

# Welcome to the Troubleshooting Reports

We Will Begin Shortly

# Meet Your Trainer

Sabrina Gilbert

Training Team Lead

[trainingteam@bonterratech.com](mailto:trainingteam@bonterratech.com)



# Learning Objective

This session will provide tips and tricks for troubleshooting the most common challenges users face when using reports.

# Agenda

Missing Report

Missing Data

White Screen

# Missing Report

# Missing Report

Refresh Report List

Refresh Browser

Admin Grant Access

The screenshot shows a web interface titled "View Reports". At the top, there are four buttons: "Manage Reports", "Manage Report Universes", "ETO Results", and "Refresh Report List". The "Refresh Report List" button is highlighted with a red rectangular border. Below the buttons is a list of report categories, each with a plus sign icon to its left. The categories are: My Reports, Caseload Reports, Collection Reports, Demographics Reports, Disabled, Enrollment & Dismissal Reports, Entity Reports, ETO Engage, Family Reports, Housing Reports, Individual Participant Reports, Management Reports, Participant/Entity Match Reports, Program Group Reports, Referrals Reports, and TouchPoint Reports. The list is set against a light green background.

+	Category Name	Category De
+	My Reports	
+	Caseload Reports	
+	Collection Reports	
+	Demographics Reports	
+	Disabled	
+	Enrollment & Dismissal Reports	
+	Entity Reports	
+	ETO Engage	
+	Family Reports	
+	Housing Reports	
+	Individual Participant Reports	
+	Management Reports	
+	Participant/Entity Match Reports	
+	Program Group Reports	
+	Referrals Reports	
+	TouchPoint Reports	

# Missing Data

# Missing Data

- Respects Reporting Role
- Reports respect security in ETO
  - Caseload Restrictions
  - TouchPoint Security
  - Referral Security etc.
- Respect Filter Parameters

**Security for School Engagement Scale**

Add/View/Edit/Delete Own Responses | View/Edit/Delete Others' Responses | Share Responses Within Site | Share Responses Across Enterprise | Manage

Add Responses | **View Own Responses** | Edit Own Responses | Delete Own Responses

Participant (multiple) | Return to Managing School Engagement Scale | Save

**Note: Changes will not be saved until you click "Save". Clicking the checkbox will not save the changes to security.**

Select the user roles in each program that should be allowed to **view their own responses**.

Include disabled sites and programs

Site	Program	Enterprise Manager	Site Manager	Department Head	Program Manager	Staff	Funders/Reports Only	Intake	Survey Taker	Entity Self Service
<input type="checkbox"/> Site: April 2024 Admin Foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Chasity's Children's Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Missing Data

## Questions to Ask

- Do I have access to this data in ETO?
- Can I name a participant who should be showing but isn't?
  - When I review that participant's data in ETO does it fall within the date range and or program the report is filtering for?
- Can someone else on my team see the "missing" data in the report?



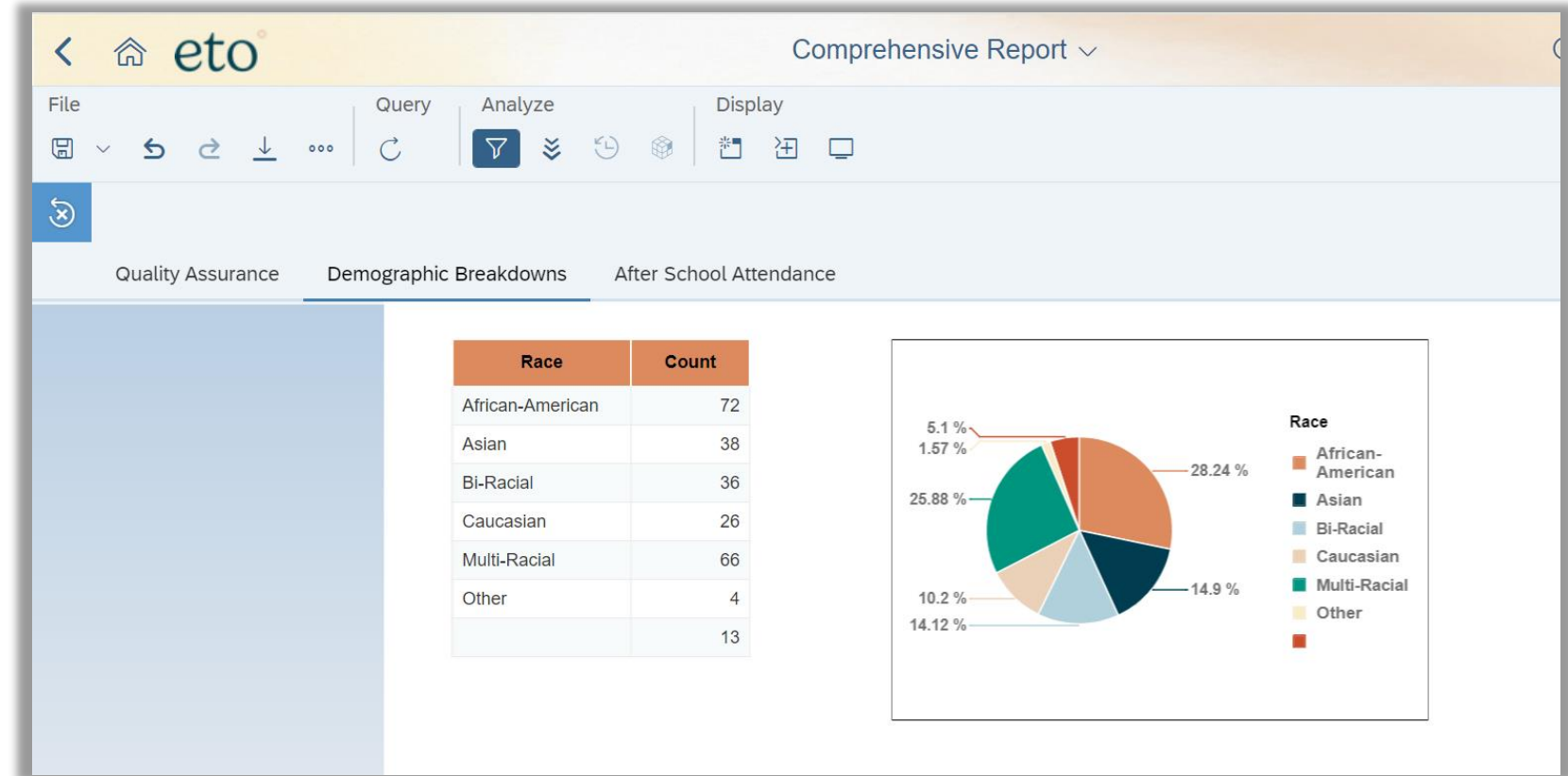
# White Screen

# White Screen

Check Report settings

Set default view format as Web

Set Default Creation/Editing Tool as Advanced or Interactive



# Additional Resources

# Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in  
our software!

# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email: [eto@bonterratech.com](mailto:eto@bonterratech.com)

# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.