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
  o The grouping is meant to help with identifying unexpected usage such as a spike in numbers

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>OrgID</th>
<th>Access Date Year</th>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha Community Services</td>
<td>4646</td>
<td>2022</td>
<td>kfisher</td>
</tr>
<tr>
<td>Alpha Community Services</td>
<td>4646</td>
<td>2022</td>
<td>cwilcox</td>
</tr>
</tbody>
</table>
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

- **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

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>UserId</th>
<th>Username</th>
<th>ClientID</th>
<th>Access Date</th>
<th>Access Date Year</th>
<th>AccessCount</th>
<th>Enrollments In Org</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspire, Inc.</td>
<td>50623</td>
<td>minnie1</td>
<td>239337</td>
<td>4/14/2020</td>
<td>2020</td>
<td>31</td>
<td>Client has enrollments in Org</td>
</tr>
<tr>
<td>Homes with Hope Inc</td>
<td>27056</td>
<td>viro12</td>
<td>239337</td>
<td>5/20/2020</td>
<td>2020</td>
<td>9</td>
<td>Client has enrollments in Org</td>
</tr>
<tr>
<td>Homes with Hope Inc</td>
<td>27056</td>
<td>viro12</td>
<td>239337</td>
<td>5/20/2020</td>
<td>2020</td>
<td>10</td>
<td>Client has enrollments in Org</td>
</tr>
<tr>
<td>Supportive Housing Works - CT RH1 - Fairfield County CAN (201)</td>
<td>27056</td>
<td>viro12</td>
<td>239337</td>
<td>5/26/2020</td>
<td>2020</td>
<td>7</td>
<td>Client has enrollments in Org</td>
</tr>
</tbody>
</table>

- 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