Always click “enter data as” then “youth enrichment classes” when logging on to the system

ACTIVITES WORKFLOW

1. Create new activity/class/meeting
    a. Click Activities on left side of screen
        i. Search for existing activities
    b. Click add new activity
    c. Fill out activity info
        i. Local vs public activity type
            1. Local- only visible/enrollable to your organization
            2. Public- visible to all organizations
        ii. Ages able to enroll
            1. 0-99 for any age group
        iii. Enrollment type
            1. Open enrollment- anyone from any agency can enroll clients in your class
            2. Conditional- anyone from any agency can request enrollment in you class; you approve each for enrollment
            3. Non-enrollment- no enrollment required for the class
        iv. Enrollment moderator
            1. Who approves enrollment
        v. Category
            1. Echo can update this list
        vi. Assign service
            1. Yes- Tag each class with a service code for various purposes
            2. No- do service tag attached to activity/class enrollment
        vii. Set Volunteer requirements
            1. optional
        viii. Click save or save & exit
2. Set up sessions
    a. Search for/find your activity
    b. Click the sessions tab along the top of the page
    c. Create sessions
        i. Generate sessions
            1. Use for basic session set up based on recurrence & other criteria specified at activity setup
        ii. Add session/add from calendar

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a. Use to set up individual sessions in addition to the generate sessions button

3. Enroll Clients
    a. Create new client file(s) or make sure file exists
        i. See new client workflow in existing training material
    b. From activity enrollments tab
        i. Click add new participant
            1. Search for existing clients to enroll
            2. Click check box for enroll
            3. Click submit
                a. Warning may pop up if client does not match criteria
            4. Select enrollment date
                a. Usually day data entry is occurring [today]
    c. From client’s file
        i. Click activities tab
        ii. Click enroll in activity
        iii. Search for the class
        iv. Click plus sign next to class
            1. Warning will pop up if class requires moderator approval
4. Track Attendance
    a. Click the attendance tab from the activity section
    b. Choose the session attendance is being tracked
    c. Mark all as attended
        i. Can update any that were not in attendance
        ii. OR mark each participant as attended or not individually
        iii. Click save
5. Print enrollment list
    a. Signing sheet
6. Add to waitlist
    a. From enrollments in activities
        i. Click add new participant under waitlist heading
    b. Moderator can move from waitlist to enrolled
        i. Click the green plus to the left of waitlisted people to enroll them
7. Drop from course
    a. From enrollments in activities
        i. Click red minus button to drop client from course

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VOLUNTEER TRACKING Workflow

1. Add Volunteers to system (they won’t be able to access but so you can track their hours & volunteer history with you)
    a. Click “Activities” button on left of screen
    b. Click the Volunteer tab near the top right of the page
    c. Click “add new volunteer”
    d. Fill out the form with volunteer information (as much or as little as you need)
        i. Volunteer Type - Select Individual
            1. By selecting a group, you are only tracking that group’s total hours, not the hours of each individual
        ii. If you need the volunteer program drop down to change, email ECHO
    e. Click “save & exit” when done
2. Add Volunteers to a class/activity
    a. Click “activities” button on left of page
    b. Search for the class/activity you want to add volunteer to
    c. Click the “volunteers” tab on the top right of the page
    d. Click “add volunteers”
    e. Search for volunteers by program or any other criteria
    f. Click the plus sign next to the name(s) of volunteers you’d like to add
    g. Click the check box to the right of each name to add them to every session that’s been created
3. Track volunteer hours
    a. Find the activity you’d like to work on
    b. Click the “volunteer” tab near the top right of the page
    c. Click the “search button next to the session
        i. Find the session you’d like to add hours to
    d. Change the hours worked for each volunteer to reflect the hours they gave
        i. If a volunteer didn’t work that day
            1. Leave their hours at 0; or
            2. Click the trash can next to their name
                a. This only deletes them from this session/date, not the other dates they may have been added to
    e. Click save
    f. You can print time sheets after for volunteers to affirm their participation
    g. You’ll repeat all these steps for each session/date that you have class.

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ACTIVITY REPORTING

1. Attendance
    a. Click “reports” on the left hand side of the page
    b. Click “report writer’ near the bottom of the page
    c. Check the box next to “Activity Attendance”
        i. 5th box down on the left in the “tables” section” under “data category” section
    d. Click the “fields” tab at the top of the window
        i. Check at least the following to get your attendance report; you can add more to get more information if it’s useful
            1. Activity Enrollment ID
                a. This ID is specific for each person enrolled in the class
            2. Activity ID
                a. This ID relates to each class
            3. Attendance Status
                a. This is the count of attended, excused, unexcused
            4. Date Added
                a. This should be the date of the session
            5. Provider
                a. This refers to the agency providing the class/activity
            6. Select any other options that you might want
    e. Click the “filters” Tab
        i. You can add 1 or more filters at the same time to drill down into the information
        ii. Filter by activities/classes offered by your program
            1. Click “add filter”
            2. Select the “field/question” drop down
                a. Select “provider creating”
            3. Click the “my provider” button to select your program
                a. This will filter to only your program; otherwise it will select all activities in the system
        iii. Filter by individual activities/classes
            1. If you’d like to separate your classes to track attendance
            2. Click “add filter”
            3. Select “field/question” drop down
                a. Click “activity ID”
            4. Enter the Activity ID of the class you’d like attendance for

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a. The activity ID is on the activity search page or main page
    i. Search page
        1. To the right of the activity/class listing
    ii. On the Activity information page
        1. The top line on the activity info tab

iv. Filter by individual student(s)
    1. If you’d like to filter and see a specific student, add multiple filters to add multiple, but not all, students
    2. Click “add filter”
    3. Select the “field/question” drop down
        a. Click “activity enrollment ID”
    4. Enter the Activity Enrollment ID of the student you’d like to track
        a. This is the client ID number that can be found on the client profile or on the activity enrollment page
v. Filter by date range
    1. If you’d like to specify classes that occurred during a specific date range
    2. Click “add filter”
    3. Select the “field/question” drop down
        a. Click “date added”
    4. Select the “filter” drop down”
        a. Select “is between and including”
        b. Enter the date ranges you want to target
vi. You can filter any other information but these are the main ones to pull a general report

f. Count report
    i. Click the “counting” tab
    ii. The counts will populate based on the filter criteria
    iii. If something doesn’t look right, check the filter criteria
g. Preview/download Report
    i. Click the “preview” tab
    ii. View the report preview
        1. If theres any missing information
            a. Check more boxes as needed on the “tables” tab
            b. Check your filters
    iii. To download

Always click “enter data as” then “youth enrichment classes” when logging on to the system

            1. Click “download full report”
            2. This will download a zip file containing an excel file with the same information that’s in the preview
    h. Save the report for future reference
        i. This will save you tons of time after you’ve created your first set of reports!
        ii. Click the “options” Tab
        iii. Name your report
        iv. Provide a description including date the report was run
        v. Change any of your sorting criteria and ordering as needed
        vi. Click save report and exit
2. Volunteer Hours
    a. Click “reports” on the left hand side of the page
    b. Click “report writer’ near the bottom of the page
    c. Check the box next to “Activity Volunteer History”
        i. 11th box down on the left in the “tables” section” under “data category” section
    d. Click the “fields” tab at the top of the window
        i. Check at least the following to get your attendance report; you can add more to get more information if it’s useful
            1. Activity ID
                a. This ID relates to each class
            2. Date Added
                a. This should be the date of the session
            3. Provider
                a. This refers to the agency providing the class/activity
            4. Total Hours Worked
            5. Volunteer ID
                a. Specific for each volunteer
            6. Select any other options that you might want
    e. Click the “filters” Tab
        i. You can add 1 or more filters at the same time to drill down into the information
        ii. Filter by activities/classes offered by your program
            1. Click “add filter”
            2. Select the “field/question” drop down
                a. Select “provider creating”
            3. Click the “my provider” button to select your program

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a. This will filter to only your program; otherwise it will select all activities in the system

iii. Filter by individual activities/classes
    1. If you’d like to separate your classes to track attendance
    2. Click “add filter”
    3. Select “field/question” drop down
        a. Click “activity ID”
    4. Enter the Activity ID of the class you’d like attendance for
        a. The activity ID is on the activity search page or main page
            i. Search page
                1. To the right of the activity/class listing
            ii. On the Activity information page
                1. The top line on the activity info tab

iv. Filter by individual Volunteers
    1. If you’d like to filter and see a specific student, add multiple filters to add multiple, but not all, students
    2. Click “add filter”
    3. Select the “field/question” drop down
        a. Click “Volunteer ID”
    4. Enter the Volunteer ID of the student you’d like to track
        a. This is the Volunteer ID number that can be found on the Volunteer profile or on the activity Volunteer page

v. Filter by date range
    1. If you’d like to specify classes that occurred during a specific date range
    2. Click “add filter”
    3. Select the “field/question” drop down
        a. Click “date added”
    4. Select the “filter” drop down”
        a. Select “is between and including”
        b. Enter the date ranges you want to target

vi. You can filter any other information but these are the main ones to pull a general report

f. Count report
    i. Click the “counting” tab
    ii. The counts will populate based on the filter criteria
    iii. If something doesn’t look right, check the filter criteria

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g. Preview/download Report
    i. Click the “preview” tab
    ii. View the report preview
        1. If theres any missing information
            a. Check more boxes as needed on the “tables” tab
            b. Check your filters
    iii. To download
        1. Click “download full report”
        2. This will download a zip file containing an excel file with the same information that’s in the preview
h. Save the report for future reference
    i. This will save you tons of time after you’ve created your first set of reports!
    ii. Click the “options” Tab
    iii. Name your report
    iv. Provide a description including date the report was run
    v. Change any of your sorting criteria and ordering as needed
    vi. Click save report and exit

3. **You can now click the magnifying glass next to the save report**
    a. **Edit this report as you need to get the desired information**
    b. **Save the report again with a new name & description and another report will be save with any changes you made**
4. **To get a current report, open the saved report and the report should include current information as of that moment.**

If you have any trouble pulling reports, please contact ECHO and we’ll be happy to assist you in building reports