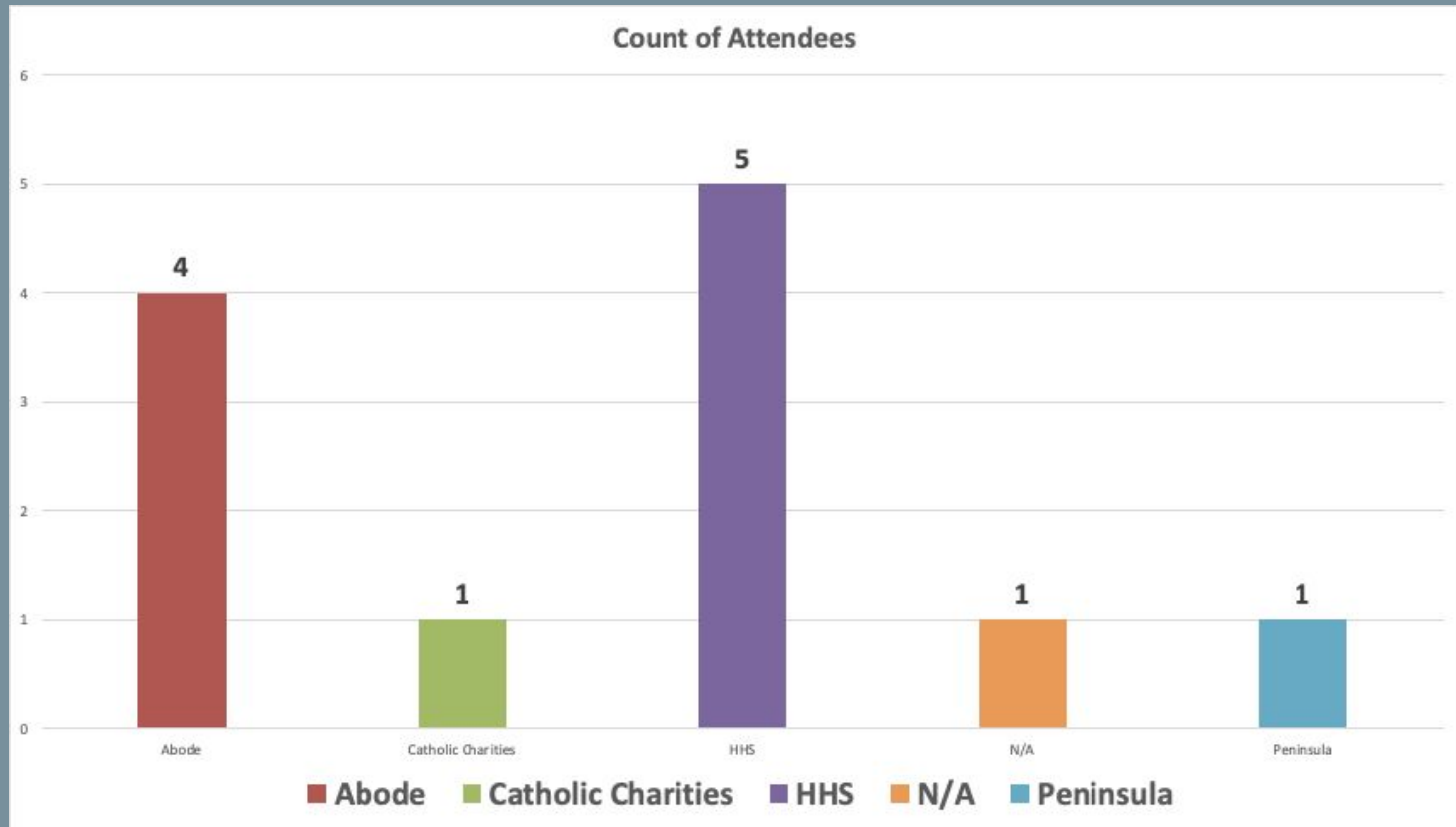


DATA LITERACY INSTITUTE WORKSHOP



Monday, May 13th, 2019

JUST BECAUSE WE CAN...



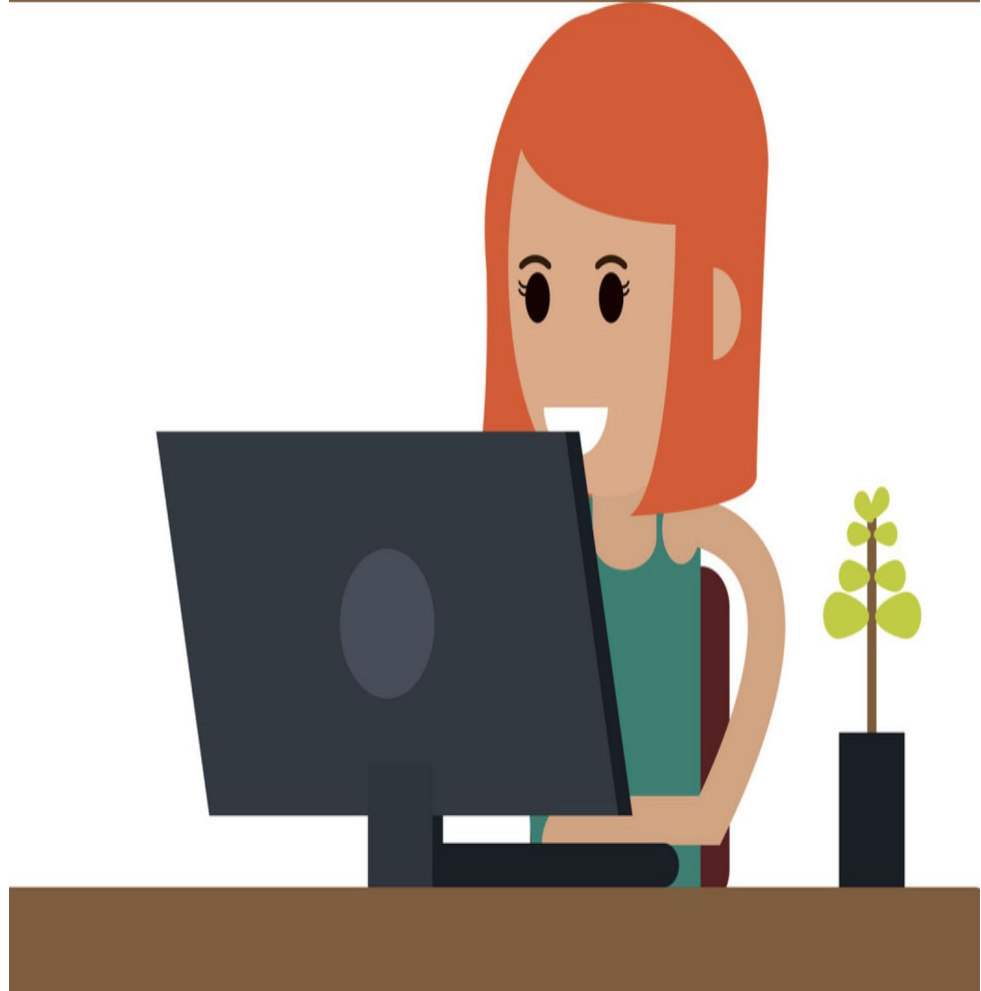
AGENDA

Pulling Reports

Using Excel to create Charts

Using PivotTables

Creating PivotCharts

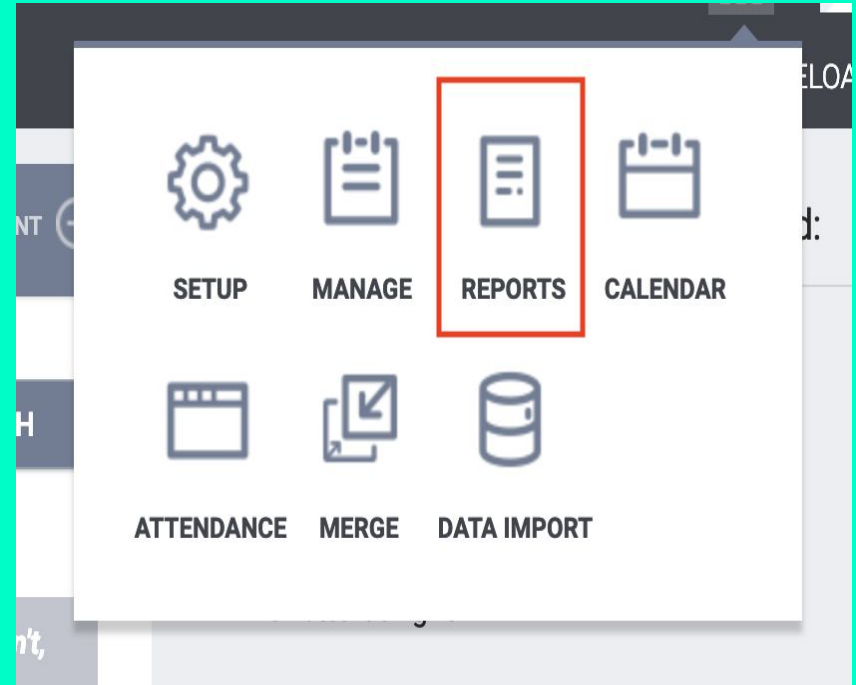


PULLING REPORTS

USING HMIS DATA

USEFUL TIP

Using canned reports to showcase your data

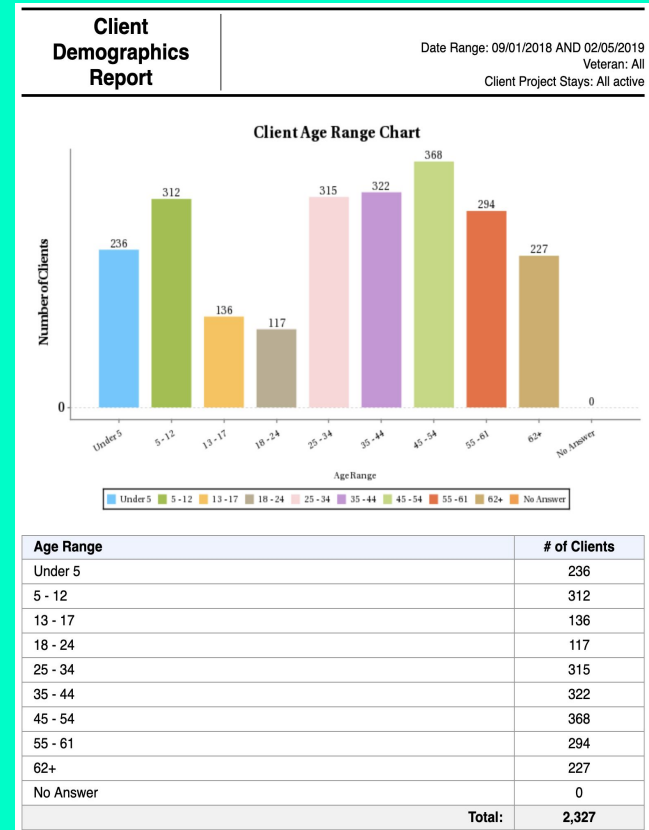


USING HMIS DATA

[OUTS-102] Performance Monitoring V3 Report	In Development	RUN	SCHEDULE
[OUTS-106] Client Demographics		RUN	SCHEDULE MORE INFO
[OUTS-205] Program Recidivism		RUN	SCHEDULE
[OUTS-720] Client Program Service		RUN	SCHEDULE

USEFUL TIP

Some canned reports will give you ready made graphs displaying your data.



USING HMIS DATA

USEFUL TIP

When running a report convert it to an EXCEL file so that you can manipulate the data

Web based report

Referral Statistics		Dates Between:	02/01/2018 and 02/01/2019
		Referral Direction:	inbound
Number of Agency referrals received	334		
Pending Referrals			
Number of pending referrals	26		
Oldest pending referral in days	273		
Newest pending referral in days	21		
Average pending referral in days	104		
Pending - In Process Referrals			
Number of pending referrals	8		
Oldest pending referral in days	721		
Newest pending referral in days	50		
Average pending referral in days	312		
Completed Referrals			
Number of referrals resulting in Program enrollment	129		
Longest time to connect referral in days	182		
Shortest time to connect referral in days	1		
Average time to connect referral in days	49		
Denied Referrals			
Number of denied referrals	170		
Longest time to deny a referral in days	257		
Shortest time to deny a referral in days	0		
Average time to deny a referral in days	61		
Breakdown Of Most Common Denied Referral Reasons			
Lack of Eligibility (Specify in Denied Message)	35		
Client out of County	1		
Client did not show up or call	45		
Client refused services	4		
Referral time expired	10		
Client Housed - self-resolved	22		
Other	35		
Client could not be located	11		
Client currently incarcerated	4		
Client Housed - through another program	2		
Client currently in another program	1		

Referral Statistics		Dates Between:	02/01/2017 and 02/01/2018
		Referral Direction:	inbound
Number of Agency referrals received	278		
Pending Referrals			
Number of pending referrals	0		
Oldest pending referral in days	0		
Newest pending referral in days	0		
Average pending referral in days	0		
Pending - In Process Referrals			
Number of pending referrals	0		
Oldest pending referral in days	0		
Newest pending referral in days	0		
Average pending referral in days	0		
Completed Referrals			
Number of referrals resulting in Program enrollment	90		
Longest time to connect referral in days	573		
Shortest time to connect referral in days	25		
Average time to connect referral in days	285		
Denied Referrals			
Number of denied referrals	188		
Longest time to deny a referral in days	597		
Shortest time to deny a referral in days	0		
Average time to deny a referral in days	240		
Breakdown Of Most Common Denied Referral Reasons			
Lack of Eligibility (Specify in Denied Message)	37		
Client out of County	1		
Needs could not be met by program	1		
Client did not show up or call	61		
Client refused services	5		
Referral time expired	6		
Client Housed - self-resolved	19		
Other	39		
Client could not be located	16		
Client currently incarcerated	3		

Excel report

OUR FRIEND, EXCEL



OUR FRIEND, EXCEL

If you pulled a report as an excel file double click on the report-this will open up the file in Excel.

USEFUL TIP

Within the worksheet make a duplicate file-one that you can “play” with this way you can preserve the original.

OUR FRIEND, EXCEL

Referral Statistics		Dates Between: 02/01/2017 and 02/01/2018	
Referral Direction:		inbound	
Number of Agency referrals received			278
Pending Referrals			
Number of pending referrals			0
Oldest pending referral in days			0
Newest pending referral in days			0
Average pending referral in days			0
Pending - In Process Referrals			
Number of pending referrals		2018-2019	2017-2018
Oldest pending referral in days	Number of Agency referrals received	334	278
Pending Referrals			
Newest pending referral in days	Number of pending referrals	26	0
Average pending referral in days	Oldest pending referral in days	273	0
Completed Referrals			
Number of referrals resulting in Program enrollment	Newest pending referral in days	21	0
Longest time to connect referral in days	Average pending referral in days	104	0
Pending - In Process Referrals			
Shortest time to connect referral in days	Number of pending referrals	8	0
Average time to connect referral in days	Oldest pending referral in days	721	0
Denied Referrals			
Number of denied referrals	Newest pending referral in days	50	0
Longest time to deny a referral in days	Average pending referral in days	312	0
Completed Referrals			
Shortest time to deny a referral in days	Number of referrals resulting in Program enrollment	129	90
Average time to deny a referral in days	Longest time to connect referral in days	182	573
Breakdown Of Most Common Denied Referral Reasons			
Lack of Eligibility (Specify in Denied Message)	Shortest time to connect referral in days	1	25
Client out of County	Average time to connect referral in days	49	285
Needs could not be met by program	Denied Referrals		
Client did not show up or call	Number of denied referrals	170	188
Client refused services	Longest time to deny a referral in days	257	597
Referral time expired	Shortest time to deny a referral in days	0	0
Client Housed - self-resolved	Average time to deny a referral in days	61	240
Other	Breakdown Of Most Common Denied Referral Reasons		
Client could not be located	Lack of Eligibility (Specify in Denied Message)	35	37
Client currently incarcerated	Client out of County	1	1
	Client did not show up or call	45	61
	Client refused services	4	5
	Referral time expired	10	6
	Client Housed - self-resolved	22	19
	Other	35	39
	Client could not be located	11	16
	Client currently incarcerated	4	3
	Client Housed - through another program	2	0
	Client currently in another program	1	0

Original report & Second report with additional fields added in another column

If you want to compare the same data across time, you can do this in Excel.

HOW?

Run the reports of the data you want to compare. Remember to export to Excel.

Choose which file you want to work with and copy the data values to the working excel file.

OUR FRIEND, EXCEL

REFERRALS	Year 18-19	Year 17-18
Number of Agency referrals received	278	334
Number of pending referrals	0	26
Oldest pending referral in days	0	273
Newest pending referral in days	0	21
Average pending referral in days	0	104
Number of pending referrals	0	8
Oldest pending referral in days	0	
Newest pending referral in days	0	
Average pending referral in days	0	
Number of referrals resulting in Program enrollment	90	
Longest time to connect referral in days	573	
Shortest time to connect referral in days	25	1
Average time to connect referral in days	285	49
Number of denied referrals	188	170
Longest time to deny a referral in days	597	257
Shortest time to deny a referral in days	0	0
Average time to deny a referral in days	240	61
Lack of Eligibility (Specify in Denied Message)	37	35
Client out of County	1	1
Needs could not be met by program	1	0
Client did not show up or call	61	45
Client refused services	5	4
Referral time expired	6	10
Client Housed - self-resolved	19	22
Other	39	35
Client could not be located	16	11
Client currently incarcerated	3	4
Client Housed thourhg another program	2	0
Client currently in another program	1	0

Cleaned and combined data

The screenshot shows the Microsoft Excel interface with a data table and a chart. The data table is identical to the one in the first image. The chart is a clustered bar chart comparing data for Year 17-18 and Year 18-19. The chart title is 'Chart Title'. The x-axis is labeled 'Year 17-18' and the y-axis ranges from 0 to 800. The chart shows two series: 'Client Housed through another program' and 'Other'. The 'Client Housed through another program' series has values of approximately 100 for Year 17-18 and 200 for Year 18-19. The 'Other' series has values of approximately 300 for Year 17-18 and 400 for Year 18-19. The chart is a clustered bar chart.

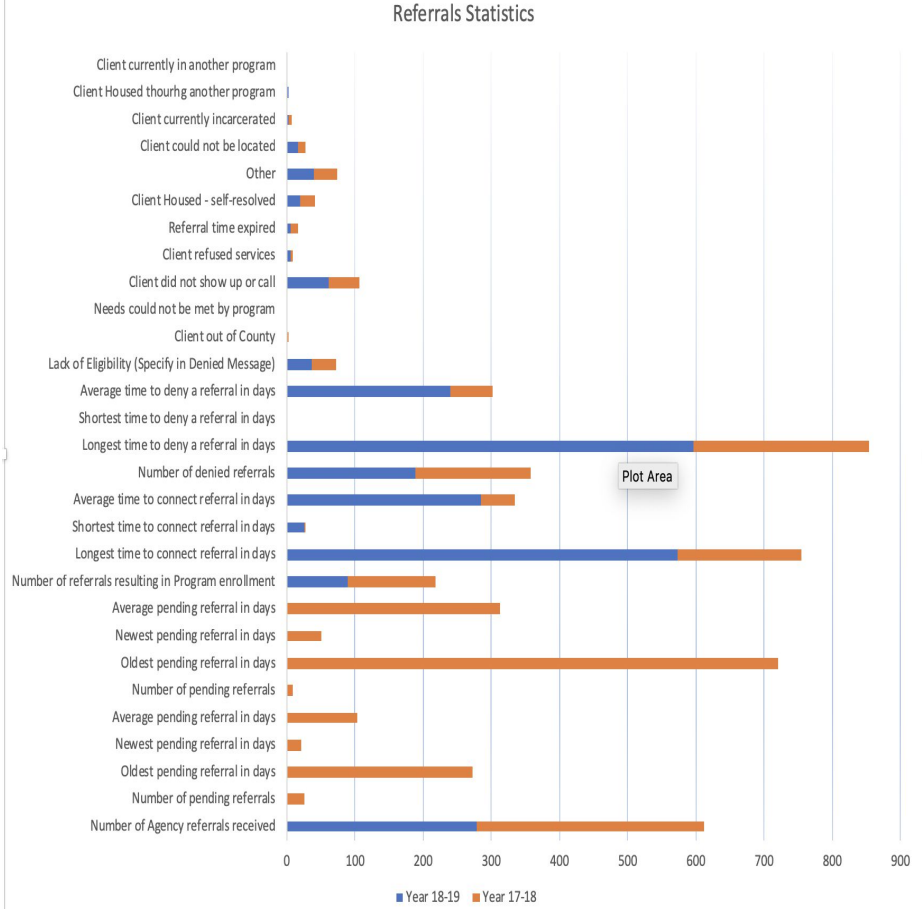
Selecting the data and making a chart

OUR FRIEND, EXCEL

Referral Statistics	
Dates Between:	02/01/2017 and 02/01/2018
Referral Direction:	Inbound
Number of Agency referrals received	278
Pending Referrals	
Number of pending referrals	0
Oldest pending referral in days	0
Newest pending referral in days	0
Average pending referral in days	0
Pending - In Process Referrals	

From Excel data to Excel chart

	2018-2019	2017-2018
Number of Agency referrals received	334	278
Pending Referrals		
Number of pending referrals	26	0
Oldest pending referral in days	273	0
Newest pending referral in days	21	0
Average pending referral in days	104	0
Completed Referrals		
Number of referrals resulting in Program enrollment	8	0
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Denied Referrals		
Number of denied referrals	129	90
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Breakdown Of Most Common Denied Referral Reasons		
Denied Referrals		
Lack of Eligibility (Specify in Denied Message)	170	188
Client out of County	257	597
Needs could not be met by program	0	0
Client did not show up or call	61	240
Client refused services		
Referral time expired	35	37
Client Housed - self-resolved	1	1
Other	45	61
Client could not be located	4	5
Client currently incarcerated	10	6
	22	19
	35	39
	11	16
	4	3
	2	0
	1	0



PIVOT TABLES

&

PIVOT CHARTS

USING PIVOT TABLES

- A pivot table is a special type of summary table that's unique to Excel
- Pivot tables are great for summarizing values in a table because they do their magic without making you create formulas to perform the calculations
- Pivot tables also let you play around with the arrangement of the summarized data
- You can change the arrangement of the summarized data on the fly simply by rotating row and column headings-that's what gives the pivot table its name

USING PIVOT TABLES

USEFUL TIPS

You can build a pivot table in about one minute

Use a pivot table to count things

Use a pivot table to build a list of unique values

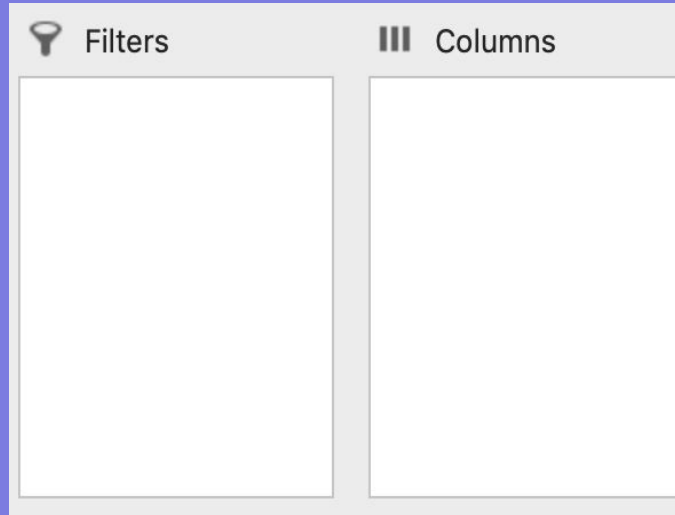
Group numeric data into ranges

Rename fields for better readability

	A	B	C
1	Country	(All) ▼	
2			
3	Row Labels ▼	Sum of Amount	
4	Apple	191257	
5	Banana	340295	
6	Beans	57281	
7	Broccoli	142439	
8	Carrots	136945	
9	Mango	57079	
10	Orange	104438	
11	Grand Total	1029734	
12			

USING PIVOT TABLES-DROP ZONES DEFINED

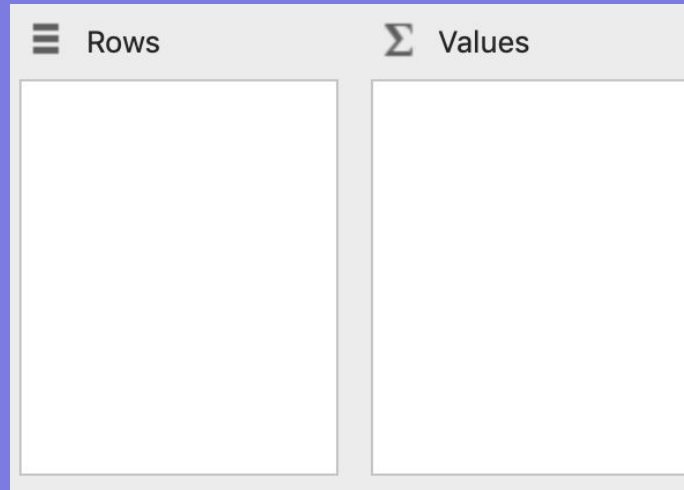
Report Filter: This area contains the fields that enable you to page through the data summaries shown in the actual pivot table by filtering out sets of data – they act as the filters for the report. So, for example, if you designate the Year field from a table as a Report Filter, you can display data summaries in the pivot table for individual years or for all years represented in the table.



Column Labels: This area contains the fields that determine the arrangement of data shown in the columns of the pivot table.

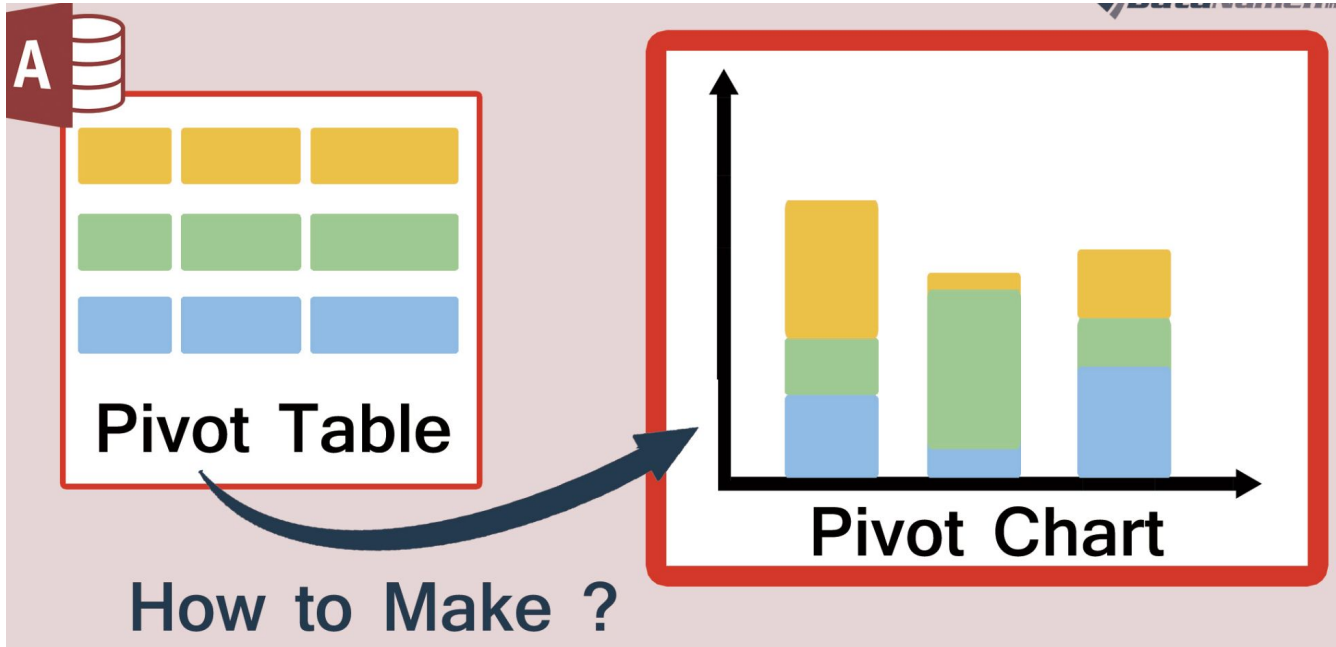
USING PIVOT TABLES - DROP ZONES DEFINED

Row Labels: This area contains the fields that determine the arrangement of data shown in the rows of the pivot table



Values: This area contains the fields that determine which data are presented in the cells of the pivot table – they are the values that are summarized in its last column (totaled by default)

USING PIVOT TABLES-PIVOT CHARTS



USING PIVOT TABLES-PIVOT CHARTS

- A pivot chart is especially useful when dealing with tremendous amounts of data
- A pivot chart is the visual representation of a pivot table in Excel
- Pivot charts and pivot tables are connected with each other

HOW TO GUIDES FOR EXCEL AND PIVOT TABLES

HOW TO MAKE A
CHART OR GRAPH IN
EXCEL

HOW TO QUICKLY
CREATE A PIVOT
TABLE

Let's
DO
THIS!

NEXT STEPS: CREATING A CHART/GRAPH USING HMIS REPORTS

- Log into HMIS
- Pull a canned report [OUTS-107] Households Served Report
- Export the report in an Excel format
 - Remember to make a copy
- Begin creating a chart from the data you have exported
 - Have fun with this and do not worry if it doesn't look perfect
 - This is when you want to mess up
 - Practice makes perfect

NEXT STEPS: CREATING A PIVOT TABLE AND PIVOT CHART

- Pull up the excel spreadsheet you received
- Decide what data you would like to explore
- Create the Pivot table
- Explore what happens when you rearrange the Drop Zones
 - Have fun with this and do not worry if it doesn't look perfect
 - This is when you want to mess up
 - Practice makes perfect

QUESTIONS, COMMENTS AND/OR CONCERNS?





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