
Integrated Disbursement and Information System (IDIS) Re-engineering

**U.S. Department of Housing and Urban Development (HUD)
Office of Community Planning and Development (CPD)**

IDIS Re-engineering Reports User Guide

January 21, 2009

Version 1.3

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1. Introduction

The **Integrated Disbursement and Information System (IDIS) Re-engineering** project is sponsored by the Office of Community Planning and Development (CPD) within the Department of Housing and Urban Development (HUD). IDIS-R is a real-time, web-based computer application that provides financial disbursement, tracking, and reporting activities for the CPD formula grant programs. Its primary purpose is to enable HUD grantees to drawdown program funds and report on the activities and accomplishments outlined in each jurisdiction's Consolidated Plan. IDIS-R provides timely performance information regarding accomplishments achieved with use of program funds, pursuant to the Government Performance and Results Act of 1993 (GPRA) and the specific requirements of the formula programs administered by CPD. IDIS-R programs include the Community Development Block Grant Program (CDBG), the HOME Investment Partnership Program (HOME), Emergency Shelter Grants (ESG), and Housing Opportunities for Persons with AIDS (HOPWA).

1.1 Design and Develop MicroStrategy Reports and Data Download Functionality

HUD currently has the functionality of 41 uniquely scoped reports. HUD has also identified an additional nine reports to be included in this re-engineering project. Where possible, the work already performed on the reports in IDIS Legacy will be leveraged.

The reports provided through use of the MicroStrategy environment will be integrated in a seamless manner with the operational functionality of the larger IDIS-R product. Thus, once the user is in IDIS, he or she will be able to perform traditional IDIS functions as well as viewing, printing, and saving a variety of reports.

2. Accessing the IDIS-R Application

This section describes how to log into the IDIS-R web application.

2.1 Logging In

To log in to the IDIS-R application in the **UAT** environment:

1. Type <https://www5.hud.gov/idis> in the **Address** field of your browser.

NOTE: The above URL may change when the application is in production.

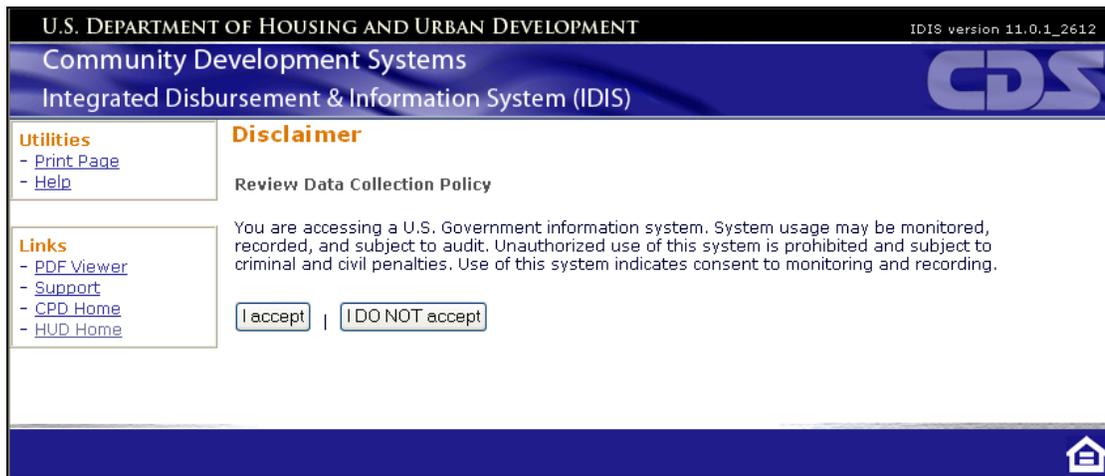
2. Press the **Enter** key.

The **IDIS Login** page is displayed.

The screenshot shows the IDIS Login page. On the left is a red sidebar with the 'Homes & Communities' logo and a navigation menu. The main content area has a white background with a red header. The header contains 'Community Planning & Development' and 'IDIS Login'. Below the header, there is a text prompt: 'Please enter your Username (C***** or H*****) and Password to log in.' The login form consists of two input fields: 'Username:' and 'Password:'. Below the fields is a 'Login' button. At the bottom of the page, there is a footer with links for 'FOIA', 'Privacy', 'Web Policies and Important Links', and 'Home', along with contact information for the U.S. Department of Housing and Urban Development.

3. Type your **H ID/C ID** and your **password** in the appropriate fields.
4. Click the **Login** button.

The **Disclaimer** page is displayed.

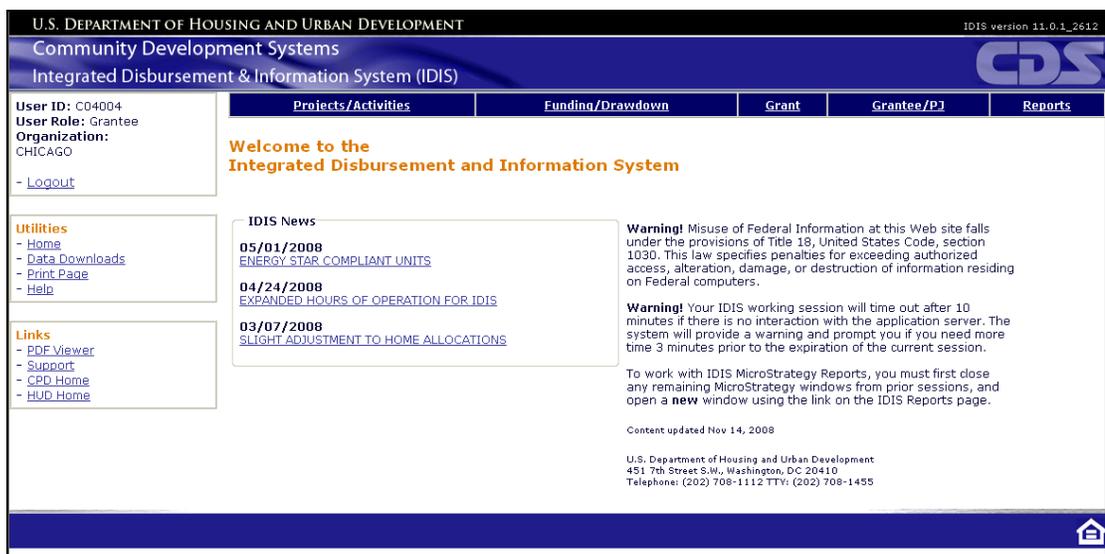


5. Click the **I accept** button.

If your userid has only one profile, you will be taken directly to the **Welcome** page. If your userid has multiple profiles, **Profile Selection** page is displayed with all your available **Profiles** listed. The **Profile Selection** will vary depending on your profile.

6. Select your profile, and then click the **Select Profile** button.

The **Welcome** page is displayed.



See the following section, *Running Reports*, for step-by-step procedures accessing the IDIS-R reporting capability and running a report.

3. 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.

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-R 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.

3.1 Running a Report Without Input Parameters

1. Log in to the IDIS-R application window as described in *Section 2, Accessing the IDIS-R Application*.
2. Click the **Reports** link in the menu bar.
 - For **Grantees** only, the **Report Parameters** page is displayed:
 - Not all reports require parameters.
 - In Phase 1, the only report that requires the Grantee to input report parameters is the **PR 26 CDBG Financial Summary Report**.

For Headquarter (HQ) and Field Office (FO) users, the **Report Parameters** page is NOT displayed. Instead, the window shown following Step 3 appears.

3. Click **View Reports** in the left menu.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
 Community Development Systems
 Integrated Disbursement & Information System (IDIS)

User ID: C04004
 User Role: Grantee
 Organization: CHICAGO
[Logout](#)

Report
[View Reports](#)
[Report Parameters](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Report

Report Parameters

Report Selection

Select a link in the table below to add or edit parameters for that report. Select "View Reports" link on the left navigation to run reports.

Report Number	Report Name	
C04PR26	CDBG Financial Summary Report	Add-Edit

4. Select the IDIS file name or icon.

- The **IDIS Reports** main page is displayed.
- Your name will appear in the greeting directly below the menu bar. If your name does not appear or an incorrect name is displayed, contact your IDIS system administrator.

Shared Reports My Reports Create Report History List Preferences Search Help Logout

>Welcome KIM A. STEPHENS.

View

Shared Reports
 Run reports and share reports with others.

My Reports
 Run your own reports and access favorites via shortcuts.

History List
 View reports you have run previously or which have been run for you via schedules.

Tools

Preferences
 General, Folder browsing, Grid display, Graph display, Export, Print (PDF), Drill mode, Prompts, Report Services, Security

Search
 Search for reports and documents.

- Click the **Shared Reports** name or icon.

The **Shared Reports** folder displays a folder for each of the Phase 1 predefined reports.



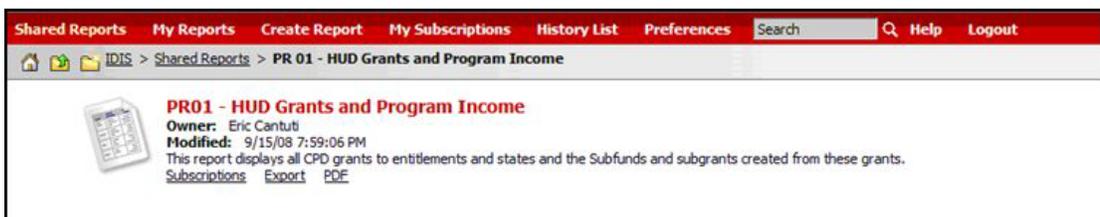
- Select the **folder name or icon** for the report you wish to run.

The following example shows the **PR 01 – HUD Grants and Program Income** folder.



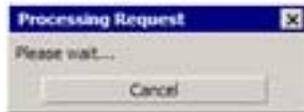
The selected folder opens and lists the available reports. Based on the nature of the report, a report may be broken down into multiple parts.

- In the following example, the report shown, PR 01, only has one part.
- If a report has multiple parts, each part is listed here as a separate report.
- Each report part must be run separately.



7. Select the desired report part to run.

You may see the following message indicating to “Please wait...” while the system is Processing Request. In the image below you will notice there is also a Cancel button to stop the report from running.

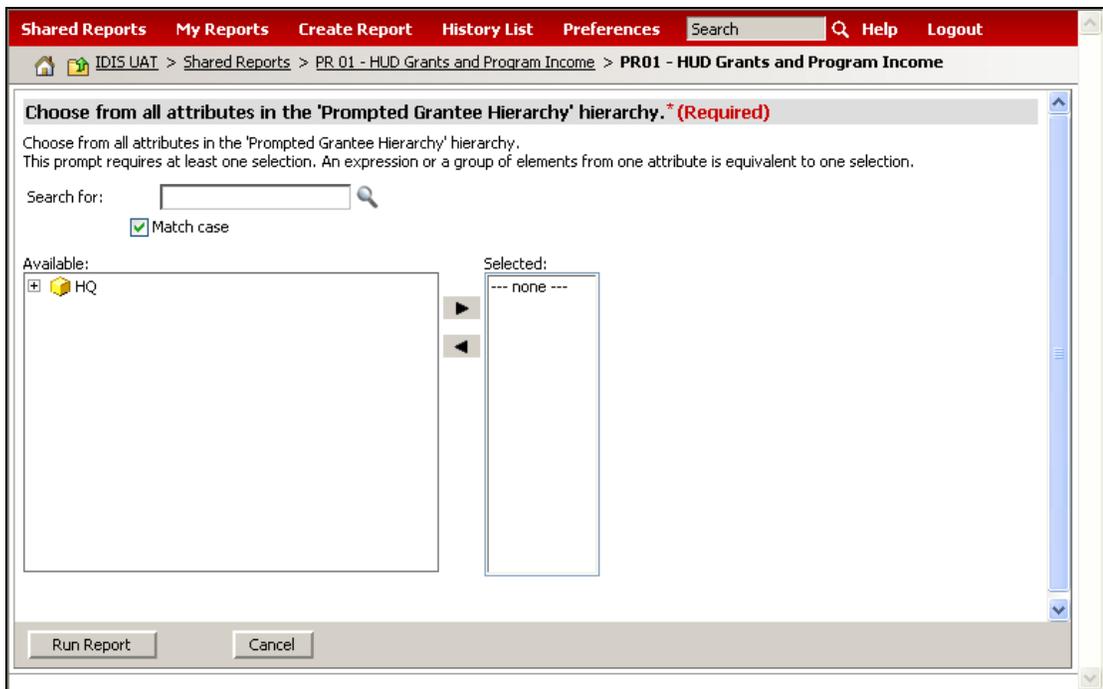


The **Prompt** page is displayed. It allows you to select the entity for which you want to run the report.

Scenario 1 – HQ Users

The example described below assumes the user has logged in as an HQ user. HQ users may run a report for any Field Office and/or any Grantee.

1. Select the plus symbol in front of the HQ box shown in the screen below.



A prompt will appear with the text **All**.

2. Select the plus symbol for the **All** prompt.

A prompt will appear with the text **Field Office**.

3. Select the plus symbol for **Field Office**.

The Hierarchy will display the list of all the Field Offices.

4. Select the desired Field Office and select the arrow pointing right.

Your selection(s) will appear in the **Selected:** box to the right.

For those reports that have built-in reporting by Field Office, (example: PR80, PR85), the Run Report selection will produce report data for the Field Office selected in the **Selected** box to the right.

5. HQ users also have the ability to run a report for a single Grantee.

Select the plus symbol next to the desired Field Office name.

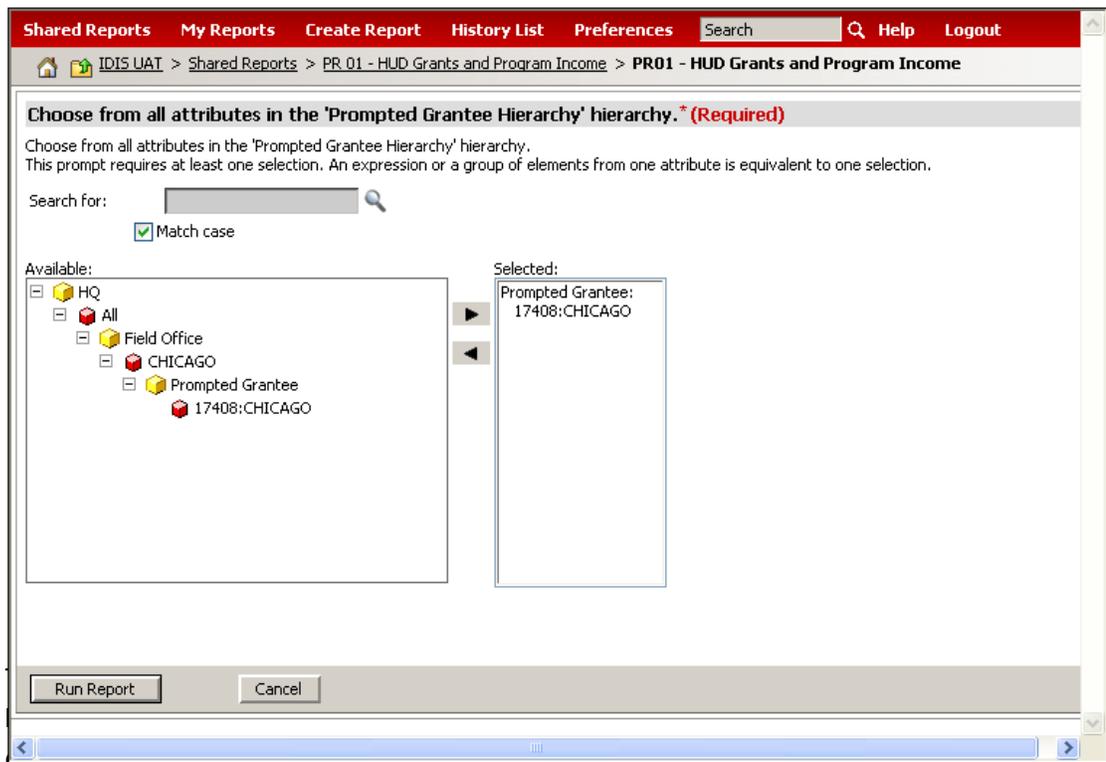
A prompt will appear with the text **Prompted Grantees**.

6. Select the plus symbol for **Prompted Grantees**.

The Hierarchy will display the list of all the Grantees in that Field Office.

7. Select the desired Grantee name and select the arrow pointing right.

Your selection appears in the **Selected** box to the right as shown below.



Run Report selection will produce report data for the selected Grantee in the **Selected** box to the right.

Scenario 2 – FO Users

The example described below assumes the user has logged in as FO user. FO users are limited to selecting only Grantees which fall under the purview of their Field Office.

The HQ box will still appear even though you are logged in as a Field Office.

1. Select the plus symbol in front of the **HQ** box shown in the screen above.

A prompt will appear with the text **All**.

2. Select the plus symbol for the **All** prompt.

A prompt will appear with the text **Field Office**.

3. Select the plus symbol for **Field Office**.

The Hierarchy will **ONLY** display the Field Office for the user logged into IDIS-R.

4. Select the plus symbol next to the user's Field Office name.

A prompt will appear with the text **Prompted Grantees**.

5. Select the plus symbol for **Prompted Grantees**.

The Hierarchy will **ONLY** display the list of Grantees in that Field Office.

6. Select the desired Grantee name and select the arrow pointing right.

The user's selection will appear in the **Selected** box to the right.

The Run Report selection will produce report data for the selected Grantee in the **Selected** box to the right.

Scenario 3 – Grantee Users

The example described below assumes the user has logged in as a Grantee user. Grantees are limited to select only their own Grantee name to run report data.

The HQ box will still appear even though you are logged in as a Field Office.

1. Select the plus symbol in front of the **HQ** box shown in the screen above.

A prompt will appear with the text **All**.

2. Select the plus symbol for the **All** prompt.

A prompt will appear with the text **Field Office**.

3. Select the plus symbol for the **Field Office**.

The Hierarchy will display **ONLY** the Field Office for the Grantee logged into IDIS-R.

4. Select the plus symbol next to the **Field Office** name.

A prompt will appear with the text **Prompted Grantees**.

5. Select the plus symbol for **Prompted Grantees**.

The Hierarchy will display ONLY the name of the Grantee logged in.

6. Select the Grantee name and select the arrow pointing right.

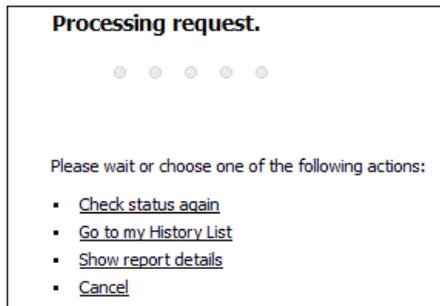
The user's selection will appear in the **Selected** box to the right.

The Run Report selection will produce report data for the selected Grantee in the **Selected** box to the right.

Once you have made your selection and it appears in the **Selected** box to the right,

8. Click the **Run Report** button.

You may see the following message:



The report results are displayed.

Program	Fund Type	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available to Draw
CDBG	EN	B83MC170006	\$110,192,761.00	\$0.00	\$110,192,761.00	\$110,192,761.00	\$0.00	\$0.00
		B87MC170006	\$85,565,367.00	\$0.00	\$85,565,367.00	\$85,565,367.00	\$0.00	\$0.00
		B88MC170006	\$80,290,556.00	\$0.00	\$80,290,556.00	\$80,290,556.00	\$0.00	\$0.00
		B89MC170006	\$83,533,162.00	\$0.00	\$83,533,162.00	\$83,533,162.00	\$0.00	\$0.00
		B90MC170006	\$80,058,141.00	\$0.00	\$80,058,141.00	\$80,058,141.00	\$0.00	\$0.00
		B91MC170006	\$89,092,859.00	\$0.00	\$89,092,859.00	\$89,092,859.00	\$0.00	\$0.00
		B92MC170006	\$98,035,326.00	\$0.00	\$98,035,326.00	\$98,035,326.00	\$0.00	\$0.00
		B93MC170006	\$107,767,000.00	\$0.00	\$107,767,000.00	\$107,767,000.00	\$0.00	\$0.00
		B94MC170006	\$118,943,000.00	\$0.00	\$118,943,000.00	\$118,943,000.00	\$0.00	\$0.00
		B95MC170006	\$118,823,000.00	\$0.00	\$118,823,000.00	\$118,823,000.00	\$0.00	\$0.00
		B96MC170006	\$115,659,000.00	\$0.00	\$115,659,000.00	\$115,659,000.00	\$0.00	\$0.00
		B97MC170006	\$113,704,000.00	\$0.00	\$113,704,000.00	\$113,704,000.00	\$0.00	\$0.00
		B98MC170006	\$109,438,000.00	\$0.00	\$109,438,000.00	\$109,438,000.00	\$0.00	\$0.00
		B99MC170006	\$110,103,000.00	\$0.00	\$110,103,000.00	\$110,103,000.00	\$0.00	\$0.00
		B00MC170006	\$107,502,000.00	\$0.00	\$107,502,000.00	\$107,502,000.00	\$0.00	\$0.00
		B01MC170006	\$113,122,000.00	\$0.00	\$113,122,000.00	\$113,122,000.00	\$0.00	\$0.00
		B02MC170006	\$107,216,453.00	\$0.00	\$107,216,453.00	\$107,216,453.00	\$0.00	\$0.00
		B03MC170006	\$102,364,000.00	\$0.00	\$102,364,000.00	\$102,364,000.00	\$0.00	\$0.00
		B04MC170006	\$100,852,000.00	\$0.00	\$100,852,000.00	\$100,852,000.00	\$0.00	\$0.00
		B05MC170006	\$95,490,820.00	\$0.00	\$95,490,820.00	\$95,490,820.00	\$0.00	\$0.00
		B06MC170006	\$85,858,436.00	\$0.00	\$85,858,436.00	\$85,858,436.00	\$0.00	\$0.00
		B07MC170006	\$86,084,851.00	\$0.00	\$86,084,851.00	\$69,672,652.61	\$0.00	\$16,412,198.39
		B08MC170006	\$82,723,276.00	\$0.00	\$62,115,274.80	\$0.00	\$20,608,001.20	\$82,723,276.00
			\$2,302,419,008.00	\$0.00	\$2,281,811,006.80	\$2,203,283,533.61	\$20,608,001.20	\$99,135,474.39

You can save or export the report results. See Section 6 for details about saving a report and Section 7 for details about exporting a report.

3.2 Running a Report with Input Parameters

If you want to run a report that requires input parameters, you must enter the parameters on the Parameter screen that is located in IDIS-R. In Phase 1, the only report requiring parameters is *PR 26 CDBG Financial Summary Report*. This section describes how to run that report. (Additional parameter selections will be added for additional reports in later phases.)

1. If you are in the **Report** window, return to the IDIS application window.

Note: You do not have to close the Report window before returning to the IDIS application window.
2. In the IDIS-R application window, click the **Reports** link in the menu bar.

The **Report Parameters** page is displayed.

The screenshot shows the IDIS-R interface. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_2612". Below that is a blue header for "Community Development Systems Integrated Disbursement & Information System (IDIS)" with the CDS logo. A navigation menu has tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", and "Reports". The "Reports" tab is active.

On the left, there are several navigation boxes:

- User ID:** C04004, **User Role:** Grantee, **Organization:** CHICAGO. Includes a [Logout](#) link.
- Report** section with [View Reports](#) and [Report Parameters](#) links.
- Utilities** section with [Home](#), [Data Downloads](#), [Print Page](#), and [Help](#) links.
- Links** section with [PDF Viewer](#), [Support](#), [CPD Home](#), and [HUD Home](#) links.

The main content area is titled "Report" and "Report Parameters". It includes a "Report Selection" section with the instruction: "Select a link in the table below to add or edit parameters for that report. Select 'View Reports' link on the left navigation to run reports." Below this is a table:

Report Number	Report Name	
CD4PR26	CDBG Financial Summary Report	Add-Edit

At the bottom right of the page is a home icon.

3. Click the **Add-Edit** link next to the report name of the report you want to run.

The **Add Parameters** or **Edit Parameters** page is displayed. The following figure shows the parameters for the **CDBG Financial Summary Report**.

The screenshot shows the 'Add Parameters' page for the 'CDBG Financial Summary Report'. The page includes a navigation menu on the left with sections for User ID, Report, Utilities, and Links. The main content area features a table of parameters and a 'Report Parameters for program year' field.

Line Number/Parameter	Value (up)
01. Unexpended CDBG funds at end of previous reporting period	0.00
03. Surplus Urban Renewal	0.00
04. Section 108 Guaranteed Loan Fund	0.00
07. Expended for low/mod housing in special areas	0.00
10. Adjustment to compute total amount subject to low/mod benefit	0.00
14. Adjust to compute total expenditures	0.00
17. Expended for low/mod housing in special areas	0.00
18. Expended for low/mod multi-unit housing	0.00
20. Adjustment to compute total low/mod credit	0.00
23. Program years (PY) covered in certification	PY <input type="text"/> PY <input type="text"/> PY <input type="text"/>
24. Cumulative net exp subject to low/mod benefit calculation	0.00
25. Cumulative expenditures benefitting low/mod persons	0.00
28. PS unliquidated obligations at end of current PY	0.00
29. PS unliquidated obligations at end of previous PY	0.00
30. Adjustment to compute total PS obligations	0.00
34. Adjustment to compute total subject to PS cap	0.00
38. PA unliquidated obligations at end of current PY	0.00
39. PA unliquidated obligations at end of previous PY	0.00
40. Adjustment to compute total planning/admin obligation	0.00
44. Adjustment to compute total subject to planning/admin cap	0.00

Additional fields on the page include: Grantee Name: CHICAGO, IL; * Report Parameters for program year: ; and buttons for Save and Return.

4. Enter a program year in the **Report Parameters for program year** field.

If a year has already been entered, you can add another year to the report by clicking the **Add Another Year**, and then entering the new year. Users may also change the parameters for a previously entered year, save those changes and re-run the report.

5. Enter values in for the desired parameters.

You do not have to enter a value for every parameter.

6. Click **Save**.

The following screen is displayed with a message showing that your Parameters have been saved successfully.

The screenshot displays the IDIS Reports interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_2718. The main header is 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. Below this is a navigation bar with tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', and 'Reports'. The 'Reports' tab is selected.

On the left side, there is a user information box showing 'User ID: C04004', 'User Role: Grantee', and 'Organization: CHICAGO'. Below this are links for 'Logout', 'View Reports', and 'Report Parameters'. There are also utility links like 'Home', 'Data Downloads', 'Print Page', and 'Help', and a 'Links' section with 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'.

The main content area is titled 'Report' and contains a message: 'Parameters saved successfully.' Below this is a section for 'Report Selection' with instructions: 'Select a link in the table below to add or edit parameters for that report. Select "View Reports" link on the left navigation to run reports.'

Report Number	Report Name	
C04PR26	CDBG Financial Summary Report	Add-Edit

A home icon is visible in the bottom right corner of the interface.

To run the report, continue by following the steps described in Section 3.1, beginning with Step 2.

4. IDIS-R Reports Interface

This section describes the user interface for running IDIS-R predefined reports.

4.1 User Authorizations

Your IDIS-R user name is linked to a specific authorization level in IDIS-R. Unless you are an IDIS-R system administrator, you have the general user authorization. General users are authorized to **run, display, customize, save, export, and print** any report that is available in the **Shared Reports** folder.

4.2 IDIS-R Reports Home Page

You will use the following features the most often:

- **Shared Reports** – Displays the predefined reports listed for Phase1. Anyone with access to IDIS-R is authorized to view, customize, save, export, and print these reports.
- **My Reports** – Every IDIS-R user has his or her own location to store reports that have been customized to meet specific needs. When a report is saved to **My Reports**, only the authorized user can access it.
- **History List** – IDIS users have the ability to run and store report results in their **History List** for future retrieval. This enables users to refer back to the report several times throughout the day without having to re-run the report.
- Some reports may take several minutes to run. This feature allows you to have your report continue to run if you decide you would like perform other activities in reports or IDIS while the report is running.
- **Preferences** – Allows users to customize various features of the reporting application.

4.3 Buttons

The buttons enable you to perform actions on top of the displayed report. Key buttons are described below in Table 1.

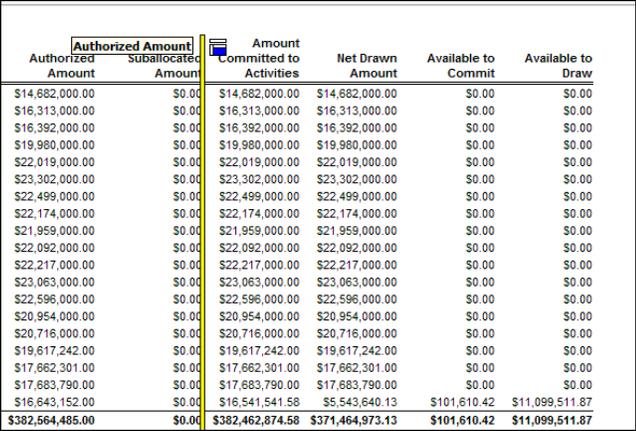
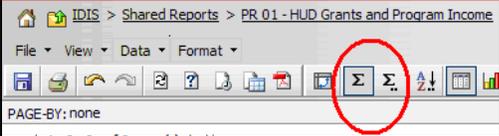
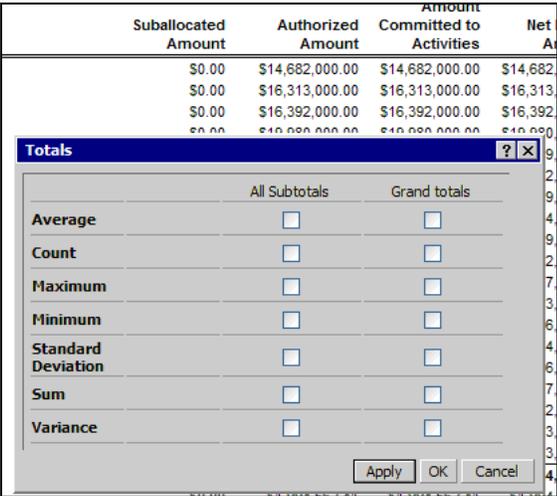
Table 1. Key Buttons

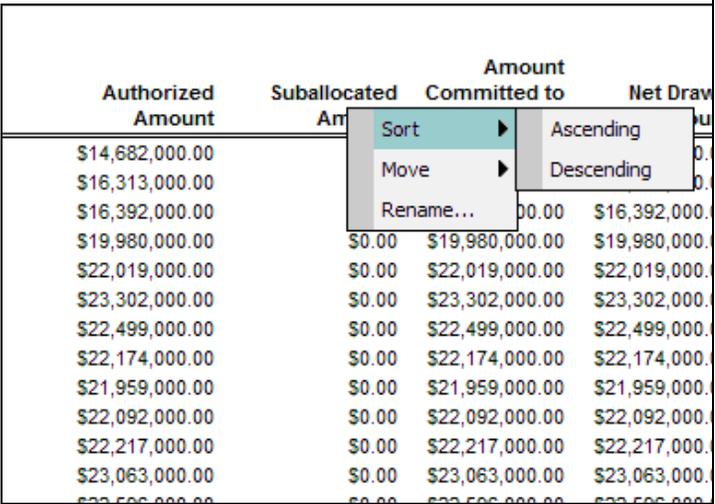
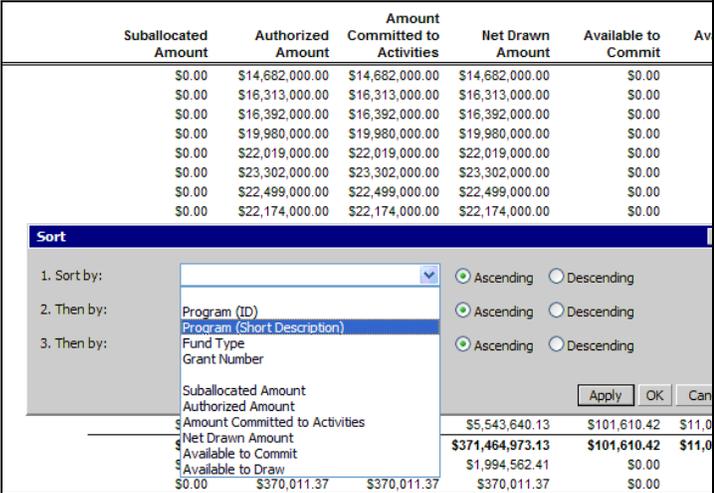
Icon	Name	Description
	Save	Enables you to save the displayed report to My Reports
	Print	Enables you to print the report directly in IDIS
	Export	Enables you to export the displayed report to an Excel spreadsheet
	Create PDF	Enables you to export the displayed report to a PDF file

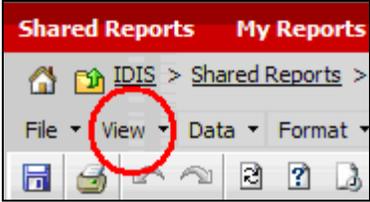
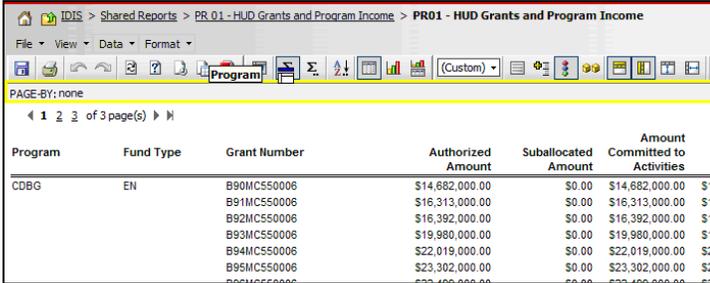
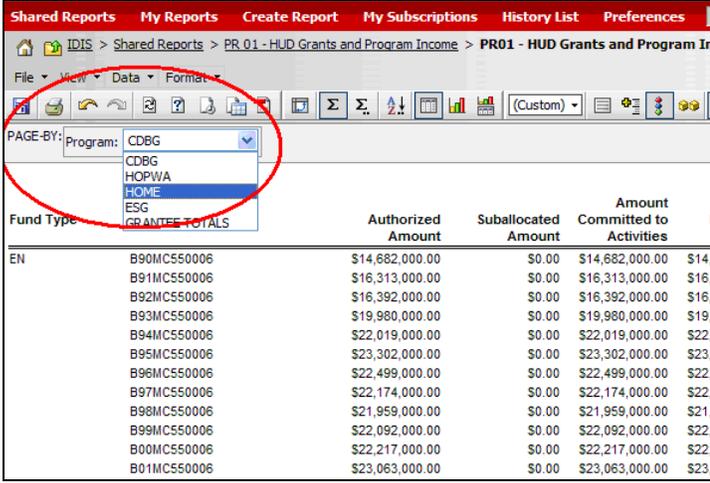
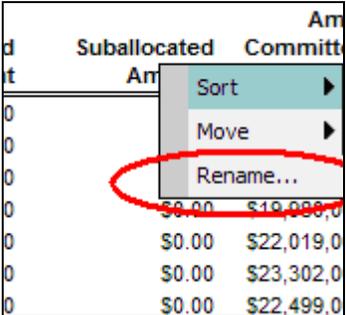
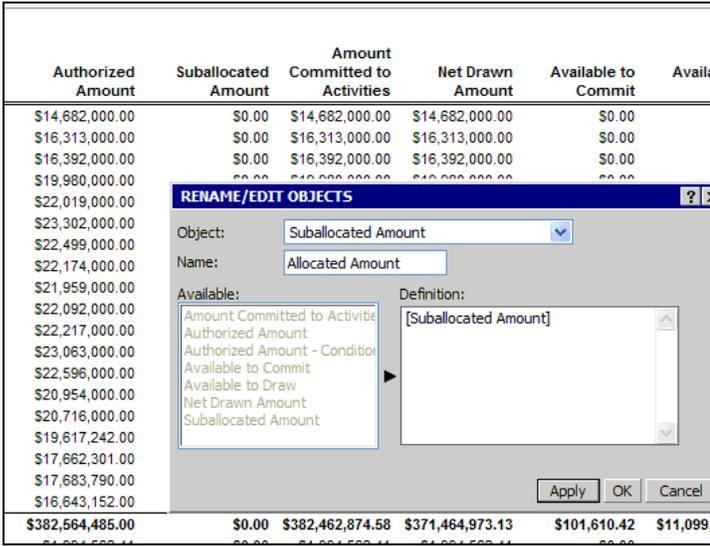
5. Customizing Your Reports

You can customize the content and appearance of your reports. This section describes some of the key features that you can use to customize your reports. Table 2 describes the most useful features customizing your reports.

Table 2. Features to Customize Your Reports

Feature	Example																																																																																																																														
<p>Modify Column Order</p> <p>Once a report is displayed in the window, you can easily drag and move columns.</p> <p>Using the mouse, left-click on a particular column, and then drag it to the left or right.</p>	<p>In the following example, the user is moving the Authorized Amount column to the right of Suballocated Amount.</p>  <table border="1" data-bbox="737 667 1373 1098"> <thead> <tr> <th>Authorized Amount</th> <th>Suballocated Amount</th> <th>Amount Committed to Activities</th> <th>Net Drawn Amount</th> <th>Available to Commit</th> <th>Available to Draw</th> </tr> </thead> <tbody> <tr><td>\$14,682,000.00</td><td>\$0.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,313,000.00</td><td>\$0.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,392,000.00</td><td>\$0.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$19,980,000.00</td><td>\$0.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,019,000.00</td><td>\$0.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$23,302,000.00</td><td>\$0.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,499,000.00</td><td>\$0.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,174,000.00</td><td>\$0.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$21,959,000.00</td><td>\$0.00</td><td>\$21,959,000.00</td><td>\$21,959,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,092,000.00</td><td>\$0.00</td><td>\$22,092,000.00</td><td>\$22,092,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,217,000.00</td><td>\$0.00</td><td>\$22,217,000.00</td><td>\$22,217,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$23,063,000.00</td><td>\$0.00</td><td>\$23,063,000.00</td><td>\$23,063,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,596,000.00</td><td>\$0.00</td><td>\$22,596,000.00</td><td>\$22,596,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$20,954,000.00</td><td>\$0.00</td><td>\$20,954,000.00</td><td>\$20,954,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$20,716,000.00</td><td>\$0.00</td><td>\$20,716,000.00</td><td>\$20,716,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$19,617,242.00</td><td>\$0.00</td><td>\$19,617,242.00</td><td>\$19,617,242.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$17,662,301.00</td><td>\$0.00</td><td>\$17,662,301.00</td><td>\$17,662,301.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$17,683,790.00</td><td>\$0.00</td><td>\$17,683,790.00</td><td>\$17,683,790.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,643,152.00</td><td>\$0.00</td><td>\$16,541,541.58</td><td>\$5,543,640.13</td><td>\$101,610.42</td><td>\$11,099,511.87</td></tr> <tr><td>\$382,664,485.00</td><td>\$0.00</td><td>\$382,462,874.58</td><td>\$371,464,973.13</td><td>\$101,610.42</td><td>\$11,099,511.87</td></tr> </tbody> </table>	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available to Draw	\$14,682,000.00	\$0.00	\$14,682,000.00	\$14,682,000.00	\$0.00	\$0.00	\$16,313,000.00	\$0.00	\$16,313,000.00	\$16,313,000.00	\$0.00	\$0.00	\$16,392,000.00	\$0.00	\$16,392,000.00	\$16,392,000.00	\$0.00	\$0.00	\$19,980,000.00	\$0.00	\$19,980,000.00	\$19,980,000.00	\$0.00	\$0.00	\$22,019,000.00	\$0.00	\$22,019,000.00	\$22,019,000.00	\$0.00	\$0.00	\$23,302,000.00	\$0.00	\$23,302,000.00	\$23,302,000.00	\$0.00	\$0.00	\$22,499,000.00	\$0.00	\$22,499,000.00	\$22,499,000.00	\$0.00	\$0.00	\$22,174,000.00	\$0.00	\$22,174,000.00	\$22,174,000.00	\$0.00	\$0.00	\$21,959,000.00	\$0.00	\$21,959,000.00	\$21,959,000.00	\$0.00	\$0.00	\$22,092,000.00	\$0.00	\$22,092,000.00	\$22,092,000.00	\$0.00	\$0.00	\$22,217,000.00	\$0.00	\$22,217,000.00	\$22,217,000.00	\$0.00	\$0.00	\$23,063,000.00	\$0.00	\$23,063,000.00	\$23,063,000.00	\$0.00	\$0.00	\$22,596,000.00	\$0.00	\$22,596,000.00	\$22,596,000.00	\$0.00	\$0.00	\$20,954,000.00	\$0.00	\$20,954,000.00	\$20,954,000.00	\$0.00	\$0.00	\$20,716,000.00	\$0.00	\$20,716,000.00	\$20,716,000.00	\$0.00	\$0.00	\$19,617,242.00	\$0.00	\$19,617,242.00	\$19,617,242.00	\$0.00	\$0.00	\$17,662,301.00	\$0.00	\$17,662,301.00	\$17,662,301.00	\$0.00	\$0.00	\$17,683,790.00	\$0.00	\$17,683,790.00	\$17,683,790.00	\$0.00	\$0.00	\$16,643,152.00	\$0.00	\$16,541,541.58	\$5,543,640.13	\$101,610.42	\$11,099,511.87	\$382,664,485.00	\$0.00	\$382,462,874.58	\$371,464,973.13	\$101,610.42	\$11,099,511.87
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<p>Totals and Subtotals</p> <p>You can add and modify totals and subtotals.</p> <p>Click the Sigma icon to display the Totals/Subtotals menu:</p> 	 <table border="1" data-bbox="776 1129 1333 1625"> <thead> <tr> <th></th> <th>Suballocated Amount</th> <th>Authorized Amount</th> <th>Amount Committed to Activities</th> <th>Net A</th> </tr> </thead> <tbody> <tr><td></td><td>\$0.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$14,682</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$16,313</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$16,392</td></tr> <tr><td></td><td>\$0.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$19,980</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$22,019</td></tr> <tr><td></td><td>\$0.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$23,302</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$22,499</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$22,174</td></tr> <tr><td></td><td>\$0.00</td><td>\$21,959,000.00</td><td>\$21,959,000.00</td><td>\$21,959</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,092,000.00</td><td>\$22,092,000.00</td><td>\$22,092</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,217,000.00</td><td>\$22,217,000.00</td><td>\$22,217</td></tr> <tr><td></td><td>\$0.00</td><td>\$23,063,000.00</td><td>\$23,063,000.00</td><td>\$23,063</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,596,000.00</td><td>\$22,596,000.00</td><td>\$22,596</td></tr> <tr><td></td><td>\$0.00</td><td>\$20,954,000.00</td><td>\$20,954,000.00</td><td>\$20,954</td></tr> <tr><td></td><td>\$0.00</td><td>\$20,716,000.00</td><td>\$20,716,000.00</td><td>\$20,716</td></tr> <tr><td></td><td>\$0.00</td><td>\$19,617,242.00</td><td>\$19,617,242.00</td><td>\$19,617</td></tr> <tr><td></td><td>\$0.00</td><td>\$17,662,301.00</td><td>\$17,662,301.00</td><td>\$17,662</td></tr> <tr><td></td><td>\$0.00</td><td>\$17,683,790.00</td><td>\$17,683,790.00</td><td>\$17,683</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,643,152.00</td><td>\$16,541,541.58</td><td>\$16,643</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,541,541.58</td><td>\$5,543,640.13</td><td>\$16,541</td></tr> <tr><td></td><td>\$0.00</td><td>\$382,462,874.58</td><td>\$371,464,973.13</td><td>\$382,462</td></tr> <tr><td></td><td>\$0.00</td><td>\$382,462,874.58</td><td>\$371,464,973.13</td><td>\$382,462</td></tr> </tbody> </table>		Suballocated Amount	Authorized Amount	Amount Committed to Activities	Net A		\$0.00	\$14,682,000.00	\$14,682,000.00	\$14,682		\$0.00	\$16,313,000.00	\$16,313,000.00	\$16,313		\$0.00	\$16,392,000.00	\$16,392,000.00	\$16,392		\$0.00	\$19,980,000.00	\$19,980,000.00	\$19,980		\$0.00	\$22,019,000.00	\$22,019,000.00	\$22,019		\$0.00	\$23,302,000.00	\$23,302,000.00	\$23,302		\$0.00	\$22,499,000.00	\$22,499,000.00	\$22,499		\$0.00	\$22,174,000.00	\$22,174,000.00	\$22,174		\$0.00	\$21,959,000.00	\$21,959,000.00	\$21,959		\$0.00	\$22,092,000.00	\$22,092,000.00	\$22,092		\$0.00	\$22,217,000.00	\$22,217,000.00	\$22,217		\$0.00	\$23,063,000.00	\$23,063,000.00	\$23,063		\$0.00	\$22,596,000.00	\$22,596,000.00	\$22,596		\$0.00	\$20,954,000.00	\$20,954,000.00	\$20,954		\$0.00	\$20,716,000.00	\$20,716,000.00	\$20,716		\$0.00	\$19,617,242.00	\$19,617,242.00	\$19,617		\$0.00	\$17,662,301.00	\$17,662,301.00	\$17,662		\$0.00	\$17,683,790.00	\$17,683,790.00	\$17,683		\$0.00	\$16,643,152.00	\$16,541,541.58	\$16,643		\$0.00	\$16,541,541.58	\$5,543,640.13	\$16,541		\$0.00	\$382,462,874.58	\$371,464,973.13	\$382,462		\$0.00	\$382,462,874.58	\$371,464,973.13	\$382,462											
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<p>Advanced Sorting</p> <p>You can sort each column as well as to enable advanced sorting on up to three different criteria.</p> <p>Click the Sort icon to enable advanced sorting.</p>	 <table border="1"> <thead> <tr> <th>Suballocated Amount</th> <th>Authorized Amount</th> <th>Amount Committed to Activities</th> <th>Net Drawn Amount</th> <th>Available to Commit</th> <th>Av</th> </tr> </thead> <tbody> <tr><td>\$0.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$0.00</td><td></td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Suballocated Amount</th> <th>Authorized Amount</th> <th>Amount Committed to Activities</th> <th>Net Drawn Amount</th> <th>Available to Commit</th> <th>Av</th> </tr> </thead> <tbody> <tr><td>\$5,543,640.13</td><td></td><td></td><td></td><td>\$101,610.42</td><td>\$11.0</td></tr> <tr><td></td><td></td><td></td><td>\$371,464,973.13</td><td>\$101,610.42</td><td>\$11.0</td></tr> <tr><td></td><td></td><td></td><td>\$1,994,562.41</td><td>\$0.00</td><td></td></tr> <tr><td>\$0.00</td><td>\$370,011.37</td><td>\$370,011.37</td><td>\$370,011.37</td><td>\$0.00</td><td></td></tr> </tbody> </table>	Suballocated Amount	Authorized Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Av	\$0.00	\$14,682,000.00	\$14,682,000.00	\$14,682,000.00	\$0.00		\$0.00	\$16,313,000.00	\$16,313,000.00	\$16,313,000.00	\$0.00		\$0.00	\$16,392,000.00	\$16,392,000.00	\$16,392,000.00	\$0.00		\$0.00	\$19,980,000.00	\$19,980,000.00	\$19,980,000.00	\$0.00		\$0.00	\$22,019,000.00	\$22,019,000.00	\$22,019,000.00	\$0.00		\$0.00	\$23,302,000.00	\$23,302,000.00	\$23,302,000.00	\$0.00		\$0.00	\$22,499,000.00	\$22,499,000.00	\$22,499,000.00	\$0.00		\$0.00	\$22,174,000.00	\$22,174,000.00	\$22,174,000.00	\$0.00		Suballocated Amount	Authorized Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Av	\$5,543,640.13				\$101,610.42	\$11.0				\$371,464,973.13	\$101,610.42	\$11.0				\$1,994,562.41	\$0.00		\$0.00	\$370,011.37	\$370,011.37	\$370,011.37	\$0.00	
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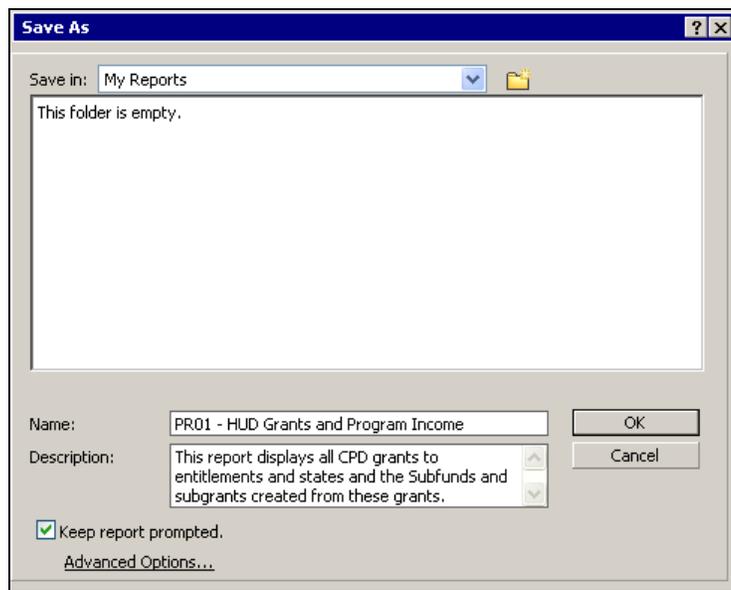
Feature	Example
<p>Grouping Data Using Parameters</p> <p>The Page By functionality allows you to dynamically slice and dice the data and group it by various parameters.</p> <p>To enable Page by, select the View menu, and then Page By Selection.</p>  <p>The Page By section will be displayed as shown in the example.</p>	<p>In the following example, the Program attribute is being moved to the Page-by field:</p>  <p>Now the report can be dynamically filtered by Program.</p> 
<p>Rename Report Objects</p> <p>You can rename report objects such as column headers to better fit your needs.</p> <p>Rename the display name of report objects by right-clicking on a column and then selecting the Rename option.</p> 	<p>In the following example, the user is renaming the column header from Suballocated Amount to Allocated Amount.</p> 

6. Saving a Report

After you have customized and run a particular report, you can save your customizations in your personal folder (**My Reports**). This enables you to go back and run the custom formatted report without needing to reformat the report every time.

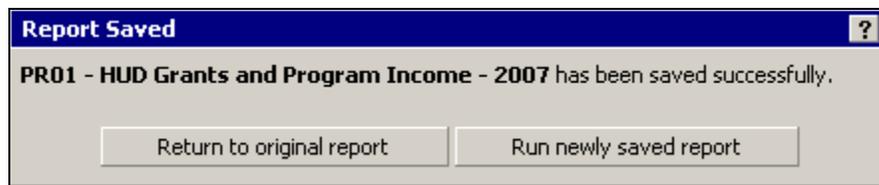
1. In the report window, select **Save As** from the **File** menu.
2. In the **Save As** dialog that appears, type the new name of the report in the **Name** field.

You can save your prompt criteria by deselecting the **Keep report prompted** checkbox. This eliminates the need to have to answer the prompt every time you run this report.



3. Click the **OK** button.

The **Report Saved** dialog is displayed.



4. Click the **Return to original report** button.

The original report is displayed.

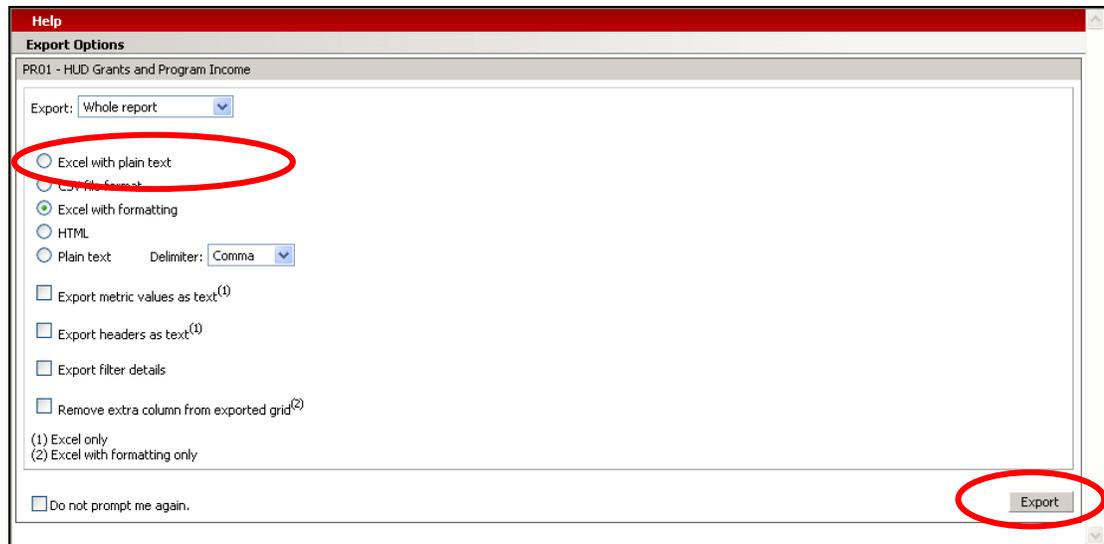
7. Exporting a Report to Excel and/or PDF

This section explains how to export and save your reports to either Excel or PDF for future use.

7.1 Export and Save to Excel

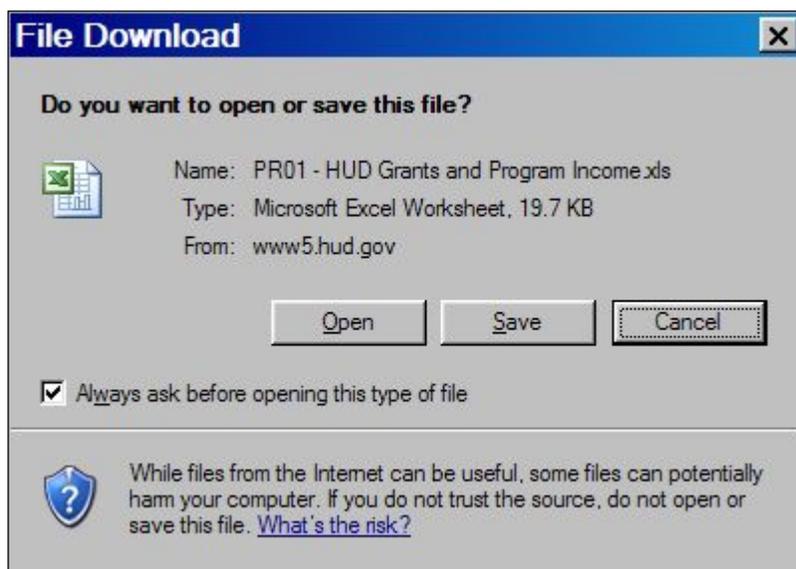
1. In the report window, select **Export** from the **File** menu.

A list of export options is displayed. The default option is **Excel with formatting**.



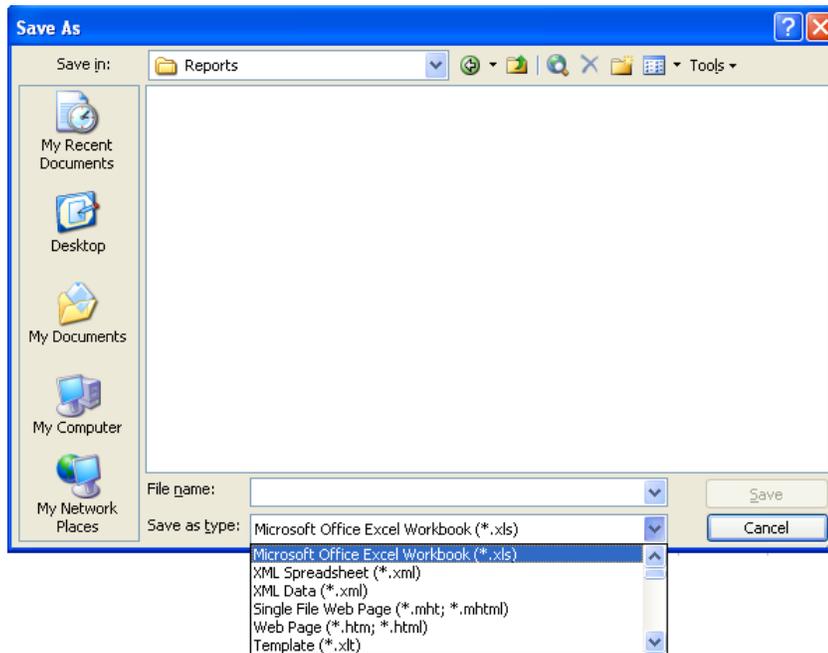
2. Select the option **Excel with plain text** if it is not already selected.
3. Click the **Export** button in the lower right corner.

The **File Download** window appears. The user has the option of selecting **Open**, **Save** or **Cancel** the report download as shown in the figure below.



5. Save the report:

- From the **File** menu in the browser window displaying the report, select the **Save As** option.
- In the **Save As** dialog that appears, locate and open the folder where you want to save the report.
- Enter a name for the report in the **File name** field.



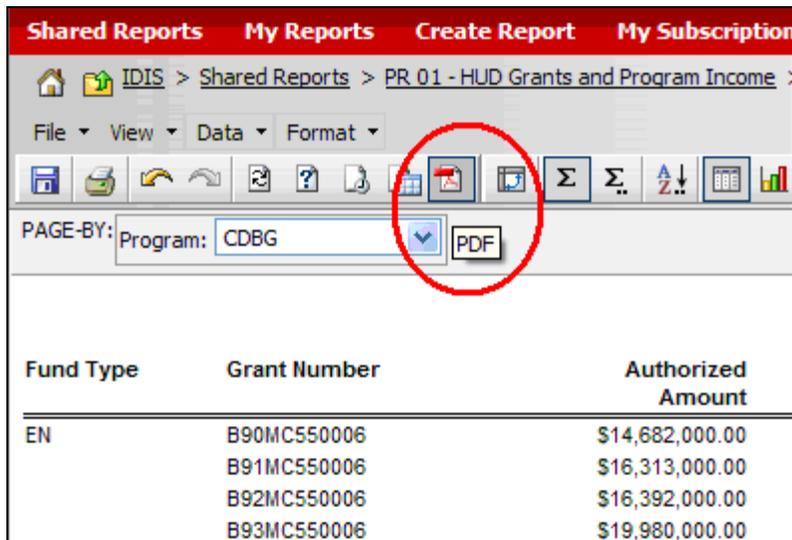
6. Select **Microsoft Excel Workbook (*.xls)** from the list of file type options.

7. Click the **Save** button.

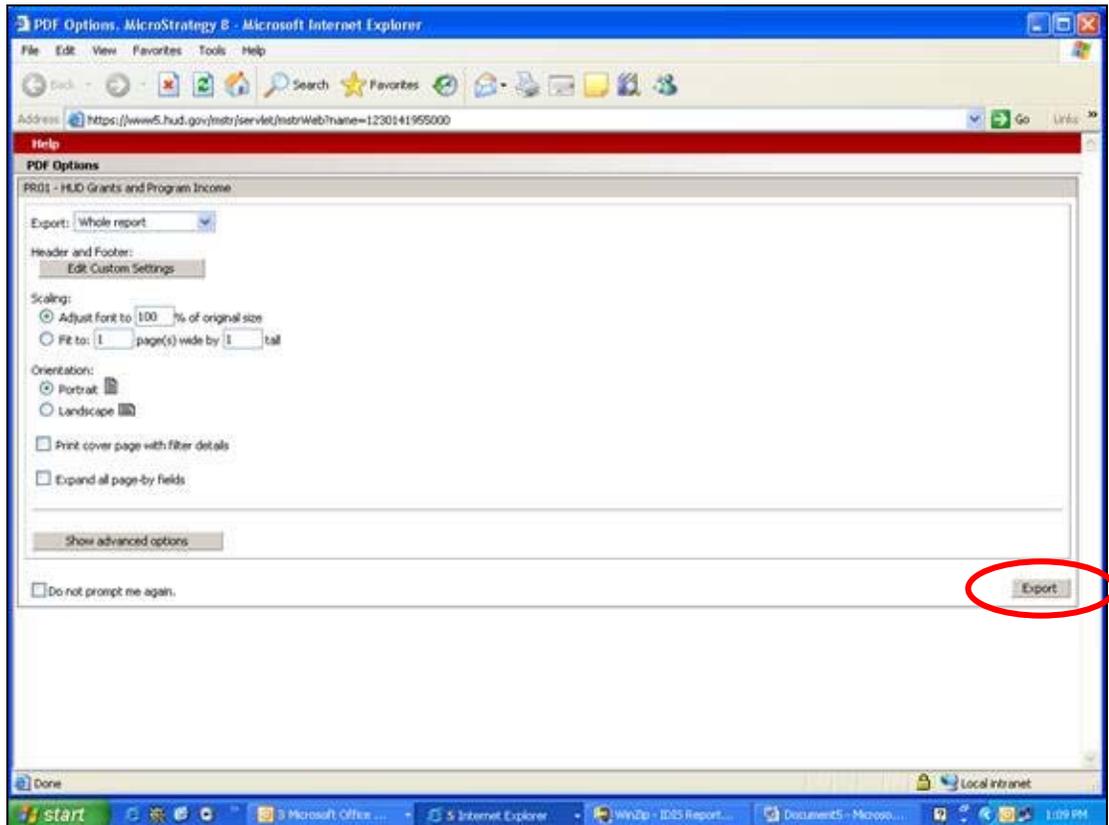
The report is now saved as an Excel file.

7.2 Export and Save to PDF

Alternatively, you can export reports to PDF by selecting the PDF icon as shown on the right.

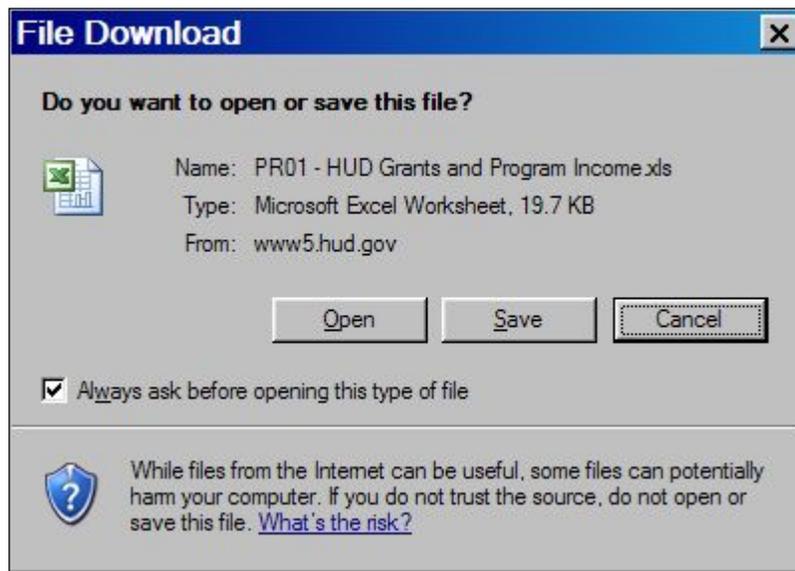


A list of export options is displayed.



8. Select the desired options from the screen above.
9. Click the **Export** button in the lower right corner.

The **File Download** window appears. The user has the option of selecting **Open**, **Save** or **Cancel** the report download as shown in the figure below.



10. Select the **Open** button from the **File Download** screen displayed above.
- The report is displayed as a PDF document.

8. Logging Out

Currently, when the **Logout** button is selected from within the Reports the Login screen shown in Section 2 will appear. The user will be required to re-authenticate by entering their username and password again to return to the IDIS-R application.

NOTE: The Logout feature is still under construction.

The user also has the option of closing the Reports window by selecting the **X** in the upper right corner of the window. This option will result in the same scenario described in the above paragraph.

According to HUD policy, you will be automatically logged out of IDIS-R if your session is inactive for more than **20 minutes**. If you are running a report that takes longer than 20 minutes, save the report in your **History** folder so that you do not lose the report if your session does time out after 20 minutes.