



HMIS Guides

APR STEP BY STEP GUIDE

July 2020

A step by step guide to running and downloading your APR

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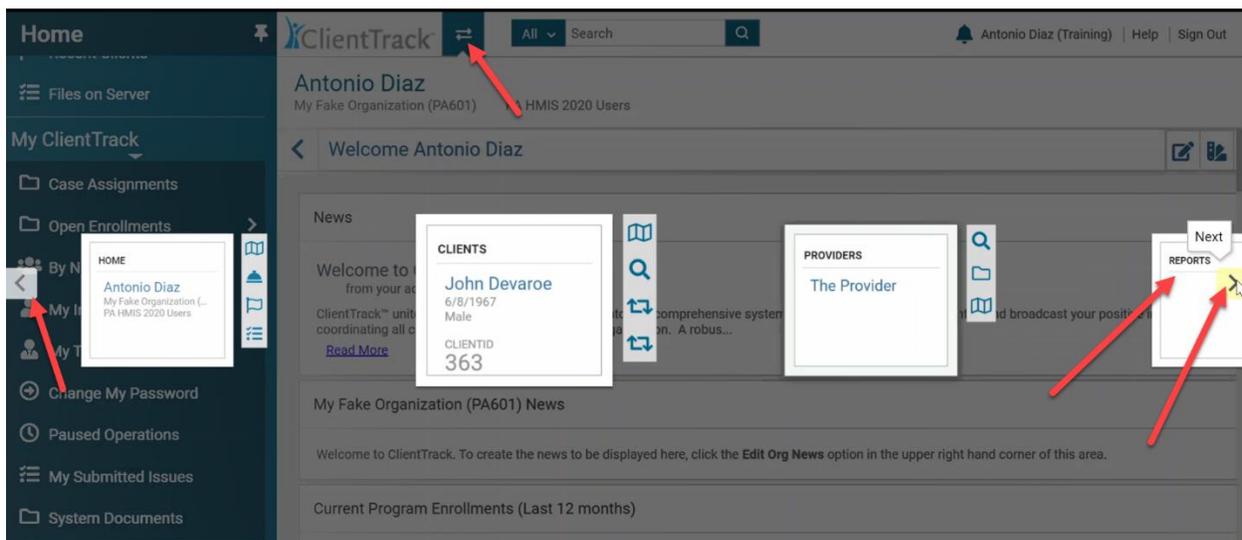
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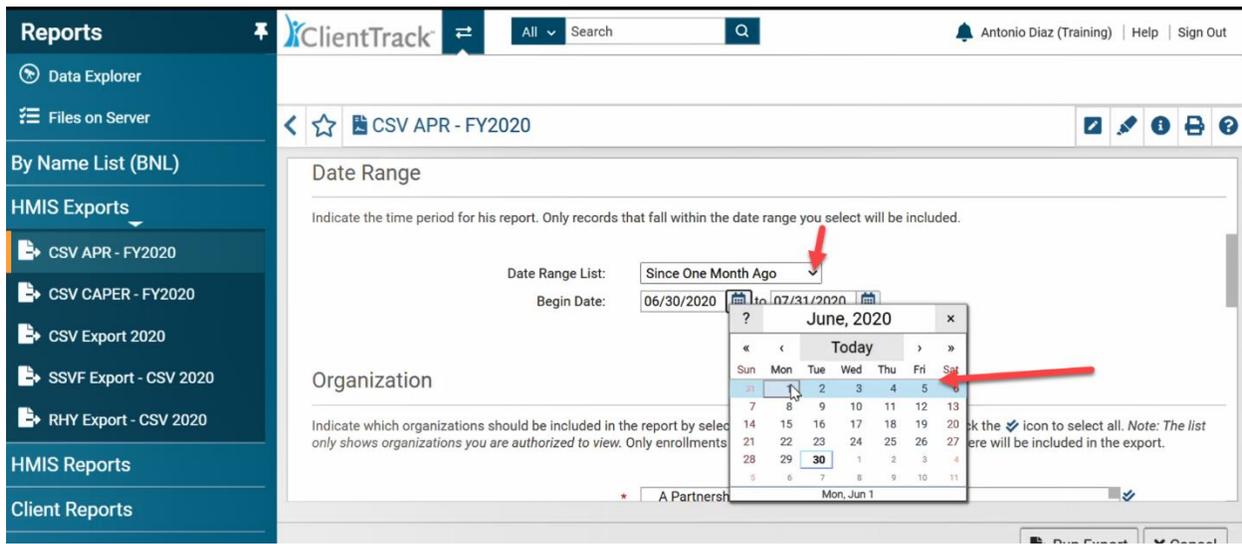
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APR Report Guide Step by Step

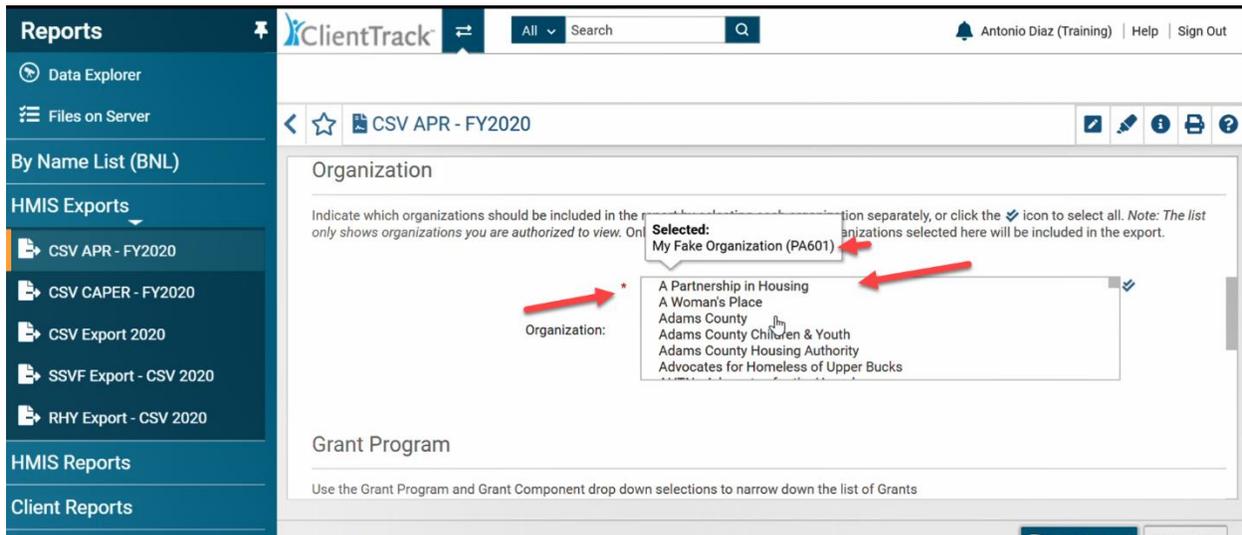
1. Log into our Client Track.19 HMIS using the email that you supplied on your user agreement and your password.
2. Once you are logged into HMIS look at the top left side and see the menu. If the heading on the menu says anything other than Reports you will click the flag next to the search box that 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.

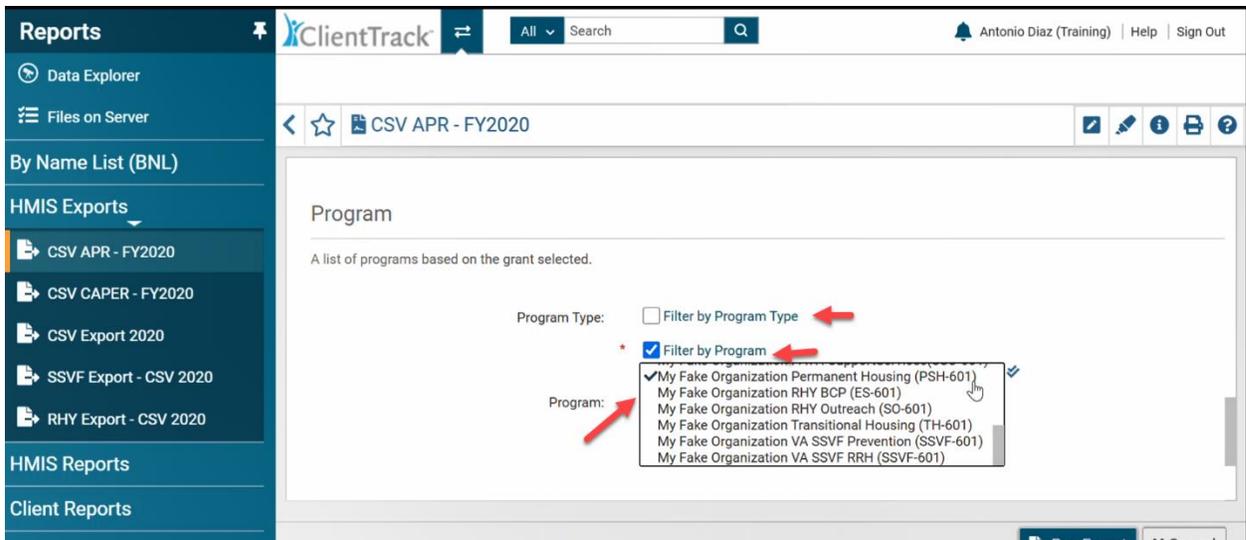
7a. Grant Program – This dropdown menu allows you to choose the Grant Program the program that your APR is being run on belongs to.

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.

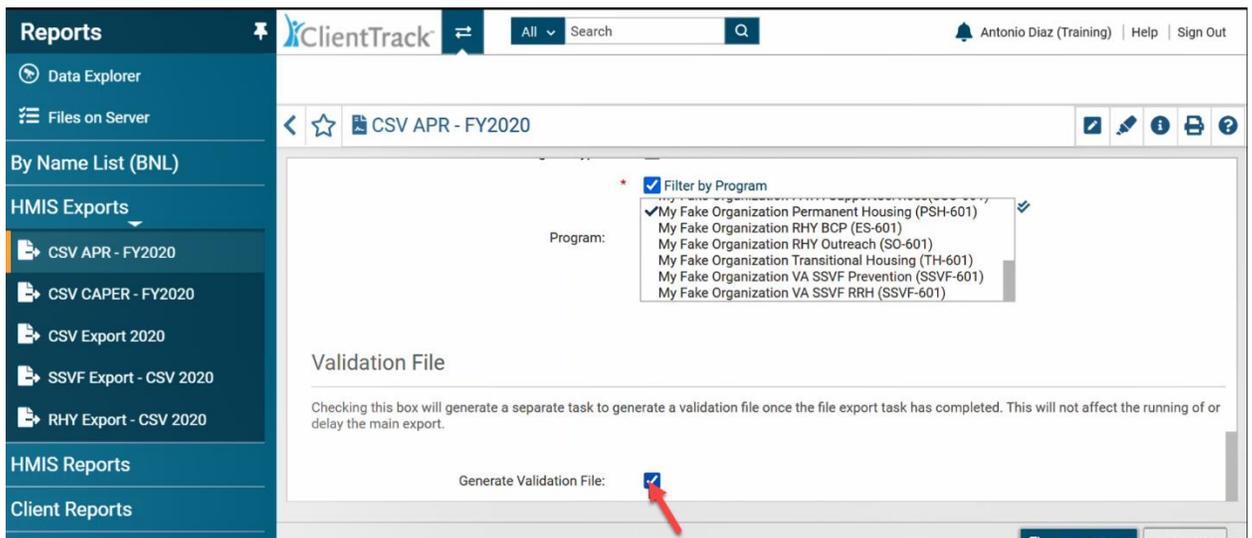
The screenshot shows the ClientTrack interface for configuring a report. The sidebar on the left contains navigation options: Reports, Data Explorer, Files on Server, By Name List (BNL), HMIS Exports (with sub-items like CSV APR - FY2020, CSV CAPER - FY2020, CSV Export 2020, SSVF Export - CSV 2020, RHY Export - CSV 2020), HMIS Reports, and Client Reports. The main content area is titled 'CSV APR - FY2020' and includes a search bar and user information (Antonio Diaz (Training) | Help | Sign Out). Below the title, there are two dropdown menus: 'Grant Program: -- SELECT --' and 'Grant Component: -- SELECT --'. Below these is a section for 'Grant(s)' with a checkbox labeled 'Filter by Grant(s)'. Red arrows point to the dropdown menus and the checkbox.

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.



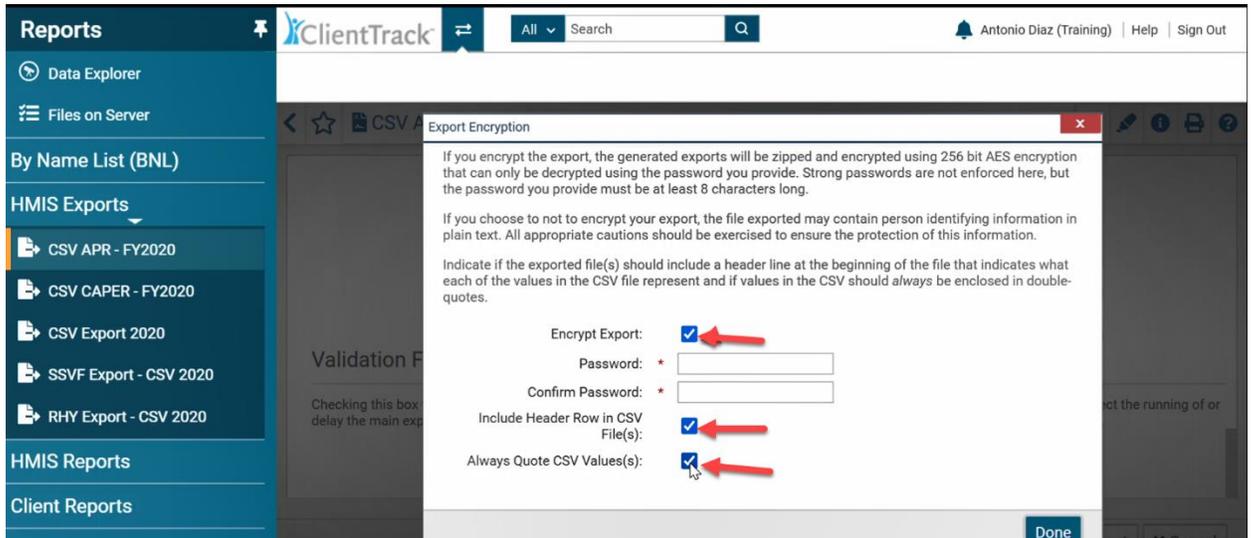
8. Filter By Program is a mandatory. After checking the Filter by Program box, the dropdown will appear of available programs. When you select a program, a check will appear next to your program choice.

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.

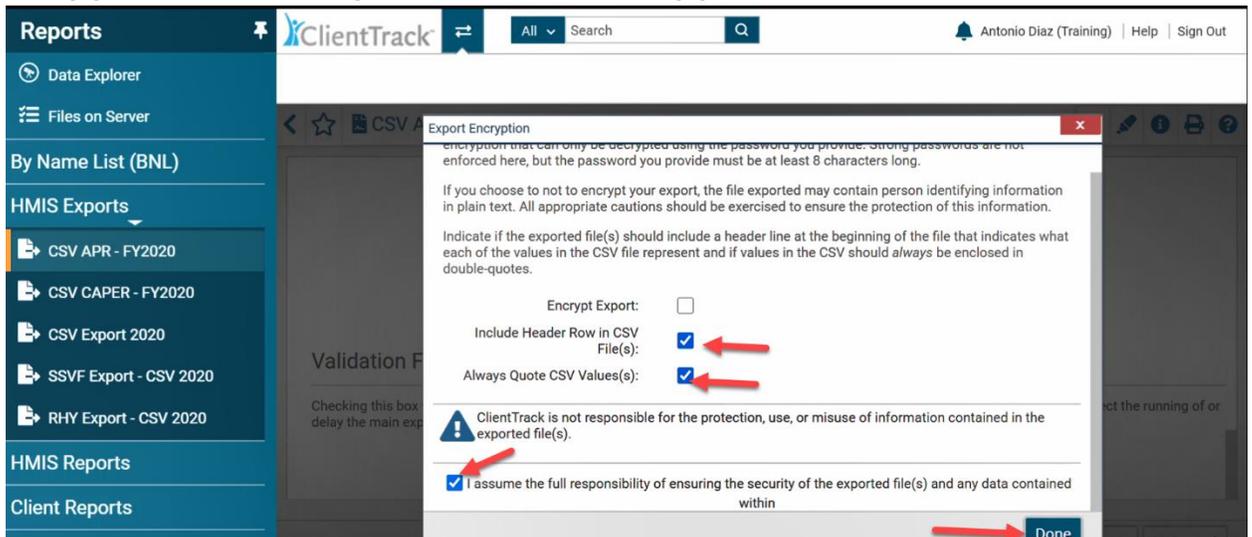


9. Now that you have checked the Generate Validation File box you are ready to click Run Export.

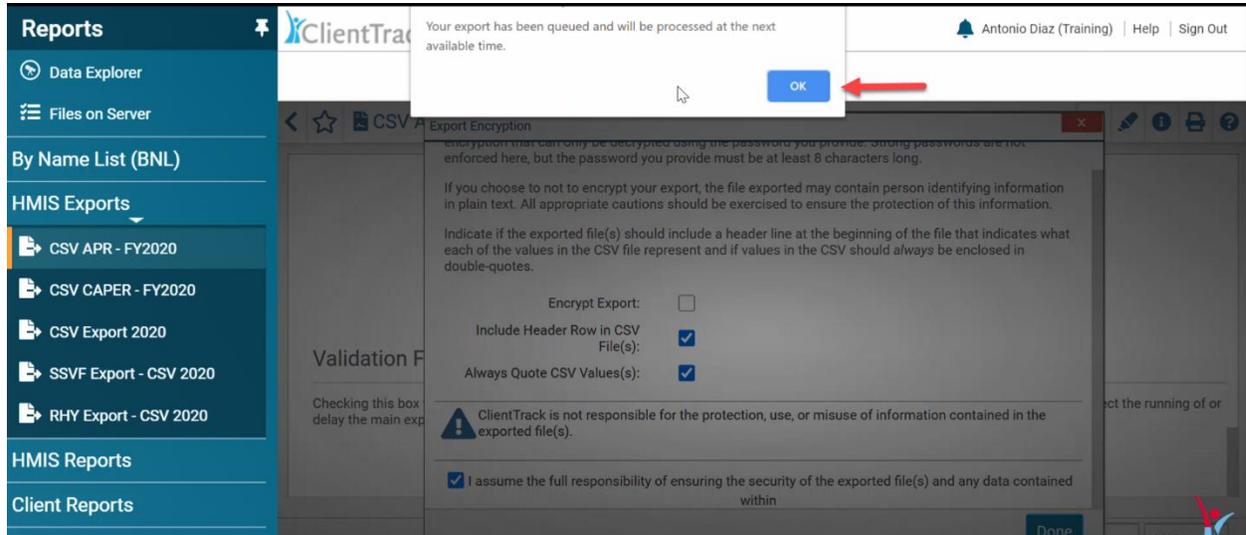
10. The next box that will pop up is the Export Encryption box. This box is going to ask you to create a password for the file. When you download files of this type they have to be extracted before uploading them into SAGE. If you are planning on emailing your APR files to another person you will need 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.



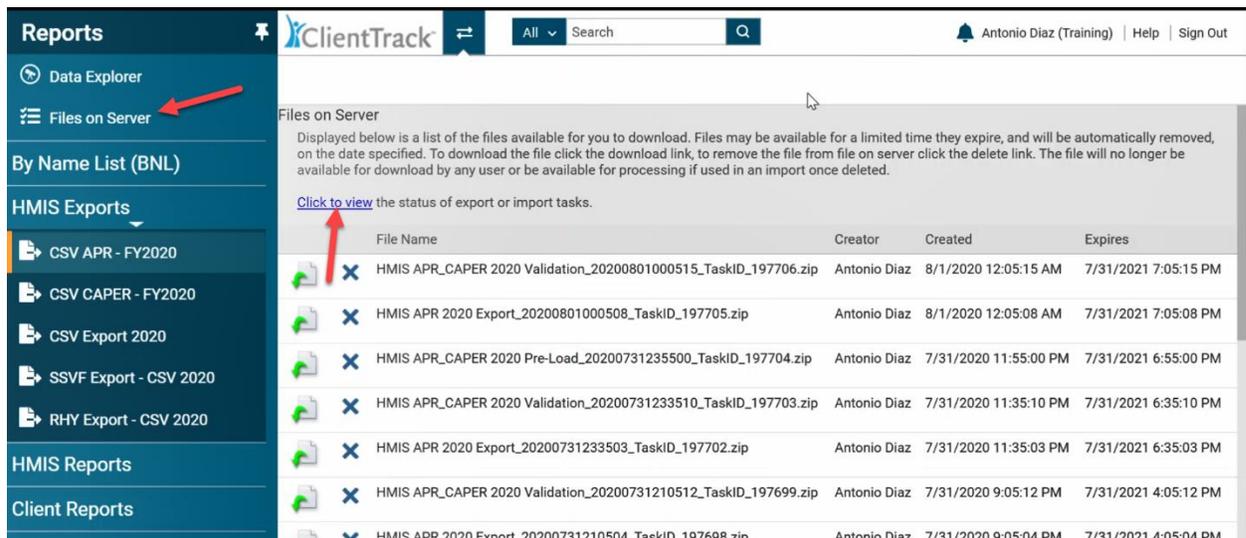
11. When the Export Encryption box appears, you can choose not to encrypt the files by unselecting the Encrypt Export box. By deselecting this box, you will not have to provide a password, but you will need to check the box that asks you to accept responsibility for the files. As with an encrypted export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



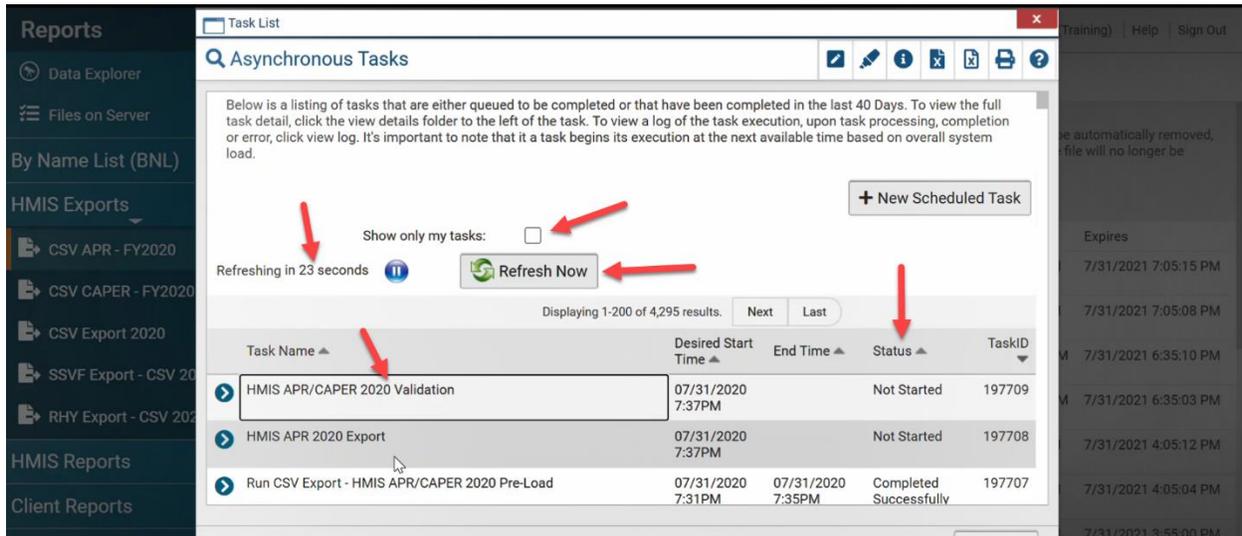
12. Once you hit the done button a new box will appear. This box is will states that the APR has been queued and will be processed at the next available time. Click okay on this box and the next box will load.



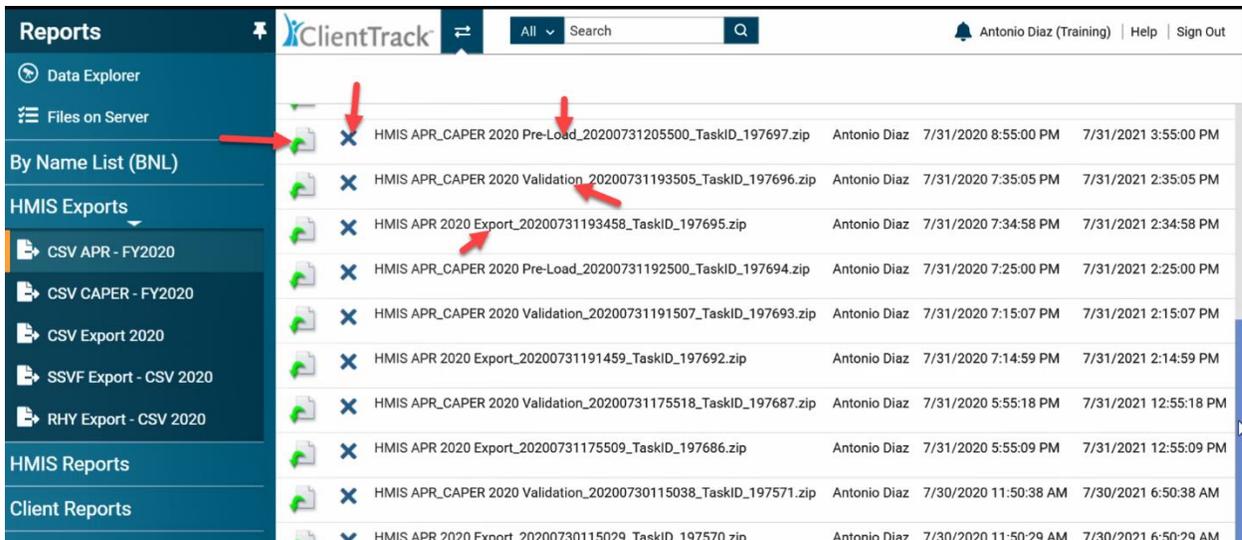
13. The next box that will be queued up after you hit OK is the Files on Server Page. This page holds all the files that you have exported from the server. Only the files that are completely exported will show on this page. To return to this page at a later date you can find it listed in the left-hand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



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.



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.



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.

usw.clienttrack.net/19/MainPage.aspx?Inline=true

ClientTrack

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Reports

- Data Explorer
- Files on Server
- By Name List (BNL)
 - HMIS Active Client List
 - HMIS Veterans By Name List Veterans
- HMIS Exports
- HMIS Reports
- Client Reports
- Enrollment Reports
- Referral Reports

HMIS APR_CAPER 2020 Validation_20200731193505_TaskID_197696.zip	Antonio Diaz	7/31/2020 7:35:05 PM	7/31/2021 2:35:05 PM
HMIS APR 2020 Export_20200731193458_TaskID_197695.zip	Antonio Diaz	7/31/2020 7:34:58 PM	7/31/2021 2:34:58 PM
HMIS APR_CAPER 2020 Pre-Load_20200731192500_TaskID_197694.zip	Antonio Diaz	7/31/2020 7:25:00 PM	7/31/2021 2:25:00 PM
HMIS APR_CAPER 2020 Validation_20200731191507_TaskID_197693.zip	Antonio Diaz	7/31/2020 7:15:07 PM	7/31/2021 2:15:07 PM
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 APR_CAPER 2020 Validation_20200731175518_TaskID_197687.zip	Antonio Diaz	7/31/2020 5:55:18 PM	7/31/2021 12:55:18 PM
HMIS APR 2020 Export_20200731175509_TaskID_197686.zip	Antonio Diaz	7/31/2020 5:55:09 PM	7/31/2021 12:55:09 PM
HMIS APR_CAPER 2020 Validation_20200730115038_TaskID_197571.zip	Antonio Diaz	7/30/2020 11:50:38 AM	7/30/2021 6:50:38 AM
HMIS APR 2020 Export_20200730115029_TaskID_197570.zip	Antonio Diaz	7/30/2020 11:50:29 AM	7/30/2021 6:50:29 AM

HMIS APR 2020 Ex...zip

Show all



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Reports

- Data Explorer
- Files on Server
- By Name List (BNL)
- HMIS Exports
 - CSV APR - FY2020
 - CSV CAPER - FY2020
 - CSV Export 2020
 - SSVF Export - CSV 2020
 - RHY Export - CSV 2020
- HMIS Reports
- Client Reports

HMIS APR_CAPER 2020 Validation_20200731193505_TaskID_197696.zip	Antonio Diaz	7/31/2020 7:35:05 PM	7/31/2021 2:35:05 PM
HMIS APR 2020 Export_20200731193458_TaskID_197695.zip	Antonio Diaz	7/31/2020 7:34:58 PM	7/31/2021 2:34:58 PM
HMIS APR_CAPER 2020 Pre-Load_20200731192500_TaskID_197694.zip	Antonio Diaz	7/31/2020 7:25:00 PM	7/31/2021 2:25:00 PM
HMIS APR_CAPER 2020 Validation_20200731191507_TaskID_197693.zip	Antonio Diaz	7/31/2020 7:15:07 PM	7/31/2021 2:15:07 PM
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 APR_CAPER 2020 Validation_20200731175518_TaskID_197687.zip	Antonio Diaz	7/31/2020 5:55:18 PM	7/31/2021 12:55:18 PM
HMIS APR 2020 Export_20200731175509_TaskID_197686.zip	Antonio Diaz	7/31/2020 5:55:09 PM	7/31/2021 12:55:09 PM
HMIS APR_CAPER 2020 Validation_20200730115038_TaskID_197571.zip	Antonio Diaz	7/30/2020 11:50:38 AM	7/30/2021 6:50:38 AM
HMIS APR 2020 Export_20200730115029_TaskID_197570.zip	Antonio Diaz	7/30/2020 11:50:29 AM	7/30/2021 6:50:29 AM

Open

Always open files of this type

Show in folder

Cancel

