

Chapter 19: Reports

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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

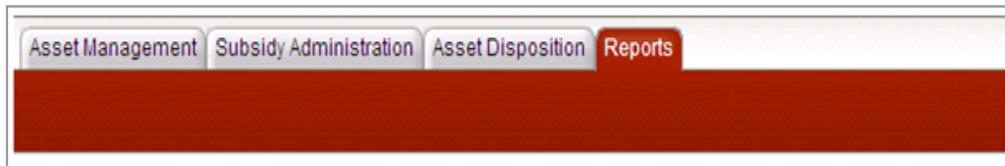
MicroStrategy, a powerful reporting tool is used to generate reports for Multifamily Housing (Housing), Departmental Enforcement Center (DEC), and Contract Administration Oversight Monitors (CAOM) and

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.

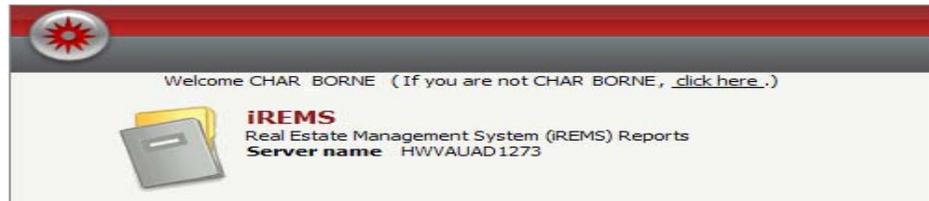
19.2 The Reports Module

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



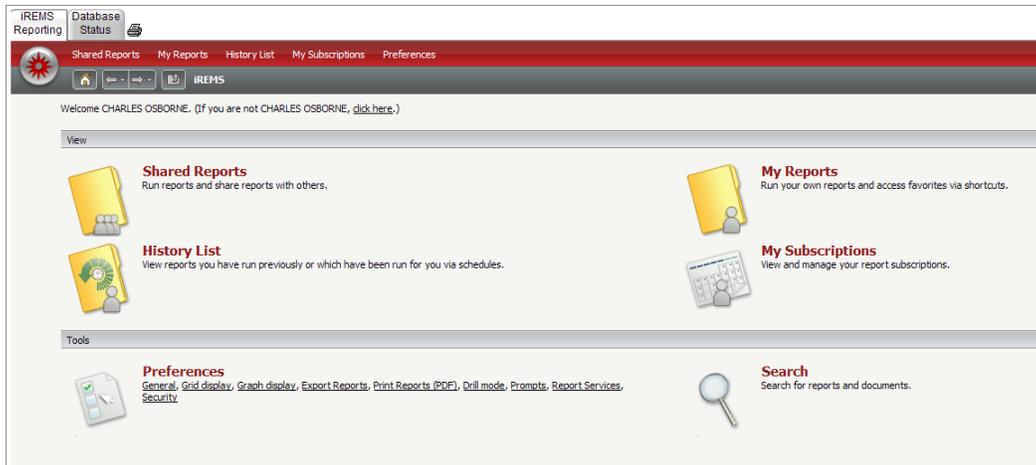
To access Report Module:

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.

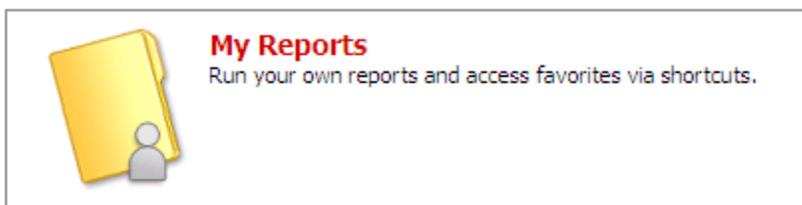


19-3. Home Page Toolbar



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

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



My Subscriptions
View and manage your report subscriptions.

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



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

Preferences This link allows the user to set preferences.



Search
Search for reports and documents.

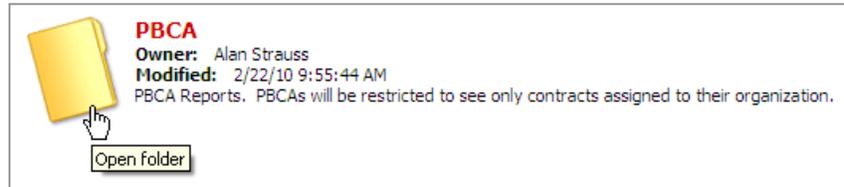
 The Search link enables you to modify your report results by searching for certain data.

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

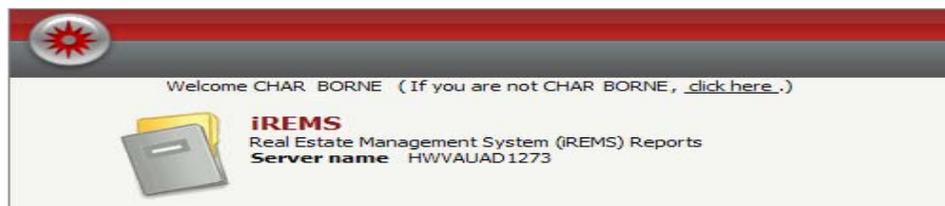
There are two different report formats that can be generated from the Reports module in iREMS. These include the standard Portable Document Format (PDF) report and a Microsoft Excel report (display only). All reports can be generated in either the PDF or the MS Excel formats. .

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.

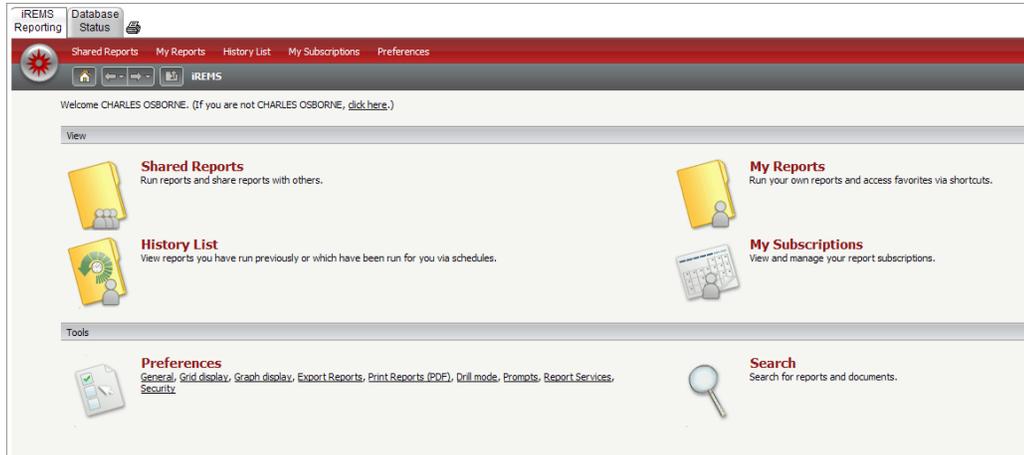
To Generate a Report in PDF format:

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



19-4. Welcome page

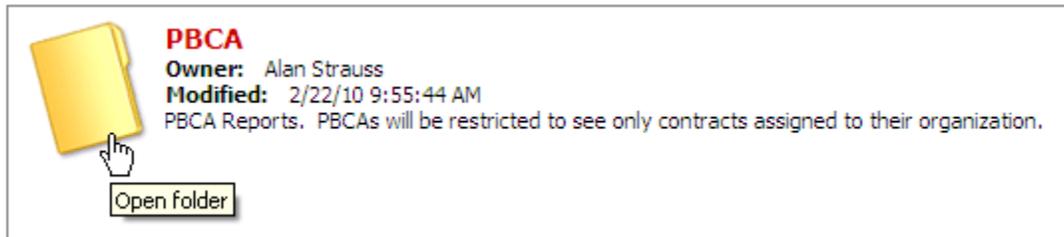
3. Click on the iREMS folder and the Reports Home page displays.



19-5. Reports Home page

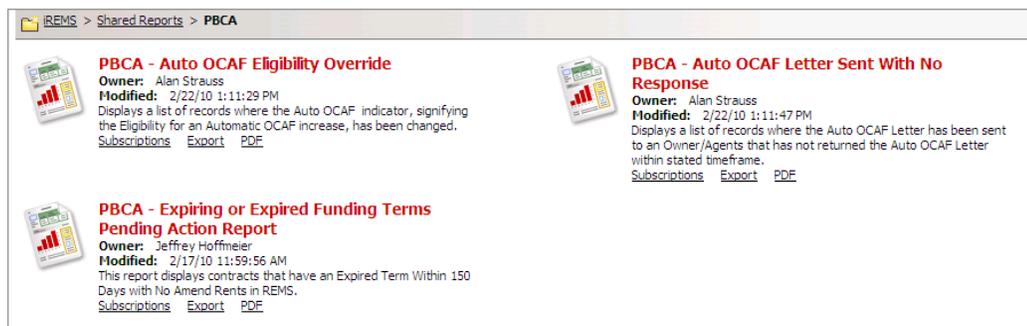


4. Click on the Shared Reports folder and the Reports Category page displays.



19-6. PBCA folder

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



19-7. PBCA Reports List page

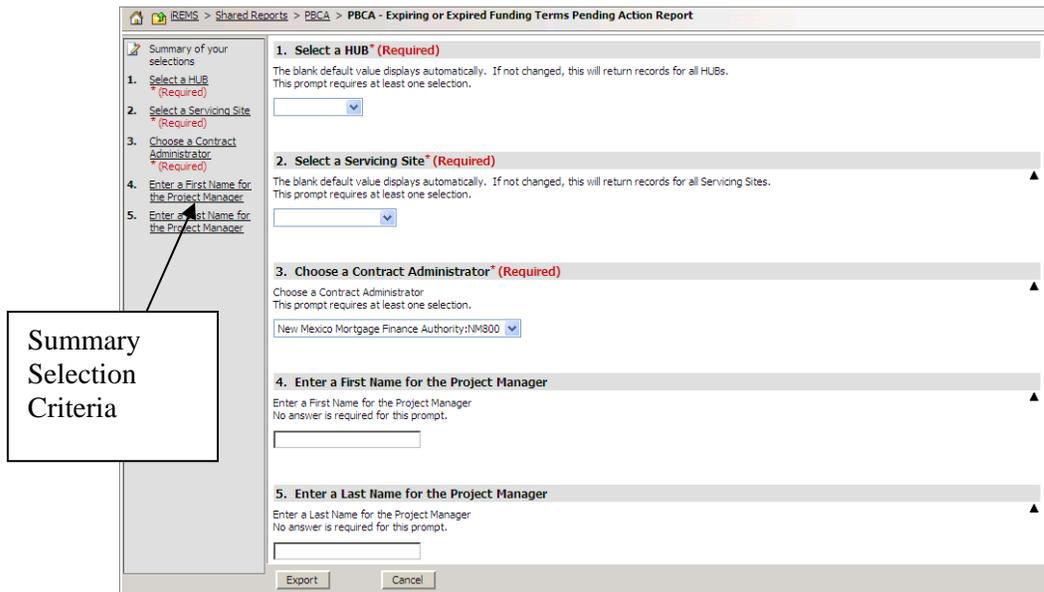
- Click on the file for the report you want to generate. To generate this file in **PDF** format, either click on the folder or the PDF link.



19-6. Selection for PDF report

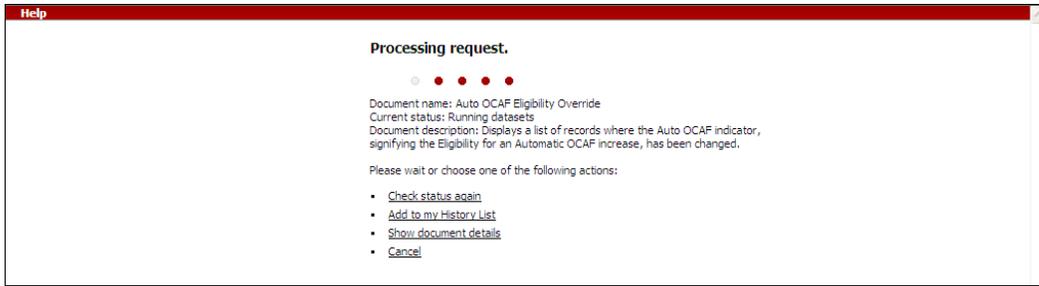
In this example, the Expiring or Expired Contracts Pending Action Report is selected.

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



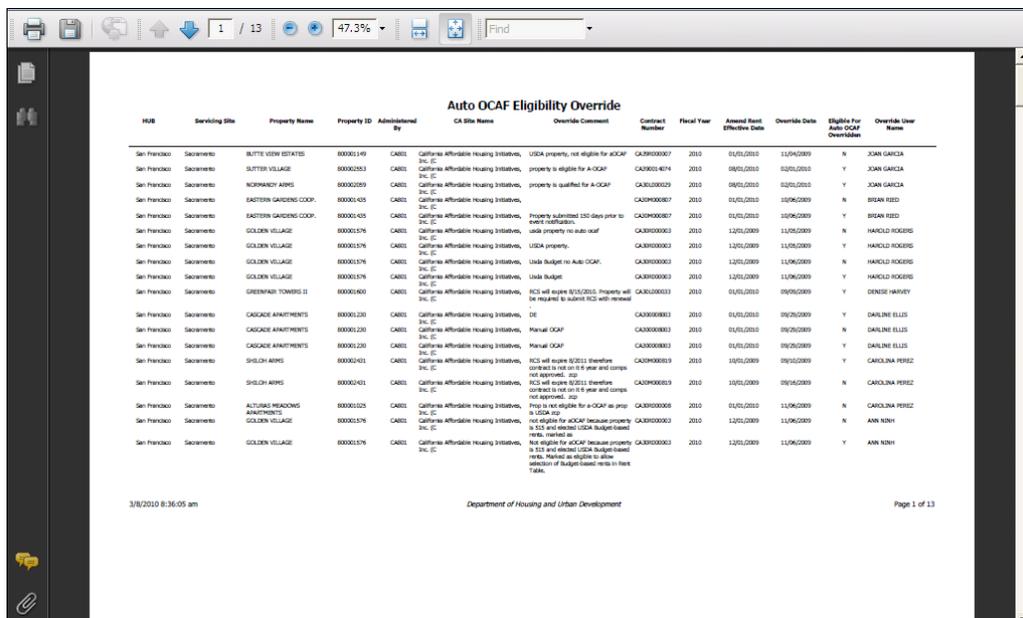
19-7. PDF Report parameter page

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



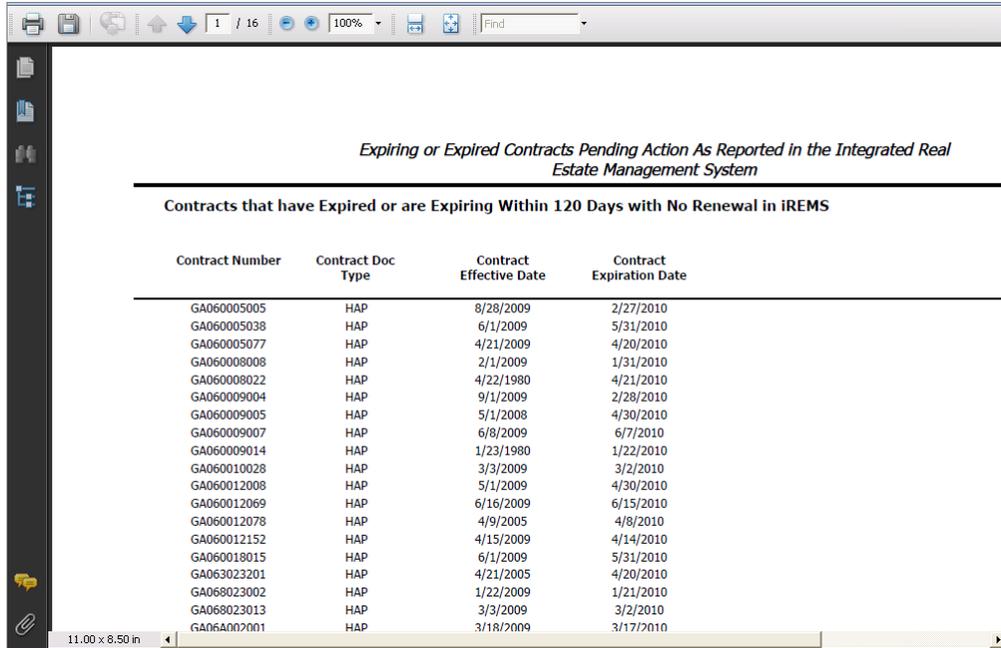
19-8. Processing request

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
GA06A007001	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

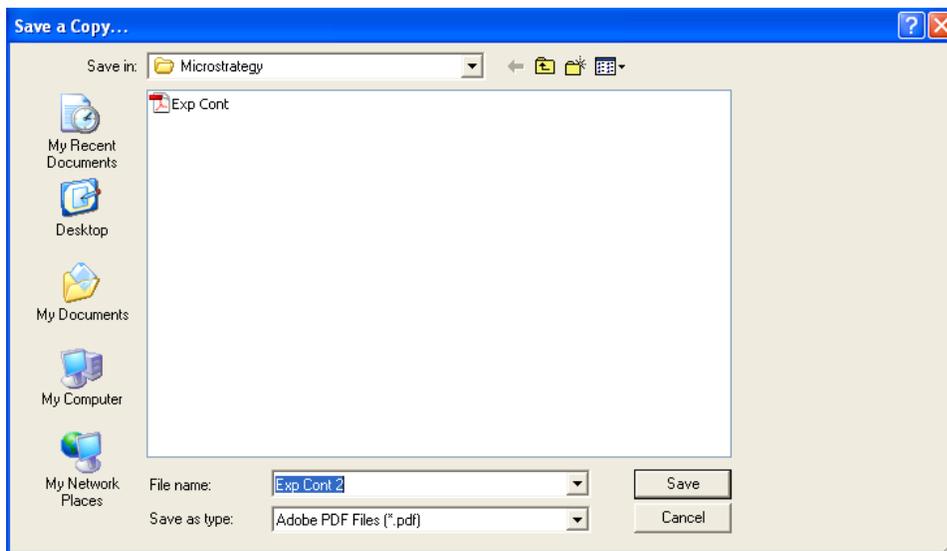
Expiring or Expired Contracts Pending Action As Reported in the Integrated Real Estate Management System

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
GA06A007001	HAP	3/18/2009	3/17/2010

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 and the report is saved in the folder you identified.

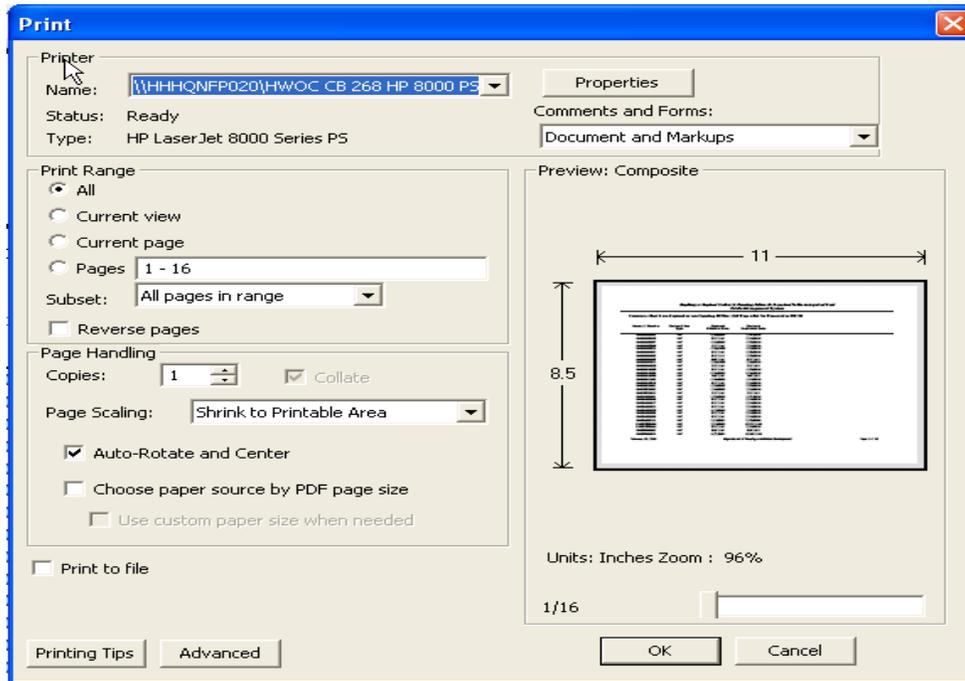
To Print a PDF Report:

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

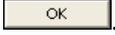


19-11. Toolbar

2. The Print page displays.



19-12. Print page

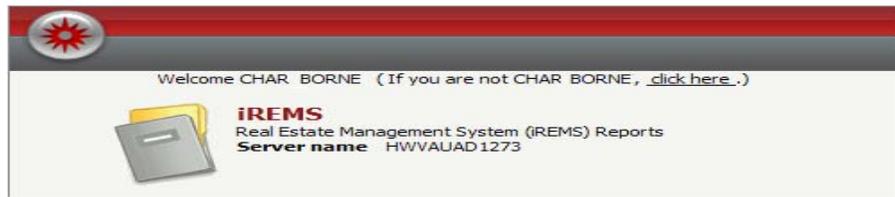
3. Check the printer details. If they match your printing requirements, click on .
4. The report prints to the designated printer.

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.

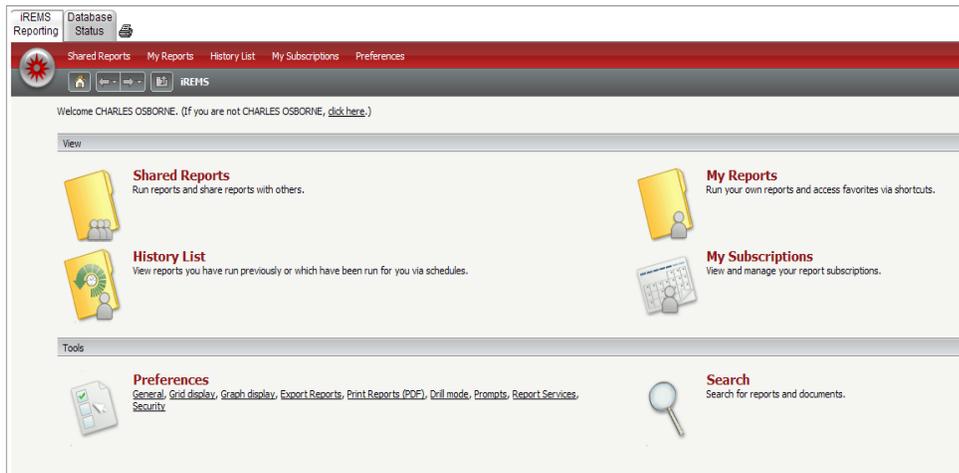
To export a report in MS Excel:

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



19-13. Welcome page

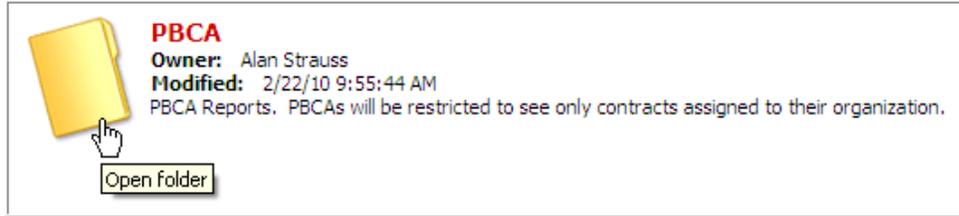
3. Click on the iREMS folder and the Reports Home page displays.



19-14. Reports Home page

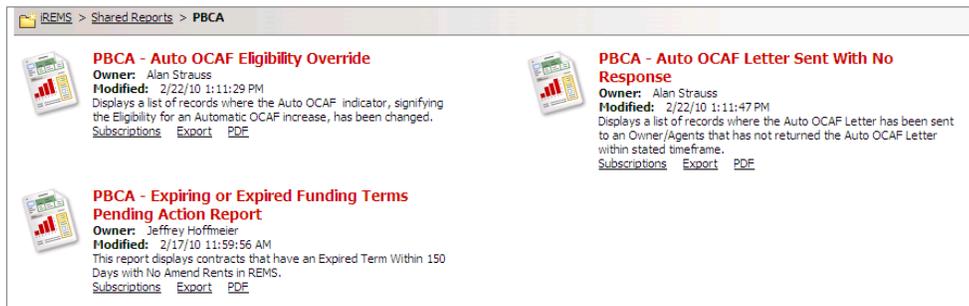


4. Click on the Shared Reports folder and the Reports Category page displays.



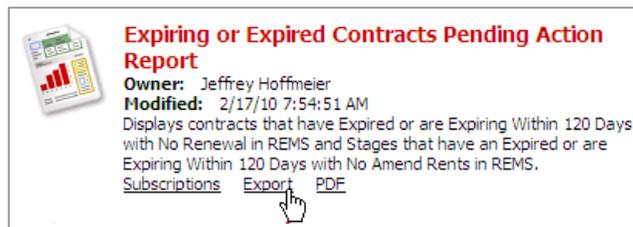
19-15. Shared Reports page

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.

Summary of your selections

1. Select a HUB* (Required)
2. Select a Servicing Site* (Required)
3. Choose a Contract Administrator* (Required)
4. Enter a First Name for the Project Manager
5. Enter a Last Name for the Project Manager

1. Select a HUB* (Required)
The blank default value displays automatically. If not changed, this will return records for all HUBs. This prompt requires at least one selection.

2. Select a Servicing Site* (Required)
The blank default value displays automatically. If not changed, this will return records for all Servicing Sites. This prompt requires at least one selection.

3. Choose a Contract Administrator* (Required)
Choose a Contract Administrator. This prompt requires at least one selection.

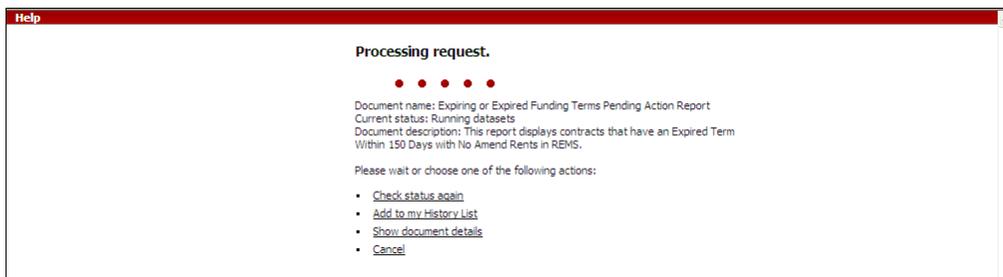
4. Enter a First Name for the Project Manager
Enter a First Name for the Project Manager. No answer is required for this prompt.

5. Enter a Last Name for the Project Manager
Enter a Last Name for the Project Manager. No answer is required for this prompt.

Export Cancel

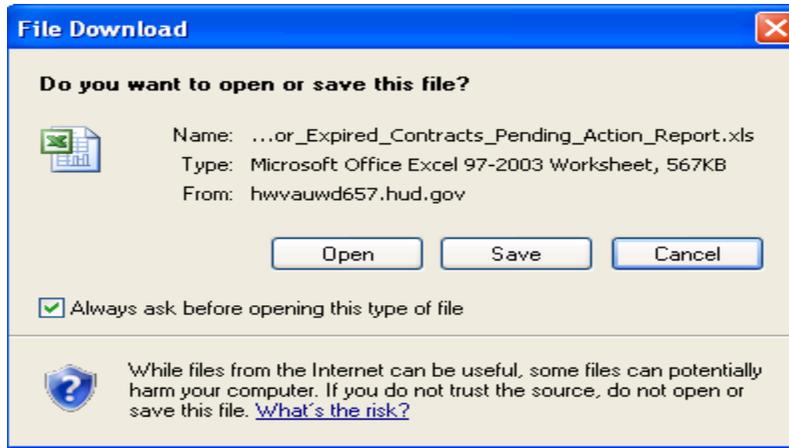
19-12. Excel Report parameter page

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.



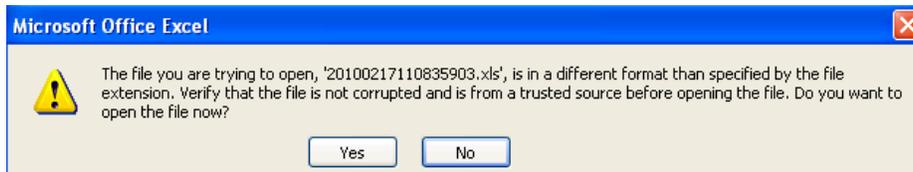
19-13. Processing request message

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



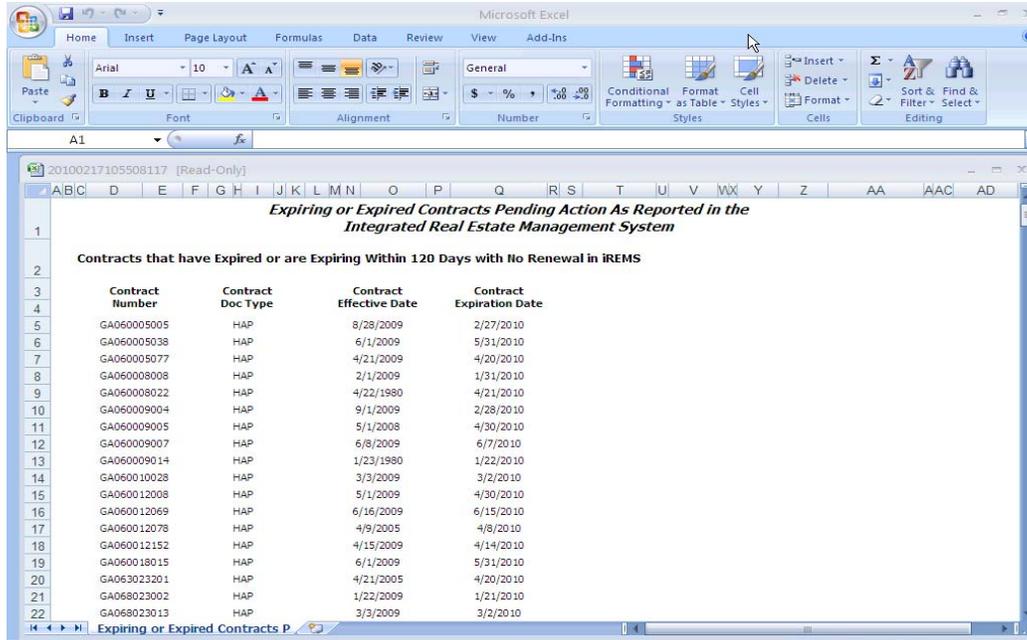
19-14. File Download box for Excel format

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.



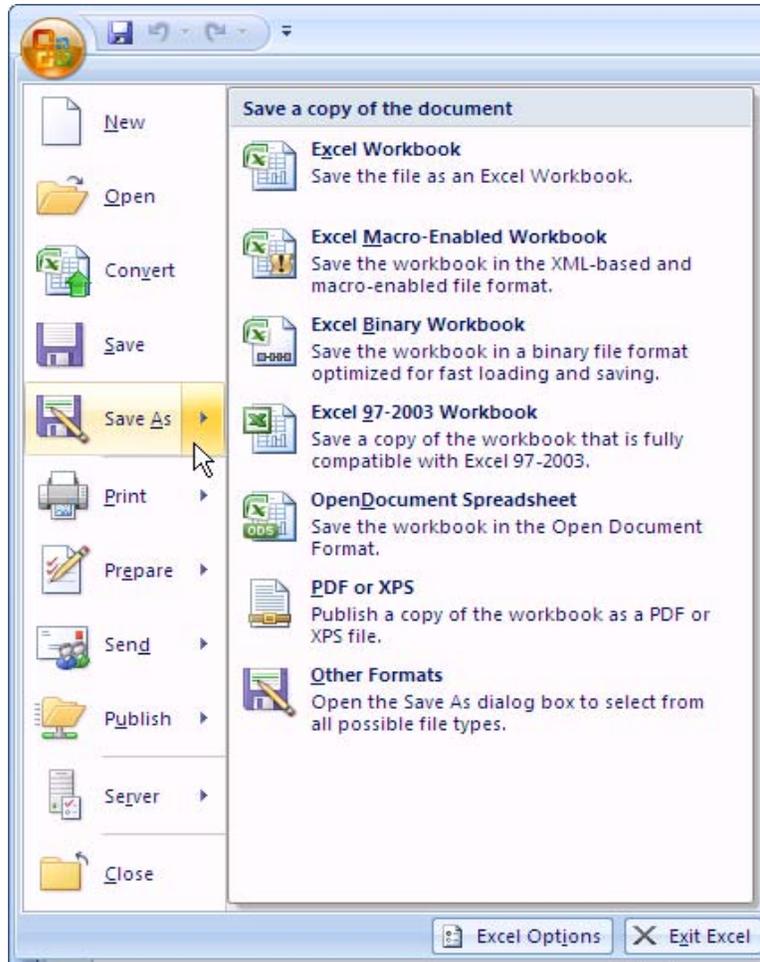
19-16. MS Excel Report

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:

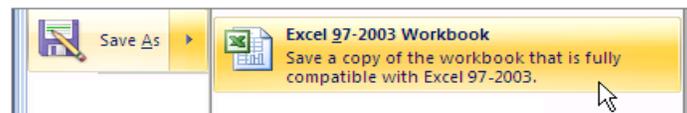
Once the Excel report is generated and displayed, you can save the report.

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



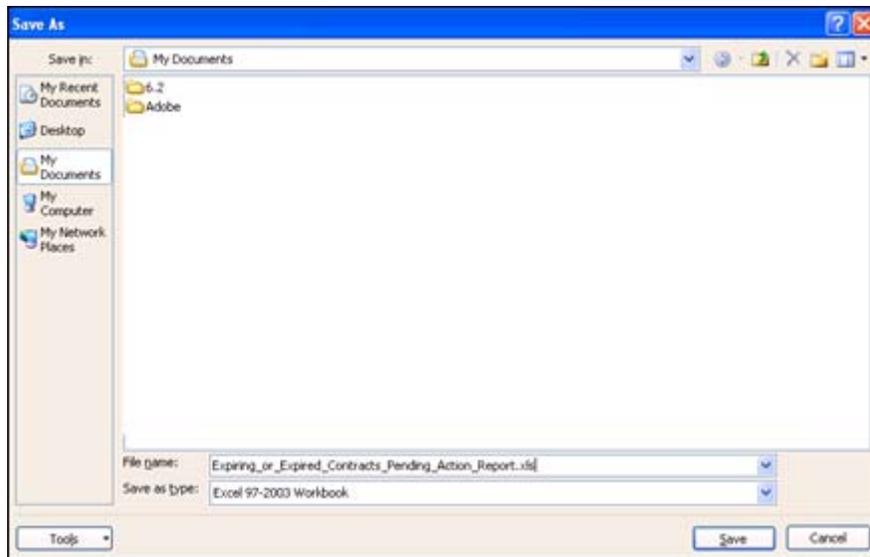
19-17. Save options page

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

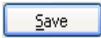


19-18. Save As selection

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

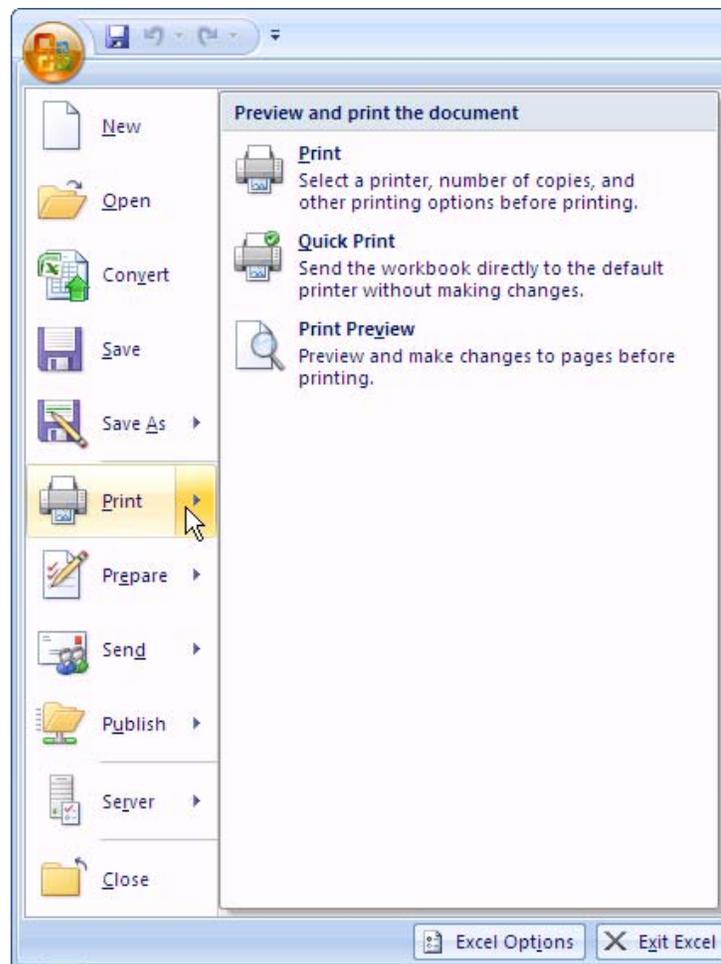


19-19. Save As page

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

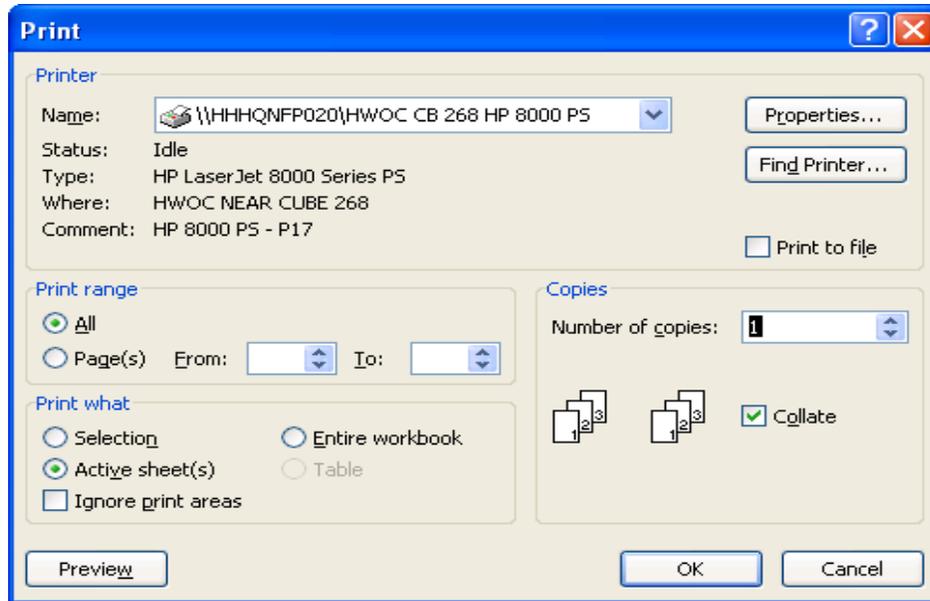
To print a MS Excel Report:

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.



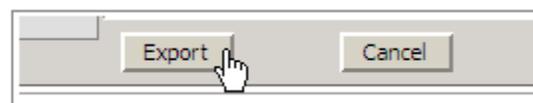
19-21. Print page

4. Check the printer details. If they match your printing requirements, click on .
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.

iREMS > Shared Reports > Subsidy Administration > Auto OCAF Eligibility Override

Summary of your selections

1. Select a HUB
2. Select a Servicing Site
3. Enter a Begin Date
4. Enter an End Date
5. Select a Contract Administrator

1. Select a HUB
The '-none-' default value displays automatically. If not changed, this will return records for all HUBs.
No answer is required for this prompt.
- none -

2. Select a Servicing Site
The '-none-' default value displays automatically. If not changed, this will return records for all Servicing Sites.
No answer is required for this prompt.
- none -

3. Enter a Begin Date
Enter a Begin Date
No answer is required for this prompt.
[Date Field] [Calendar Icon]
The default selection is: Today minus 1 Year(s) plus 1 Day(s)

4. Enter an End Date
Enter an End Date
No answer is required for this prompt.
[Date Field] [Calendar Icon]
The default selection is: Today

5. Select a Contract Administrator
Select a Contract Administrator from the list.
No answer is required for this prompt.
- none -

Export Cancel

19-23. Parameter page

iREMS > Shared Reports > PBCA > PBCA - Auto OCAF Eligibility Override

Summary of your selections

1. Select a HUB
The '-none-' default value displays automatically. If not changed, this will return records for all HUBs. No answer is required for this prompt.
- none -
2. Select a Servicing Site
The '-none-' default value displays automatically. If not changed, this will return records for all Servicing Sites. No answer is required for this prompt.
- none -
3. Enter a Begin Date
Enter a Begin Date
No answer is required for this prompt.
The default selection is: Today minus 1 Year(s) plus 1 Day(s)
4. Enter an End Date
Enter an End Date
No answer is required for this prompt.
The default selection is: Today
5. Choose a Contract Administrator* (Required)
Choose a Contract Administrator
This prompt requires at least one selection.
New Mexico Mortgage Finance Authority:NM800

Export Cancel

19-24. Example of MS Excel format

Date worksheet items use a pop up calendar for input.

3. Enter a Begin Date

Enter a Begin Date
No answer is required for this prompt.

The default selection is:

February 2010						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
	28					

4. Enter an End Date

Enter an End Date
No answer is required for this prompt.

The default selection is: Today

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.

2. Enter a Begin Date* (Required)
Enter a Begin Date
This prompt requires at least one selection.
 
The default selection is: Today minus 1 Year(s) plus 1 Day(s)

3. Enter an End Date* (Required)
Enter an End Date
This prompt requires at least one selection.
 
The default selection is: Today

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.

4. Enter Assigned User's First Name
Enter Assigned User's First Name
No answer is required for this prompt.

5. Enter Assigned User's Last Name
Enter Assigned User's Last Name
No answer is required for this prompt.

19-27. Search on User's Name

7. Analyst Name Search

Enter all or part of the Analyst's name to search for.
No answer is required for this prompt.

19-28. Name search

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

Select a Fiscal Year

Select one or more Fiscal Years.
No answer is required for this prompt.

- 1999
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010

19-29. On screen list

2. Select a Justification* (Required)

Select a Justification. 'All' also includes blank Justifications
This prompt requires at least one selection.

- All
- All
- Other
- Owners files AFS Prior to Pre-Penalty Letter
- Referred For Civil Money Penalty
- Returned to HUD - Erroneous Overdue Error
- Returned to MF - Beyond the Owners Control
- Returned to MF - Inconclusive Factual Support (i.e., approved waiver)
- Returned to MF - Mortgage Prepaid
- Settlement Agreement Executed

19-30. Drop-down list

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

<p>8. Enter the AFS Status.</p> <p>Enter the AFS Status. (O - Open, C - Closed, Blank = Open) No answer is required for this prompt.</p> <input type="text"/>
<p>9. Enter the AFS Required</p> <p>Enter the AFS Required (Y - Yes, N - No, blank = Yes) No answer is required for this prompt.</p> <input type="text"/>
<p>10. Enter Referred To</p> <p>Enter Referred To: (Values = None, MFH, DEC, Blank = All) No answer is required for this prompt.</p> <input type="text"/>

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.

<p>1. Select a HUB* (Required)</p> <p>The blank default value displays automatically. If not changed, this will return records for all HUBs. This prompt requires at least one selection.</p> <input type="text"/>
<p>2. Select a Servicing Site* (Required)</p> <p>The blank default value displays automatically. If not changed, this will return records for all Servicing Sites. This prompt requires at least one selection.</p> <input type="text"/>

19-32. Blank for HUB and Servicing Site

1. Select a HUB

The '-none-' default value displays automatically. If not changed, this will return records for all HUBs.
No answer is required for this prompt.

- none -

2. Select a Servicing Site

The '-none-' default value displays automatically. If not changed, this will return records for all Servicing Sites.
No answer is required for this prompt.

- none -

19-33. None for HUB and Servicing Site

3. Select a HUB* (Required)

The "All" default value displays automatically. If not changed, this will return records for all HUBs.
This prompt requires at least one selection.

All

4. Select a Servicing Site* (Required)

The "All" default value displays automatically. If not changed, this will return records for all Servicing Sites.
This prompt requires at least one selection.

All

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.

Excess Income Delinquency

Property Name: Crossett Apartments FIRM Number: 0244061
 HUB Name: Fort Smith Project Manager: SHEN CASSIDY
 Site Name: Little Rock

Process Year	Original Receivable Amount	Due Date	Annual Paid During Process Month	Ending Balance
04/2006	2066.00	05/21/2006	\$0.00	2066.00
05/2006	2066.00	06/14/2006	\$0.00	2066.00

Property Name: VIRGINIA MANOR APRTS FIRM Number: 1054402
 HUB Name: Duluth Project Manager: TERRE JONES
 Site Name: Duluth

Process Year	Original Receivable Amount	Due Date	Annual Paid During Process Month	Ending Balance
02/2002	25,144.00	04/30/2002	\$0.00	25,144.00
04/2002	25,144.00	05/16/2002	\$0.00	25,144.00
05/2002	25,099.00	05/08/2002	\$0.00	25,099.00
07/2002	24,176.00	12/20/2002	\$0.00	24,176.00
08/2002	11,558.00	12/20/2002	\$0.00	11,558.00
10/2002	350.00	12/20/2002	\$0.00	350.00
11/2002	17,778.00	04/14/2003	\$0.00	17,778.00
02/2003	17,875.00	04/14/2003	\$0.00	17,875.00
11/2004	1172.00	01/26/2005	\$0.00	1172.00
11/2004	843.00	01/26/2005	\$0.00	843.00
10/2006	2444.00	01/26/2008	\$0.00	2444.00
04/2006	2101.00	01/18/2008	\$0.00	2101.00
06/2006	110.00	01/18/2008	\$0.00	110.00
07/2006	1117.00	01/26/2008	\$0.00	1117.00
08/2006	1211.00	01/26/2008	\$0.00	1211.00
05/2006	2100.00	01/26/2008	\$0.00	2100.00
04/2006	1106.00	01/26/2008	\$0.00	1106.00
02/2006	843.00	01/26/2008	\$0.00	843.00

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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.

Excess Income Delinquency

Report Parameters:

HUBs
 Servicing Site
 Assigned User First Name
 Assigned User Last Name
 Property Status: Y

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19-36. Sample Parameter Summary page

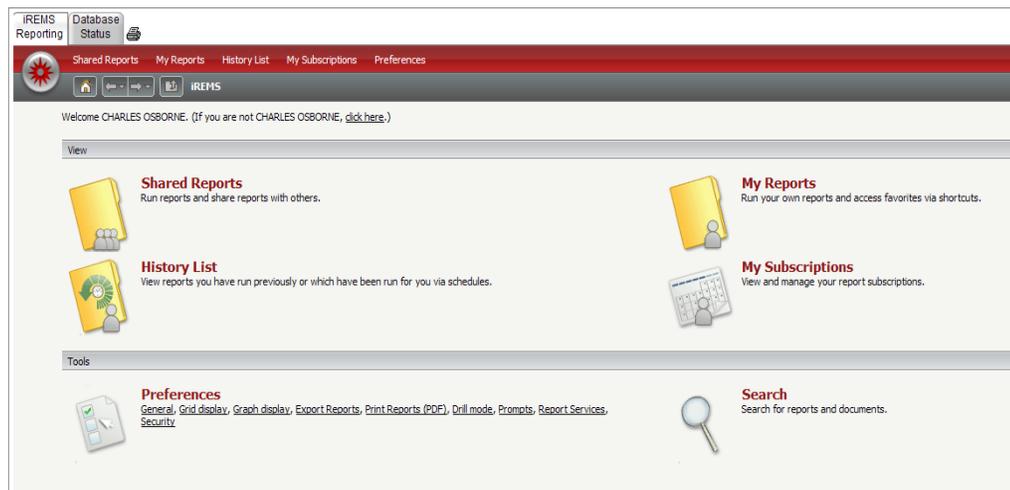
19.6 History List

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.



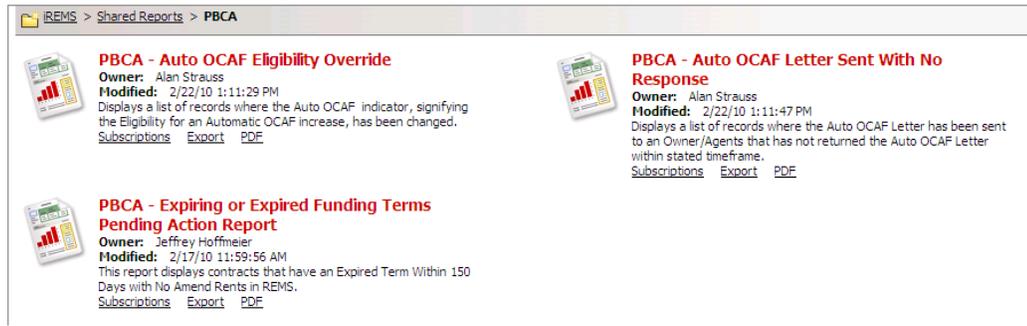
19-37. Reports Home page

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



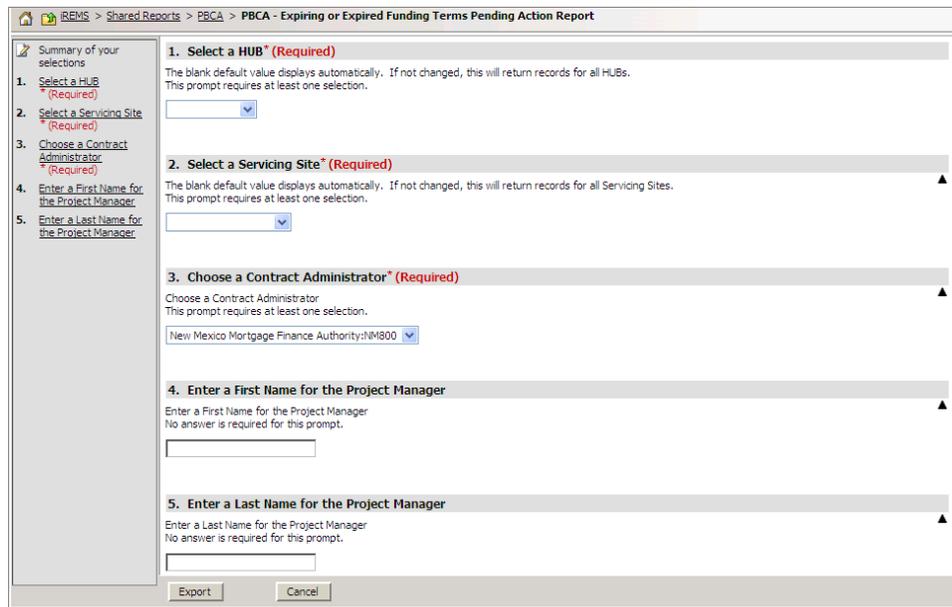
19-38. PBCA folder

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



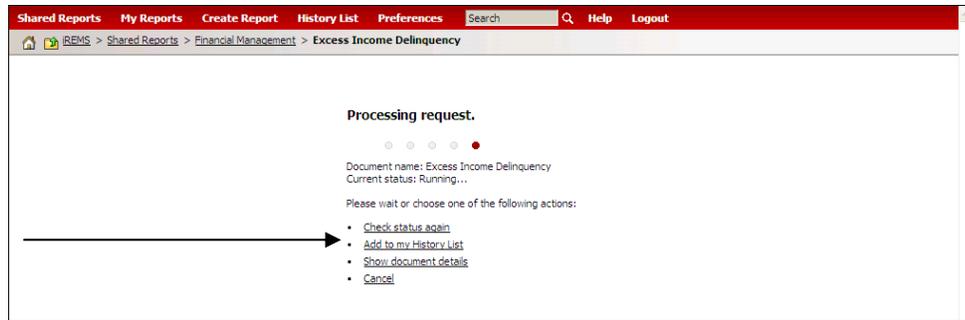
19-39. PBCA Reports page

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



19-40. Parameters page

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

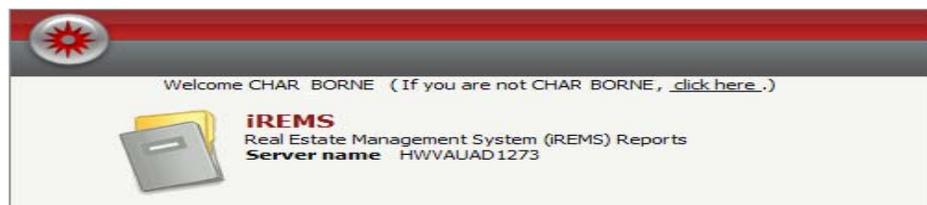


19-41. Processing/Status page

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

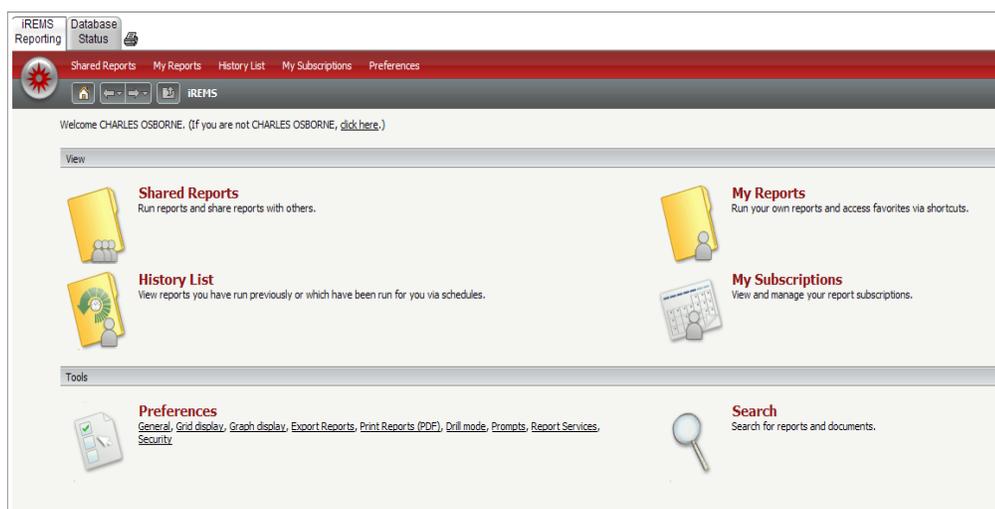
To access the History List page:

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

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.



PBCA
Owner: Alan Strauss
Modified: 2/22/10 9:55:44 AM
 PBCA Reports. PBCAs will be restricted to see only contracts assigned to their organization.

Report Name	Selection Parameters
PBCA - Auto OCAF Eligibility Override	HUB (required) Servicing Site (required) 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) Project Manager