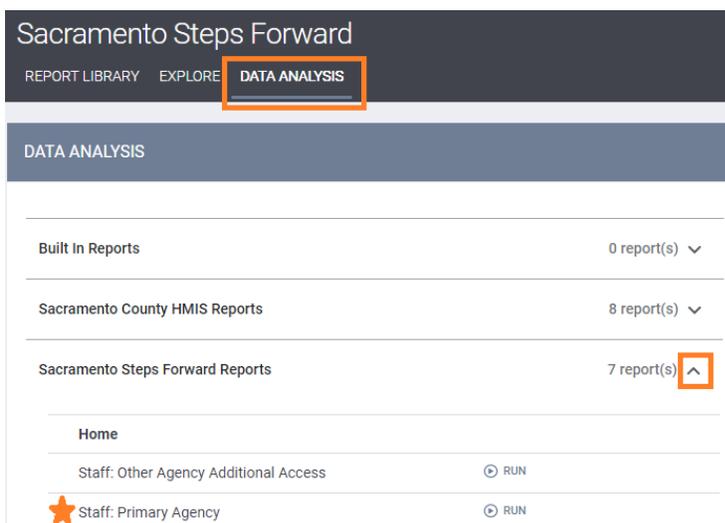HMIS Job Aid

Staff: Primary Agency Report

Staff: Primary Agency Reports should be run monthly to ensure that your agency does not have any staff that have the incorrect agency access in HMIS. These reports can be run by HMIS End Users with Supervisory, or Administrative level access.

How to Find the Report

To find these reports, first click on the launch pad (aka waffle) on the top right of the screen and then choose "Reports".


While the canned reports are all located in the Report Library, all custom reports created for your agency live in the Data Analysis section. Click the carrot on the right to open up the reports for your specific agency and you will find all five of the ROI reports. You will need to run each one separately to check for any ROI errors.

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STEPS FORWARD

Running the Report

Unlike canned reports, the custom reports run automatically. They will take a moment to load as they run, so please be patient. When they load, they will load the visualization of the data. While this can be useful for other reports, for this data it does not provide much information. Using the carrots next to the titles, you can close the visualization tab and open up the data tab to see the data table itself.
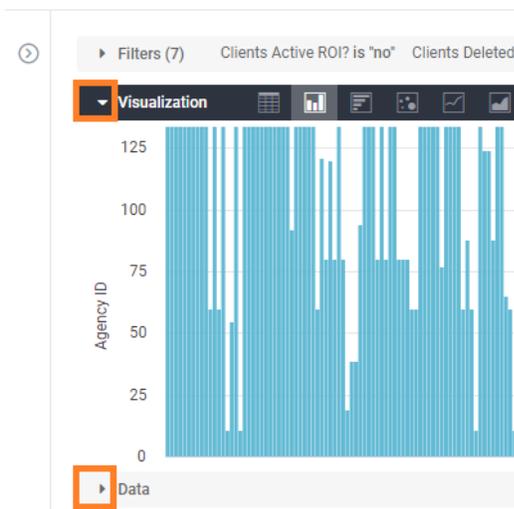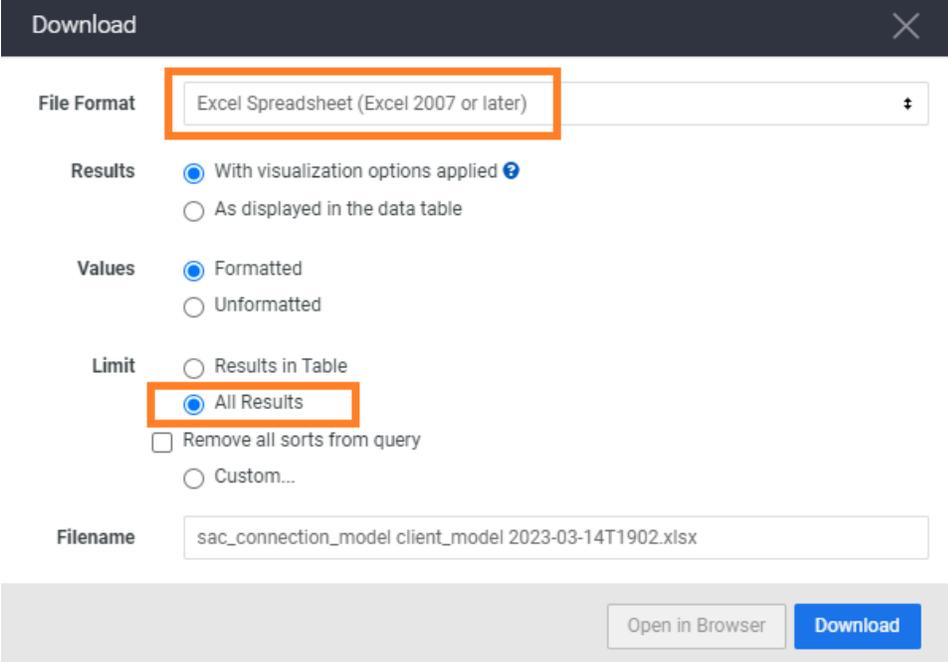

To download the data, simply click on the gear on the top right corner of the screen and choose download.
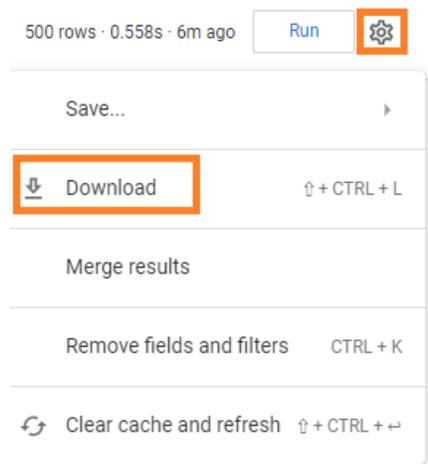
Saving the Report

The Download dialogue box has several options that need close attention. Most importantly, we are looking at the file format and the limit. As you can see, we recommend downloading an excel document, though there are a collection of other options. The custom reports also have a limit within the system. The default row limit is 500 lines, but many reports will have more data. Always click "All Results" as the Limit option to make sure you receive all of the data from the report. You do not need to change the file name here in this box, as it will give you another opportunity as soon as you click "Download".