



# Program-Based Reports Running Reports and Shortcuts Tuesday, July 23, 2024



# Today's Training Team



Angie Evans  
Bitfocus



Lesly Soto Bright  
Bitfocus



Leila Qureishi  
County: OSH



Marcell Leath  
San Jose



Nate Montgomery  
San Jose

# Overview - What Today's Training Will Cover

10:00am – 10:15am: Introductions (Lesly)

10:15am – 10:25am: Overview and Objectives (Lesly)

10:25am – 10:40am: Running a Program-based Report (Angie)

10:40am – 10:45am: Breakout Room Options (Angie)

10:45am – 10:55am: Zoom Room Assignments (Self-selected)

10:55am – 11:35am: Scenarios/Practicum

11:30am – 12:00pm: Debrief (Lesly)



# Objectives

- ☑ Attendees can run Program-based reports and export in Excel format
- ☑ Attendees learn 1 Excel trick to help them use the report





# Running a Program-Based Report

# Clarity System: Overview

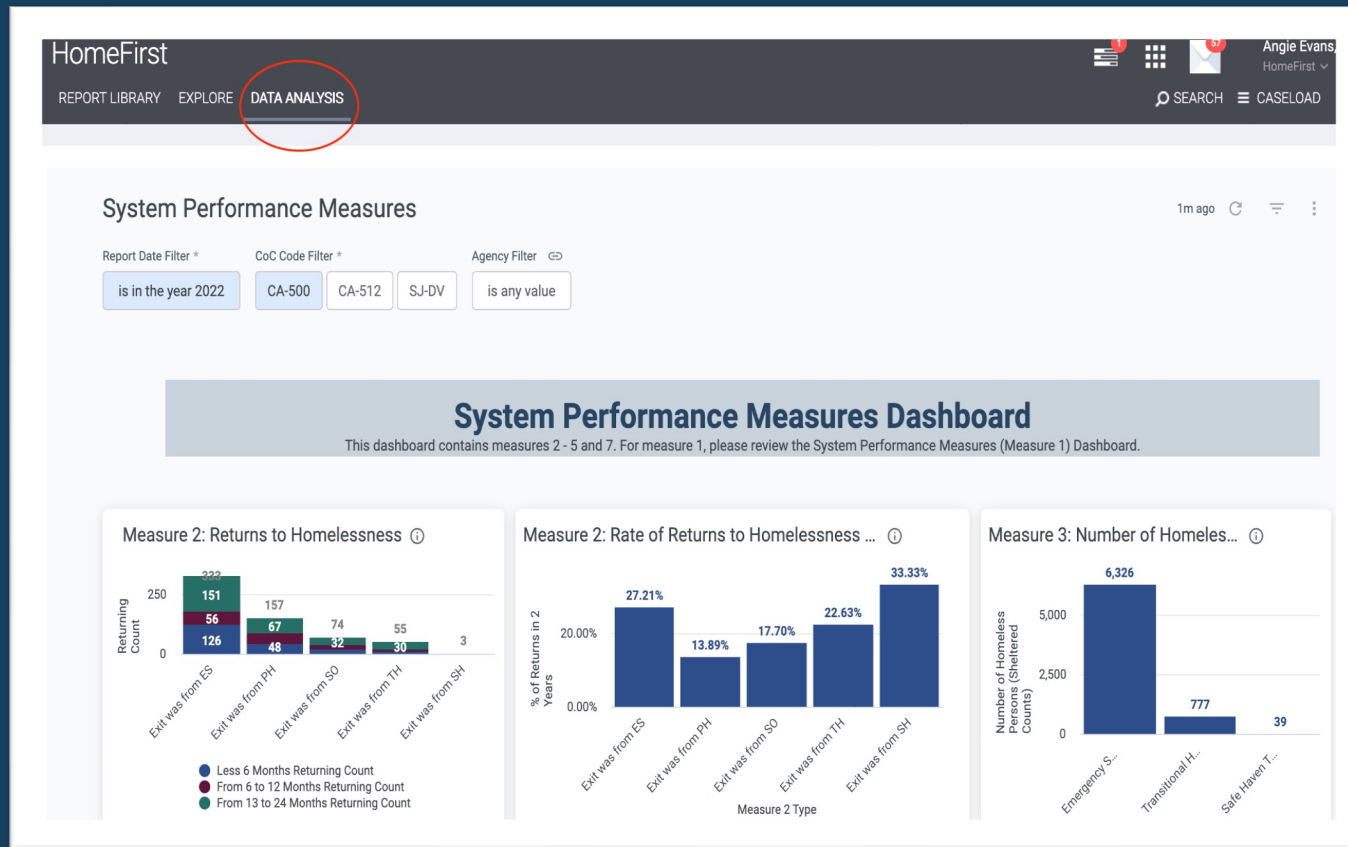


## Login To HMIS

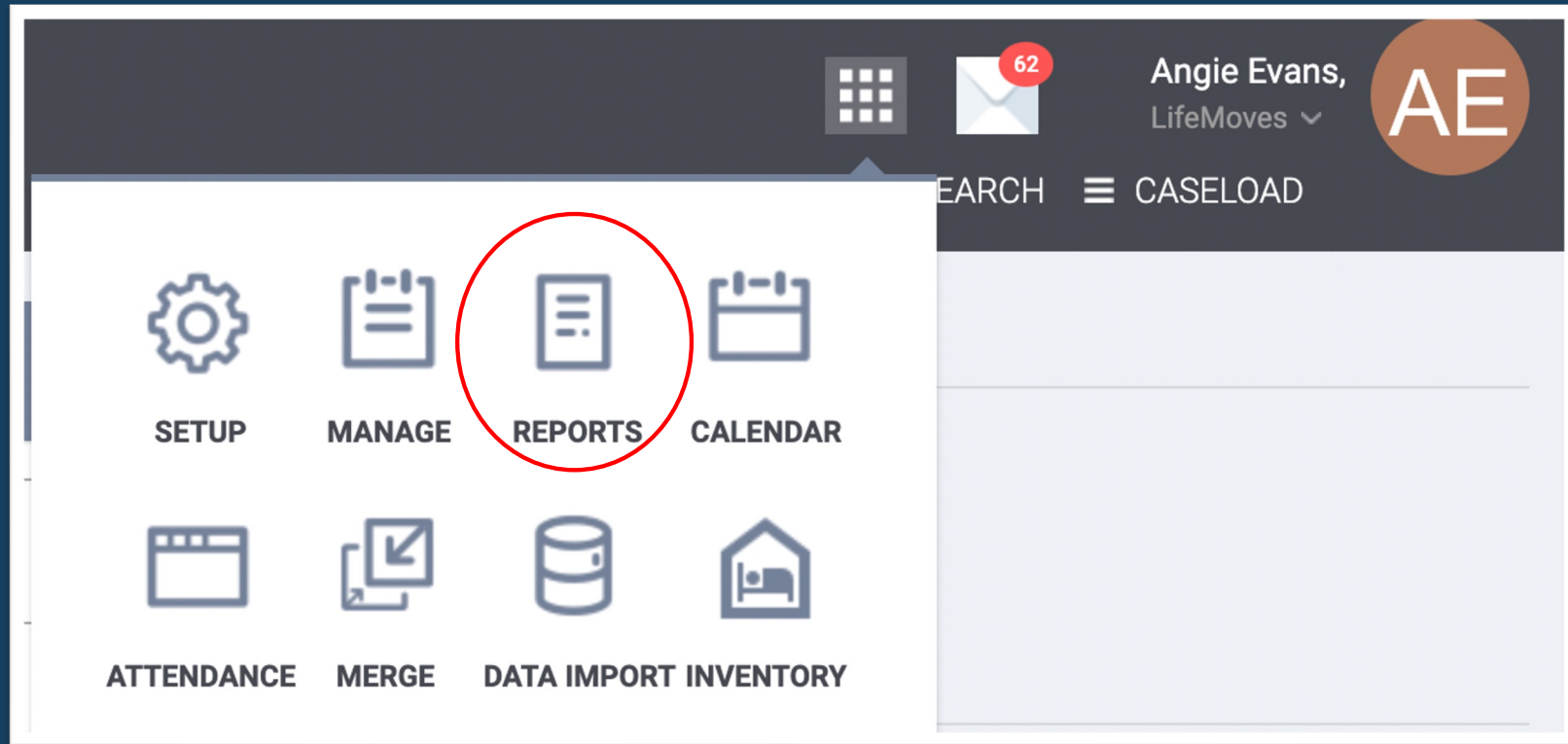
Login to the Santa Clara County  
Clarity Human Services HMIS here.



# Reporting & In-Depth Data Analysis



# Reporting: Finding the Report Library



# Reporting: Program Based Reports

LifeMoves

REPORT LIBRARYEXPLOREDATA ANALYSIS

62

Angie Evans,  
LifeMoves

AE

SEARCHCASELOAD

REPORT LIBRARY

Favorite Reports0 report(s) ▾

Data Quality Reports6 report(s) ▾

Administrator Reports30 report(s) ▾

Service Based Reports13 report(s) ▾

Program Based Reports23 report(s) ▲

[EMPL-101] Employment Report★ | ⏮ RUN | 📅 SCHEDULE | MORE INFO ▾

[EMPL-102] Employment / Education Report★ | ⏮ RUN | 📅 SCHEDULE | MORE INFO ▾

[EXIT-101] Potential Exits★ | ⏮ RUN | 📅 SCHEDULE | MORE INFO ▾

Processed Reports

No reports

Scheduled Reports

No reports

# Reporting: Program Based Reports

[GNRL-220] Program Details Report [2023]

★ | ⏮ RUN | 📅 SCHEDULE | LESS INFO ^



Program Details Report



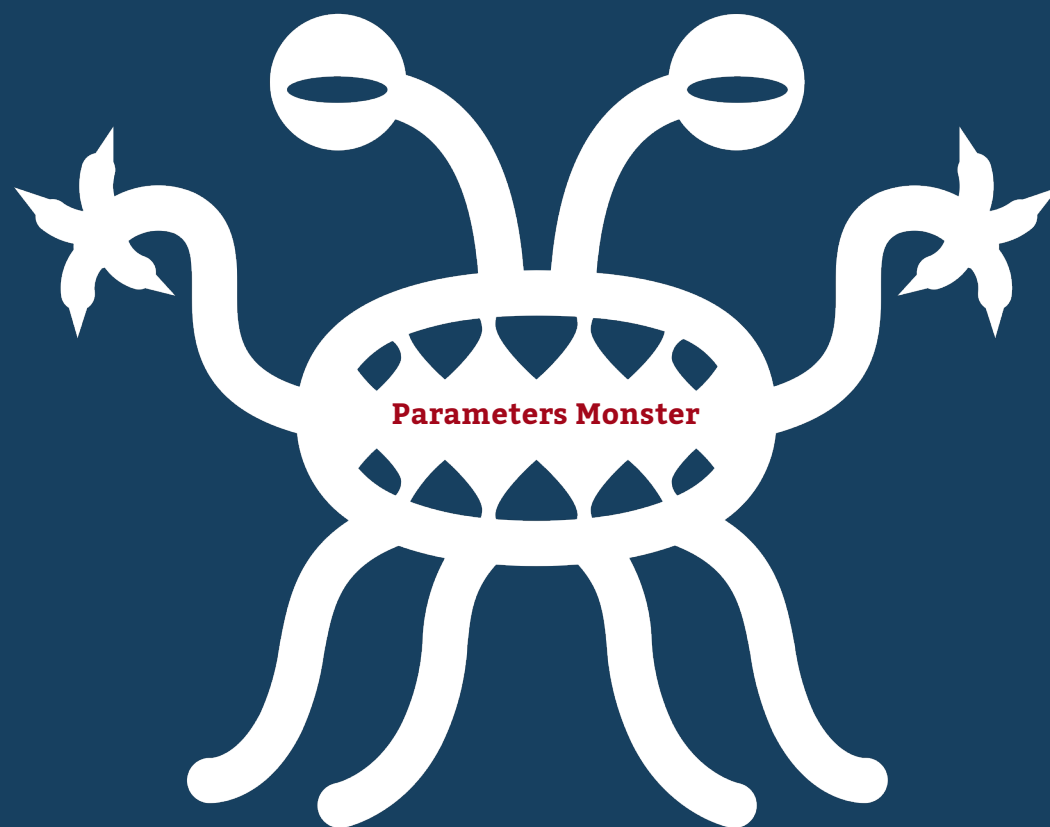
The screenshot displays the Bitfocus Clarity Human Services Help Center interface. At the top, the Bitfocus logo is on the left, and navigation links for 'Clarity Human Services Help Center', 'Go to bitfocus.com', 'Request Article Update', 'Go to Customer Portal', and 'Sign in' are on the right. Below the header is a search bar with the placeholder text 'Search for answers'. A breadcrumb trail reads 'Clarity Human Services Help Center &gt; Report Library &gt; Program-Based Reports'. On the left side, there is a list of links with right-pointing chevrons: '2024 Data Standards', 'News and Announcements', 'Clarity Human Services: INVENTORY', 'Clarity Human Services: Outreach', 'Coordinated Entry', 'Getting Started', and 'System Administration'. The main content area features the title '[GNRL-220] Program Details Report'. Underneath the title, there are sections for 'Description', 'Type of Report', and 'Purpose'. The 'Type of Report' section contains the text: 'This report is based on project enrollments. Clients without an enrollment will not be included in the Program Details Report'. The 'Purpose' section contains the text: 'The Program Details Report returns all the fields and corresponding responses for selected'.

# Running GNRL-220 Program Details Report

[GNRL-220] Program Details Report [2023]

★ |  RUN |  SCHEDULE | LESS INFO ^

Program Details Report



# Reporting: Running GNRL - 220

Program Based Reports > [GNRL-220] Program Details Report [2023]

**Project Type(s)**  
Choose...  
All  
Emergency Shelter – Entry Exit  
Emergency Shelter – Night-by-Night  
Transitional Housing

**Program Status**  
Choose... ▼

**Program(s)**  
Choose...

**Screen Type(s)**  
Choose...  
All Screens Data  
Entry Data  
Status Assessment Data  
Annual Assessment Data

**Enrollments**  
Active Enrollments ▼

**Report Date Range**  
\_/\_/\_ - \_/\_/\_

**Report Output Format**  
☒ Zip with XLSX

**SUBMIT**

## Parameters

*All these filters need to be entered to run the report*

# Reporting: Running GNRL - 220

Program Based Reports > [GNRL-220] Program Details Report [2023]

Project Type(s)

Choose...

All

Emergency Shelter – Entry Exit

Emergency Shelter – Night-by-Night

Transitional Housing

## Program Type

If you don't know,  
just select "All"

Select which Project Type(s) to include:

All, Single Select, or Multi-Select

*(Hold Control/Command or Hold Shift to select multiple options sequentially)*

# Reporting: Running GNRL - 220

Program Status	Choose...
Program(s)	Choose...

*(Hold Control/Command or Hold Shift to select multiple options sequentially)*

**Program Status** is whether the program is active during the reporting period you're looking at

**Program(s)** is the name of the program

# Reporting: Running GNRL - 220

Screen Type(s)

Status Assessment Data

Annual Assessment Data

Current Living Situation

Exit Data

Follow-Up Assessment Data

**Where do you want  
the data to come from?**



*“What would I choose if I want to see all the clients who were enrolled in the program during the reporting period?”*

## Knowledge Test

TRUE

FALSE

I can get a list of all the **Exit Destinations** from clients in my program by running the Program Details Report.

# Reporting: Running GNRL - 220



A screenshot of a web interface showing a dropdown menu. The menu has two visible options: 'Enrollments' and 'Active Enrollments'. The 'Active Enrollments' option is currently selected and highlighted with a light blue background. A small downward arrow icon is visible on the right side of the dropdown box.

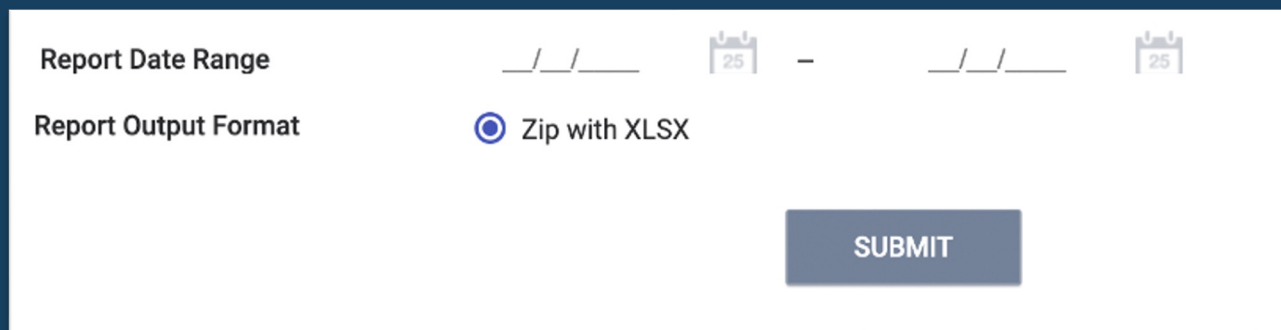
**Choose  
Enrollment type**

**Active Enrollments:** All the clients in your program during the reporting period

**OR**

**New Enrollments:** Any clients NEWLY enrolled during the reporting period

# Reporting: Running GNRL - 220



The screenshot shows a reporting interface with two main sections. The first section, 'Report Date Range', contains two date pickers separated by a minus sign, each with a calendar icon and the number '25'. The second section, 'Report Output Format', has a radio button selected next to the text 'Zip with XLSX'. A 'SUBMIT' button is located at the bottom right of the form area.

Report Date Range

Report Output Format

☒ Zip with XLSX

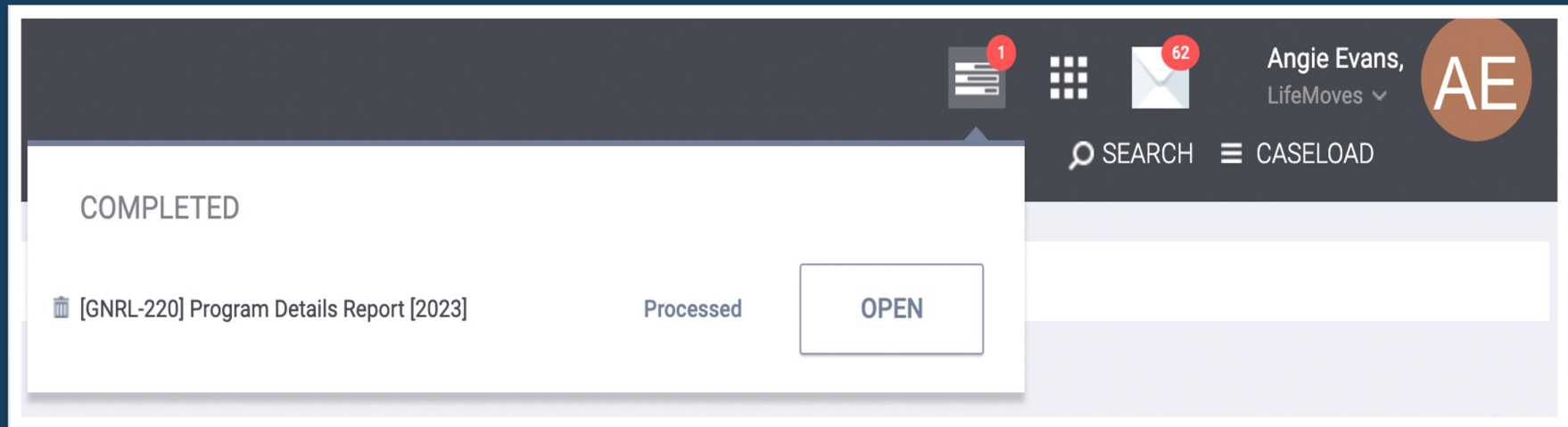
SUBMIT

Choose **Date Range**  
&  
click submit

Choose the reporting Date Range based on what information you need

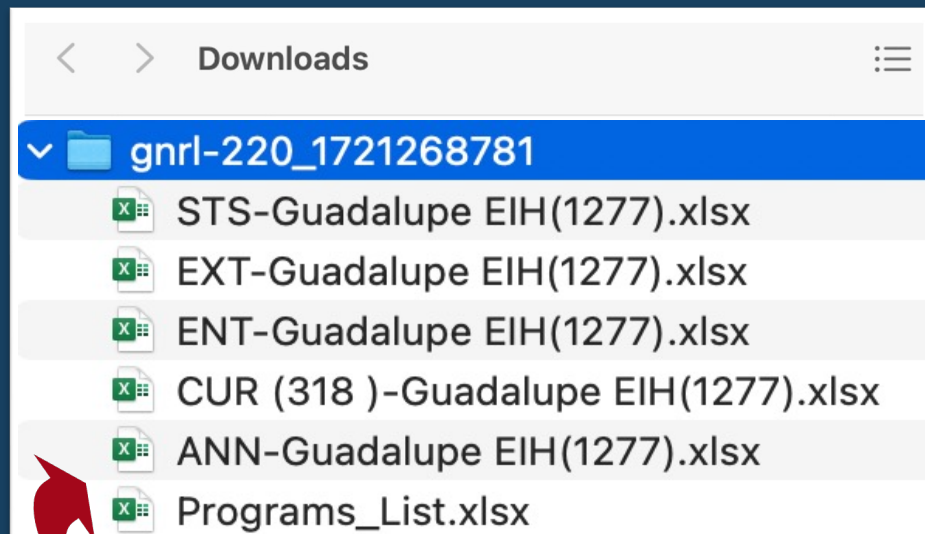
# Reporting: Running GNRL - 220

**Your report is ready!!**



The screenshot displays a software interface with a dark header bar. On the right side of the header, there are three icons: a document with a red '1' badge, a grid icon, and an envelope with a red '62' badge. To the right of these icons is the user's name 'Angie Evans, LifeMoves' with a dropdown arrow, and a circular profile picture with the initials 'AE'. Below the header, there is a search bar with a magnifying glass icon and the text 'SEARCH', followed by a 'CASELOAD' button with a hamburger menu icon. A white modal window is open in the center-left, titled 'COMPLETED'. Inside the modal, there is a trash can icon followed by the text '[GNRL-220] Program Details Report [2023]', the word 'Processed', and an 'OPEN' button.

# Reporting: Running GNRL – 220 - Export



STS = Status Screens  
EXT = Exit Screen  
ENT = Enrollment Screen  
CUR = Current Living Situation  
ANN = Annual Assessment

All the Program Names included in the report

# Included Fields: By Screen



Field Name	Entry	Status	Annual	Current Living	Exit	Follow-up
Unique ID	X	X	X	X	X	X
First Name	X	X	X	X	X	X
Last Name	X	X	X	X	X	X
Agency	X	X	X	X	X	X
Assigned Staff	X	X	X	X	X	X
Staff Created	X	X	X	X	X	X
Enrollment Start Date	X	X	X	X	X	X
Enrollment Exit Date	X	X	X	X	X	X
Chronic Homeless	X	X	X	X	X	X
Bed Night Service	X	X	X	X	X	X
Bed Night Service Start Date	X	X	X	X	X	X
Bed Night Service End Date	X	X	X	X	X	X
DoB	X	X	X	X	X	X
Unit Assignment	X				X	
Bed Assignment	X				X	
Occupancy Start Date	X				X	
Occupancy End Date	X				X	
SSN	X	X	X	X	X	X
Personal ID	X	X	X	X	X	X
Household ID	X	X	X	X	X	X
Gender	X	X	X	X	X	X
Race and Ethnicity	X	X	X	X	X	X
Veteran Status	X	X	X	X	X	X
All fields included on the selected screen	X	X	X	X	X	X



If requested, could you run a Program  
Details Report today?



# Breakout Room Options

# Self-Selected Breakout Rooms (40 Mins)

## **Breakout Group 1**

**Marcell**

- How to create filters and find duplicates in Excel (Marcell)

## **Breakout Group 2**

**Nate**

- Creating a Pivot Table to identify demographics in Excel (Nate)

## **Breakout Group 3**

**My**

- Working with Formulas in Excel (My)

## **Breakout Group 4**

**Leila**

- Using V-Lookup in Excel to identify VI-SPDAT data for your clients (Leila)

## Reference Sheet

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**Breakout Group 1:** How to create filters and find duplicates in excel (Marcell)

**Cheat Sheet and file to follow along:**

[https://drive.google.com/drive/folders/1PR\\_uXoLg38YFyOFjKJMOFQbk8YiRcg-U?usp=sharing](https://drive.google.com/drive/folders/1PR_uXoLg38YFyOFjKJMOFQbk8YiRcg-U?usp=sharing)

**Software used:**

- Clarity's Report Library
- Microsoft Excel

## How to create filters and find duplicates in excel

- ☐ Download basic canned report data in Excel format
- ☐ Task 1: Sort and Filter one column using the Filter option in the Data tab
- ☐ "Clear" your filters to do next task
- ☐ Task 2: Select Conditional Formatting and highlight "Duplicate Values" in your dataset

## Reference Sheet:

**Breakout Group 2:** Creating a Pivot Table to identify demographics in excel (Nate)

**Cheat Sheet to follow along and File Example:**

<https://drive.google.com/drive/folders/1cc7-MkE4I3DFnuHEMt08p8fH6RvGxKUj?usp=sharing>

**Software used:**

- Clarity's Report Library
- Microsoft Excel

## Creating a Pivot Table to identify demographics in excel

### Summary of steps:

- ☐ Run [GNRL-220] Program Details Report in Excel format (*or use Nate's example file today*)
- ☐ Open enrollment data file. The file name will start with "ENT".
- ☐ Insert Pivot Table into a new sheet and create a count of how many clients identified as each gender type

## Reference Sheet:

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**Breakout Group 3 (advanced):**  
Working with Formulas in Excel  
(My)

**Cheat Sheet to follow along:**  
<https://drive.google.com/drive/folders/1MlzAPstMaGsgywi9vyOZBlzTzFYicPAo?usp=sharing>

### Software used:

- Clarity's Report Library
- Microsoft Excel



# Working with Formulas in Excel

## Formulas you will learn about

Trim	
Xlookup	
Vlookup	
Count	
Sum	
Average	Bonus Material!
Min	Bonus Material!
Max	Bonus Material!
Median	Bonus Material!

## Reference Sheet:

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**Breakout Group 4 (advanced):**  
Using V-Lookup to identify VI-SPDAT data for your clients  
(Leila)

**Cheat Sheet to follow along:**  
<https://drive.google.com/drive/folders/1bJ8MhRPWs6QJYL3SPKIZcTgUvBGkWY-F?usp=sharing>

### Software used:

- Clarity's embedded or standalone Looker (\*Access to Data Analysis required\*)
- Microsoft Excel



## Using V-Lookup to identify VI-SPDAT data for your clients

### Summary of steps:

- ☐ Run report in Looker
- ☐ Download in excel format
- ☐ Use V-Lookup to ID clients who have completed or not completed the VI-SPDAT and see info about the assessment

## Folder with Cheat Sheets & Sample Data Files

[https://drive.google.com/drive/folders/1NXIBqppqogUNAfl9erLzVrI-IDF\\_bG-BW?usp=sharing](https://drive.google.com/drive/folders/1NXIBqppqogUNAfl9erLzVrI-IDF_bG-BW?usp=sharing)

# Self-Selected Breakout Rooms (40 Mins)

## **Breakout Group 1**

**Marcell**

- How to create filters and find duplicates in Excel (Marcell)

## **Breakout Group 2**

**Nate**

- Creating a Pivot Table to identify demographics in Excel (Nate)

## **Breakout Group 3**

**My**

- Working with Formulas in Excel (My)

## **Breakout Group 4**

**Leila**

- Using V-Lookup in Excel to identify VI-SPDAT data for your clients (Leila)

# Feedback



# Feedback Survey:

<https://s.zoom.us/m/bPvCgBYpq>



# Resources



# Resources

Contact Information	Type of Assistance
<b>scc-admin@bitfocus.com</b>	Use this email to contact your sys. admin. team: Angie and Lesly
<b>sccsupport@bitfocus.com</b>	Use this email to contact the Help Desk. They can assist with almost everything, and if they can't they will loop your sys. admin. team.
<b>help.bitfocus.com</b>	Use this to get help on all things HMIS. Type in your question in the search bar and get articles and how to steps.
<b>scc.bitfocus.com</b>	Use this to get insight into all things SCC HMIS related. From New User Training, to Forms and Newsletters and so much more! If you have not already, you should bookmark this page.