The HMIS ReportBuilder

AWARDS INSTRUCTION SHEET

The AWARDS HMIS ReportBuilder feature, located in the Profile module, is a powerful reporting tool that can be used to generate user-customized reports of client and household member data, including all required information collected for the HUD APR.

The HMIS ReportBuilder is only available in AWARDS when at least one program has been set up to submit the HUD APR (using the Add/Edit Entire Program component of the System Setup module's Agency Program Information feature). In such cases the ReportBuilder can be used for all programs, though you should keep in mind that many of the variables available for inclusion in the report are only captured by APR programs and as such the report may not be complete for non-APR programs.

When working with the HMIS ReportBuilder tool, users have the ability to:

▪ Create reports of client and household member characteristics entered in a variety of places.	▪ Filter report contents by one or more selected client or household member characteristics.
▪ Include either individual detail or aggregate counts of each characteristic selected.	▪ Sort and group report data by various client and household member characteristics.
▪ Save frequently generated reports so that they can be easily re-run in the future.	▪ Run reports for any date range and program.

Permissions required to run an HMIS ReportBuilder report are as follows:

- *CHART ACCESS – You must have chart access permission to the program(s) for which the report is being run.*
- *DATA ENTRY / ACCESS – You must have the "Display Any Chart Records Buttons" and "Display Chart Records Profile Button" data entry/access permissions in order to access the Profile module in which the HMIS ReportBuilder feature is located.*

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the HMIS ReportBuilder feature to complete common report generation tasks such as those mentioned above. Specific topics covered are:

GENERATING A NEW REPORT

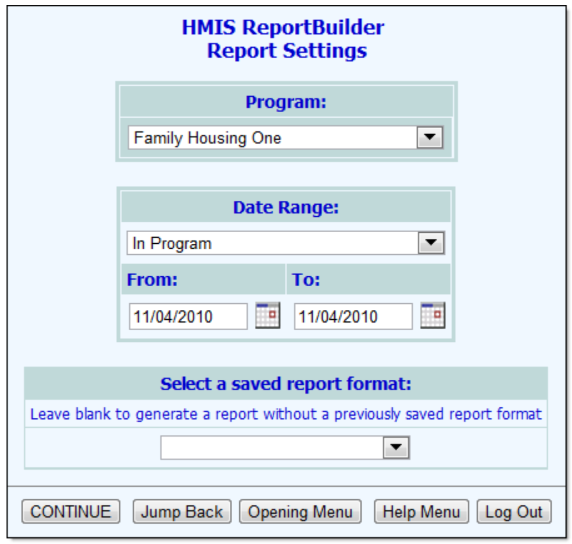
To create and save an HMIS ReportBuilder report that can be re-run in the future, or to generate a single-use report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Profile**. The *Consumer/Program Profile* menu page is displayed.

2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

   Please keep in mind that this report was designed primarily for use by programs set up to submit the HUD APR. In AWARDS databases where no programs have been set up to submit the APR, the HMIS ReportBuilder functionality is NOT available. In AWARDS databases where at least one program has been set up to submit the APR, the HMIS ReportBuilder functionality is available for all programs. Keep in mind though that for programs that do not submit the APR many of the variables available for inclusion in the report are not collected, and as a result the report may not be complete.

3. Click **HMIS ReportBuilder**. The *Report Settings* page is displayed.



   This page contains date range selections, as well as a list of any saved report formats to which you have access.

4. Click the **Date Range** drop-down arrow and choose which clients are to be included in the report based on their program history. Available selections are:

   IMPORTANT! *In all instances household members of clients are included in the report when those clients meet the criteria specified here and in step 5.*

   - **In Program –** When this option is selected the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. This selection is recommended if you will be narrowing the report contents using multiple date range filters (set in step 11 below).

     In this context, clients who were enrolled in the program include those who entered the program on or before the report "To" date, those who were discharged from the program on or after the report "From" date, and those who were enrolled in the program for the entirety of the report period.

   - **Admissions –** When this option is selected the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range.

   - **Discharges –** When this option is selected the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be included.

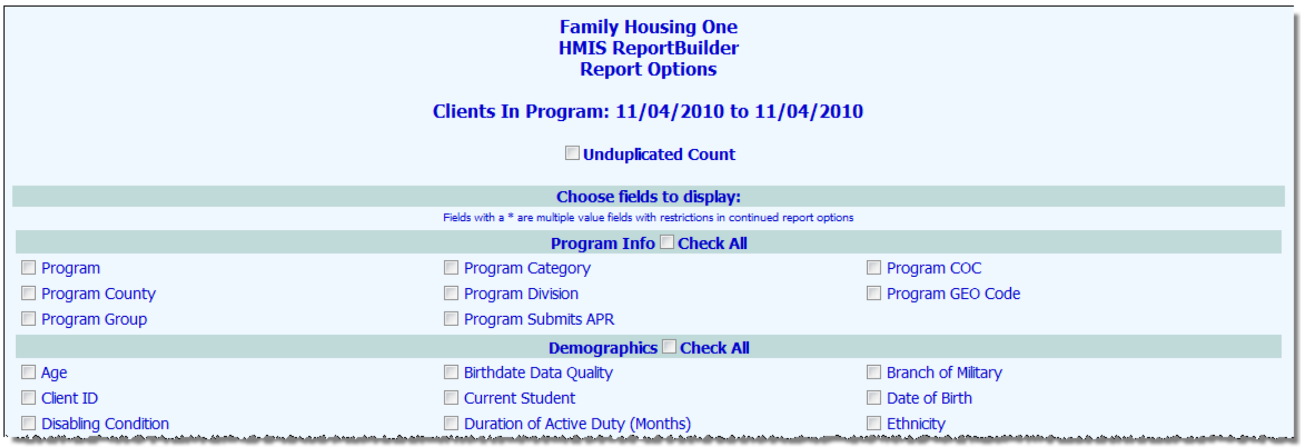
   In the event that you are creating a new report format that will be saved, please be aware that the selection you make here is not saved with the report. It, along with the date range specified in step 5, must be set each time the report is run.

5. By default, the report only looks for clients with program histories (of the type specified in the previous step) for today's date. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format).

6. Leave the **Select a saved report format:** drop-down selection blank to generate a new report.

   To view an existing report for which a format was previously saved, see "Viewing or Updating an Existing Report" on page 10.

7. Click **CONTINUE**. The *Report Options* page is displayed.



This page contains a list of program, client, and household member characteristic check boxes, grouped by information type, and representing data collected in several AWARDS locations:

Intake Form	Face Sheet	Household Info Form	Discharge Form	Agency Program Info

Several other characteristics which are not necessarily found on the above forms are also available; for example "Age" and "Client ID."

The program, client, and household characteristics available for selection on this page are those that the agency collects for the programs set to submit the HUD APR. While the report can be run for non-HUD programs, keep in mind that for such programs many of the report variables are not collected and so the report may not be complete.

8. The HMIS ReportBuilder report includes all clients who were enrolled in, admitted to, or discharged from the selected program(s) during the specified date range, based on the selection made in step 4, along with their household members. In some cases, that may result in duplicate report records in instances where a client has multiple histories in a single program, or a history in multiple programs. To filter out those duplicates and to list each client and household member only once in the report results, click the **Unduplicated client count** check box.

9. Click the check box next to each program, client, and household member characteristic for which data is to be included in the report.

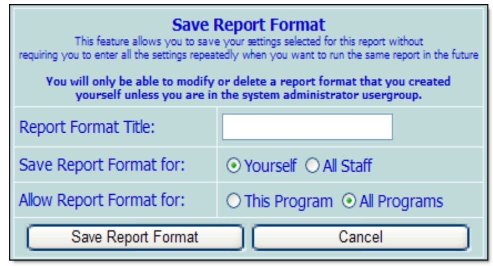
   Characteristic fields with an asterisk (*) next to them are those for which one client or household member may have multiple values. Multiple value fields include those that have check boxes for data entry where multiple boxes may be checked for each individual, as well as instances where multiple records may have been entered for a client, such as children details.

10. Click **CONTINUE**. The *Report Options – Continued* page is displayed.

11. Configure the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents, and set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

    Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, see "Understanding HMIS ReportBuilder Report Options" on page 6.

12. To save the report settings so that this report can be easily re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

    If it is not necessary to save the report format and you wish only to view the report contents, please skip to step 17.

13. In the **Report Format Title** field, type the name of the report.

    We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

14. Click one of the **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

    - **Yourself –** When this option is selected, only the user saving the report format has the ability to use or modify that format.

    - **All Staff –** When this option is selected, all staff in the program(s) selected in step 2 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

      In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

15. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

    - **This Program –** When this option is selected, the report format being saved is available for use only by the program selected in step 2.

    - **All Programs –** When this option is selected, the report format being saved is available for use by all programs, regardless of which program was selected in step 2.

    The Allow Report Format for options are only available when a single program was selected in step 2; otherwise, the format is saved for all programs by default.

16. Click **Save Report Format**. The report format is saved and the *Report Options – Continued* page is re-displayed.

17. Click **DISPLAY REPORT**. The report is generated and displayed on the *HMIS ReportBuilder* page.

    When working with the report data, please keep in mind that:

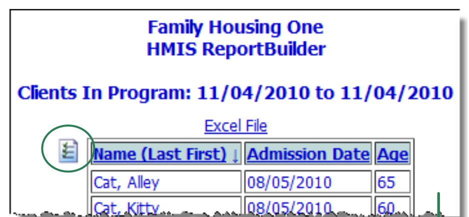
- *The report shows the values for each characteristic as of the date on which the report is generated. For example, if a client's marital status on his or her date of intake was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the client's intake date.*

- *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each client or household member includes a list of the characteristic values separated by commas. Additionally, because each client or household member may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total record count for the report.*

- *If a report's results include fewer than 5,000 records, the data comes from the live database. If the report's results include more than 5,000 records, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. The number of records included in the report, and the link to the data file (if applicable), is displayed on the report page.*

18. Once the report is displayed, complete any of the following tasks as needed:

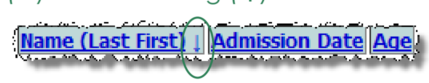
- **Show/hide individual detail or summary table columns –** In some cases you may have chosen to include a characteristic in the report for filtering purposes, but do not necessarily want to see it included in the individual detail table. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page. To do so, click the show/hide icon to the left of the table you would like to alter. The *Column Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed. Checked columns are displayed, unchecked are hidden.



  Showing/hiding columns of individual detail or summary tables does not impact the contents of the Excel File version of the report data. Additionally, the show/hide icon is not included in print versions of the report.

- **Sort table contents –** Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press **<SHIFT>** and click on the second column heading.

  An ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↓) or descending (↑) order. In this example, the table is being sorted alphabetically by client/household member name from A to Z.



  Changing the sort order of an individual detail or summary table does not impact the contents of the Excel File version of the report data.

- **Print the report –** To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.

- **Export the contents to Microsoft Excel –** To do so, click the **Excel File** link at the top of the page.

- **Save the format of the report for future use if you have not already done so –** To do so, click the Internet browser's **Back** button to return to the *Report Options – Continued* page, and then complete steps 12 through 16 above.

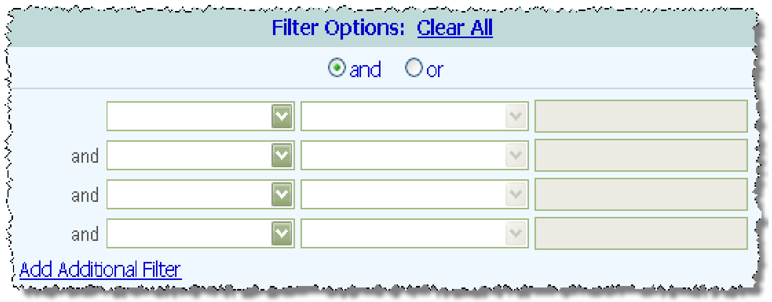
The process of generating a new HMIS ReportBuilder report is now complete.

UNDERSTANDING HMIS REPORTBUILDER OPTIONS

When generating an HMIS ReportBuilder report, several report options are available for the purposes of customizing the report contents and the way in which those contents are displayed. Each of these options, set on the *Report Options – Continued* page, is explained in detail below.

FILTER OPTIONS

The HMIS ReportBuilder filter options are located at the top of the *Report Options – Continued* page.



These filters enable users to adjust the scope of report contents by applying user-specified criteria to the program, client, and household member characteristics chosen on the initial *Report Options* page.

Filters are applied to the report contents regardless of whether those contents are displayed using the individual detail report options, summary tables, or both. For more information on individual detail and summary tables, please see the corresponding sections below.

To use the HMIS ReportBuilder filters, complete the following steps:

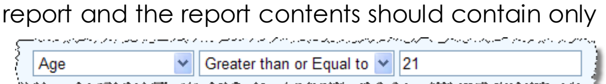
1. In the first filter options row, click the drop-down arrow in the left-hand column and select the characteristic with which the report contents are to be filtered.

   The drop-down lists in this column are populated with the program, client, and household characteristics selected on the previous Report Options *page.*

2. Click the corresponding drop-down arrow in the middle column and select the type of filter to be used:

Equals	Not Equal to	Greater than
Greater than or Equal to	Less than	Less than or Equal to
Contains	Does not Contain	Is Blank
Is not Blank	Between	

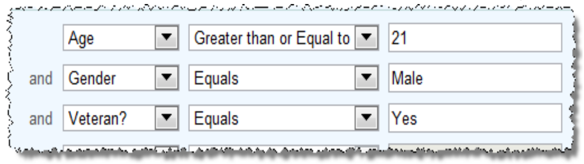
3. In the corresponding field(s) to the right of the filter selection, type the filter criteria. For example, if "Age" was selected as one of the characteristics to be included in the report and the report contents should contain only clients or household members with an age of 21 years or older, the filter options would be set as shown here.



   In most instances AWARDS completes logic checks to ensure that the filter criteria entered are logical; however, those checks are not performed when "Between" is selected as the filter type.

   Report filters are not case sensitive when entering text; however, when entering dates you should always use the format mm/dd/yyyy.

4. To combine multiple filters to further refine the report results, click the **and** or **or** radio button. For example, if "Age," "Gender," and "Veteran" were selected as characteristics to be included in the report, and the report contents should contain only male clients or household members with an age of 21 years or older who are veterans, the filter options would be set as shown here.



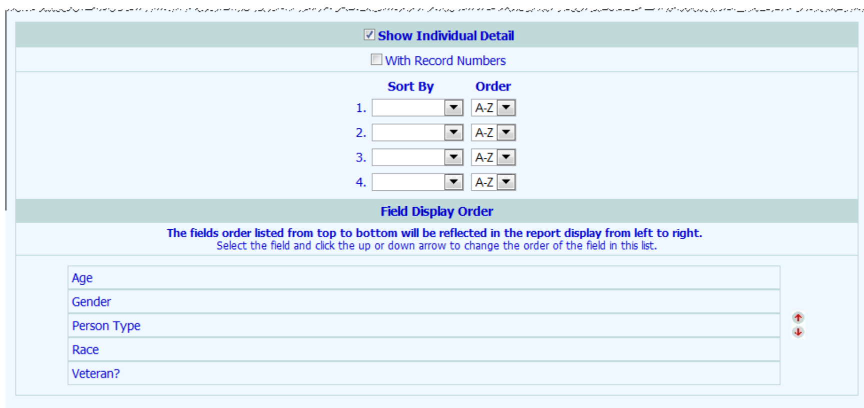
It is not possible to combine "and" and "or" filters. As a result, the filter combination selection made in this step applies to all of the filter options set for the report.

5. When initially setting the filter options, up to four filters can be added. If it is necessary to add more, click the **Add Additional Filter** link. Using that link, four additional filters can be added, up to a total of eight.

The process of setting the ReportBuilder filter options is now complete.

INDIVIDUAL DETAIL OPTIONS

The HMIS ReportBuilder individual detail options are located in the middle of the *Report Options – Continued* page.



These options enable users to adjust the way in which report contents are displayed. Specifically, when the report content is displayed with individual detail, the report includes a column for each characteristic data field and a row for each client or household member record (after filters are applied, if applicable). The total record count is also displayed beneath the report table.

Once a user chooses to include individual detail in the report, he or she can apply sort options to control the order in which the rows of data are displayed, and field options to control the order in which the columns of data are displayed.

The individual detail report options can be used alone, or in combination with the summary table report options described under "Summary Table Options" on page 8. If the individual detail report options are not used, summary table selections must be made before the report can be generated.

To use the HMIS ReportBuilder individual detail options, complete the following steps:

1. Click the **Show Individual Detail** check box. The *Report Options – Continued* page is refreshed to display additional individual detail options.

2. If the rows of report data should be numbered, click the **With Record Numbers** check box.

   This check box and the other individual detail table-related options mentioned in the steps that follow are not available on the Report Options – Continued page until step 1 has been completed.

3. To sort the rows of individual detail by one of the client, program, or household member characteristics chosen on the previous page, click the **Sort By** drop-down arrow and select that characteristic.

The sort by drop-down lists are populated with the characteristics selected on the previous Report Options *page.*

4. Click the corresponding **Order** drop-down arrow and indicate whether the sort is to be ascending ("A-Z") or descending ("Z-A").

5. Repeat steps 3 and 4 as needed for a total of up to four sort by selections.

   If fewer than four characteristics were chosen on the Report Options *page, the number of available sort by options equals the number of selected characteristics.*

6. To adjust the order of the columns of individual detail in the report contents, click a characteristic in the "Field Display Order" portion of the page to highlight it.

   If more than eight characteristics were chosen on the Report Options *page, the "Field Display Order" portion of the page is not automatically populated with the client characteristics. To view the characteristics list so that the order of the columns can be adjusted, click **Show Ordered Field List** before completing this step.*

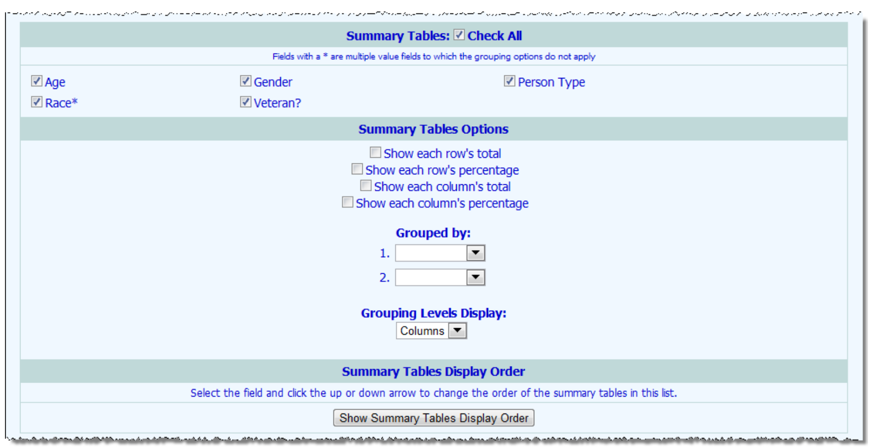
7. Use the up and down arrow icons to the right of the "Field Display Order" section to move the highlighted characteristic up or down in the list, or drag and drop the characteristic to the desired list position.

   The field display order listed from top to bottom here is reflected in the report data columns display from left to right.

The process of setting the individual detail report options is now complete.

SUMMARY TABLE OPTIONS

The HMIS ReportBuilder summary table options are located at the bottom of the *Report Options – Continued* page.►



These options enable users to include aggregate counts of each selected program, client, or household member characteristic. They also allow for customization of how those counts are displayed, and the types of information included.

The summary table report options can be used alone, or in combination with the individual detail report options described under "Individual Detail Options" on page 7. If the summary table report options are not used, individual detail selections must be made before the report can be generated.

To use the HMIS ReportBuilder summary table options, complete the following steps:

1. To include summary data / aggregate data in the report contents for one or more program, client, or household member characteristics, click the corresponding check boxes in the "Summary Tables" portion of the page, or click the **Check All** check box to select all characteristics.

For example, if "Gender" and "Veteran?" are selected as summary table options and the report is generated, the report contents will include a separate summary table for each, with aggregate counts of each characteristic as shown here.

Record Count: 34

VETERAN? ↓	Count
-No Data-	15
Don't Know	1
No	16
yes	2

GENDER ↓	Count
Female	14
Male	19
Transgendered Male to Female	1

The summary tables check boxes list is composed of the program, client, and household member characteristics selected on the previous Report Options *page; however, several characteristic data fields are not available for selection as part of a summary table, regardless of whether they were selected on the previous page. These characteristics – such as name (first, last, middle, and alias), date of birth, social security number, and client ID – are excluded because they have values that are unique to each individual, and are unlikely to generate any meaningful summary data.*

2. To total each column and/or row in the summary table, click the **Show each column's total** check box and/or **Show each row's total** check box, respectively.

   These "total" check boxes and the other summary table-related options mentioned in the steps that follow are not available on the Report Options – Continued *page until one or more summary tables are chosen in step 1.*

3. To include in the summary table the percentage of clients/household members out of the total client/household member count that have the data in each column or row, click the **Show each column's percentage** check box and/or **Show each row's percentage** check box, respectively.

4. To group the summary table information by a selected characteristic, click the first **Grouped By** drop-down arrow and select the characteristic by which the summary table report results are to be grouped.

   For example, if a report is generated with the "Veteran?" summary table option checked and with "Gender" as the Grouped By selection, the report contents will appear as shown here.

Record Count: 34

VETERAN? ↓	GENDER		
	Female	Male	Transgendered Male to Female
-No Data-	5	9	1
Don't Know	0	1	0
No	9	7	0
yes	0	2	0

   Multiple value fields (noted with an asterisk) cannot be selected as the characteristic used for grouping.

   The grouping options described here in steps 4, 5, and 6 are only applicable when more than one summary table is available for inclusion in the report.

5. To group the summary table information by a second characteristic as well, click the second **Grouped By** drop-down arrow and select that characteristic. When a second grouping selection is made, subgroups are created under the primary grouping level in the report contents.

   For example, if a report is generated with the "Veteran?" summary table option checked, "Gender" as the primary grouping, and "Employment" as the secondary grouping, the report contents will appear as shown here.

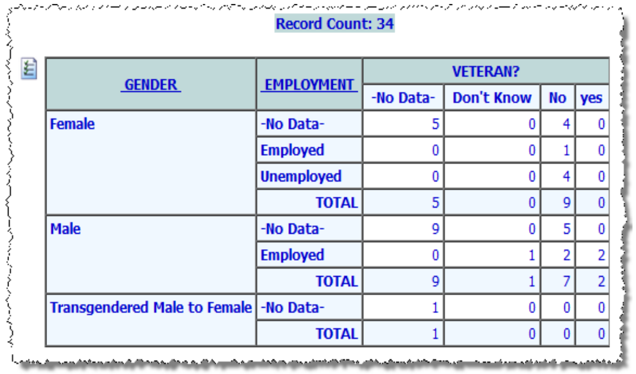
Record Count: 34

VETERAN? ↓	GENDER								
	Female				Male			Transgendered Male to Female	
	EMPLOYMENT			TOTAL	EMPLOYMENT		TOTAL	EMPLOYMENT	TOTAL
	-No Data-	Employed	Unemployed		-No Data-	Employed		-No Data-	
-No Data-	5	0	0	5	9	0	9	1	1
Don't Know	0	0	0	0	0	1	1	0	0
No	4	1	4	9	5	2	7	0	0
yes	0	0	0	0	0	2	2	0	0

6. If one or both "Grouped By" selections have been made, click the **Grouping Levels Display** drop-down arrow and select one of the available options to indicate how the summary table fields and grouped by selections should be positioned in the summary tables:

- **Columns –** When this option is selected, the summary table fields are rows in the summary tables, while any grouped by selections are displayed as columns across the top of the tables.

- **Rows –** When this option is selected, the summary table fields are displayed as columns in the summary tables, while any grouped by selections are displayed as rows in the tables. For example, if the sample report shown in step 5 is set to use "Rows" instead of "Columns," the report contents will appear as shown here.



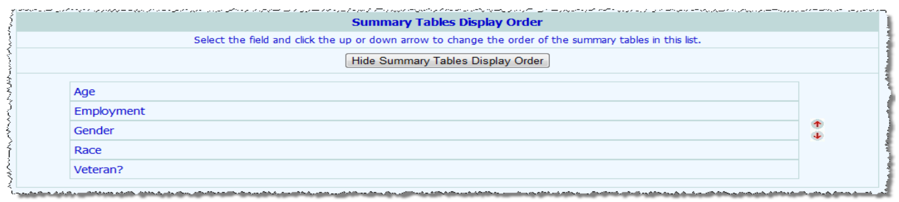
Record Count: 34

GENDER	EMPLOYMENT	VETERAN?			
		-No Data-	Don't Know	No	yes
Female	-No Data-	5	0	4	0
	Employed	0	0	1	0
	Unemployed	0	0	4	0
	TOTAL	5	0	9	0
Male	-No Data-	9	0	5	0
	Employed	0	1	2	2
	TOTAL	9	1	7	2
Transgendered Male to Female	-No Data-	1	0	0	0
	TOTAL	1	0	0	0

The default value is "Columns."

This option is only applicable when one or more "Grouped By" selections have been made.

7. To adjust the order in which the summary tables are displayed on the report, click **Show Summary Tables Display Order** to make additional summary table-related options available on the page as shown here.



This option is only applicable when more than one summary table is available for inclusion in the report.

8. To adjust the order of the summary tables on the report page, click a characteristic in the "Summary Tables Display Order" portion of the page to highlight it. Drag and drop the highlighted characteristic into the desired list position, or use the up and down arrow icons to the right of the list to move the characteristic up or down.

The process of setting the summary table report options is now complete.

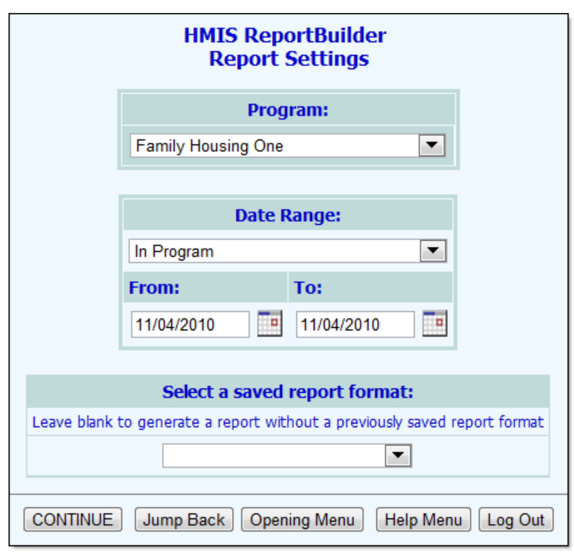
VIEWING OR UPDATING AN EXISTING REPORT

To view or make changes to an HMIS ReportBuilder report for which there is a previously saved report format, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Profile**. The *Consumer/Program Profile* menu page is displayed.

2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run or updated, or select a group of programs using one of the available "All" selections.

3. Click **HMIS ReportBuilder**. The *Report Settings* page is displayed.



This page contains date range selections, as well as a list of any saved report formats to which you have access.

4. Click the **Date Range** drop-down arrow and choose which consumers are to be included in the report based on their

program history. Available selections are:

IMPORTANT! *In all instances household members of clients are included in the report when those clients meet the criteria specified here and in step 5.*

- **In Program –** When this option is selected the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. This selection is recommended if you will be narrowing the report contents using multiple date range filters (set in step 11 below).

  In this context, clients who were enrolled in the program include those who entered the program on or before the report "To" date, those who were discharged from the program on or after the report "From" date, and those who were enrolled in the program for the entirety of the report period.

- **Admissions –** When this option is selected the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range.

- **Discharges –** When this option is selected the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be included.

5. By default, the report only looks for clients with program histories (of the type specified in the previous step) for today's date. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format).

6. Click the **Select a saved report format:** drop-down arrow and select the report format to be updated or to be used to view an HMIS ReportBuilder report. The page is refreshed to include an option for modifying the settings of the selected format if desired.

   To create a new HMIS ReportBuilder report for which a format has not yet been saved, or to view a single-use report, see "Generating a New Report" on page 2.

7. To modify the settings of the selected format before viewing a report using that format, or to delete the report format entirely, click the **Provide option to modify settings of saved report format** check box and skip ahead to step 10.

   Only the user who originally saved the report format and individuals who can save reports for all staff can modify or delete that format. Others can save modified report formats under a new name, but cannot apply changes to the original format.

   To view a report using the selected report format *without* first modifying the settings of that format, leave the check box unchecked and continue with step 8.

8. Click **CONTINUE**. The HMIS ReportBuilder report is generated and displayed on the *HMIS ReportBuilder* page.

   When working with the report data, please keep in mind that:

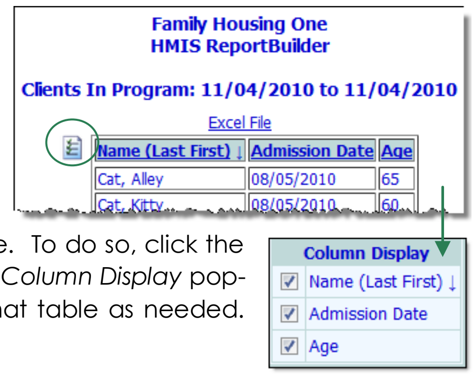
   - *The report shows the values for each characteristic as of the date on which the report is generated. For example, if a client's marital status on his or her date of intake was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the client's intake date.*

   - *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each client or household member includes a list of the characteristic values separated by commas. Additionally, because each client or household member* *may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total record count for the report.*

- *If a report's results include fewer than 5,000 records, the data comes from the live database. If the report's results include more than 5,000 records, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. The number of records included in the report, and the link to the data file (if applicable), is displayed on the report page.*

9. Once the report is displayed, complete any of the following tasks as needed:

- **Show/hide individual detail or summary table columns –** In some cases you may have chosen to include a program, client, or household member characteristic in the report for filtering purposes, but do not necessarily want to see it included in the individual detail table. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page. To do so, click the show/hide icon to the left of the table you would like to alter. The *Column Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed. Checked columns are displayed, unchecked are hidden.



Showing/hiding columns of individual detail or summary tables does not impact the contents of the Excel File version of the report data.

- **Sort individual detail or summary table contents –** Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press **<SHIFT>** and click on the second column heading.

An ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↑) or descending (↓) order. In this example, the table is being sorted alphabetically by client/household member name from A to Z.

Changing the sort order of an individual detail or summary table overrides any sorting for those tables specified in the report settings or in a saved report format. However, such changes do not impact the contents of the Excel File version of report data, nor are they saved when a report format is saved.

- **Print the report –** To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.

- **Export the contents to Microsoft Excel –** To do so, click the **Excel File** link at the top of the page.

The process of viewing an existing HMIS ReportBuilder report is now complete. The steps that follow apply only when modifying an existing report's settings following step 7.

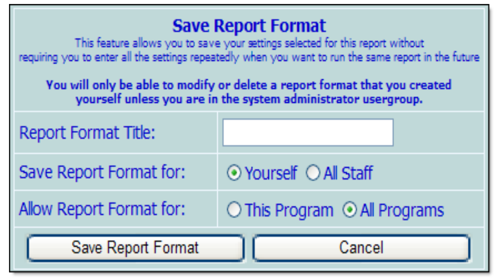
10. Click **CONTINUE**. The *Report Options* page is displayed.

11. Make changes to the settings on this page if needed.

12. Click **CONTINUE**. The *Report Options – Continued* page is displayed.

13. Make adjustments to the settings on this page if needed.

Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various ReportBuilder options see "Understanding HMIS ReportBuilder Options" on page 6.



14. To save any changes made to the report format in steps 10 and/or 12, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

    To view the modified report without saving the settings changes, skip ahead to step 18.

    *If the selected report format is one you originally created, or if you have the ability to save report formats for all users, you also have the option to delete the format entirely at this time. To do so, click **DELETE REPORT FORMAT** then complete the process by clicking **OK** on the confirmation dialog box that is subsequently displayed.*

15. The **Report Format Title** defaults to the name of the selected report format. To save the modified report format as a *new* format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

    Only the user who originally saved a report format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

16. Make changes to the **Save Report Format for** and **Allow Report Format for** options as necessary.

17. Click **Save Report Format**. If the "Report Format Title" field contained the title of the original report format, the modifications are applied to that format. If the field contained a new title, the original format is left as is, and a new format is saved with the selected settings.

    If you do not have the authority to modify the report format and you did not change the report format title before clicking save, you will be prompted to do so now.

    The *Report Options – Continued* page is re-displayed.

18. Click **DISPLAY REPORT**. The report is generated and displayed on the *HMIS ReportBuilder Report* page.

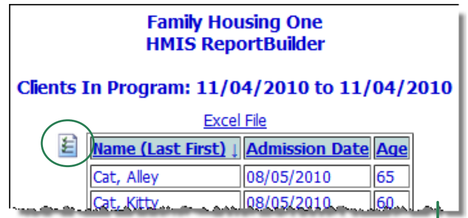
    When working with the report data, please keep in mind that:

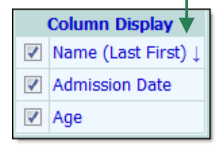
    - *The report shows the values for each characteristic as of the date on which the report is generated. For example, if a client's marital status on his or her date of intake was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the client's intake date.*

    - *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each client or household member includes a list of the characteristic values separated by commas. Additionally, because each client or household member may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total record count for the report.*

    - *If a report's results include fewer than 5,000 records, the data comes from the live database. If the report's results include more than 5,000 records, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. The number of records included in the report, and the link to the data file (if applicable), is displayed on the report page.*

19. Once the report is displayed, complete any of the following tasks as needed:



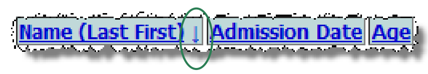


- **Show/hide individual detail or summary table columns –** In some cases you may have chosen to include a client characteristic in the report for filtering purposes, but do not necessarily want to see it included in the individual detail table. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page. To do so, click the show/hide icon to the left of the table you would like to alter. The *Column Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed. Checked columns are displayed, unchecked are hidden.

  Showing/hiding columns of individual detail or summary tables does not impact the contents of the Excel File version of the report data.

- **Sort individual detail or summary table contents –** Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press **<SHIFT>** and click on the second column heading.

  An ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↑) or descending (↓) order. In this example, the table is being sorted alphabetically by client/household member name from A to Z.



  Changing the sort order of an individual detail or summary table overrides any sorting for those tables specified in the report settings or in a saved report format. However, such changes do not impact the contents of the Excel File version of report data, nor are they saved when a report format is saved.

- **Print the report –** To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.

- **Export the contents to Microsoft Excel –** To do so, click the **Excel File** link at the top of the page.

- **Save the format of the report for future use if you have not already done so –** To do so, click the Internet browser's **Back** button to return to the *Report Options – Continued* page, and then complete steps 14 through 17 above.

The process of viewing or updating an existing HMIS ReportBuilder report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the HMIS ReportBuilder feature can be a useful reference when you have your own questions about the functionality.

ARE THE HMIS REPORTBUILDER REPORT CONTENTS LIMITED TO INFORMATION FOR ACTIVE CLIENTS?

Which clients (and their household members) are included in the report contents is based on the program history type chosen on the initial report settings page using the **Date Range** selection option. Specifically, when "In Program" is chosen, the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. When "Admissions" is chosen the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range. And when "Discharges" is chosen the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be included.

WHO CAN SAVE REPORT FORMATS FOR OTHER USERS?

In a single-agency AWARDS database, members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by other agency users. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

WHY AREN'T ALL SELECTED CHARACTERISTICS AVAILABLE AS SUMMARY TABLE OPTIONS?

In the summary tables portion of the second page of report settings (the page viewed after the report variables have been selected), the check boxes list is comprised of the program, client, and household member characteristics selected on the previous *Report Options* page; however, several characteristic data fields are not available for selection as part of a summary table, regardless of whether they were selected on the previous page. For example, name (first, last, middle, and alias), date of birth, and client ID. These characteristics are excluded because they have values that are unique to each individual, and as such are unlikely to generate any meaningful summary data.

WHY DO FUNCTIONS SUCH AS "COUNT" NOT WORK WHEN VIEWING SUMMARY TABLE INFORMATION IN EXCEL?

Those cells in the Excel version of the HMIS ReportBuilder report for which functions will not work are noted as such with a green triangle in the top right corner. If you click on a cell that has one of these green triangles in it, an exclamation point is displayed. Click the exclamation point for an explanation of why the function is not available. In the case of the summary portion of the HMIS ReportBuilder report the functions such as "count" do not work in many cases because the number values are stored as text rather than numbers.

The summary information included in the HMIS ReportBuilder report is provided so that the types of manual calculations that can be completed using Excel functions are unnecessary. In the event that a manual calculation is still required, you will need to convert the text values to numbers. To do so, click the exclamation point mentioned above and select the corresponding option.

WHY DO TO THE "CHILDREN DETAIL" VARIABLES NOT CORRECTLY IDENTIFY HOW MANY CHILDREN A CLIENT HAS?

The "Children Detail" information (ages and gender) is pulled from the client's intake record, not his or her household information form. As a result, if two children were recorded for the client at intake, only those two children are included under "Children Detail" in the HMIS ReportBuilder report, regardless of how many were entered on the household information form. If the child detail information entered at intake is incorrect, it can be corrected by opening the client's intake form within the Intake/Admission module and making the changes there.

WHY DOESN'T MY REPORT YIELD ANY RESULTS WHEN I APPLY A DATE FILTER?

When filtering on a date be sure that the date is entered using mm/dd/yyyy format. If a different format is used the report filter will not work properly.

WHY DON'T I SEE THE "ADD ADDITIONAL FILTERS" LINK?

If the add additional filters link is not displayed, it is an indication that you have reached the maximum number of filters for a given report – eight. No additional filters can be added in such cases, and so the link is hidden.

WHY IS A CHANGE I MADE TO A CLIENT'S RECORD NOT IMMEDIATELY REFLECTED IN THE REPORT?

There are two possible causes when HMIS ReportBuilder reports are not immediately displaying information updated in the same database login session. First, it may be indicative of a memory cache issue. To get around this, press **<CTRL+R>** while viewing the report page, or click your browser's refresh icon.

Second, if a report's results include fewer than 5,000 records, the data comes from the live database and should reflect what's currently in client and household member records. If the report's results include more than 5,000 records, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. As a result, any changes made to records between the time of the backup and when the report was run will not be reflected in the report data.

WHY ISN'T INDIVIDUAL DETAIL OR SUMMARY TABLE SORTING I DO ON THE REPORT PAGE REFLECTED IN THE EXCEL VERSION OF THE REPORT?

Changing the sort order of an individual detail or summary table on the report page overrides any sorting for those tables specified in the report settings or in a saved report format. However, the functionality is designed so that such changes do not impact the contents of the Excel file version of report data, nor are they saved when a report format is saved. If it is necessary to sort the data in the Excel file, Excel has extensive sorting functionality for that purpose.