

### 3 Release Summary

#### 3.1 Release 11.19

- New Reports:
  - [PR07](#) - HOPWA Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
  - [PR05](#) - HOPWA Drawdown Report by Project and Activity
  - [PR02](#) - Section 108 - List of Activities by Plan Year and Project
  - [PR02](#) - Field Office Section 108 List of Loans by Loan Number and Fund Type
- Enhancements:
  - [PR30](#) - HQ User Management Data History Report
  - [PR31](#) - HUD Staff User Profile List – HQ
  - [PR07](#) - Drawdown Report by Voucher Number - All Vouchers
  - [PR07](#) - Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
  - [PR46](#) - HOME Flagged Activities Report
  - The following reports were updated with the new logo
    - PR100 - HTF Activity Status Report
    - PR100 - HTF Activity Status Report (Prompt on Year)
    - PR101 - Snapshot of HTF Performance
    - PR103 - HTF Beneficiary Report (Grantee)
    - PR103 - HTF Beneficiary Report (National)
    - PR104 - HTF High Priority Performance Goals

#### 3.2 Release 11.20

- New Reports:
  - [PR91](#) - HESG Grant Expenditure Deadline Review Dashboard
  - [PR91](#) - HESG Grant Expenditure Deadline Review Grid Report
- Enhancements:
  - [PR05](#) - HOPWA Drawdown Report by Project and Activity Grid Report
  - [PR05](#) - HOPWA Drawdown Report by Project and Activity
  - [PR07](#) - HOPWA Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
  - [PR46](#) - HOME Flagged Activities Report
  - [PR48](#) - HOME Open Activities Report
  - [PR48](#) - Post 2011 Activities Report
  - [PR48](#) - Post 2011 Homebuyer Activities Report
  - [PR91](#) - ESG Financial Summary
  - [PR91](#) - ESG Subrecipients Vouchers
  - [PR92](#) - ESG Financial Summary National and Field Office Report
  - [PR92](#) - ESG Financial Summary National and Field Office Report – Detail
  - [PR92](#) - ESG Recipient Detail Report
  - [PR93](#) - ESG Risk Status Report
  - Notes: As released 11.20.0 the following reports are excluding CARES Act grants.
    - PR56 - Current Period - FO Only
    - PR56 - Current Period - Grantee Only
    - PR56 - Current Period - HQ Only
    - PR56 - Historical Period - FO Only
    - Monthly CDBG Timely Performance Report

### 3.3 Release 11.21

- New Reports:
  - [PR26](#) - CDBG-CV Financial Summary Report
  - [PR28](#) - Grant Financial Summary
  - [PR91](#) - ESG -CV Financial Summary
- Enhancements:
  - [PR01](#) - HUD Grants and Program Income
  - [PR02](#) - List of Activities by Program Year and Project
  - [PR02](#) - List of Activities by Program Year and Project - HOPWA
  - [PR05](#) - Drawdown Report by Project and Activity
  - [PR05](#) - HOPWA Drawdown Report by Project and Activity
  - [PR05](#) - HOPWA Drawdown Report by Project and Activity Grid Report
  - [PR07](#) - Drawdown Report by Voucher Number - All Vouchers
  - [PR07](#) - Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
  - [PR07](#) - HOPWA Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
  - [PR07](#) - Outstanding Balances: Collections, Adjustments, Manual Payments
  - [PR26](#) - CDBG Financial Summary Report
  - [PR26](#) - CDBG Activity Summary by Selected Grant
  - [PR28](#) - Activity Summary
  - [PR28](#) - PER Financial Summary
  - [PR56](#) - Current Period - Grantee Only
  - [PR91](#) - ESG Financial Summary
  - [PR110](#) - HTF Production Report

### 3.4 Release 11.22

- New Reports:
  - [PR02](#) - List of Activities by Program Year and Project – HOPWA and HOPWA-C – Detailed Report
- Enhancements:
  - [PR107](#) - HTF Open Activities Report
  - [PR108](#) - HTF Deadline Compliance Status Report
  - [PR109](#) - Status of HTF Grants
  - [PR110](#) - HTF Production Report
  - [PR03](#) - CDBG/CDBG-R Activity Summary Report
  - [PR03](#) - BOSMAC (original)
  - [PR03c](#) - Public Service Activities
  - [PR03d](#) - Job Creation Activities with 0 jobs or that have exceeded \$35k per job
  - [PR20](#) - HOME Production Report
  - [PR26](#) - CDBG Activity Summary by Selected Grant
  - [PR26](#) - CDBG Financial Summary Report
  - [PR26](#) - CDBG-CV Financial Summary Report
  - [PR28](#) - PER Financial Summary

### 3.5 Release 11.23

- New Reports:
  - PR02
    - [PR02](#) - CDBG and CDBG-CV Activity Detail Report
    - [PR02](#) - List of Activities by Program Year and Project - HESG and HESG-CV - Detailed Report
  - [PR91](#) - HESG / HESG-CV Subrecipient Commitments and Draws by Activity Category
- Enhancements:
  - PR02
    - [PR02](#) - List of Activities by Program Year and Project – HOPWA and HOPWA-C – Detailed Report
    - [PR02](#) - List of Activities by Program Year and Project - HOPWA and HOPWA-C
    - [PR02](#) - List of Activities by Program Year and Project
  - [PR26](#) - CDBG Activity Summary by Selected Grant
  - PR50
    - [PR50](#) - Grantee - Selected CDBG/CDBG-CV Expenditure Report
    - [PR50](#) - National Detail - CDBG/CDBG-CV Expenditure Report
    - [PR50](#) - Summary for Entire Nation - CDBG/CDBG-CV Expenditure Report
  - PR51
    - [PR51](#) - Grantee - Selected CDBG/CDBG-CV Accomplishment Report
    - [PR51](#) - National Detail - Selected CDBG/CDBG-CV Accomplishment Report
    - [PR51](#) - National Summary - CDBG/CDBG-CV Accomplishment Report
  - PR92
    - [PR92](#) - ESG Financial Summary National and Field Office Report
    - [PR92](#) - ESG Financial Summary National and Field Office Report – Detail
  - PR105
    - [PR105](#) - Status of HTF Activities
    - [PR105](#) - Status of HTF Activities (Grid Report)

### 3.6 Release 11.24

- New Reports:
  - [PR 30](#) - Security Administrator User Profile List by Field Office
  - [PR29](#) - CDBG-CV Cash on Hand Quarterly Reports
  - [PR 93](#) - ESG-CV Risk Status Report
- Enhancements:
  - PR02
    - [PR02](#) - List of Activities by Program Year and Project - HOPWA and HOPWA-C
    - [PR02](#) – List of Activities by Program Year and Project – HOPWA and HOPWA-C – Detailed Report
  - PR05

- [PR 05](#) - HOPWA Drawdown Report by Project and Activity Grid Report
  - [PR 05](#) - HOPWA Drawdown Report by Project and Activity
- [PR07](#) - HOPWA Drawdown Report by Voucher Number - Vouchers Submitted to Loccs
- [PR 26](#) - CDBG Financial Summary Report
- [PR29](#) Cash on Hand Quarterly Reports
- [PR 50](#) - Grantee - Selected CDBG/CDBG-CV Expenditure Report
- [PR54](#)
  - [PR54](#) - National CDBG Performance Profile
  - [PR54](#) - Grantee CDBG Performance Profile
  - [PR54](#) - National CDBG Performance Profile - Executive Summary by Fiscal Year
- PR91
  - [PR91](#) ESG-CV Financial Summary Report
  - [PR91](#) - HESG Grant Expenditure Deadline Review Grid Report
  - [PR91](#) - HESG Grant Expenditure Deadline Review Dashboard
- [PR 93](#) - ESG Risk Status Report

## 4 Running Reports

This section first describes how to run a report that does not require input parameters, and then describes how to run a report that does require input parameters; also you will learn how to retrieve reports from your History List.

Before running a report, you should know:

- A daily refresh of data is done at night—so if you make any changes to the data in the IDIS Online application, those changes will not appear in the report until the next day.
- Many of the reports consist of more than one part.
- Each report part must be run separately.
- Reports may take longer to execute initially in MicroStrategy compared to IDIS Legacy, however, all further manipulation and formatting of the report will be easier and quicker for the user in the new IDIS using MicroStrategy functionality.
- One of the many improved features MicroStrategy report execution has to offer is that the report execution combines the multiple separate steps a user must complete in the IDIS Legacy application. For example, in IDIS Legacy, a user must run the report, download the report from a separate FTP site, and format the report.

### 4.1 Running a Report without Input Parameters

1. Log in to the IDIS Online application window as described in *Section 2, accessing the IDIS Online Application*.