Welcome

Zoho Analytics - Advanced Training

Today's Theme:
Compliance

extended**Reach**
powered by k care

Quick Tips for Maximizing This Session
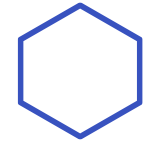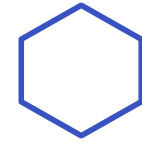
- Use multiple monitors if you have them
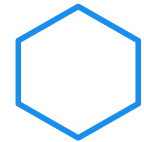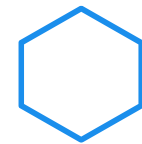
- Take Zoom out of Full-screen mode

- Add questions to the chat to be addressed at the end of the session

extendedReach Zoho Support Team

⬡ **Mary Ellen Wallace**
Business Intelligence Analyst

⬡ **Miranda Shoemaker**
Support Specialist
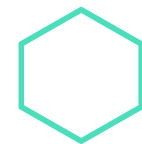
⬡ **Nicole Snyder**
Director of Customer Experience
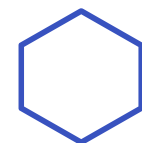
⬡ **Judy Bienvenu**
Support Consultant

Agenda

- Brief overview of Zoho Analytics

- Compliance Reports Demo

  - Activities: Service Date vs Completed Date

  - Compliance – Activities and Reports

- How to get help

This webinar is being recorded and will be posted in our Help Center, and we will share a link in an email to all who registered.

Functionality we'll cover:

- Modifying column names

- Formatting dates and numbers

- Filters and User Filters

- Conditional formatting

Relax and Absorb What You Can

What is Zoho Analytics?

Zoho is a 3rd party custom report and dashboard builder included in our Plus and Enterprise packages.

It allows you to quickly build charts, tables, and dashboards using an intuitive drag-and-drop interface.

Zoho uses data from extendedReach and updates the data automatically each night - so your reports are always up to date.
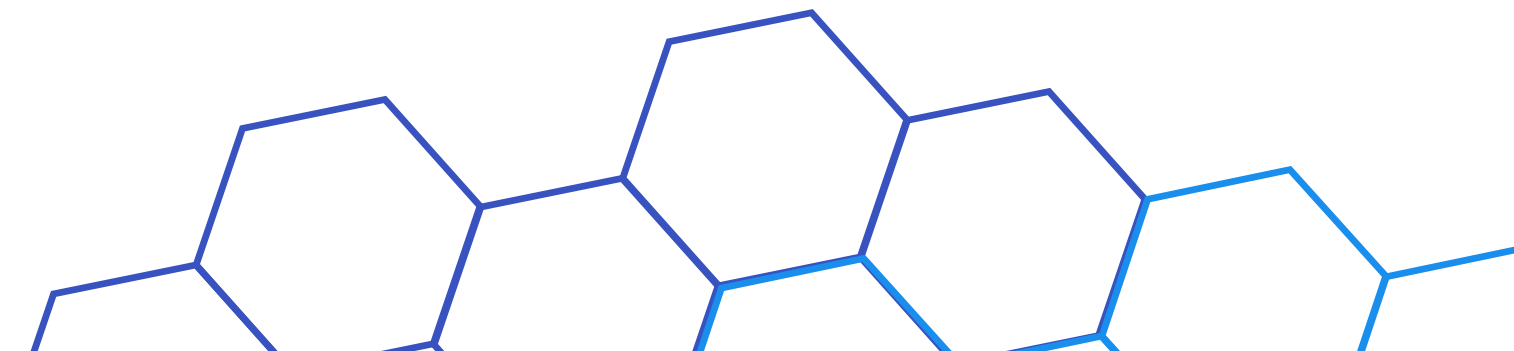
How do I access Zoho Analytics?

Zoho Analytics can be accessed through System Settings (GCM) or Organization Settings (FC).
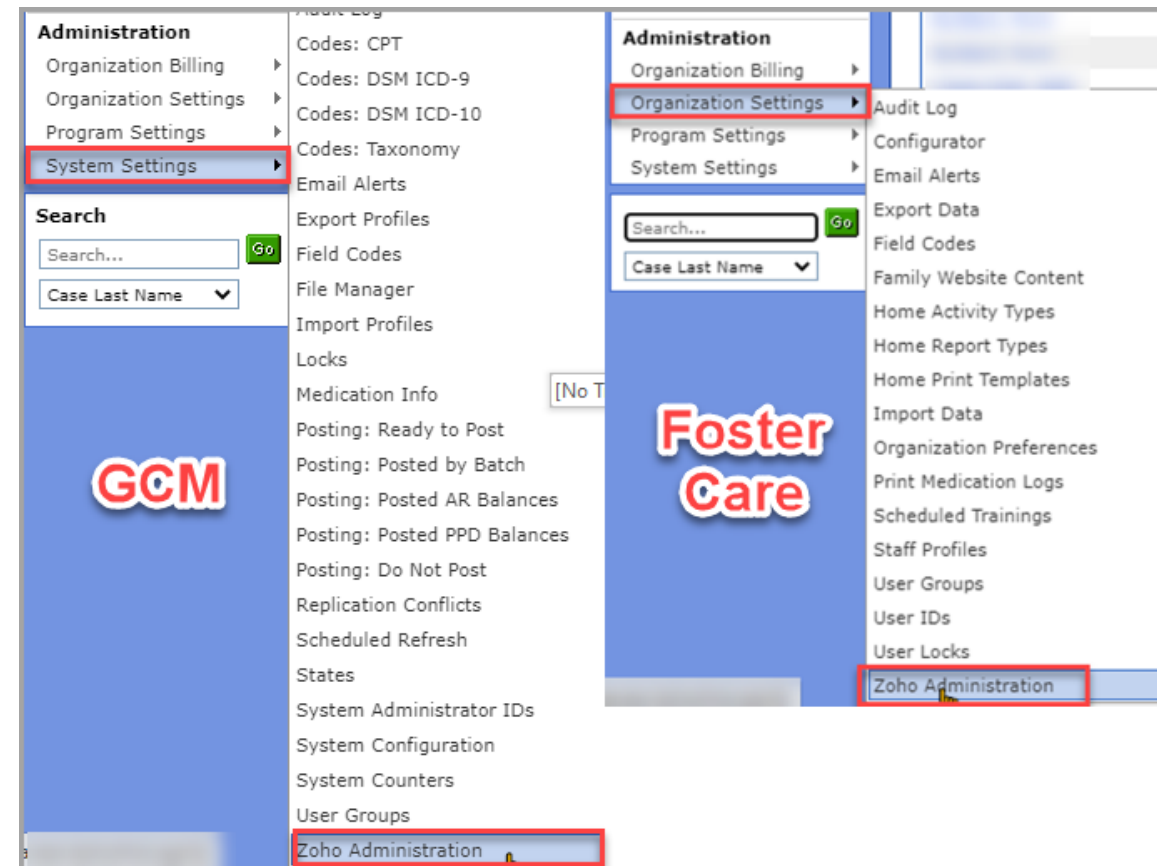
Select 'Zoho Administration' and copy the password that appears in the resulting popup.
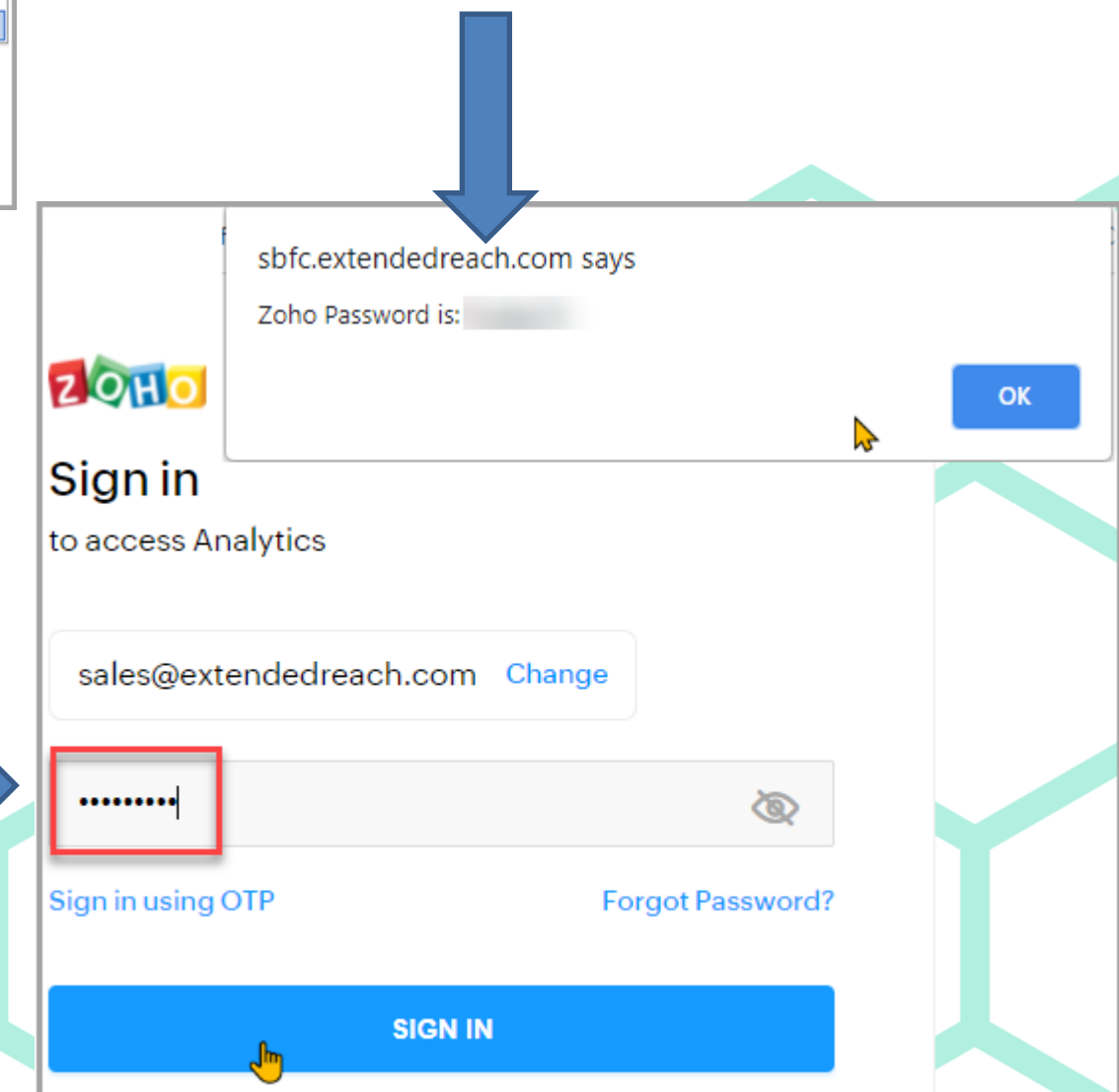
Paste that password into the Zoho login page and click Sign In.

Multi-Factor Authentication

ZOHO

Enable Two Factor Authentication.

Secure your Zoho Account.

Because stronger passwords alone aren't enough to protect your account from password breaches. Add an extra layer of security to authenticate your login through any one of the following:

○ OneAuth (Recommended)

Supports Face ID, Touch ID, Fingerprint, Push Notification, QR Code, and TOTP

INSTALL NOW

○ Mobile Number

○ Time-based OTP Authenticator

○ YubiKey

Remind me later

Click 'Remind me later' in the bottom right corner to continue logging in.

Let's Dive In!

- Activities: Service Date vs Completed Date

- Compliance – Activities and Reports

Activities: Service Date vs. Completed Da

Activities: Service Date vs. Completed Date ☆ ↻ 🖫 ⋮

[Underlying Data] [Themes]

ActivityDate:
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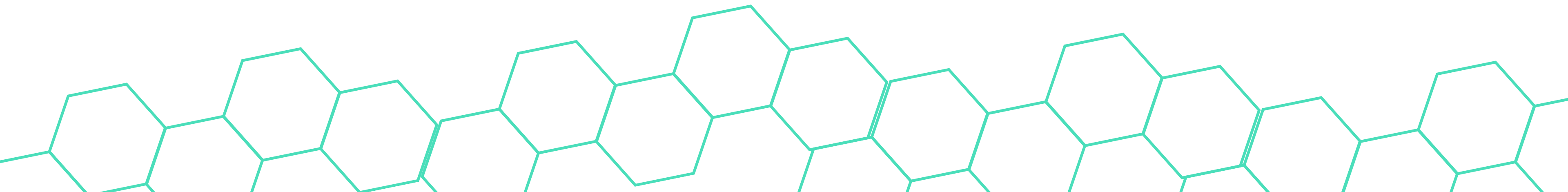|	Name	ActivityType	PerformedBy	ActivityDate	CompletedOn	Total DaysToCompletion
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24	Allen, Simon	Foster Home Visit (Web Form)	Johanna Brooks	11/11/20	11 Nov 2020	0

Activities: Service Date vs. Completed D[...]

User Filters →

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| Underlying Data | Themes |

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Conditional formatting

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Format Numbers

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Conditional formatting ←

Format Dates ←

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Activities: Service Date vs. Completed Da

User Filters

Column names

Conditional formatting

Format Dates

Format Numbers

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Underlying Data   Themes

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Compliance – Activities and Reports

Compliance - Activities and Reports
Shows compliance data for all activities and reports for cases and homes

Edit Design

Sort | Underlying Data | Themes

	ActivityOrReport	Type	Caseworker	DateDue	Date	Status	OnTime	PerformedBy	CompletedOn	Name
1	Activity	Admission Interview	Julie Brown	-No Value-	06/08/2021	Completed	No Due Date	Julie Brown	06/08/2021	Barrone, Sofia
2		Ascendle Activity with Due Date no time	Alexander Popov	06/05/2021	-No Value-	Due	In Process	Alexander Popov	-No Value-	Bundy, Teddy
3			Barb Odenweller	03/05/2021	-No Value-	Due	In Process	Barb Odenweller	-No Value-	Stark, Tony
4			Brad Jackson	08/05/2021	-No Value-	Due	In Process	Brad Jackson	-No Value-	Braverman, Julia
5			Johanna Brooks	06/05/2020	-No Value-	Due	In Process	Johanna Brooks	-No Value-	Allen, Simon
6				05/05/2021	-No Value-	Due	In Process	Johanna Brooks	-No Value-	Stevie, Budd
7			Julie Brown	09/05/2020	03/30/2021	Completed	Late	Julie Brown	03/30/2021	Barrone, Sofia
8				10/05/2020	-No Value-	Due	In Process	Annie Admin	-No Value-	Barrone, Sofia
9			Lady Grown	05/05/2021	-No Value-	Due	In Process	Lady Grown	-No Value-	Nadir, Abed
10			Leslie Mozisek	05/05/2021	-No Value-	Due	In Process	Leslie Mozisek	-No Value-	Rawr, Ollie
11			Mario Rip	06/05/2021	-No Value-	Due	In Process	Mario Rip	-No Value-	Ike, Broflovski
12			Miranda ZZshoemaker	05/05/2021	-No Value-	Due	In Process	Miranda ZZshoemaker	-No Value-	Bluejay, Mordecai
13										Burger, Louise

Compliance – Activities and Reports

Compliance - Activities and Reports ☆ ↻ 🖫 ⋮

Shows compliance data for all activities and reports for cases and homes

Edit Design + Zia Insight

| Sort | Underlying Data | Themes | ▦ | ▥ | ⤢ |

ActivityOrReport ↓	Type ↓	Caseworker ↓	DateDue ↓	Date ↓	Status ↓	OnTime ↓	PerformedBy ↓	CompletedOn ↓	Name ↓

| Pivot | Filters (1) | User Filters | Reset All |

Filters: Clear All Filters   Actual Values(OnTime)

| OnTime | Actual ⌄ ✕ |

Individual Values | Wildcard

☐ In Process
☐ Late
☐ No Due Date
☑ On Time

Exclude Items ⌄   Clear All

✕ On Time

| 8 | | | 10/05/2020 | -No Value- | Due | In Process | Annie Admin | -No Value- | Barrone, Sofia |
9		Lady Grown	05/05/2021	-No Value-	Due	In Process	Lady Grown	-No Value-	Nadir, Abed
10		Leslie Mozisek	05/05/2021	-No Value-	Due	In Process	Leslie Mozisek	-No Value-	Rawr, Ollie
11		Mario Rip	06/05/2021	-No Value-	Due	In Process	Mario Rip	-No Value-	Ike, Broflovski
12		Miranda ZZshoemaker	05/05/2021	-No Value-	Due	In Process	Miranda ZZshoemaker	-No Value-	Bluejay, Mordecai
13									Burger, Louise

Zoho Help Resources

Since Zoho is a 3rd party application, their support team is available to help you with questions about how Zoho works. You'll get the best response by emailing support@zohoanalytics.com.

Note: If you use the Help link from within the Zoho application, the email will be copied to the eR helpdesk, but we will defer to Zoho to respond initially.

If you have questions about where to find your data in the eR tables within Zoho, the eR support team is happy to assist you.

We suggest you first check out our Help Center articles and FAQs, available through eR – just search for 'Zoho'. We are always adding to these resources, based on questions we receive from customers.

If you can't answer your question by referencing those resources, please send an email to support@extendedreach.com for any questions regarding eR data.
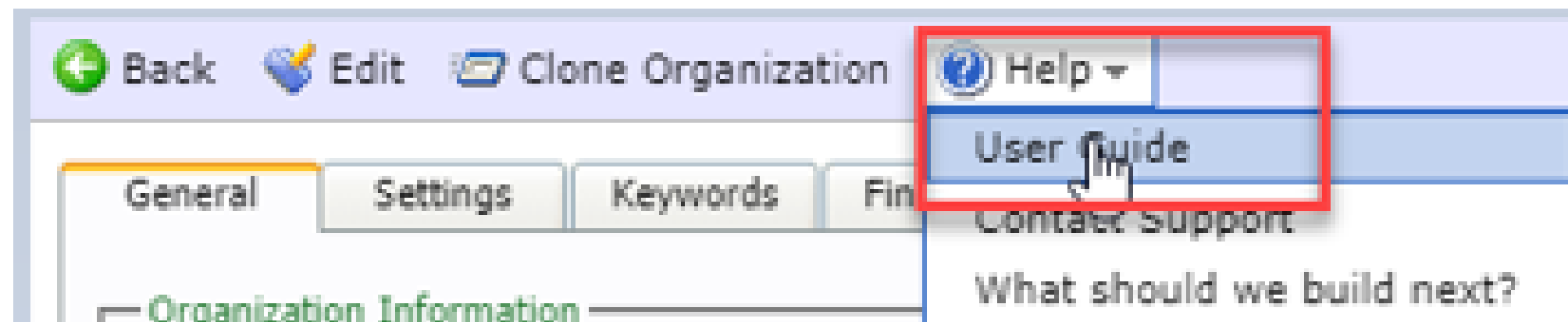
Zoho Help Resources

What we **CAN** do to support you:

We can help you troubleshoot issues you are having and provide general guidance on your Zoho questions, or we are happy to review a report or dashboard you have created to answer specific questions.

What we **CAN NOT** do at this time:

We cannot design, create, and build new reports or dashboards for you.

If that is something you need, we do have a company that we can recommend to you that would be able to provide these services.
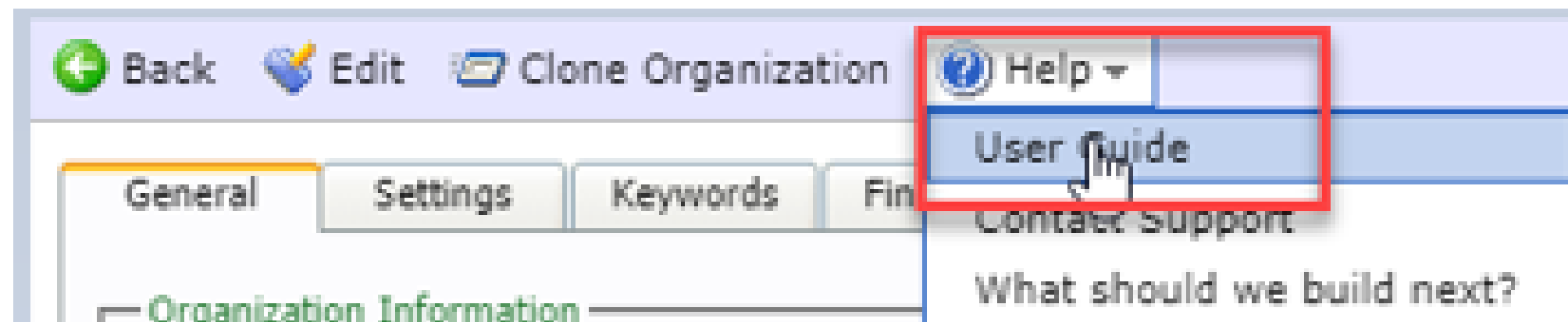
Your Support Request Should Include:

- As much **detail** as possible
- Examples of information that will **expedite** our investigation into the issue include:
  - What do you need to do?
  - What are you having trouble with?
  - Is there a specific report you are having difficulties with?
    - **Name of the report**
    - Paste the **URL** from your browser
- **Screenshot** of the issue

Additional Training Options

Zoho Analytics offers a monthly (free!) beginners course, as well as an Experts course. We highly recommend these trainings for anyone who will be working in Zoho.

https://www.zoho.com/analytics/training.html

Additional Training Options

The extendedReach team will be offering
a monthly Zoho training where we'll dive into
how to create reports and some Zoho tips and tricks,
focusing on different eR-related reports each time.

We plan to offer these trainings on the
First Tuesday of every month at 1pm CST.

Thank you for your time

Q & A

extended**Reach**
powered by k care