



## Chapter 35: Reports | Data Analytics Module

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## Chapter 35: Reports | Data Analytics Module

This Chapter provides procedures for navigating, accessing, modifying, saving, and exporting reports contained in the **Reports (MicroStrategy) Module**.

This Chapter describes actions for Grantee Users and HUD Users, and is divided into subsections. The following actions are covered in this section:

### Grantee Users

Menu Option	Subsection	Action
Reports	C1 – F2	Access, modify, save, and export reports.

### HUD Users

Menu Option	Section	Action
Reports	C1 – F2	Access, modify, save, and export reports.

## A. Data Analytics Module Access

The **Data Analytics** Module contains access to Report actions.

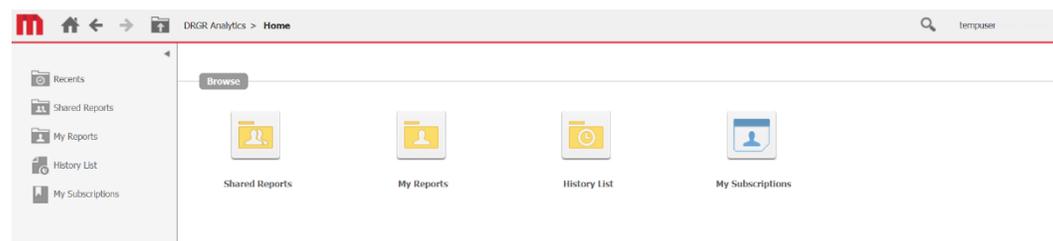
### A1. Grantee and HUD | User Access

<b>User Role:</b> Grantee and HUD User	<b>Menu Option:</b> Data Analytics Module
<b>Purpose:</b> Allow Grantee and HUD Users to access the <b>Data Analytics</b> module.	
<input checked="" type="checkbox"/> Complete the following steps to access the <b>Data Analytics</b> module:	
1 Select the <b>Data Analytics</b> module, or  icon, located in the navigation bar.	
2 This opens the dropdown menu for the <b>Data Analytics</b> module.	

- Once MicroStrategy loads in a new browser window or tab, one or more of the following Reports folders will be displayed. Select the <DRGR Analytics> folder.



- The “Home” page will load. From this page, all reporting actions are available.



## B. MicroStrategy Reports Summary

### B1. MicroStrategy Reports Overview

MicroStrategy Reports contain data entered or generated by the DRGR System (no data entry takes place in MicroStrategy). Reports are a great tool to review and troubleshoot various elements of Grant-funded programs including financial and performance data. Reports can be accessed, filtered, modified and saved in the web browser, or exported into Excel or PDF.

HUD released <DRGR Analytics> folder in MicroStrategy in 2020, and it works the same way as <DRGR OLAP>. The <DRGR OLAP> folder will remain available until mid-2021, at which time <DRGR Analytics> will replace <DRGR OLAP>.

**TIP!** Refer to Appendix A to identify the DRGR Analytics reports which correspond with the legacy DRGR OLAP reports. Also see the Data Analytics Fact Sheet under Release 8.0 on the HUD Exchange.

TA Providers should continue to use reports in the “TA Provider” folder in <DRGR OLAP> but can also use the global reports available in <DRGR Analytics>. TA reports will migrate to <DRGR Analytics> in a future System release. Non-TA Providers can use either report folder but are encouraged to use <DRGR Analytics>.

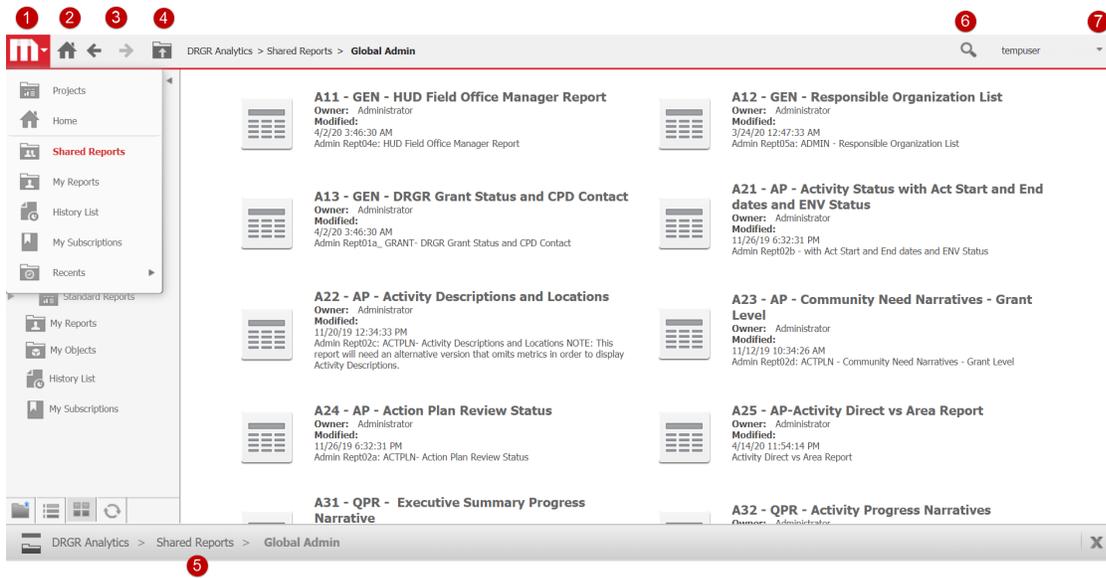
There are six types of shared reports in MicroStrategy: Global Admin, Global Finance, Global Performance, Global Compliance, Global History, and Global Grants. Grantees are encouraged to use these reports for tracking progress, quality control, and management of Projects and Activities.



Global Report Folder	Contents
Global Admin	Administration Report names begin with <b>"A##"</b> and contain summaries of data found in the <b>Administration</b> module including responsible organizations and user information such as certification status, roles, and associations. Administration Reports also include summary reports on Grant status, activity status, Action Plan review status, Performance Report submit and review status, and other summary information from across DRGR's modules.
Global Finance	Financial Report names begin with <b>"F##"</b> and contain data entered by users in the <b>Manage My Financials</b> module including: a) budgets, drawdowns, obligations, expenditures at the Grant-, project- and activity-level; b) program income accounts and receipts; and c) program fund and program income vouchers.
Global Performance	Performance Report names begin with <b>"P##"</b> and contain data entered by users into the <b>Manage My Grants</b> module: a) cumulative accomplishments such as housing units, FHEO data, and other performance measures (i.e. # of properties); b) area vs. direct benefit information; and c) projected vs. actual accomplishment data.
Global Compliance	Compliance Report names begin with <b>"C##"</b> and contain useful data entered by users into the <b>Manage My Compliance</b> module including flags and monitoring events.
Global History	History Report names begin with <b>"H##"</b> and allow users to view changes to data over time. The "Global History" folder is designed for audits and allows users to trace the history of Grants, vouchers, financial and other data.
Global Grants	Grant report names begin with <b>"G##"</b> and allow users to see information at the Grant level other than financial reports. See the Global Finance folder for financial reports.

## B2. MicroStrategy Basic Navigation

This section provides the basic navigation for MicroStrategy. See the chart below for a description of the numbered features.



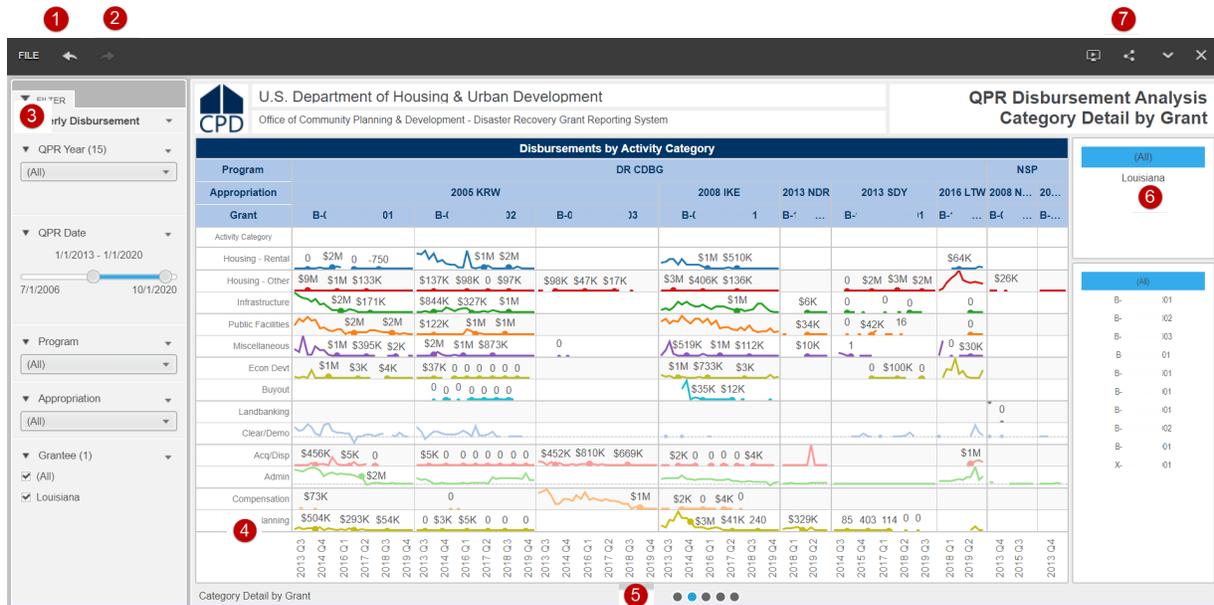
#	Icon	Function
1		Allows users to navigate to different pages/folders within MicroStrategy.
2		Allows users to navigate back to the “Home” page.
3		Allows users to navigate among previously viewed pages using the back and forward buttons. Use these buttons to toggle back and forward. <div style="border: 1px solid black; background-color: #8B4513; color: white; padding: 5px; margin-top: 10px;"> <b>TIP:</b> Use the Microstrategy back and forward navigation buttons, not your browser’s buttons!           </div>
4		Allows users to navigate to the previous level within the folder hierarchy.
5		Allow users to view a history of the folders previously accessed to arrive at the current page. Users can also return to previous pages by clicking on the page name (“cookie crumb”).
6		Opens a dialogue box that allows users to search MicroStrategy.
7		Launches a dropdown menu of different MicroStrategy application-related links: Preferences, Help, About MicroStrategy, and Logout.

The remainder of this page is intentionally left blank.



### B3. Dashboard Basic Navigation

This section provides the basic navigation for Dashboards which can be found within select “Global Reports” folders and are identified by the subject term “DASH” in the report title. MicroStrategy Dashboards are visual displays of key metrics and trends for records which are supported by one or more reports. These interactive charts and graphs show progress by Grant, activity category, or Grantee projects. See the chart below for a description of the numbered sections.



#	Function
1	Allows users to export the Dashboard to PDF, add to “History List”, and Subscribe to “History List”.
2	Allows users to navigate among previously viewed pages using the back and forward buttons.
3	Allows users to modify the filters for the report such as the subject area, program, and appropriation, among others. This determines what will appear on the micro-chart graphic.
4	Allows users to visualize the data based on the filters selected which helps users detect trends across categories.
5	Panel select dots allow users to toggle between different visualizations of the information.
6	Allows users to view information on which Grantee and Grant is being viewed in the micro chart.
7	Allows users to view the Dashboard in presentation mode, share the dashboard with other DRGR Users, show the MicroStrategy navigation bar, or close the report.

## C. Accessing Reports and Dashboards

### C1. Grantee and HUD | Accessing Shared Reports

Shared Reports contain a series of pre-designed reports separated by category (e.g., Financial, Performance, etc.). The folders labeled “Global” are available for Grantee and HUD Users while the folders labeled “HUD” are only accessible by specific HUD users.

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports								
<b>Purpose:</b> Allow Grantee and HUD Users to access Shared Reports.									
<b>Complete the following steps to access Shared Reports:</b>									
<p>1 From the “Home” page, select “Shared Reports”.</p>									
<p>2 The “Shared Reports” page will load and display a new set of folders. Select the desired “Global” folder to access reports by category (e.g., Financial, Performance, etc.).</p>									
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; text-align: left; padding: 5px;"> <p><b>Global Admin</b> Owner: Administrator Modified: 3/24/20 12:47:05 AM</p> </td> <td style="width: 50%; text-align: left; padding: 5px;"> <p><b>Global Compliance</b> Owner: Administrator Modified: 10/17/19 10:40:11 PM</p> </td> </tr> <tr> <td style="text-align: left; padding: 5px;"> <p><b>Global Finance</b> Owner: Administrator Modified: 4/9/20 3:25:04 PM</p> </td> <td style="text-align: left; padding: 5px;"> <p><b>Global History</b> Owner: Administrator Modified: 4/2/20 3:46:22 AM</p> </td> </tr> <tr> <td style="text-align: left; padding: 5px;"> <p><b>Global Performance</b> Owner: Administrator Modified: 4/2/20 3:46:22 AM</p> </td> <td style="text-align: left; padding: 5px;"> <p><b>HUD Office</b> Owner: Administrator Modified: 3/24/20 12:46:39 AM</p> </td> </tr> <tr> <td style="text-align: left; padding: 5px;"> <p><b>HUD Super Users</b> Owner: Administrator Modified: 3/24/20 12:47:15 AM</p> </td> <td></td> </tr> </table>		<p><b>Global Admin</b> Owner: Administrator Modified: 3/24/20 12:47:05 AM</p>	<p><b>Global Compliance</b> Owner: Administrator Modified: 10/17/19 10:40:11 PM</p>	<p><b>Global Finance</b> Owner: Administrator Modified: 4/9/20 3:25:04 PM</p>	<p><b>Global History</b> Owner: Administrator Modified: 4/2/20 3:46:22 AM</p>	<p><b>Global Performance</b> Owner: Administrator Modified: 4/2/20 3:46:22 AM</p>	<p><b>HUD Office</b> Owner: Administrator Modified: 3/24/20 12:46:39 AM</p>	<p><b>HUD Super Users</b> Owner: Administrator Modified: 3/24/20 12:47:15 AM</p>	
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<p><b>HUD Super Users</b> Owner: Administrator Modified: 3/24/20 12:47:15 AM</p>									

### C2. Grantee and HUD | Accessing My Reports

My Reports contains reports that DRGR Users saved for future use. DRGR Users can save their favorite reports located in “Shared Reports” as-is or modify and save the report to avoid reformatting the report



each time. Reports saved in “My Reports” will keep the same format but will update with the latest data when accessed.

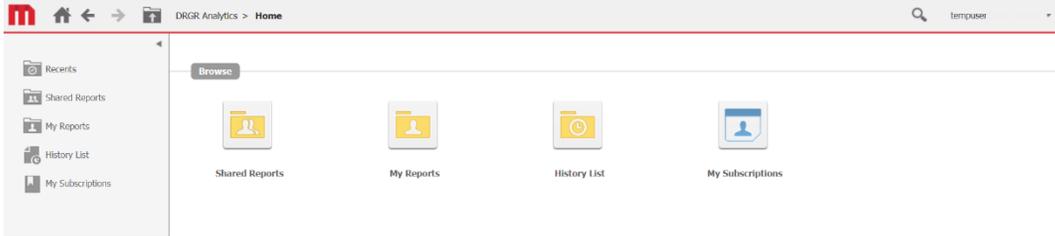
<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to access My Reports.	
<input checked="" type="checkbox"/> <b>Complete the following steps to access My Reports:</b>	
1 From the “Home” page, select “My Reports”.	
2 The “My Reports” page will load. Select the desired report to load the report.	

### C3. Grantee and HUD | Accessing History List

Unlike “My Reports”, the “History List” folder contains point-in-time reports generated by DRGR Users that: (

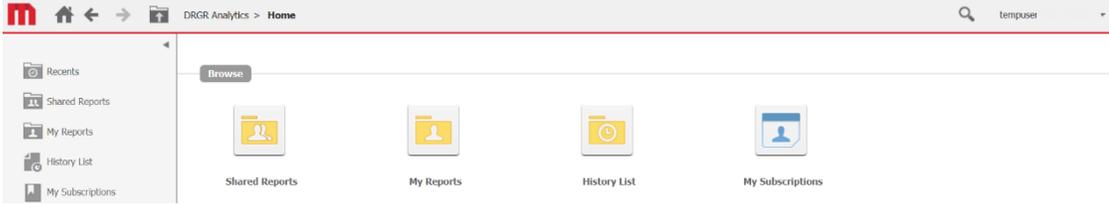
- **Save a report to the “History List”** – the report will reflect data from the day it was saved to the “History List”.
- **Subscribe to a report** – the report will be automatically delivered to the “History List” and reflect data based on the frequency of the report subscription (e.g. every Monday).

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to access the History List.	
<input checked="" type="checkbox"/> <b>Complete the following steps to access the History List:</b>	

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<p>1 From the “Home” page, select “History List”.</p> 	
<p>2 The “History List” page will load. Select the desired report to load. Users can also export the report by selecting the icons under the “Action” heading, or permanently delete the report from the “History List” by selecting “Remove.”</p> 	

#### C4. Grantee and HUD | Accessing My Subscriptions

The “My Subscriptions” folder allows users to update or remove existing established subscriptions.

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to access My Subscriptions.	
<p> Complete the following steps to access My Subscriptions:</p>	
<p>1 From the “Home” page, select “My Subscriptions.”</p> 	



<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
---	-----------------------------

2 The “History List Subscriptions” page will load. Select the desired subscription to under the “Action” heading to edit the subscription, or permanently remove the subscription from “History List Subscriptions” by selecting “Unsubscribe.”

### D. Modifying Reports

This section provides the basic navigation for modifying reports.

Project Number	Project Title	Activity Number	Activity Title	Activity Type	Activity National Objective	Project Budget	Activity Budget	Activity % of Project
<b>Total</b>						<b>\$15,000,000.00</b>	<b>\$15,000,000.00</b>	<b>100%</b>
NJ RRG	NJ RRG	NDR-DEP-RRGP-ADMIN	NDR DEP RRG ADMIN	Administration	NA	\$10,000,000.00	\$287,365.63	3%
NJ RRG	NJ RRG	NDR-DEP-RRGP-PL	NDR DEP RRG PL	Planning	NA	\$10,000,000.00	\$150,000.00	2%
NJ RRG	NJ RRG	NDR-DEP-RRGP	NDR DEP RRG	Planning	NA	\$10,000,000.00	\$9,438,527.81	94%
NJ RRG	NJ RRG	NDR-DEP-RRGP-RARITAN RIVER	NDR DEP RRG Raritan River	Planning	NA	\$10,000,000.00	\$124,106.56	1%
NJ Toolkit	NJ Toolkit	NDR-DEP-TK	NDR DEP TK	Planning	NA	\$5,000,000.00	\$4,000,000.00	80%
NJ Toolkit	NJ Toolkit	NDR-DEP-TK-ADMIN	NDR DEP TK ADMIN	Administration	NA	\$5,000,000.00	\$250,000.00	5%
NJ Toolkit	NJ Toolkit	NDR-DEP-TK-PL	NDR DEP TK PL	Planning	NA	\$5,000,000.00	\$750,000.00	15%
Long Term Commitment	Long Term Commitment	NDR-LTC	NDR Long term Commitment	NDR - Resilience Value	NA	\$0.00	\$0.00	
Outcome Values	Outcome Values	NDR-DEP-RRGP-ECONOMIC-OV	NDR DEP RRG ECONOMIC OV	NDR - Economic Value	NA	\$0.00	\$0.00	

#	Function
1	There are five tabs at the top of the page: “Report Home,” “Tools,” “Data,” “Grid,” and “Format.” The “Home,” “Tools,” and “Data,” tabs contain a dropdown menu with different options based on the tab selected. The “Grid” and “Format” tabs have icons only.
2	The icons below the tabs are unique to the tab selected. Each time the user selects a new tab, the icons beneath the tab will change. The icons provide quick access to the same functions contained in the dropdown menus described above.
3	The “Page-By Axis” allows users to filter the information displayed in the report below. Each report will be prepopulated with unique “Page-By Axis” selections. For example, if a user has access to more than one Grant, the “Page-By Axis” will identify that the report is showing only information for one Grant at a time. From the “Page-By Axis”, the user can select which Grant the user would like to view/edit.



4	The report column headings describe each column. Any data including text or dates (called ‘Attributes’) displays on the left side of the report while any data that is numeric (called ‘Metrics’) displays on the right. When the report displays, the data in the left columns show as merged cells any time data in the columns in each adjacent row repeats. Basically, this means that data columns on the left side group the data to the right.
5	The Report that is displayed is contingent on the options the user has selected in items 1-4 above.

### D1. Grantee and HUD | Moving Columns

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports																																									
<b>Purpose:</b> Allow Grantee and HUD Users to move columns.																																										
<input checked="" type="checkbox"/> <b>Complete the following steps to move columns:</b>																																										
<p>1 Once the desired report has loaded, users can move any column to left or right. The first way to accomplish this is by placing the cursor over the column header and using the left mouse button to drag and drop the column to the left or right within the report.</p>																																										
<p>2 The second option involves using the right mouse button over the column. Place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select <b>&lt;Move&gt;</b> followed by <b>&lt;Left&gt;</b> or <b>&lt;Right&gt;</b>. It is important to note that attribute data cannot be moved to the right of metric data and vice versa.</p>	<table border="1" style="font-size: small; margin-top: 10px;"> <thead> <tr> <th rowspan="2">Measure Category ▲</th> <th colspan="3">Low</th> <th colspan="2">Mod</th> </tr> <tr> <th>Projected</th> <th>Actual</th> <th>Actual to Projected</th> <th>Projected</th> <th>Actual</th> </tr> </thead> <tbody> <tr> <td>Activity Measure Type ▲</td> <td></td> <td></td> <td></td> <td>159,077</td> <td>8</td> </tr> <tr> <td># of Persons</td> <td></td> <td></td> <td></td> <td>198</td> <td>0</td> </tr> <tr> <td># of Linear feet of Public Improvements</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td># of public facilities</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td># of Persons</td> <td>36,118</td> <td>0</td> <td>0%</td> <td>14,705</td> <td>0</td> </tr> </tbody> </table>	Measure Category ▲	Low			Mod		Projected	Actual	Actual to Projected	Projected	Actual	Activity Measure Type ▲				159,077	8	# of Persons				198	0	# of Linear feet of Public Improvements						# of public facilities						# of Persons	36,118	0	0%	14,705	0
Measure Category ▲	Low			Mod																																						
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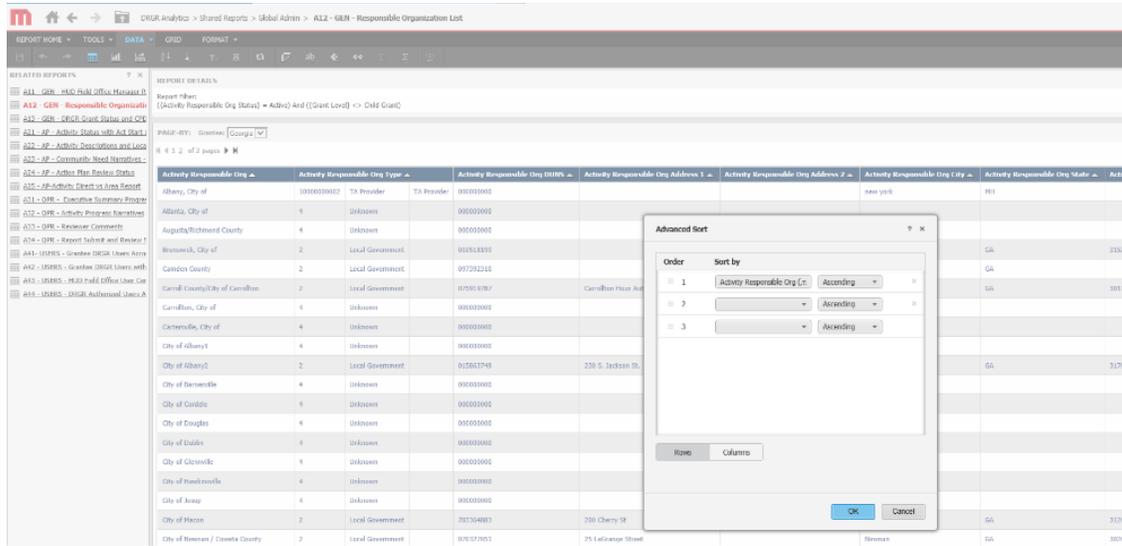
### D2. Grantee and HUD | Sorting Columns

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to sort columns.	
<input checked="" type="checkbox"/> <b>Complete the following steps to sort columns:</b>	
<p>1 Once the desired report has loaded, users can change the sort order of any column. To accomplish this, place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select <b>&lt;Sort&gt;</b> followed by <b>&lt;Ascending&gt;</b> or <b>&lt;Descending&gt;</b> to alter the sorting order of the rows for that column.</p>	



User Role: Grantee and HUD Users				Menu Option:  Reports			
Activity Responsible Org ▲	Activity Number ▲	Activity Type ▲	Activity Title ▲	Measure Category ▲	Low		
				Activity Measure Type ▲	Projected	Actual	Actual to Projected % ▼
Total					296,382	10	0%
Passaic County	12-CDE-DR-001-PF-LM			Persons	275	0	0%
Passaic County	12-CDE-DR-001-PF-LM		Passaic County (Bloomingdale) - Public Facilities	# of Linear feet of Public Improvement	0	0	0%
Passaic County	12-CDE-DR-002-PF-LM		Passaic City - Public Facilities	# of public facilities	0	0	0%
Passaic County	12-CDBG-DR-002-	Dike/dam/stream-river bank	Passaic City - Public Facilities	# of Persons	36,118	0	0%

- Users can also change the row sort order for up to three columns at a time. Select the “Data” tab followed by the **<Sort>** option. Users choose a column name and specify the sort order accordingly. It is important to note that when the column name options show “ID” or “DESC,” choose “DESC”. “DESC” specifies the order based on the text displayed. “ID” is an internal numeric index assigned by DRGR that is not useful for sorting



### D3. Grantee and HUD | Create a Filter

User Role: Grantee and HUD Users		Menu Option:  Reports	
<b>Purpose:</b> Allow Grantee and HUD Users to create a filter.			
Complete the following steps to create a filter:			
<ol style="list-style-type: none"> <li>Once the desired report has loaded, users can add any column to the “Page-By Axis” to filter which data appears in the report (as opposed to all data pre-loaded into the report). The first way</li> </ol>			



**User Role:** Grantee and HUD Users      **Menu Option:** Reports

to accomplish this is by placing the cursor over the column header and using the left mouse button to drag and drop the column to the “Page-By Axis” in the report.

- The second option involves using the right mouse button over the column. Place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select **<Move>** followed by **<To Page-By Axis>**.

**REPORT DETAILS**

Report Filter:  
 ((Grant Status) = Active) And ((Grant Level) <> Child Grant) And (Set of ( Activity Measure Type, Activity Measure Category, Activity Id ) where ((Activity Projected) > 0) Or Set of ((QPR Actual Measure Quantity) > 0))

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1 of 2 pages

Activity Responsible Org ▲	Activity Number ▲	Activity Type ▲	Activity Title ▲	Measure Category ▲	Total		
					Projected ▼	Actual ▼	Actual to Projected % ▼
<b>Total</b>					1,554	1,645	0%
Passaic County	12-CDBG-DR-001-PF-LM	Rehabilitation/reconstruction of a public improvement	Passaic County (Bloomingdale) - Public Facilities		51	0	0%
Passaic County	12-CDBG-DR-001-PF-LM	Rehabilitation/reconstruction of a public improvement	Passaic County (Bloomingdale) - Public Facilities				0
Passaic County	12-CDBG-DR-002-PF-LM	Dike/dam/stream-river bank repairs	Passaic City - Public Facilities				0
Passaic County	12-CDBG-DR-002-PF-LM	Dike/dam/stream-river bank repairs	Passaic City - Public Facilities	# of Persons	67		14,705

- Regardless of the method chosen, once the selected column is moved to the “Page-By Axis,” the report is filtered by the header of said column. For example, once the “Activity Title” column is moved to the “Page-By Axis,” the report is filtered to only show one Activity at a time.

**REPORT DETAILS**

Report Filter:  
 ((Grant Status) = Active) And ((Grant Level) <> Child Grant) And (Set of ( Activity Measure Type, Activity Measure Category, Activity Id ) where ((Activity Projected) > 0) Or Set of ( Activity Measure Type, Activity Measure Category, Activity Id ) where ((QPR Actual Measure Quantity) > 0))

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Activity Title: Acquisition - Standard CDBG, Passaic County

Activity Responsible Org ▲	Activity Number ▲	Activity Type ▲	Measure Category ▲	Total			
				Activity Measure Type ▲	Projected ▼	Actual ▼	Actual to Projected % ▼
<b>Total</b>					20	10	50%
Passaic County	12-CDBG-DR-014-HB-LM	Acquisition - buyout of residential properties	# of Housing Units		5	0	0%
Passaic County	12-CDBG-DR-014-HB-LM	Acquisition - buyout of residential properties	# of Parcels acquired voluntarily		5	5	100%
Passaic County	12-CDBG-DR-014-HB-LM	Acquisition - buyout of residential properties	Total acquisition compensation to owners		5	5	100%
Passaic County	12-CDBG-DR-014-HB-LM	Acquisition - buyout of residential properties	# of Singlefamily Units		5	0	0%



<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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4 Now, users can select which “Activity Title” they would like to view from the dropdown menu.

**REPORT DETAILS**

Report Filter:  
 ({{Grant Status}} = Active) And ({{Grant Level}} <= Child Grant) And (Set of ( Activity Measure Type, Activity Measure Category, Activity Id ) where ({{Activity Projected}} > 0) Or Set of ( Activity Measure Type, Activity Measure Category, Activity Id ) where ({{QPR Actual Measure Quantity}} > 0))

PAGE-BY: Program: DR CDBG | Appropriation: 2011 DF3:2011 Multiple Disasters | Grantee: New Jersey | Grant: B | 001

Activity Title: Acquisition - Standard CDBG, Passaic County

Activity Responsible Organization	Measure Category	Activity Measure Type	Total		
			Projected	Actual	Actual to Projected %
Total			20	10	50%
Passaic County	of residential properties	# of Housing Units	5	0	0%
Passaic County	of residential properties	# of Parcels acquired voluntarily	5	5	100%

#### D4. Grantee and HUD | Grouping Columns

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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**Purpose:** Allow Grantee and HUD Users to group columns.

Complete the following steps to group columns:

- 1 Once the desired report has loaded, users can group columns and move rows to columns. Right click on the column header with the desired rows and select **<Move>** followed by **<To Columns>**.  
  
 To move columns to rows, drag and drop the column header by the rows. A yellow vertical line will appear indicating the placement of the column.

Measure Category	Low			Mod	
	Projected	Actual	Actual to Projected	Projected	Actual
Drill	159,077	8			
# of Persons				198	0
# of Linear feet of Public Improvements					
# of public facilities					
# of Persons	36,118	0	0%	14,705	0

#### D5. Grantee and HUD | Undoing Changes

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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**Purpose:** Allow Grantee and HUD Users to undo changes to reports.

Complete the following steps to undo changes to reports:

- 1 Users can undo changes made to reports by selecting the **<Report Home>** tab followed by the **<Back>** icon.

### D6. Grantee and HUD | Changing the Report Format

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to change the report format.	
<b>Complete the following steps to change the report format:</b>	
<ol style="list-style-type: none"> <li>Users can modify the look and presentation of reports by selecting the <b>&lt;Grid&gt;</b> tab followed by clicking on the desired report format from the dropdown menu.</li> </ol>	

### D7. Grantee and HUD | Outline Function

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to change the report format.	
<b>Complete the following steps to change the report format:</b>	
<ol style="list-style-type: none"> <li>Users can choose the <b>&lt;Outline&gt;</b> icon to collapse or expand data level displays.</li> </ol>	

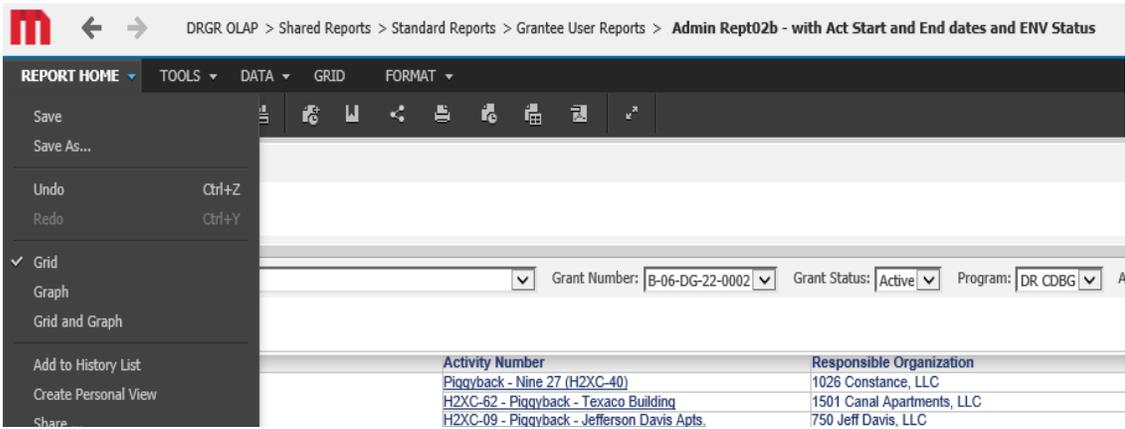


### D8. Grantee and HUD | Display Graphs

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to display graphs.	
<b>Complete the following steps to display graphs:</b>	
<p>1 Users can display report data as graphs by selecting the <b>&lt;Report Home&gt;</b> tab followed by the <b>&lt;Graph&gt;</b> icon.</p> 	
<p>2 Once the graph is displayed another row of graphing options is displayed in the “Graph” tab. Users should consider that some reports include a significant amount of data and that as the number of columns and rows increase, graphs become more complex and may not display all data labels.</p>	

### E. Saving Reports

#### E1. Grantee and HUD | Saving to My Reports

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to save reports to My Reports.	
<b>Complete the following steps to save reports to My Reports:</b>	
<p>1 After modifying a report, select the <b>&lt;Report Home&gt;</b> tab followed by <b>&lt;Save As&gt;</b>.</p> 	
<p>2 The “Save As” window will appear. Provide a “Name” and “Description” in the applicable fields. When complete, select <b>&lt;OK&gt;</b>.</p>	



<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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## E2. Grantee and HUD | Saving to the History List

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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**Purpose:** Allow Grantee and HUD Users to save reports to the History List.

Complete the following steps to save reports to the History List:

- Users can save a report to their “History List,” which serves as the user’s inbox to keep the report results for future reference. Unlike other saving methods, this option allows the user to keep the point-in-time data displayed in the report at the time it is saved. To accomplish this, select the **<Report Home>** tab followed by **<Add to History List>**.



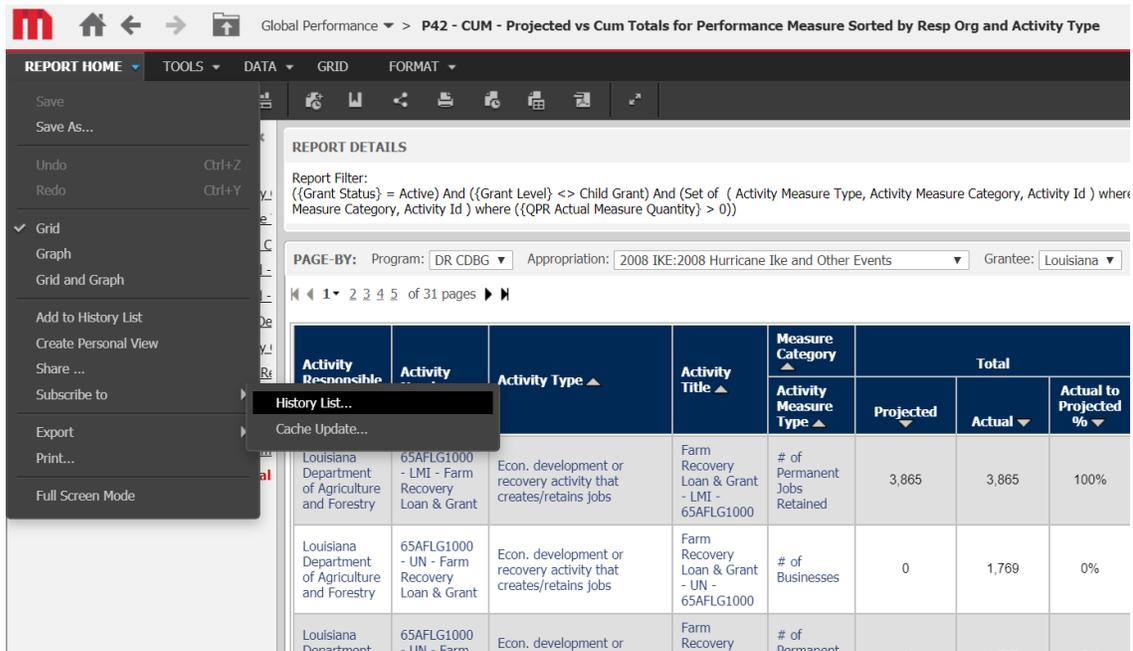
### E3. Grantee and HUD | Subscribing to Reports in the History List

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
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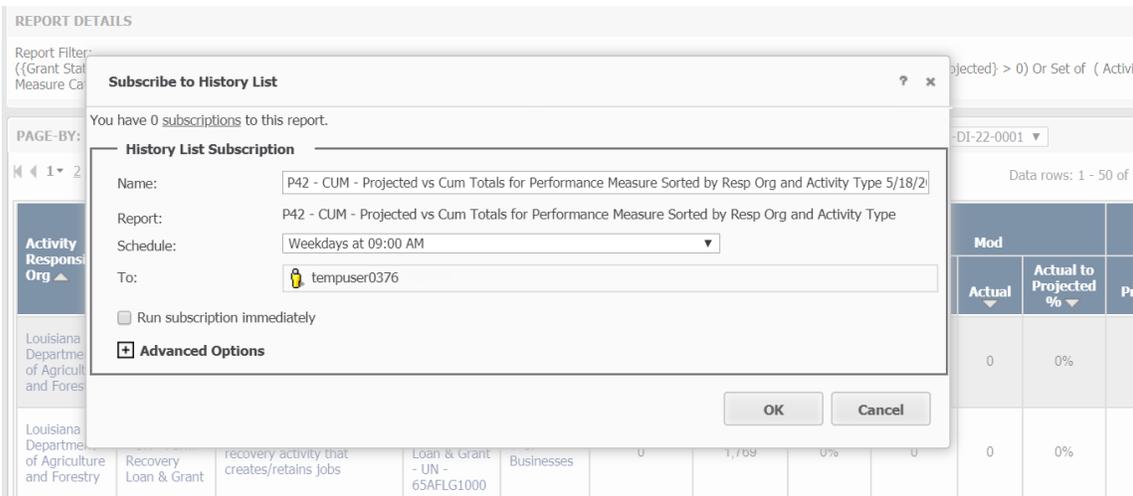
**Purpose:** Allow Grantee and HUD Users to subscribe to reports in the History List.

**Complete the following steps to subscribe to reports in the History List:**

- Users can generate reports automatically at scheduled intervals (e.g. every Monday) as opposed to logging into the DRGR System and running each report manually. To accomplish this, select the **<Report Home>** tab, then select the **<Subscribe To>** button followed by the **<History List>** option.



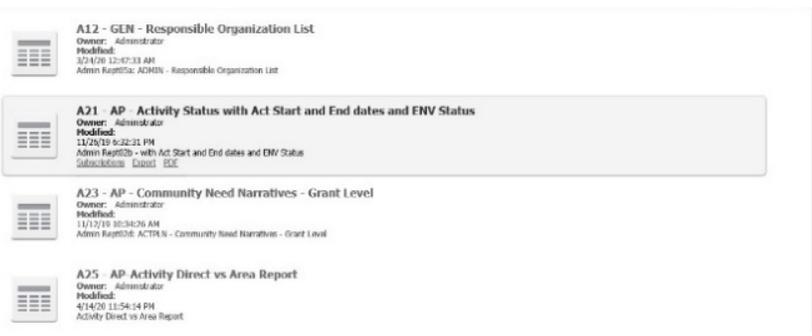
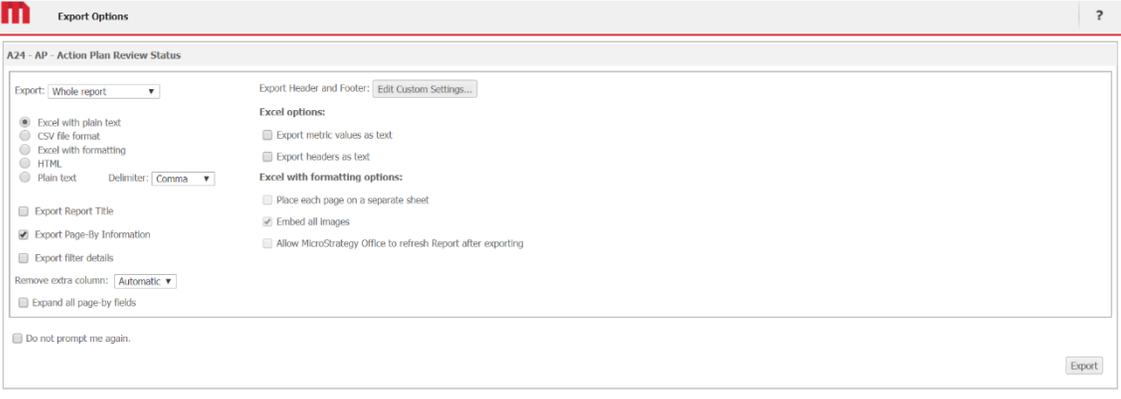
- This action generates a pop-up window that allows the User to identify the schedule for automatic report production. Once the "Schedule" field has been completed, select **<OK>**.





## F. Exporting Reports

### F1. Grantee and HUD | Export Report to Excel

<b>User Role:</b> Grantee and HUD Users	<b>Menu Option:</b> Reports
<b>Purpose:</b> Allow Grantee and HUD Users to export reports to Excel.	
<input checked="" type="checkbox"/> Complete the following steps to export reports to Excel:	
<p>1 Reports can be exported from two locations within the DRGR System. The first is from the report screen. To accomplish this, select the <b>&lt;Report Home&gt;</b> tab, followed by the <b>&lt;Export&gt;</b> button.</p>	
<p>2 The second method can be accessed before selecting the report to load. Move your cursor over the desired report and select the <b>&lt;Export&gt;</b> button that appears.</p>	
<p>3 Regardless of the method chosen, the “Export Options” page will open in a new tab. Users may specify their exporting parameters and when complete select <b>&lt;Export&gt;</b>. Depending on the internet browser, Users may be prompted to open or save the file.</p>	
<p>4 If a user selects the <b>&lt;Excel with formatting&gt;</b> export option, the Excel report will look similar to the report displayed in MicroStrategy.</p>	



User Role: Grantee and HUD Users

Menu Option: Reports

Activity Number	Activity Title	Activity Type	Activity National Objective	Activity Benefit Report Type
5186-012-01-Cartersville	5186-012-01-Cartersville	Affordable Rental Housing	Low/Mod	Direct Benefit
5186-012-Cartersville	5186-012-Cartersville	Construction of new housing	Low/Mod	Direct Benefit
5189-14A-Atlanta	5189-14A-Atlanta	Affordable Rental Housing	Low/Mod	Direct Benefit
5212-18A-Macon/Bibb	5212-18A-Macon/Bibb	Construction of new housing	Slums and Blight	Direct Benefit
5213-012-01-Darien	5213-012-01-Darien-Rental	Affordable Rental Housing	Low/Mod	Direct Benefit
5213-012-Darien	5213-012-Darien	Construction of new housing	Low/Mod	Direct Benefit
5213-03J-Darien	5213-03J-Darien	Construction/reconstruction of water/sewer	Low/Mod	Area Benefit

- If a user selects the **<Excel with plain text>** export option, the report will export with unformatted data, thereby allowing the user to more easily edit and format the data in MS Excel.

Activity Number	Activity Title	Activity Type	Activity National Objective	Activity Benefit Report Type
5186-012-01-Cartersville	5186-012-01-Cartersville	Affordable Rental Housing	Low/Mod	Direct Benefit
5186-012-Cartersville	5186-012-Cartersville	Construction of new housing	Low/Mod	Direct Benefit
5189-14A-Atlanta	5189-14A-Atlanta	Affordable Rental Housing	Low/Mod	Direct Benefit
5212-18A-Macon/Bibb	5212-18A-Macon/Bibb	Construction of new housing	Slums and Blight	Direct Benefit
5213-012-01-Darien	5213-012-01-Darien-Rental	Affordable Rental Housing	Low/Mod	Direct Benefit
5213-012-Darien	5213-012-Darien	Construction of new housing	Low/Mod	Direct Benefit
5213-03J-Darien	5213-03J-Darien	Construction/reconstruction of water/sewer lines or systems	Low/Mod	Area Benefit
5213-03K-Darien	5213-03K-Darien	Construction/reconstruction of streets	Low/Mod	Area Benefit
5214-004-Brunswick	5214-004-Brunswick	Clearance and Demolition	Slums and Blight	Area Benefit
5214-012-Brunswick	5214-012-Brunswick	Construction of new housing	Slums and Blight	Direct Benefit
5214-14A-Brunswick	5214-14A-Brunswick	Rehabilitation/reconstruction of residential structures	Slums and Blight	Direct Benefit
5333-013-Darien	5333-013-Darien	Homeownership Assistance to low- and moderate-income	Low/Mod	Direct Benefit

## F2. Grantee and HUD | Export Report to PDF

User Role: Grantee and HUD Users

Menu Option: Reports

**Purpose:** Allow Grantee and HUD Users to export reports to PDF.

Complete the following steps to export reports to PDF:

- Reports can be exported from two locations within the DRGR System. The first is from the report screen. To accomplish this, select the **<Report Home>** tab, followed by the **<PDF>** button.



User Role: Grantee and HUD Users	Menu Option:  Reports
2 The second method is via the Move your cursor over the desired report and select the <PDF> button that appears.	
3 Regardless of the method chosen, the “Export Options” page will open in a new tab. Unlike the Excel exporting options, Users cannot modify the look and feel of the report or re-sort the order of the information included in the report.	

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## Appendix A: List of DRGR OLAP Reports and Corresponding DRGR Analytics Reports

Below is a listing of legacy reports from DRGR OLAP and the corresponding reports in the new DRGR Analytics folder.

Legacy Name in DRGR OLAP	Report Name in DRGR Analytics
Admin Rept04e: HUD Field Office Manager Report	A11 - GEN - HUD Field Office Manager Report
Admin Rept05a: ADMIN - Responsible Organization List	A12 - GEN - Responsible Organization List
Admin Rept01a_ GRANT- DRGR Grant Status and CPD Contact	A13 - GEN - DRGR Grant Status and CPD Contact
Admin Rept02b - with Act Start and End dates and ENV Status	A21 - AP - Activity Status with Act Start and End dates and ENV Status
Admin Rept02c_ ACTPLN- Activity Descriptions and Locations	A22 - AP - Activity Descriptions and Locations
Admin Rept02d: ACTPLN - Community Need Narratives - Grant Level	A23 - AP - Community Need Narratives - Grant Level
Admin Rept02a: ACTPLN- Action Plan Review Status	A24 - AP - Action Plan Review Status
Activity Direct vs Area Report	A25-AP-Activity Direct vs Area Report
Admin Rept03b: QPR - Exec Summary Progress Narrative	A31 - QPR - Executive Summary Progress Narrative
Admin Rept03c: QPR Activity Progress Narratives	A32 - QPR - Activity Progress Narratives
Admin Rept03d_ ACTPLN- Activity Descriptions and Locations; Admin Rept03d: QPR - Reviewer Comments	A33 - QPR - Reviewer Comments
Admin Rept03a: QPR - Report Status	A34 - QPR - Report Submit and Review Status
Admin Rept04a: USERS - Grantee DRGR Users Account Status	A41- USERS - Grantee DRGR Users Account Status
Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status	A42 - USERS - Grantee DRGR Users with System Role and Certification Status
Admin Rept04d: USERS - HUD Field Office User Certification Status	A43 - USERS - HUD Field Office User Certification Status



Admin Rept04f: USERS - DRGR Authorized Users Access by Grant	A44 - USERS - DRGR Authorized Users Access by Grant
Admin Rept05b: ADMIN - Oversight Events - Event Level	C11 - GEN - Oversight Events - Event Level and topic level
Admin Rept06c: Flag Details (QPR Level)	C12 - GEN - Flag details (QPR Level)
Admin Rept06b: Flag Details (Grant Level)	C13 - GEN - Flag details (Grant Level)
Admin Rept06a: Flag Details (Activity)	C14 - GEN - Flag details (Activity Level)
Financial Update Dashboard	F01 - DASH - Financial Updates Dashboard
Quarterly Disbursement Analysis	F02 - DASH - Quarterly Disbursement Dashboard
Fin Rept01: SF-425 Financial Report	F04 - FORM - SF-425 Financial Report
Fin Rept05c: Receipts by Project and Activity	F11 - GEN - Program Income Receipts by Project and Activity
Fin Rept05d: Program Income Account Summary	F12 - GEN - Program Income Account Summary
Fin Rept05e: PI Receipt Report	F13 - GEN - Program Income Receipts
Fin Rept06c_ MID Threshold Report	F14 - GEN - MID Threshold Report
Fin Rept07d_ Carryout Expenditure Data by Qtr - Activity Level	F15 - GEN - Carryout Expenditure Data by Qtr - Activity Level
Fin Rept07e: Fin Carryout: Budgets and Expenditures - Activity Level	F16-GEN-Carryout: Budgets and Expenditures - Activity Level
Fin Rept05e: Revolving Loan Summary	F17-GEN-Revolving Loan Summary
Fin Rept01: ACTPLN - Grant Budgets by National Objective - Activity Level	F21 - AP - Grant Budgets by National Objective - Activity Level
Fin Rept01b: ACTPLN - DRGR Grant Activity Budgets by Project	F22 - AP -DRGR Grant Activity Budgets by Project
Fin Rept07c_ QPR - Fin Data by Activity and Quarter	F31 - QPR - Fin Data by Activity and Quarter
Fin Rept09a: QPR - Fin Data by Quarter - Grant Level	F32 - QPR - Fin Data by Activity and Quarter
Fin Rept09c: QPR- Fin Data by Quarter - Project Level	F33 - QPR - Fin Data by Quarter - Project Level



Fin Rept09d: QPR- Fin Data by Quarter - by Activity Category	F34 - QPR - Fin Data by Quarter & Activity Category
Fin Rept01c: DRAWS- Budget and Disbursements by National Objective - Grant Level	F41 - DRAWS - Budget and Disbursements by National Objective - Grant Level
Fin Rept02a: DRAWS- Voucher Status by Line Item and QPR Begin Date- Grant Funds	F42 - DRAWS - Voucher Line Items by Activity and Project Incl Status and QPR Begin Date- Grant Funds
Fin Rept02b: DRAWS - Voucher Status by Line Item - Program Income	F43 - DRAWS - Voucher Line Items by Activity and Project Incl Status - Program Income
Fin Rept03: DRAWS - Drawdown Voucher Line Item Status - Grant Funds	F44 - DRAWS - Voucher Line Items by Status - Grant Funds
Fin Rept04: DRAWS - Drawdown Voucher Line Item Status by Project - Grant Funds	F45 - DRAWS - Drawdown Voucher Line Item Status by Project - Grant Funds and Program Income
Fin Rept02e_ DRAWS - Voucher Comments	F46 - DRAWS - Voucher Comments
Fin Rept05a: CUM - Program Income - Grant Level-old	F61 - CUM - Program Income - Grant Level
Fin Rept05b: CUM - Program Income - Activity Level	F62 - CUM - Program Income - Activity Level
Fin Rept06a: CUM - Fin Data - Grant Level	F63 - CUM - Fin Data - Grant Level
Fin Rept06b: CUM - Grant Funds Fin Summ - Project Level	F64 - CUM - Grant Funds Fin Summ - Project Level
Fin Rept07a: CUM - Grant Funds Financial Summ - Activity Level by Project	F65 - CUM - Grant Financial Summary - by Project and Activity
Fin Rept07a: CUM - PL 113-2 Grant Funds Financial Summ - Activity Level by Project	F66 - CUM - PL 113-2 Grant Funds Financial Summ - Activity Level by Project
Fin Rept07b: CUM - Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj	F67 - CUM - Grant Financial Summary - by Activity, Resp Org, Act Type and Nat Obj
Fin Rept08a: CUM - Grant Funds Budget and Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj	F68 - CUM - Grant Funds Budget and Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj
Fin Rept08b: CUM - Grant Funds Financial Summ - Activity Level by Project	F69-CUM - Grant Funds Financial Summ - Activity Level by Project



Fin Rept02c_ Voucher Revision Report - Grant Funds	F71 - REV - Voucher Revision Report - Grant Funds, Reasons and Comments
N/A	P02 - DASH - General Performance Dashboard
Perf Rept02b: Actual Accomplishments by Quarter HH and HU Only	P10 - GEN - Actual Accomplishments by Quarter HH and HU Only
Perf Rept04a: ACTPLN - Beneficiary and Hsg Measure Types Selected - Activity Level	P21 - AP - Beneficiary and Hsg Measure Types Selected - Activity Level
Perf Rept04b: ACTPLN - Area Benefit Type Selected- Census vs Survey - Activity Level	P22 - AP - Area Benefit Type Selected- Census vs Survey - Activity Level
Perf Rept05: ACTPLN - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level	P23 - AP - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level
Perf Rept05a: ACTPLN - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level	P24 - AP - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level
Perf Rept09: ACTPLN - DREF Activity Budgets and Descriptions	P25 - AP - DREF Activity Budgets and Descriptions
Perf Rept02c: QPR - Actual Accomplishments by Quarter	P31 - QPR - Actual Accomplishments by Quarter
Perf Rept03: QPR - Addresses by Activity and Responsible Organization	P32 - QPR - Addresses by Activity and Responsible Organization
Perf Rept06: QPR - Direct Benefit Activities - Beneficiary Statistics by Household Type	P33- QPR - Household Characteristics for Direct Benefit Activities by Tenure and Ethnicity
Perf Rept03b – QPR Address Supporting Data	P34-QPR-Address Supporting Data
Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number	P41 - CUM - Planned and Actual Performance Measures by Activity and Income Level
Perf Rept02a: CUM - Projected vs Cum Totals for Performance Measure Sorted by Resp Org and Activity Type	P42 - CUM - Projected vs Cum Totals for Performance Measure Sorted by Resp Org and Activity Type