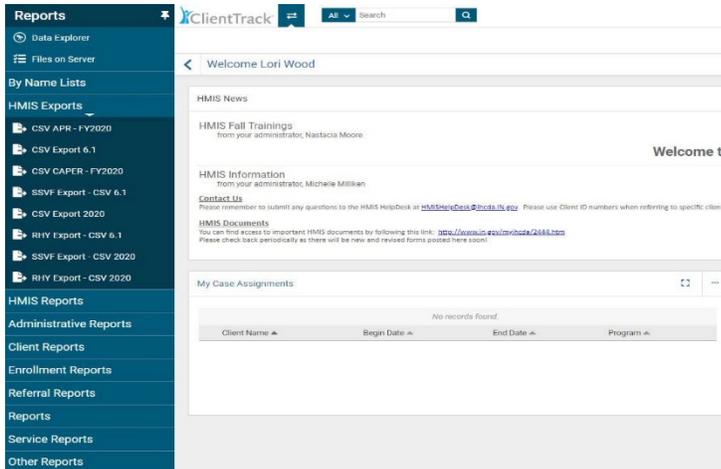


How to Export the Annual Performance Report (APR)

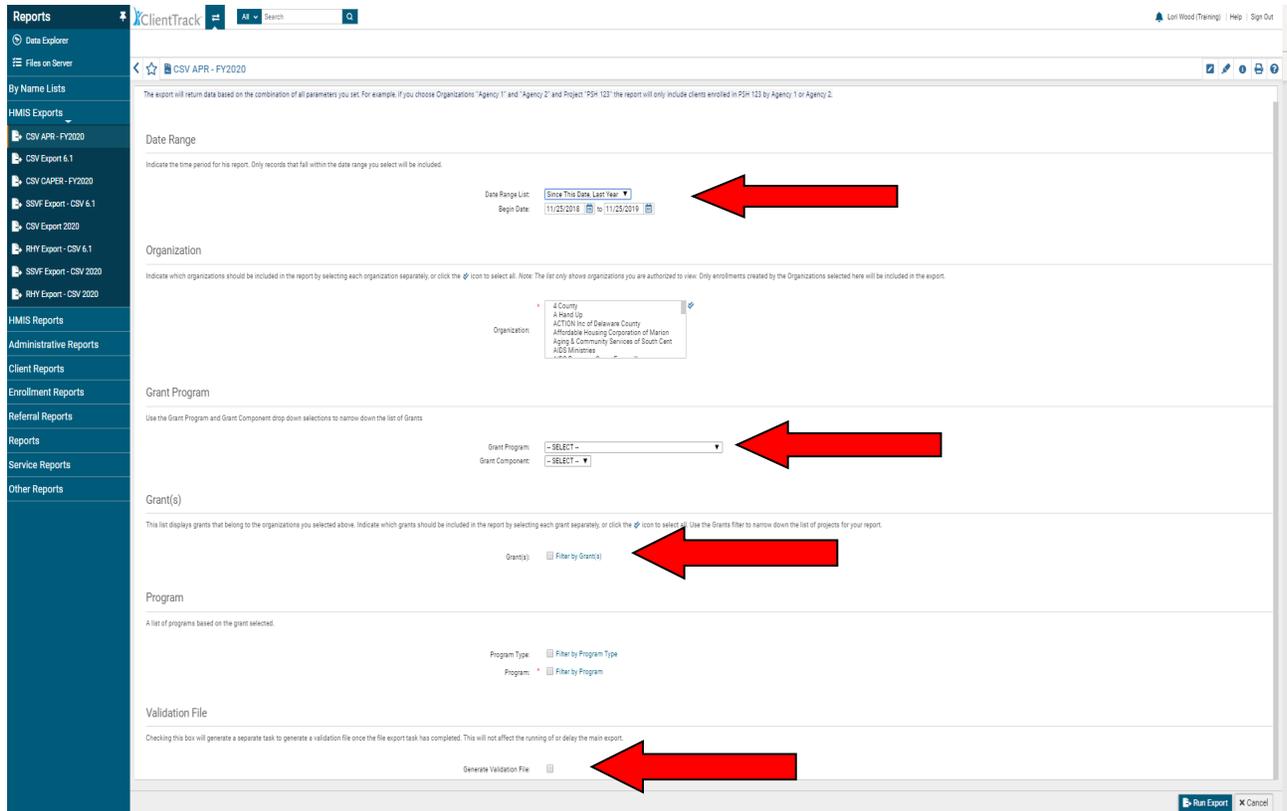
Running the Export



From the “**Reports**” workspace, click on the “**HMIS Exports**” Menu Group on the left-hand side of the screen. Select the “**CSV APR-FY2020**”

Setting Export Parameters

Set up the report parameters by entering the date range with a predefined option in the drop down list or enter the date range in the “**Begin Date**” field. Your organization will auto populate. Select the “**Grant Program**,” “**Grant Component**,” “**Grant(s)**,” “**Project Type**” and “**Program**” for the export. Also select “**Generate Validation File**” by clicking on the empty box beside it. A check mark should appear when this option is selected successfully.

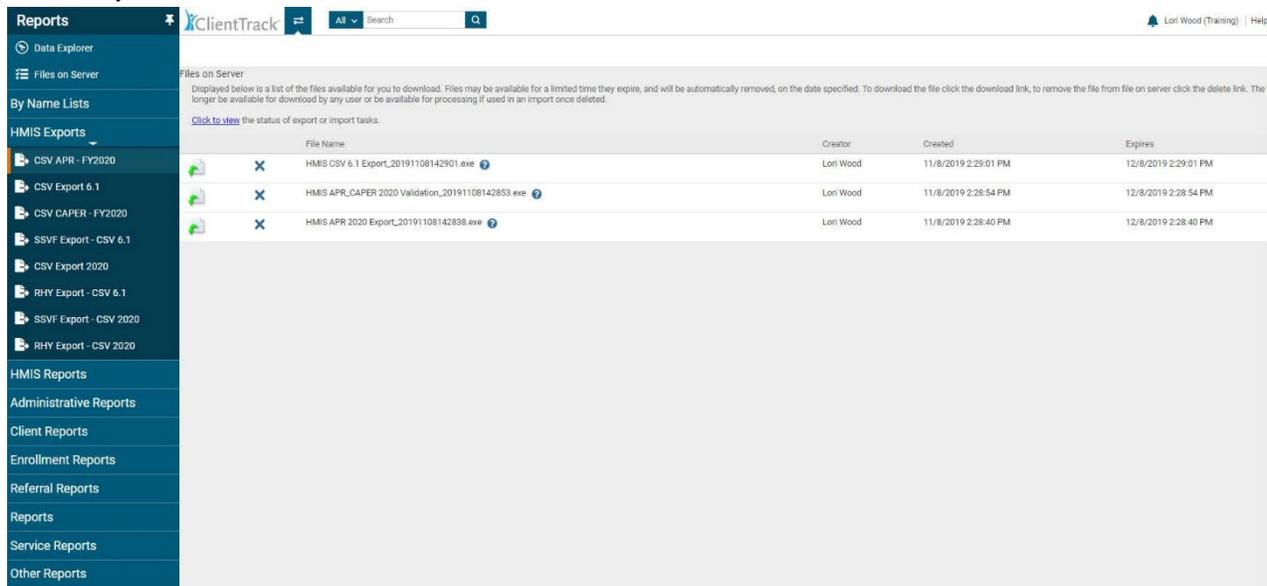
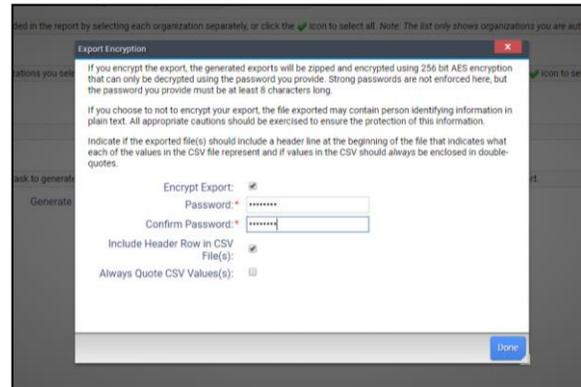


Click on **“Run Export”** in the bottom right-hand corner to begin the data export for your program.

Accessing Export Files & Report Preparation

An **“Export Encryption”** window will appear where you set the **“Password”** to protect the files. Enter a password and click **“Done”** to continue with the export.

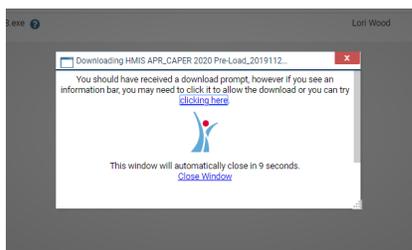
Unlike the former APR, a report will not appear in the window seconds after running the report. To access the files associated with the APR, click on the **“Files on Server”** link in the list of Menu Items to the left of the **“Reports”** screen.

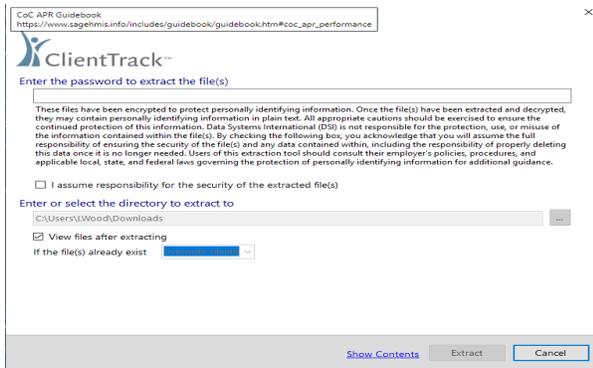


To access your APR files, click on the icon with the green arrow to begin downloading the files. There will be a number of files to download so we recommend creating a new folder to save all of the APR associated files together. This will also make it easier for you to access these files from your computer.

As seen below, a download window will appear after clicking on the icon with the green arrow.

Momentarily after that, another window may appear, with a **Warning**. Please click on **“More Info”** in the warning box, then click **“Run Anyway”**.



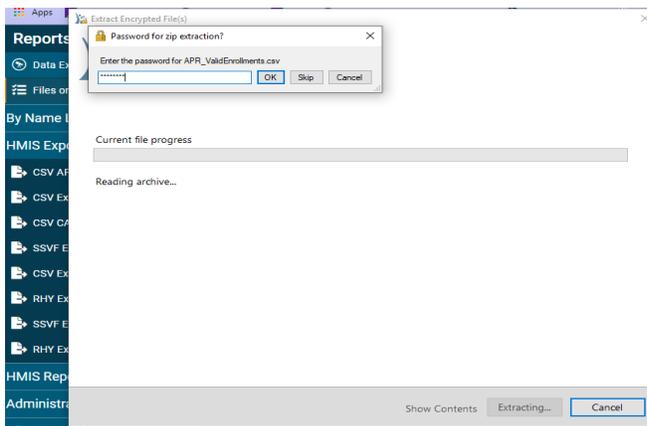


Momentarily after that, another window will appear, where you enter the password you created to protect the data.

After entering the password, search for the location on your computer where you wish to save the files. You can also select to **“View files after extracting”** by clicking on the empty box beside this option. If you wish to deselect this option, simply click on the check mark again to remove it.

Click **“Extract”** to continue downloading the files.

An Extract window will appear to show you the status of the transfer.



Once all of the files have been downloaded and extracted, you will see a list of Excel files on your computer as seen below. This concludes the APR export portion of the APR.

You can use the “HMIS APR_CAPER 2020 Validation...” file listed on the “Files on Server” screen to

The screenshot shows the 'Files on Server' section of the ClientTrack application. A table lists several files with columns for File Name, Creator, Created, and Expires. A red arrow points to the file 'HMIS APR_CAPER 2020 Validation_20191125154345.exe'.

File Name	Creator	Created	Expires
HMIS APR_CAPER 2020 Validation_20191125154345.exe	Lori Wood	11/25/2019 3:43:46 PM	12/25/2019 3:43:46 PM
HMIS APR 2020 Export_20191125154336.exe	Lori Wood	11/25/2019 3:43:38 PM	12/25/2019 3:43:38 PM
HMIS APR_CAPER 2020 Pre-Load_20191125153305.exe	Lori Wood	11/25/2019 3:33:06 PM	12/25/2019 3:33:06 PM
HMIS CSV 6.1 Export_20191108142901.exe	Lori Wood	11/8/2019 2:29:01 PM	12/8/2019 2:29:01 PM
HMIS APR_CAPER 2020 Validation_20191108142853.exe	Lori Wood	11/8/2019 2:28:54 PM	12/8/2019 2:28:54 PM
HMIS APR 2020 Export_20191108142838.exe	Lori Wood	11/8/2019 2:28:40 PM	12/8/2019 2:28:40 PM

review clients with missing data or data errors.

If you are uploading your report into Sage (and not all programs are required to do this), you can use the sandbox version of Sage to review your report (<https://demo.sagehmis.info/us/csvtest.aspx>).

The screenshot shows the 'Files on Server' table from the previous image, with a Windows File Explorer window overlaid on top. The File Explorer window shows the 'Downloads' folder, which contains the file 'HMIS APR_CAPER 2020 Validation_20191125154345.exe' and other files.

Name	Date modified	Type	Size
Annotation 2019-11-25 102241	11/25/2019 10:30 AM	PNG File	120 KB
APR_2020_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	174 KB
APR_2020_DQ_2_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	9 KB
APR_2020_DQ_3_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	12 KB
APR_2020_DQ_4_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	14 KB
APR_2020_DQ_5_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	5 KB
APR_2020_DQ_6_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	2 KB
APR_2020_DQ_7_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	1 KB
APR_2020_Q13_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	77 KB
APR_2020_Q14_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	20 KB
APR_2020_Q19_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	2 KB
APR_2020_Q21_Detail	11/25/2019 10:43 AM	Microsoft Excel Co...	131 KB
HMIS APR_CAPER 2020 Pre-Load_2019112515...	11/25/2019 10:35 AM	Application	1,818 KB
HMIS APR_CAPER 2020 Pre-Load_2019112515...	11/25/2019 10:40 AM	Application	1,818 KB
HMIS APR_CAPER 2020 Validation_201911251...	11/25/2019 12:27 PM	Application	1,868 KB
image001	11/25/2019 11:05 AM	PNG File	14 KB
MTHNFA_X_1e253ceb-5dac-42ad-a76d-99add...	11/25/2019 12:08 PM	Adobe Acrobat Doc...	109 KB

Files on Server

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
HMIS APR_CAPER 2020 Validation_20191125154345.exe	Lori Wood	11/25/2019 3:43:46 PM	12/25/2019 3
HMIS APR 2020 ExportL			
HMIS APR_CAPER 2020			
HMIS CSV 6.1 Export_20			
HMIS APR_CAPER 2020			
HMIS APR 2020 ExportL			

The screenshot shows a Windows File Explorer window with the address bar set to 'This PC > Windows (C:) > Users > LWood > Downloads'. The left sidebar shows the navigation pane with 'Downloads' selected. The main pane displays a table of files:

Name	Date modified	Type	Size
APR_2020_DQ_6_Detail	11/25/2019 12:30 PM	Compressed (zippe...	2,156 KB

A red arrow points to the file 'APR_2020_DQ_6_Detail'.

To upload your report to Sage, you must compress the APR files into a zipped folder. To compress the files, select all the files in the folder, then right click and “Send to” a **“Compressed Zipped Folder”** as seen here. The new compressed zipped folder will be what you select to upload into Sage to review your report.