

QRG – Analytics Reporting Overview

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WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

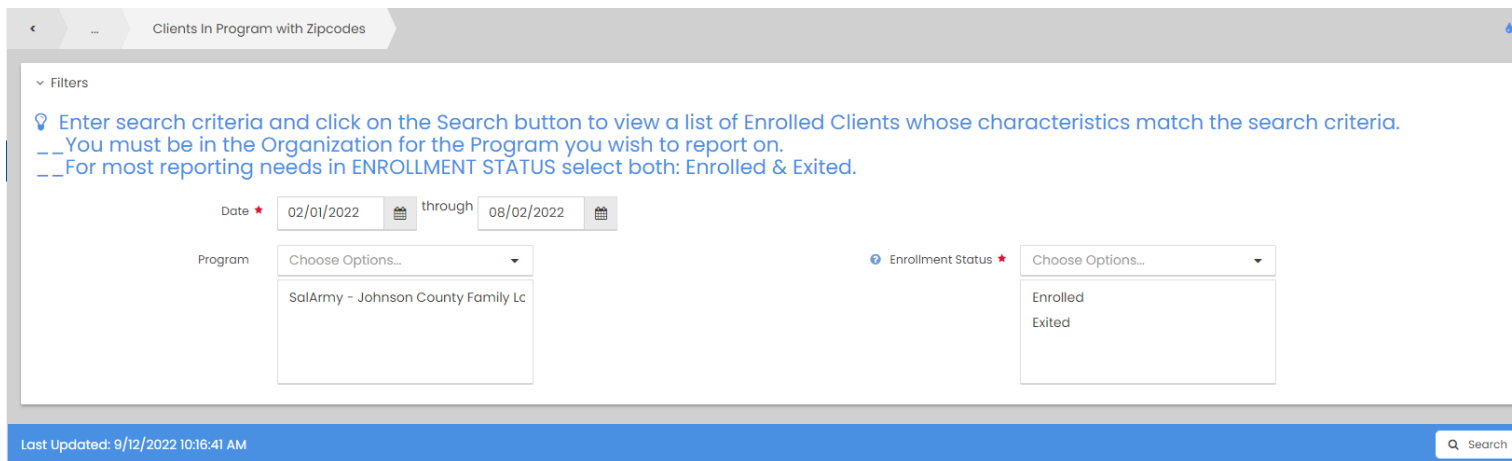
WHO THIS GUIDE IS FOR – This guide is for use by HMIS System Admins who want to utilize the CaseWorthy Analytics functionality. A special setting to allow you to fully change and save analytic views is required.

IMPORTANT: To use Report Analytics functionality you must have special permissions set. Please reach out to HMISHelpDesk@marc.org to request.

WHAT IS ANALYTIC REPORTING – CaseWorthy’s Analytics reporting functionality provides the ability to customize and then save report results for future reporting. Using pivot table options (ways to interact with the data) users can tailor the info to meet their needs and then save these custom views of the report. Several views can be saved with each report. Options to tailor reporting include being able to show or hide data field included with the results data set, filter, sort, summarize or expand data and subtotal or count results.

Let’s walk through an example of using an analytics report, so you have an idea of the look and feel of this type of reporting. For this example, the user has already been setup with appropriate CW settings for this functionality. We will look at an Analytics report titled *Clients In Programs w/ Zip - Analytics*.

1. Just like other CaseWorthy reporting options you select the information you wish to base the report on and click on the *Search* button.



2. When the results are generated on the screen you will notice a few different items along with the report results. The biggest difference you see is a ribbon with buttons that allow you to change, select and save views to fit your needs. We’ll get into more detail about how to use this functionality further on in the QRG.



- 3. Just to give you an idea of what Views look like, below are 2 examples of different views from the same report.

This first example shows total count of clients and families by zip code.

Last Updated: 9/12/2022 10:12:42 AM

Save Save As Views Grid Charts Format Options Collapse Expand Export

2. Family Count By ZipCode View

1	2	3	4	5
PROGRAM NAME	CLIENT ZIPCODE	Total Distinct Count of Client ID	Total Distinct Count of Enrollment.FamilyID	
SalArmy - Johnson County Family Lodge	00000	5	1	
	66061	6	2	
	66205	10	2	
	66207	4	1	
	66210	3	1	
	66211	2	1	
	66212	6	1	
	66214	2	1	
	66215	3	1	
	66216	3	1	
SalArmy - Johnson County Family Lodge Total		44	11	

This 2nd example is a view of the same data results showing a breakout by gender for each zip code.

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Save Save As Views Grid Charts Format Options Collapse Expand Export

4. ZipCode & Gender View

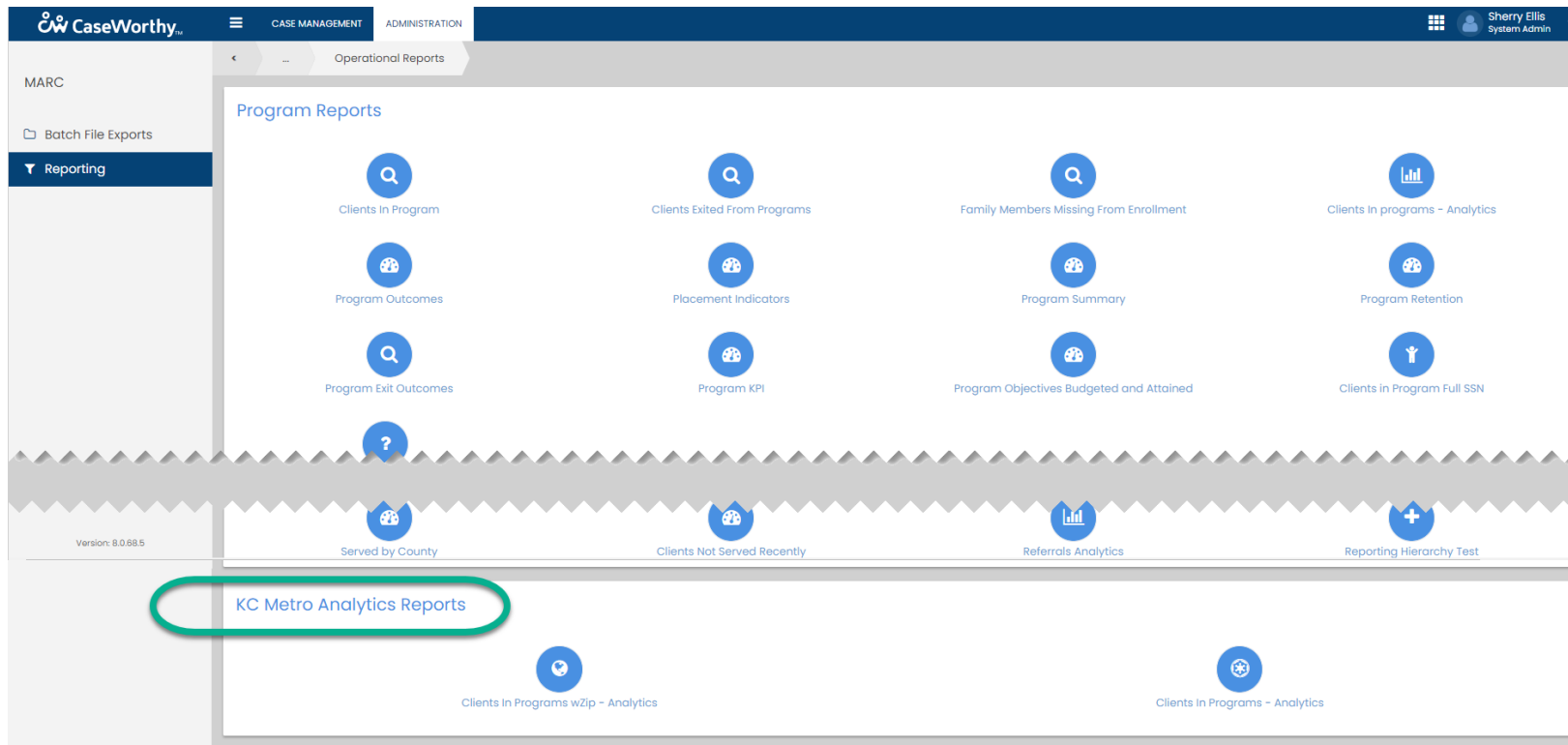
	1	2	3	4	5	6	7	
1	GENDER ⚙							
2	PROGRAM NAME	CLIENT ZIPCODE	Female	Male	Total Distinct Count of Client ID			
3	▼ SalArmy - Johnson County Family Lodge	00000		2	3		5	
4		66061		3	3		6	
5		66205		5	5		10	
6		66207		3	1		4	
7		66210		1	2		3	
8		66211		2	0		2	
9		66212		5	1		6	
10		66214		1	1		2	
11		66215		2	1		3	
12		66216		1	2		3	
13	SalArmy - Johnson County Family Lodge Total			25	19		44	
14								
15								

With Analytics Reports, once you customize the data the way you want it to look, you can save each different view and have them available every time you run the report.

HOW DO I KNOW IF IT IS AN ANALYTICS TYPE REPORT

All reports that have been set up as Analytic type reports will be included in the section titled **KC Metro Analytics Reports**. For the user role System Admin this can be found:

Administration : Reporting : Operational Reports : KC Metro Analytics Reports



ANALYTIC REPORTING BASICS

CaseWorthy’s Analytics Reporting is a highly customizable reporting tool. Because of its flexibility this guide will focus on providing you a core understanding of key components that make up the tool. The best way to learn Analytics Reporting is to use the tool.

- *REMINDER:* You must request permission to have Reporting Analytics functionality added to your CaseWorthy HMIS Userid.
- *REMINDER:* CaseWorthy Reports that contain analytics functionality must be setup as Analytic Reports. Any reports that contain the “Analytics” in its title has analytic reporting functionality included. These reports can be found:

Administration : Reporting : Operational Reports : KC Metro Analytics Reports

Create Report

Let’s start with generating the analytics report. For this example, we will use the *Clients In Programs w/ Zip - Analytics*. We’ll include the report parameters and click *Search*.


#	What	Description/Notes
1	Search	Use the Search button to initiate a report on the selected parameters. Also, it is recommended you use the Search button anytime to want the most current results (as it will refresh the results with the most current data.)
2	Date Data Last updated	This reflects the date and time that that data results were last updated.
3	Analytics results area	The results of the search will be reflected in this section. Additionally, customizing how your data looks is all done from this area.

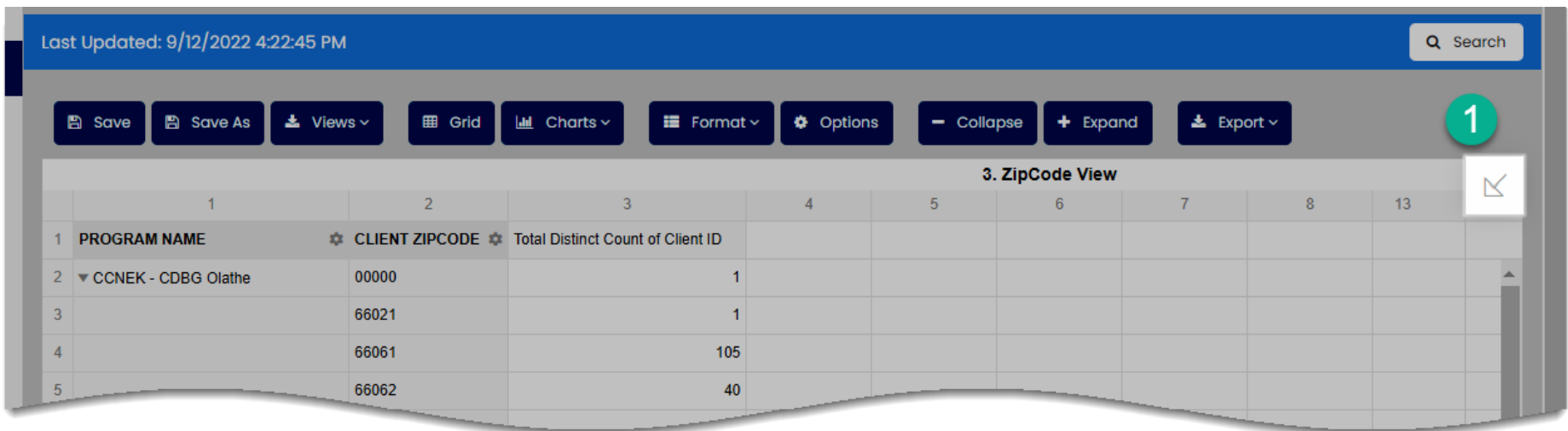
The screenshot displays the 'Clients In Program with Zipcodes - Analytics' interface. At the top, there are search filters including a date range from 07/15/2022 to 08/02/2022, a 'Program' dropdown menu with options like 'CCNEK - CDBG Olathe', and an 'Enrollment Status' dropdown menu with 'Enrolled' and 'Exited' options. A search button is located on the right. Below the filters, a blue bar indicates 'Last Updated: 9/12/2022 3:42:41 PM'. A toolbar contains various options like 'Save', 'Views', 'Grid', 'Charts', 'Format', 'Options', 'Collapse', 'Expand', and 'Export'. The main data area is titled '3. ZipCode View' and contains a table with the following data:

1	2	3	4	5	6	7	8	9	10	11	12	13
PROGRAM NAME	CLIENT ZIPCODE	Total Distinct Count of Client ID										
CCNEK - CDBG Olathe	00000	1										
	66021	1										
	66061	105										
	66062	40										
	66083	1										
		2										

Accessing Field and Layout Options

Next, we'll begin using the analytics functionality.

#	What	Description/Notes
1	Fields and layout button	Click on the Tools button  (diagonal downward arrow) to access fields and layout options.



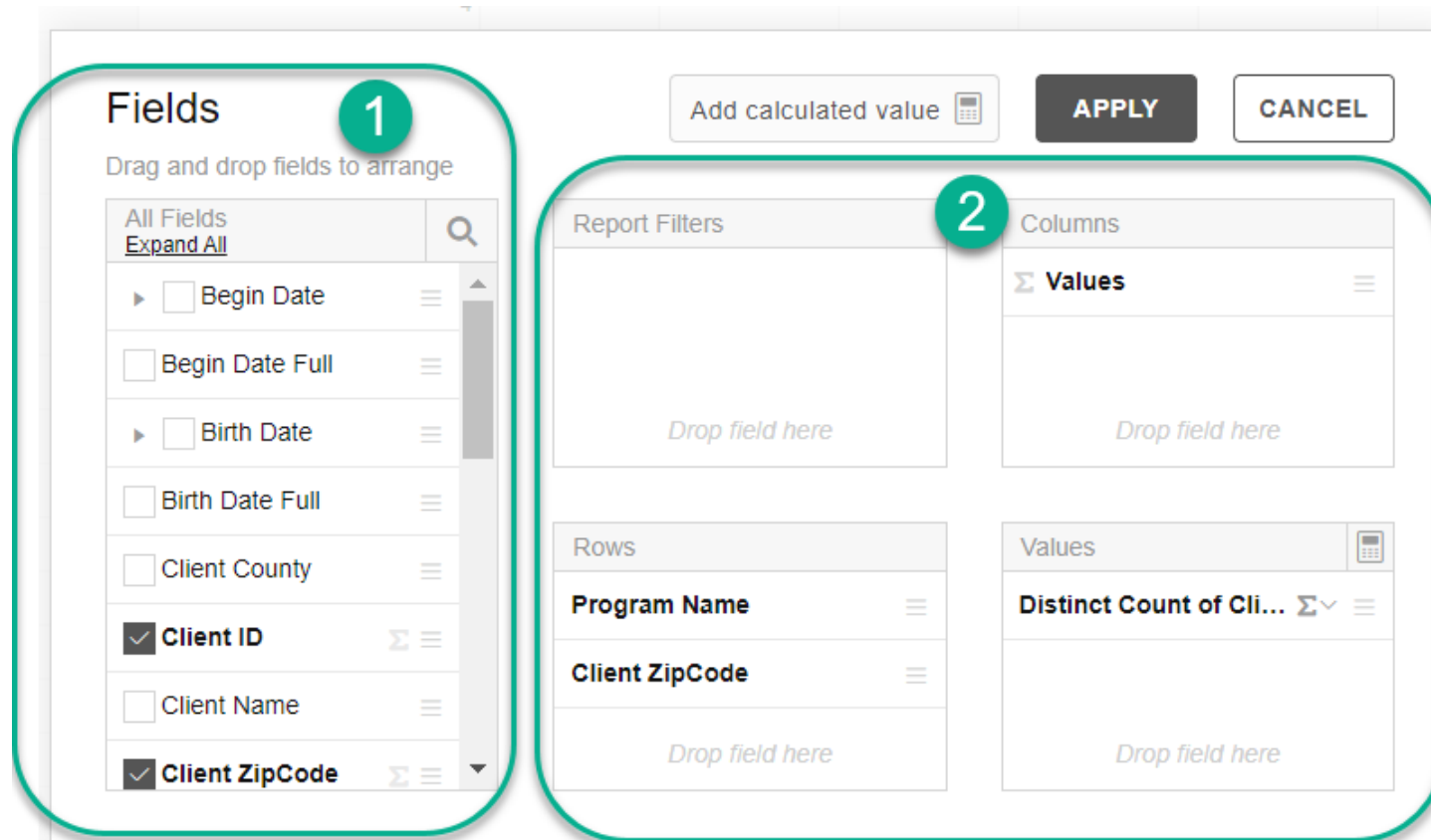
The screenshot shows the HMIS Analytics Reporting interface. At the top, it displays 'Last Updated: 9/12/2022 4:22:45 PM' and a search bar. Below this is a toolbar with buttons for 'Save', 'Save As', 'Views', 'Grid', 'Charts', 'Format', 'Options', 'Collapse', 'Expand', and 'Export'. A red circle with the number '1' highlights the 'Options' button. Below the toolbar is a table titled '3. ZipCode View'. The table has columns for 'PROGRAM NAME', 'CLIENT ZIPCODE', and 'Total Distinct Count of Client ID'. The data rows are as follows:

1	PROGRAM NAME	CLIENT ZIPCODE	Total Distinct Count of Client ID
2	CCNEK - CDBG Olathe	00000	1
3		66021	1
4		66061	105
5		66062	40

A red circle with the number '1' highlights the 'Options' button in the toolbar, and a white box with a diagonal downward arrow icon is positioned over the 'Options' button in the table header area.

Field and Layout Option Overview

#	What	Description/Notes
1	Fields	All the fields available for use with this analytics report can be found here. Just drag and drop fields into the layout window options to include in the results.
2	Layout	These options allow you to select which fields to show on the results grid, in what order and with what filters and values.



Options on the Ribbon

#	What	Description/Notes
1	Save, Save As, View	These buttons allow you to keep format settings (view) of the data. Once you name and save a view you can toggle between the different formats from the View button.
2	Grid, Charts	Data can also be shown in various chart options (Bar, Line, Scatter, Pie). The Grid button returns you from a chart view to the grid view.
3	Format	Provides cell formatting and conditional formatting settings.
4	Options	Provides layout options including displaying grand totals and subtotals. The Layout option contains 3 options: Compact, Classic and Flat. These are just various ways to show data in the grid. Compact expands data down the grid, where Classic expands data across the grid (to the right).
5	Collapse, Expand	Drilldown, telescope or roll-up data in the grid.
6	Export	Options to export include HTML, CSV, Excel, Image, PDF, Raw Data. Some of these export options are influenced by how you set up things in the grid.



NEXT STEPS TO LEARNING MORE

- Watch this brief video from Caseworthy. (3.21 min) <https://youtu.be/Favng4nms74>
- KC Metro HMIS Administrative team is working on a training class which they will video. *(expected fall 2022)*
- Go out to the Analytic reports currently available and give it a try.
- Reach out KC Metro HMIS Administrative team if you need any assistance. HMISHelpDesk@marc.org