



Report Module

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7. Report Module

The Reports Module is considered an “optional” module because users do not need to utilize the module to carry-out their grantee responsibilities. However, the Reports Module (or “MicroStrategy”) is a vital tool available to grantees to analyze and/or troubleshoot data already entered into DRGR. Grantees are highly encouraged to utilize MicroStrategy reports to review a series of data elements including financial information, accomplishment information, and user account information.

7.1 Report Module Overview

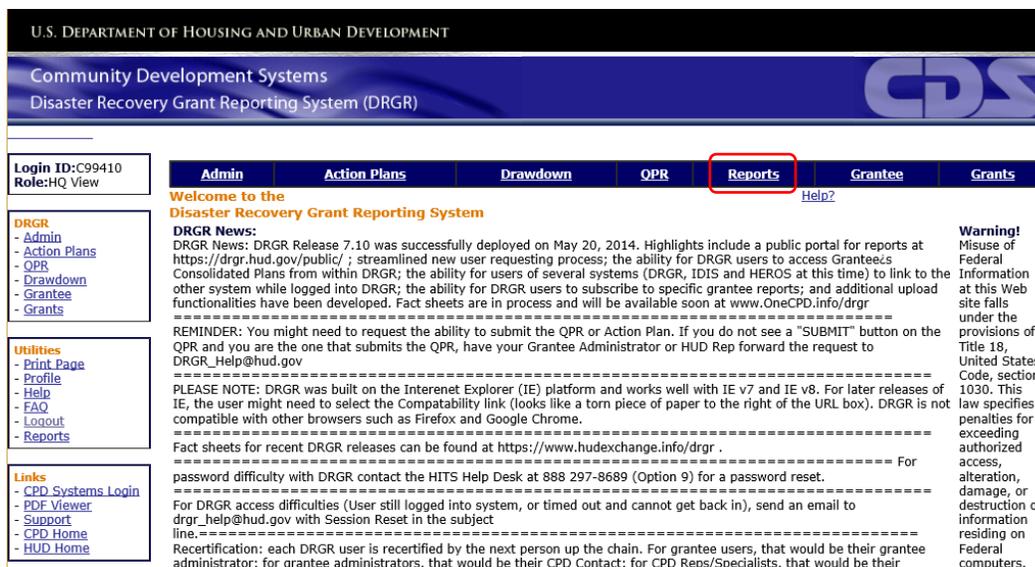
The following section explains how to access and navigate the Reports Module. In addition, the basic components of the Reports Module are described.

7.1.1 Accessing the Reports Module

You can access the Reports Module in DRGR from any computer that can run an internet browser.

1. Following login to the DRGR system (Figure 7-1), and acceptance of Disclaimer, click <Reports> link in the navigation bar.

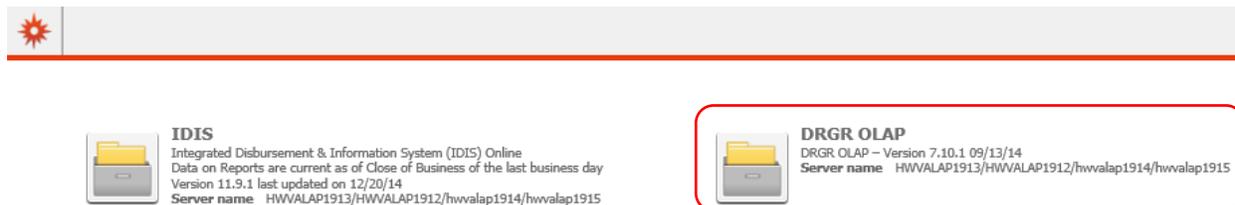
Figure 7-1: Welcome/News screen with navigation bar



Note: This opens a separate web browser window for MicroStrategy Reporting. It displays the DRGR Reports folder as well as any other Report folders you have permissions to access (e.g. IDIS).

2. When the new window opens, select the <DRGR OLAP> folder (Figure 7-2).

Figure 7-2: MicroStrategy Reporting web browser

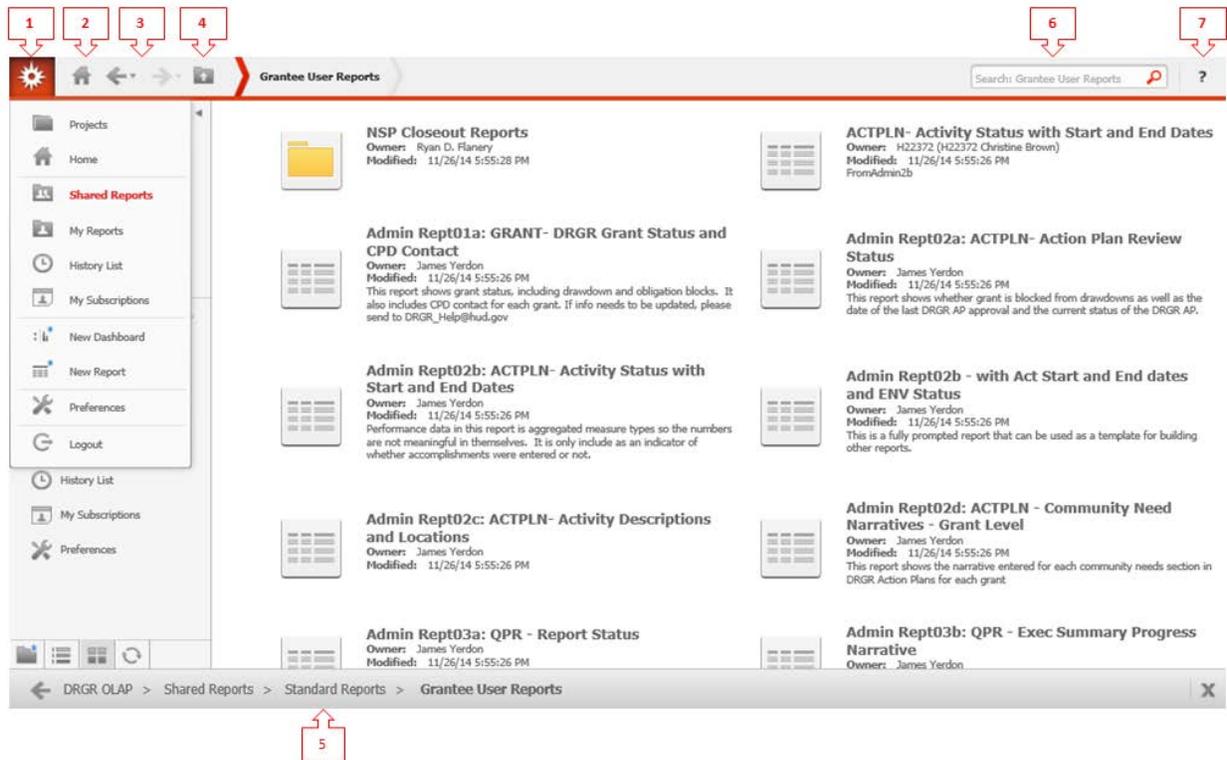


7.1.2 Navigating within MicroStrategy

MicroStrategy has its own set of navigation buttons within the user’s internet browser (Figure 7-3):

1. Allows users to navigate to different screens/folders within MicroStrategy
2. Home button takes users back to the DRGR Reports home screen
3. Back and Forward buttons allow users to navigate among screens last viewed
4. Returns users to the next highest level within the folder hierarchy
5. Allows user to see a history of the folders that were accessed to arrive at the current screen (users can also return to previous screens by clicking on the screen name)
6. Allows users to search MicroStrategy
7. Launches a menu of help topics

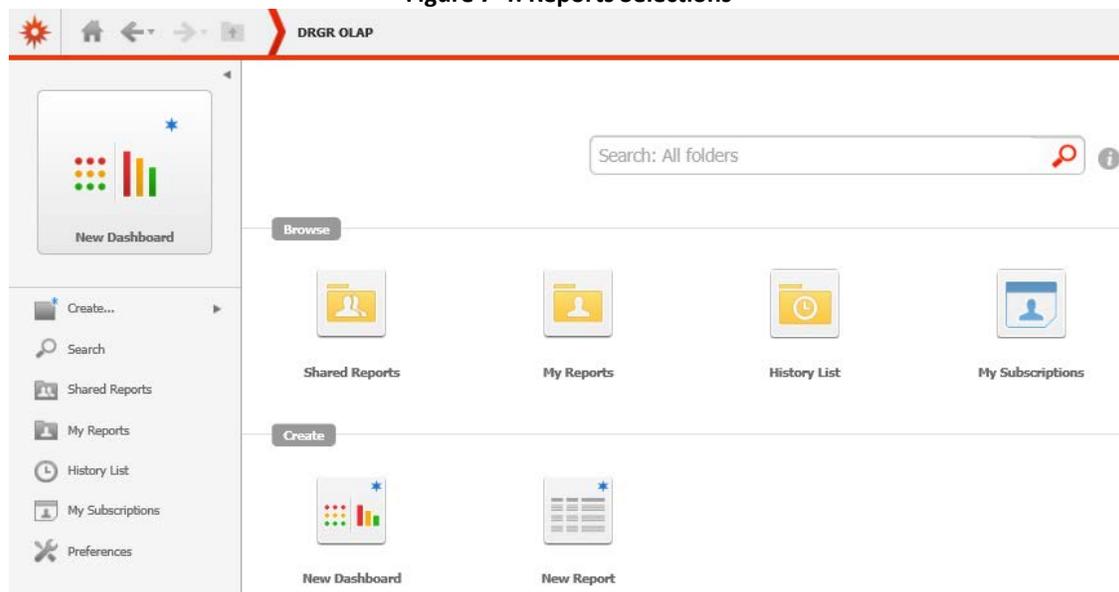
Figure 7-3: MicroStrategy Navigation Buttons



7.1.3 Navigating Across Folders

After selecting <DRGR OLAP> (Figure 7-2), a new screen loads and the user can select from the following options (Figure 7-4).

Figure 7-4: Reports Selections



7.1.3.1 Shared Reports

The “Shared Reports” folder contains the following two subfolders (Figure 7-5):

- a. **Public Reports:** This folder contains Financial and Quarterly Disbursement Dashboards for every grant in the DRGR System (not just the user’s grants), and is accessible to all DRGR users. This is different than Standard Reports, which only display information for grants for which the user has access. See Section 7.2 for further information on Public Reports.
- b. **Standard Reports:** This folder contains reports that are unique to the type of user and the user’s permissions/access (i.e. a Grantee user sees the Grantee user specific folder and its reports, while a HUD User or TA Provider will have options to other reports). This is the most common folder - reports that users wish to “Modify”, save to “My Reports”, save to the “History List” or “Subscribe To” must first be accessed from “Standard Reports”. See Section 7.3 for additional information about Standard Reports.

Figure 7-5: Shared Reports Subfolders



7.1.3.2 My Reports

The “My Reports” folder is specific to each user’s account. Users can customize and save their personal reports in “My Reports.” See Section 7.4 to learn how to modify and save reports to this folder. Reports saved to this folder will always run the most current data each time they are accessed.

7.1.3.3 History List

The “History List” folder is also specific to each user’s account. This folder serves two functions:

1. The folder archives reports the user has previously saved to the History List (see Section 7.4.6.2). Unlike “My Reports”, reports saved here will contain the historical data from the day the report was run; and



- The folder archives all reports to which the user has subscribed (see Section 7.4.6.3). The user must select the frequency for which the data in these reports is pulled (e.g. every Monday).

7.1.3.4 My Subscriptions

The “My Subscriptions” folder (Figure 7-6) allows users to manage existing report subscriptions (see Section 7.4.6.3 for more information on subscribing to reports).

Figure 7-6: History List Subscriptions in <My Subscriptions>

Subscription Name	Report/Document	Owner	Schedule	Recipient	Personalized	Action	Unsubscribe
Fin Rept01: ACTPLN - Grant Budgets by National Objective - Activity Level 2/16/15 1:41:26 PM	Fin Rept01: ACTPLN - Grant Budgets by National Objective - Activity Level	C99410 MATTHEW DO	A75 25th of the Month	C99410 MATTHEW DO			<input type="checkbox"/>

7.1.4 Folder Views

Folders and Reports can be displayed in the “List View” (Figure 7-7) or the “Large Icon View” (Figure 7-8):

Figure 7-7: View categories – List View

Name	Owner	Modified	Description	Actions
Public Reports	Administrator	11/26/14 4:21:08 PM		
Standard Reports	Administrator	11/26/14 5:53:05 PM		



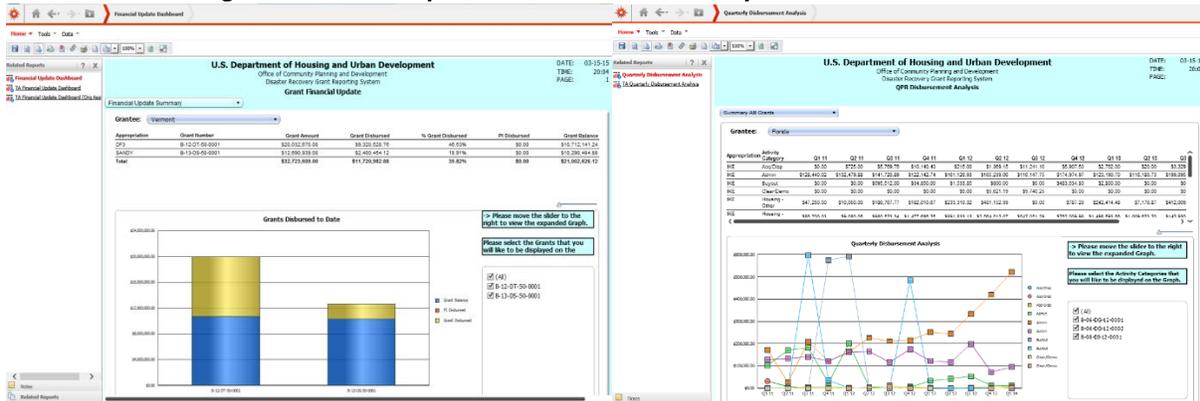
Figure 7-8: View categories –Large Icon View

7.2 Public Reports

The “Public Reports” subfolder can be accessed from “Shared Reports”. This folder contains Financial and Quarterly Disbursement Dashboards (Figure 7-9) for every grant in the DRGR System (not just the user’s grants), and is accessible to all DRGR users. This is different than Standard Reports, which only display information for grants for which the user has access.

- Financial Update Dashboard Reports** provide tables detailing the amount of funds by grant, project, or activity category that have been disbursed in DRGR. The bar charts below the tables illustrate these disbursements and the amount of funds remaining by each of these groupings. In effect, the bar charts help user see the relative amount of funding across these groupings and how much progress has been made between each individual group.
- Quarterly Expenditure Analysis Reports** display the disbursements across quarters using data from the Quarterly Progress Reports (QPRs). This allows users to examine spending trends by grants, projects, or activity categories across the life of the grants.

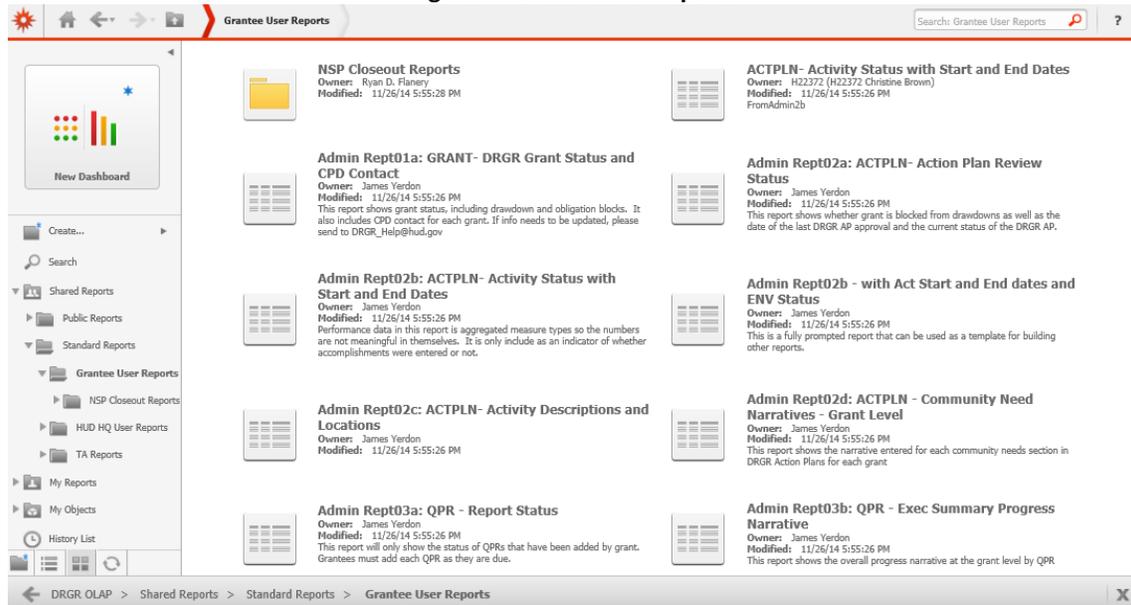
Figure 7-9: Public Reports: Financial and Quarterly Disbursement Dashboards



7.3 Standard Reports

The “Standard Reports” subfolder can be accessed from “Shared Reports”. The “Standard Reports” subfolder contains dozens of user reports pre-designed by HUD Super Users, and therefore is typically the most common folder that a user will access. In addition, every report that a user wishes to “Modify”, save to “My Reports”, save to the “History List” or “Subscribe To” must first be accessed from “Standard Reports”. Figure 7-10 shows an example screen of available Standard Reports.

Figure 7-10: Standard Reports



There are three types of Standard Reports:

- **Administration Reports:** All Administration Reports begin with “Admin” and contain useful information on: a) user account status, roles, and grant access; b) overall Grant, Action Plan, and QPR status; and c) monitoring and TA events.
- **Financial Reports:** All Financial Reports begin with “Fin” and contain useful information entered by users into the Drawdown Module including: a) overall 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.

- **Performance Reports:** All Performance Reports begin with “Perf” and contain useful information entered by users into the QPR Module including: 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.

Once a user identifies the report they would like to view from the list of “Standard Reports” (Figure 7-10), they have two options:

- By clicking on the **Report Title**, the user will be navigated to the report to view and/or edit; or
- Below the Report Title is a description of the report and three additional options to “Subscribe” to the report (see Section 7.4.6.3) or Export the Report in Excel or PDF format (see Section 7.4.5.1).

7.4 Modifying and Saving Standard Reports

As described in Section 7.3, the “Standard Reports” folder contains several pre-designed reports. By clicking on the **Report Title** (Figure 7-10), the user is navigated to the selected report within MicroStrategy to view and/or edit the report (Figure 7-11). The following section describes the various ways a user can modify and save reports.

7.4.1 Standard Report Menus and Options

Once a user has selected a Standard Report, another set of menus and options becomes available (Figure 7-11):

1. There are five “tabs” at the top of the screen: Home, Tools, Data, Grid, and Format. Each “tab” contains a drop down menu with different options based on the “tab” selected.
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 control the type of 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. See Section 7.4.2.1 for more information on the “Page-By Axis”.
4. The report column headings describe each column. In addition, MicroStrategy offers additional functions to the user by clicking on the column headings (see Section 7.4.2).
5. The Report that is displayed is contingent on the options the user has selected in items 1-4 above.



Figure 7-11: Example Standard Report (Fin Rept07b is shown)

1 Home 2 Tools 3 Data 4 Grid 5 Format

REPORT DETAILS

Report Filter: (Grant Status) = Active, Ready to Close

PAGE-BY: Grantee State: Mississippi Grantee Name: Mississippi Programs: DR CDBG Grant Number: B-06-DG-28-0002

Project ID	Project Title	Activity Number	Activity Title	Activity Type	National Objective	Metrics	Project Budget	Activity Budget		
0004	Public Housing	0004 PHP MS REG VIII - RUSHING FARMS	RUSHING FARMS	Construction of new replacement housing	Low/Mod		\$142,723.20	\$64,421.20		
		0004 PHP UNOBLIGATED	PHP UNOBLIGATED	Rehabilitation/reconstruction of residential structures	Urgent Need		\$142,723.20	\$48,302.00		
		0001 NHP REHAB AND REPAIR	NHP REHAB AND REPAIR	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$50,821,476.82		
		0001 LTWH R1161091.TW - PINNACLE AT MARINER	PINNACLE AT MARINER'S VILLAGE	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$7,020,000.00		
0001	Homeowner Programs	0001 LTWH R1161401.TW - SOUTH MS HOUSING & DEV CORP	SOUTH MS HOUSING & DEV CORP	Acquisition of property for replacement housing	Low/Mod		\$144,185,566.88	\$3,000,000.00		
		0001 NHP R1161781.TW NHP LM - MEMA	NHP - MISSISSIPPI COTTAGE PLACEMENT & ELEVATION	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$2,111,326.19		
		0001 NHP R1161781.TW NHP UN - MEMA	NHP - MISSISSIPPI COTTAGE PLACEMENT & ELEVATION	Rehabilitation/reconstruction of residential structures	Urgent Need		\$144,185,566.88	\$127,808.00		
		0001 LTWH R1161961.TW MS CHILDREN'S HOME	MS CHILDREN'S HOME SOCIETY	Construction of new housing	Low/Mod		\$144,185,566.88	\$3,350,000.00		
		0001 LTWH R1161841.TW BILOXI HOUSING AUTHORITY - SEASHORE OAKS	BILOXI HOUSING AUTHORITY - SEASHORE OAKS	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$21,500,000.00		
		0001 LTWH R11601961.TW LAMEY BRIDGE SR DEV	LAMEY BRIDGE SENIOR DEVELOPMENT, LLC	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$10,571,016.35		
		0001 NHP PROGRAM DELIVERY COST	NHP PROGRAM DELIVERY COST	Rehabilitation/reconstruction of residential structures	Urgent Need		\$144,185,566.88	\$45,684,141.52		
		0001 LTWH PLANNED ACTIVITIES	LTWH PLANNED ACTIVITIES	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$0.00		
		0002	Housing for Renters	0002 SRAP	SRAP	Affordable Rental Housing	Low/Mod		\$206,790,012.00	\$188,545,354.50
				0002 SRAP ADMIN	SRAP ADMIN	Administration	N/A		\$206,790,012.00	\$17,244,657.50
0021 GCRIP R11510013 - INFRASTRUCTURE LOWMOD	INFRASTRUCTURE LOWMOD			Construction/reconstruction of water/sewer lines or systems	Low/Mod		\$65,000,000.00	\$0.00		

7.4.2 Moving and Sorting Columns

7.4.2.1 Procedure: Cataloging Data at the Report Level (Page-by Axis)

If the report shows information in the “Page By Axis” section at the top of the report, this limits the data to the selected record. This function allows users to create and export reports with a smaller, select group of data, rather than all the data available in DRGR. Users can add any column heading to the “Page By Axis” and even move these groups to the left or the right of each other (Figure 7-12).

This action can be accomplished in two ways:

1. The first option is completed 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.
2. The second options involves using the right mouse button over the column. Place the cursor over the column header and use the right mouse button to open the menu to select <Move> and then <To Page By Axis> (Figure 7-13).

Figure 7-12: “Page By” Feature of Standard Reports

Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home Tools Data Grid Format

PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1



Figure 7-13: “Move” and “To Page by Axis” features

Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home ▾ Tools ▾ Data ▾ Grid Format ▾

PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1

Activity Number	Activity Title	Responsible Organization	Measure Type	Measure Category
NSP08_01	Homebuyer Ass	Adams County Community Development	# of Households	
NSP08_02	Acquisition & Resale	Adams County Community Development	# Owner Households	
NSP08_03	Acquisition & Resale	Adams County Community Development	# of Households	
NSP08_04	Land Banking	Adams County Community Development	# of Housing Units	
NSP08_05	Demolition	Adams County Community Development	# of Singlefamily Units	
NSP08_06	Redevelopment	Adams County Community Development	# Owner Households	

In Figure 7-13, the report is currently showing information for all Adams County, Colorado Activities. Regardless of what method is selected, once the “Activity Title” column is moved to the “Page-by Axis”, the report is filtered to only show one Activity at a time (Figure 7-14). Now, the user can select which Activity Title they would like to view from the new dropdown menu (Figure 7-15).

Figure 7-14: Report with “Activity Title” column moved to become a “Page-By” drop-down menu

Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home ▾ Tools ▾ Data ▾ Grid Format ▾

REPORT DETAILS

Report Filter:
 ((Grant Status) = Active) And (((Activity Measure Projected Quantity at Activity Number, Measure Type, Measure Category Level) > 0) Or ((QPR Measure Actual Quantity) > 0))

PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1 Activity Title: Acquisition & Resale

Activity Number	Activity Type	Responsible Organization	Measure Type	Measure Category	Low		Mod		Total		
					Metrics Projected	Actual	Projected	Actual	Projected	Actual	
NSP08_02	Acquisition - general	Adams County Community Development	# of Households		0	0	0	0	0	15	14
			# of Housing Units		0	0	0	0	0	15	14
			# of Singlefamily Units		0	0	0	0	0	15	14
			# Owner Households		0	0	0	0	0	15	14



Figure 7-15: “Page-By” drop-down menu

Activity Number	Activity Type	Responsible Organization	Measure Type	Measure Category	Low		Mod		Total	
					Projected	Actual	Projected	Actual	Projected	Actual
NSP08.02	Acquisition - general	Adams County Community Development	# of Households		0	0	0	0	15	14
			# of Housing Units		0	0	0	0	15	14
			# of Singlefamily Units		0	0	0	0	15	14
			# Owner Households		0	0	0	0	15	14

The “Page-By” feature can be turned on and off using the Tools menu (Figure 7-16):

Figure 7-16: Tools drop-down menu (“Page-by Axis” selected)

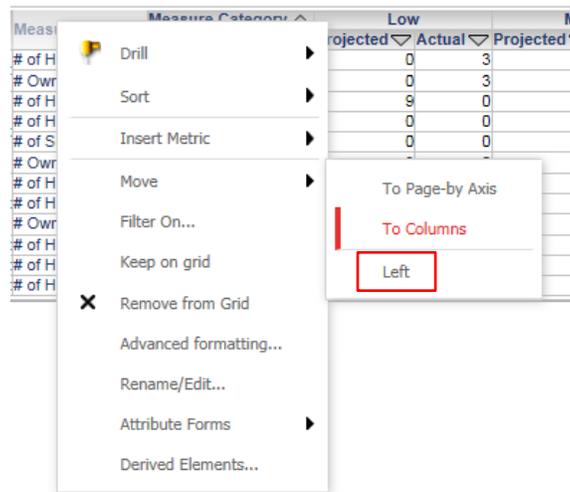
Activity Type	Responsible Organization	Measure Type
Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households
		# Owner Households
Acquisition - general	Adams County Community Development	# of Households
		# of Housing Units
Acquisition - general	Adams County Community Development	# of Singlefamily Units
		# Owner Households
Land Banking - Acquisition (NSP Only)	Adams County Community Development	# of Housing Units
		# Owner Households
Demolition and Demolition	Adams County Community Development	# of Housing Units
		# of Housing Units
Construction of new housing	Adams County Community Development	# of Housing Units
		# of Housing Units

7.4.2.2 Procedure: Changing Column Order

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.

Users can change the sort order using a couple of methods. The first method would be to place the mouse cursor over the column header (shown in grey in Figure 7-17) and using the left mouse button to drag the column to the left or right within the report. The other method is to put the cursor over the column header, but to use the right mouse button. This displays a drop down that includes the “Move” option; users can select left or right option. Attribute data cannot be moved to the right of metric data and vice versa (Figure 7-17).

Figure 7-17: “Move” column order

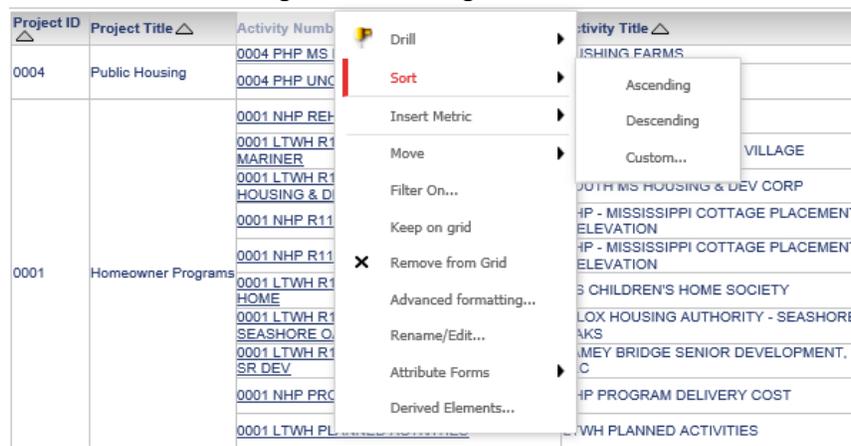


7.4.2.3 Procedure: Changing the Row Sort Order

Users can also sort using two different methods:

1. If a user only wants to change the order of one column, use the right mouse button over the column header to access a menu of options. Select <Sort> and then one of the options (“Ascending, “Descending” or “Custom”) to alter the sorting order for that column (Figure 7-18).

Figure 7-18: Sorting one Column



If a user would like to specify the sort order based on more columns, there are other options using the “Data” tab (located below the report title) and selection of <Sort>. Users choose a column name (Figure 7-19) to specify the sort order for up to three columns.



Figure 7-19: Sorting multiple Columns

Note: 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.

7.4.2.4 Procedure: Inverting Rows and Columns

Users can also invert rows and columns to assist in their data analyses:

1. To move Rows to Columns: Right click on the column header and click <Move> and then <To Columns>
2. To move Columns or Rows: Click and drag a column header – a yellow vertical line will appear indicating placement of the column

The example in Figure 7-20 shows Fin Rept01b. The report defaults to a list of Project and Activity budget information.

Figure 7-20: Default Fin Rept01b before Column Inverted

Project ID	Project Title	Activity Number	Activity Title	Activity Type	National Objective	Metrics	Project Budget	Activity Budget
0004	Public Housing	0004 PHP MS REG VIII - RUSHING FARMS	RUSHING FARMS	Construction of new replacement housing	Low/Mod		\$142,723.20	\$94,421.20
		0004 PHP UNOBLIGATED	PHP UNOBLIGATED	Rehabilitation/reconstruction of residential structures	Urgent Need		\$142,723.20	\$48,302.00
0001	Homeowner Programs	0001 NHP REHAB AND REPAIR	NHP REHAB AND REPAIR	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$50,821,476.82
		0001 LTWH R116109LTW - PINNACLE AT MARINER	PINNACLE AT MARINER'S VILLAGE	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$7,020,000.00
		0001 LTWH R116140LTW - SOUTH MS HOUSING & DEV CORP	SOUTH MS HOUSING & DEV CORP	Acquisition of property for replacement housing	Low/Mod		\$144,185,566.88	\$3,000,000.00
		0001 NHP R116176LTWNHP LM - MEMA	NHP - MISSISSIPPI COTTAGE PLACEMENT & ELEVATION	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$2,111,326.19
		0001 NHP R116176LTWNHP UN - MEMA	NHP - MISSISSIPPI COTTAGE PLACEMENT & ELEVATION	Rehabilitation/reconstruction of residential structures	Urgent Need		\$144,185,566.88	\$127,606.00
		0001 LTWH R116196LTW MS CHILDREN'S HOME	MS CHILDREN'S HOME SOCIETY	Construction of new housing	Low/Mod		\$144,185,566.88	\$3,350,000.00
		0001 LTWH R116194SLTW BILOXI HOUSING SEASHORE OAKS	BILOXI HOUSING AUTHORITY - SEASHORE OAKS	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$21,500,000.00
		0001 LTWH R1160195SLTW LAMEY BRIDGE SR DEV	LAMEY BRIDGE SENIOR DEVELOPMENT, LLC	Affordable Rental Housing	Low/Mod		\$144,185,566.88	\$10,571,016.35
		0001 NHP PROGRAM DELIVERY COST	NHP PROGRAM DELIVERY COST	Rehabilitation/reconstruction of residential structures	Urgent Need		\$144,185,566.88	\$45,684,141.52
		0001 LTWH PLANNED ACTIVITIES	LTWH PLANNED ACTIVITIES	Rehabilitation/reconstruction of residential structures	Low/Mod		\$144,185,566.88	\$0.00
0002	Housing for Renters	0002 SRAP	SRAP	Affordable Rental Housing	Low/Mod		\$205,790,012.00	\$188,545,354.50
		0002 SRAP ADMIN	SRAP ADMIN	Administration	N/A		\$205,790,012.00	\$17,244,657.50
		0021 GCRIP R1510013 - INFRASTRUCTURE LOW/MOD	INFRASTRUCTURE LOW/MOD	Construction/reconstruction of water/sewer lines or systems	Low/Mod		\$55,000,000.00	\$0.00
		0021 GCRIP R1510013 - HANCOCK S3	HANCOCK S3	Construction/reconstruction of water/sewer lines or systems	Low/Mod		\$55,000,000.00	\$6,202,220.68
		0021 GCRIP R1510013 - HANCOCK S4	HANCOCK S4	Construction/reconstruction of water/sewer lines or systems	Low/Mod		\$55,000,000.00	\$15,806,674.27



If a user left-clicks and drags the “National Objective” Column and places it before the first column of the report, the report will group the Project and Activity information by National Objective (Figure 7-21). Now the user can easily identify Project and Activity financial information by National Objective.

Figure 7-21: Fin Rept01b after “National Objective” Column Inverted

Home ▾ Tools ▾ Data ▾ Grid Format ▾ Last update: 3/15/15 9:19:51 PM



National Objective	Project ID	Project Title	Activity Number	Activity Title	Activity Type	Metrics	Project Budget	Activity Budget
LowMod	0001	Homeowner Programs	0004 PHP MS REG VIII - RUSHING FARMS	RUSHING FARMS	Construction of new replacement housing		\$142,723.20	\$94,421.20
			0001 NHP REHAB AND REPAIR	NHP REHAB AND REPAIR	Rehabilitation/reconstruction of residential structures		\$144,185,566.88	\$50,821,476.82
			0001 LTWH R116109LTW - PINNACLE AT MARINER	PINNACLE AT MARINER'S VILLAGE	Affordable Rental Housing		\$144,185,566.88	\$7,020,000.00
			0001 LTWH R116140LTW - SOUTH MS HOUSING & DEV CORP	SOUTH MS HOUSING & DEV CORP	Acquisition of property for replacement housing		\$144,185,566.88	\$3,000,000.00
			0001 NHP R116178LTWNHP LM - MEMA	NHP - MISSISSIPPI COTTAGE PLACEMENT & ELEVATION	Rehabilitation/reconstruction of residential structures		\$144,185,566.88	\$2,111,326.19
			0001 LTWH R116196LTW MS CHILDREN'S HOME	MS CHILDREN'S HOME SOCIETY	Construction of new housing		\$144,185,566.88	\$3,350,000.00
			0001 LTWH R116194SLTW BILOXI HOUSING SEASHORE OAKS	BILOXI HOUSING AUTHORITY - SEASHORE OAKS	Affordable Rental Housing		\$144,185,566.88	\$21,500,000.00
			0001 LTWH R116D195SLTW LAMEY BRIDGE SR DEV	LAMEY BRIDGE SENIOR DEVELOPMENT, LLC	Affordable Rental Housing		\$144,185,566.88	\$10,571,016.35
			0001 LTWH PLANNED ACTIVITIES	LTWH PLANNED ACTIVITIES	Rehabilitation/reconstruction of residential structures		\$144,185,566.88	\$0.00
			LowMod	0002	Housing for Renters	0002 SRAP	SRAP	Affordable Rental Housing
0021 GCRIP R1510013 - INFRASTRUCTURE LOW/MOD	INFRASTRUCTURE LOW/MOD	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$0.00
0021 GCRIP R1510013 - HANCOCK S3	HANCOCK S3	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$6,202,220.68
0021 GCRIP R1510013 - HANCOCK S4	HANCOCK S4	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$15,806,674.27
0021 GCRIP R1510013 - HANCOCK W8	HANCOCK W8	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$8,664,102.38
0021 GCRIP R1510013 - HANCOCK W3	HANCOCK W3	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$4,135,235.07
0021 GCRIP R1510013 - HANCOCK W4	HANCOCK W4	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$8,445,585.06
0021 GCRIP R1510013 - STONE S8	STONE S8	Construction/reconstruction of water/sewer lines or systems					\$55,000,000.00	\$11,746,182.54

7.4.3 Undoing Changes

Users can “undo” and “redo” and changes they made using the toolbar at the top of MicroStrategy (Figure 7-22):

Figure 7-22: Undo or Redo Tool



7.4.4 Accessing Other Report Format Options

7.4.4.1 Procedure: Presentation Format

Users can modify the look and presentation of reports by clicking the <Grid> tab and using the drop-down menu of presentation formatting options (Figure 7-23).



Figure 7-23: Presentation Format drop-down menu

Activity Number ▲	Activity Title ▲	Activity Type ▲	Responsible Organization ▲	Measure Type ▲	Measure Category ▲	Low		Mod		Total	
						Projected	Actual	Projected	Actual	Projected	Actual
NSP08.01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households		0	3	4	1	4	4
				# Owner Households		0	3	4	1	4	4
NSP08.02	Acquisition & Resale	Acquisition - general	Adams County Community Development	# of Households		9	0	6	9	15	14
				# of Housing Units		0	0	0	0	15	14
				# of Singlefamily Units		0	0	0	0	15	14
				# Owner Households		9	0	6	9	15	14
NSP08.03	Acquisition & Resale 25% AMI	Acquisition - general	Adams County Community Development	# of Households		9	9	0	0	9	9
				# of Housing Units		0	0	0	0	9	9
				# Owner Households		9	9	0	0	9	9
NSP08.04	Land Banking	Land Banking - Acquisition (NSP Only)	Adams County Community Development	# of Housing Units		0	0	0	0	2	0

7.4.4.2 Procedure: Outline Function

Users can also choose the “Outline” icon to collapse/expand data level displays (Figure 7-24):

Figure 7-24: The “Outline” icon

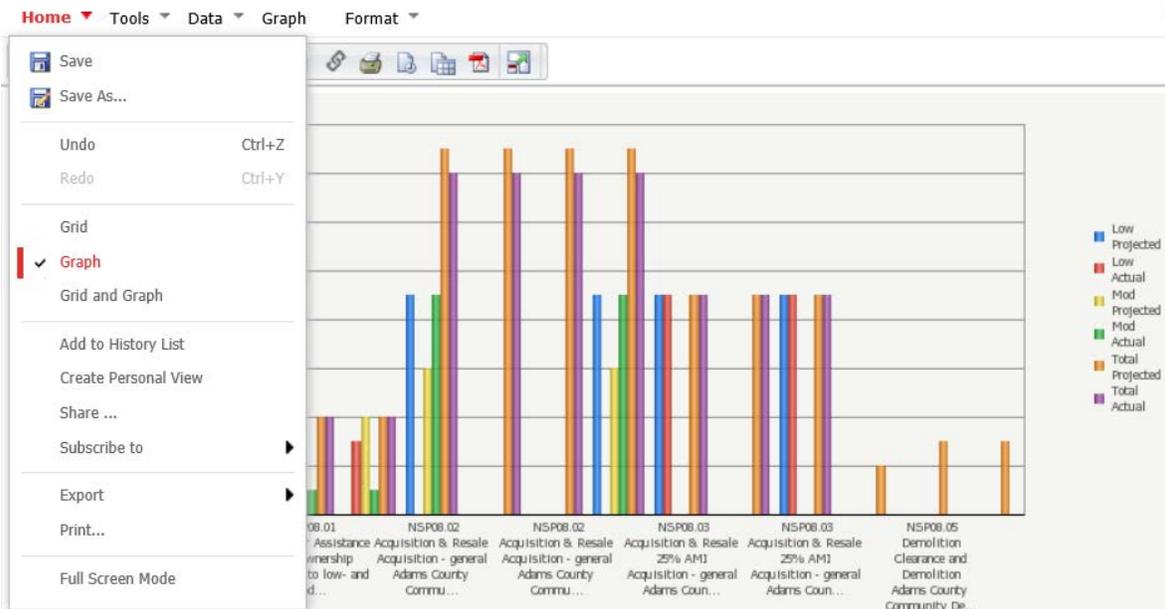
Activity Number ▲	Activity Title ▲	Activity Type ▲	Responsible Organization ▲	Measure Type ▲	Measure Category ▲	Low		Mod		Total	
						Projected	Actual	Projected	Actual	Projected	Actual
NSP08.01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households		0	3	4	1	4	4
				# Owner Households		0	3	4	1	4	4
NSP08.02	Acquisition & Resale	Acquisition - general	Adams County Community Development	# of Households		9	0	6	9	15	14

7.4.4.3 Procedure: Display Graphs

Users can display report data as graphs using the “Graph” icon (Figure 7-25) or by selecting the <Home> tab and then <Graph> (Figure 7-26). Users can also select the <Grid and Graph> option via the icon or “Home” tab to display both the graph and report data simultaneously.

Figure 7-25: “Graph” and “Graph and Grid” Icons

Figure 7-26: <Home> drop-down menu with “Graph” Selected



Once the graph is displayed, another row of graphing options displays (Figure 7-27). Users should consider that some reports include a significant amount of data and that as the number of columns and rows of data increase, graphs become more complex and may not be able to display all data labels.

Figure 7-27: Graphing tools and options



7.4.5 Exporting Reports

Reports can be exported in PDF and Excel formats. Reports can be exported from two different locations within DRGR:

1. Unmodified reports can be exported from the main report list (Shared Reports > Standard Reports), see Figure 7-28; or
2. Modified or unmodified reports can be exported from the view/edit report screen (once a report is selected) using the “Export” icons, see Figure 7-29.

Figure 7-28: Export a Report from the Main Report List

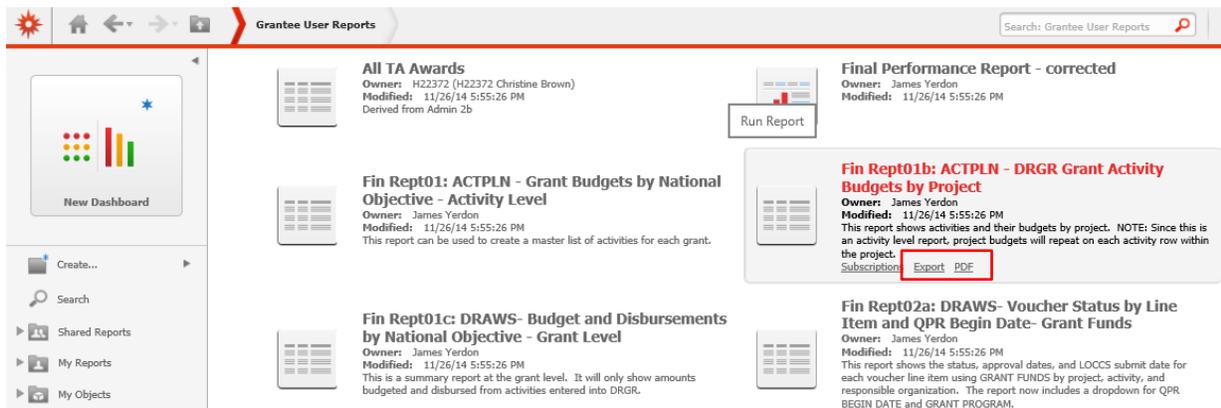


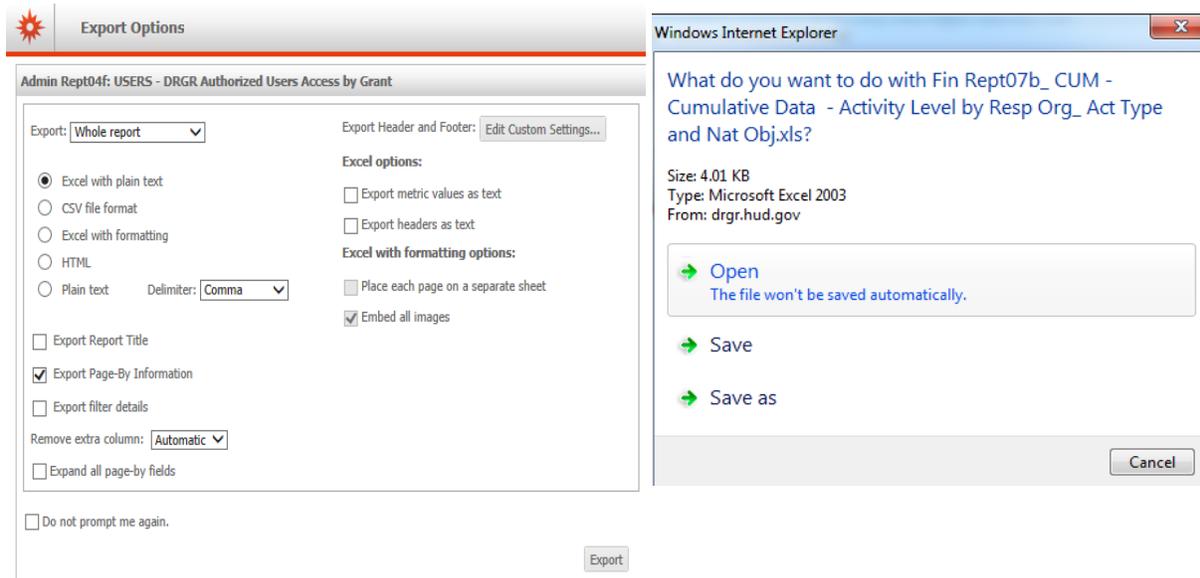
Figure 7-29: Export a Report from the View/Edit Report Screen



7.4.5.1 Procedure: Export Report to Excel

If a user selects to export a report to MS Excel, the system prompts the user to select from a menu of exporting options (Figure 7-30). Once the user has made their selections, depending on their internet browser, the user may be prompted to open or save the file.

Figure 7-30: Excel Report Options



If a user selects the <Excel with formatting> exporting option, the Excel report will look similar to the report displayed in MicroStrategy (Figure 7-31). If a user selects the <Excel with plain text> exporting option, the report will export with unformatted data, thereby allowing the user to more easily edit and format the data in MS Excel (Figure 7-32).

Figure 7-31: Export to Excel with Formatting Report

Activity Number	Activity Title	Activity Type	National Objective	Responsible Org	Total Budget (PF & PI)	Total Obligation (PF & PI)	Grant Fund Disbursed (PF)	QPR Activity Program Income Received	Program Income Disbursed	Total Expended (PF & PI)
NSP08-07A	ACCD Administration	Administration	N/A	Adams County Community Development	\$275,000.00	\$275,000.00	\$77,895.08	\$234,600.73	\$109,680.15	\$185,618.31
NSP08.01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	NSP Only - LMMI	Adams County Community Development	\$40,000.00	\$40,000.00	\$40,000.00	\$0.00	\$0.00	\$40,000.00
NSP08.02	Acquisition & Resale	Acquisition - general	NSP Only - LMMI	Adams County Community Development	\$4,156,765.00	\$4,156,765.00	\$2,424,588.35	\$1,879,039.35	\$1,339,226.70	\$3,763,815.05
NSP08.03	Acquisition & Resale 25% AMI	Acquisition - general	NSP Only - LH - 25% Set-Aside	Adams County Community Development	\$1,878,000.00	\$1,878,000.00	\$854,476.75	\$798,094.84	\$993,986.21	\$1,848,462.96
NSP08.04	Land Banking	Land Banking - Acquisition (NSP Only)	NSP Only - LMMI	Adams County Community Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NSP08.05	Demolition	Clearance and Demolition	NSP Only - LMMI	Adams County Community Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NSP08.06	Redevelopment	Construction of new housing	NSP Only - LH - 25% Set-Aside	Adams County Community Development	\$146,027.00	\$146,027.00	\$146,027.00	\$0.00	\$0.00	\$146,027.00
NSP08.07	ACHA Administration	Administration	N/A	Adams County Community Development	\$510,000.00	\$510,000.00	\$266,763.34	\$0.00	\$148,475.09	\$415,238.43
Total					\$7,005,792.00	\$7,005,792.00	\$3,809,760.52	\$2,911,734.92	\$2,591,368.15	\$6,399,161.75



Figure 7-32: Export to Excel without Formatting Report

Activity Numb	Activity Title	Activity Type	National Objective	Responsible Org	Total Budget (PF & Total Obligation)	Grant Fund Dist	QPR Activity Pro	Program Income C	T
NSP08-07A	ACCD Administration	Administration	N/A	Adams County Commu	\$275,000.00	\$275,000.00	\$77,895.08	\$234,600.73	\$109,680.15
NSP08.01	Homebuyer Assistance	Homeownership Assistance to Ic	NSP Only - LMMI	Adams County Commu	\$40,000.00	\$40,000.00	\$40,000.00	\$0.00	\$0.00
NSP08.02	Acquisition & Resale	Acquisition - general	NSP Only - LMMI	Adams County Commu	\$4,156,765.00	\$4,156,765.00	\$2,424,588.35	\$1,879,039.35	\$1,339,226.70
NSP08.03	Acquisition & Resale 25% A	Acquisition - general	NSP Only - LH - 25% Set-A	Adams County Commu	\$1,878,000.00	\$1,878,000.00	\$854,476.75	\$798,094.84	\$993,986.21
NSP08.04	Land Banking	Land Banking - Acquisition (NSP	NSP Only - LMMI	Adams County Commu	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NSP08.05	Demolition	Clearance and Demolition	NSP Only - LMMI	Adams County Commu	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NSP08.06	Redevelopment	Construction of new housing	NSP Only - LH - 25% Set-A	Adams County Commu	\$146,027.00	\$146,027.00	\$146,027.00	\$0.00	\$0.00
NSP08.07	ACHA Administration	Administration	N/A	Adams County Commu	\$510,000.00	\$510,000.00	\$266,763.34	\$0.00	\$148,475.09
17 Total					\$7,005,792.00	\$7,005,792.00	\$3,809,750.52	\$2,911,734.92	\$2,591,368.15

7.4.5.2 Procedure: Export Report to PDF

If a user selects to export a report to PDF, the system prompts the user to select from a menu of exporting options relating to basic presentation of the PDF document (Figure 7-33). However, unlike the Excel exporting options, the user cannot modify the look and feel of the report or re-sort the order of the information included in the report. Therefore, the user must design the report in MicroStrategy before exporting to PDF.

Figure 7-33: PDF Report Options

Fin Rept01b: ACTPLN - DRGR Grant Activity Budgets by Project

Export:

Page Header and Footer:

Scaling:

- Adjust font to % of original size
- Fit to: page(s) wide by tall

Orientation:

- Portrait
- Landscape

Expand all page-by fields

Report Header:

- Print cover page
 - With Filter Details
 - With Report Details
- Cover page location:
 - Before report
 - After report

Do not prompt me again.

7.4.6 Saving and Subscribing to Reports

7.4.6.1 Procedure: Saving Modified Versions of Reports

The “Save” report feature allows users to customize and save the format of reports for use in the future. Any changes made to a report format (see Section Modifying and Saving Standard Reports 7.4) can be saved and accessed in the “My Reports” folder. From the “My Reports” folder, the user can run their user-formatted report with current data as opposed to selecting the default report found in “Standard Reports”.

1. To save a report from the view/edit report screen, click the <Save> icon (Figure 7-34).



Figure 7-34: Saving Changes to Report Format with <Save> icon

The screenshot shows the top navigation bar with 'Home', 'Tools', 'Data', 'Grid', and 'Format' menus. A red box highlights the 'Save' icon in the toolbar. Below the toolbar is the 'REPORT DETAILS' section with a filter '(Grant Status) = Active, Ready to Close'. The main area contains a table with columns: Project ID, Project Title, Activity Number, Activity Title, Activity Type, and Metrics. The table lists various housing and infrastructure projects with their respective activity numbers and titles.

2. Save the report in “My Reports” by selecting <My Reports> from the “Save As:” drop-down menu and entering a file name.
3. Click <OK> to save the report for future access.
4. The user is able to navigate to the saved report at any time by selecting the “My Reports” folder, see Figure 7-4.

7.4.6.2 Procedure: Saving 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 result 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.

1. To save a report to the “History List”: Click the <Home> tab and select <Add to History List> from the menu (Figure 7-35).

Figure 7-35: <Home> Drop-down Menu Option: “Add to History List”

The screenshot shows the 'Home' drop-down menu open, with 'Add to History List' highlighted in red. The background shows a table with columns: Award Number, Workplan Number, Workplan Status, Budget, Obligated Amount, Drawn Funds, and Draw Funds Pending. The table contains multiple rows of award and workplan data.



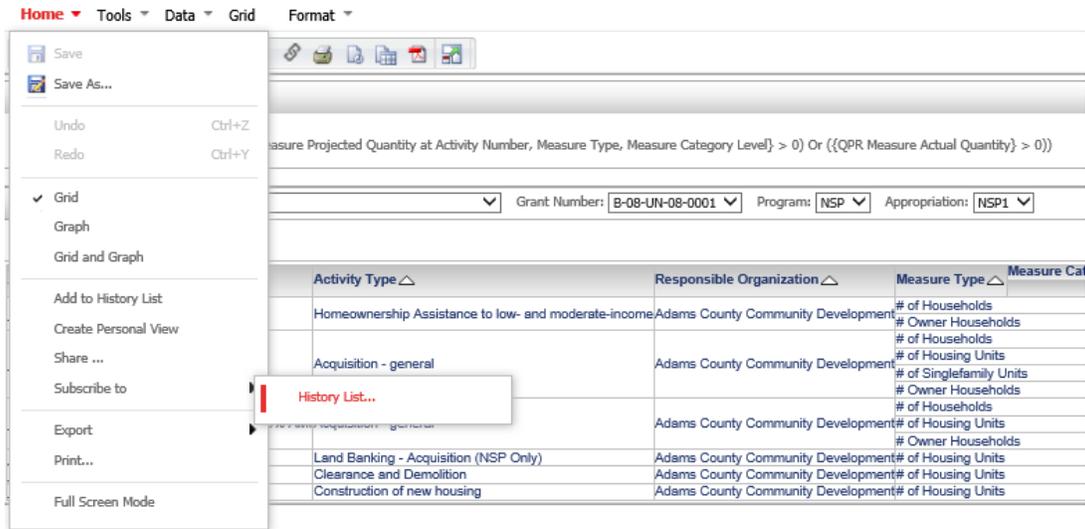
- The user is able to navigate to the saved report at any time by selecting the “History List” folder, see Figure 7-4.

7.4.6.3 Procedure: Subscribing to Reports in the History List

Users can generate reports automatically at scheduled intervals (e.g. every Monday) as opposed to logging into DRGR and running all of the reports manually. To subscribe to a report:

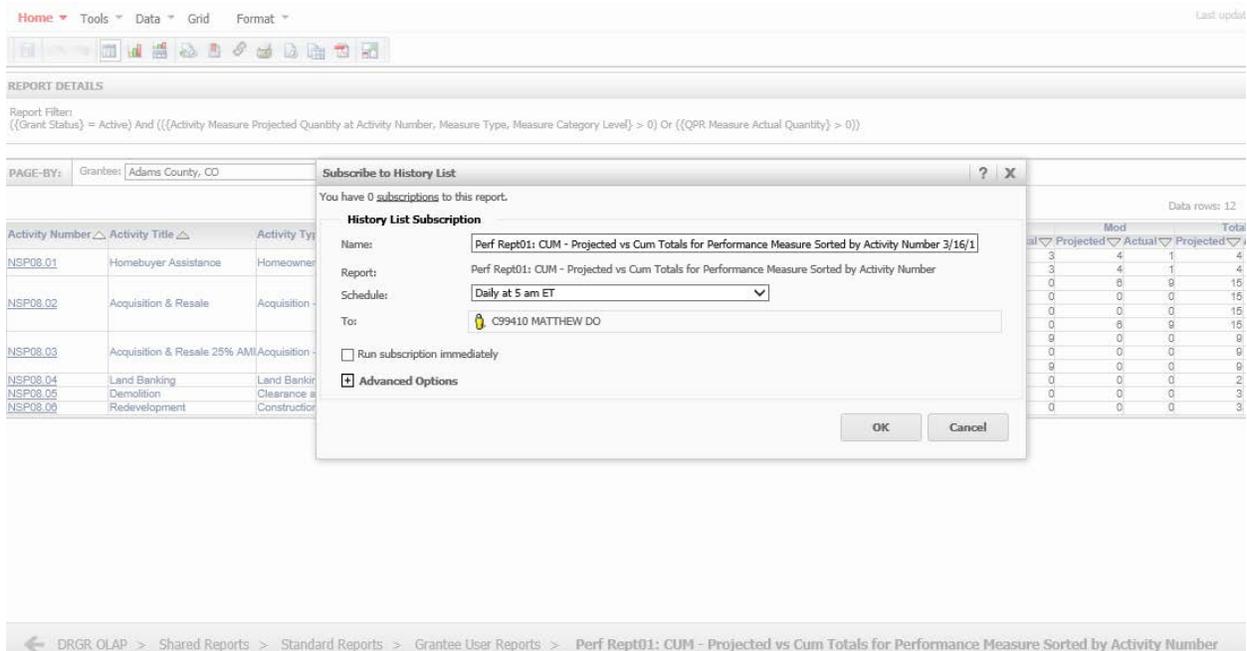
- Click the <Home> tab and select the <Subscribe To> and then the <History List> option (Figure 7-36).

Figure 7-36: Accessing “Subscribe to History List”



- This action generates a pop-up window that allows the user to identify the schedule for automatic report production (Figure 7-37).

Figure 7-37: Subscribing to a Report for Automatic Generation





3. The user is able to navigate and view or edit the subscription at any time by selecting the “My Subscriptions” folder, see Figure 7-4.