

# Running Reports in Clarity

## Learner Guide

Become proficient in managing reporting workflow in Clarity.

## About Clarity

Clarity is a Homeless Management Information System (HMIS), that collects and stores comprehensive, individual-level data about individuals who utilize the service system.

Clarity is a powerful tool that connects your community's most vulnerable populations to resources while streamlining workflows, and provides analytics for informed decisions.

## Reports in Clarity can:



### Answer basic questions

Clarity helps collect data from your projects and translate it into a digestible format. You can generate reports on client demographics, service utilization, outcomes, and more.r agency.



### Provide timely records

Clarity offers strong reporting capabilities for monitoring program effectiveness, requested services, referrals, financial health, or a segment of your projects.



### Provide project status and insights

Clarity reports can show you the status of certain information in an Excel file or simple data visualization.

## Explore:

### Report library

- Within the Report Library, you will find status badges, favorite reports, and processed/scheduled reports.

[Learn more](#)

### Report types

- Share valuable insights and make informed decisions based on data. Get familiar with various report types in Clarity.

[Learn more](#)

### How to run reports

- Review the steps to set parameters and successfully run different client reports in Clarity.

[Learn more](#)

### How to schedule reports

- Clarity allows users to specify a date (or dates) to run a report in 3 simple steps.

[Learn more](#)

# Report Library

## Managing Reports

## How to use the Report Library

This section describes the features in the Report Library, including status badges, favorite reports, and processed/scheduled reports. The Report library view may differ depending on your agency's reporting needs.



## Report library features

**1**

### Report status badges

Badges may be displayed adjacent to report names. These badges should give you a visual indicator of the report's status.

Be sure to consider these statuses when reviewing the reports.

**2**

### Favorite reports

You can save your favorite reports to find them easily in the system.

You can mark a report as a favorite by clicking the *star icon*.

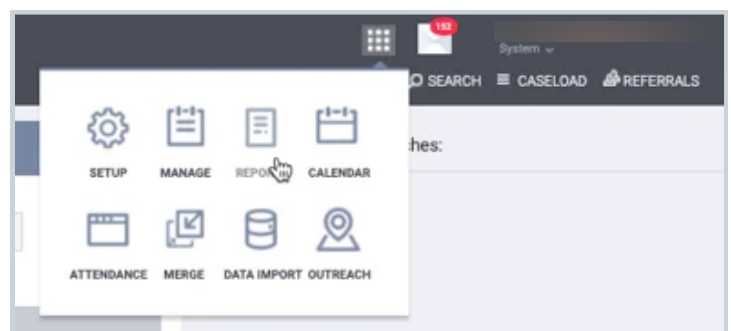
**3**

### Processed & scheduled reports

There are two additional sections in the Report Library's right sidebar: Processed Reports and Scheduled Reports.

#### About the Report Library

- ✓ To access the *Report Library*, click the reports icon from the Launchpad.
- ✓ The Report Library contains sections for each report category. Select the category from the drop-down next to the report.
- ✓ The report sections depend on the Report Library configuration established by system administrators.
- ✓ System administrators can also select which users can access reports based on access roles.



**Note:** This guide covers the essentials of the course *Running Reports in Clarity*. Review the training course for a complete overview.

# Report Types


## Managing Reports

## Get familiar with Clarity Reports

Various reports may be available within Clarity, depending on your system settings. These reports will allow you to gain valuable insights and make informed decisions based on data. Familiarize yourself with the different report categories.



## Clarity report types

 The availability of these reports may vary, based on your Clarity system and report settings.

### 1 Administrator Reports

For example, the HMIS Statistics Report and the Client Assessment score.

### 2 Agency Management Reports

For example, User Activity Report or Staff Client Data Activity.

### 3 Assessment Reports

For example, CE Demographics Report and Assessment Details Report.

### 4 Client Reports

For examples. Homeless Status Timeline Report and Client Enrollment Details.

### 5 Community & Referrals

For example, Referral Outcome Statistics.

### 6 Data Quality Reports

For example, Duplicate Assessments Report or Duplicate Clients.

### 7 Housing Reports

For example, CoC Housing Assessment Report and Current Housing Availability.

### 8 HUD & Partner Reports

HMIS Data Quality Report, RHY and SSVF Reporting, or Annual Performance Report.

### 9 Program-Based Reports

For example, Program Outcome Measures or Performance Monitoring.

### 10 Service Reports

For example, Households Served Report or Service Expense Review.

**Note:** This guide covers the essentials of the course *Running Reports in Clarity*. Review the training course for a complete overview.

# Running Reports

## Managing Reports

## How to run reports in Clarity

Running reports in Clarity is easier than it looks. In this section, recall the 5 simple steps needed to run a report in your Clarity System effectively.



## Reports workflow

### 1 Getting started

Navigate to the *Report Library*. Select the launchpad and then the report icon.

### 2 Choose your report

Find your most used reports in *Favorites Reports* or select *Show More* to read a summary of what's included in a particular report.

### 3 Set Report Parameters

Click *Run* to navigate to the Preview tab, where you will set the report parameters.

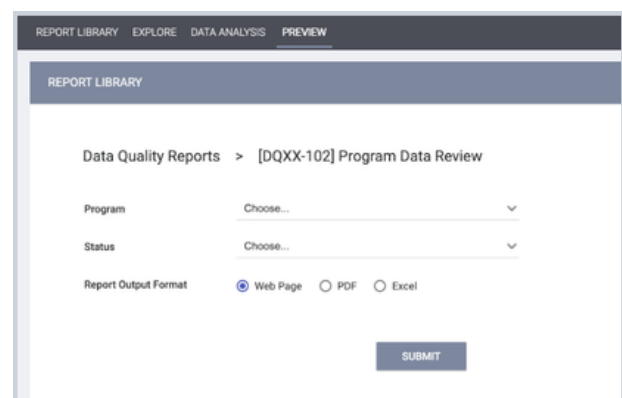
Each report is different, so parameter options will vary depending on the report you choose.

### 4 Pending and Completed Reports

After you click OK, the *Report Queue Manager* pop-up box appears, notifying you that your report is being processed.

### 5 Open or download your report

Once the report is finished running, another popup appears, notifying you that the report is ready.



**Note:** This guide covers the essentials of the course *Running Reports in Clarity*. Review the training course for a complete overview.



# Scheduling Reports

## Managing Reports

## How to schedule reports



Scheduling reports allows users to specify a date for the Clarity system to run a specific report. Recall the *3 easy and simple steps* to schedule a report effectively.

## Steps to schedule a report

### 1 Go to Report Library

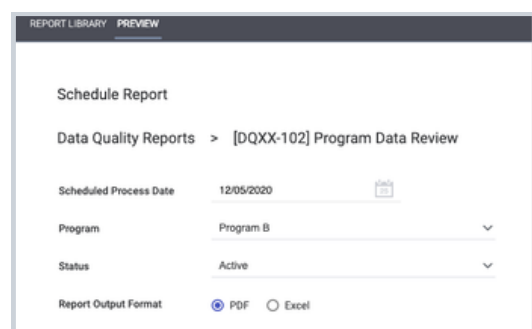
Once in the Report Library, select the *Schedule* icon  next to the report you need.



### 2 Set report parameters

You will be navigated to the Preview tab, where you can set the parameters for the scheduled report.

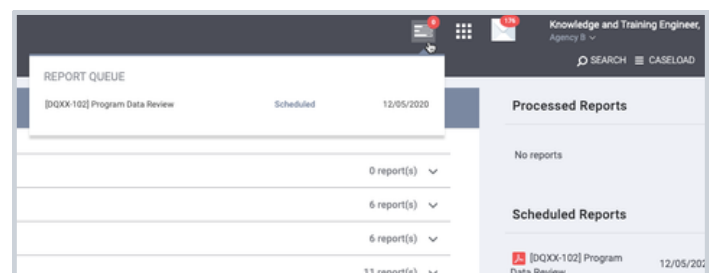
Be sure to edit the *scheduled process date*.



### 3 Submit scheduled report request

After you click *Submit*, the *Report Queue Manager* popup notifies you that the report has been added to the queue.

The report will show up under the *Scheduled Reports* section in the right sidebar and in the *Report Queue*.



**Note:** This guide covers the essentials of the course *Running Reports in Clarity*. Review the training course for a complete overview.