Chapter 19: Reports

Table of Contents

Chapter 19: Reports 19-1
19.1 Overview 19-3
19.2 The Reports Module 19-4
19.3 Shared Reports 19-7
19.4 Generating, Saving and Printing Reports 19-7
19.4.1 Reports in Portable Document Format (PDF) 19-7
19.4.2 Reports in MS Excel Format 19-14
19.5 Report Parameters 19-22
19.6 History List 19-30
19.7 Report Names and Parameters 19-33
19.7.1 Reports and Parameters 19-34

List of Figures

19-1 Reports Welcome page 19-4
19-2. iREMS Reports Home page 19-5
19-3. Home Page Toolbar 19-5
19-4. Welcome page 19-7
19-5. Reports Home page 19-8
19-6. PBCA folder 19-8
19-7. PBCA Reports List page 19-8
19-8. Toolbar at the top of the report 19-11
19-9. Sample Report in PDF 19-12
19-10. The Save a Copy page 19-12
19-11. Toolbar 19-13
19-12. Print page 19-13
19-13. Welcome page 19-14
19-14. Reports Home page 19-14
19-15. Shared Reports page 19-15
19-16. PBCA Reports page 19-15
19-17. Save options page 19-19
19-18. Save As selection 19-19
19-19. Save As page 19-20
19-20. File Options page 19-21

19-21. Print page 19-22
19-22. Export button 19-22
19-23. Parameter page 19-23
19-24. Example of MS Excel format 19-24
19-25. Date calendar example 19-24
19-26. Date parameter with required data 19-25
19-27. Search on User's Name 19-25
19-28. Name search 19-26
19-29. On screen list 19-26
19-30. Drop-down list 19-26
19-31. Example of Blank with definitions 19-27
19-32. Blank for HUB and Servicing Site 19-27
19-33. None for HUB and Servicing Site 19-28
19-34. All for HUB and Servicing Site 19-28
19-35. Sample Report 19-29
19-36. Sample Parameter Summary page 19-29
19-37. Reports Home page 19-30
19-38. PBCA folder 19-30
19-39. PBCA Reports page 19-31
19-40. Parameters page 19-31
19-41. Processing/Status page 19-32
19-42. iREMS report Welcome page 19-32
19-43. Reports Home page 19-32
19-44. History List page 19-33
19-45. Expiring or Expired Contracts Pending page 19-33

19

Reports

iREMS now uses MicroStrategy to generate reports. MicroStrategy is a powerful reporting tool that HUD is using as its standard reporting utility. The previous Actuate standard reports have now been reformatted into the MicroStrategy reporting solution. This reporting tool allows users to select specific criteria to ensure that only the desired data is generated.

All iREMS users, with a secure system ID, have access to the reporting module. Your user ID will determine which reports you can generate, view and store.

PBCA users that are currently participating in the Auto OCAF Pilot have access to generate three new Auto OCAF reports. Although all PBCAs can access these reports, if a non participating PBCA attempts to generate a report, no data will display.

Objectives:

By the end of this chapter, you will be able to:

- Identify Report Categories
- Generate Reports in PDF
- Generate Reports in MS Excel
- Understand the Parameters
- Print and Save Reports

19.1 Overview

MicroStrategy, a powerful reporting tool is used to generate reports for Multifamily Housing (Housing), Departmental Enforcement Center (DEC), and Contract Administration Oversight Monitors (CAOM) and

Performance Based Contract Administrators (PBCA) information. These reports are used for data tracking and portfolio management. The level of access to each report is designated by the user's role and security ID.

All reports allow users to select pre-defined criteria that suit their individual needs. Most reports are generated from the same criteria. If the report requires other report-specific criteria, those fields are automatically included on the Selection Criteria page.

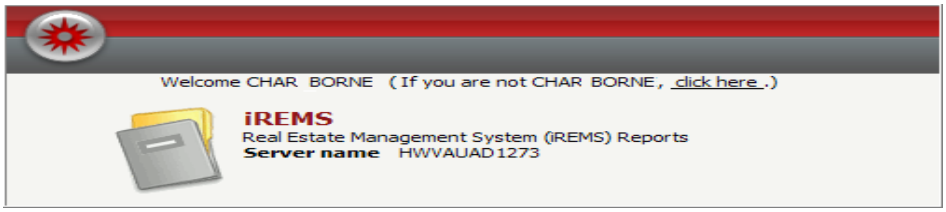
19.2 The Reports Module

In iREMS the report module can be accessed by selecting the Reports tab from any page.



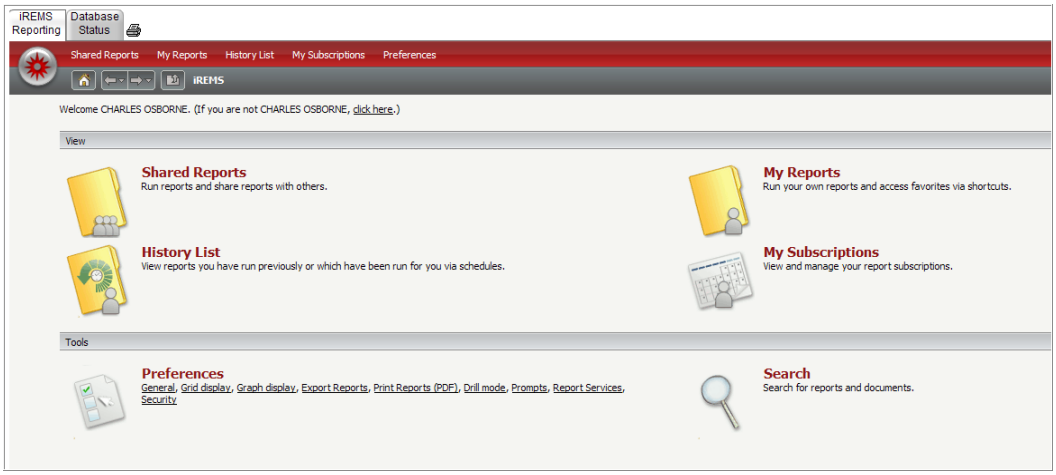
To access Report Module:

1. Log into iREMS and click on the Reports tab. You will be navigated to the MicroStrategy reports Welcome page.



19-1 Reports Welcome page

2. Click on the iREMS project folder to access the reports Home page.



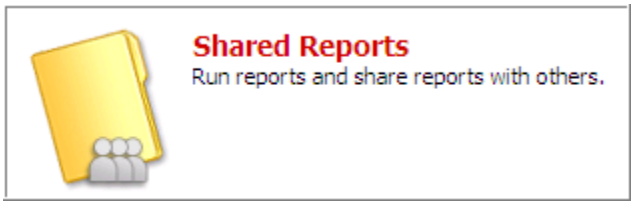
19-2. iREMS Reports Home page

Overview of the iREMS Reports Home page:

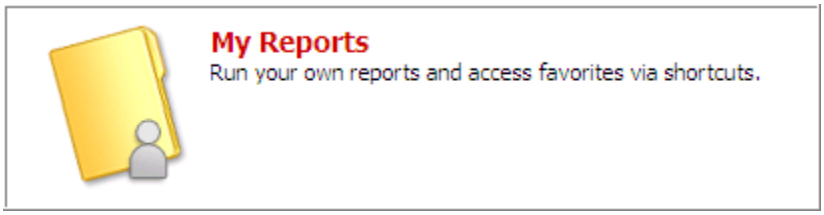
The Reports Home page is used to navigate to specific functions of the reports module. To access the specific functions click on the individual folders or use the toolbar, at the top of the page. Both the folders and the toolbar selections take you to the same page.



19-3. Home Page Toolbar

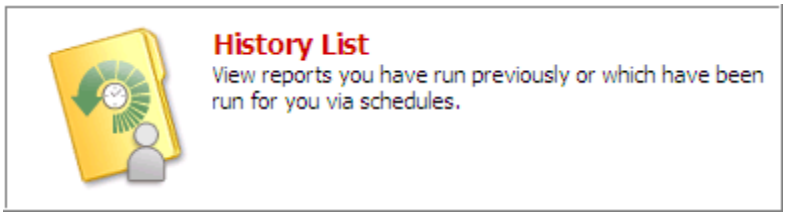


Shared Reports This link navigates the user to the iREMS report category page; used to run reports.

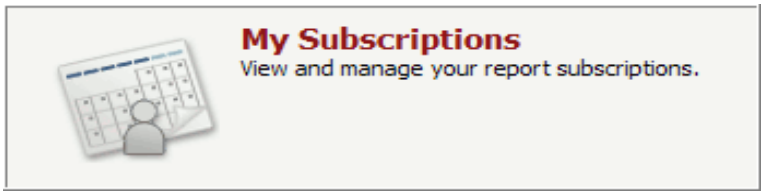


(Future enhancement)

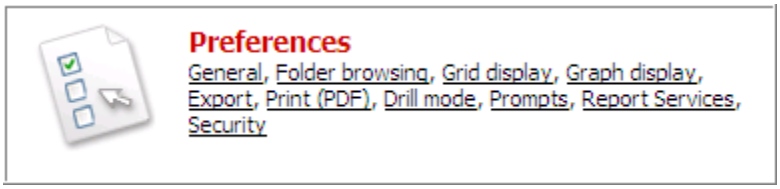
My Reports This link will allow the user to run their own reports and access favorites, via shortcuts.



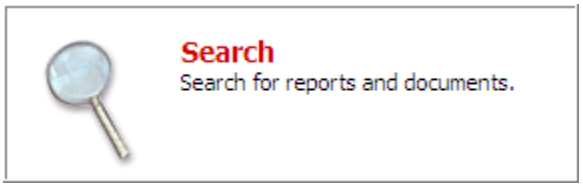
History List This link allows the user to view previously run reports that the user stored in this area.



My Subscriptions This link allows the user to view and manage their report subscriptons.



Preferences This link allows the user to set preferences.





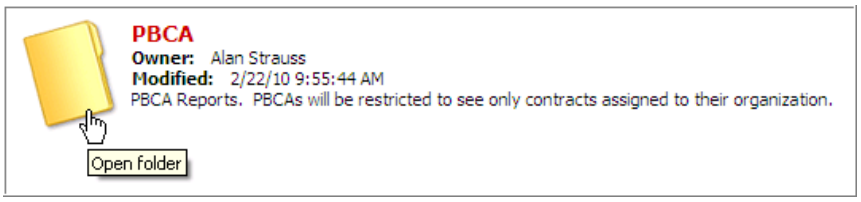
The Search link enables you to modify your report results by searching for certain data.

Help The Help feature is not available in iREMS.

Logout Click on this link to log out of iREMS reports.

19.3 Shared Reports

The **Shared Reports** folder navigates to the **Reports Category** page. The **Reports Category** page contains a folder for PBCA reports. This folder contains a list of the three reports currently available for Pilot PBCA users.



19-4. Shared Reports Category page

19.4 Generating, Saving and Printing Reports

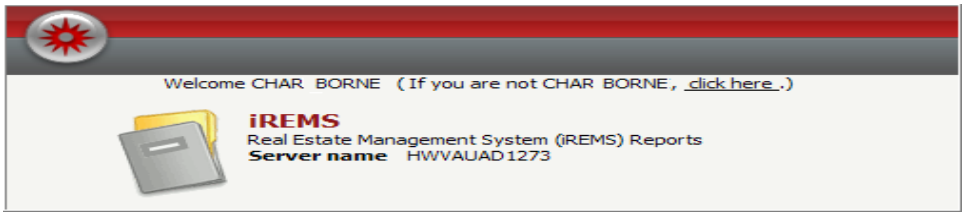
There are two different report formats that can be generated from the Reports module in iREMS. These include the standard Portable Document Format (PDF) report and a Microsoft Excel report (display only). All reports can be generated in either the PDF or the MS Excel formats. .

19.4.1 Reports in Portable Document Format (PDF)

The default format for all reports is PDF. If a report is generated and no format is selected the report displays in PDF. Once the report displays in PDF you can view, print or save the report.

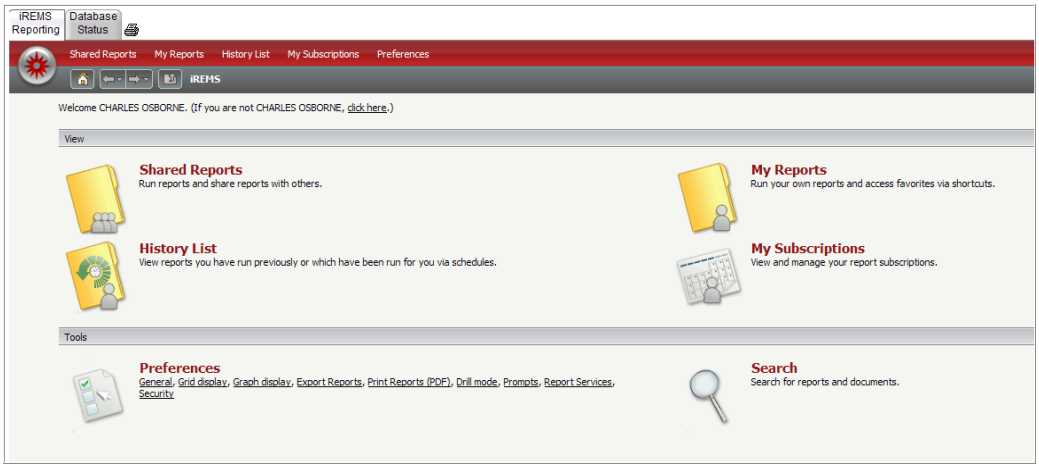
To Generate a Report in PDF format:

1. Log into iREMS
2. Click on the Reports tab and the MicroStrategy Reports Welcome page displays.



19-4. Welcome page

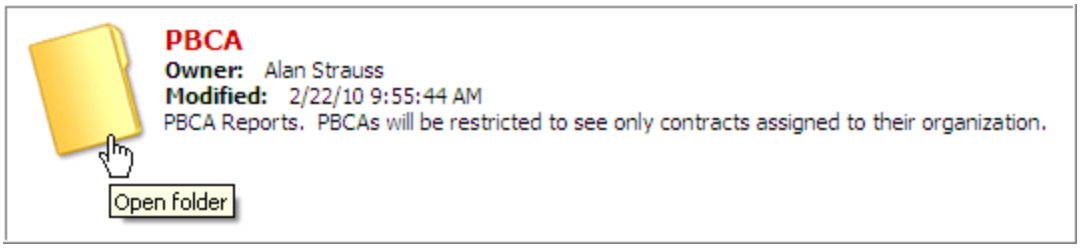
3. Click on the iREMS folder and the Reports Home page displays.



19-5. Reports Home page

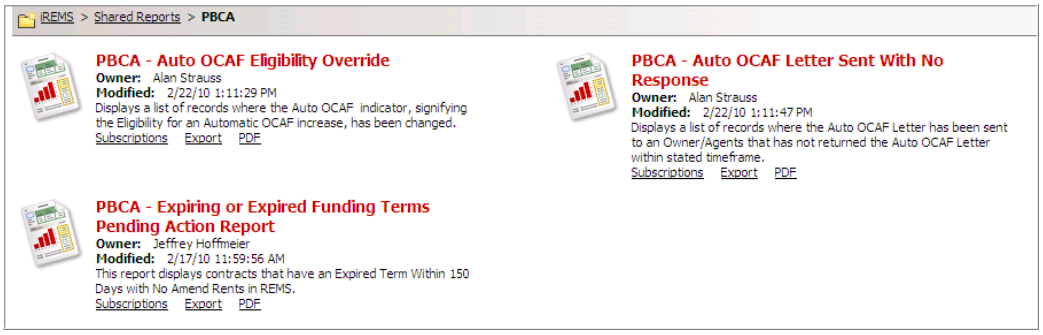


4. Click on the Shared Reports folder and the Reports Category page displays.



19-6. PBCA folder

5. Click on the PBCA folder and the PBCA Report List page displays.



19-7. PBCA Reports List page

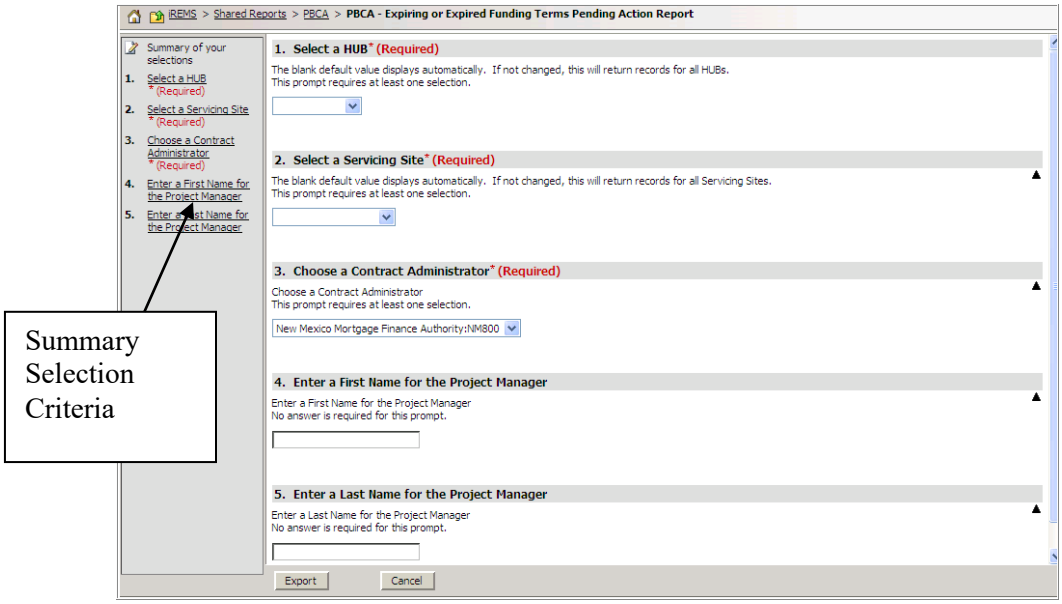
6. Click on the file for the report you want to generate. To generate this file in **PDF** format, either click on the folder or the PDF link.



19-6. Selection for PDF report

In this example, the Expiring or Expired Contracts Pending Action Report is selected.

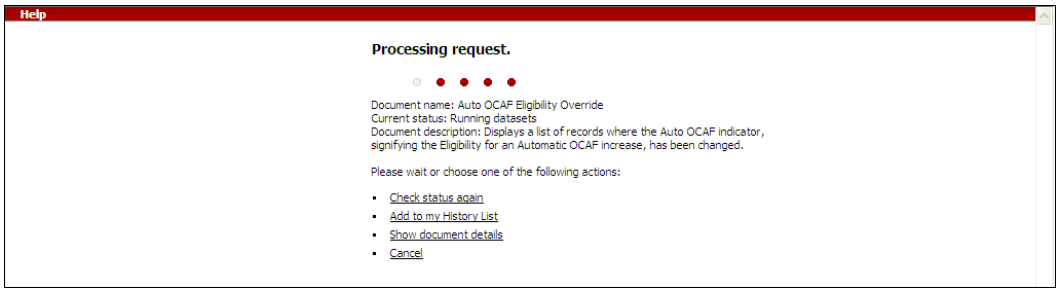
7. The parameters page displays for the selected report. The parameter page identifies the parameters available to obtain the information you need for your report.



19-7. PDF Report parameter page

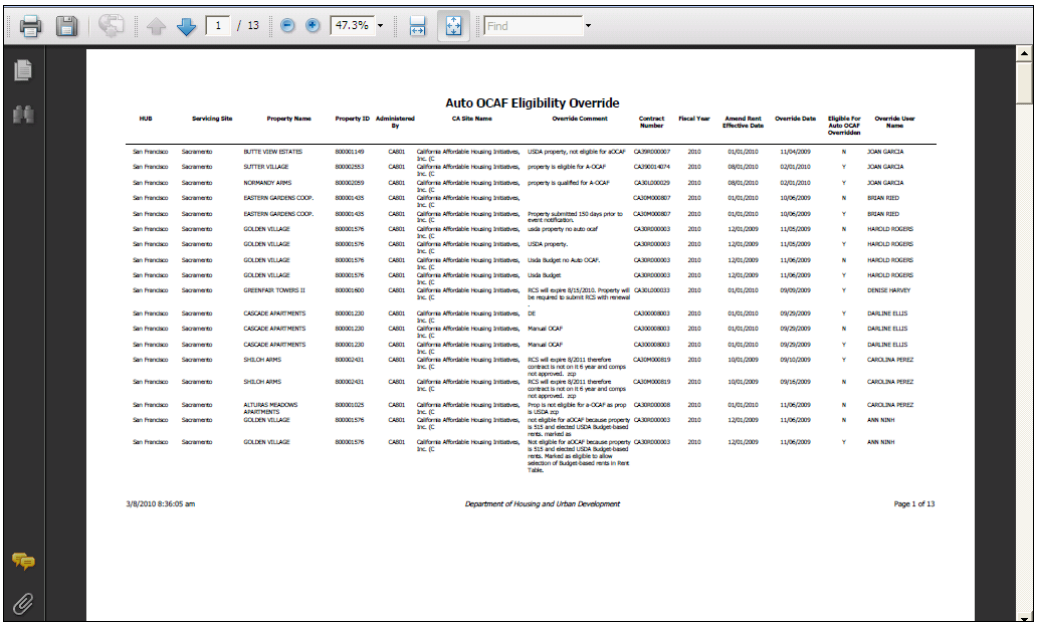
8. Select or enter the criteria that you want included in your report. Remember, the required items must be completed. After you have completed the worksheet, click on Export to generate the PDF report.

9. The Processing Request page displays until the report is generated.



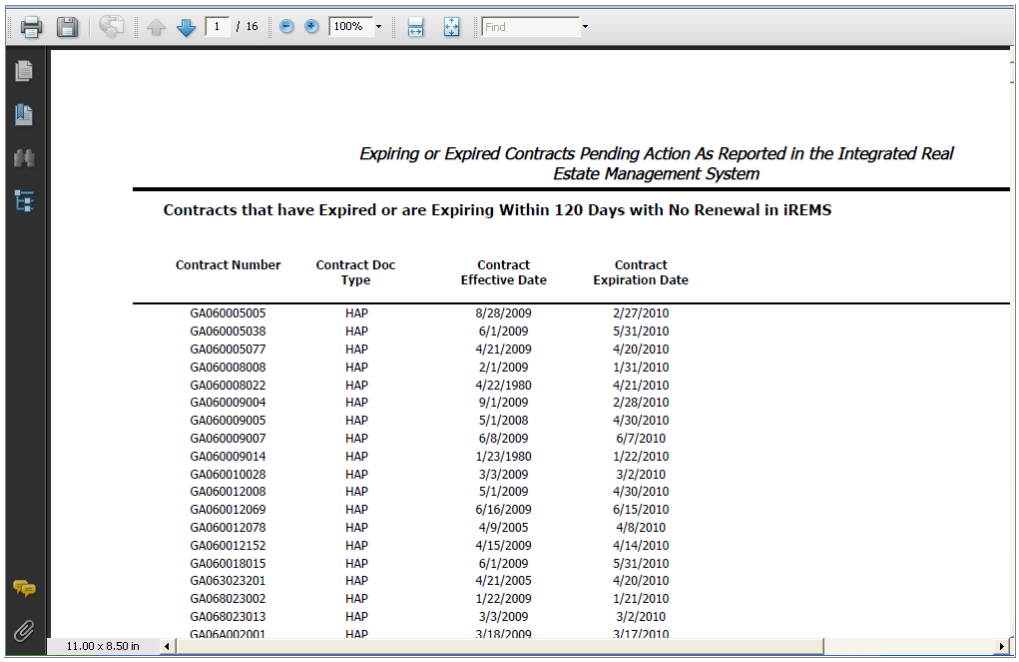
19-8. Processing request

10. The report displays in PDF format.



19-9. Sample PDF Report page

11. The PDF report displays in a reduced size with the sidebar on the left. The sidebar can be used to navigate through the report.



Expiring or Expired Contracts Pending Action As Reported in the Integrated Real Estate Management System

Contracts that have Expired or are Expiring Within 120 Days with No Renewal in iREMS

Contract Number	Contract Doc Type	Contract Effective Date	Contract Expiration Date
GA060005005	HAP	8/28/2009	2/27/2010
GA060005038	HAP	6/1/2009	5/31/2010
GA060005077	HAP	4/21/2009	4/20/2010
GA060008008	HAP	2/1/2009	1/31/2010
GA060008022	HAP	4/22/1980	4/21/2010
GA060009004	HAP	9/1/2009	2/28/2010
GA060009005	HAP	5/1/2008	4/30/2010
GA060009007	HAP	6/8/2009	6/7/2010
GA060009014	HAP	1/23/1980	1/22/2010
GA060010028	HAP	3/3/2009	3/2/2010
GA060012008	HAP	5/1/2009	4/30/2010
GA060012069	HAP	6/16/2009	6/15/2010
GA060012078	HAP	4/9/2005	4/8/2010
GA060012152	HAP	4/15/2009	4/14/2010
GA060018015	HAP	6/1/2009	5/31/2010
GA063023201	HAP	4/21/2005	4/20/2010
GA068023002	HAP	1/22/2009	1/21/2010
GA068023013	HAP	3/3/2009	3/2/2010
GA06A002001	HAP	3/18/2009	3/17/2010

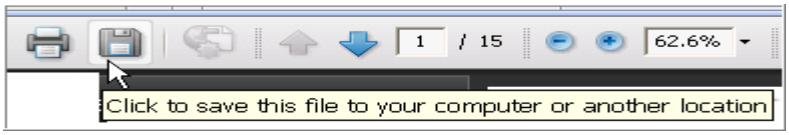
19-10. Sample PDF Report page- expanded to 100%

12. Use the top toolbar to print, save or resize the display.

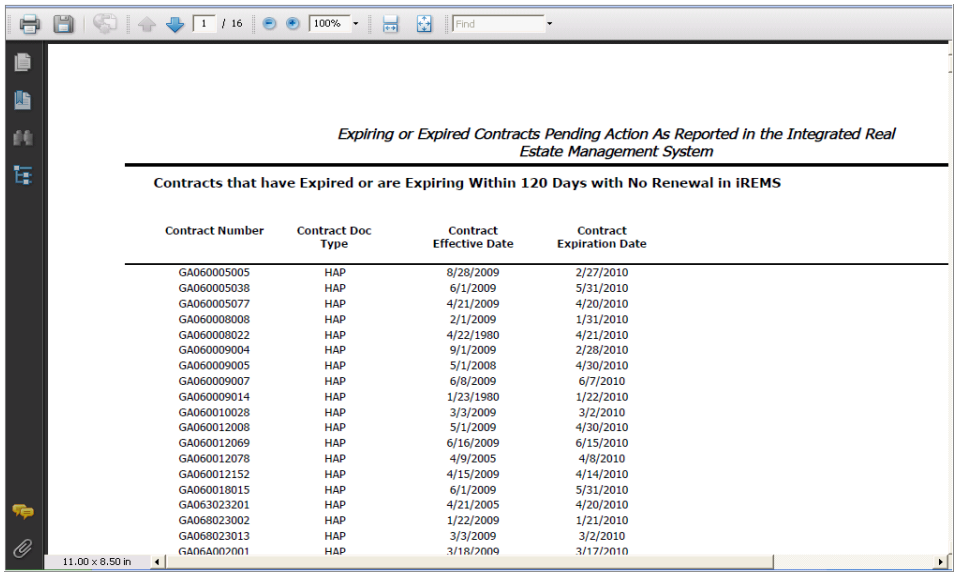
To Save a PDF Report:

Once you have generated a PDF report and it displays, you can save the report.

1. Click  on the toolbar, at the top of the report.

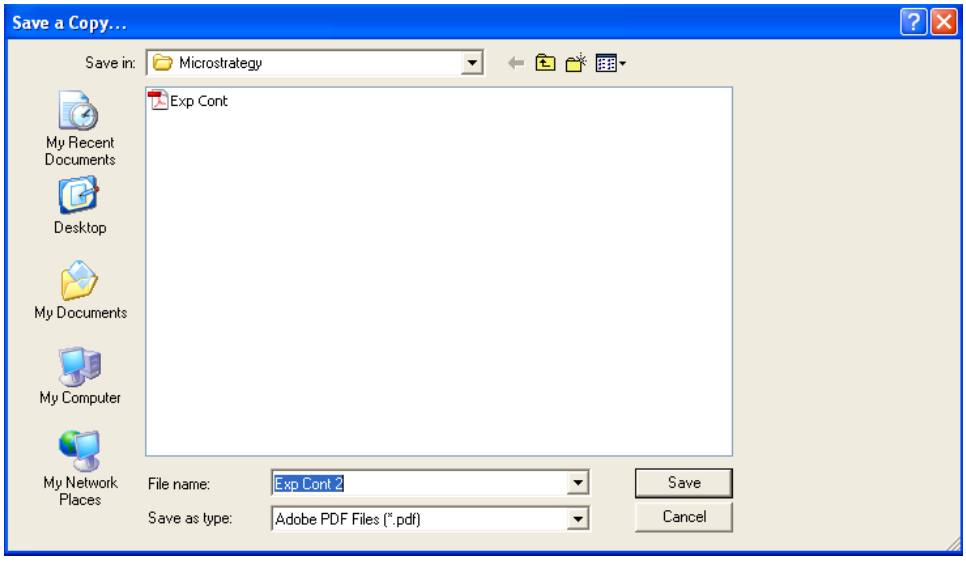


19-8. Toolbar at the top of the report



19-9. Sample Report in PDF

2. The *Save a Copy* window displays.

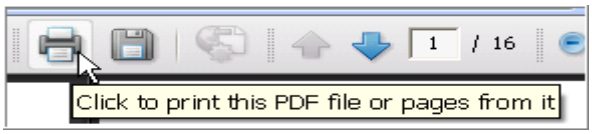


19-10. The Save a Copy page

3. Select the folder where you want to save the report.
4. Enter a File name.
5. Click on Save and the report is saved in the folder you identified.

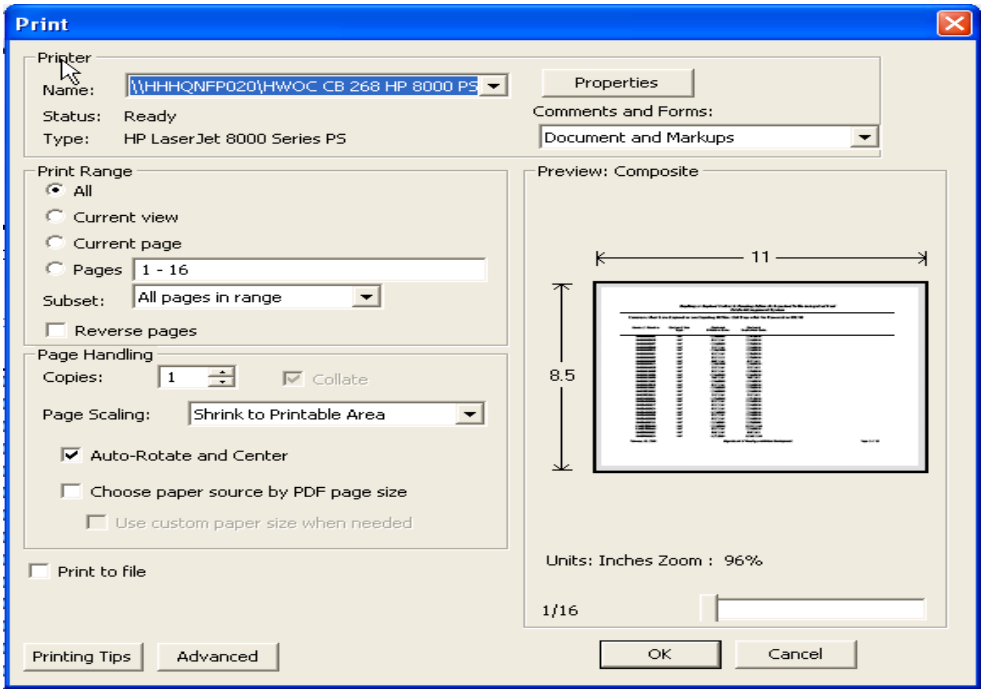
To Print a PDF Report:

1. Click  on the toolbar, at the top of the report



19-11. Toolbar

2. The Print page displays.



19-12. Print page

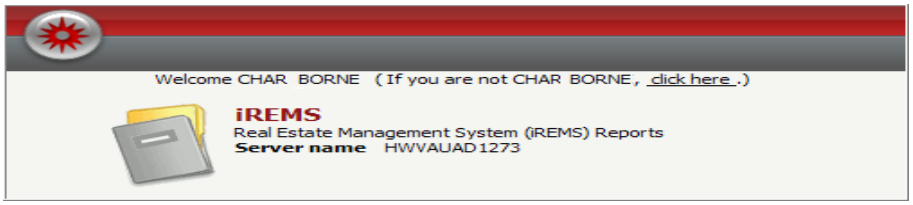
3. Check the printer details. If they match your printing requirements, click on OK.
4. The report prints to the designated printer.

19.4.2 Reports in MS Excel Format

The default format for all reports is PDF. If a report is generated and no format is selected the report displays in PDF. You must select the *Export* link on the Report List page to generate an MS Excel report. Once the report displays in MS Excel, you can view, print or save the report.

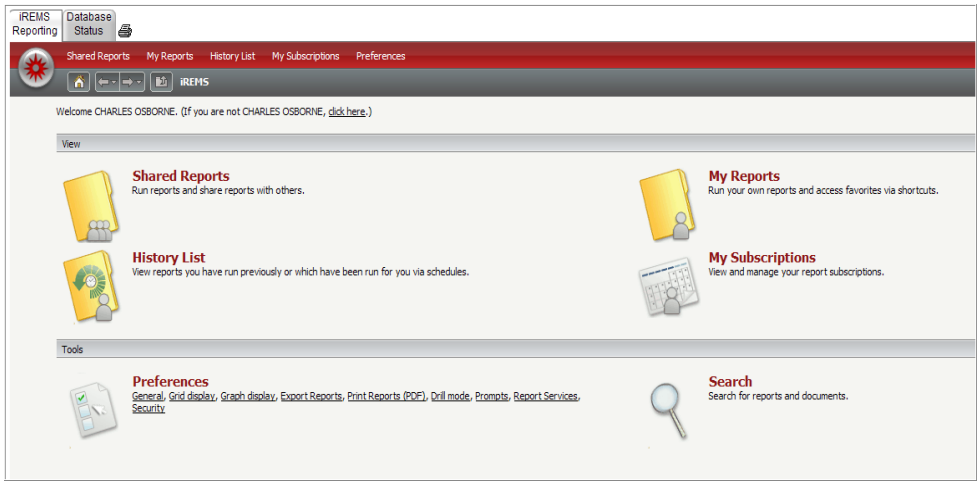
To export a report in MS Excel:

1. Log into iREMS
2. Click on the Reports tab and the MicroStrategy reports Welcome page displays.



19-13. Welcome page

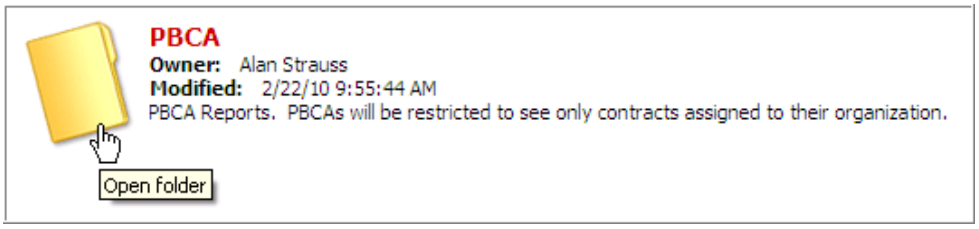
3. Click on the iREMS folder and the Reports Home page displays.



19-14**. Reports Home page**

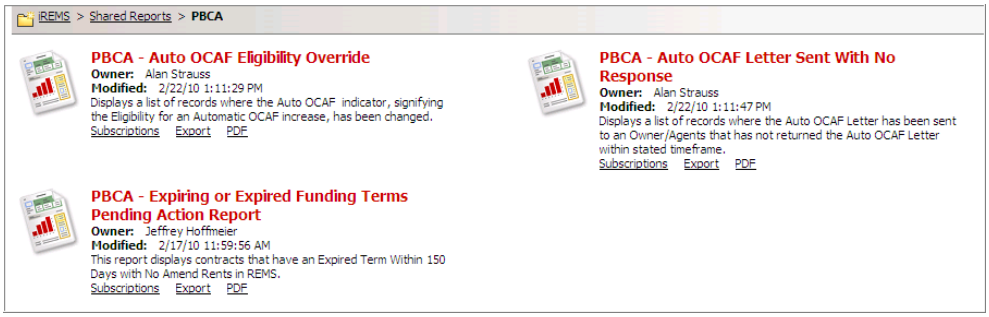


4. Click on the Shared Reports folder and the Reports Category page displays.



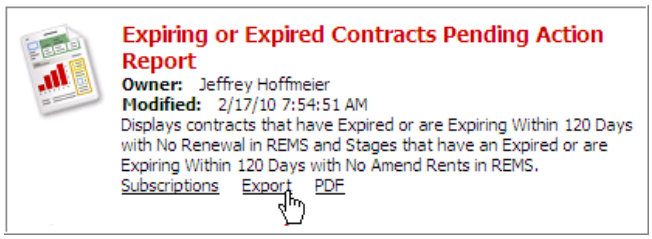
19-15. Shared Reports page

5. Click on the PBCA folder and a list of PBCA reports displays.



19-16. PBCA Reports page

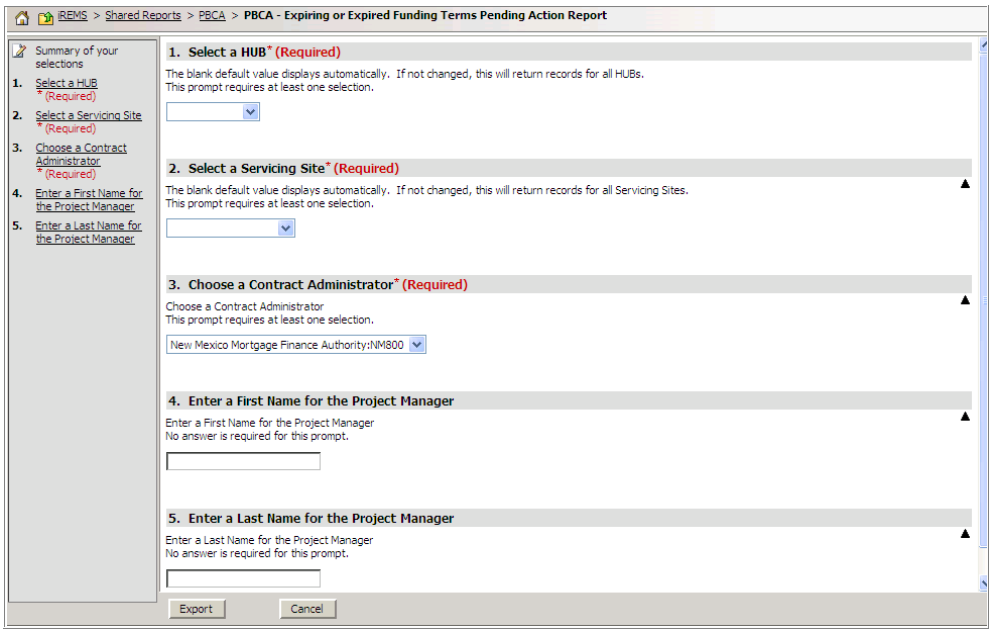
6. Select the report and click on the Export link under the report name.



19-11. Selection for MS Excel format

In this example, the Expiring or Expired Contracts Pending Action Report is selection.

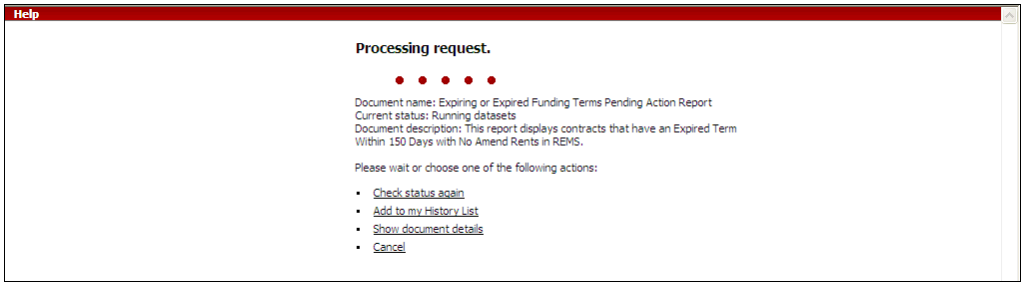
7. The parameters page displays for the selected report. This page identifies the parameters available to obtain the information you need for your report.



19-12. Excel Report parameter page

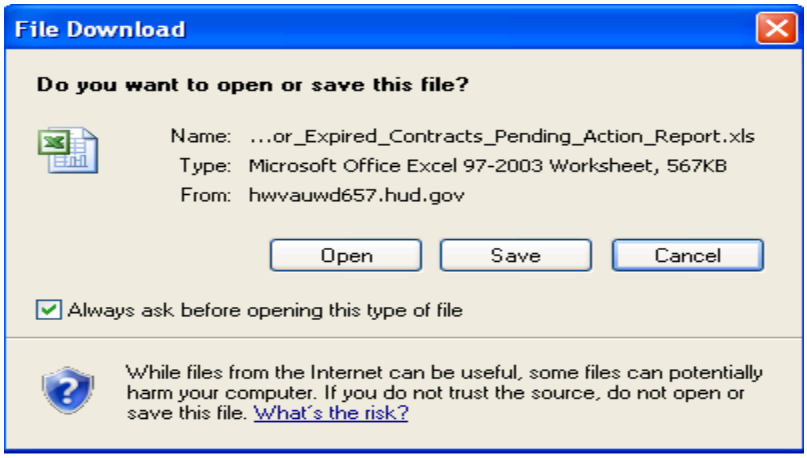
8. Select or enter the criteria that you want included in your report. Remember, the required items must be completed. After you have completed the worksheet, click on Export to generate the **MS Excel** report.

9. The Processing Request page displays while the report is generating.



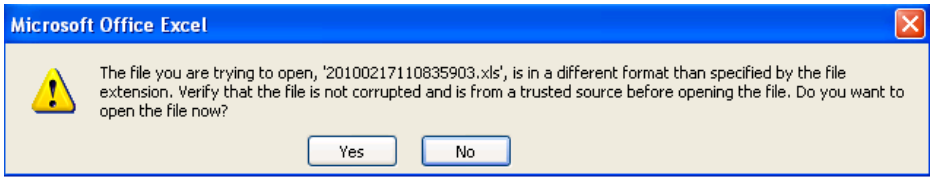
19-13. Processing request message

10. Once the report has been generated the File Download page displays.



19-14. File Download box for Excel format

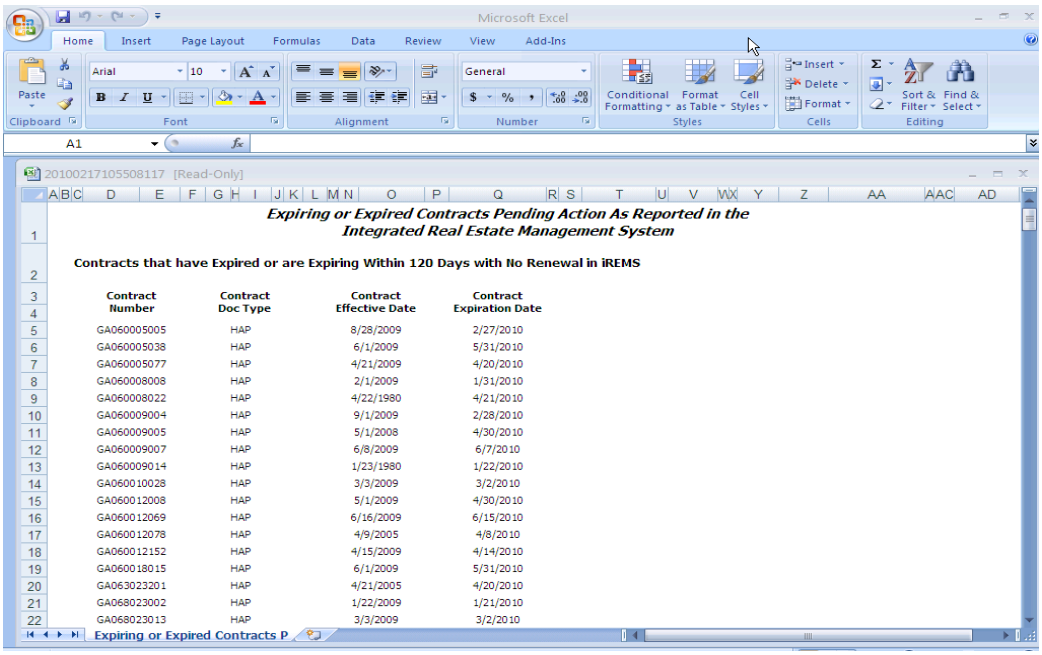
11. Click on Open to access the Excel report. The Microsoft Office Excel window displays.



19-15. MS Office Excel window

12. Click on 

to display the MS Excel report in a display only format.



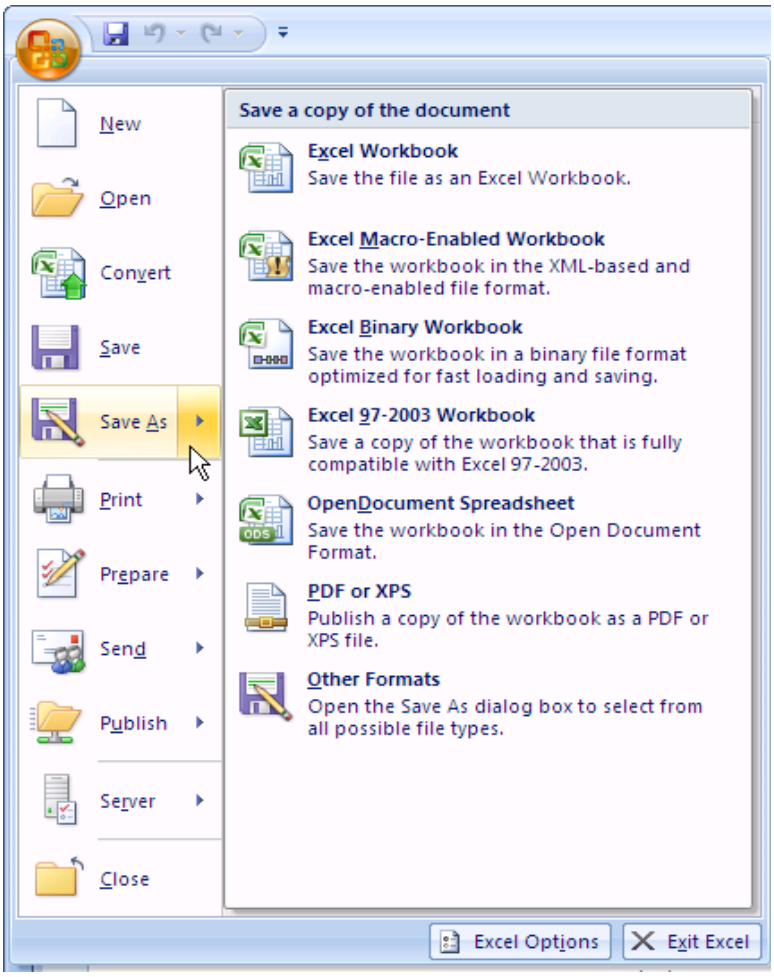
19-16. MS Excel Report

13. You have access to the Excel Report features on the toolbars at the top of the MS Excel page.

To Save MS Excel reports:

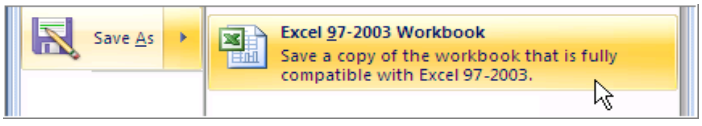
Once the Excel report is generated and displayed, you can save the report.

1. Click on  at the top, left corner of the report toolbar.
2. The file options bar displays.



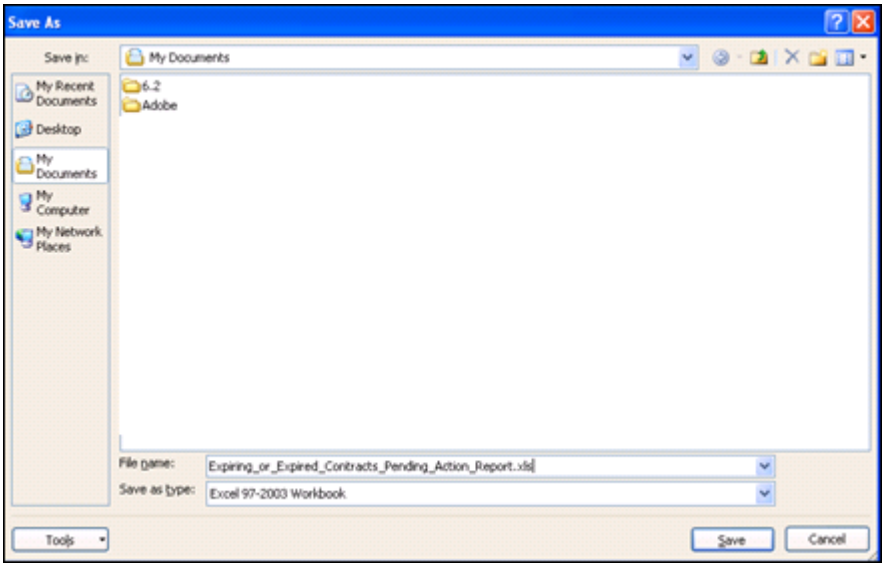
19-17. Save options page

3. Select *Save As* to determine where and how to save the report.



19-18. Save As selection

4. Select Excel 97-2003 workbook to save. The Save As window displays.

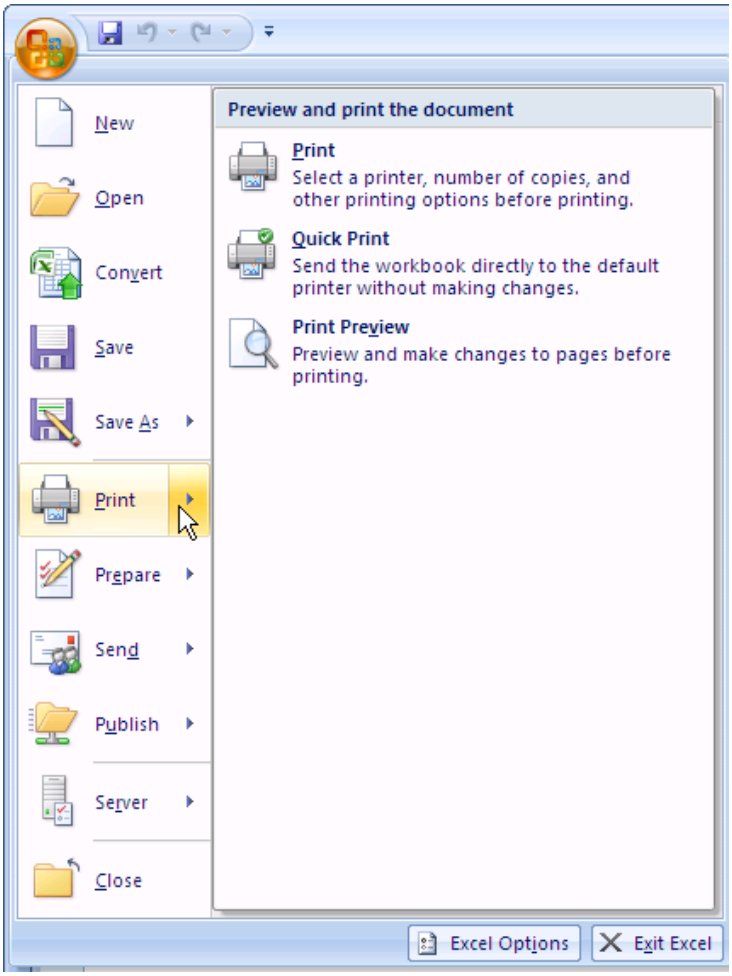


19-19. Save As page

5. Select the location and enter a file name to store the report.
6. Click on Save and the report is saved in the designated location.

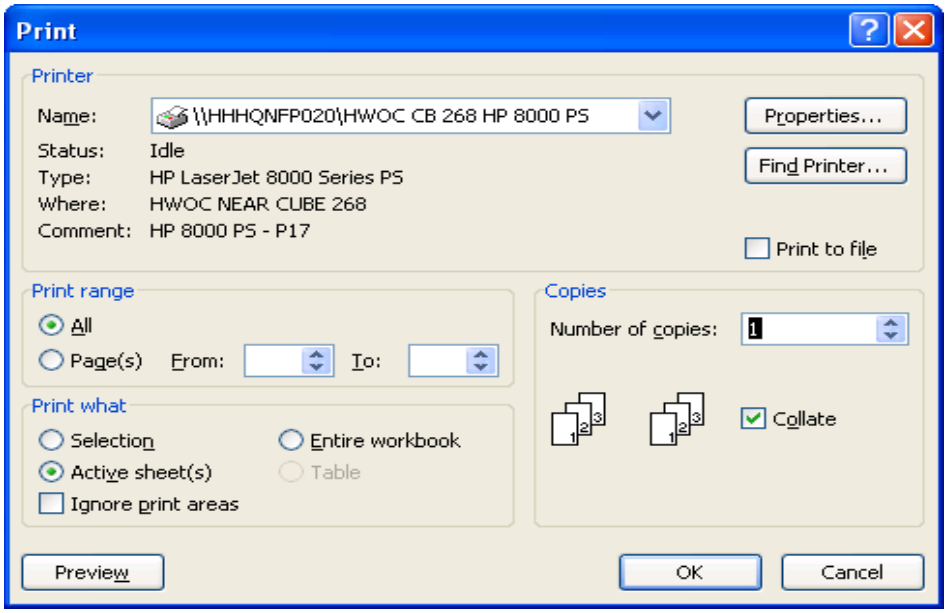
To print a MS Excel Report:

1. Click on  at the top, left corner, of the of the report toolbar.
2. The file options bar displays.



19-20. File Options page

3. Select *Print* on the sidebar and the *Print* option at the top of the list of options. The Print box displays.



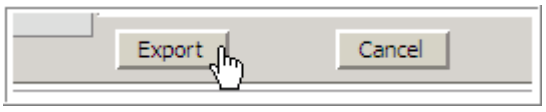
19-21. Print page

4. Check the printer details. If they match your printing requirements, click on OK.
5. The report prints to the designated printer.

19.5 Report Parameters

The PBCA Reports List page contains three reports currently available for Pilot PBCAs. When a specific report title is selected, a report parameter page displays. The parameters include data that is required and data that can be selected to personalize the report to the user's specifications.

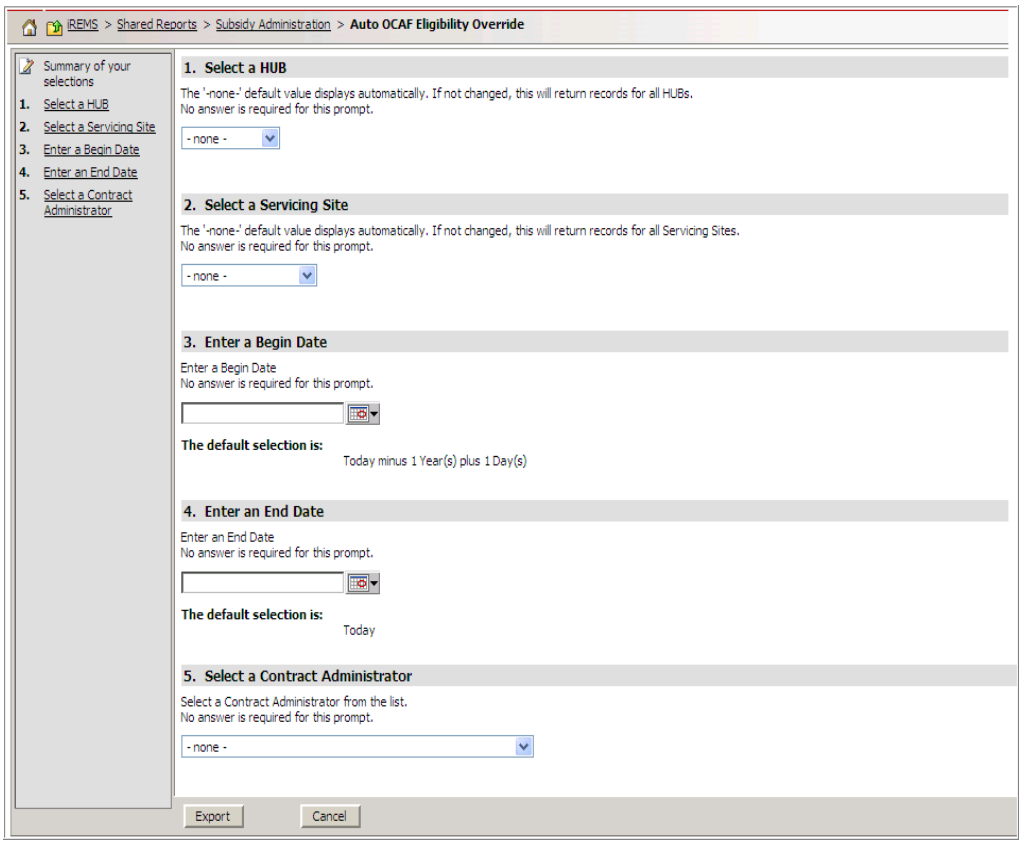
The parameters on the Parameter page for all types of reports are the same. The parameter page for the PDF format and the MS Excel display only format are generated by selecting the *Export* button at the bottom of the page.



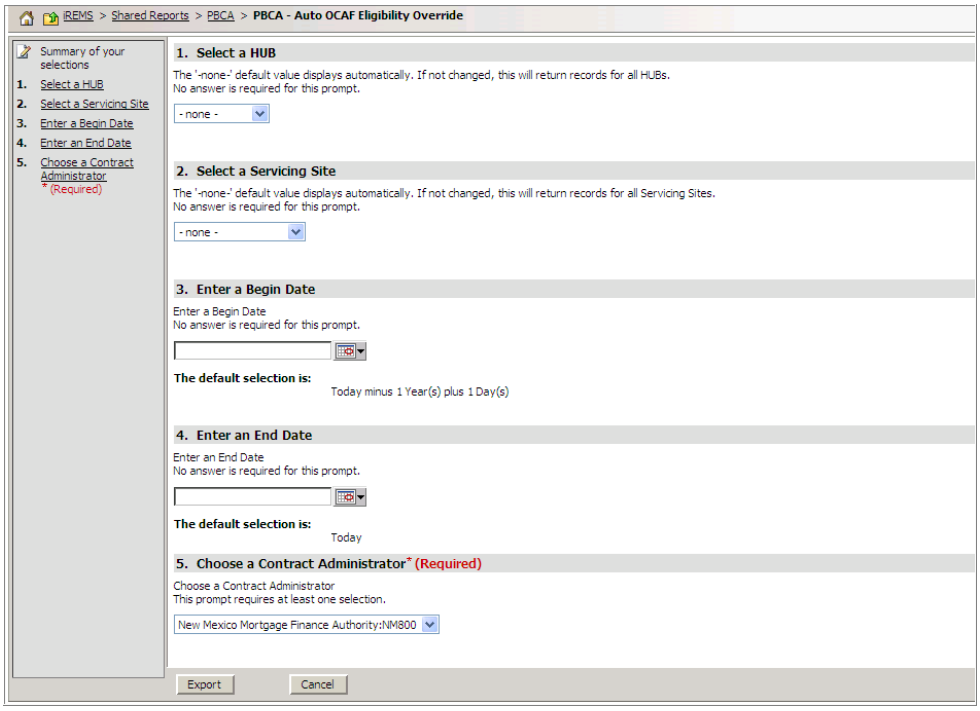
19-22. Export button

The Parameter page contains the same format and parameter requests. Each page displays a list of the parameters in a left side column and an entry screen to enter your report requirements. There are items on most Parameter pages that are required to generate the report. These items are identified with the word

"required" on the main page and in the side column. The first parameter page below has no *required* fields, the second page has two *required* fields. In some cases the word *required* means that the system needs the information to generate the report but does not require the user to change the information displayed.

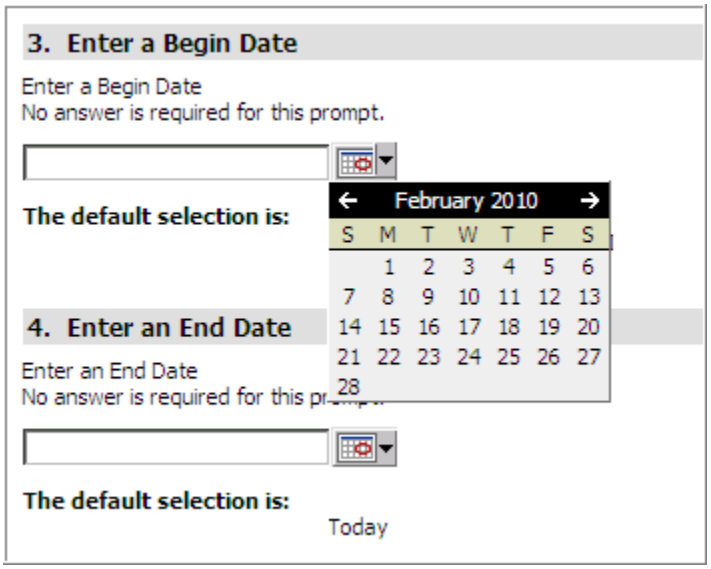


19-23. Parameter page



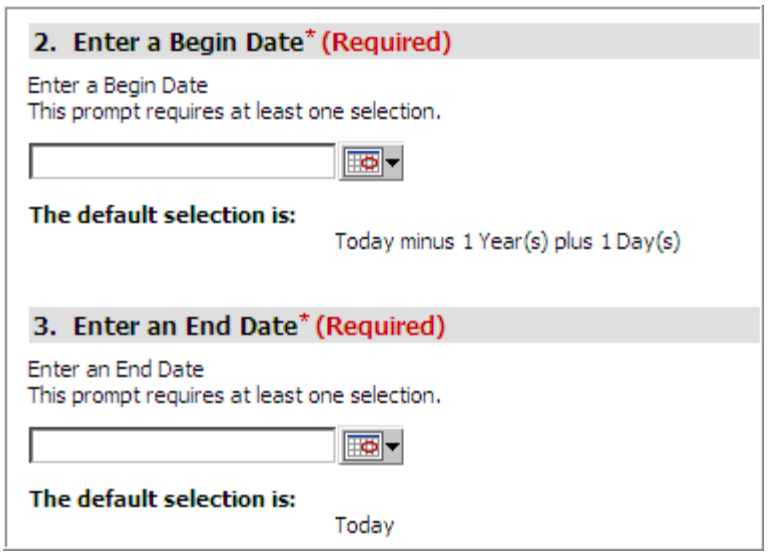
19-24. Example of MS Excel format

Date worksheet items use a pop up calendar for input.



19-25. Date calendar example

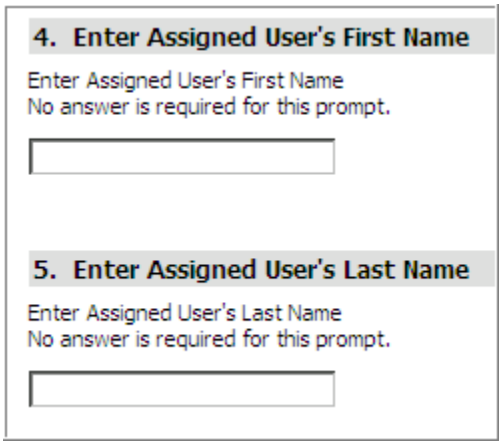
In the next example the date is a required field. If you click on the calendar, the pop up calendar displays as it did in the picture above and you can select the dates. However, since this is a required field, if you do not make a selection iREMS will use the default. The default in this field is 365 days or today minus 1 year plus 1 day.



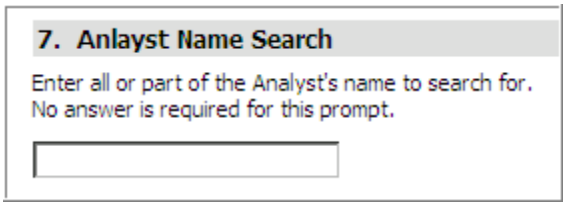
19-26. Date parameter with required data

There are several fields on the parameter pages that are for names. Some of these fields are required and others are not. The name requests will have specific instructions on what is needed for the search.

Below are two examples of a name search.



19-27. Search on User's Name

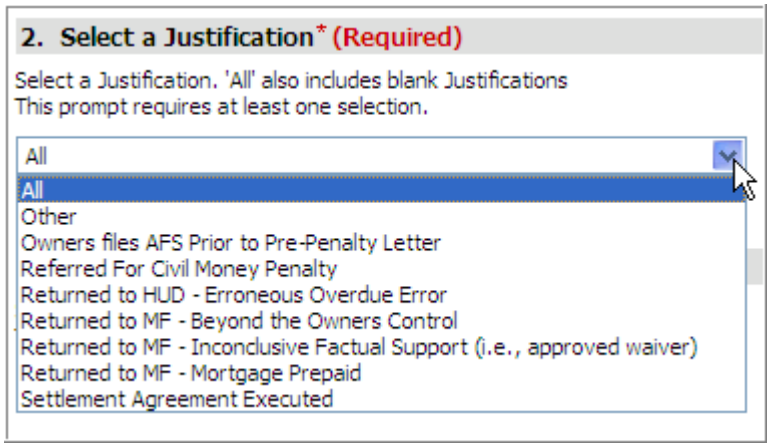


19-28. Name search

Multiple source items are either displayed as an on-screen list or as a drop-down list of items.

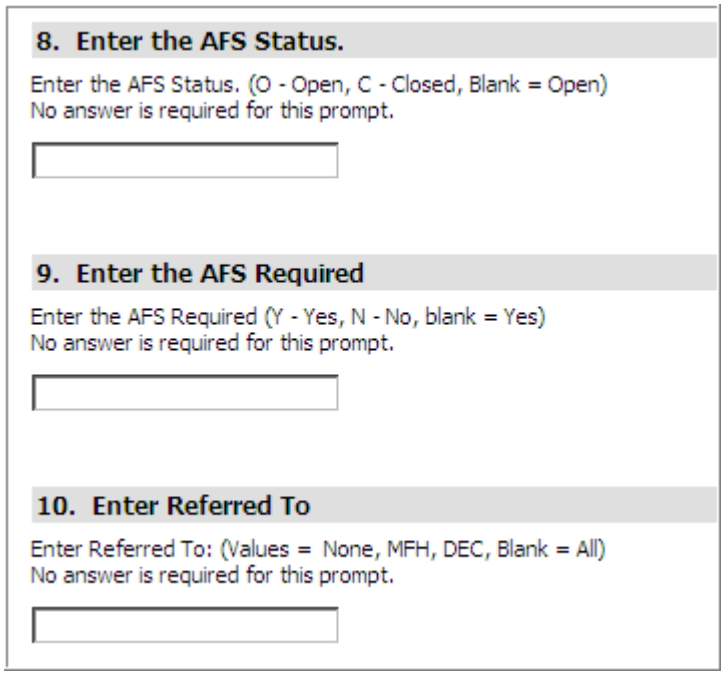


19-29. On screen list



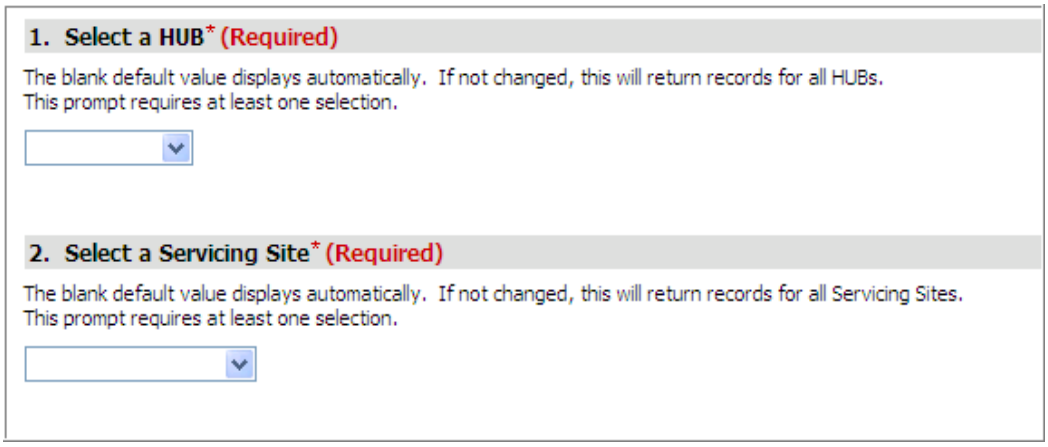
19-30. Drop-down list

Blank fields may have various indications. The worksheet below identifies the definition of the 3 blank fields displayed.

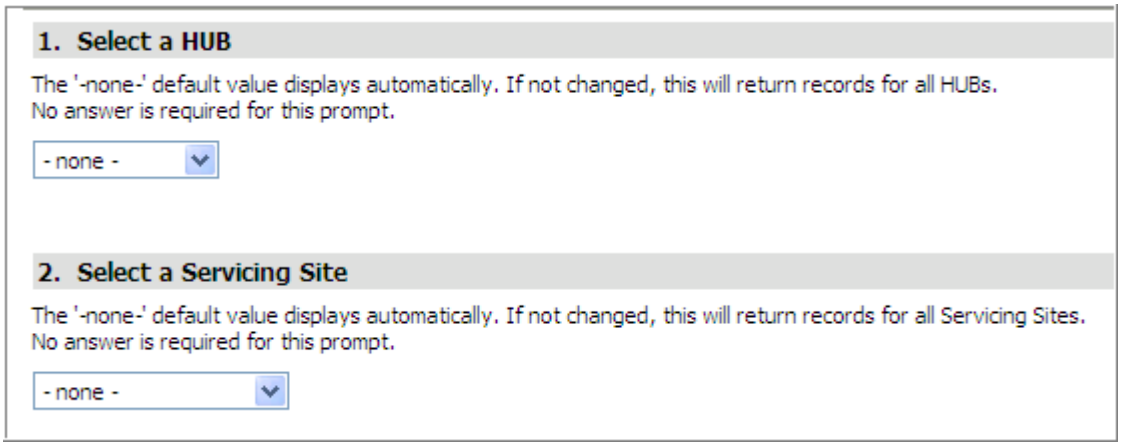


19-31. Example of Blank with definitions

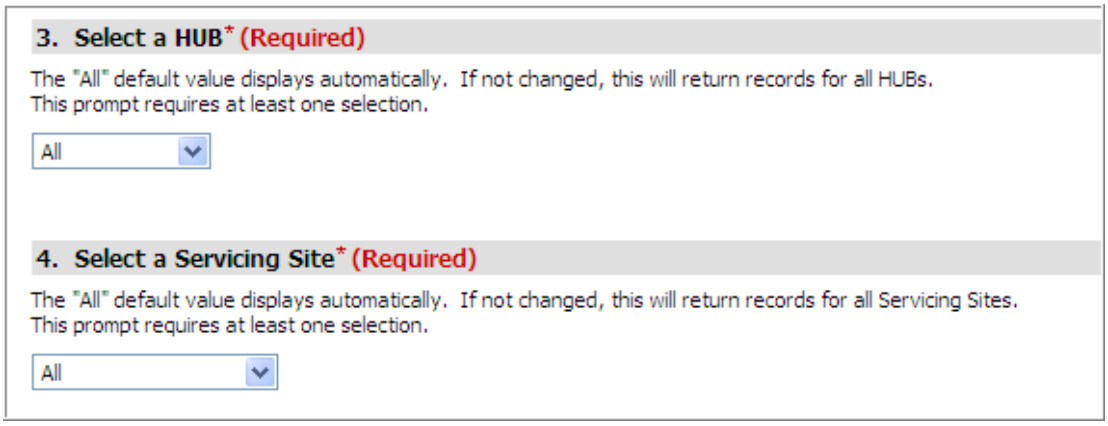
The *blank* field has a distinctive definition when requesting a HUB or Servicing Site. The *none* or *All* fillers also have defined meaning for HUB or Servicing Site requests. These examples are explained on the parameter page.



19-32. Blank for HUB and Servicing Site

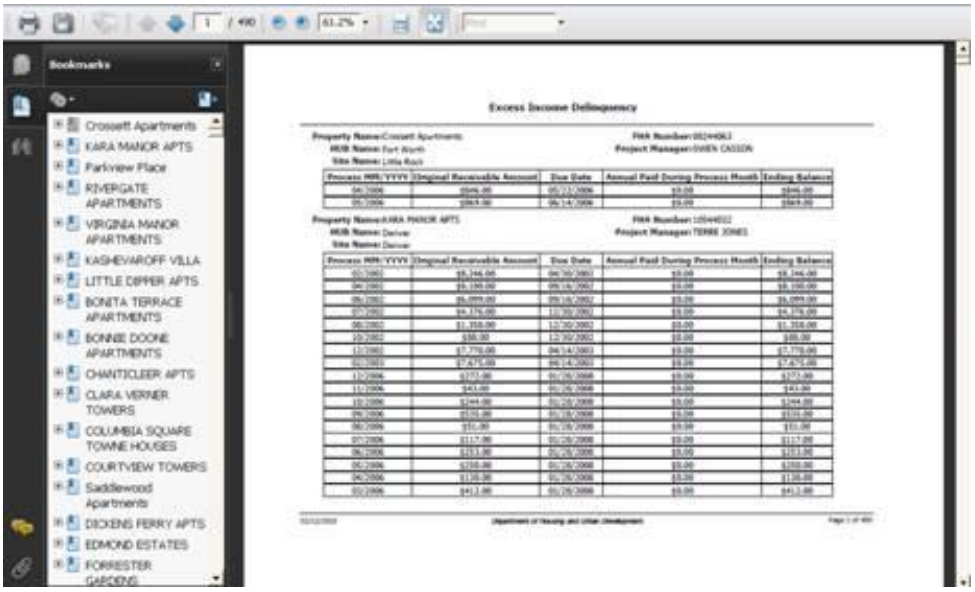


19-33. None for HUB and Servicing Site



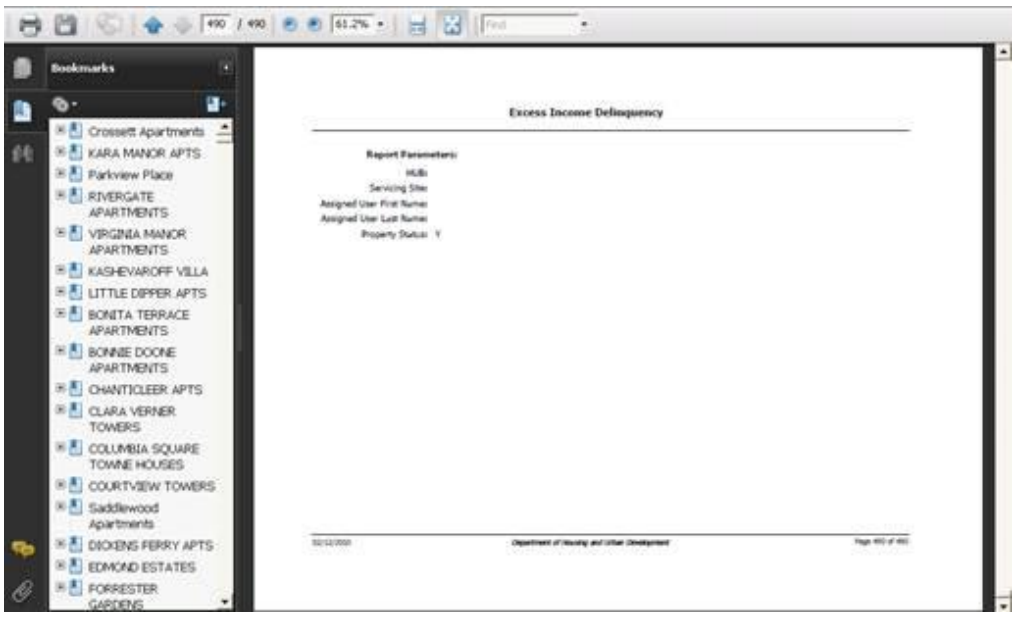
19-34. All for HUB and Servicing Site

In the three examples above, the default values of "All", "-none-" and blank, do not require a change and will return a report with "ALL". For example, if the default is used in the HUB field, the report will display all HUBs for each of these default values. This may cause the report to be rather large. In the example below, the report generated is 400 pages.



19-35. Sample Report

The Export parameter page at the end of the report displays all of the parameters selected when generating the report. If no parameter was selected in a required field and 'All' or 'none' or Blank was used, the parameter displays blank on this page indicating that a selection limiting this search was not made and the report includes "All". In the example below, the only parameter selected was the property status. Therefore, the report generated includes all HUBs, all Servicing Sites, and all user names.



19-36. Sample Parameter Summary page

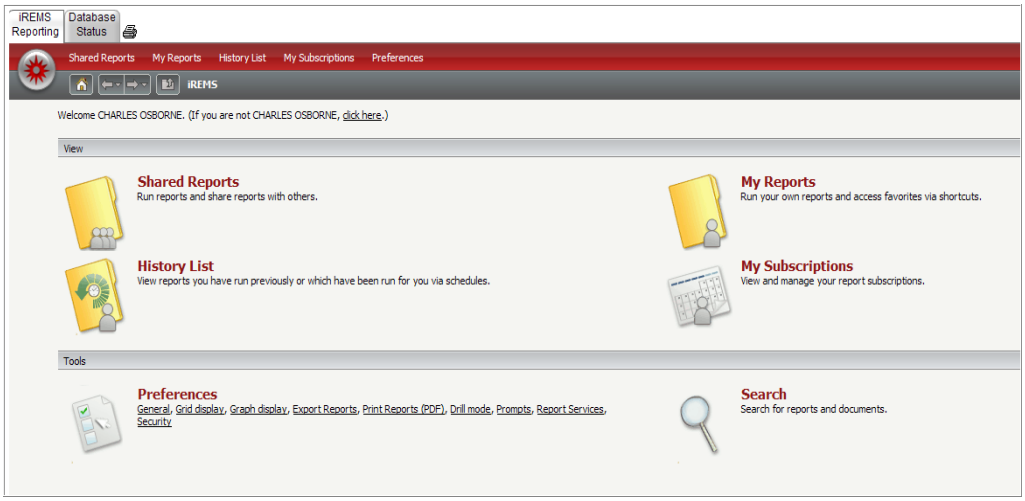
19.6 History List

Once a report has been generated it is advisable to save the report to your desktop. Any report that has already been generated and saved to the History List can be accessed via the link from the My History folder. Reports saved in the My History folder will remain there temporarily and will be automatically deleted after a certain amount of time, with no warning. Therefore, it is always advisable to save your generated reports to your desktop or local drive.

Reports are saved in the My History folder as unchanging files. Therefore if you wish to see the most current data on a report that you have not run in the past 24 hours, generate a new report. If current data is not essential, or if a night has not passed since the last time you ran the report, you can view a previously generated version.

To save Reports in the History List:

1. From the Welcome page, click on the iREMS folder and the Reports Home page displays.



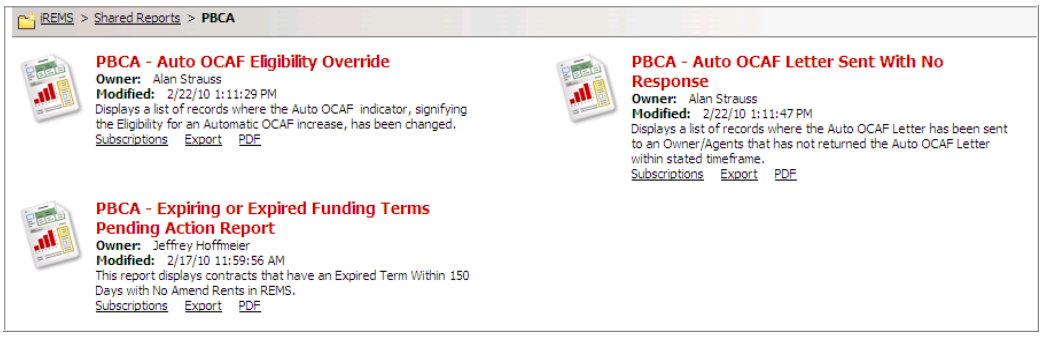
19-37. **Reports Home page**

2. Click on Shared Reports and the Shared Reports page displays.



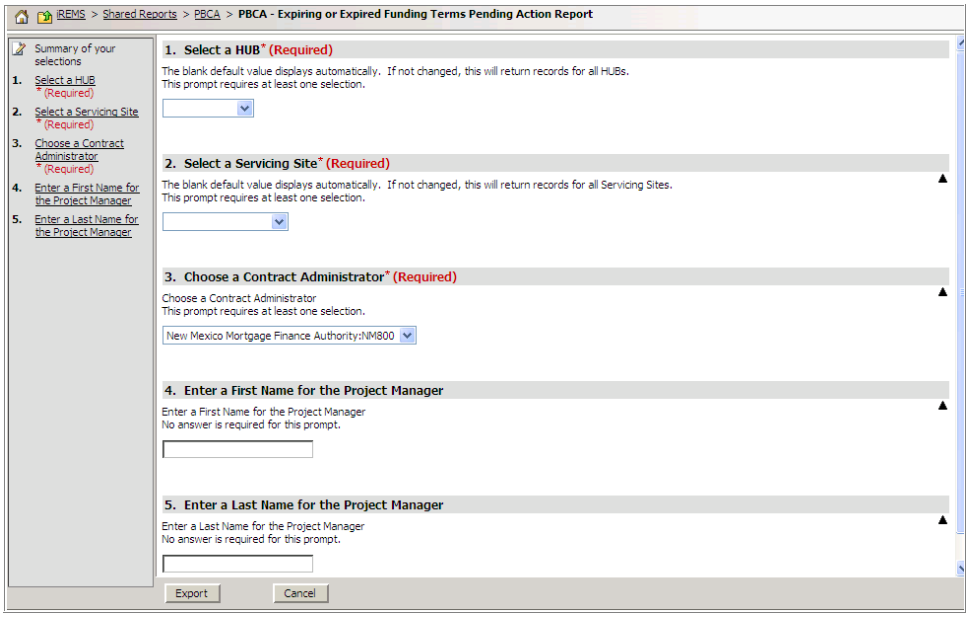
19-38. PBCA folder

3. Click on the PBCA folder and the PBCA Reports List page displays.



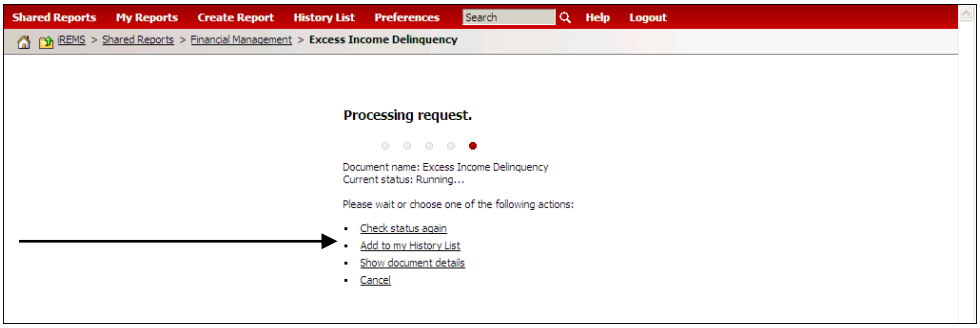
19-39. PBCA Reports page

4. Click on the report name and the Parameters page displays.



19-40. Parameters page

5. Enter the appropriate parameters and click on Export. The Processing page displays until the report is generated.

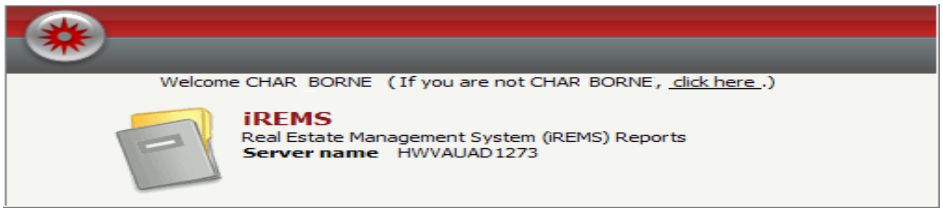


19-41. Processing/Status page

6. Click on the Add to my History List link and the report is added to your History List page.

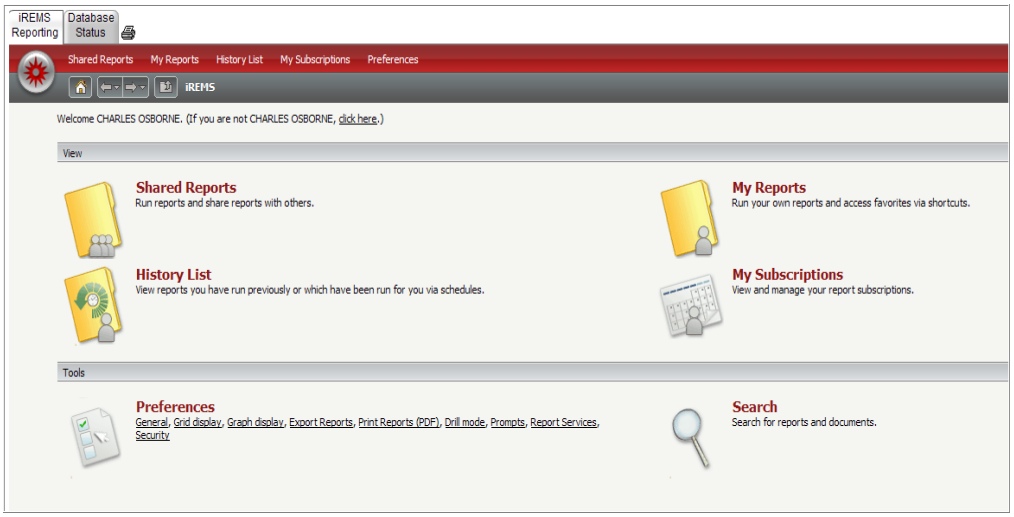
To access the History List page:

1. Click on the Reports tab from anywhere in iREMS to access the reports. The Welcome page displays.



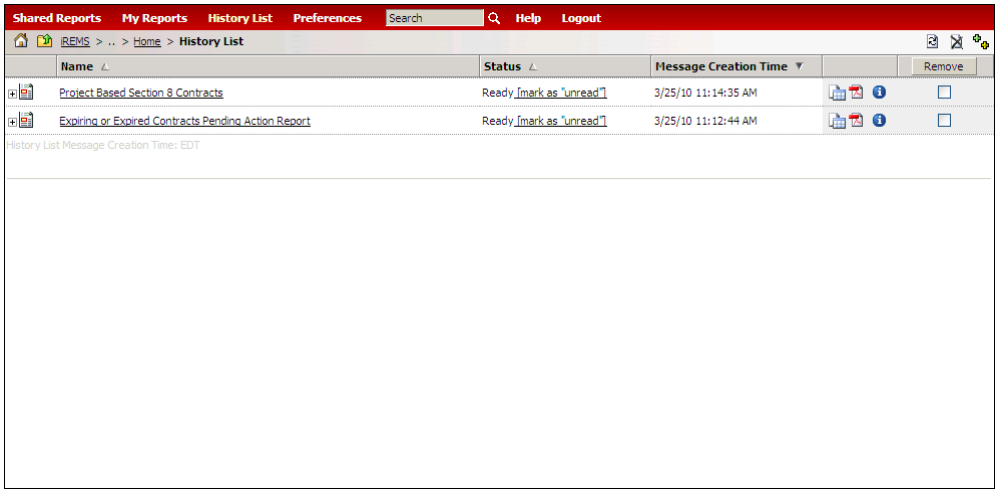
19-42. iREMS report Welcome page

2. Click on the iREMS reports folder and the Reports Home page displays.



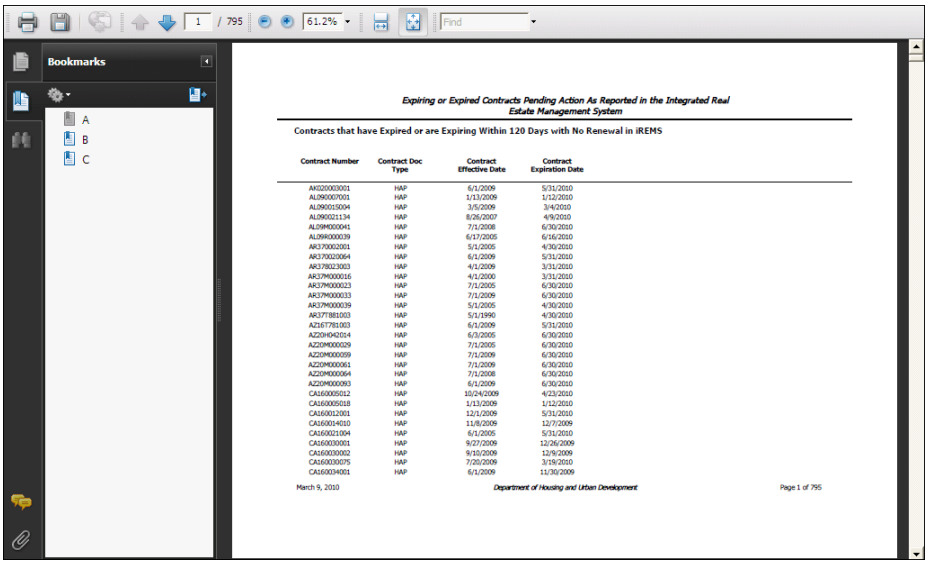
19-43**. Reports Home page**

3. Click on the History List Link and the History List page displays.



19-44. History List page

4. Click on the report name and the previously run report displays.



19-45. Expiring or Expired Contracts Pending page

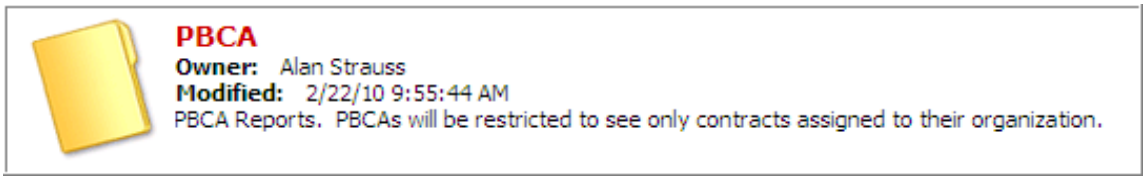
19.7 Report Names and Parameters

PBCA reports and associated selection criteria are outlined in Section 19.7.1. Reports are generated from the **Standard Reports** page. A general selection criteria page allows you to enter specific data that sets

the parameters for your report. The general selection criteria page is usually titled after the report and displays all general criteria and any criteria that are specific to the requested report.

19.7.1 Reports and Parameters

All reports have selection criteria. In this section is a list of all report categories, the associated reports and the individual report parameters.



Report Name	Selection Parameters
PBCA - Auto OCAF Eligibility Override	HUB Servicing Site Begin Date End Date Contract Administrator (required)
PBCA – Auto OCAF Letter Sent With No Response	HUB Servicing Site Begin Date End Date Contract Administrator (required)
PBCA – Expiring or Expired Funding Terms Pending Action Report	HUB (required) Servicing Site (required) Contract Administrator (required) First Name for Project Manager Last Name for Project Manager