IDA Quarterly Data Cleanup | Part 1 Instructions for FOs

SUMMARY: Downloading & Formatting Data Reports (Intake & Exit)

1. Login to Outcome Tracker (OT).

2. Click the Reports tab.

3. Go to Shared Reports > Oregon IDA Network - Shared Network Reports > Quarterly Reports

4. Click: *NP Data Collection--Intake Data Report*

    - **Later, repeat all steps for: *NP Data Collection--Exit Data Report***

5. Click the Results tab. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

6. When the Results tab loads, you'll see a new screen.

7. Scroll to the right. You'll see the Prompted Fields.

8. Update the Prompted Fields to the start date and end date of the quarter you're reporting.

    - **NOTE: Please use the dates from the Part 1 reminder email (dates change each quarter).**

    - Example of past Start Date & End Date **(do not use these exact dates)**:
        - IDA Account Application Date From Date = 01/01/2021
        - IDA Account Application Date To Date = 03/31/2021

9. Click GO. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

10. When the screen changes, scroll all the way to the right until you see the Tasks box.

11. Click Export to Excel. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

12. When the prompt appears, select Save File. Click OK.

13. The Excel spreadsheet will likely save in your Downloads folder. Your browser may also have shortcuts to quickly open it – such as the downloads button, or at the bottom of the browser.

    - *Note: Your browser may block the OT download/pop-up.*
      In Firefox, you can allow OT downloads/pop-ups here:
      Settings > Privacy & Security > Permissions > Block pop-up windows >
      Exceptions > Address: https://www.vistashare.com > Allow > Save

14. Open the Excel spreadsheet (you'll now apply Conditional Formatting to highlight blank cells).

15. Click the small box with the triangle (in the top left corner). This will select all cells.

16. In the Toolbar, click "Conditional Formatting". A drop-down menu will appear. Click "New Rule".

17. Click "Format only cells that contain". Change "Cell Value" to "Blanks". Click the "Format" button.

18. Click the "Fill" tab. Select any bright color. Click OK twice.

19. Blank cells will now be highlighted, showing where data is missing in OT.

20. After creating both spreadsheets, review them for blank cells (now highlighted).

21. For data you don't have, see **Handling Missing Data** in the **Part 1 & 2 Overview (see Toolbox)**.

22. Enter as much missing data in OT as possible by the **due date**.

23. **IMPORTANT – Repeat all steps for: *NP Data Collection--Exit Data Report***

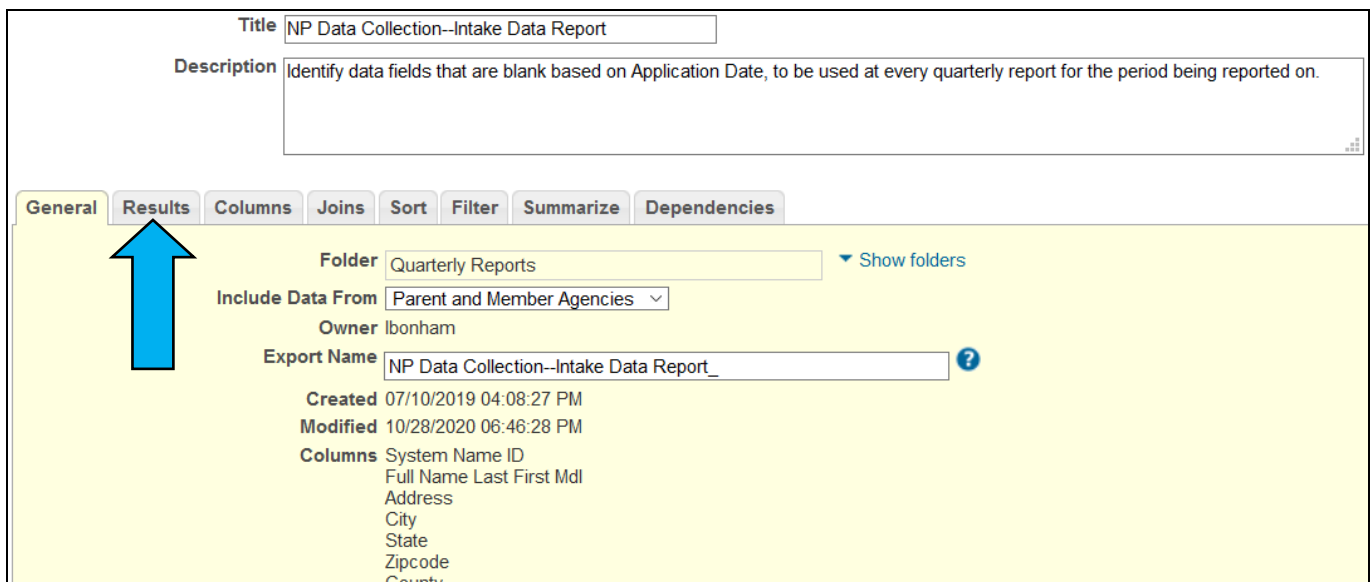24. **Email Derrick with any questions, and to briefly confirm completion of Part 1.**

SCREENSHOTS: Downloading & Formatting Data Reports (Intake & Exit)

1. Login to Outcome Tracker (OT).

2. Click the Reports tab.

3. Go to Shared Reports > Oregon IDA Network - Shared Network Reports > Quarterly Reports

4. Click: ***NP Data Collection--Intake Data Report***

   - **Later, repeat all steps for: *NP Data Collection--Exit Data Report***
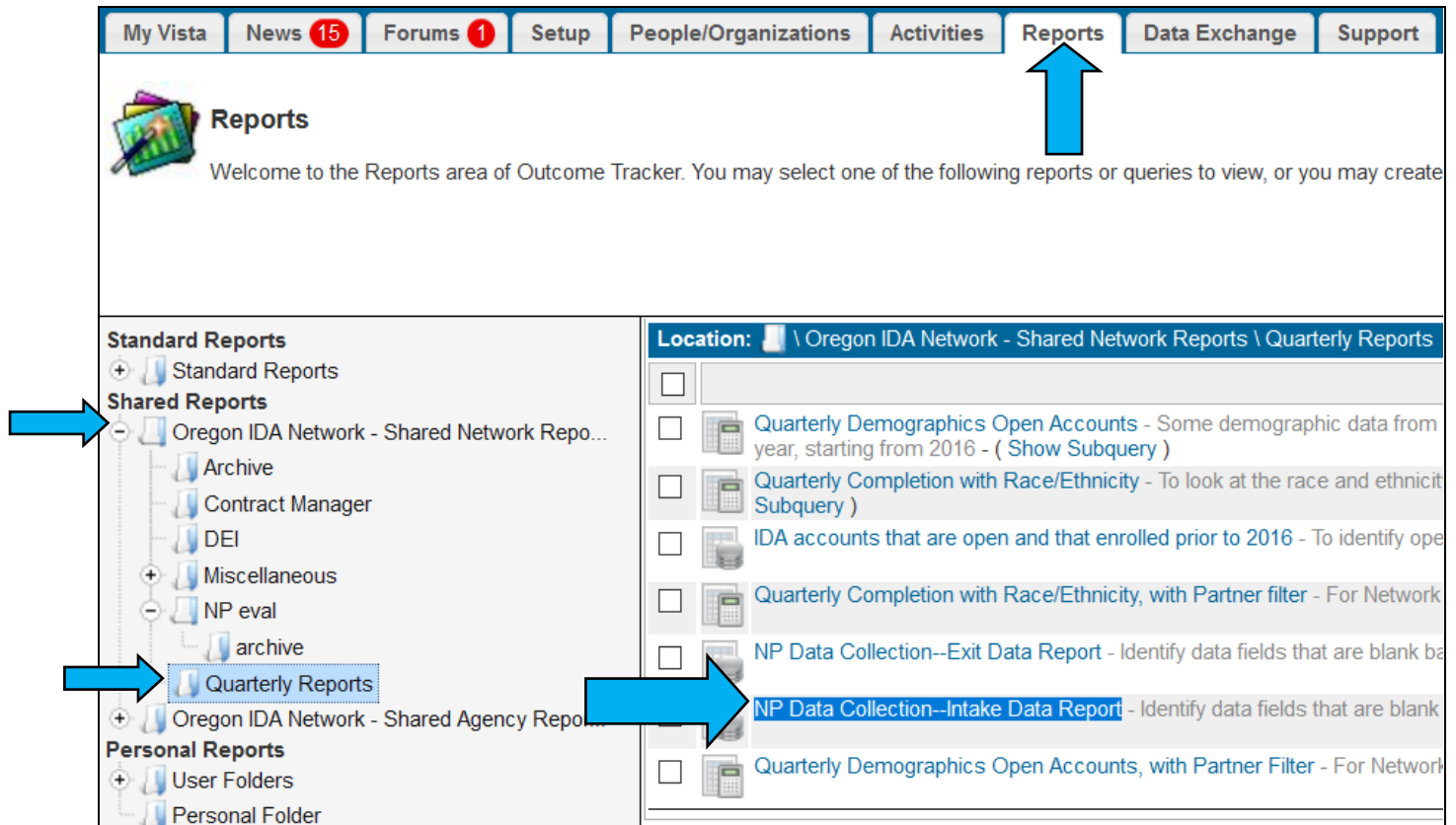
5. Click the Results tab. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

6. When the Results tab loads, you'll see a new screen that looks like this:

7. Scroll to the right. You'll see the Prompted Fields.

8. Update the Prompted Fields to the start date and end date of the quarter you're reporting.

- **NOTE: Please use the dates from the Part 1 reminder email (dates change each quarter).**
- Example of past Start Date & End Date **(do not use these exact dates)**:
  - o IDA Account Application Date From Date = 01/01/2021
  - o IDA Account Application Date To Date = 03/31/2021

9. Click GO. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

10. When the screen changes, scroll all the way to the right until you see the Tasks box.

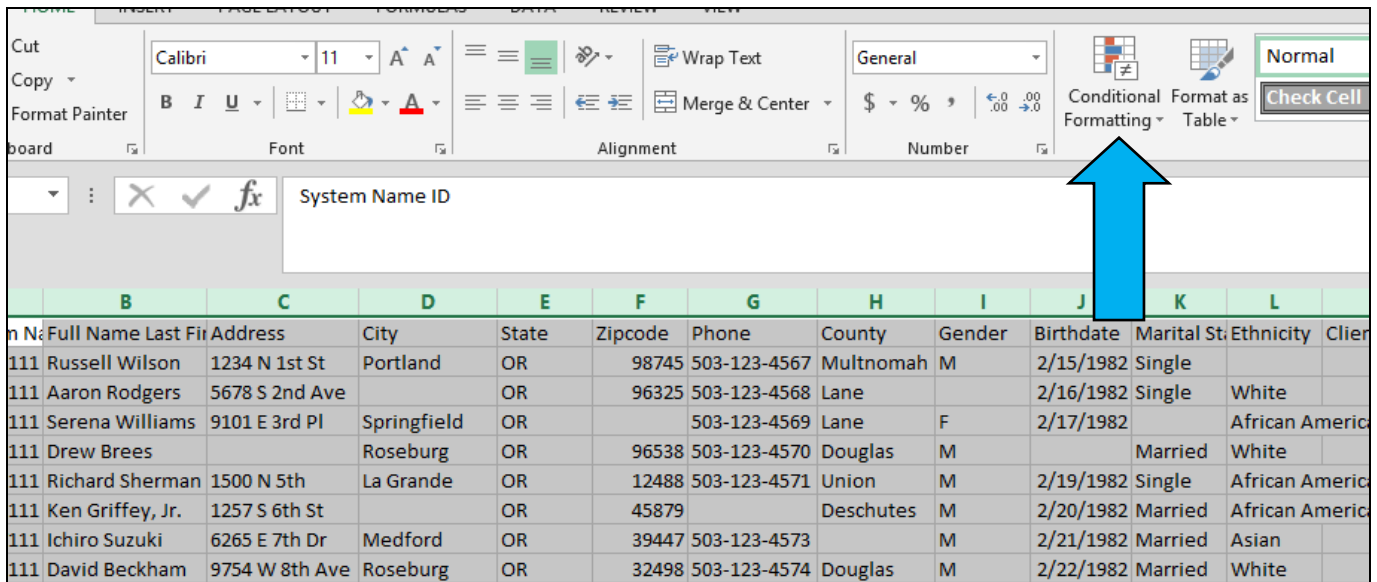**11.** Click Export to Excel. (**NOTE:** Click only once. It loads very slowly, so give it a minute.)

12. When the prompt appears, select Save File. Click OK.

13. The Excel spreadsheet will likely save in your Downloads folder. Your browser may also have shortcuts to quickly open it – such as the downloads button, or at the bottom of the browser.

- ***Note: Your browser may block the OT download/pop-up.***
  In Firefox, you can allow OT downloads/pop-ups here:
  Settings > Privacy & Security > Permissions > Block pop-up windows >
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14. Open the Excel spreadsheet (you'll now apply Conditional Formatting to highlight blank cells).

15. Click the small box with the triangle (in the top left corner). This will select all cells.

(NOTE: This example shows fake participant data.)

16. In the Toolbar, click "Conditional Formatting". A drop-down menu will appear. Click "New Rule".

17. Click "Format only cells that contain". Change "Cell Value" to "Blanks". Click the "Format" button.

18. Click the "Fill" tab. Select any bright color. Click OK twice.

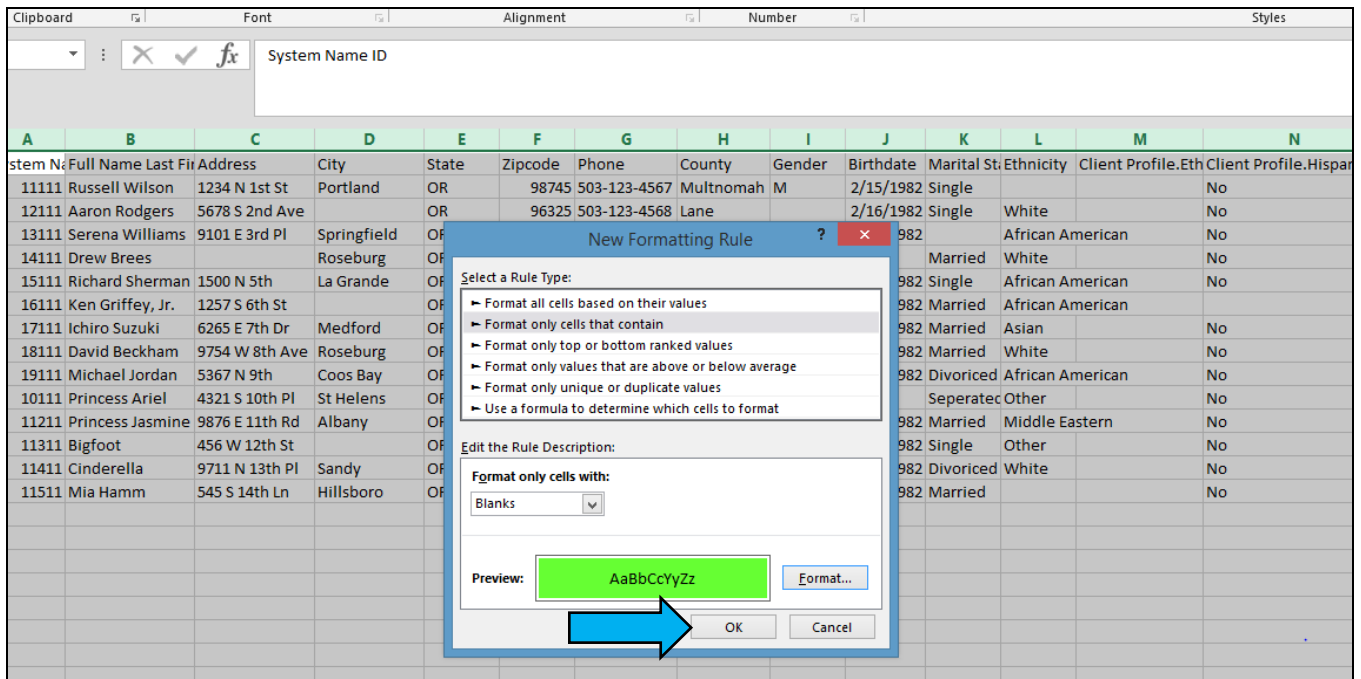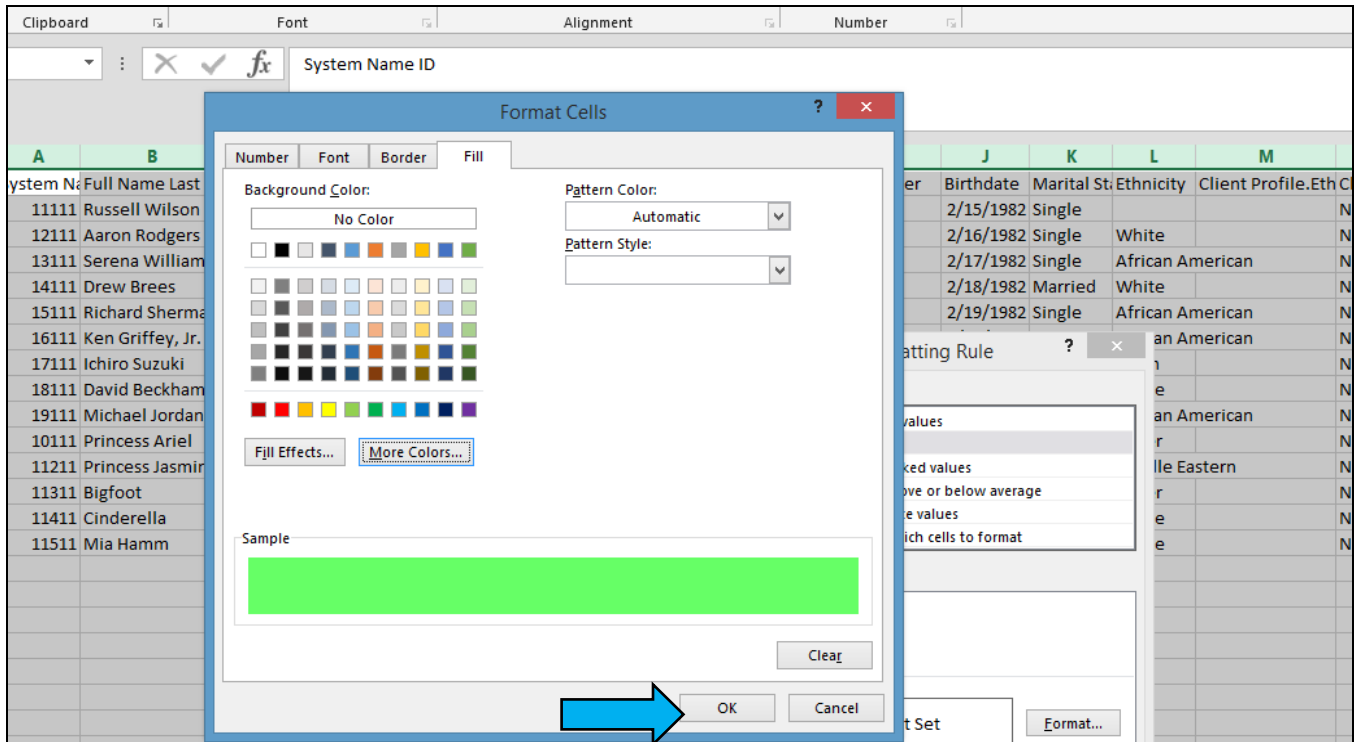**19.** Blank cells will now be highlighted, showing where data is missing in OT:

System Na	Full Name Last Fir	Address	City	State	Zipcode	Phone	County	Gender	Birthdate	Marital Sta	Ethnicity	Client Profile.Eth	Client Profile.Hispanic?	Client Profile.Country of Origin	Client Profile.Langu
11111	Russell Wilson	1234 N 1st St	Portland	OR	98745	503-123-4567	Multnomah	M	2/15/1982	Single			No	United States	English
12111	Aaron Rodgers	5678 S 2nd Ave		OR	96325	503-123-4568	Lane		2/16/1982	Single	White		No	United States	English
13111	Serena Williams	9101 E 3rd Pl	Springfield	OR		503-123-4569	Lane	F	2/17/1982		African American		No	United States	English
14111	Drew Brees		Roseburg	OR	96538	503-123-4570	Douglas	M		Married	White		No	United States	English
15111	Richard Sherman	1500 N 5th	La Grande	OR	12488	503-123-4571	Union	M	2/19/1982	Single	African American		No	United States	English
16111	Ken Griffey, Jr.	1257 S 6th St		OR	45879		Deschutes	M	2/20/1982	Married	African American			United States	
17111	Ichiro Suzuki	6265 E 7th Dr	Medford	OR	39447	503-123-4573		M	2/21/1982	Married	Asian		No	Japan	Japanese
18111	David Beckham	9754 W 8th Ave	Roseburg	OR	32498	503-123-4574	Douglas	M	2/22/1982	Married	White		No	England	English
19111	Michael Jordan	5367 N 9th	Coos Bay	OR	97854	503-123-4575	Coos	M	2/23/1982	Divoriced	African American		No	United States	English
10111	Princess Ariel	4321 S 10th Pl	St Helens	OR	96632	503-123-4576	Columbia	F		Seperated	Other		No		English
11211	Princess Jasmine	9876 E 11th Rd	Albany	OR		503-123-4577	Linn	F	2/25/1982	Married	Middle Eastern		No	Saudi Arabia	Arabic
11311	Bigfoot	456 W 12th St		OR	45791	503-123-4578	Jefferson	M	2/26/1982	Single	Other		No	United States	
11411	Cinderella	9711 N 13th Pl	Sandy	OR	97884	503-123-4579	Clackamas	F	2/27/1982	Divoriced	White		No	England	English
11511	Mia Hamm	545 S 14th Ln	Hillsboro	OR	12355	503-123-4580	Washington	F	2/28/1982	Married			No	United States	English

20. After creating both spreadsheets, review them for blank cells (now highlighted).

21. For data you don't have, see **Handling Missing Data** in the **Part 1 & 2 Overview (see Toolbox)**.

22. Enter as much missing data in OT as possible by the **due date**.

23. IMPORTANT – Repeat all steps for: *NP Data Collection--Exit Data Report*

24. Email Derrick with any questions, and to briefly confirm completion of Part 1.