ClientTrack®
by eccovia

Designer Toolset

Let Your Solution Grow with You

Form Designer

The Form Designer enables authorized administrators to create new or modify existing forms. Administrators have complete control over all elements and element properties, including the ability to review existing table structures, create unlimited tables and columns, and create entirely new normalized data structures.

Workflow Engine

Administrators can define and manage multi-step processes (e.g. program intake, plan creation). The engine guides users down different workflow paths, looping processes, and any number of business rules applied to data collection.

Query Designer

Query Designer allows authorized users to query any data from the ClientTrack database. Intended for users with a strong understanding of relational data and familiarity with basic SQL. Queries can be added to in-app reports, and can be integrated into workgroups and dashboards.

Dashboard Designer

Administrators can create common dashboards for end users. ClientTrack's entity-based dashboards can be displayed for a selected user, client, or other entity, including information resulting from custom queries. Dashboard elements may include any information needed to align with the unique needs of your organization.

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Workgroup Designer

The Workgroup Designer helps define what functions each user can access by role. Administrators can identify general functional categories of role-based access, including the identification of available menus, forms, and features.

Chart Designer

Chart configuration may occur during ad hoc analysis, or administrators may configure charts for display on forms or dashboards. Users can select data for display on each axis, add defined labels, change colors, and change chart types. Each chart can be rendered in stacked or 3D mode and include data legends as appropriate.

Eligibility Engine

Eligibility Engine allows administrators to edit and implement new eligibility rulesets to help determine a client's eligibility for different resources and services. This tool lets you create simple or complex eligibility rulesets and paths to eligibility, including creating rules that compare data against select criteria and stacked and nested rules within a path.

Rule Designer

Rule Designer is a comprehensive rules engine within the Form and Workflow Designer tools to enforce business rules that support data quality and common processes.

To learn more about how your organization can benefit from partnering with Eccovia, visit eccovia.com or call **888.449.6328** to speak with one of our experienced solution experts.

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