Nulls   ON
                                    Filter Advanced ON

☑ Participant Last Name   Turn Filter   ON
                                    Filter Nulls   ON
                                    Filter Advanced ON

Leave the fields checked by default

d
a
n
c
e

A

☑ Outcome Name Details   Turn Filter   **OFF**
                            Filter Nulls   **ON**
                            Filter Advanced **ON**

Program:
Family Travel

Track choral practice
Track drama attendance
Track employment workshops
Track family counseling services
Track Family Prep Sessions
Track French Class Attendance
Track Hours of French Practicum Offered
Track Hours of French Practicum Taken

☐ Outcome by Name Details   Turn Filter   **ON**
                             Filter Nulls   **ON**
                             Filter A

☐ Composite Name

☐ Composite by Name

The results will include all participants receiving face to face efforts on any Point of Service in the Family Travel program. The date of contact will also be listed as a reference.

☑ Date of Contact

☐ Outcome Category   Turn Filter   **ON**
                             Filter Nulls   **ON**
                             Filter Advanced **ON**

☐ Time Spent on Contact   Turn Filter   **ON**
                             Filter Nulls   **ON**
                             Filter Advanced **ON**

--Select--
Email
Face to Face - Community
Face to Face - On Site
Fax
Fire Hall

☑ Contact Location   Turn Filter   **OFF**
                             Filter Nulls   **ON**
                             Filter Advanced **ON**

Results:

PARTICIPANT UNIQUE IDENTIFIER ☐ △	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	OUTCOME NAME DETAILS	DATE OF CONTACT	CONTACT LOCATION
7778	Fawn	Fitzgerald	Track French Class Attendance	4/3/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	4/4/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	4/6/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	4/15/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	4/20/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	4/29/2006	Face to Face - On Site
7778	Fawn	Fitzgerald	Track French Class Attendance	8/24/2006	Face to Face - Community
7778	Fawn	Fitzgerald	Track Hours of French Practicum Offered	9/8/2006	Face to Face - On Site

- **Attendance Average**

Step 3:

SocialSolutions | consultant of ETOSOFTWARE®

relating efforts to outcomes:

Program:

Family Travel

Track choral practice
Track drama attendance
Track family counseling services
Track French Class Attendance
Track math tutoring
Track online training attendance
Track Parenting Class Attendance
Track Wine Tasting Attendance

Attendance Outcome
Turn Filter OFF
Filter Nulls ON
Filter Advanced ON

Note that the filters are used but the boxes are unchecked

Date of Contact
Turn Filter OFF
Filter Nulls ON
Filter Advanced ON
between -and-
06/1/2008
06/01/2009

Time Spent on Contact
Turn Filter ON
Filter Nulls ON
Filter Advanced ON

Sessions Scheduled
Turn Filter ON
Filter Nulls ON
Filter Advanced ON

Sessions Attended
Turn Filter ON
Filter Nulls ON
Filter Advanced OFF

○ Distinct Count ○ Count
○ Min   ○ Max
○ Sum   ⊙ Average
Filter Group

Results:

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	AVERAGE OF SESSIONS ATTENDED ☐
7778	Fawn	Fitzgerald	0.714285
7784	Caitlin	Stafford	0.75
7785	Jaime	Fitzgerald	1
7786	Fred	Smith	0.75
7787	Colleen	Jamison	0.9
7788	Calea	Smith	0.941176
7789	Luke	Trump	0.875

The decimal point can be moved over to places to the right for percentage of attendance

34

- **An Assessments Listed example**

Query Wizard

Start Over   -- Select Existing Query --

Select a Subject

Entities
General (Program Level)
Staff
Family
Participant Efforts
Entity Efforts
General Efforts
Funds

Subject Selected:

Participants

> Step 1

Step 1 (Subject):   Participants

Select a Focus Area

Program History
Active Program
Clients in Multiple Programs
Most Recent Program Start Date
Participant Assessments
Assessments Listed (Most Recent)
Assessments Listed Across Sites
Group History
Active Group Members
Participant Outcomes Details Active
Particpant Outcomes Details All
Participant Outcomes

Focus Areas Selected:

Participant Information
Assessments Listed

> Step 2

Step 2, continued

Select a Assessment Area

CrossTabPractice
Eamon Leadership Assesment
Education and Employment History
Education Assessment
Financial Management
Follow Up Needs Assessment (4 months
French Post-Test
French Pre-Test
GED Attendance
Geriatric Depression Scale
Girl Scout Badges
Intake

Focus Areas Selected:

Employment Assessment

> Select one or more assessments to query

Step 3:

Select|Description
Assessments Listed

Employment Assessment

> Click the assessment name to expand the questions

Employment Assessment

☐ Identifier Employment Assessment	Turn Filter **ON** Filter Nulls **ON**		
☑ Survey Date Employment Assessment	Turn Filter **OFF** Filter Nulls **ON**	less than	06/17/2009
☑ I have worked these types of jobs in the past ...	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**		
☑ I would like to work these types of jobs	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**		
☑ I believe it is important to have a full time job ...	Turn Filter **ON** Filter Nulls **ON** Filter Advanced **ON**		

35

2477 Boston St. Suite 360
The Foxley Building 3rd Floor
Baltimore, MD 21224

Phone: 410.752.5660
Toll Free: 866.732.3560
Fax: 410.252.7561

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Results:

PARTICIPANT UNIQUE IDENTIFIER ☐	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	SURVEY DATE EMPLOYMENT ASSESSMENT ▽	I HAVE WORKED THESE TYPES OF JOBS IN THE PAST
➔ 7883	Sally	Clark	10/6/2008	Food Service
➔ 7836	Priya	Anju	6/22/2008	Auto Mechanic

Focus Area Details by Subject

Participant Focus Areas

Participant Information	
Participant Unique Identifier	exclusive number generated by the software which differentiates between participants who may have the same name.
First Name	will search for Participant First Name only
Middle Initial	will search for Participant Middle Initial only
Last Name	will search for Participant Last Name only
Name	last name comma first name, or partial first name
FName LName	first name followed by last name
SSN	111111111 format
Date of Birth	greater than = more recent than date entered, less than = prior to date entered (To filter by Age use the Focus Area Area "Additional Participant Info")
Gender	male or female
Race	hold the control key to select more than one
Case Number	number provided by user, or unique identifier automatically assigned by software
Funding Source	found in feeder table on Add or View/Edit Participant screen
Referral Source	found in feeder table on Add or View/Edit Participant screen
Marital Status	hold the control key to select more than one
Staff adding or updating	generated by user name, staff name is stamped when adding/editing participant record (program specific)
Date Added	date Add New Participant - the actual date when the record was initially added to the software
Date Last Updated	date Participant's demographic information was last updated
Home Phone	filter by area code
Cell Phone	filter by area code
Work Phone	filter by area code

Work Phone Ext	starting number of extension through entire extension
Pager	filter by area code
Email	partial through entire email address
Assigned Staff	Name of staff assigned to participant

Participant Mailing	
Address 1	partial or entire
Address 2	partial or entire
Filtering State and City	
Zip Code	5 digit formatless/equal/not equal/greater/between (enter two zips)
City State Zip Proper	should on be listed, not filtered – use zip code for filtering area
City	populated by Zip code
State	populated by Zip code
County	populated by Zip code
Mailing Email	partial or entire

Custom Demographics	
All Custom Demographics in your site.	Filters vary according to type of demographic.

Age	
The results are generated by the Date of Birth entered in Participant demographics.	

Program History	
Program	in which Participant is enrolled
Program Start Date	date entered when Participant started Program
End Date	Program Dismissal Date
Successfully Completed	(May also be called Graduated.) "successfully completed" check box used in dismissals
Reason for Dismissal	(May also be called Termination Reason.) generated by feeder table that is customizable
Term Date for Active	participant must be enrolled in at least one program
Projected Termination Date	projected termination date if applicable

Days in Program	number of days from program start date to present OR number of days from program start date to dismissal (termination) date
Program by Name	can be used when multiple programs have similar names (filter by partial program name)
Program Type	This field is an optional item used to group programs together under a common type populated through a feeder table.
Program History Staff Name	The staff account who most recently modified a participant's program history by enrolling or dismissing them (or editing the record).

Active Program	
Active Program	name of program Participant is currently enrolled in
Program Start Date	date Participant was enrolled in program
Program Name	name of program Participant is currently enrolled in
Projected Termination	date entered as Projected Termination
Days in Program	from enrollment date to present date

Clients in Multiple Programs	
Count of Programs Current	number of programs in which participant is currently enrolled
Count of Programs All	number of programs in which participant **has ever been** enrolled

Most Recent Program Start Date	
Queries the most recent start date for each participant across programs	

Participant Assessments	
Assessment Name	choose from feeder table with site-wide assessments
Assessment Question	must First choose assessment, then feeder table will be populated with text of questions
Assessment Comment Question	prompt entered when solicit comment box is selected following assessment question
Comment Response	any comment response that is like
Assessment Choice Response	filters questions with choice response, may filter for specific choice
Assessment Text	partial or entire

39

2477 Boston St. Suite 300
The Foxley Building 3rd Floor
Baltimore, MD 21224

Phone: 410.252.7500
Toll Free: 866.732.3560
Fax: 410.252.7501

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Response	
Assessment Numeric Response	
Assessment Date Response	filters questions with date response, may filter for date
Assessment Yes No Response	filters questions with yes/no response, may filter for either yes vs. no
Assessment Entity Cross Reference	search for entity name
Assessment Participant Cross Reference	search for participant name
Staff completing Assessment	generated by user login
Date assessment Taken	Date the assessment was taken

Assessments Listed
All Participant Assessments in your site

Group History	
Group	Name of group
Group Start Date	Date group started
Group End Date	Date group ended
Termination Reason	

Active Group Members	
Contains information on Active Group Members	

Participant Outcome Details	
Outcome Name Details	Filter prompts user to select one program and outcome(s) within that program
Outcome by Name Details	allows user to run a query for an outcome that exists in more than one program
Composite Name	Filter prompts user to select one program and composite outcome(s) within that program
Composite by Name	Filter is arbitrary text and allows user to run a query for a composite outcome that exists in more than one program
Date of Contact	date which effort was recorded for outcome
Outcome Category	This feature can be used to group outcomes together into a specific category instead of having to filter on all the individual outcomes in that category
Time Spent on Contact	in minutes
Contact Location	choose from feeder table
Numeric Value	numeric outcomes
Boolean Value	yes/no outcomes
String Value	value driven outcomes
String Weight	For Outcomes built as type Values with weights
Notes	partial or entire
Next Contact Date	date of next contact
Outcome Detail Staff	generated by user login, choose from feeder table
Program	program(s) within outcome exists
Funding Entity	entered as demographic funding source, choose from feeder table

Funding Entity Type	entered as attribute, choose from feeder table
Date Recorded	Date effort was entered into the system
Time Stamp of Effort	generated when Record Effort button is clicked
Contact First Name	For Participant/Entity Match Outcomes
Contact Last Name	For Participant/Entity Match Outcomes

Participant Outcomes	
Total Time in minutes	aggregated time in minutes
Total Contacts	number of times outcomes was recorded
Outcome Name	select program and then outcome name(s)
Outcome by Name	partial or entire outcome name
Outcome Category	This feature can be used to group outcomes together into a specific category instead of having to filter on all the individual outcomes in that category.
Starting Value	initial value entered for all outcomes
Starting String Value	initial value entered for string value outcome
Starting Boolean Value	initial value entered for yes/no value outcome
Starting Numeric Value	initial value entered for numeric value outcome
Ending Value	most recent value entered
Ending Weight	Last weight entered associated with value driven outcome
Ending String Value	most recent value entered for string value outcome
Ending Boolean Value	most recent value entered for yes/no value outcome
Ending Numeric Value	most recent value entered for numeric value outcome
Cumulative Numeric Value	breakdown of numeric values assigned and when
Cumulative Yes No	breakdown of yes/no values assigned and when
First Contact Date	date first effort was recorded with outcome
Last Contact Date	date most recent effort was recorded with outcome

Participant Outcomes Starting	
Outcome Name First	Filter prompts user to select one program and outcome(s) within that program. Filtering for a specific outcome will pull only those participants who have had an effort recorded with that outcome.

Outcome by Name	Allows user to run a query for an outcome that exists in more than one program. For example, if you have an outcome with the same name in more than one program, type the name of the outcome in the box and it will pull from any outcomes matching the text you type in the filter.
Starting Value	Allows user to query for string values that appear in Outcomes across more than one Program. If box is checked without filtering the field will pull the first value recorded for any type of outcome, including Yes/No or Numeric.
Starting String Value	First value entered for value driven outcome
Starting Boolean Value	First value entered for yes/no outcome
Starting Numeric Value	First value entered for numeric outcome

Participant Outcomes Last	
Last Value Information	

Participant Outcomes Cummulative	
Cummulative Information	

Participant Attendance	
Participant Attendance	This focus area pulls from data entered into Outcomes created with the Outcome Wizard with the type Attendance
Helpful Hint	Use the Advanced filter to get a Sum or Average of the Sessions Scheduled, Attended or Absent
Attendance Outcome	Name of Outcome created with the Outcome Wizard with the type Attendance
Date of Contact	
Time Spent on Contact	in minutes
Sessions Scheduled	All attendance efforts recorded for participant
Sessions Attended	Attendance efforts recorded Yes (or Present) for participant
Sessions Absent	Attendance efforts recorded No (Absent) for participant
Group Name	Managed Group selected for attendance effort recorded
Family Name	Family selected for attendance effort recorded

Last Contact Information	
Last Outcome	name of outcome most recently recorded
Last Date of Contact	date most recent effort was recorded
Last Composite Name	name of composite outcome most recently recorded
Last String Value	most recent value assigned for Value Driven outcome
Last Yes No Value	most recent value assigned for Yes/No outcome

Last Numeric Value	most recent value assigned for Numeric outcome
Last Contact Location	contact location of most recent outcome recorded
Last Outcome or Composite Names	search by full or partial outcome name
Last Time on Contact	in minutes, time spent on contact for most recent outcome recorded
Last Next Contact Date	date of next contact assigned for most recent outcome recorded
Last Notes	partial to entire text from notes for most recent outcome recorded
Staff Name	generated by user login

Most recent Date of Next Contact	
Outcome Name Details	Filter prompts user to select one program and outcome(s) within that program
Outcome by Name Details	allows user to run a query for an outcome that exists in more than one program
Composite Name	Filter prompts user to select one program and composite outcome(s) within that program
Date of Contact	date which effort was recorded for outcome
Time Spent on Contact	in minutes
Last Value	Most recent value
Next Contact Date	date of next contact
Outcome Detail Staff	generated by user login, choose from feeder table
Program	program(s) within outcome exists

Composite Outcomes Listed
All Composite Outcomes

Legal Outcomes	
Legal Case Number	case number
Open Date	date case was opened
Close Date	date case was closed
Respondents	last name
Respondents First Name	first name
Number Affected	number of participants involved in case
Legal Contact Date	date contact took place
Date of Next Contact	date of next contact assigned when recording legal contact
Notes on Contact	search by full or partial notes
Problem – Need	list created in Manage Feeder Tables

Case Funding	list created in Manage Feeder Tables
Disposition Closed Case	list created in Manage Feeder Tables
Unit – Office	list created in Manage Feeder Tables
Client Benefit	list created in Manage Feeder Tables
Closed Case	differentiates between open and closed case
Contact Method	list created in Manage Feeder Tables
Contact Type	list created in Manage Feeder Tables
Relief	list created in Manage Feeder Tables
Outcome	select one or more using Ctrl key
Outcome Reason	select one or more using Ctrl key
Contact Funding	list created in Manage Feeder Tables
Legal Outcome Staff	generated by user login

Job Information	
Employer Name	name of employer
Employer Type	choose from feeder table
Entity Sub Type	choose from feeder table
Job Start Date	greater/less/equal/not equal/between date(s)
Job Termination Date	greater/less/equal/not equal/between date(s)
Days on Job	from start date to present date or termination date
Number of Advancements	if advancements (wage/hours/benefits) were made
Placement Type	choose from feeder table
Job Dismissal Reason	choose from feeder table
Previous Employment	yes or no
Wage Start	based on hourly rate first entered
Wage End	based on hourly rate last entered
Hours Per Week Start	based on scheduled hours per week first entered
Hours Per Week End	based on scheduled hours per week last entered
Employment Status Start	originally designated as full time/part time/seasonal
Employment Status End	most recently designated as full time/part time/seasonal
Notes End	last notes entered, search all or partial
Benefit Type Start	choose from feeder table
Benefit Type End	choose from feeder table

Notes Start	first notes entered, search all or partial
Job Title Start	initial job title entered
Job Title End	most recent job title entered (used if participant receives a promotion)
Custom Defined Placement	custom employment field named in "Manage My Site", populated in "Manage Feeder Tables"; this is a fixed value and does not track change
Custom Detail Type START	initial value entered for custom employment field
Custom Detail Type END	most recent value entered for custom employment field
Staff who recorded effort	generated by user login
Date Recorded	date employment record was entered into software
Staff adding employment	generated by user login
Program	program where employment was added
General Phone Number	General phone number to call

Custom Employment
Custom employment fields in your site

Education Information	
Education Institution	select from feeder table
Education Start Date	date participant started at institution
Education End Date	date participant ended at institution
Education Dismissal Reason	select from feeder table
Completed	yes or no
General Placement Notes	partial-full text of notes
Education Program	choose from feeder table
Current Grade Level	enter number
Starting Grade Level	enter number
Starting Level	choose from feeder table
Current Level	choose from feeder table
Current Note	partial-full text of notes
Start Note	partial-full text of notes
Start Action Date	date when education was entered
Current Action Date	date when education was last updated

Staff who wrote Current Note	generated by user login
Staff who wrote Start Note	generated by user login

Reliable Contacts	
Reliable Contact	first name last name of contact
Contact Address	partial to full address
Contact Apartment	format
Reliable City	city generated by zip code
Reliable State	state generated by zip code
Reliable Zip	5 digit formatless/equal/not equal/greater/between (enter two zips)
Reliable Home Phone	11111111111 format
Reliable Work Phone	11111111111 format
Reliable Cell Phone	11111111111 format
Reliable Pager	11111111111 format
Reliable Email	partial or full
Is this an Emergency Contact?	emergency contact box yes/no
Reliable Attribute	feeder table populated by Site Admin.
Relationship	feeder table populated by Site Admin.

Family Members	
Family Name	name created by user to distinguish family, may be surname
Relationship	defined in feeder table
Head of Family	yes/no, one individual may be designated as head of family
Number of Members	the total number of members in each family

Referral Information	
Referral Status	as of date entered
Referral Status Date	Allows you to track when the status of a referral was changed.
Employer Entity Referrals	For Referrals made to Entities with type Employer

Service Provider Entity Referrals	choose from feeder table
Program Referrals Where the Referral is From	choose from feeder table
Program Referrals Where the Referral is To	choose from feeder table
Referral Dismissal Reason	choose from feeder table
Referral Date	greater/less than/equal/not equal/between date referral created
Pending Drop Off Date	greater/less than/equal/not equal/between date referral will end (set when added)
Release Client Information	yes or no (is it confidential, has release been signed?)
Was Referral Accepted	yes or no
Referral Notes	partial-full text of notes
Reason for Rejection	choose from feeder table
Reason for Referral	choose from feeder table
Site (Site Referrals Only)	choose from feeder table, only applicable for enterprise customers
Site Referral Program	choose from program within site
Referred By	Staff making the referral
Completed Referral	*Complete?* box checked on View Edit Referrals screen
Time Spent on Contact	In minutes

Processes Listed
All Participant Processes in your site; allows for searching within date requirements, and whether items within specific process were completed or not.

Participant Matches	
Title	This field is entered on the Entity Contact or Individual Entity on the Add New or View Edit Entity screens
Prefix	Mr., Mrs., Ms., etc.
First Name	Name of Participant
Middle Initial	Middle Initial of participant
Last Name	Last name of participant
Suffix	Jr., Sr., etc.
Contact Start Date	Date the match began
Contact End Date	Date the match ended

Termination Reason	match termination reason populated by the Reasons for Dismissal feeder table
Email	Participant's e-mail address
Address 1	Participants Address
Phone Number	Participant's phone number
Address 2	
Zip Code	Participant's Zip Code
State and City	Participants state and city
Notes	Notes associated with the match, entered on the Participant Match page
Length of Match	Number of days between start date of match and end date of match or between start date of match and today's date

Participant Room Information	
Occupancy Start	date participant began occupancy
Occupancy End	date participant ended occupancy
Unit	choose from feeder table
Room Program	program
Room	defines unit and specific room
Room Attribute	choose from feeder table
Length of Stay	greater/less/equal/not equal/between # of days
Current Room	room in which participant is currently staying
Reservation Date	date(s) for which room is reserved
Room Term Date for Active	

Participant Room History Information	
Occupancy Start	date participant began occupancy
Occupancy End	date participant ended occupancy
Unit	choose from feeder table
Room Program	program
Room	defines unit and specific room
Room Attribute	choose from feeder table
Length of Stay	greater/less/equal/not equal/between # of days
Current Room	room in which participant is currently staying
Reservation Date	date(s) for which room is reserved
Room Term Date for Active	

Criminal History	
Criminal Charge	choose from list in feeder table, hold control to choose more than 1 charge
Criminal Charge Type	choose from list of 4, hold control to choose more than 1 type
Criminal Result	customizable feeder table
Start Date	start date of criminal charge (date of arrest, incarceration)
Termination Date	end date of criminal charge (date of release)
Notes	text in case notes

Custom Demographics by Name	
Custom Demographic Name	enter full or partial name
Value of Demographic	enter full or partial value

Participant Eligibility for Program
Contains information on participant eligibility for different Programs of current Site.

Client Site	
Site Name	name of site, only applicable for enterprise customers
Site Pull Down	Select the name of a site or sites from a drop down box

System Information	
Days in Education	greater/less than/equal/not equal/between number of days
Number of Education Placements	greater/less than/equal/not equal/between number of days
Days in Employment	greater/less than/equal/not equal/between number of days
Number of Employment Placements	greater/less than/equal/not equal/between number of placements
Processes	choose from feeder table
Programs	choose from feeder table (includes disabled)
In House Site Referral	yes or no
Referral to Provider	choose from feeder table

Entity Focus Areas

Entity Information	
Entity Unique Identifier	exclusive number automatically assigned by ETO Software ®
Entity Name	format
Entity Type	choose from feeder table
Entity Sub Type	choose from feeder table
Entity Program Specific	choose from feeder table
Address 1	entity address
Address 2	address continued
Zip Code	5 digit formatless/equal/not equal/greater/between (enter two zips)
State and City	zip code populated
General Notes	partial-full text found in notes
Disabled	differentiates between disabled/enabled entities
City	populated by zip code
State	populated by zip code
General Phone Number	General phone number for the entity

Entity Attributes

All Custom Attributes in your site.

Entity Contact Information	
Contact Name	Name of contact
Title	job title of contact

51

2417 Reston St, Suite 300
The Reston Building 3rd Floor
Baltimore, MD 21224

Phone: 410 252 7600
To Free: 866 732 3680
Fax: 410 252 7601

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Prefix	choose from feeder table
Suffix	choose from feeder table
Email	partial-complete contact email
Contact Address 1	contact address
Contact Address 2	contact address
Contact Zip Code	5 digit; equal/not equal/greater/between (enter two zips)
Contact State and City	populated by zip code
Contact Notes	partial-complete text found in notes related to contact
Phone Number Type	choose from feeder table
Phone Number	1111111111 format
Extension	phone extension
Contact City	populated by zip code
Contact State	populated by zip code

Entity Assessments	
Contact Name	Entity contact name
Assessment Name	choose from feeder table with site-wide assessments
Assessment Questions	must first choose assessment, then feeder table will be populated with text of questions
Assessment Comment Question	prompt entered when solicit comment box is selected following assessment question
Comment Response	any comment response that is like
Assessment Choice Response	exclusive/non exclusive choice
Assessment Text Response	partial or entire
Assessment Numeric Response	
Assessment Date Response	date submitted as response
Assessment Yes No Response	Boolean response
Assessment Entity Cross Reference	list of entities in your site
Assessment Participant	list of participants in your site

52

2477 Boston St. Suite 360
The Foundry Building 3rd Floor
Baltimore, MD 21224

Phone 410 252 7660
Toll Free 866 732 3560
Fax 410 252 7561

Atlanta   Austin | Baltimore   Boston   New York   San Diego

www.socialsolutions.com

Cross Reference	
Staff completing Assessment	generated by user login
Date Assessment Taken	Date the assessment was taken

Entity Outcomes Active	
Total Time in minutes	time aggregated for all entity outcomes
Total Contacts	total number of contacts made
Outcome Name	name of outcome
Outcome by Name	search format
Starting Value	initial value entered
Starting String Value	initial value entered for string value outcome
Starting Boolean Value	initial value entered for yes/no value outcome
Starting Numeric Value	initial value entered for numeric value outcome
Ending Value	most recent value entered
Ending String Value	most recent value entered for string value outcome
Ending Boolean Value	most recent value entered for yes/no value outcome
Ending Numeric Value	most recent value entered for numeric value outcome
First Contact Date	date for which first contact was recorded
Last Date of Contact	most recent date for which contact was recorded

Entity Outcomes Details	
Outcome Name Detail	select Program Name and outcome(s) from list
Outcome by Name Details	search by full or partial outcome name
Composite Outcome	select Program Name and outcome(s) from list
Date of Contact	date for which contact was recorded
Time Spent on Contact	in minutes
Contact Location	choose from feeder table
Numeric Value	numeric value outcomes
Boolean Value	yes/no outcomes
String Value	string value outcomes
Notes	partial-full text from notes
Next Contact Date	date of next contact set

Times Stamp of Effort	time and date effort was recorded in software
Program	Program Name
Start Date	Date of enrollment
End Date	Date of dismissal

Program History	
Program	Program Name
Start Date	Date of enrollment
End Date	Date of dismissal

Active Program

Active Program	Program(s) in which currently enrolled
Program Start Date	Date(s) of enrollment

Last Contact Information	
Last Outcome	outcome most recently had effort recorded
Last Contact Date	date for which effort was recorded
Last Composite Name	composite outcome most recently had effort recorded
Last String Value	most recently recorded for string value outcome
Last Yes - No Value	most recently recorded value for Yes/No outcome
Last Numeric Value	most recently recorded value for Numeric outcome
Last Contact Location	most recently recorded contact location for any outcome
Last Outcome or Composite Names	most recently recorded effort
Last Time on Contact	most recently recorded minutes of contact
Last Next Contact Date	most recently recorded date of next contact
Last Notes	partial/entire text of notes from most recently recorded contact
Staff Name	generated by user login

No Zip Entity Information	
Entity Unique Identifier	exclusive number auto generated by the software
Entity Name	name assigned to entity (individuals last name, first name)
Entity Type	choose from feeder table
Entity Sub Type	choose from feeder table
Entity Program Specific	within specific program only
Address 1	entity address
Address 2	entity Apt./Suite
State and City	populated by zip code
General Notes	partial/entire text from entity general notes
Disabled	differentiates between disabled/active entities

General Focus Areas (this is a program specific focus area)

Program Information	
Program Unique Identification	exclusive number auto generated by the software
Program Name	name of program (assigned by program feeder table)
Program Type	choose from box
Program Manager	Name of program manager
Enabled/Disabled	Shows if program is enabled or disabled

General Outcomes	
Total Time in minutes	time spent combined for said outcome
Total Contacts	number of contacts made for said outcome
Outcome Name	choose from feeder table
Outcome by Name	search format
Starting Value	initial value entered
Starting String Value	initial value entered (string value outcomes only)
Starting Boolean Value	initial value entered (Boolean value outcomes only)
Starting Numeric Value	initial value entered (numeric value outcomes only)
Ending Value	most recent value entered
Ending String Value	most recent value entered (string value outcomes only)

Ending Boolean Value	most recent value entered (Boolean value outcomes only)
Ending Numeric Value	most recent value entered (numeric value outcomes only)
First Contact Date	date first contact was recorded for said outcome
Last Contact Date	most recent date contact was recorded for said outcome

General Outcomes Details	
Outcome Name Details	choose from feeder table (by program)
Outcome by Name Details	search format
Composite Name	name of composite outcome
Date of Contact	date for which outcome was recorded
Time Spent on Contact	in minutes
Contact Location	choose from feeder table
Numeric Value	outcome effort is recorded in numbers
Boolean Value	outcome effort is recorded as yes/no
String Value	choose outcome string value from feeder table
Notes	partial/full text of notes
Next Contact Date	date next contact was set when outcome effort was recorded
Staff	generated by user login
Time Stamp of Effort	date and time effort was recorded in software

Additional Program Details	
Number of Active Participants	enrolled participants per program (may be enrolled in +1)
Outcomes	may or may not be program specific
Funder	choose from feeder table
Funding Year	enter year
Funding Amount	less/equal/not equal/greater/between amount (s) entered

General Assessments	
Assessment Name	choose from feeder table with site wide assessments
Assessment Question	must first choose assessment, then feeder table will be populated with text of questions

56

2477 Boston St. Suite 300
The Funding Building 3rd Floor
Baltimore, MD 21224

Phone: 410.752.7560
To Free: 866.732.3560
Fax: 410.752.7561

Atlanta   Austin | Baltimore   Boston   New York   San Diego
www.socialsolutions.com

Assessment Comment Question	prompt entered when solicit comment box is selected following assessment question
Comment Response	any comment response that is like
Assessment Choice Response	exclusive or nonexclusive choices
Assessment Text Response	partial/full text from arbitrary text response
Assessment Numeric response	
Assessment Date Response	date entered as assessment response
Assessment Yes No Response	yes/no response
Assessment Entity Cross Reference	list of entities in your site
Assessment Participant Cross Reference	list of participants in your site
Staff completing Assessment	generated by user login
Date Assessment Taken	Date when the assessment was taken

⊕ Assessments Listed

All General Assessments in your site.

Staff Focus Areas

Staff Information	
Staff Unique Identifier	exclusive number automatically generated by ETO Software ®
Staff Name	first name last name format
Role	choose from feeder table (hold down the CTRL key to choose more than one)
Disabled	user account disabled or enabled

User Name	usually in first initial, last name format

Staff Login/Logout	
Staff Login Date	greater/less/equal/not equal/between login date(s)
Staff Logout Date	greater/less/equal/not equal/between logout date(s)
Staff Login Time	login time is like (military time) 00:00:00
Staff Logout Time	logout time is like (military time) 00:00:00

Staff Assessments	
Assessment Name	choose from feeder table
Assessment Question	must choose assessment first, then question
Assessment Comment Question	prompt for comment following question on assessment
Comment Response	response contains same text
Assessment Choice Response	exclusive or non-exclusive choices
Assessment Text Response	partial/full text from arbitrary text response
Assessment Date Response	date response
Assessment Yes/No Response	yes/no response
Assessment Entity Cross Reference	list of Entities in your site
Assessment Participant Cross Reference	list of Participants in your site
Staff completing Assessment	generated by user login

Family Focus Areas

Family Information	
Family Unique Identifier	exclusive number automatically assigned by the software

Family Name	surname or name assigned to family
Disabled	who have/have not been disabled in the software

Family Members	
Member Name	first name last name
Relationship	choose from feeder table, hold control to choose more than one
Head of Family	who is/is not designated as head

Assessments Listed

All Family Assessments in your site.