ETO Results Basic Overview Training: Reminders Sheet

Accessing ETO Results

To build a new report, click “ETO Results” from the Reports section of the right-hand navigation bar in ETO.

To open existing reports, use View Reports, or View Reports (New).

Modifying a Standard Report

1. Open the existing report using View Reports or View Reports (New) inside of the Reports menu.
2. Click Cancel on any Prompts that appear.
3. Under the Document menu, click Save as.
4. Choose “Favorites Folder” under “My Folders” as the location, and give the report a new name.
5. Click on your newly named report inside of View Reports.
6. As the report opens, cancel any prompts again, and click the Edit button that appears.

Help Resources and Training

Free 3.5 hour ETO Results Orientation (and info on additional paid trainings)
From inside of ETO Software, click on Help>Help Manual, then select “ETO Results Trainings” under the “Trainings” menu on the right of the page, or visit https://sites.google.com/site/etosoftwarehelpmanual/admintrainings/eto-results-trainings

Social Solutions’ ETO Results Documentation
From inside of ETO Software, click on Help>Help Manual then click “ETO Results” under the “Popular Topics” menu on the right of the home page, or visit https://sites.google.com/site/etosoftwarehelpmanual/reports/view-reports

Built in Help inside of SAP BusinessObjects (aka ETO Results):
Click on the blue “?”, then “Web Intelligence Help”. Click on the index or search icon to access details

Which Universe Should I Use?

Etoclient 324 Participant Universe - All Participant focused TouchPoints, Collections, Demographics, and Program Enrollment for participants. TouchPoint, Collection, and Demographic data are returned as flattened data.

Etoclient 324 TouchPoints Universe - All Touchpoint data as flattened data, including entity responses and participant responses.

Standard Programs Universe - Program details, including what is needed to match Completing Program Unique Identifier from TouchPoints and Collections to actual program names.

Standard Entity Universe - Entity name, unique ID, subject IDs, entity attributes.

Standard TouchPoints Universe (New) - All Touchpoints (including entity focused responses), as unflattened data.

Standard Collections Universe - All collections data as unflattened data.

Tips for New Reports:
-Always include an identifier for the subject of a query (entity, participant, program) AND the response (Response ID, Program Enrollment Unique Identifier, etc.)
-Choose the “Refresh on open” option to ensure that users see prompts (Right-Click in the Report window and select Document Properties for this option) and only see data that they have access to.
-Disable “Auto-Merge Dimensions” (Right-Click in the Report window and select Document Properties for this option).
Where to Find Commonly Used Data Fields in Etoclient 324 Participant Universe:

After choosing a universe, you will be taken to an interface where you can select data objects to pull into the report that you are going to run. On the left side of the screen, there will be a tab called “Data” with an extensive collection of folders that contain all of the various data elements which can be included in ETO Results report using this universe. The folders in the Etoclient 324 Participant Universe containing the most commonly used data objects are circled and described below.

Basic participant information like Participant Name, Subject Unique Identifier, Site Name (i.e. your agency/organization)

Program enrollment information such as Program Name, Program Start Date, Program End Date, Dismissal Reason, and whether participant is currently active

Demographics data for participants (e.g. gender, grade level, race, ethnicity, date of birth (DOB), address)

Any data coming from ETO TouchPoints (e.g. Program Attendance, Caregiver Information, Public Benefits Profile, SAYO)

Information about OST Groups, PCAPS Activity Groups or ASAP Clubs

To include a data object in the report query, either double-click on the name of the object or click and drag it into the “Result Objects” area. To apply a filter to the query, drag the object by which you want to filter into the “Query Filters” area and choose logic for the filter. Select “Run Query” in the upper right side of the interface to run the query and be taken to the report. To return to the query interface, click on “Edit Query” in the upper left.