

QRG – Generating an ESG CAPER or APR Report and Upload to SAGE

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WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR – This guide is useful for System Admins who will be generating the ESG CAPER report for their ESG Grant based programs. Please refer to any guides that have been provided by the grantor for specifics.

This Guide can also be used for APR based reports that require upload to SAGE. Simply substitute APR for CAPER when following the outlined steps and supporting screenshots.

You must be in the role of System Admin to perform these steps.

RECOMMENDED PREPARATIONS FOR ESG CAPER REPORTING

It is recommended that you run an ESG CAPER Report at least monthly to assure that data being captured is accurate.

OVERVIEW OF ESG CAPER REPORTING AND UPLOAD TO SAGE

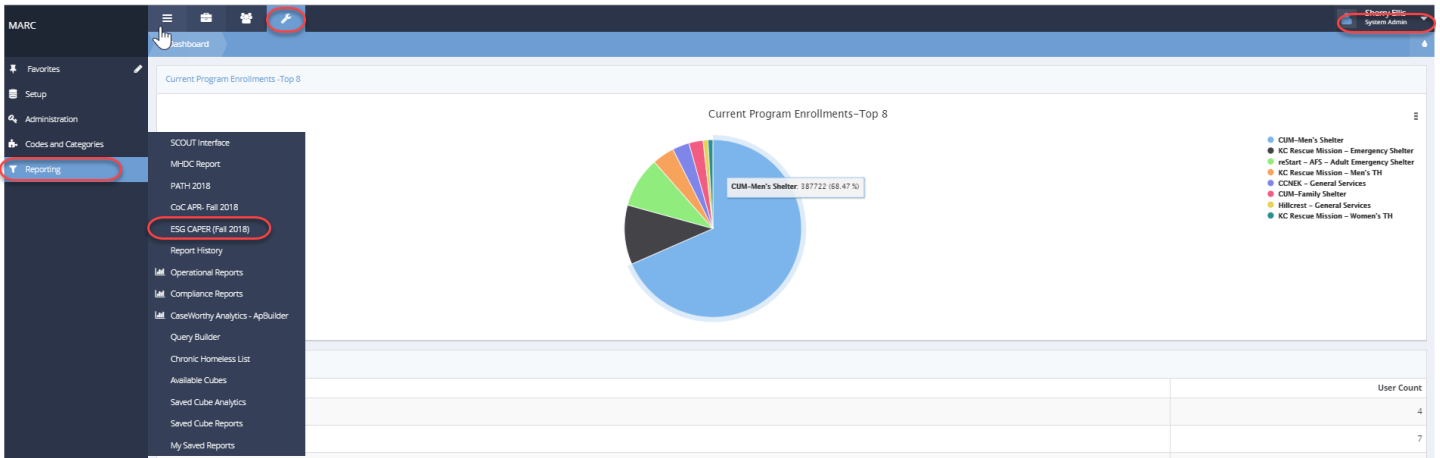
Generating the ESG CAPER export file and uploading to SAGE is a 3-step process.

Step	Details
1	Generate the ESG CAPER export file in Caseworthy HMIS
2	Download the export file from Caseworthy HMIS
3	Upload the export file to SAGE

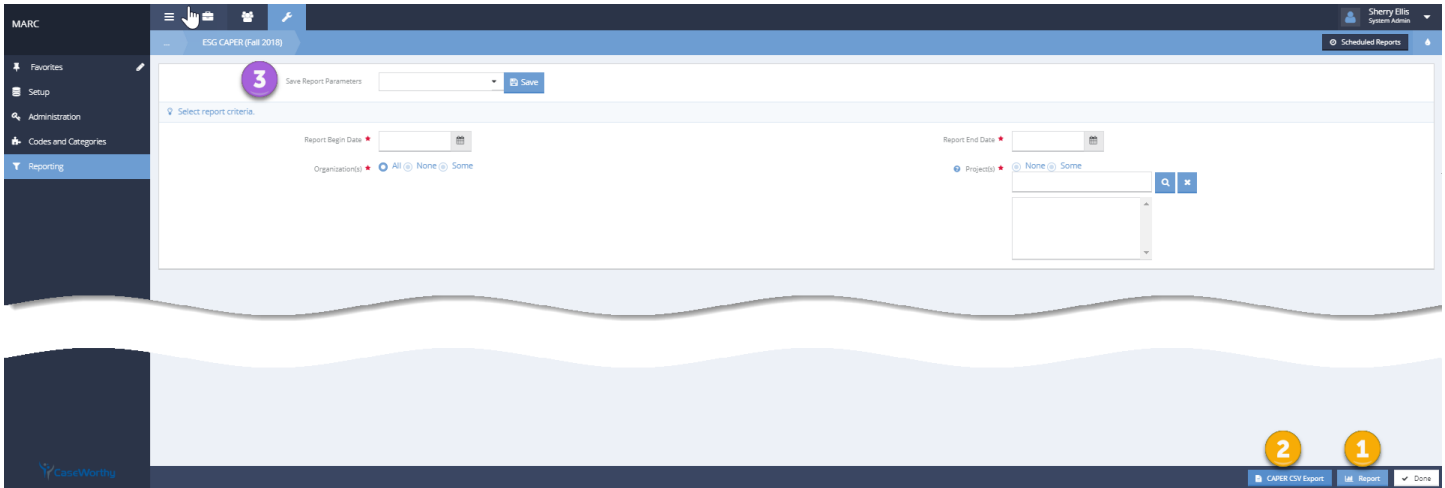
This guide focuses on steps 1 & 2, both of which are completed thru KC Metro HMIS. For more information on the 3rd step, reach out to your program administrator for your agency.

STEP 1: GENERATING THE ESG CAPER EXPORT FILE

Go to *Administration : Reporting : ESG CAPER (FALL 2018)*



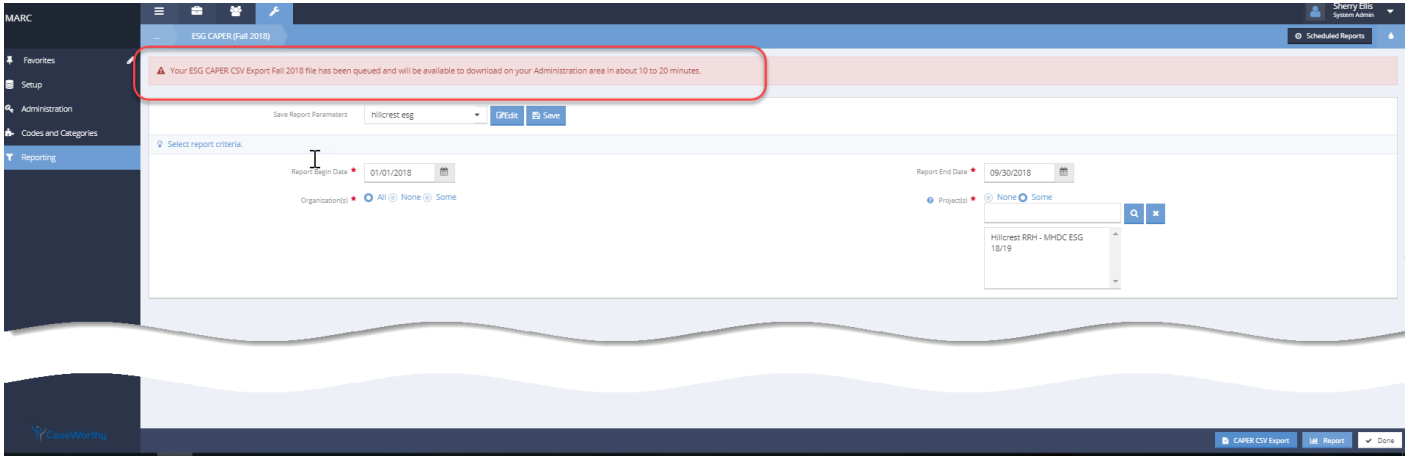
Complete the required report fields.



Item	Field/Button	Info
1	Report	Click here to generate a CAPER report to view online. This is most useful for report preparations to view detailed data.
2	CAPER CSV Export	Click here when you are ready to generate the CSV file needed to upload into SAGE.

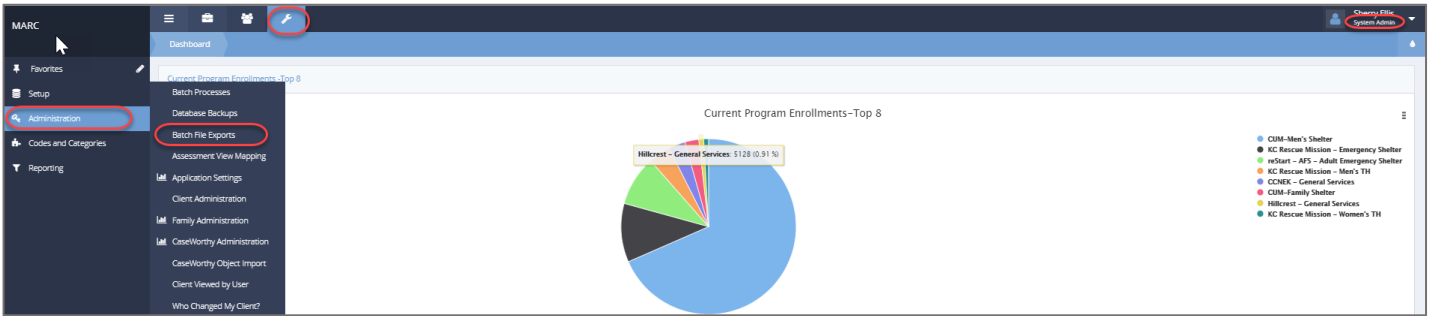
3 Using the Save Report Parameters is not covered in this QRG, though you may find it helpful when generating this report on a regular basis. Please reach out thru hmishelpdesk@MARC.ORG to request guidance.

Once you click on the *CAPER CSV Export* button you will receive a system message:



STEP 2: DOWNLOAD THE EXPORT FILE

Go to *Administration : Administration : Batch File Exports*



This will take you to a list of all recent batch export files available (for all HMIS users). More than likely your record will appear at the top – look for the record which has your *User*, *Organization* and *Requested Date*. The *Description* identifies the parameters used to create your report.

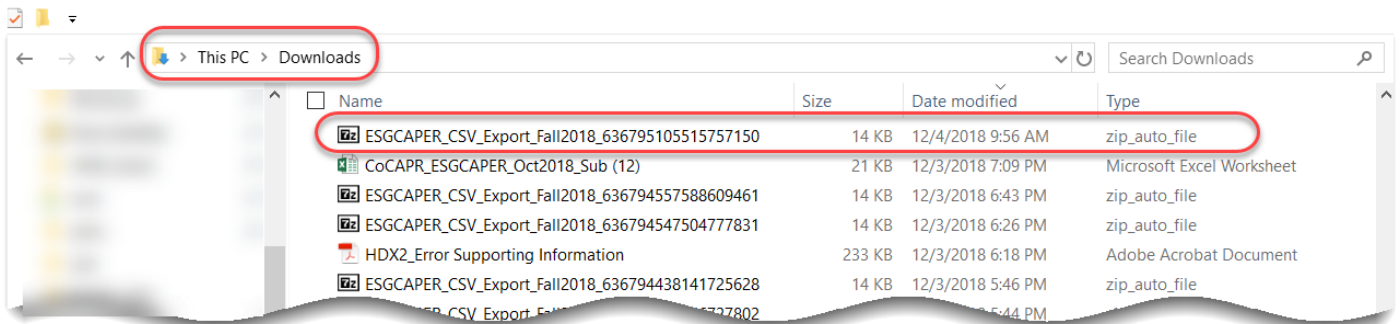
The actual name for the generated file can be found in *File Name* column. If the *File Name* column field is blank that just means that HMIS is still generating the file. Wait a minute or two and then refresh your screen. Once the name appears in *File Name* for your record you are ready to download the file to your computer. Also, please note that the csv file created is a zip file.

	User	Organization	Requested Date	File Name	Task ID
Download File	sellis	MARC	12/29/2018	ESGAPER_CSV_Export_Fall2018_636815923912583569.zip	57220
Delete	Iross	Hillcrest Transitional Housing	12/28/2018	ESGAPER_CSV_Export_Fall2018_636815891956119505.zip	57219
	sellis	MARC	12/27/2018	LSA_Export_636815257985363197.zip	57212
	sellis	MARC	12/27/2018	LSA_Export_636815243659872213.zip	57211
	owhite1	SAVE, Inc.	12/26/2018	APR_CSV_Export_Fall2018_636814294063167597.zip	57204
	owhite1	SAVE, Inc.	12/26/2018	APR_CSV_Export_Fall2017_636814268201244136.zip	57203
	bowlsley	Truman Medical Centers - Behavioral Health	12/20/2018	APR_CSV_Export_Fall2018_63680909272180506.zip	57162
	bowlsley	Truman Medical Centers - Behavioral Health	12/20/2018	APR_CSV_Export_Fall2017_63680909272180506.zip	57161

To download the ESG CAPER zip file click on the *Gear Wheel* for your record and select *Download File*.

Use the functionality of your web-browser to save the downloaded file. (Some browsers automatically download the file to a folder called “Downloads”).

Here is a screenshot of a downloaded report using Google Chrome.



STEP 3: UPLOAD THE EXPORT FILE TO SAGE - TIPS

This step of the process is to upload the zip file to SAGE, which is not covered in this QRG. However, here are some useful tips and info.

- SAGE is the upload repository for HMIS reports managed by HUD.
- SAGE Portal: <https://www.sagehmis.info/>
- Some Grantors may send you email links to test and upload your reporting to SAGE. Other Grantors may instruct you to go directly to SAGE and upload without an email link.
- If your Grantor instructs you to go directly to SAGE and upload, you are required to have a Userid and password to upload your official reports. Follow the instructions from the **New User?** section from the SAGE portal. Obtaining a Userid and password may take a few days so do not wait till report deadline date to request.
- You do NOT have to have a Userid or password to perform a test upload. Follow the instructions from **Test run a report** section from the SAGE portal.