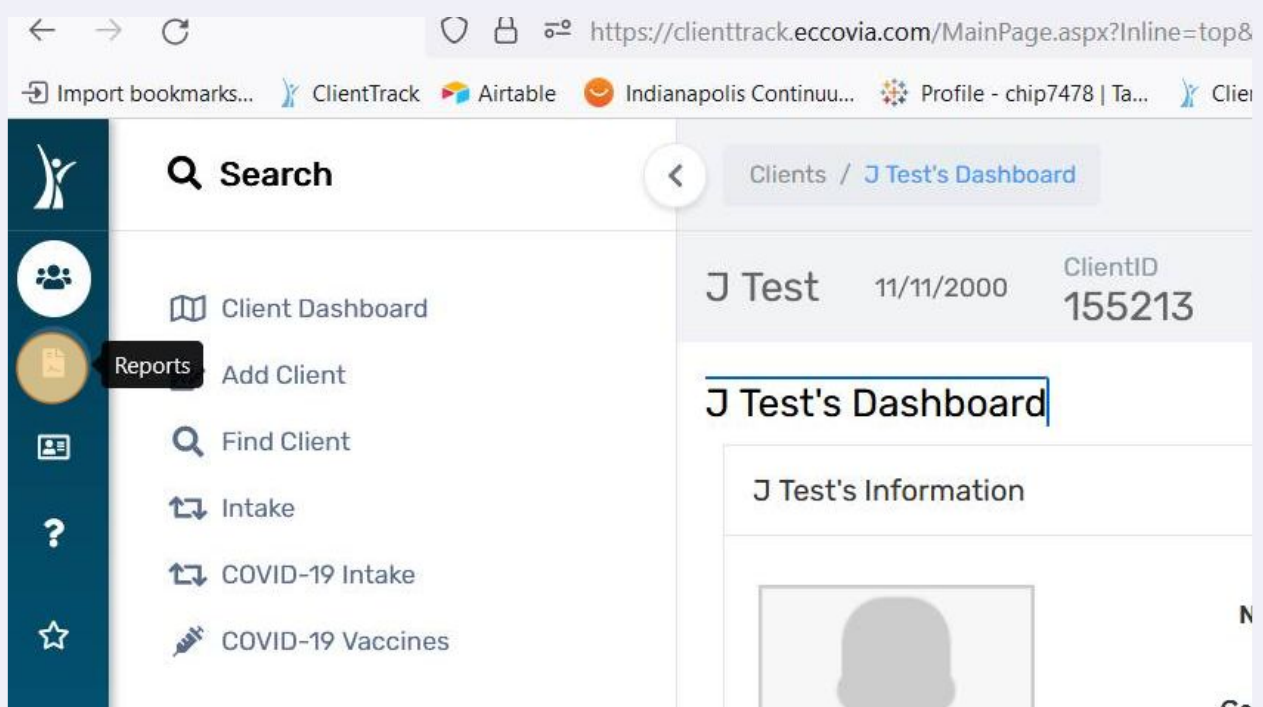


How to schedule a report and how to find it later

CE Extract timing out? Any other report in ClientTrack timing out? Want to schedule it later but you never know how to find it later?

1 Click "Reports"



2 Click on the report you want to run.

The screenshot shows a web application interface. On the left, a navigation menu lists several report categories: (2019), PATH Annual Report (2020), PATH Annual Report (2022), System Performance Measures (2020), **System Performance Measures (2022)** (highlighted with an orange circle), Administrative Reports, Enrollment Reports, and Service Reports. On the right, a panel titled 'Saved Report Settings' contains the text: 'To use saved report settings, select the de in the **Save As** field, select the report sett'. Below this text, the word 'Saved' is visible. At the bottom of the panel, there is a section labeled 'Measure to Run'. The browser's address bar at the bottom shows the URL: <https://clienttrack.eccovia.com/MainPage.aspx?Inline=top&SecondaryKey=&PrimaryKey=#mo3388>

3 Fill out of the info with whatever you want to pull

The screenshot shows the configuration page for the 'System Performance Measures Report'. The page title is 'System Performance Measures Report'. Below the title, there are navigation icons. The main heading is 'System Performance Measures Report'. A dropdown menu labeled 'Measure: *' is set to '-- SELECT --' (highlighted with an orange circle). Below this, there is a note: 'd for this report. Only records that fall within the date range you select will be included.' At the bottom, there are two date range selection fields: 'Predefined Date Range:' set to 'Previous Fiscal Year' and 'Service Date Between: *' set to '10/01/2020' and '09/30/2021'.

4 Once filled out, click "Schedule Report"

RZ - Day Shelter - DS - CoC
G - Day Shelter - DS

HMIS implementations with only one CoC do not need to do so).

d of household CoC or (if that is blank) then this location must match one of the CoC locations

3 - Indianapolis CoC

Report Schedule Report Cancel

71°F Sunny 8:53 AM 8/2/2022

5 Click "Now"

System Performance Measures (19)

TH Annual Report (2020)

TH Annual Report (2022)

System Performance Measures (20)

System Performance Measures (2022)

Administrative Reports

ment Reports

ce Reports

CoC F

You m

Note:

If spec

identi

Once Start Date * 08

Daily Start Time * 11:

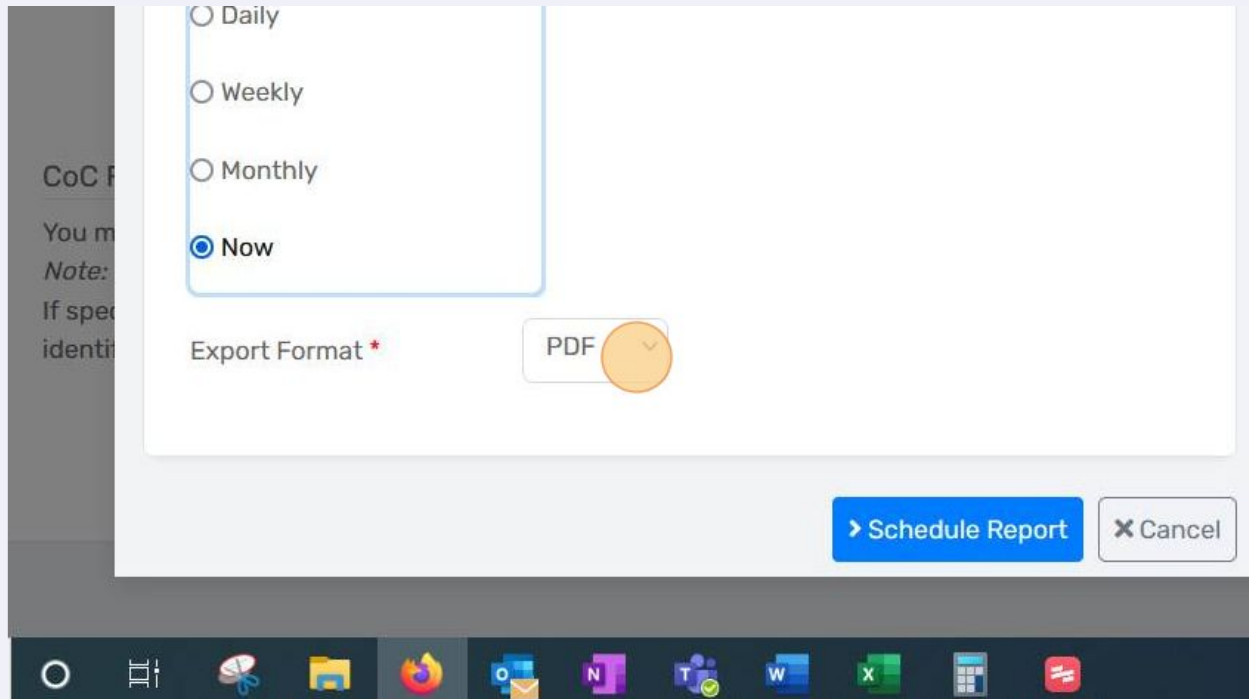
Weekly

Monthly

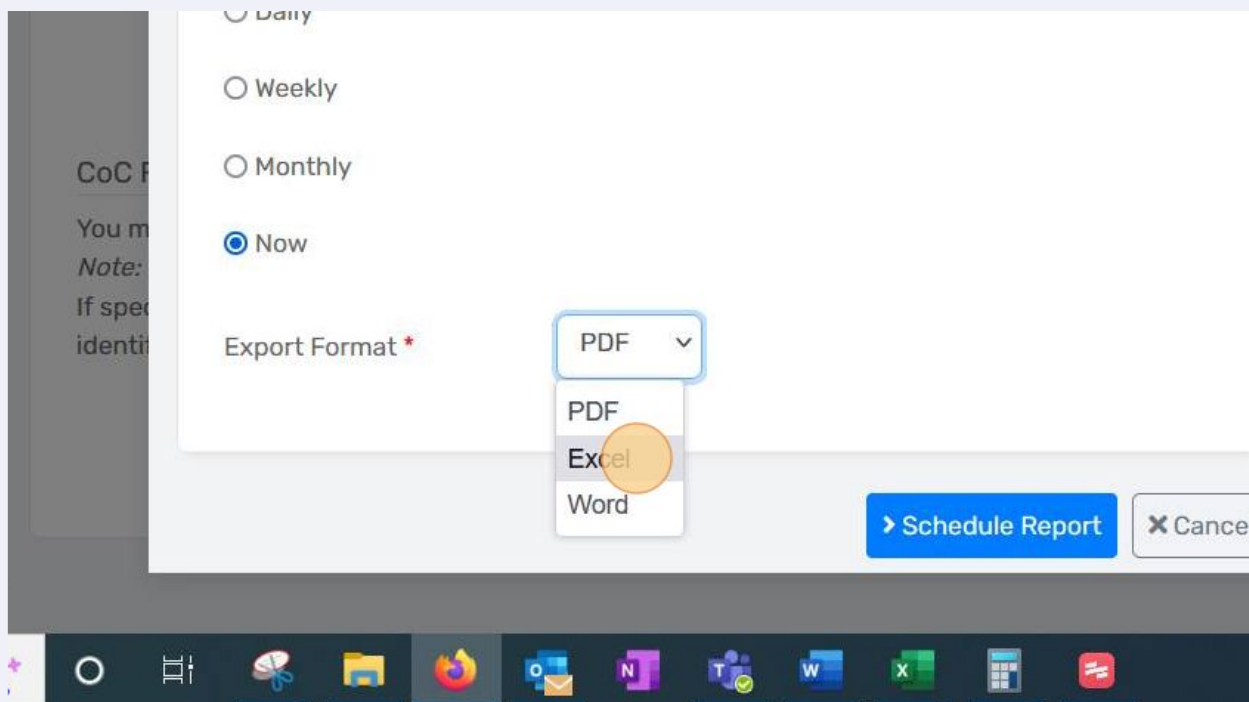
Now

Export Format * PDF

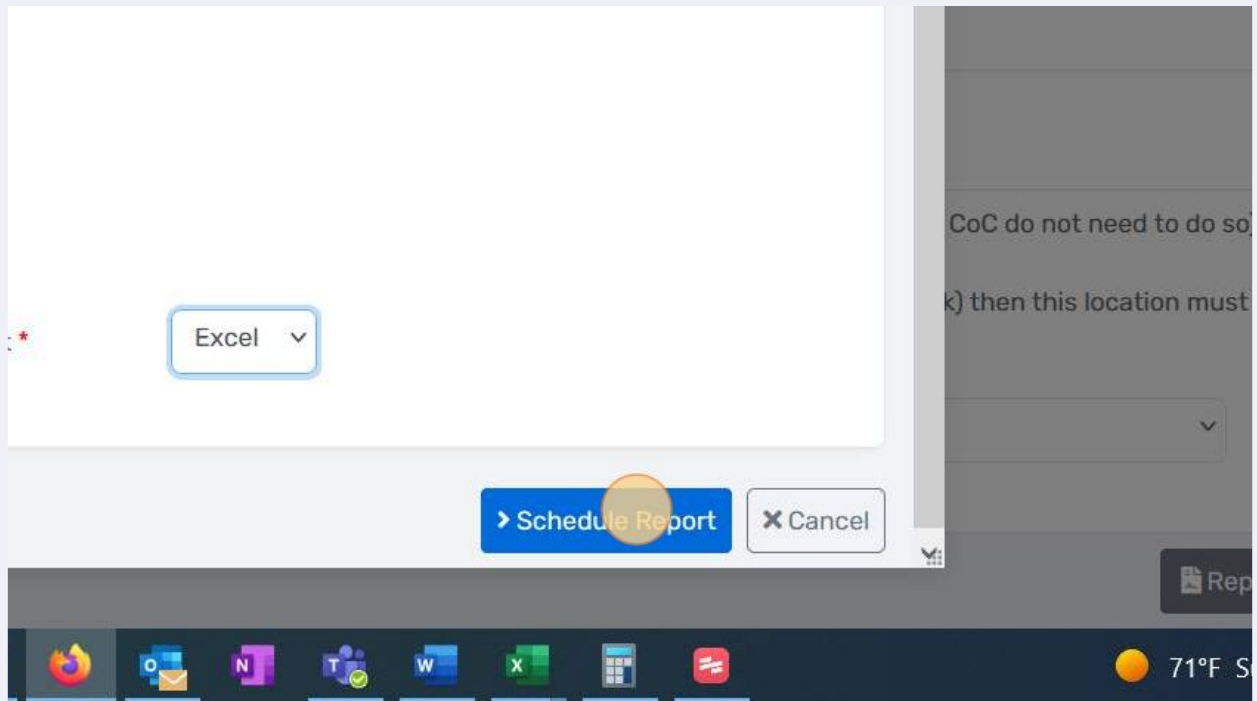
6 Choose the format you'd like (Excel usually works best)



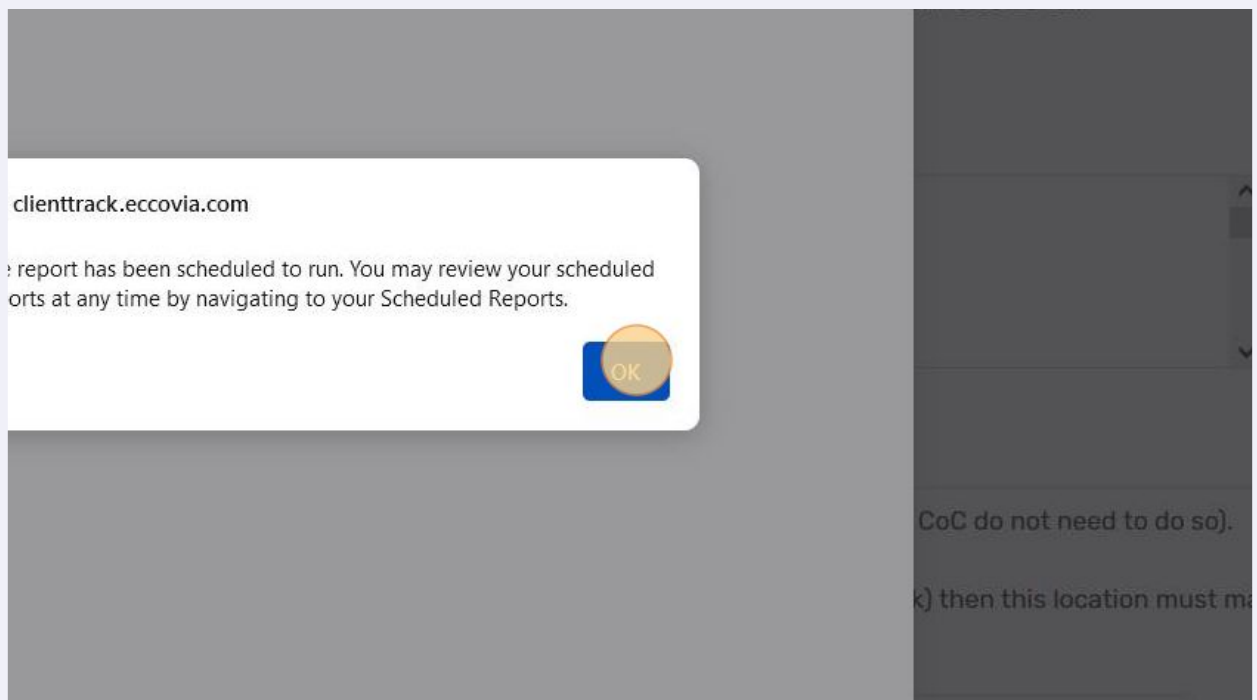
7 Click "Schedule Report"



8 Click "Schedule Report"

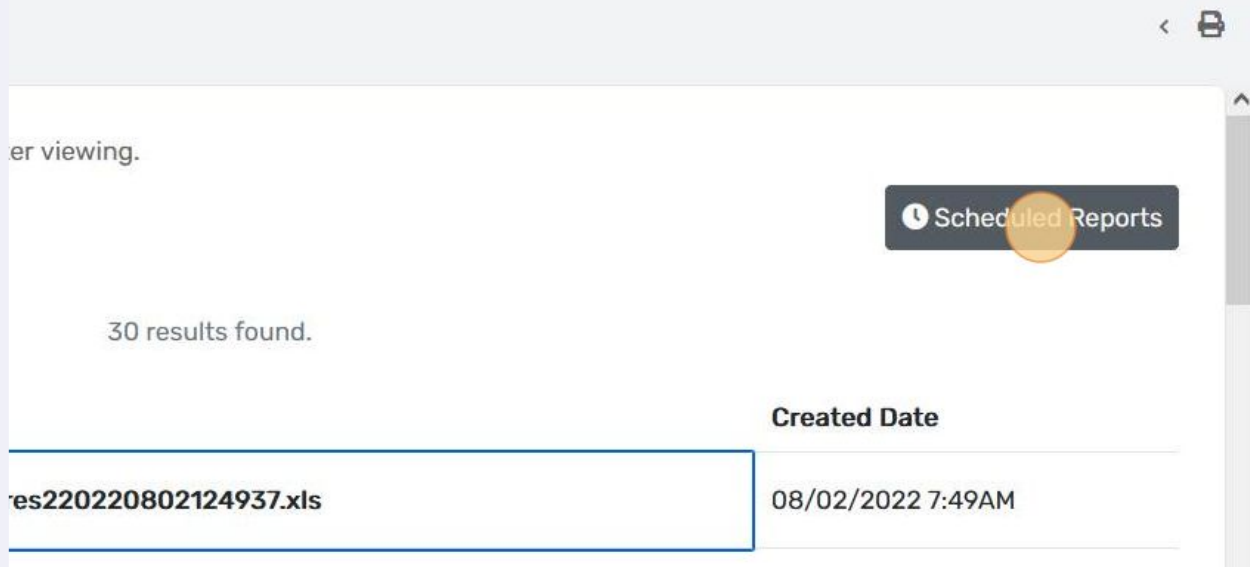


9 Click "Main content"



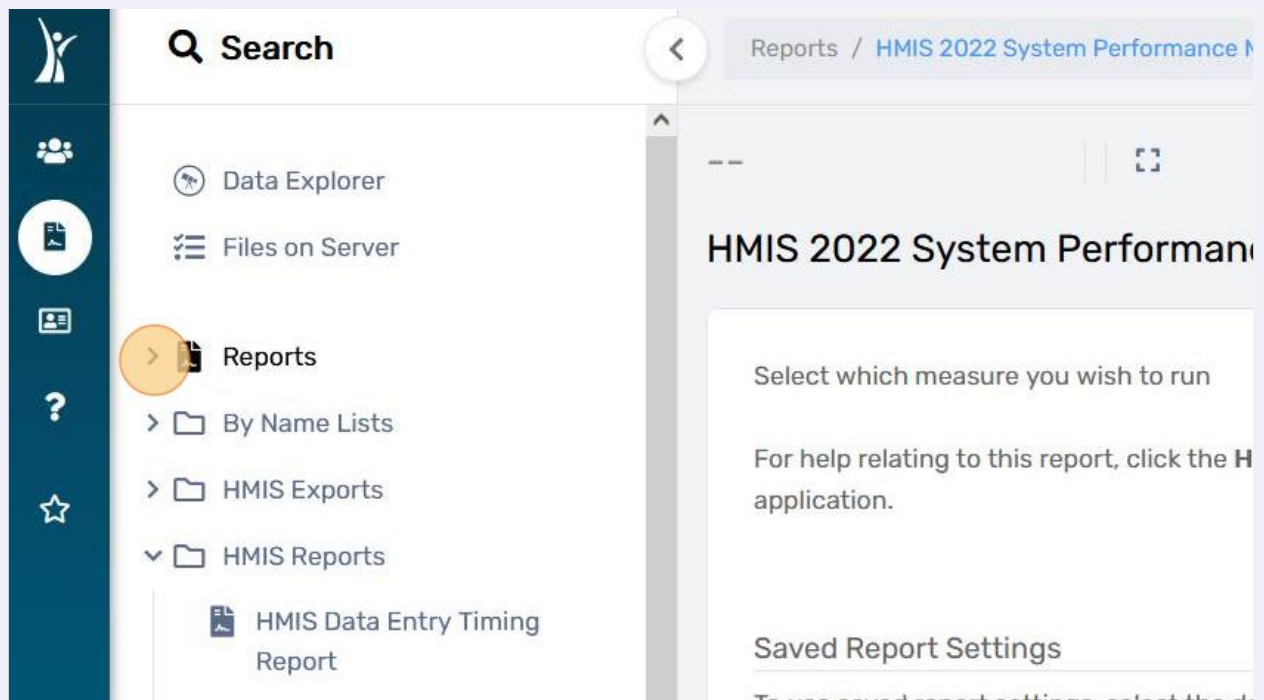
10

This will automatically take you to the Saved Reports section. Click "Scheduled Reports" to check the status.



11

To get back here later, go to the Reports Workspace and click on "Reports".



12

Click "My Saved Reports" to pull up the list of all of your saved/scheduled reports.

