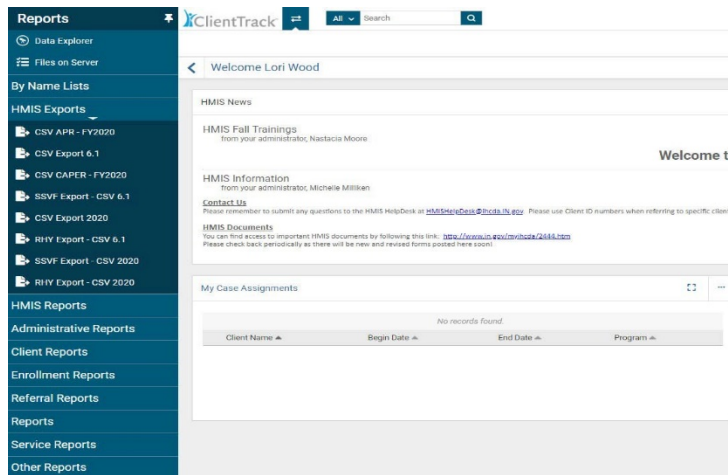


How to Export the Annual Performance Report (APR)

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.

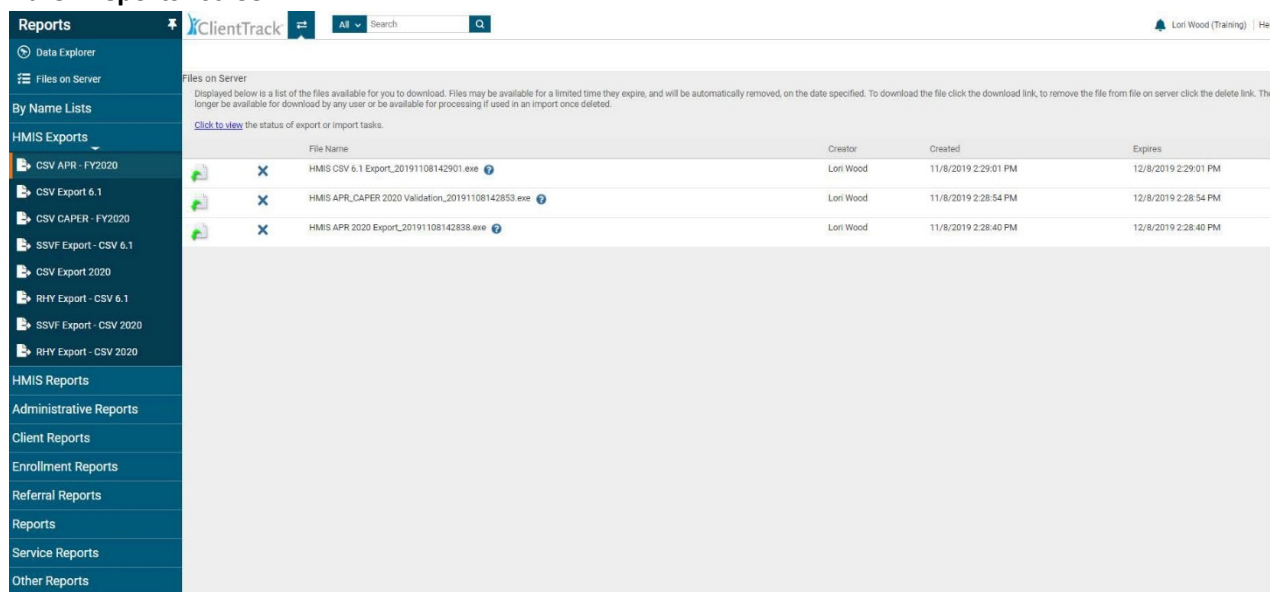
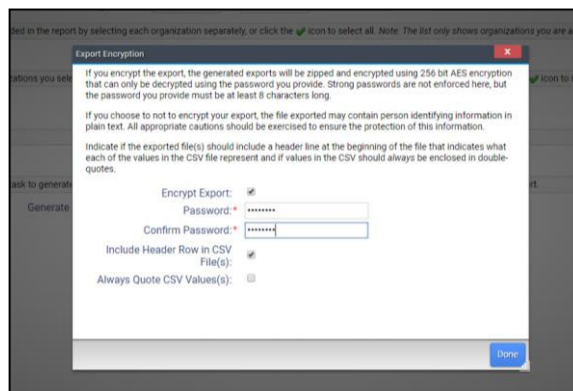
A screenshot of the 'CSV APR - FY2020' configuration page in ClientTrack. The page has a left sidebar with 'Reports' and 'HMIS Exports' sections. The main area is titled 'CSV APR - FY2020' and contains several sections for setting parameters. Red arrows point to specific fields: 1. 'Date Range' section: Points to the 'Date Range List' dropdown (set to 'Since This Date Last Year') and the 'Begin Date' field (11/25/2018). 2. 'Grant Program' section: Points to the 'Grant Program' dropdown (set to '- SELECT -'). 3. 'Grant(s)' section: Points to the 'Filter by Grant(s)' checkbox. 4. 'Program' section: Points to the 'Filter by Program' checkbox. 5. 'Validation File' section: Points to the 'Generate Validation File' checkbox. The bottom right corner has 'Run Export' and 'Cancel' buttons.

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

Accessing Export Files & Report Preparation

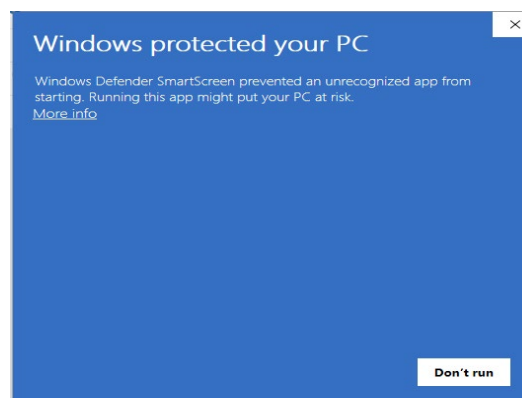
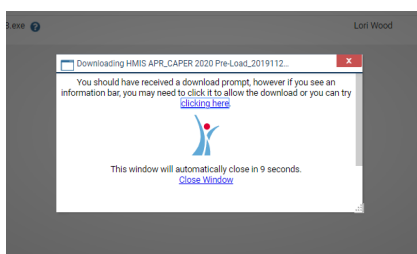
An **“Export Encryption”** window will appear where you set the **“Password”** to protect the files. Enter a password and click **“Done”** to continue with the export.

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”**.



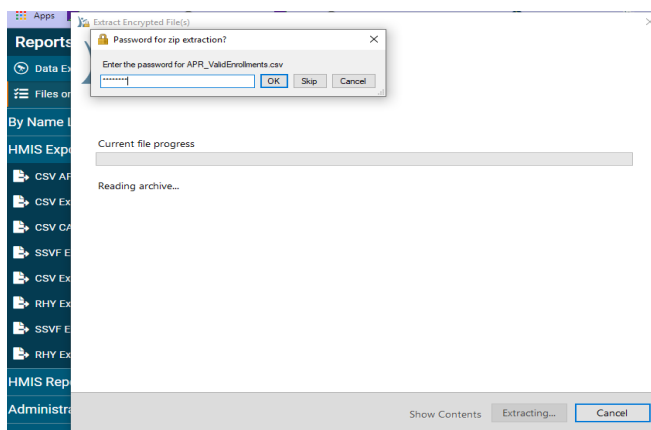


Momentarily after that, another window will appear, where you enter the password you created to protect the data.

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' interface in ClientTrack. A sidebar on the left contains navigation links: Reports, Data Explorer, Files on Server, By Name Lists, HMIS Active Client List, HMIS BNL Veterans, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, Reports, Service Reports, and Other Reports. The main area displays a table of files available for download. 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>).

This block contains two screenshots. The top screenshot is a partial view of the 'Files on Server' table, showing the first row: 'HMIS APR_CAPER 2020 Validation_20191125154345.exe' by Lori Wood, created on 11/25/2019 at 3:43:46 PM, and expiring on 12/25/2019 at 3:43:46 PM. The bottom screenshot shows a Windows File Explorer window open to the 'Downloads' folder. It lists various files, including 'Annotation 2019-11-25 102241', several 'APR_2020_Detail' and 'APR_2020_DQ_3_Detail' through 'APR_2020_DQ_21_Detail' files, 'HMIS APR_CAPER 2020 Pre-Load_2019112515...', 'HMIS APR_CAPER 2020 Validation_201911251...', 'image001', and 'MTHNFAX_1e253ceb-5dac-42ad-a76d-99add...'.

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
HIMIS APR_CAPER 2020 Validation_20191125154345.exe	Lori Wood	11/25/2019 3:43:46 PM	12/25/2019 3
HIMIS APR 2020 ExportL			
HIMIS APR_CAPER 2020			
HIMIS CSV 6.1 Export_20			
HIMIS APR_CAPER 2020			
HIMIS APR 2020 ExportL			

Windows File Explorer: Downloads

Path: This PC > Windows (C:) > Users > LWood > Downloads

Left sidebar: Documents, Pictures, syncplicity, 2018, 2019, Albion Fellows Bacon Center, User Manual, OneDrive, Syncplicity, This PC, 3D Objects, Desktop, Documents, Downloads, Music

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



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.