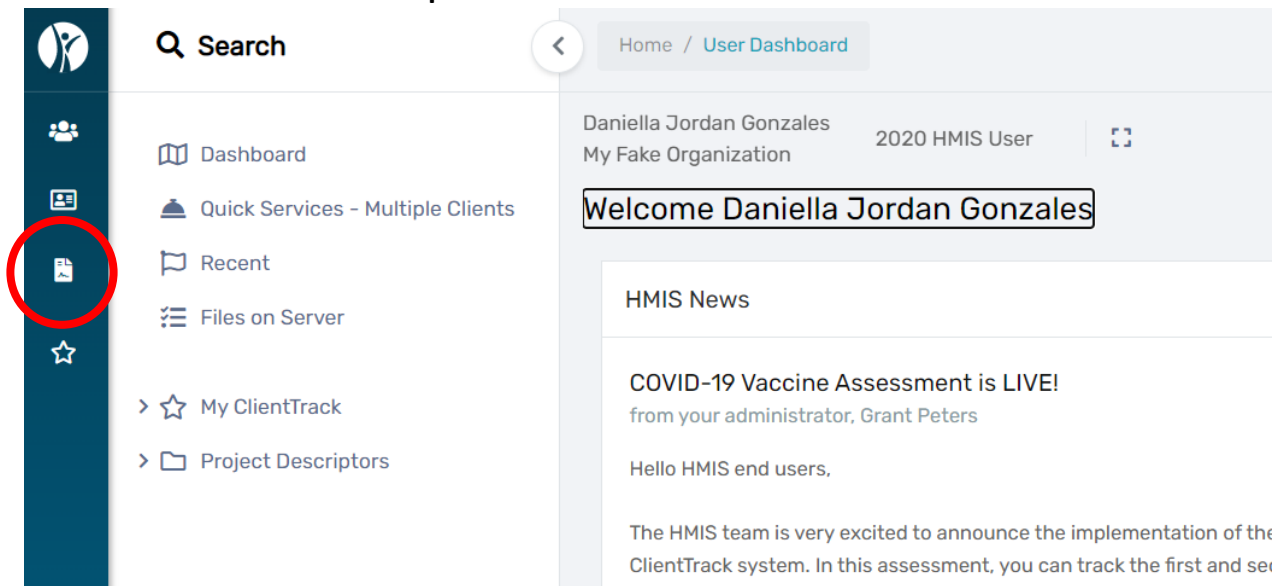# How to Run/Export the Consolidated Annual Performance & Evaluation Report (CAPER) or Annual Performance Report (APR) in HMIS/DV ClientTrack

Running the Export

1. Login under **"2020 HMIS User"** and click on the file icon on the left-hand side menu as shown below to access the "**Reports".**

2. Once in the "Reports" screen, **click HMIS Exports** from the white left-hand side menu as shown below. Make sure the white left-side menu is expanded by clicking on the back arrow at the top. A drop-down menu will appear. Select **"CSV APR -2023"** or **"CSV CAPER – 2023"** as shown below.
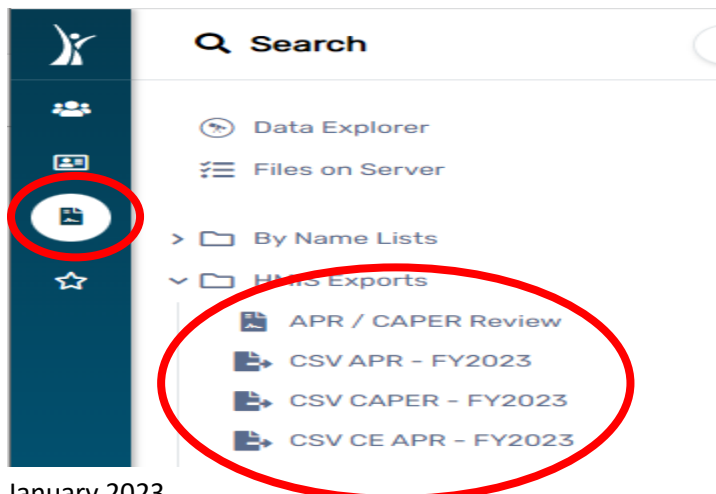
Setting Export Parameters

1. Set up the export 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.

2. Leave the **"Filter by Grant(s)"** field blank as this does not work properly and will cause issues when running the report.
3. Select the "**Project Type" and "Project (Name)"** for the export. Also select **"Generate Validation File"** by clicking on the checkbox. A check mark should appear when this option is selected successfully.

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

Accessing Export Files & Report Preparation

5. 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.

6. A pop-up will appear **"Your export has been queued and will be processed at the next available time."** Click **"OK"**
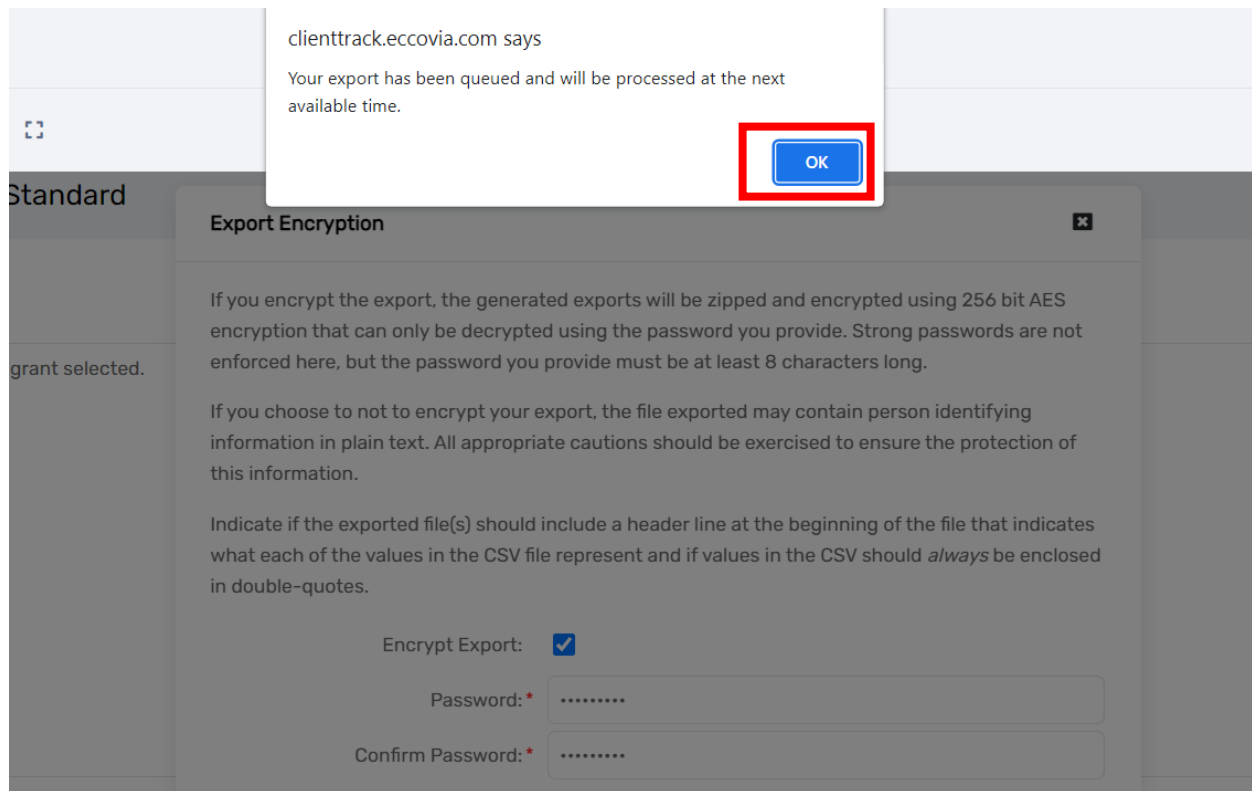
7. **NOTE:** It takes approximately 20 – 30 minutes for the report to load. To check the status of your report, click **"Files on Server"** as shown in the image below
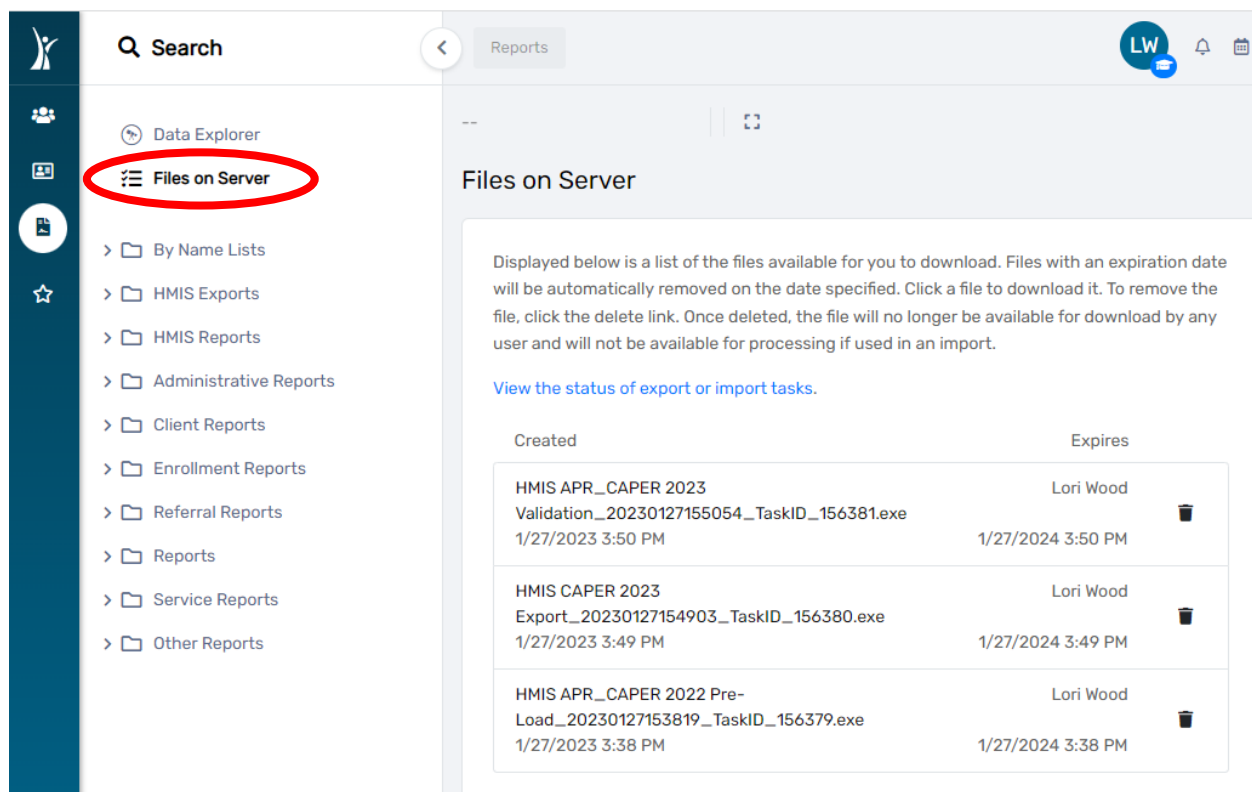
8. The report is ready once three separate files are displayed as indicated in the screenshot below. The following files will appear on the **"Files on Server"** screen once your report is ready.

   a. For CAPERs:
   - **HMIS APR CAPER 2023 Validation file**
   - **HMIS CAPER 2023 Export file**
   - **HMIS APR CAPER 2023 Pre-Load file**

   b. For APRs:
   - **HMIS APR CAPER 2023 Validation file**
   - **HMIS APR 2023 Export file**

HMIS APR CAPER 2023 Pre-Load file

9. Next, click anywhere on **"HMIS APR 2023 Export"** file if running an **APR** as shown in the image below.

CAPER: You will download, compress, and upload the "HMIS CAPER 2023 Export" file to SAGE.
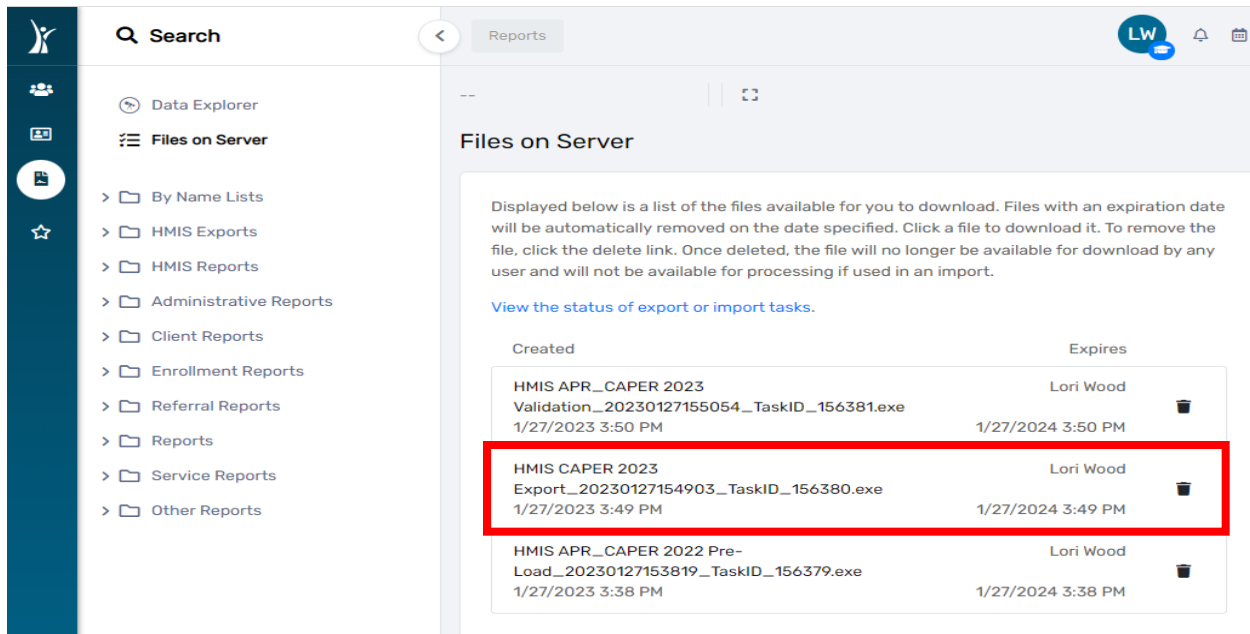
APR: You will download, compress, and upload the "HMIS APR 2023 Export" file to SAGE.

IMPORTANT NOTE: *SAGE WILL NOT ACCEPT THE "VALIDATION OR PRE-LOAD" FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE "EXPORT FILE" IN SAGE.*

10. After clicking on **"HMIS APR 2023 Export"** file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select **"Open or Open when done**" as shown below.
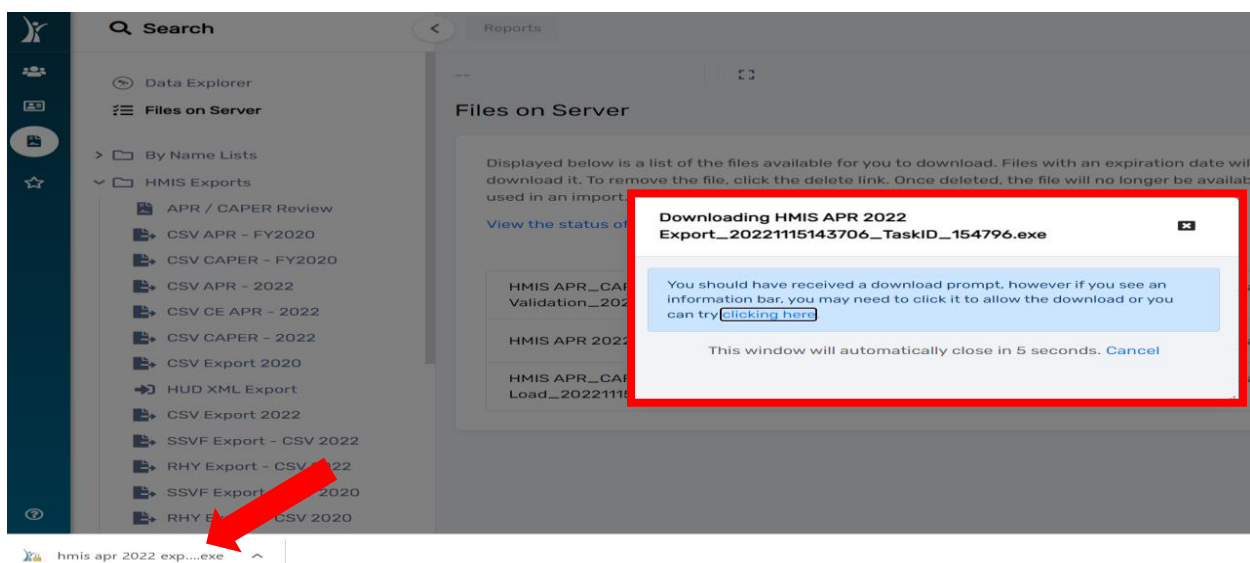
11. You may receive the message below. Please click on **"More info"**
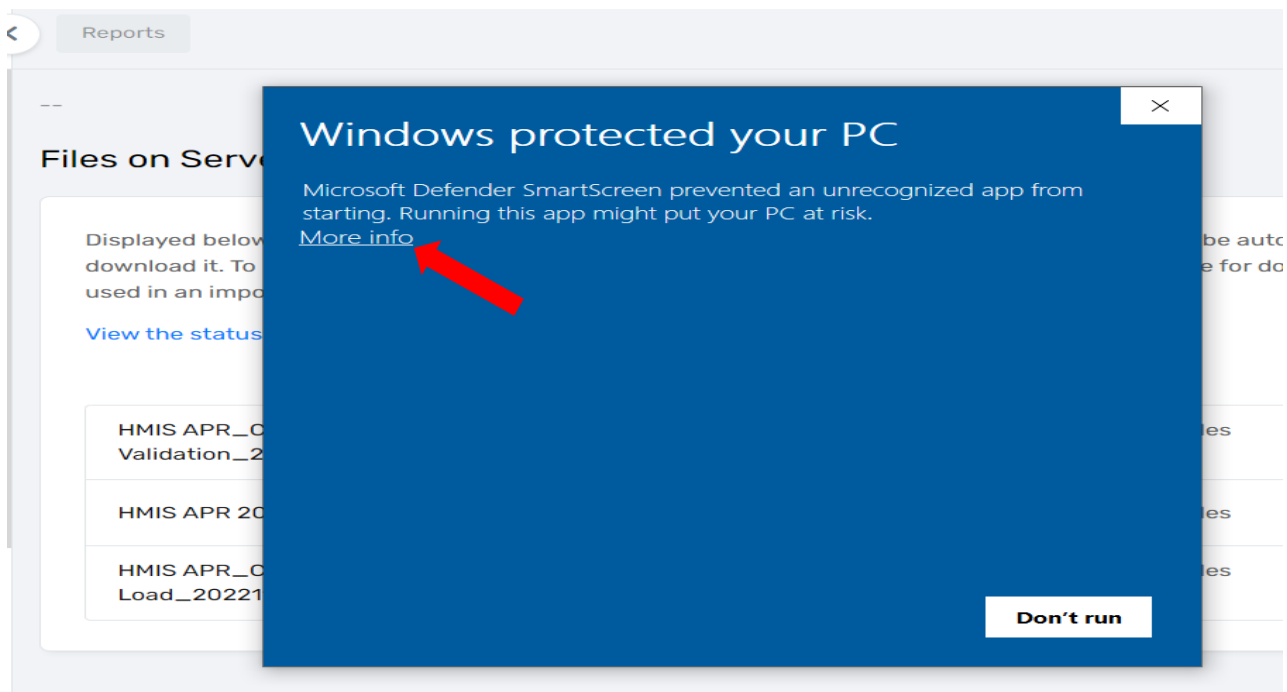
12. Next, click the **"Run anyway"** option as seen below
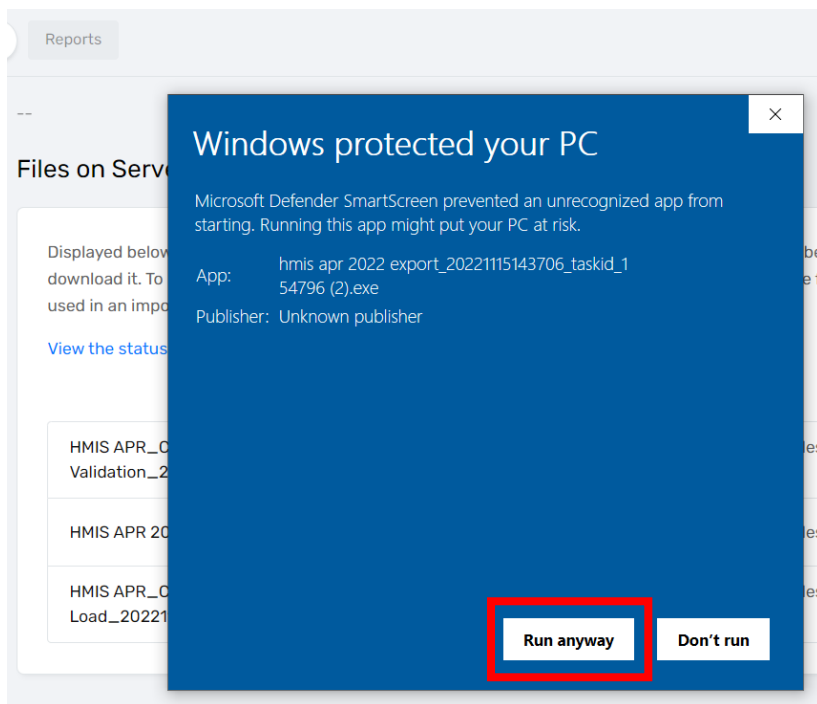
13. Enter the password you created during **Step 4** of this guide, click the check box **"I assume responsibility for the security of the extracted file(s)"**, then select **"Extract"**
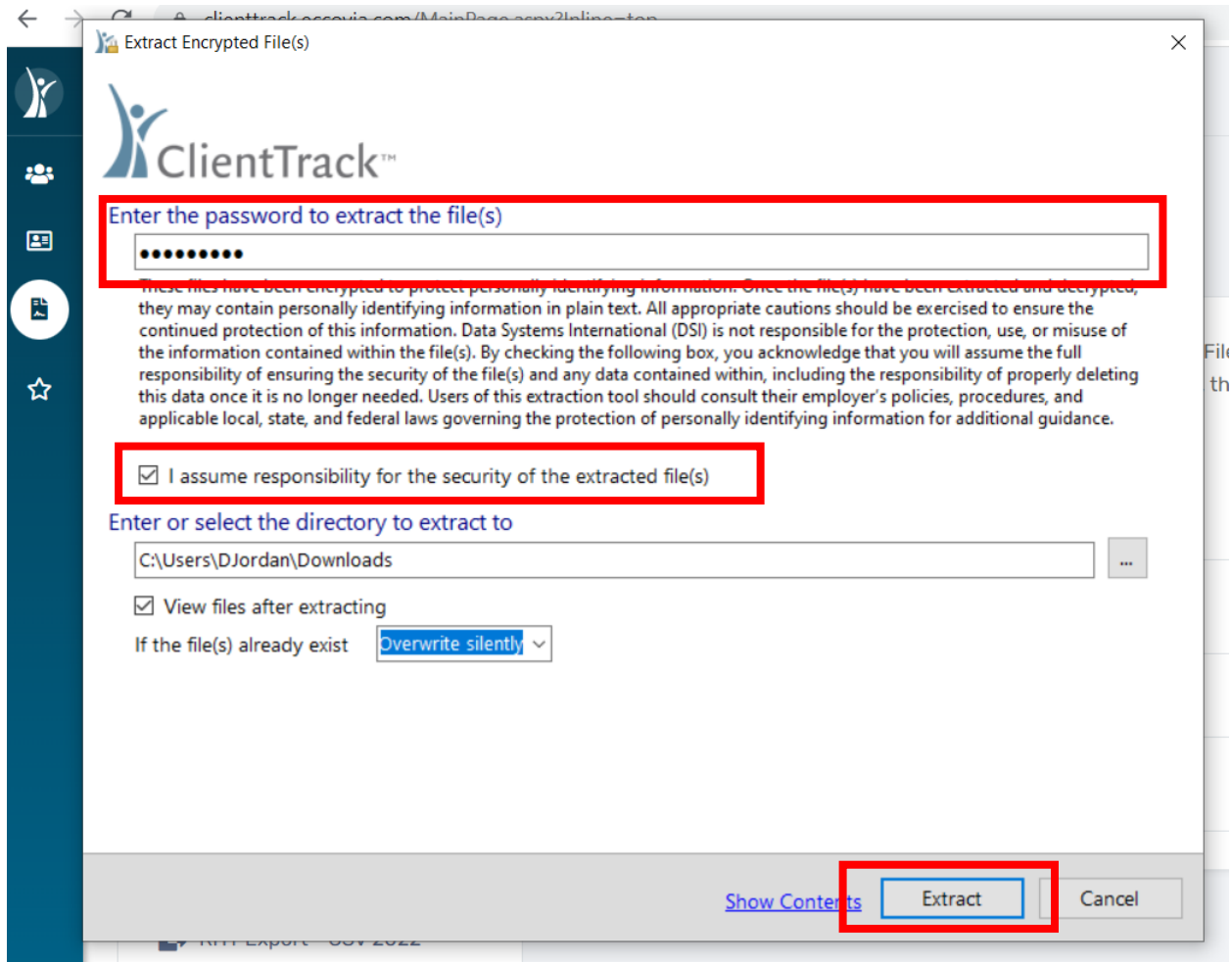
14. The files will download to your computer as seen below.
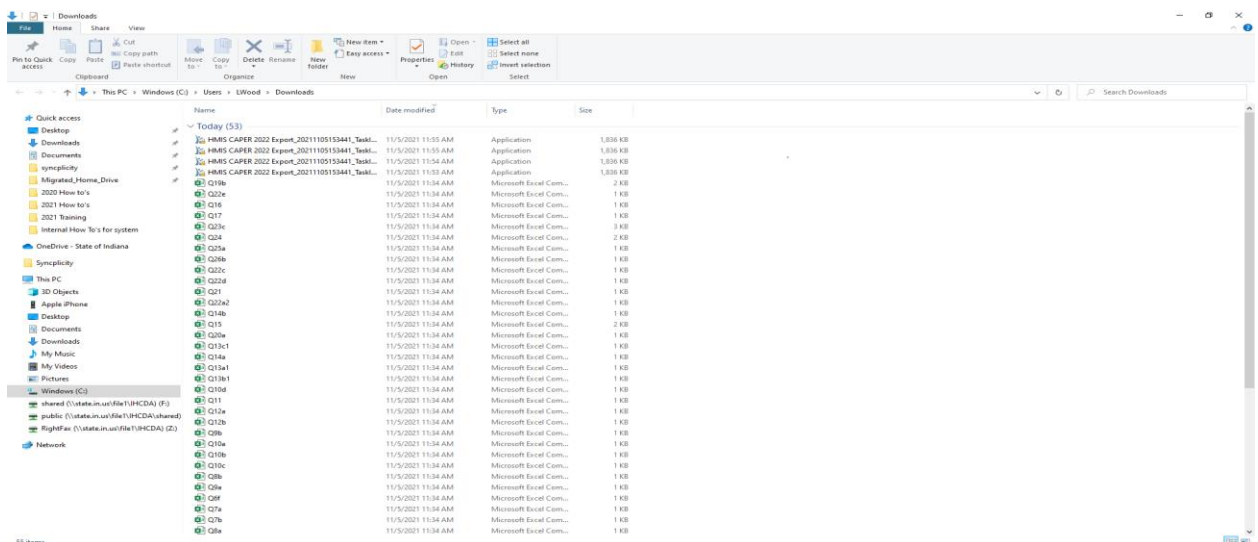
15. Click on the first **"Q"** file and hold down the shift key while using your "arrow down" key to highlight all the **"Q"** labeled report files. Next, right click and select the **"Send to" "Compressed (zipped) folder"**
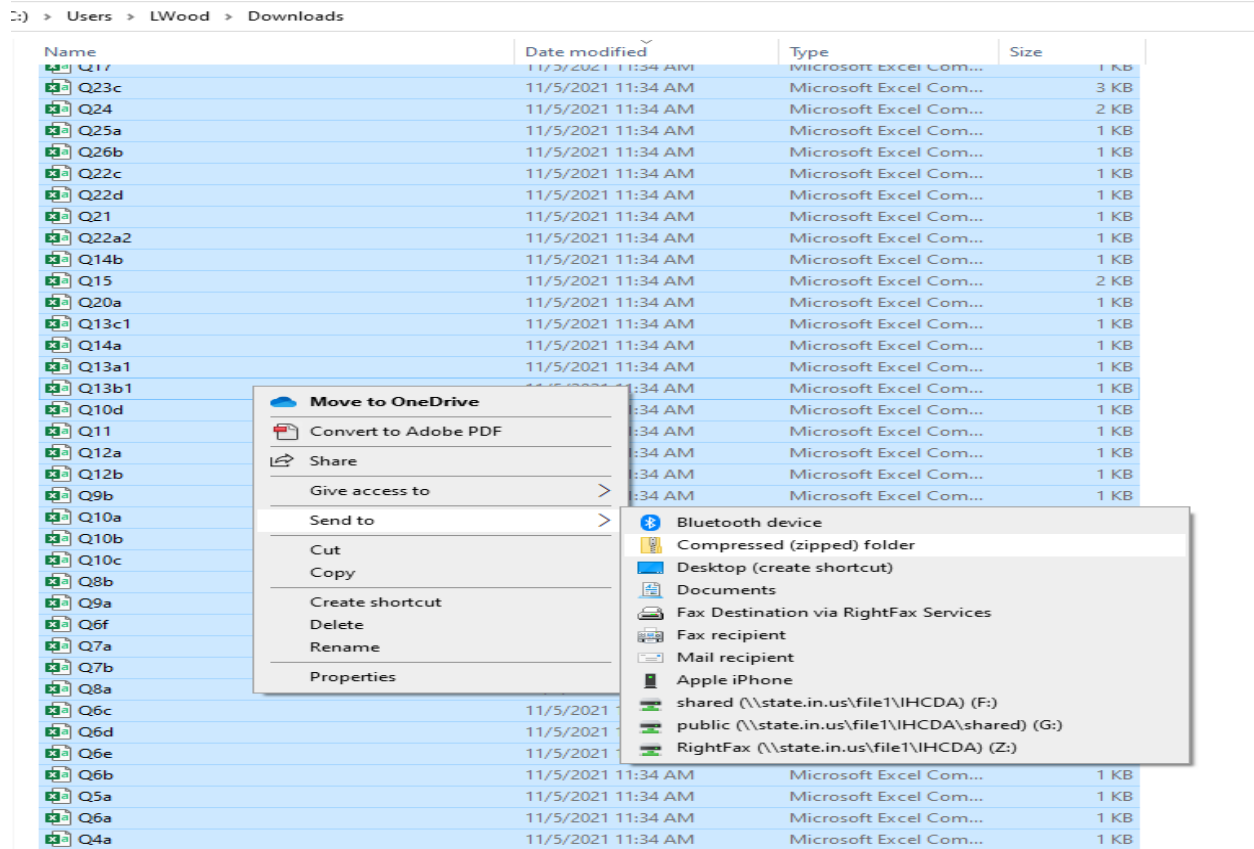
16. The **"zipped"** folder will appear on your screen. Enter the name of your report for the **"zipped"** folder.

17. Next, delete the individual **"Q"** files still showing in the **"download"** files on your computer. You only need to keep the **"zipped"** folder for upload to SAGE.

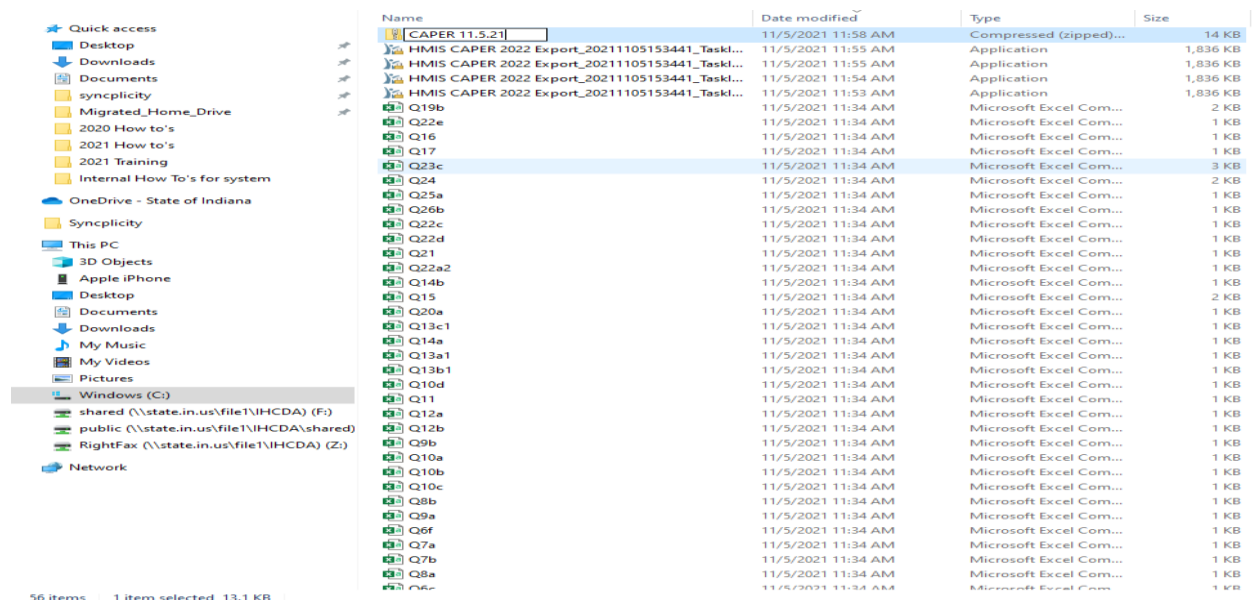| Name	Date modified	Type	Size
Q17	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q23c	11/5/2021 11:34 AM	Microsoft Excel Com...	3 KB
Q24	11/5/2021 11:34 AM	Microsoft Excel Com...	2 KB
Q25a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q26b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q22c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
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	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q9b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q8b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q9a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6f	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q7a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q7b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q8a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6d	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6e	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q5a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q4a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB

Context menu overlaid on the list:
- Move to OneDrive
- Convert to Adobe PDF
- Share
- Give access to >
- Send to >
- Cut
- Copy
- Create shortcut
- **Delete**
- Rename
- Properties

Please email your respective helpdesk at hmishelpdesk@ihcda.in.gov or dvhelpdesk@ihcda.in.gov for further assistance.