HMIS Guides

APR STEP BY STEP GUIDE

July 2020

A step by step guide to running and downloading your APR

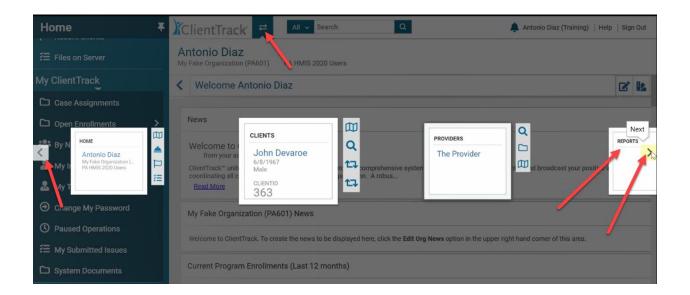
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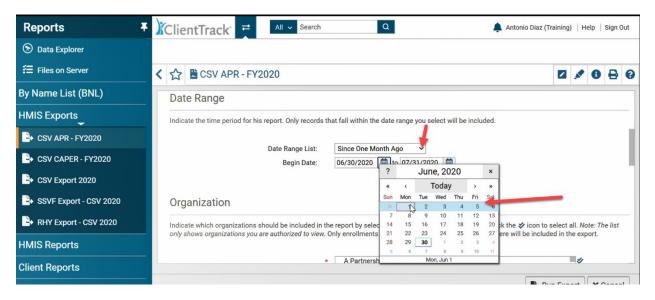
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APR Report Guide Step by Step

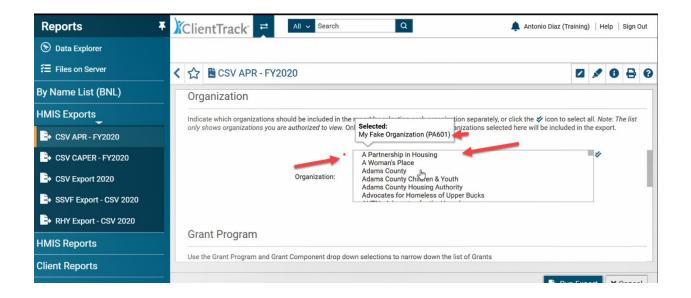
- 1. Log into our Client Track.19 HMIS using the email that you supplied on your user agreement and your password.
- 2. Once you are logged into HMIS look at the top left side and see the menu. If the heading on the menu says anything other than Reports you will click the flag next to the search box that has two arrows each going a different direction.
- 3. By clicking on the flag, you will open the carousel. To navigate the carousel use the left and right arrows at each extreme left and right ends of the screen. Navigate to the active work space box that says Reports.



- 4. After you have opened the Reports workspace you will look to your menu on the left and select HMIS Exports. The HMIS Exports menu will open you will select the file CSV APR FY2020.
- 5. Select the Date Range by either choosing the from the dropdown menu or opening the calendar and selecting the desired range.



6. The next step is organization choice. HMIS will automatically populate the organization that you are logged into. By hovering over the organization box the selected organizations will pop up. If the organization is the one that you want to run the report for then you don't need to do anything. Organization is a mandatory field and must be populated to run the report.



7. The next four sections are non – mandatory fields and it's recommended that you leave them at SELECT unless you are certain of the selection. A faulty selection can result in an unsuccessful APR.

7a. Grant Program – This dropdown menu allows you to choose the Grant Program the program that your APR is being run on belongs to.

7b. Grant Component – This dropdown allows you to select the Grant Component (section of the Grant Program) that the program your running the APR belongs to.

7c. Filter By Grant – By checking this box a dropdown menu will appear and allow you to select the grant or grants that you are running the APR on.

Reports 	ClientTrack 🛒 🗚 search Q Antonio Diaz	(Training) Help Sign Out
🛞 Data Explorer		
E Files on Server	< ☆ CSV APR - FY2020	2 / 8 🔒 0
By Name List (BNL)	Use the Grant Program and Grant Component drop down selections to narrow down the list of Grants	
HMIS Exports		
CSV APR - FY2020	Grant Program: - SELECT	
SV CAPER - FY2020		
CSV Export 2020	Grant(s)	
SSVF Export - CSV 2020	This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the grant separately, or click the 🛠 icon to select all. Use the Grants filter to narrow down the list of projects for your report.	report by selecting each
RHY Export - CSV 2020		
HMIS Reports	Grant(s): Filter by Grant(s)	
Client Reports		
SSVF Export - CSV 2020 RHY Export - CSV 2020 HMIS Reports	This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the grant separately, or click the 🛠 icon to select all. Use the Grants filter to narrow down the list of projects for your report.	report by selecting each

7d. Filter By Program Component - This dropdown allows you to select which program component the program your running your APR on is a part of.

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🔊 Data Explorer						
E Files on Server				0	8	0
By Name List (BNL)						٦
HMIS Exports	Program					
SV APR - FY2020	A list of programs based on the grant selected.					-
SV CAPER - FY2020						
CSV Export 2020	Program Type: Filter by Program Type					
SSVF Export - CSV 2020	✓My Fake Organization Permanent Housing (PSH-601) My Fake Organization PHY BCP (FS-601)					
RHY Export - CSV 2020	Program: My Fake Organization RHY Outreach (SO-601) My Fake Organization Transitional Housing (TH-601)					
HMIS Reports	My Fake Organization VA SSVF Prevention (SSVF-601) My Fake Organization VA SSVF RRH (SSVF-601)					4
Client Reports						
HMIS Reports	My Fake Organization KnY outreach (SO-601) My Fake Organization Transitional Housing (TH-601) My Fake Organization VA SSVF Prevention (SSVF-601)			¥ 0.		

8. Filter By Program is a mandatory. After checking the Filter by Program box, the dropdown will appear of available programs. When you select a program, a check will appear next to your program choice.

Once you get to this point you can run the APR by selecting Run Export. It is recommended but not required that before hitting Run Export you select the box for Validation File. What this will do is generate a second file that will provide details on your APR.

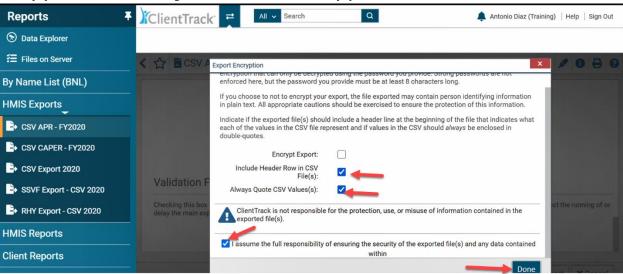
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E Files on Server	< 🏠 🖺 CSV APR - FY2020			0	8	0
By Name List (BNL)	* V Filter by Program					٦
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SV APR - FY2020	My Fake Organization RHY Outreach (SO-601) My Fake Organization Transitional Housing (TH-601)					
-> CSV CAPER - FY2020	My Fake Organization VA SSVF Prevention (SSVF-601) My Fake Organization VA SSVF RRH (SSVF-601)					
CSV Export 2020						
SSVF Export - CSV 2020	Validation File					
RHY Export - CSV 2020	Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will no delay the main export.	t affect	t the r	unning	ofo	r.
HMIS Reports	Generate Validation File:					I
Client Reports						

9. Now that you have checked the Generate Validation File box you are ready to click Run Export.

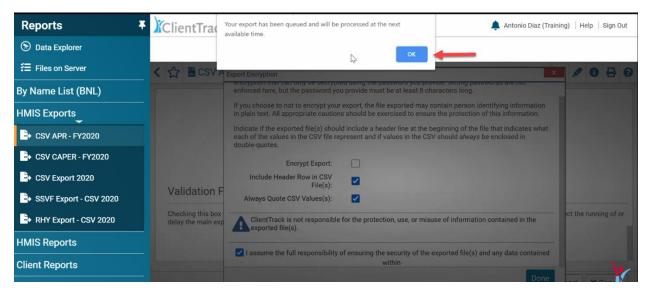
10. The next box that will pop up is the Export Encryption box. This box is going to ask you to create a password for the file. When you download files of this type they have to be extracted before uploading them into SAGE. If you are planning on emailing your APR files to another person you will need to encrypt the export. Before clicking done make sure that both the "include header Row in CSV File(s)" and the "Always Quote CSV Value(s)" boxes are checked.

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🛞 Data Explorer		
₩ Files on Server	く 合 圏 CSV A Export Encryption	× 1 0 8 0
By Name List (BNL)	If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryp that can only be decrypted using the password you provide. Strong passwords are not enforced here, b	
HMIS Exports	the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying informatio	n in
CSV APR - FY2020	plain text. All appropriate cautions should be exercised to ensure the protection of this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates wh	at
- CSV CAPER - FY2020	each of the values in the CSV file represent and if values in the CSV should always be enclosed in doub quotes.	
- CSV Export 2020	Encrypt Export:	
SSVF Export - CSV 2020	Validation F Password: *	and the second
RHY Export - CSV 2020	Checking this box delay the main exc File(s):	ct the running of or
HMIS Reports	Always Quote CSV Values(s):	
Client Reports		ne

11. When the Export Encryption box appears, you can choose not to encrypt the files by unselecting the Encrypt Export box. By deselecting this box, you will not have to provide a password, but you will need to check the box that asks you to accept responsibility for the files. As with an encrypted export be sure that the" include header Row in CSV File(s)" and the "Always Quote CSV Value(s)" boxes are checked.



12. Once you hit the done button a new box will appear. This box is will states that the APR has been queued and will be processed at the next available time. Click okay on this box and the next box will load.



13. The next box that will be queued up after you hit OK is the Files on Server Page. This page holds all the files that you have exported from the server. Only the files that are completely exported will show on this page. To return to this page at a later date you can find it listed in the left-hand menu of the Reports workspace. In the upper left side of the Files on Server page it will say in underlined in blue Click to view.

Reports	Client	Track 🗧	All 🗸 Search	Q		🌲 Antonio Diaz (Tra	aining) Help Sign Out
🟵 Data Explorer							
⅔ Files on Server	Files on Serve						
By Name List (BNL)	on the date	specified. To downlo	les available for you to downlo ad the file click the download ser or be available for process	link, to remove the file from	m file on server		
HMIS Exports	Click to view	<u>v</u> the status of export	t or import tasks.				
CSV APR - FY2020		File Name			Creator	Created	Expires
CSV CAPER - FY2020	🖌 🔁	HMIS APR_CAPER 2	2020 Validation_2020080100	0515_TaskID_197706.zip	Antonio Diaz	8/1/2020 12:05:15 AM	7/31/2021 7:05:15 PM
CSV CAPER - FY2020	🔊 ×	HMIS APR 2020 Exp	port_20200801000508_Taskl	D_197705.zip	Antonio Diaz	8/1/2020 12:05:08 AM	7/31/2021 7:05:08 PM
SSVF Export - CSV 2020	🖌 🚑	HMIS APR_CAPER 2	2020 Pre-Load_20200731235	500_TaskID_197704.zip	Antonio Diaz	7/31/2020 11:55:00 PM	7/31/2021 6:55:00 PM
RHY Export - CSV 2020	💫 ×	HMIS APR_CAPER 2	2020 Validation_2020073123	3510_TaskID_197703.zip	Antonio Diaz	7/31/2020 11:35:10 PM	7/31/2021 6:35:10 PM
HMIS Reports	💫 ×	HMIS APR 2020 Exp	port_20200731233503_Taskl	D_197702.zip	Antonio Diaz	7/31/2020 11:35:03 PM	7/31/2021 6:35:03 PM
Client Reports	- 🍋 ×	HMIS APR_CAPER 2	2020 Validation_2020073121	0512_TaskID_197699.zip	Antonio Diaz	7/31/2020 9:05:12 PM	7/31/2021 4:05:12 PM
	×	HMIS APR 2020 Exp	port_20200731210504_Taskl	D_197698.zip	Antonio Diaz	7/31/2020 9:05:04 PM	7/31/2021 4:05:04 PM

14. By selecting the Click to view you will open the Tasks page that tracks how your export is progressing. This page will update every 30 seconds, or you can hit the Refresh Now button and it will update. You can select the box to show only your tasks and only your tasks will appear. This page also will tell you if your task has started or is in progress and it will show the files in the queue.

Reports	Task List					x	Training) Help Sign Out
🛞 Data Explorer	Q Asynchronous Tasks	E	2 💉	8	8	0	
₩ Files on Server	Below is a listing of tasks that are either queued to be completed or that have task detail, click the view details folder to the left of the task. To view a log of or error, click view log. It's important to note that it a task begins its execution	f the task execution, upon	task prod	cessing, co	ompletion		e automatically removed,
By Name List (BNL)	load.	Tat the next available this		Toverall	system	_	file will no longer be
HMIS Exports			+ Ne	ew Sched	luled Tas	k	
CSV APR - FY2020	Show only my tasks:						Expires
CSV CAPER - FY2020	Refreshing in 23 seconds 🕕 😨 Refresh Now	•		1			7/31/2021 7:05:15 PM
	Displaying 1-200 of 4,295 i	results. Next Last		L			7/31/2021 7:05:08 PM
CSV Export 2020	Task Name 📥 🚺	esired Start End Time	Sta	tus 🔺	Tas	kID •	M 7/31/2021 6:35:10 PM
SSVF Export - CSV 20	MIS APR/CAPER 2020 Validation 0	7/31/2020 37PM	Not	Started	1977	'09	M 7/31/2021 6:35:03 PM
RHY Export - CSV 202		7/31/2020	Not	Started	1977	08	
HMIS Reports		37PM	110	otarteu	1577		7/31/2021 4:05:12 PM
Client Reports		7/31/2020 07/31/202 31PM 7:35PM		npleted cessfully	1977	'07	7/31/2021 4:05:04 PM
							7/31/2021 3-55-00 PM

15. If you have chosen to Generate a Validation file (recommended) you will have three downloads. If you chose not to run the Validation file you will have two downloads. The Export file will always run and is what you will load into SAGE. The other file that runs every time is the Pre-Load file and is useless to the user of Client Track. The Pre-Load file is a file that helps the Export file load onto the server and you can delete this after all your files appear on the Files on Server page. The third file only runs when you check the box to generate a Validation file. The Validation file is a details file for your report.

Reports	ClientTrack 🗮 🗚 🔍 Search 🔍	🌲 Antonio Diaz (Training) Help Sign Out
🛞 Data Explorer		
E Files on Server	HMIS APR_CAPER 2020 Pre-Load_20200731205500_TaskID_197697.zip Antonio Diaz	z 7/31/2020 8:55:00 PM 7/31/2021 3:55:00 PM
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HMIS Exports_		
SV APR - FY2020		z 7/31/2020 7:34:58 PM 7/31/2021 2:34:58 PM
CSV CAPER - FY2020	HMIS APR_CAPER 2020 Pre-Load_20200731192500_TaskID_197694.zip Antonio Diaz	
	HMIS APR_CAPER 2020 Validation_20200731191507_TaskID_197693.zip Antonio Diaz	z 7/31/2020 7:15:07 PM 7/31/2021 2:15:07 PM
SSVF Export - CSV 2020	HMIS APR 2020 Export_20200731191459_TaskID_197692.zip Antonio Diaz	z 7/31/2020 7:14:59 PM 7/31/2021 2:14:59 PM
RHY Export - CSV 2020	HMIS APR_CAPER 2020 Validation_20200731175518_TaskID_197687.zip Antonio Diaz	z 7/31/2020 5:55:18 PM 7/31/2021 12:55:18 PM
HMIS Reports	Antonio Diaz	z 7/31/2020 5:55:09 PM 7/31/2021 12:55:09 PM
Client Reports	HMIS APR_CAPER 2020 Validation_20200730115038_TaskID_197571.zip Antonio Diaz	z 7/30/2020 11:50:38 AM 7/30/2021 6:50:38 AM
	HMIS APR 2020 Export_20200730115029_TaskID_197570.zip Antonio Diaz	z 7/30/2020 11:50:29 AM 7/30/2021 6:50:29 AM

- 16. When you look at the Files on Server page you will see the paper with the green arrow, clicking on this will download your APR. Next to it is a blue X, clicking on this X will delete the file. Three keywords to look for are Pre-Load, Validation, and Export. These keywords will tell you which part of the APR you are downloading. Remember that the Pre-Load does not get downloaded. The Export is the file that gets uploaded into SAGE. The Validation file is a details file that will help you find errors in your APR and should be downloaded and used for troubleshooting.
- 17. After you click on the white paper with green arrow and your APR has downloaded and you see the folder with a zipper. By clicking on the arrow next to the file you will be prompted to choose between Open, Always open files of this type, Show in folder, and Cancel. If you want to view your APR you can choose to open it. Using the Always open files of this type option will tell Client Track to always open the APR files that are downloaded. The Show in folder function will place the APR on your computer, always write down where your file is placed. Cancel will stop the process and end the download. This is the last step in the process of running and downloading your APR. Once the file is on your computer you are ready to upload it into SAGE.

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HMIS Exports	2	HMIS APR 2020	Export_20200731191459	_TaskID_197692.zip	Antonio Diaz	7/31/2020 7:14:59 PM	7/31/2021 2:14:59 PM
HMIS Reports	2	X HMIS APR_CAP	ER 2020 Validation_20200)731175518_TaskID_197687.zij	p Antonio Diaz	7/31/2020 5:55:18 PM	7/31/2021 12:55:18 PM
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Enrollment Reports	2	HMIS APR_CAP	ER 2020 Validation_20200	0730115038_TaskID_197571.zij	p Antonio Diaz	7/30/2020 11:50:38 AM	7/30/2021 6:50:38 AM
Referral Reports	2	HMIS APR 2020	Export_20200730115029	_TaskID_197570.zip	Antonio Diaz	7/30/2020 11:50:29 AM	7/30/2021 6:50:29 AM
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