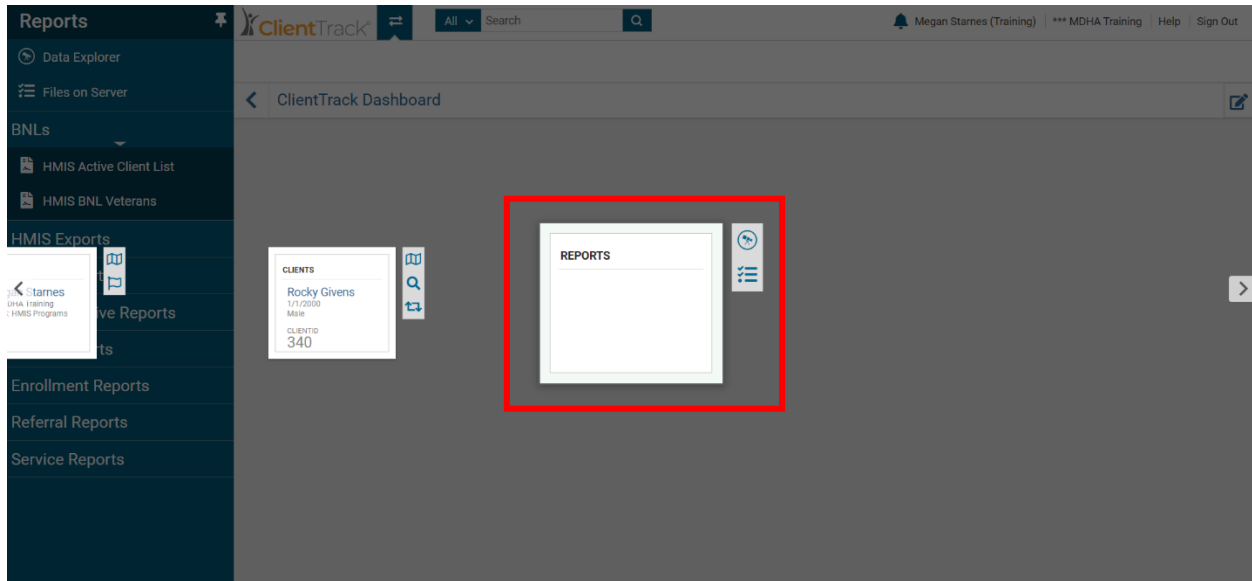


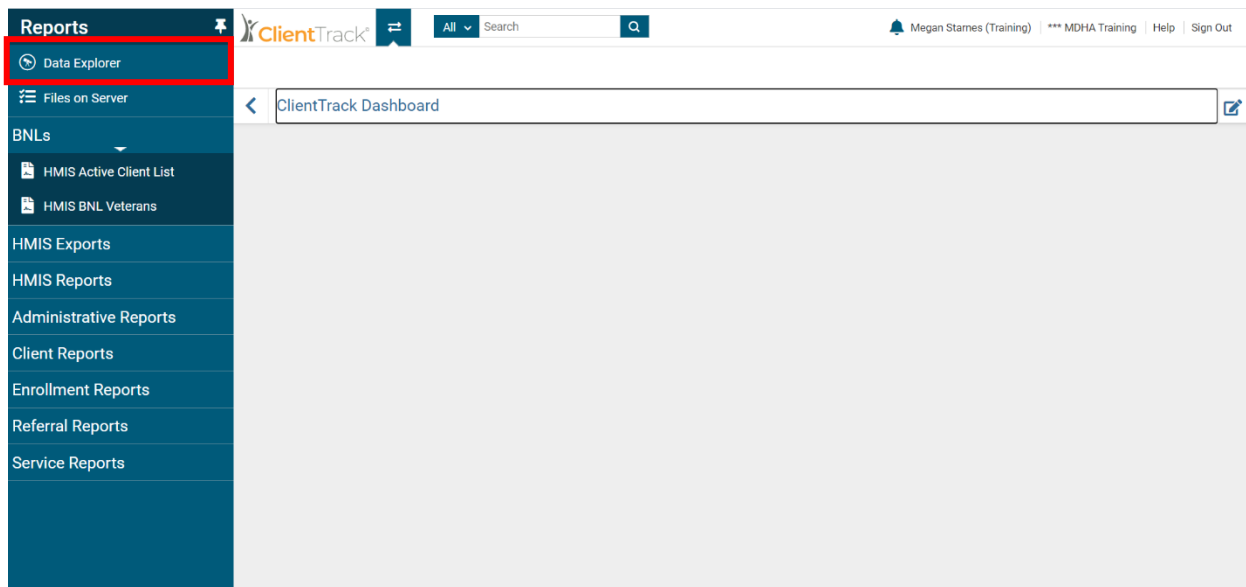
Data Explorer

Accessing Data Explorer Queries

1. Begin by navigating to your Reports workspace.



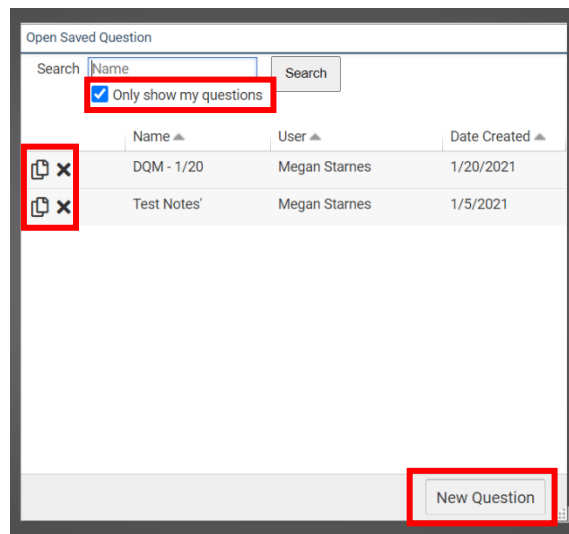
2. Click on Data Explorer in the Favorites Menu.



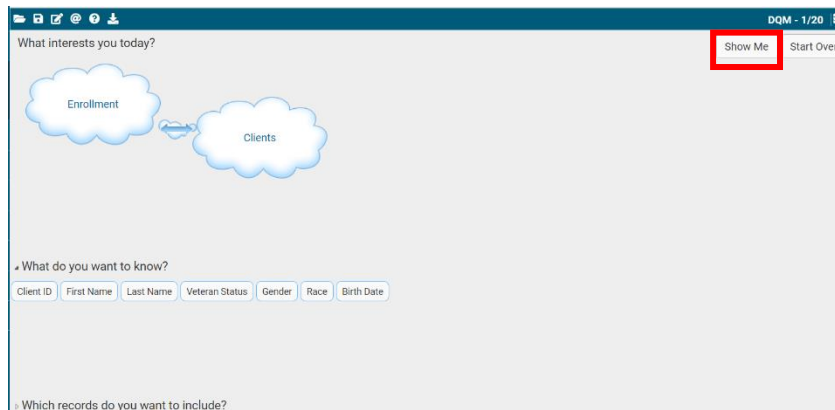
3. Data Explorer gives the options to open a saved question or create a new question.

Note the following tips:

- Uncheck the box next to “Only show my questions” to show questions created by other users.
- Use the Copy and Delete buttons carefully. Do not delete other users’ questions.
 - *Copy* duplicates a question to avoid having to start from scratch if creating a similar query to one that already exists.
 - *Delete* permanently removes the question from the system.
- Use the New Question button to start from scratch on a new query.



Opening a saved question will display the data explorer for that question. Click the Show Me button to run the query.

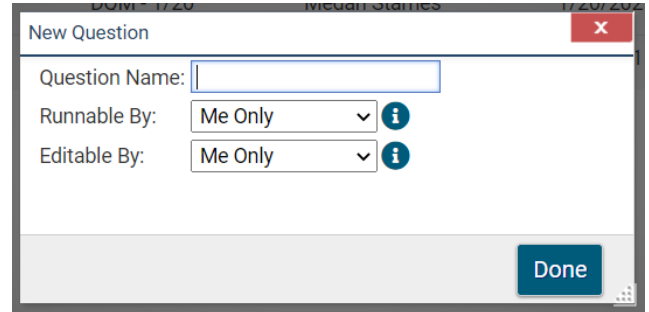


Note that any edits made on queries runnable by multiple users will display for those users. Use of the Copy feature is recommended if edits need to be made on a question created by another user.

Creating a New Question

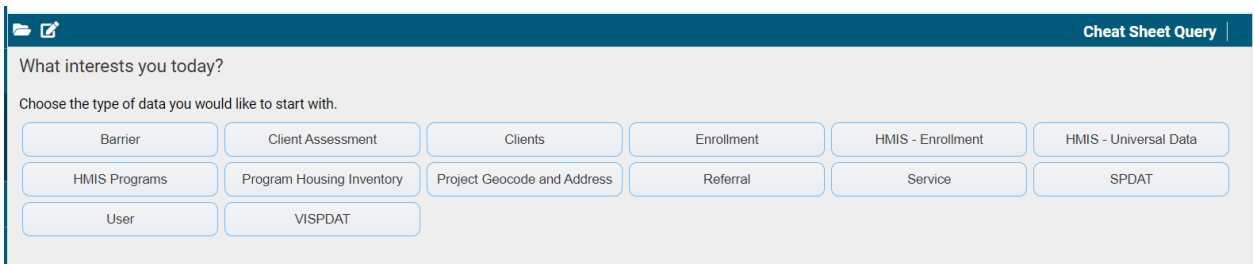
1. Click the New Question button and enter the following information.

- **Question Name**
- **Runnable By:** determines who can run this query
 - Me Only: only the user who creates the query
 - My Organization: everyone in your agency/org
 - Everyone: all HMIS users
- **Editable By:** determines who can edit the query
 - Me Only: only the user who creates the query
 - My Organization: everyone in your agency/org
 - Everyone: all HMIS users



2. Choose a domain to start with.

The domain determines the set of data that the system will search through to answer the query. Starting with a larger domain, like Clients, requires the system to do more work to find the data and may result in the report timing out. Domains can be stacked so that the system filters through them.



Some domains can only be accessed a subdomain. Other domains stand alone or can act as a subdomain to another. For examples, see below.

- Click and drag the desired data elements into the “What do you want to know?” section. These will become the columns in your report.

The screenshot shows the ClientTrack Reports interface. On the left is a navigation menu with categories like Reports, BNLs, HMIS Exports, and HMIS Reports. The main area displays the 'Enrollment' domain with a grid of data fields. A red arrow points from the 'Program' field in the 'What do you want to know?' section to the 'Program' field in the data grid.

Case ID	Case Name	Client ID	Created by Organization
Created by User	Destination at Exit	Destination at Exit Subsidy	Destination at Exit Tenure
Enroll Assessment ID	Enroll Date	Enroll Date - Month and Year	Enroll Date - Year
Enroll ID	Enrollment Created Date	Exit Assessment ID	Exit Date
Exit Date - Month and Year	Exit Date - Year	Exit Reason	Grant
Num of Days Enrolled	Number of Case Members	Other Destination at Exit	Other Exit Reason
Program	Relationship to Head of Case	Still Enrolled	

What do you want to know?

- Click and drag the desired data elements to filter into the “Which records do you want to include?” section. These will filter the data in the database so that only data you have requested will display.

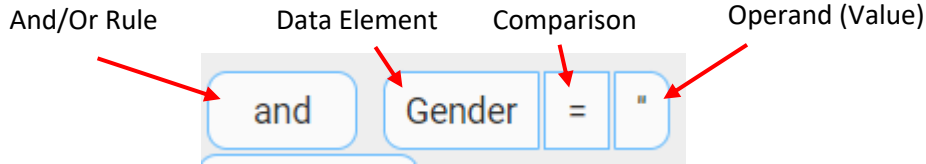
The screenshot shows the ClientTrack Reports interface with the 'Basic Information' domain selected. A red arrow points from the 'Gender' field in the 'Which records do you want to include?' section to the 'Gender' field in the data grid.

Disabling Condition	Email	EntityID	Ethnicity
Family ID	Family Type	First Name	Full Name
Gender	Gender Other	Info Release	Info Release Number
Last Name	Limited English	Marital Status	Middle Name
Name Quality	Number of Family Members	Primary Language	Race
Relationship to HOH	Religious Preference	Scan Card ID	Security Restriction

Which records do you want to include?

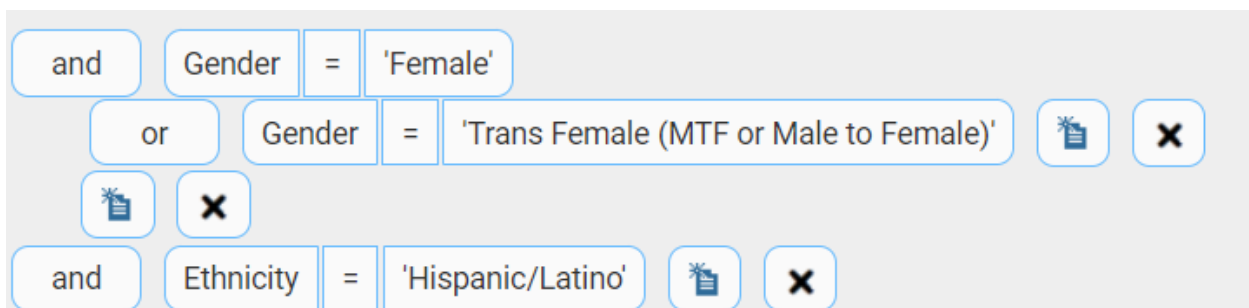
Filter Functionality

Edit the details of each filter to include only the desired information. The basic functionality of a filter includes the following components:



- And/Or Rule
 - AND – the system will include records with all these values
 - OR – the system will include records than contain any of these values
 - Can be used to search for data that is mutually exclusive
- Data Element
 - This is the data you chose to create the filter. The system will use data from this category in the database to limit the number of records returned in the query.
- Comparison
 - Determines how the system will use the value entered in the operand to filter
- Operand (Value)
 - Value or data point the system will use to filter
 - This could be a date, a program name, a numerical value, etc. but it should match the type of data being requested. The system will provide value selections when appropriate.
 - For example, if Gender is being used to filter, the system will provide a list of genders to choose from.

Filters can be stacked so that the rules are applied in the desired way. For example, in the query below, the system will return records for clients with a recorded gender of female or trans female who also have Hispanic/Latina ethnicity.



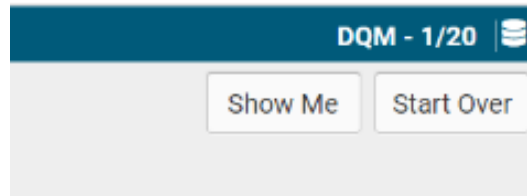
- To add a sub filter, drag and drop the desired data element next to an existing filter.

5. Continue dragging and dropping data elements into the desired positions as columns or filters.

You can pull data from multiple domains and subdomains. Primary domains display on the data explorer page and as clouds that are linked together if you click Done. Subdomains display under "Add Related Information" on the right side of the page once you open a domain.

6. Click Show Me in the top right corner to save and view your report.

Clicking Start Over will clear all your selections and give you a blank slate to begin building again.



Your data will display in the system. You may see duplicates unless you have used filters to deduplicate. You can download the data as a .csv file using the download button in the top right corner of the report.

Entity data is not configured

Here's Your Data

30 results found.

Created By	Room	Facility	Client Na...	Age
Danh Do...	Single Ad...	CitySquar...	Clips, Ju...	51
Danh Do...	Single Ad...	CitySquar...	Clips, Ju...	51
Danh Do...	Single Ad...	CitySquar...	Clips, Ju...	51
Freda Nel...	Women G...	Austin St...	Fam, Freda	51
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	CoMc - R...	Jenkins, ...	32
Megan St...	Families	FG - PSH ...	Test, Jodi	42
Megan St...	Families	FG - PSH ...	Test, Jodi	42
Megan St...	Families	FG - PSH ...	Test, Jodi	42
Megan St...	Families	FG - PSH ...	Test, Jodi	42