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Welcome!

January 2025
Deeper Dive into Looker Training

JOURNEY TO 100

United Way
Orange County United Way

Agenda

1. Looker Best Practices Reminder
2. Custom Screen Fields
3. Custom Dimensions
4. Custom Measures
5. Table Calculations
6. Visualizations

Training materials and recording will be available on the OC HMIS website.

Looker Best Practices

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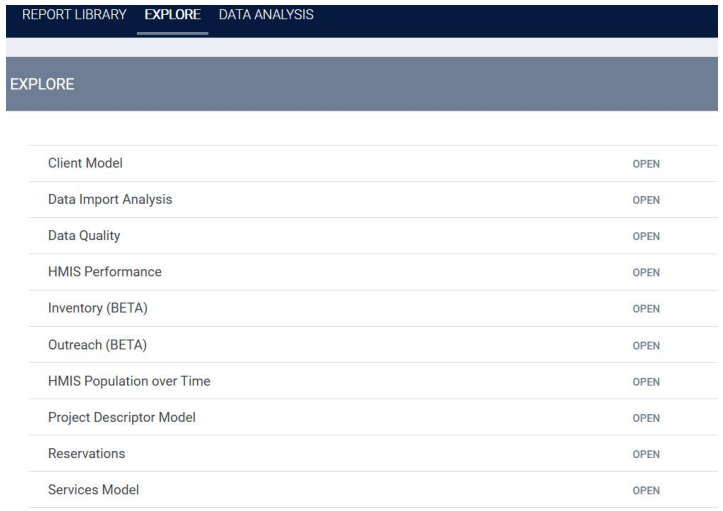
Looker Best Practices for …

Looker Models



HMIS Performance

- Best choice for most report
- Clients must have an enrollment to appear

Client Model

- Includes deleted

Use with Caution

not available in HMIS Model

Services Model

- Gives you access to data about services provided

Project Descriptor

- Gives you information about your project setup, bed inventory, and staff

Looker Best Practices for …

Creating Looks

- Keep Looks simple. Use available dimensions and measures as much as possible.
- Use table calculations as much as you want.
- Don't use more than 30 fields in your Look.
- Remove non-critical dimensions or measures.
- Apply filters to limit data.
- Select fields according to the screen where the data is collected.
- Use pivots strategically, and avoid over-using.
- Don't use the word "date" or "time" in a dimension group name.
- Please do not save over Looks you did not create or that were created by the HMIS Team.

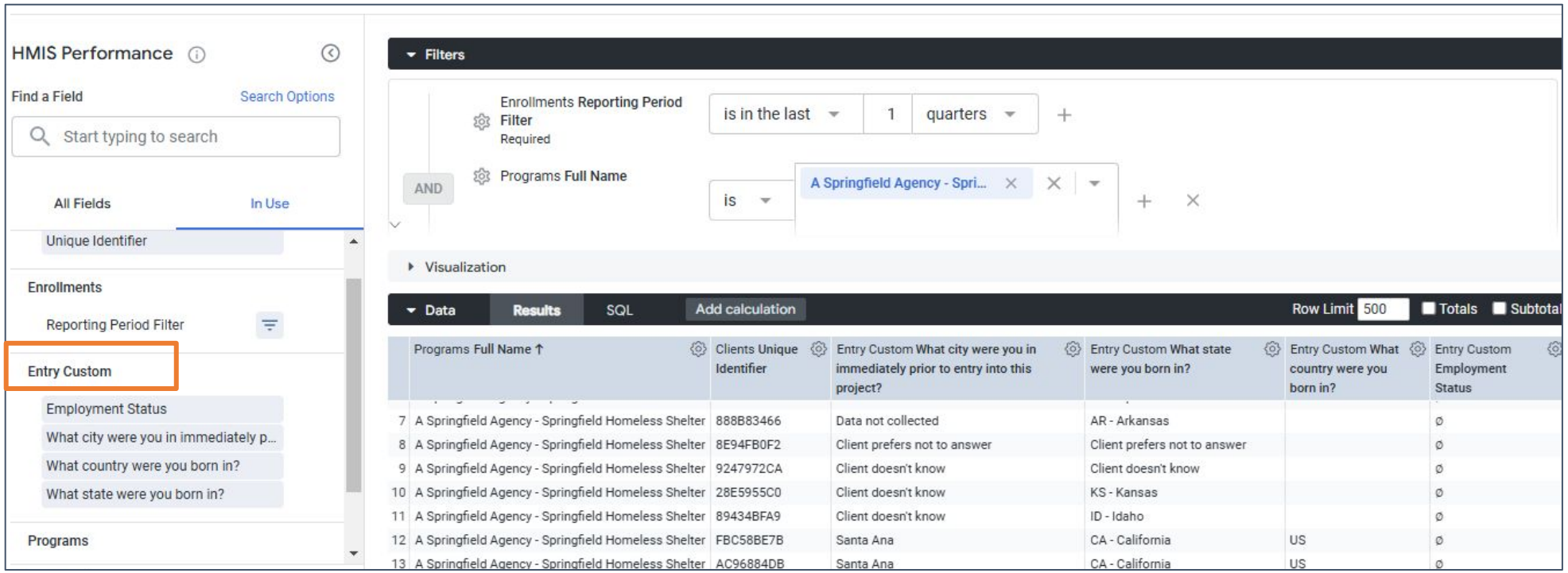
Custom Screen Fields

Custom Screen Fields

- Custom Questions in a program enrollment, assessment, or exit screen are called custom screen fields.
- Use the Custom Field Request Form to request any new fields for your screens.

Custom Screen Fields

- **Custom Screen fields** are located in the following Looker views:
  - Program Enrollment Screen fields are published to the **Entry Custom** view.
  - Assessments Screen are published to the **Client Assessment Custom** view.
  - Program Exit Screen fields are published to the **Update/Exit Custom** view.

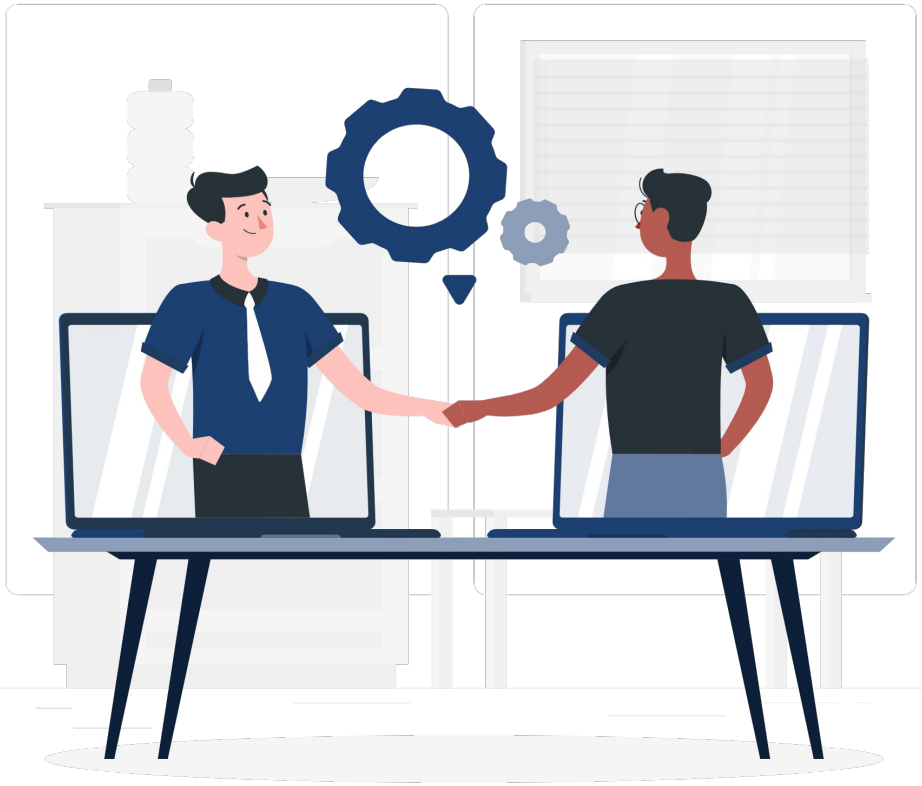


Custom Dimensions

Custom Dimensions

- Custom dimensions allow you to create new ad hoc fields for your reports.
- Dimensions may be several different data types, such as:
  - strings (text)
  - numbers
  - dates
  - Boolean values

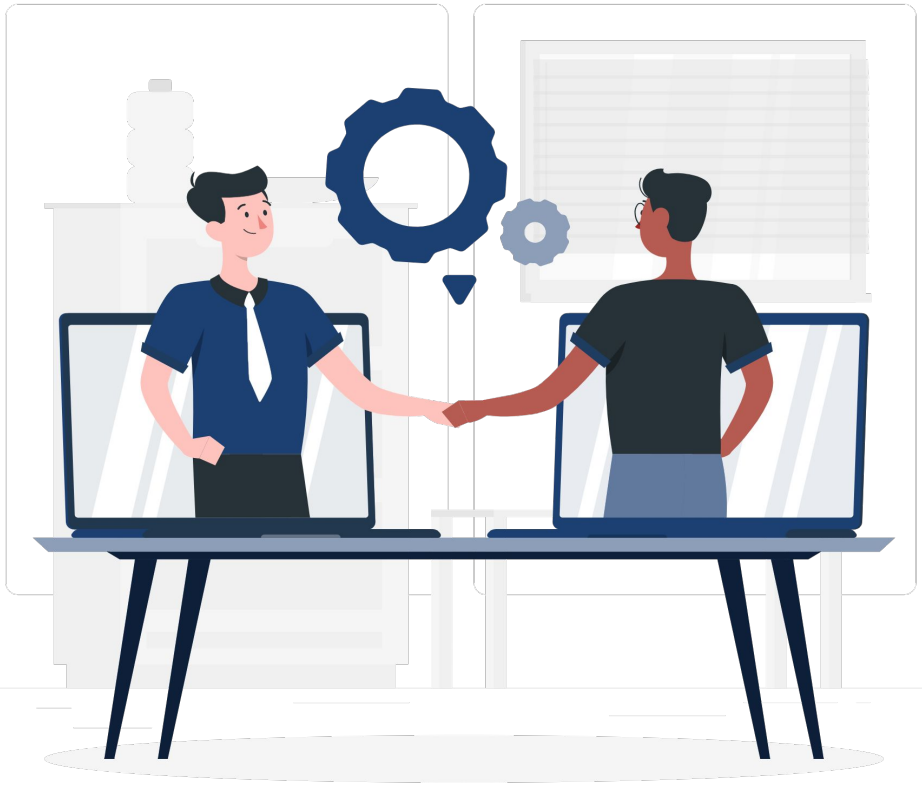
* NOTE: These fields may only be used within the report you are creating.



Graphic by: https://storyset.com/online

Custom Dimensions

- You may create a custom dimension based on
  - an existing field (grouping)
  - a Looker expression (If statements, Case statements, or simple text or numerical assignments)
- Dimensions may be aggregated (e.g. sum, avg. etc.) or non-aggregated.



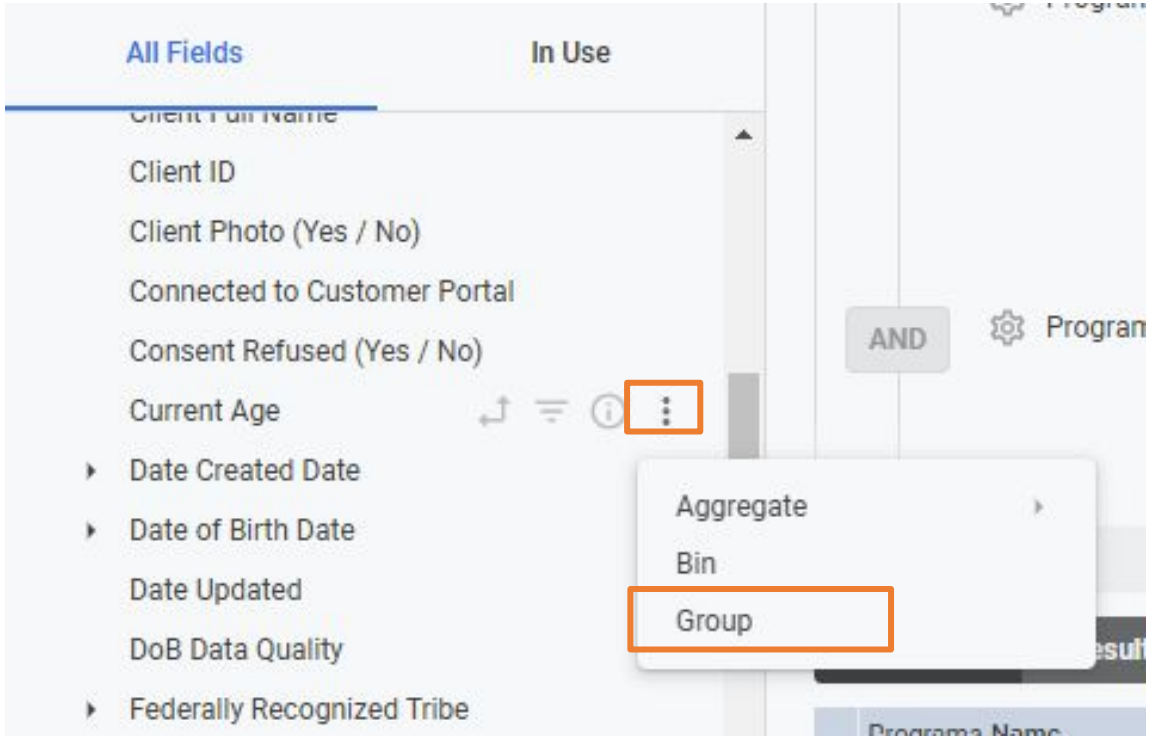
Graphic by: https://storyset.com/online

Creating Custom Dimensions with Groupings

Step 1: Locate the field in the field pane.

Step 2: Click on the 3 dots to display the dropdown menu.

Step 3: Click on “Group”.

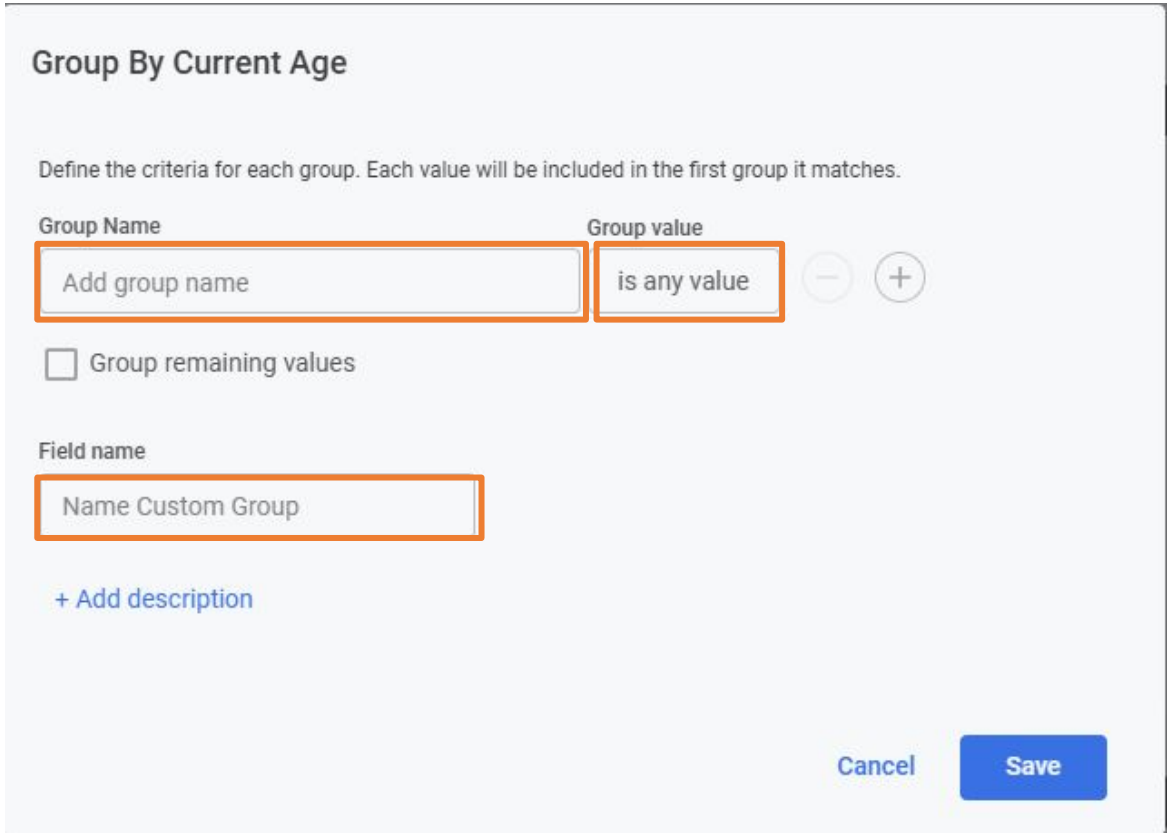


Creating Custom Dimensions

Step 4: Create a name for your dimension.

Step 5: Enter a group name in the “Group Name” box.

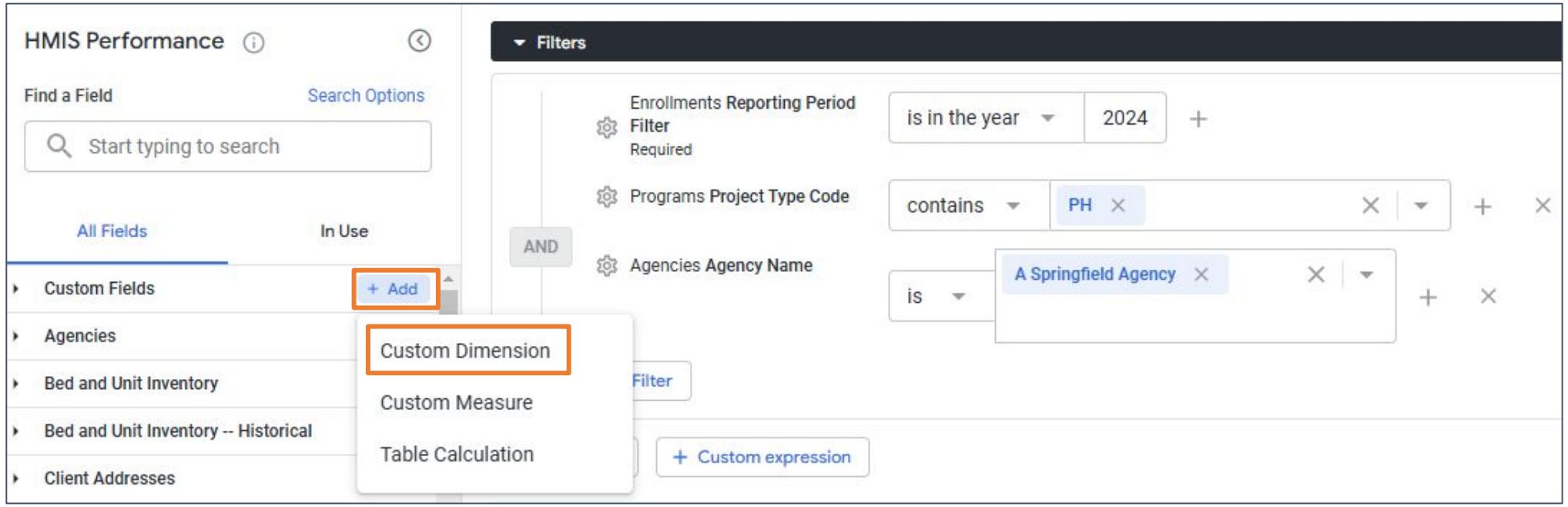
Step 6: Enter a group value in the “Group value” box.



Creating Custom Dimensions with Expressions

Step 1: Locate the “Custom Fields” view and click on the “+ Add” button to reveal the dropdown menu.

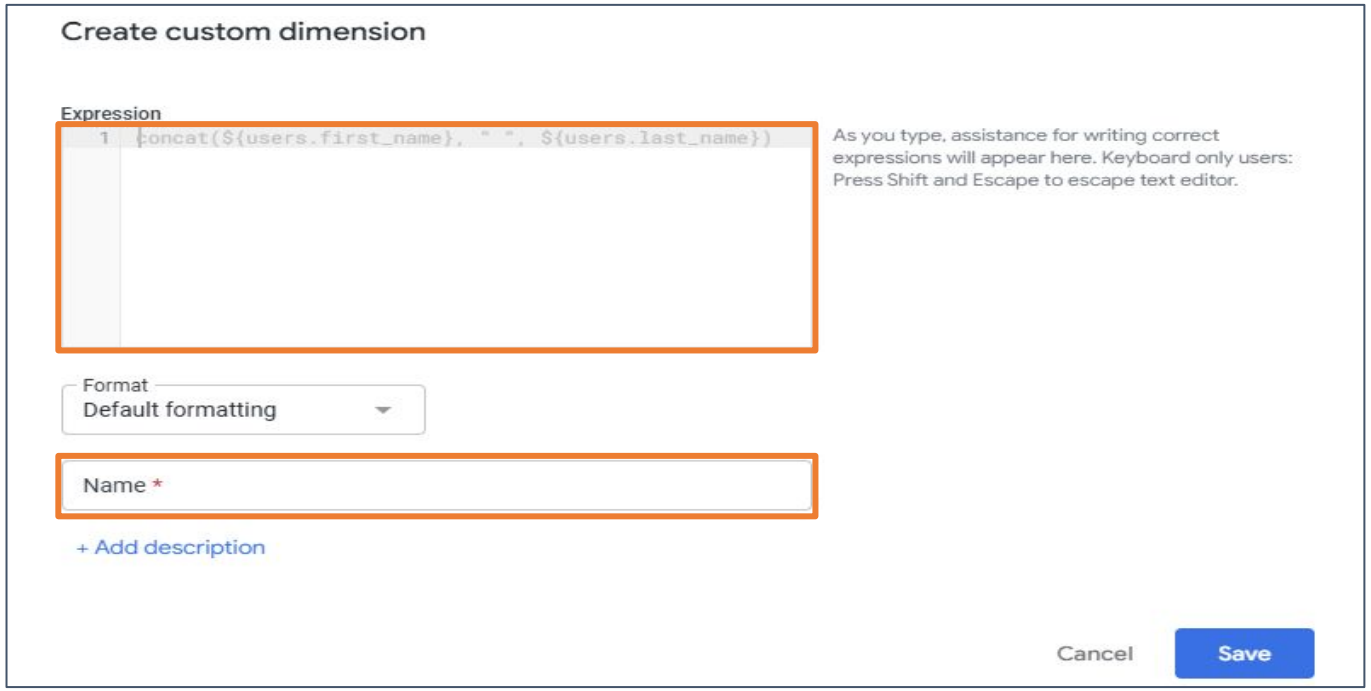
Step 2: Select “Custom Dimension”.

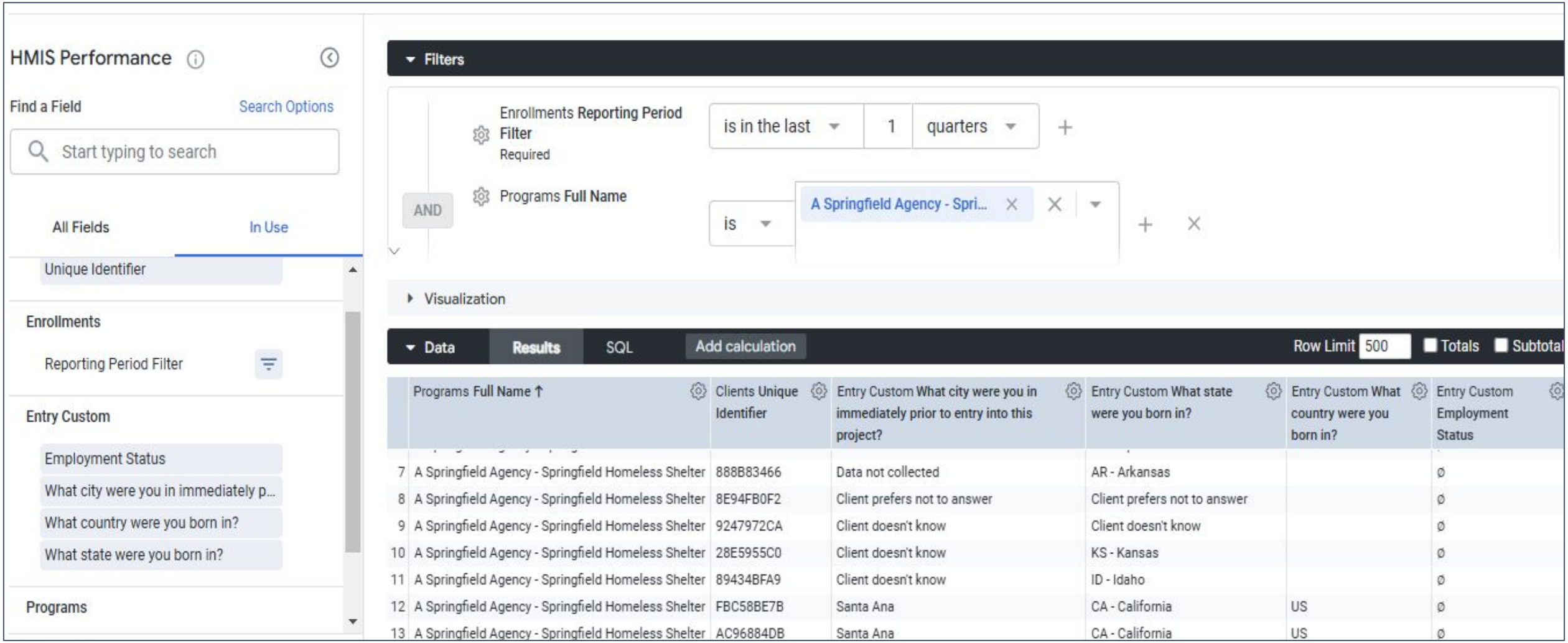


Creating Custom Dimensions

Step 3: Create a name for your dimension.

Step 4: Enter criteria in the “Expression” box.




HMIS Performance
Find a Field
Search Options
Start typing to search
All Fields
In Use
Unique Identifier
Enrollments
Reporting Period Filter
Entry Custom
Employment Status
What city were you in immediately p...
What country were you born in?
What state were you born in?
Programs
Filters
Enrollments Reporting Period Filter
Required
is in the last
1
quarters
AND
Programs Full Name
is
A Springfield Agency - Spri...
Visualization
Data
Results
SQL
Add calculation
Row Limit 500
Totals
Subtotal
Programs Full Name
Clients Unique Identifier
Entry Custom What city were you in immediately prior to entry into this project?
Entry Custom What state were you born in?
Entry Custom What country were you born in?
Entry Custom Employment Status
7 A Springfield Agency - Springfield Homeless Shelter 888B83466 Data not collected AR - Arkansas Ø
8 A Springfield Agency - Springfield Homeless Shelter 8E94FB0F2 Client prefers not to answer Client prefers not to answer Ø
9 A Springfield Agency - Springfield Homeless Shelter 9247972CA Client doesn't know Client doesn't know Ø
10 A Springfield Agency - Springfield Homeless Shelter 28E5955C0 Client doesn't know KS - Kansas Ø
11 A Springfield Agency - Springfield Homeless Shelter 89434BFA9 Client doesn't know ID - Idaho Ø
12 A Springfield Agency - Springfield Homeless Shelter FBC58BE7B Santa Ana CA - California US Ø
13 A Springfield Agency - Springfield Homeless Shelter AC96884DB Santa Ana CA - California US Ø

Custom Dimensions (Demo)

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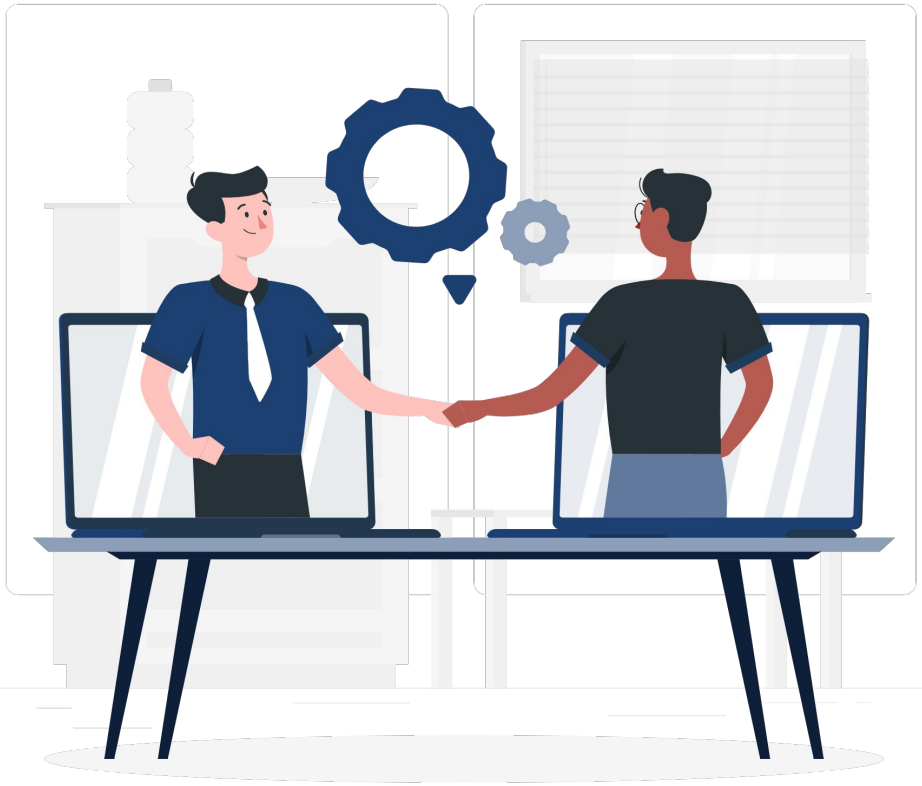
Custom Measures

Custom Measures

- Measures are aggregations of one or more existing dimension such as a count or average.
- You may create a custom measure based on an existing dimension.

* NOTE: These fields may only be used within the report you are creating.

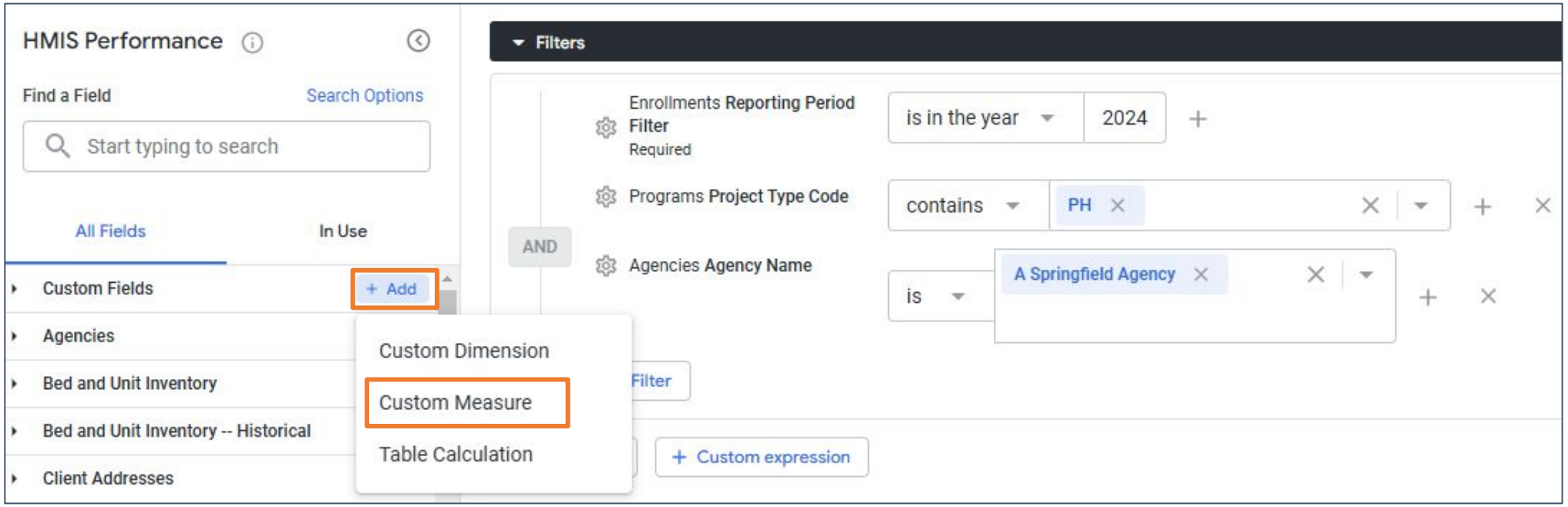


Graphic by: https://storyset.com/online

Creating Custom Measures

Step 1: Locate the “Custom Fields” view and click on the “+ Add” button to reveal the dropdown menu.

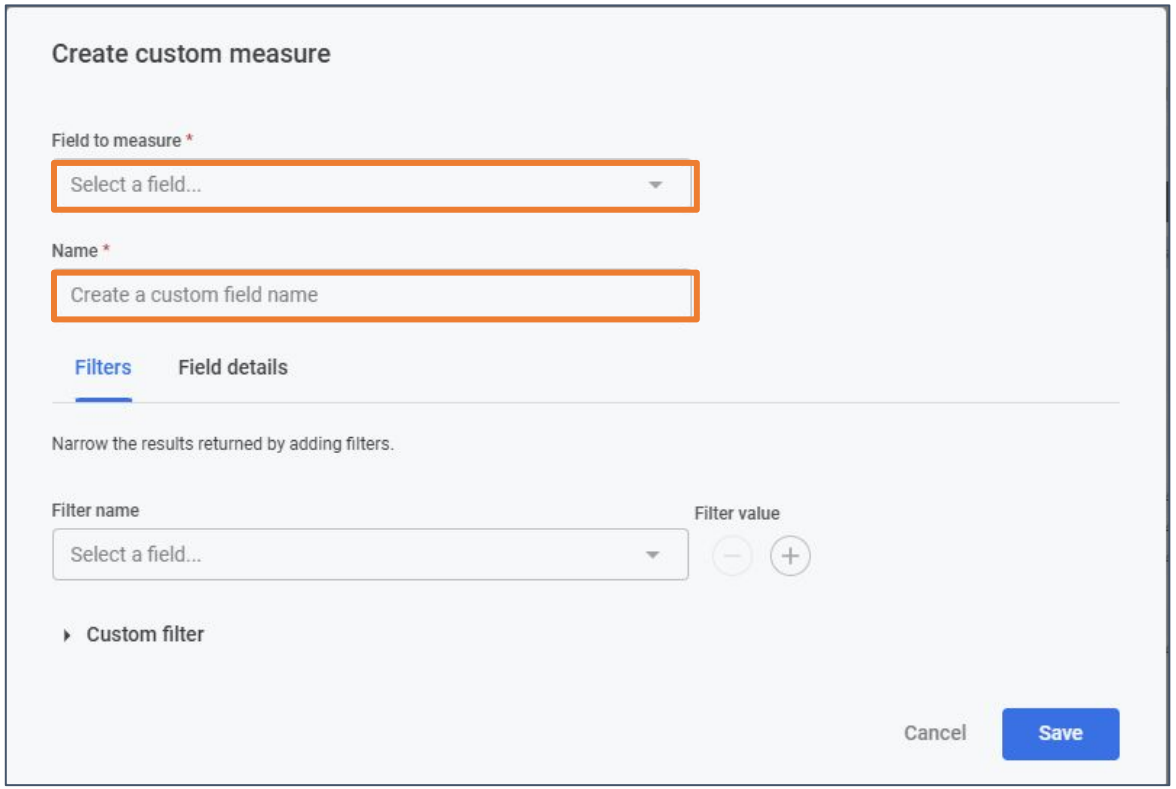
Step 2: Select “Custom Measure”.



Creating Custom Measures

Step 3: Create a name for your Measure in the “Name” box.

Step 4: Enter the field you wish to measure“Field to Measure” box.



Custom Measure (Demo)

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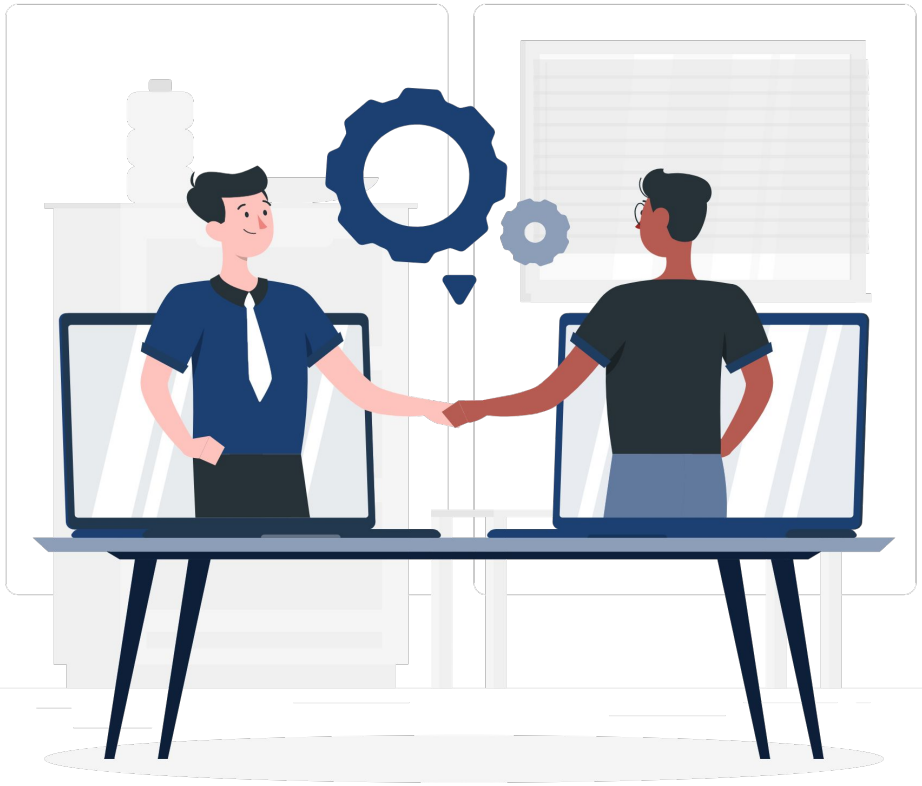
Table Calculations

Table Calculations

- Table Calculations calculate values based upon any custom or pre-defined numerical fields.
- Calculations are performed only on fields already existing in your Look.

* NOTE: These fields may only be used within the report you are creating.

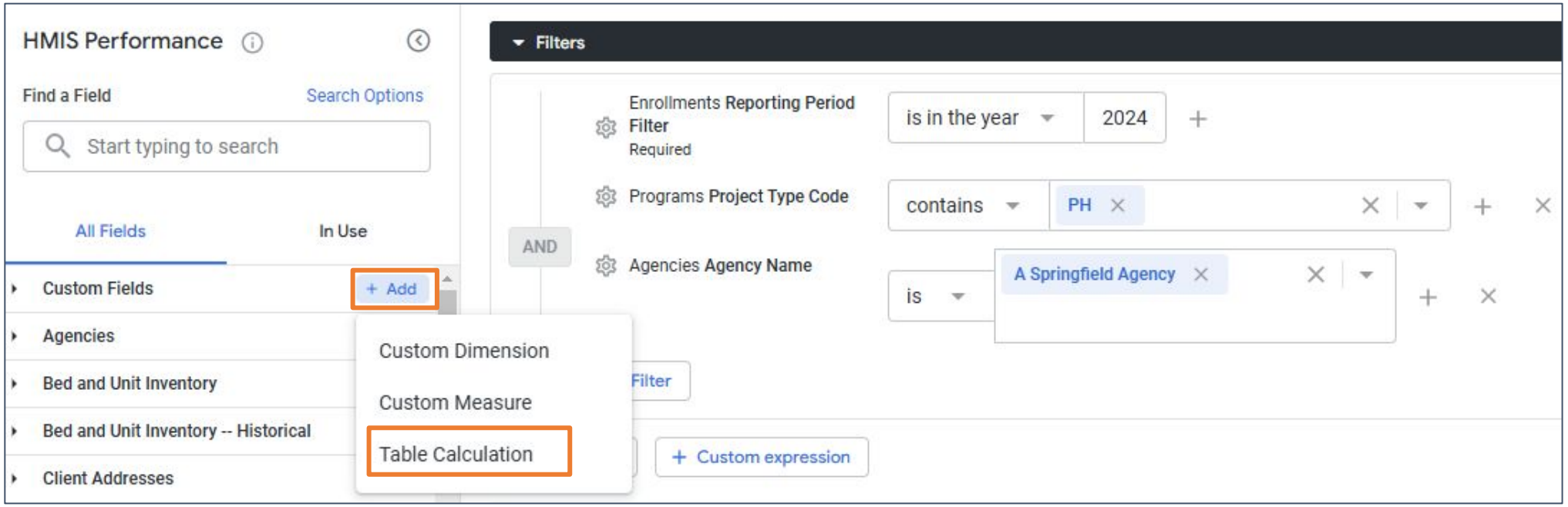


Graphic by: https://storyset.com/online

Creating Table Calculations

Step 1: Locate the “Custom Fields” view and click on the “+ Add” button to reveal the dropdown menu.

Step 2: Select “Table Calculation”.



Creating Table Calculations

Step 3: Create a name for your Table Calculation in the “Name” box.

Step 4: Looker provides several calculations to choose. Click the arrow in the “Calculation” box to see the different types.

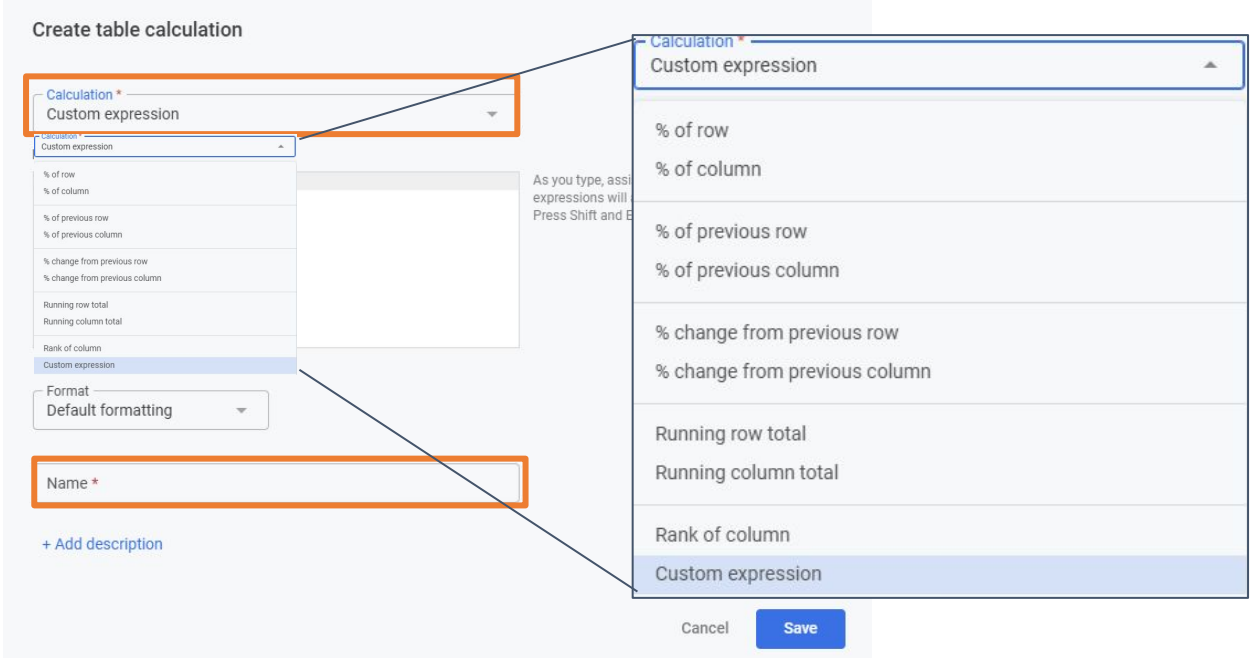


Table Calculations (Demo)

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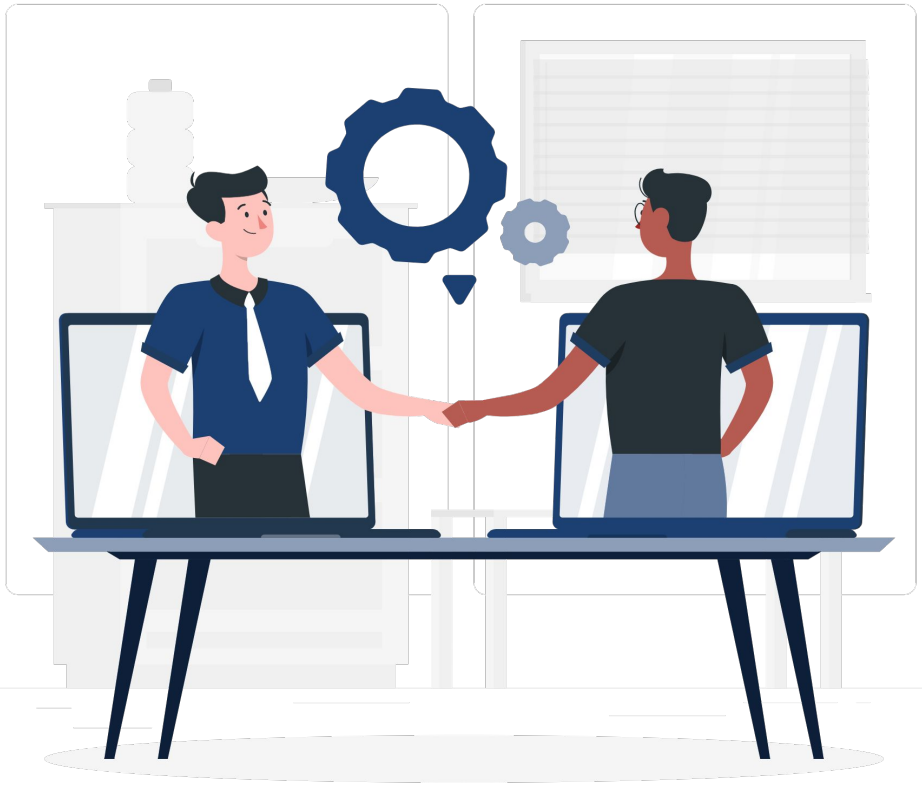
Visualizations

Visualizations

- Visualizations are charts and graphs that visually represent your data.
- Keep in mind that not all visualizations may work with the data in your Look.



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Creating Visualizations

Step 1: Click on the Visualization pane.

Step 2: Select the visualization from the selection on the black bar. Click the 3 dots for additional selections.

Step 3: Click “Edit” on the black bar to customize your visual.

Visualizations (Demo)

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Q&A

Reminder: Please enter your agency name and email in the chat box for attendance

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Thank you
Have a great day!

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Looker Best Practices for …

Creating Dashboards

- Keep Dashboards as simple as possible
- Apply filters to dashboards.
- Many small Dashboards are better than one giant Dashboard
- All dashboards must contain no more than 25 queries per dashboard.

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Looker Best Practices for ...

Creating Dashboards (continued)

- Don't use more than 3 merged queries
- Use pivots strategically, and avoid over-using pivots within dashboard tiles.
- Select the appropriate visualization type

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