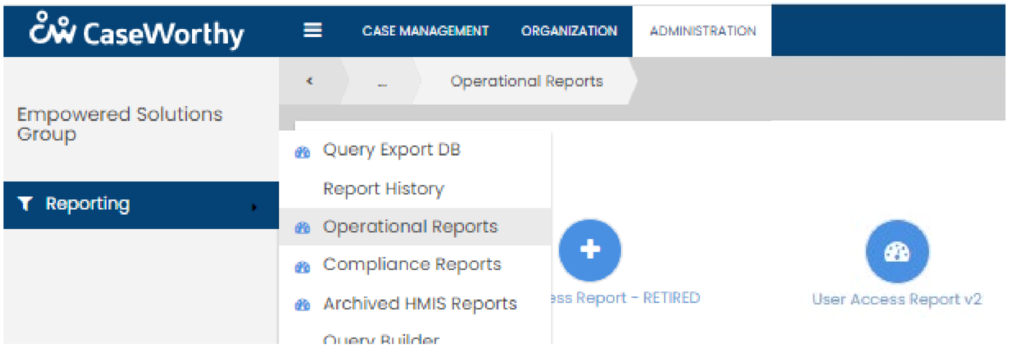
User Access Report v2 – How to Run the Report
Updated 1/25/2022 by CCEH

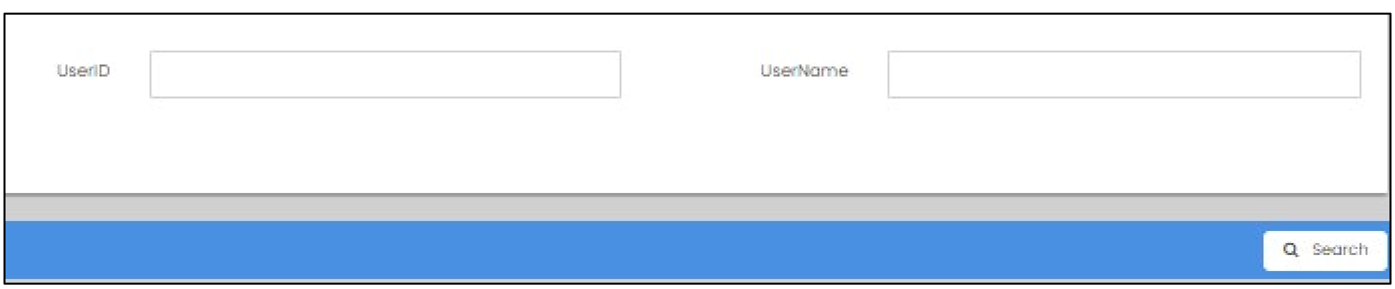
Running the user access report and viewing data:

- Go to Administration/Reporting/Operational reports/User Reports and click on the User Access Report v2

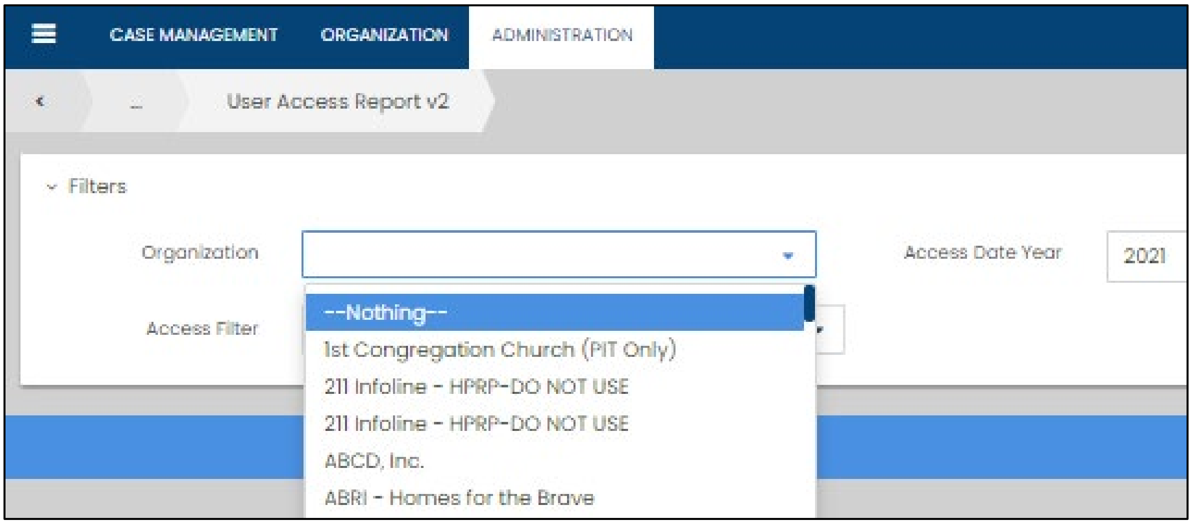


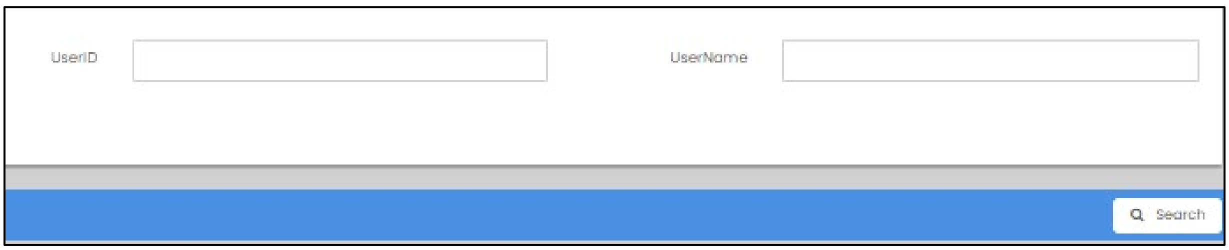
Search criteria include:

- Organization Name
- Access Date Year – report setup defaults to current year
- Access Filter – Clients with or without activity within the Organization
- UserID
- UserName
    - *Note: There is a 24 hour refresh in HMIS – users will see data current as of the previous day

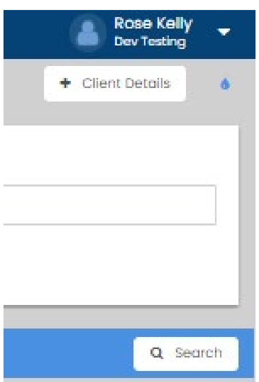


- Filter by an Organization name or select '--Nothing--' at the top of the list to pull in all Organizations
- Enter the Access Date Year you would like to review
    - Report set up defaults to current year
- Additional search fields UserID and UserName are available for drill down



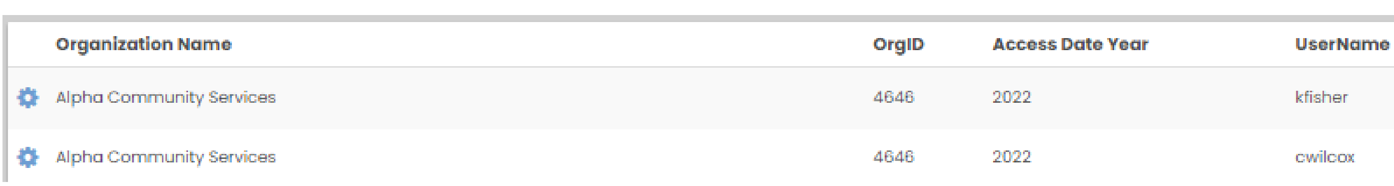


- When all search criteria have been entered click on Search



Sample Report Output:

- Organization Name, Organization ID, Access Date Year, Username
- Number of records accessed by Username by month, quarter, and current total
    - The grouping is meant to help with identifying unexpected usage such as a spike in numbers

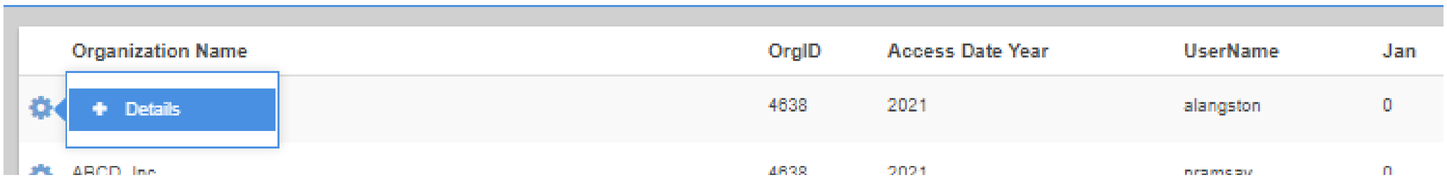


Organization Name	OrgID	Access Date Year	UserName
Alpha Community Services	4646	2022	kfisher
Alpha Community Services	4646	2022	cwilcox

Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Total
1	4	3	8	2	3	3	8	3	2	1	6	5	3	0	8	30
1	1	0	2	1	1	4	6	3	3	0	6	0	0	0	0	14
1	0	2	3	1	1	1	3	0	0	0	0	0	0	0	0	6

Drill Down Options:

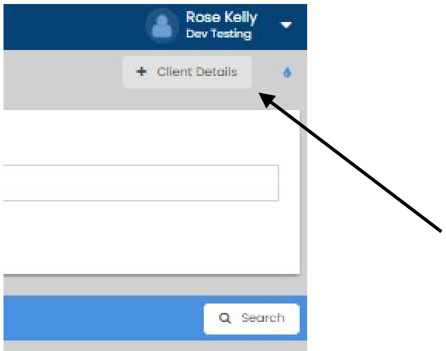
- **User Level**
  - **Details** – click on the cog wheel to the left of the row you want to review
  - Provides detail at the user level for further review
    - Client name is provided in output but not shown here



Organization Name	UserID	UserName	ClientID
Chrysalis Center	152044	xjwalsh	212026

Access Date	Access Date Year	AccessCount	Enrollments in Org?
2/5/2021	2021	4	Client DOES NOT have enrollments in Org

- **Client Level**
  - To review access details for a specific client record
  - Click on Client Details on the top right and fill in any specific search criteria you would like to review
    - Organization Name
    - Access Date Year
      - Access date range
    - UserID
  - UserName
  - ClientID
    - Click on Search



Sample Report Output:

- Client name is provided in output but not shown here

Organization Name	UserID	UserName	ClientID	Access Date	Access Date Year	AccessCount	Enrollments in Org?
Total Rows: 144							
Inspirica, Inc.	50623	mmanda	239317	4/14/2021	2021	31	Client has enrollments in Org
Homes with Hope Inc.	67686	xkmahar2	239317	6/5/2020	2020	3	Client has enrollments in Org
Homes with Hope Inc.	67686	xkmahar2	239317	6/10/2020	2020	19	Client has enrollments in Org
Supportive Housing Works - CT RRH - Fairfield County CAN (DOH)	87864	jkubickica	239317	11/14/2019	2019	7	Client has enrollments in Org

- **Exporting the output to Excel:**
  - Use the teardrop icon under your username
  - Click on the Excel export icon
  - All sections of the report can be exported in Excel