

# Data Explorer

# **Accessing Data Explorer Queries**

1. Begin by navigating to your Reports workspace.

Reports	Ŧ )ĭ	ClientTrack*	≓ All ∨ Sea	arch Q		🌲 Megan Starnes (Training)   *** MDHA Training   Help   Sign Out
🛞 Data Explorer						
\Xi Files on Server	<	ClientTrack D	ashboard			Z
BNLs						
HMIS Active Client List						
HMIS BNL Veterans						
HMIS Exports		CLENTS Rocky Givens 17/7000 Male CLENTID 340	교 Q 1	REPORTS	<b>⊗</b> ≆≡	Đ
Referral Reports						
Service Reports						

2. Click on Data Explorer in the Favorites Menu.

Reports <b>∓</b>	ClientTrack Z All v Search Q Megan Starmes (Training) *** MDHA Training Help Sign Out
🕥 Data Explorer	
¥Ξ Files on Server	ClientTrack Dashboard
BNLs 🗸	
HMIS Active Client List	
HMIS BNL Veterans	
HMIS Exports	
HMIS Reports	
Administrative Reports	
Client Reports	
Enrollment Reports	
Referral Reports	
Service Reports	



- 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.

Open Saved C	)uestion		
Search Na	ame Only show my questions	Search	
	Name 📥	User 📥	Date Created 📥
ሮ ×	DQM - 1/20	Megan Starnes	1/20/2021
<b>ل ک</b>	Test Notes'	Megan Starnes	1/5/2021
			New Question

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

Enrollment Clients		DQ						1 @ 0 4	- 8 2
What do you want to know?	v Me Start Ove	Show Me					today?	terests you	What int
	-			3	ients	CI	چکر	~	<
							to know?	o you want	What d
Client ID First Name Last Name Veteran Status Gender Race Birth Date			Birth Date	Race	Gender	Veteran Status	Last Name	First Name	Client ID

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.

<b>=</b> C	Cheat Sheet Query									
What interests you today?										
Choose the type of data you wou	ld like to start with.									
Barrier	Client Assessment	Clients	Enrollment	HMIS - Enrollment	HMIS - Universal Data					
HMIS Programs	Program Housing Inventory	Project Geocode and Address	Referral	Service	SPDAT					
User	VISPDAT									

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

New Question	,	Ivieuan S	lames	1/2	<b>X</b>
Question Name:					
Runnable By:	Me Only	~	•		
Editable By:	Me Only	~	6		
				Done	



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

Reports	* XClientTrack	All 🗸 Search	Q	Megan S	Starnes (Training)   *** MDHA Training   Help   Sign Ou			
🕥 Data Explorer	Entity data is not configured							
🚝 Files on Server	Enrollment ~				Show Me Done			
My Saved Reports	Case ID	Case Name	Client ID	Created by Organization	The Enrollment Domain includes information			
3NLs	Created by User	Destination at Exit	Destination at Exit Subsidy	Destination at Exit Tenure	about period of client participation in program and /or grant. The informat			
HMIS Active Client List	Enroll Assessment ID	Enroll Date	Enroll Date - Month and Year	Enroll Date - Year	included in the Enrollment Domain is similar to the information found on the 'Enroll Client' form. Add Related Information			
HMIS BNL Veterans	Enroll ID	Enrollment Created Date	Exit Assessment ID	Exit Date				
	Exit Date - Month and Year	Exit Date - Year	Exit Reason	Grant				
HMIS Exports	Num of Days Enrolled	Number of Case Members	Other Destination at Exit	Other Exit Reason	Bed Check Bed Nights			
HMIS Reports	Program	Relationship to Head of Case	Still Enrolled		Current Residents			
Administrative Reports					Diversion Entry Assessment			
Client Reports					Exit Assessment			
Enrollment Reports	What do you want to kn Program Full Name Telep		Telephone Work					
Referral Reports	Plogram Pull Name Teles		Telephone work					
Service Reports								

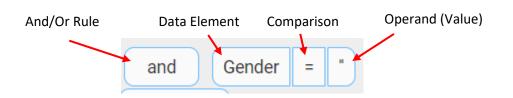
4. Click and drag the desired data elements to filter into the "Which records do you want to include?" section. These will filter the data in the database so that only data you have requested will display.

Reports	* XClientTrack	≓ All ✓ Search	Q	🙎 Mega	n Starnes (Training)   *** MDHA Training   Help   Sign Out			
🕥 Data Explorer	Entity data is not	_						
E Files on Server	Disabling Condition	Email	EntityID	Ethnicity				
L My Saved Reports	Family ID	Family Type	First Name	Full Name	Show Me Done This domain includes basic information			
3NLs	Gender	Gender Other	Info Release	Info Release Number	about clients. The information in this domain includes basic data that would likely be			
-	Last Name	Limited English	Marital Status	Middle Name	accessed via the "Edit Client" form. There are several other domains you may join to the			
HMIS Active Client List	Name Quality	Number of Family Members	Primary Language	Race	Client Domain.			
HMIS BNL Veterans	Relationship to FoH	Religious Preference	Scan Card ID	Security Restriction	Add Related Information			
HMIS Exports	What do you want to k	> What do you want to know?						
HMIS Reports	- Which records do you	want to include?			Reset Filters			
Administrative Reports	and Gender = *	<b>b x</b>						
Client Reports	Add a Filter							
Enrollment Reports								
Referral Reports								
Service Reports								

## Filter Functionality

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



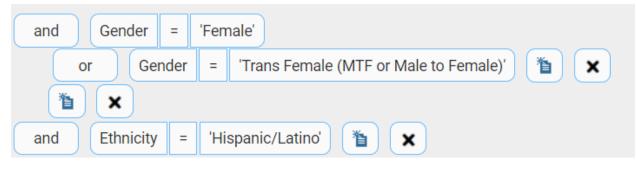


• And/Or Rule

0

- 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)
  - o 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.

DC	DQM - 1/20 🏼							
Show Me	Start Over							

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.

Reports	Client Track	Kegan Starnes (Training)   *** MDHA Training   Help   Sign Out
🔊 Data Explorer	Entity data is not configured	
扫 Files on Server		Test ESG New Client Bas
Ky Saved Reports	Here's Your Data	Visuali e 🛃 🖬
BNLs	30 results found.	
HMIS Active Client List	Created By Room Facility Client Na Age	
HMIS BNL Veterans	Danh Do Single Ad CitySquar Clips, Ju 51	
	Danh Do Single Ad CitySquar Clips, Ju 51 Danh Do Single Ad CitySquar Clips, Ju 51	
IMIS Exports	Freda Nel Women G Austin St Freda 51	
IMIS Reports	Megan St Families CoMc - R Jenkins, 32	
dministrative Reports	Megan St Families CoMc - R Jenkins, 32	
Client Reports	Megan St., Families CoMc - R., Jenkins, 32 Megan St., Families CoMc - R., Jenkins, 32	_
nrollment Reports	Megan St Families CoMc - R Jenkins, 32	
	Megan St Families CoMc - R Jenkins, 32	
eferral Reports	Megan St Families FG - PSH Test, Jodi 42	
ervice Reports	Megan St Families FG - PSH Test, Jodi 42	
	Megan St., Families FG - PSH ,, Test, Jodi 42 Megan St., Families FG - PSH ,, Test, Jodi 42	