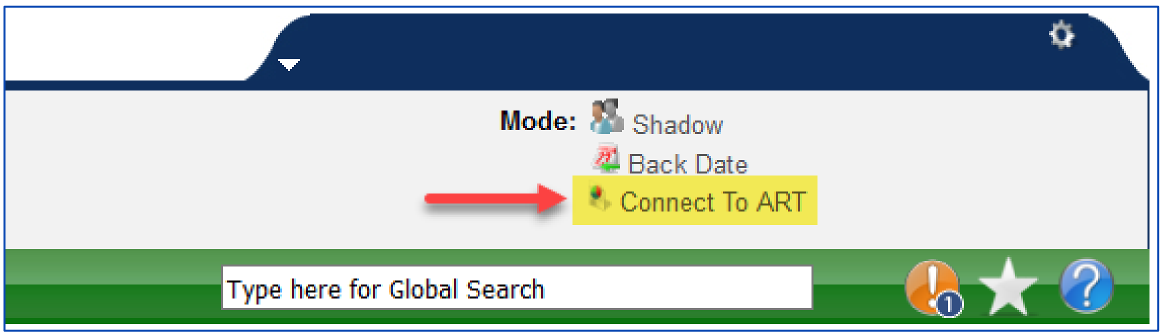
# how to... SCHEDULE AN ART REPORT

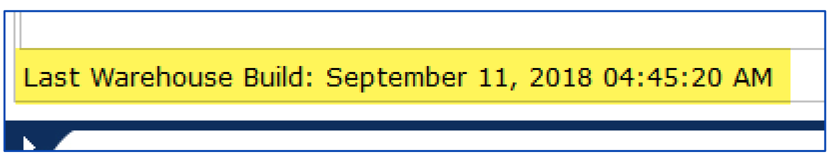
The ART reporting module is used to generate reports to check an agency's data quality and share outcomes with funders.

## STEP 1: CONNECT TO ART

1. Click on **Connect to ART** in the top right corner of the screen (underneath **Back Date**).

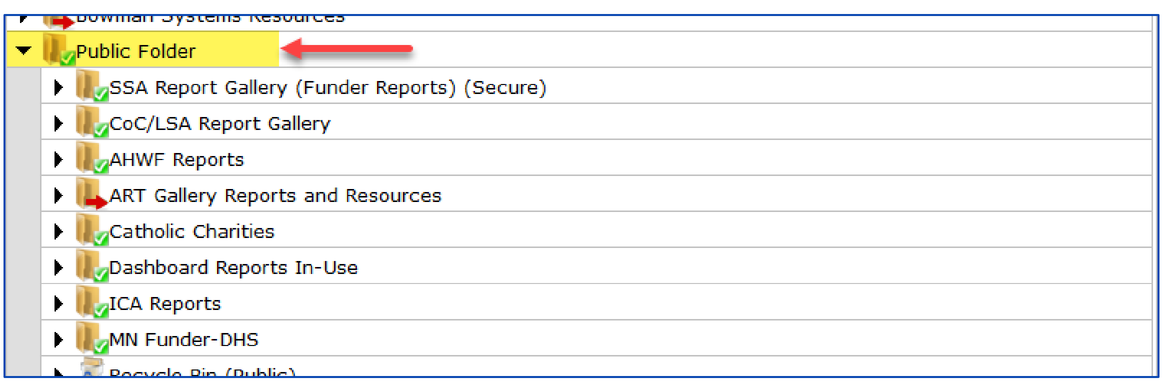



2. Scroll down to the bottom of the ART screen to check that a **warehouse build** (also called an "**ART Refresh**") has been completed recently. In order for a client's data to appear in ART reports, their information must have been entered *several hours prior* to the most recent build.

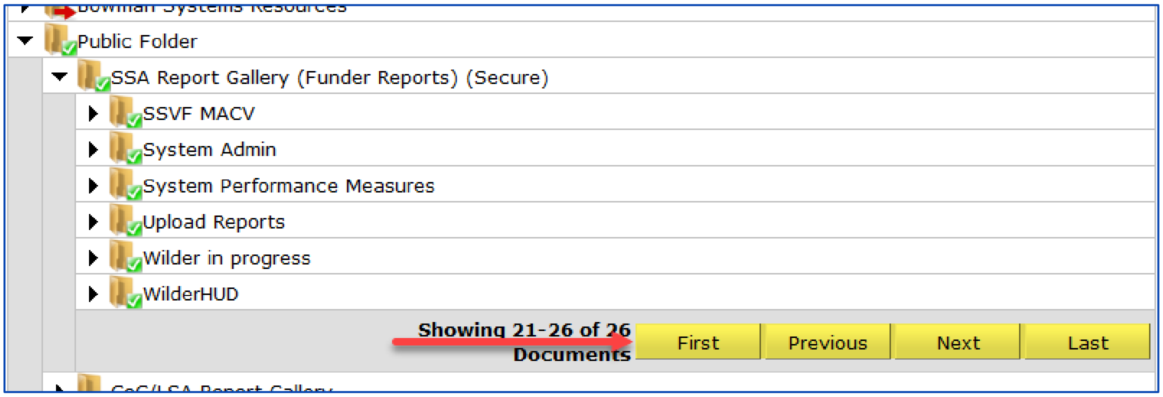



## STEP 2: LOCATE A REPORT

1. Click on the **arrow** next to **Public Folder** to access the most commonly-used ART reports.

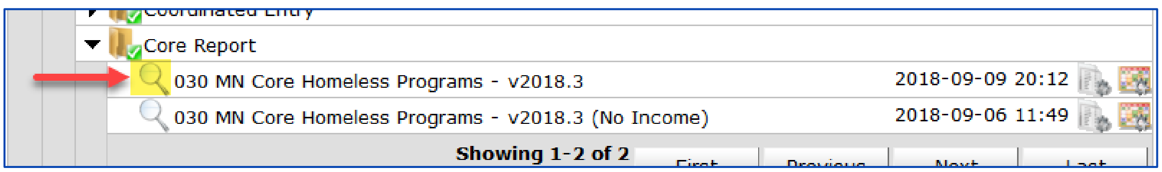


2. Within the **Public Folder**, reports are organized into **subfolders**. If necessary, you can use the **navigation buttons** to move between pages of ART reports.

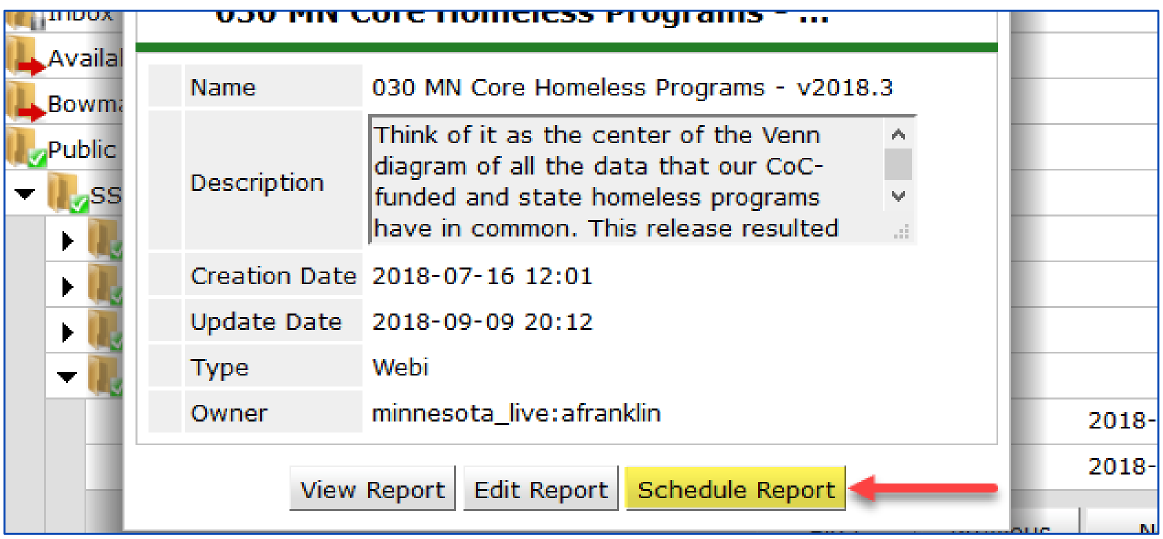



## STEP 3: SCHEDULE ("RUN") A REPORT

1. Click on the **magnifying glass** next to a report to view that report's description and the different options for running it.




2. Select **Schedule Report** to bring up the **ART Report Prompts** pop-up.



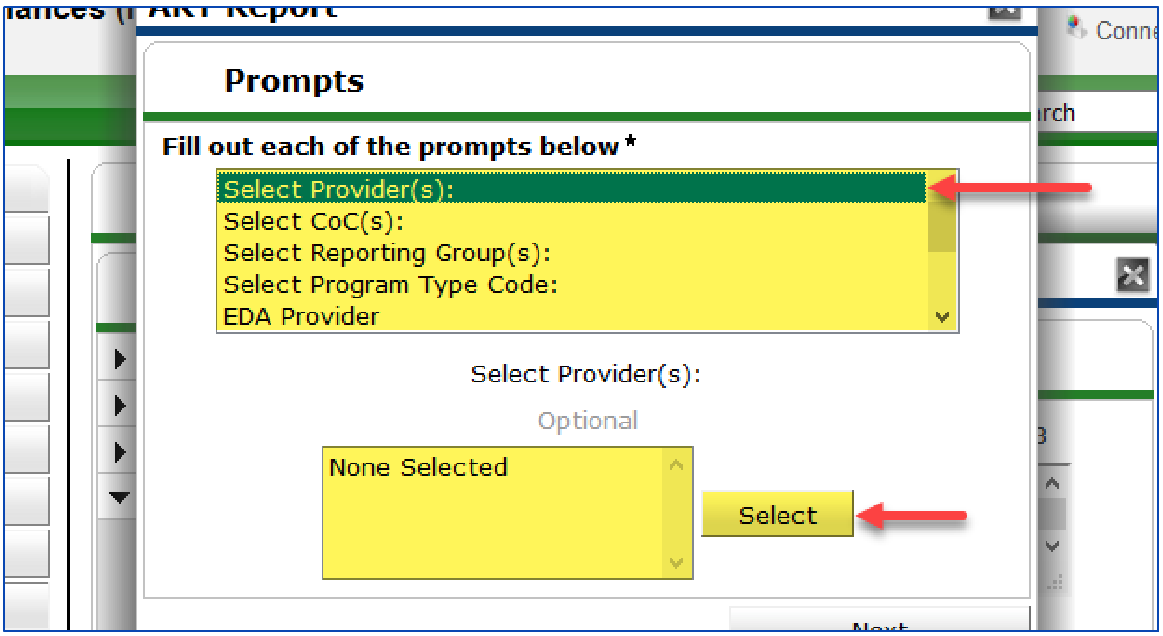
3. The **ART Report Prompts** pop-up may contain several different prompts. However, these four prompts can be found on most reports and should almost always be filled out:

    a. **Select Provider(s):** The provider(s) whose information should be pulled into the report.

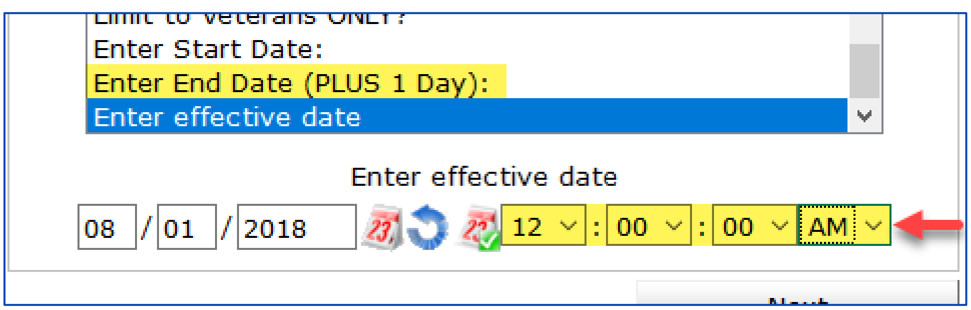
    b. **Enter Start Date:** The start of the reporting period.

    c. **Enter End Date (Plus 1 Day):** The end of the reporting period. Note that the End Date should be increased by one day, so for a report with an End Date of 07/31/2018, you would enter 08/01/2018 into this field.

    d. **Enter Effective Date:** The Effective Date should almost always be equal to the **End Date (Plus 1 Day)** value.




    e. When entering a date, you should almost always set the **time** to **12:00:00 AM**.




4. Click on **Next** when all of the necessary prompts have been filled out. The **Schedule Report** pop-up will appear.

5. The **Schedule Report** prompt offers several useful options:

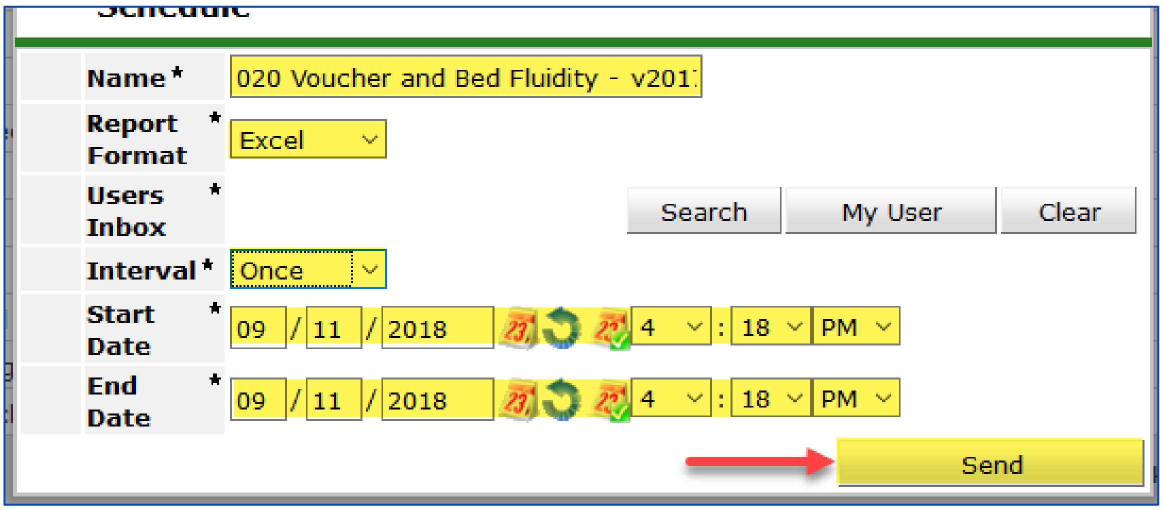
    a. **Name**: Give the report a different name. Some users like to include identifying information, such as the provider numbers included in the report.

    b. **Report Format**: Reports can be downloaded as an Excel workbook or a PDF.

    c. **Interval**: Reports can be scheduled to run on a regular basis, such as monthly. (Note: When a new version of a report is released, it is important to reschedule reoccurring reports to ensure that the latest report version is being used.)

    d. **Start Date**: The first date the report should be run.

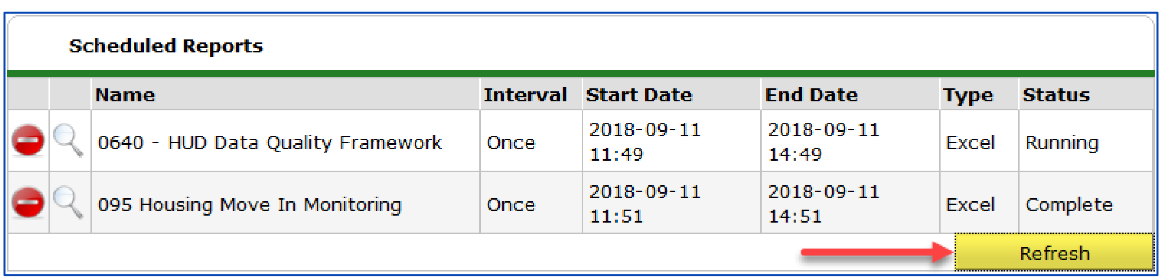
    e. **End Date**: The last date the report should be run.




6. Click on **Send** when all desired options have been selected.

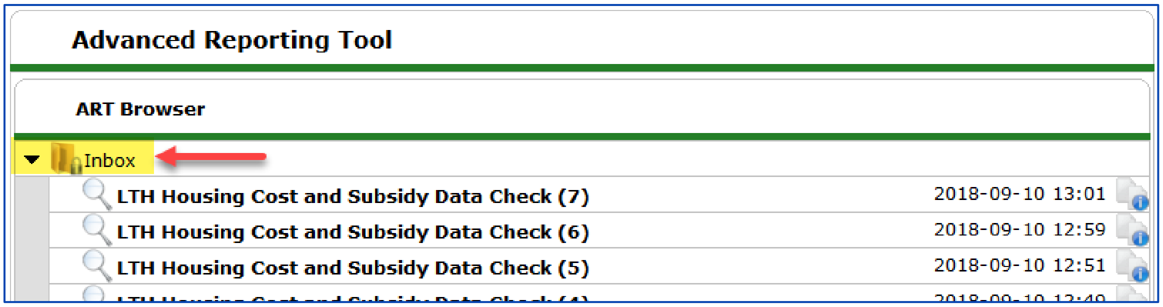
## STEP 4: REVIEW A REPORT

1. When a report is scheduled, it will show up at the bottom of the ART screen. Click on **Refresh** if a recently scheduled report is not listed.




    a. If you click on the **magnifying glass** in the **Scheduled Reports** section, **do not** use the **Reschedule Report** feature. This feature will not always use the newest version of a report, which means that the report may contain false data entry errors.

2. Copies of scheduled reports can be downloaded from the **Inbox** folder.




3. Many reports contain **error keys** which can be used to identify and correct data entry errors.

| Data Element | Error | Cause |
|---|---|---|
| Group Id | 0000 | Red Group Id number indicates there is an HoH error. See the Errors tab to identify groups with Multi HoH or NO HoH. |
| L/S | | Leaver / Stayer Abbreviation<br>L = Client's stay ended during the reporting period<br>S = Client's stay extends past the report end date |
| Inc Type | E<br>O<br>EO | Indicated an income has been recorced for the client and marked Receiving Income Source = Yes<br>E - Earned Income<br>O - Any HUD Income other than Earned Income<br>EO - Both Earned Income and another HUD type |
| EIC ONLY<br>Other | -- | No valid income recorded. Client record is not counted. |

4. Have a question about a report?

   a. For general assistance, contact the Minnesota HMIS helpdesk at mnhmis@icalliances.org.

   b. For a list of all publicly available ART reports, visit the ICA MN REPORTcollection webpage.

   c. Report feature enhancements and custom report requests can be submitted through the Minnesota Reports Request form. Submissions are placed into a queue, where they are evaluated in order to determine their priority level and required time investment.