Data Explorer Training
2016 Syllabus

Part 1: Course Information

Instructor Information

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Course Description

This course presents ClientTrack's Data Explorer reporting tool. Learn how to design queries and customize reports that removes the need for computer programming skills. You will be able to generate information that suits your needs and fits your schedule. Use it to meet reporting requirements or to just explore your data, either way Data Explorer will allow you to discover new ways of using your data for planning and decision making. This training is geared toward those who use HMIS regularly and have a need to extract data not readily available in stock reports.

Topics Include:
Domains
Linking Domains
Generating & Storing Reports
Data Visualizations Basics
Column Sort & Sum
Filtering and Parameter Building Basics

Prerequisite
- Basic computer skills
- Current HMIS User

Recommended Texts & Other Readings (Not required)
- https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf
- https://www.hudexchange.info/resources/documents/GlossaryofHMISDefinitionsandAcronyms.pdf

Course Structure

This course will be delivered by the City of Spokane's HMIS Coordinator and/or HMIS Specialist. You will use your ClientTrack account to access the HMIS training and production environments.

- https://www.clienttrack.net/spokanehmis_training
- https://www.clienttrack.net/spokanehmis

Part 2: Course Goal

The goal of this course is to introduce you to Data Explorer and prepare you for building customized reports in ClientTrack by learning how data domains work and relate. You will be able to add your own filters and develop parameters for your unique query needs, and learn techniques to function farm existing reports. Generating these unique report will allow you to explore your data beyond the basics of what's available to standard users and open up new ways of understanding and visualizing your data.

Objective 1: You Can Locate Data Explorer in ClientTrack

Task 1.1: Open ClientTrack and navigate to the Home Workspace
Task 1.2: Go to Reports and click on Data Explorer

Objective 2: You Can Create a New Report or Copy & Edit an Existing Report

Task 2.1: Learn about the features on the Open Saved Question form
Task 2.2: Select New Question and enter into Data Explorer
Task 2.3: Locate an existing report and select Copy

Objective 3: You Can Identify & Link Domains

Task 3.1: Discuss data terms and definition (columns, tables, fields, values)
Task 3.2: Click on domain and view columns
Task 3.3: Go to workflow and identify fields that populate the domains
Task 3.4: Select domain relationships or link: Client, Enrollment, Assessment & Service
Task 3.5: Add and remove domains

Objective 4: You Can Generate Data Explorer Report & Add Filters

Task 4.1: Locate & learn about Data Explorer menu bar
Task 4.2: Add report filters, and/ or sort
Task 4.3: Click Show Me to generate report
Task 4.4: Arrange report and export

Objective 5: You Can Generate Data Visualizations

Task 5.1: Click on Visualize
Task 5.2: Adding an X & Y axis + Time
Task 5.3: Apply Excel Graphs