



SAGE USER MANUAL



Contents

INTRODUCTION

Sage HMIS Reporting Repository (Sage)
Sage,

Sage

Sage

Sage

Sage

Terms Used in Sage

Sage

Sage
Sage

- User Level *Sage.*
- My Dashboard
- Entity *Sage*

- Quick Connector Box

- Reports *Sage*

- Notebook
- Launchpad

Accessibility



Sage

purple words Sage

purple wording

Sage

DASHBOARDS

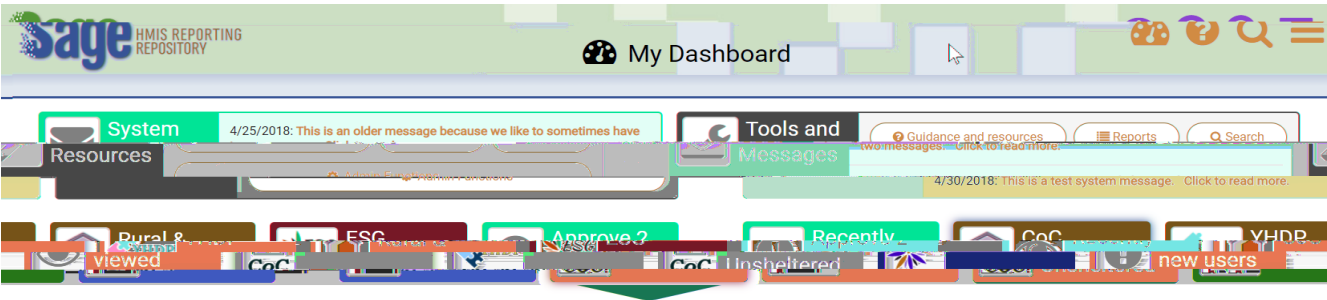
My Dashboard

Sage

personalized “

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Sage

quick connector box

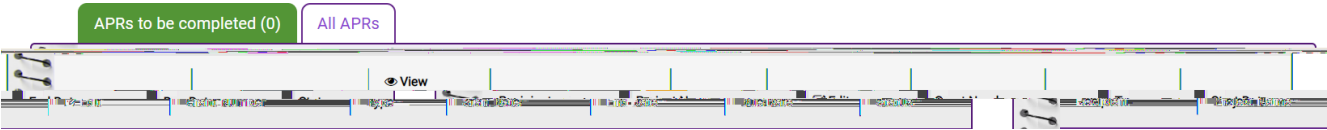
Sage

Sage

Sage

My Notebooks

Sage



My Access
Sage



1 APRs to be completed (13)

All APRs

Filter by Recipient:

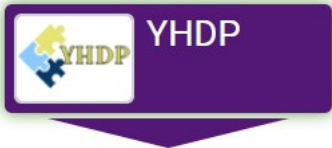
Download as Excel

Copy to clipboard

Activate filtering

pe	Date	End Date	Due Date	Status	View	Recipient	Project Name	Start	Edit	Grant Number	Ty
----	------	----------	----------	--------	------	-----------	--------------	-------	------	--------------	----

YHDP access




Rural and Unsheltered program access



Sage Recipient – CoC position,



Switch to CoC - IL-510 CoC - IN-502

Now viewing **CoC - IL-510**

! Reports to be completed (3)

All reports

Download as Excel

Copy to clipboard

Activate filtering

Filter

Filter by Recipient

Project Name	Edit	Grant Number	Type	Start Date	End Date	Due Date	Status	View	Recipient
SSO:Coordinated Entry		1/1/2022	3/31/2022	6/29/2022	Not Started		IL-510: Recipient 91753	Systematizing Options and Services	IL9999H4C099999

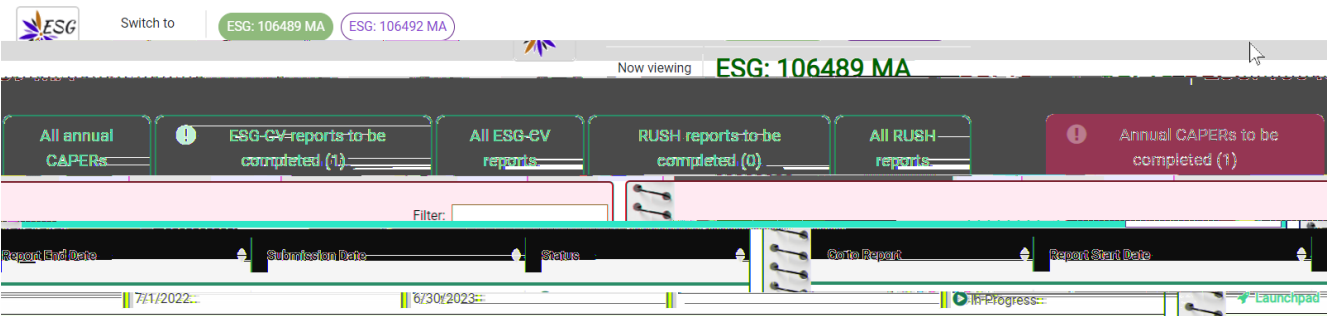
ESG access



Recipient – ESG

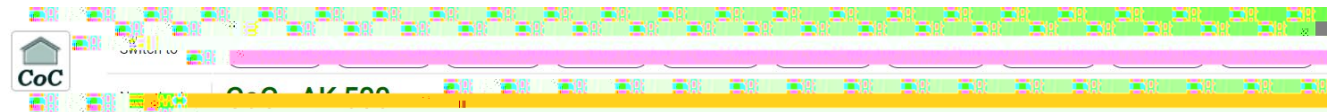
Data Entry

Sage.



NAVIGATING SAGE

Changing entities



Recently viewed

Navigation bar tools

- ✓
- ✓
- ✓
- ✓

Sage

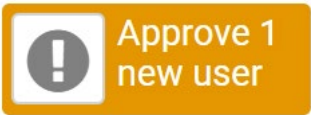
System Messages

Sage

Sage

Sage

Approving A User



Sage

Sage

SAGE USER ACCOUNTS

Sage

Sage

➤ _____

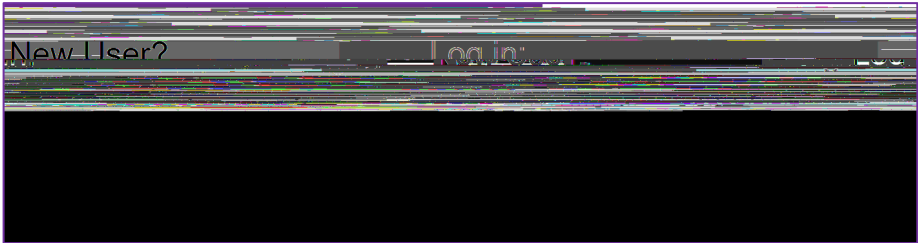
Sage

➤ _____ Sage

Sage user accounts

sage

Sage
Create an account



Position

Entity
Begin typing the CoC organizations name, ESG jurisdiction name, or CoC number. You must select a drop down name – not type your own.

Delete

_____ ▼

_____ Type your CoC Number/Entity Name to begin search

🗑 DELETE

Please note: You must have at least one Position and Entity selected in order to request an account.



-
-
-
-

Account Created

Request Account

Request Account

Sage

Sage

Sage.

User Account Basics




Sage














Sage

Sage

Sage

User Account Positions

POSITION “What do I do”	DESCRPITION	AFFILIATION “What do I see”
	<div><div>Sage</div><div>Sage</div></div>	<div><div>CoC</div><div>YHDP</div><div>U&R</div></div>
	<div><div>Sage</div></div>	

	<i>Sage</i>	
	<i>Sage</i>	
		  
	<i>Sage</i>	   
		   
	<i>Sage</i>	

User Account Levels

Position	User Levels	Description	Approval by
	Data Entry	add and edit APRs	or
	Data Entry/Account Admin	add and edit APRs approve other users	or
	Data Viewer	view only	or
	Data Viewer:	view only	
	Data Viewer/Account Admin	view only approve other users	
	Data Entry	add and edit APRs	
	Data Entry/Account Admin	add and edit APRs approve other users	

	Data Viewer	view only	
	Data Viewer	view only	

Adding another association to an account

2. Add Another Association

+ Add Another Association

Cancel

Update Account

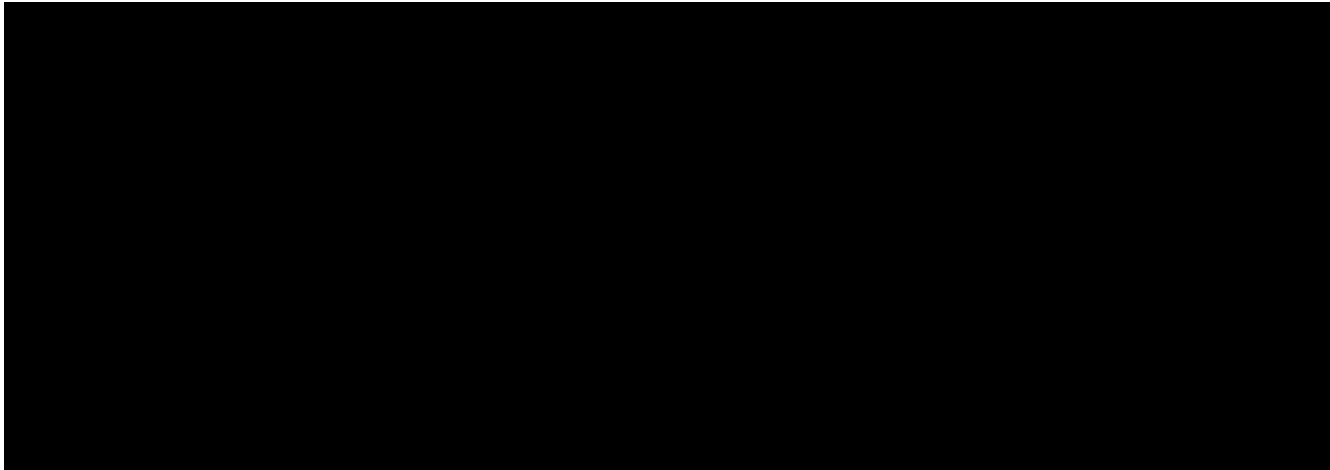
3. POSITION
Sage

Sage

POSITION	ENTITY <i>Begin typing the CoC organizations name, ESG jurisdiction name, or CoC number. You must select a drop down name – not type your own.</i>	USER LEVEL	DELETE
<div> <div>Recipient - CoC Grant</div> <div>Recipient - ESG Grant</div> <div>Continuum of Care</div> <div>HUD Field Office</div> <div>HUD Administration</div> </div>	<div>Type your CoC Number/Entity Name to begin s</div> <div>CT-503 Housing Authority of the City of Waterbury</div> <div>ESG Waterbury - CT</div>	<div>TBD</div> <div>Data Entry and Account Admin</div> <div>Data Entry and Account Admin</div>	<div> <div>DELETE</div> <div>DELETE</div> <div>DELETE</div> </div>

Account Approval and Authorization

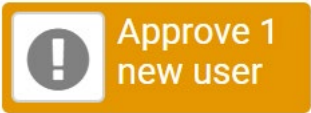
Sage



-
-
-

Sage

Sage



Approve

Sage

When to Approve or Deny an account

Sage

Sage

✓

✓

Sage

Sage

Sage

✓

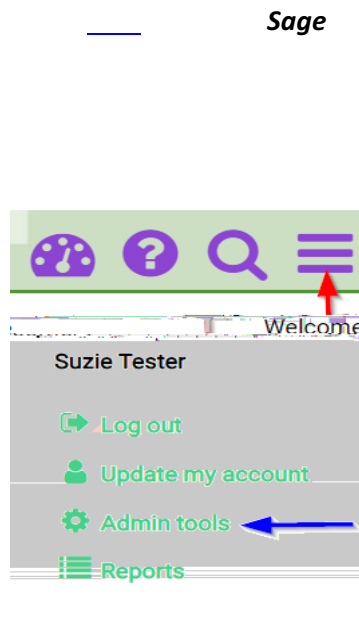
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Deleting or Closing Sage User Accounts



Find Users

Show pending users

Find an existing user

Type first or last name

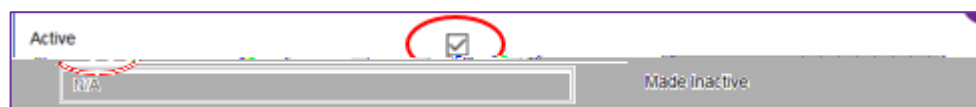
GO

Add a completely new user

EDIT

A screenshot of the Sage user management interface. At the top, there are buttons for 'Show pending users', 'Find an existing user', 'GO', and 'Add a completely new user'. Below these buttons, a message states: '(search results have active users at the top, inactive at the bottom)'. A table of users is displayed with the following columns: Last name, First name, Username, Agency, Phone, Email, and Last logon time. The first row of data shows a user named 'Smith, Jenny' with the username 'jenny@test.com' and phone number '(555) 555-1234'. A red circle highlights the 'EDIT' button in the bottom left corner of the table.

	Last name	First name	Username	Agency	Phone	Email	Last logon time
Active	Smith	Jenny	jenny@test.com	DCI	(555) 555-1234	jenny@test.com	



LOG IN FAQs

I forgot my password

Sage

Search for reports by their title, CoC category, or CoC name

status) by recipients that are affiliated with a CoC	CoC - All APRs - Recipients and Status	Lists APRs (number, component, dates, latest s
units, component type) affiliated with a Recipient or CoC	CoC - All CoC Grants	Lists all grants (number, award amounts, beds/
CoC Recipient - Grants and Submissions		Lists all grants and submissions of a CoC recipient
CoC and Recipient Map/Grants		Shows locations of CoC facilities across the United States with a map of CoC status, number of

Run the report

View here

Download as Excel file

Email me

SPECIAL FUNCTIONS
HELP



Active Filtering

-
-
-

Active APRs

Showing 1 to 8 of 8 entries **Filtered from 189 total** Show 20 entries Download as Excel Copy PH Planning Reset filtering

Status	Project Name	Grant Number	SSO	Subtype	Start Date	End Date	Due Date

Jump to buttons

Test a CSV

Sage

Sage

not

Sage

Sage

Test run a report

Upload a CSV-APR or CSV-CAPER to generate a paper report

Please select a report that you wish to test from the dropdown list below:

Select A Report

Select A Report

CSV-APR FY2020

CSV-APR FY2022

CSV-CAPER FY2020

CSV-CAPER FY2022

CSV-CE APR

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Sage

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Status Definitions

Status	Status Definition

Filter by Grant Type:

- HMIS
- PH
- PH-CC
- Planning
- SH
- SSO
- TH

Filter by Status:

- Submitted
- Rejected
- Awaiting Director Review
- In Progress
- In Progress - CSV-APR Exception Granted
- Not Started

Download as Excel Copy to clipboard

function keys

Common Terms used in Reporting

Active client

Adult—

Annual assessment

Data Collection Stage

Child

Chronically homeless individual

Comparable database

Comma Separated Value (CSV)

HMIS implementation

Household without children

Household with children and adults–

Households with only children

Leaver

Program component

Recipient

Stayer

Unknown household type

Victim service provider

Veteran

Youth

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