

# Admin Module

## Monitoring, Audit and Technical Assistance

- Demonstrate oversight efforts
- Adding/Editing Events
- Adding/Editing Event Topics
- Public View

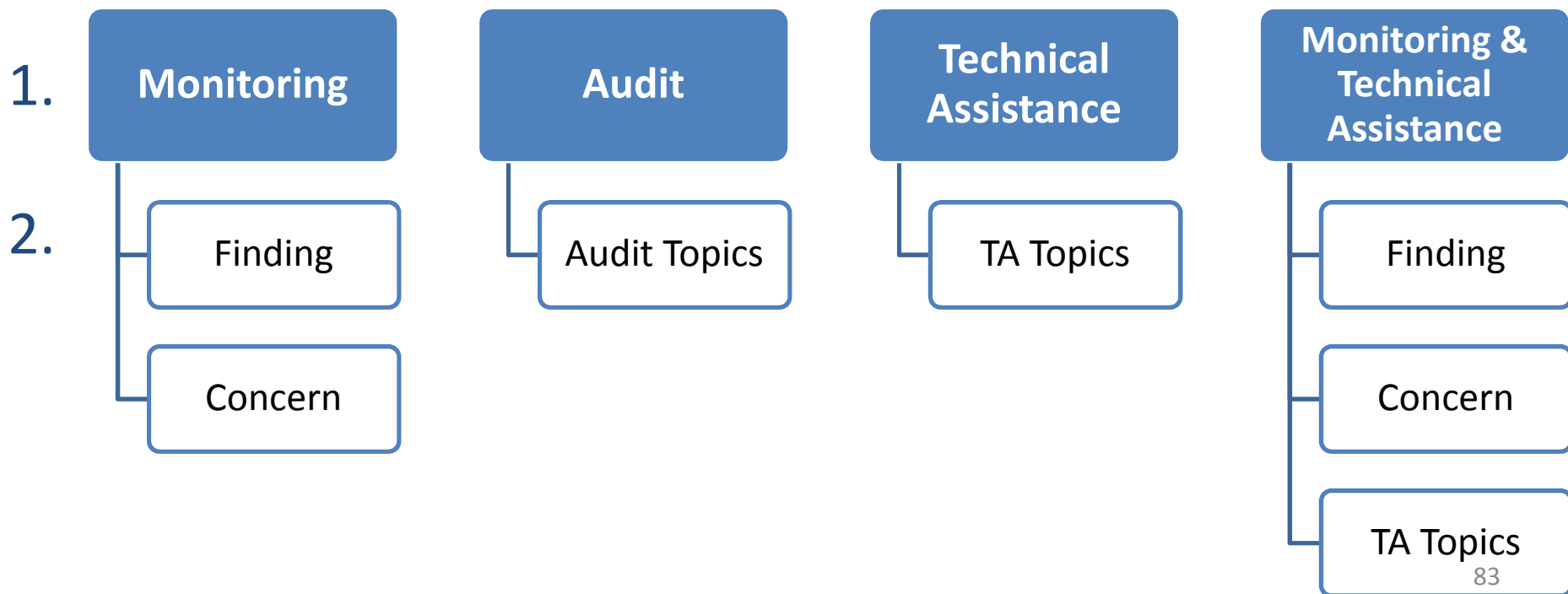
# Admin Module: Monitoring/Audit/TA

- Overview and Purpose
  - Required for DR CDBG Appropriations
  - Helps grantees keep track of their oversight activities
    - Document monitoring, audit, and technical assistance activities
    - Record findings, concerns
  - Keeps HUD informed of grantee monitoring and TA actions
- HUD FO role:
  - Can review grantee's activities
  - NOT for HUD staff to report on HUD's monitoring activities

# Monitoring/Audit/TA Flow Chart

Two Basic Levels:

1. Events (4 different types of Events to chose from)
2. Findings, Concerns and/or Topics



# Categories: Program Requirement

- Drop down menu of Program Requirement Category codes are unique to each appropriation.
- Example includes DR CDBG category code options:

Category Code	Program Requirement Category Name
DISASTER	Related to Disaster
DUP BEN	Duplication of Benefits
ELIG ACTIV	Eligible Activity
ENVIR	Environmental
FHEO	Fair Housing & Equal Opportunity
FINMGMT	Financial Management
LABOR	Davis Bacon Wage Requirements
NATOBJ-LM	National Objective- Low Mod
NATOBJ-S&B	National Objective - Slum & Blight
NATOBJ-UN	National Objective - Urgent Need
OTHERFED	Other Federal Requirements

# 1<sup>st</sup> Level: Add/Edit Event

- What: Event Type
  - Monitoring
  - Audit
  - Technical Assistance
  - Monitoring/Technical Assistance
- Funding Type: Grant #
- Who: Responsible Org
- Where: Onsite or Remote
- When: Start, End, and Report Date
- Result:
  - Finding or Concern
  - TA or Audit Topic

# 1<sup>st</sup> Level: Add/Edit Event

Admin

## Add/Edit Monitoring/Audit/TA Event

- Monitoring/Audit/TA has been saved.

Originator: T001GA T001GA

\*Reference Number: 2011-SF

\*Event Type: ☐ Monitoring ☐ Audit ☐ Technical Assistance ☒ Monitoring/Technical Assistance

\*Organization Reviewed/Assisted:   
Greater Denver Housing Help

\*Event Conducted: ☐ On-Site ☒ Remote

\*Grants:

B-08-MN-99-0106  
B-08-MN-99-0105  
B-08-MN-99-0104  
B-08-MN-99-0103  
B-08-MN-99-0102

\*Program Requirement Categories:

CONSTRUCT  
ELIG ACTIV  
ELIG USE  
ENVIR  
FHEO

\*Start Date: 01/02/2012 [Select Date](#) (ex: mm/dd/yyyy)

End Date:  [Select Date](#) (ex: mm/dd/yyyy)

Report/Letter Date:  [Select Date](#) (ex: mm/dd/yyyy)

Event Description:

Event Topics:

Select	Monitoring Type	Id	Status	Response/Deadline Date	Action
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Delete Selected

Add Finding

Add Concern

Add Audit Topic

Add TA Topic

Save

Cancel

As of Release 7.3, grants are selected at the Event Level.

Event Type selected corresponds with the sub category options activated below (Finding, Concern, Topic)

## 2<sup>nd</sup> Level: Add/Edit Finding

- Finding ID & Title
- Description of Finding, including regulatory citation
- Activities
- Program Requirement
- Corrective Action
- Amount Requested
- Amount Recovered
- Status: Open or Closed
- Follow Up Action

# 2<sup>nd</sup> Level: Add/Edit Finding

## Admin

### Add/Edit Finding

\*Indicates required fields

**Originator:** T001GA T001GA

**Reference Number:** 2011-SF

**Organization Reviewed/Assisted :**

**\*Program Requirement Category:** LH25 ▼

**\*Activities:**

Select	Grant #	Activity #
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None

Delete Selected

Select Activities





## 2<sup>nd</sup> Level: Add/Edit Finding

**\*Finding Id:**

**Finding Title:**

**\*Corrective Action Type:**

**Description of Finding, including Regulatory Citation:**

**Corrective Action:**

**Amount Requested:** \$

**Amount Recovered:** \$

**Is this closed Finding subject to future verification:** ☐ Yes ☒ No

**\*Response Deadline Date:**  [Select Date](#)

**\*Status:** ☒ Open ☐ Closed **\*Closed Date:**  [Select Date](#)

**Follow Up:**

## 2<sup>nd</sup> Level: Findings - Corrective Action

- No Action Required
- Corrective Actions
  - Reprogram Funds
  - Reimburse
  - Change Payment
  - End/Alter
  - Future Grant
  - Other
- Sanctions
  - Hearing
  - Reduce/Suspend/ De-obligate Funds
  - Reduce future grant
  - Terminate grant
  - Other

## 2<sup>nd</sup> Level: Add/Edit Concern

- ID & Title
- Activities
- Program Requirement
- Description
- Recommended Action
- Status: Open or Closed

# 2<sup>nd</sup> Level: Add/Edit Concern

Admin

Add/Edit Concern

Organization Reviewed : 

\*Program Requirement Category: ELIG USE

\*Activities:

Select	Grant #	Activity #
<input type="checkbox"/>	B-08-MN-99-0103	NSP1-B A/R MF DHH LMMI
<input type="checkbox"/>	B-08-MN-99-0103	NSP1-B A/R MF DHH LH25

Delete Selected

Select Activities

\*Concern Id:

Concern Title:

Description of Concern:

Recommended Action:

\*Status: ☒ Open ☐ Closed

Save

Cancel

## 2<sup>nd</sup> Level: Add/Edit Audit Topic

- Audit Topic ID & Title
- Description of Audit, including regulatory citation
- Activities
- Program Requirement Category
- Corrective Action
- Amount Requested
- Amount Recovered
- Status: Open or Closed
- Follow Up Action

## 2<sup>nd</sup> Level: Add/Edit Audit Topic

### Admin

#### Add/Edit Audit Topic

\*Indicates required fields

Origin to

Organization Reviewed :

Responsible Organization Conducting Audit Topic:

Select

\*Program Requirement Category: ELIG ACTIV ▼

\*Activities:

Select

Grant #

Activity #

☐

B-08-DN-99-0003

NSP1-02 AR MF Set Aside

Delete Selected

Select Activities

## 2<sup>nd</sup> Level: Add/Edit Audit Topic

**\*Audit Topic Id:**

**Audit Topic Title:**

**\*Corrective Action Type:**

**Description of Audit Topic:**

**Corrective Action:**

**Amount Requested:** \$

**Amount Recovered:** \$

**Is this closed Audit Topic subject to future verification:** ☐ Yes ☒ No

**\*Response Deadline Date:**  [Select Date](#)

**\*Status:** ☒ Open ☐ Closed **\*Closed Date:**  [Select Date](#) (ex: mm/dd/yyyy)

**Follow Up:**

## 2<sup>nd</sup> Level: Add/Edit TA Topic

- TA Topic ID & Title
- Description of TA, including regulatory citation
- Activities
- Include additional Organizations Assisted
- Program Requirement Category
- Rationale
- TA Topic Provider
- Conclusion



## 2<sup>nd</sup> Level: Add/Edit TA Topic

### Admin

#### Add/Edit TA Topic

Indicates reviewed/assisted in

Reviewed/Assisted : 2011-DAH

Organization Reviewed/Assisted : [REDACTED]

Responsible Organizations in Attendance:

Edit

\*Program Requirement Category: LH25

\*Activities:

Select

Grant #

Activity #

☐

B-08-DN-99-0003

NSP1-02 AR SF DAH

Delete Selected

Select Activities

## 2<sup>nd</sup> Level: Add/Edit TA Topic

**\*TA Topic Id:**

**TA Topic Title:**

**\*Rationale:**

**\*TA Topic Provider:**

☒ **Grantee Staff**

☐ **Contractor's Responsible Organization:**

**Description:**

**Conclusion:**

# Search Events

## Admin

### Search Event Topics

[Help?](#)

#### Search Criteria

**Reference Number:****Event Topics Selection:**

Finding  
Concern  
TA Topic  
Audit Topic

**Responsible Organization:****Grant Number:****Grantee Activity Number:****Program Requirement Category:****ID:****Monitoring/TA Start Date:**

From:  [Select Date](#)  
(ex: mm/dd/yyyy)

To:  [Select Date](#)  
(ex: mm/dd/yyyy)

**Monitoring/TA Report/Letter Date:**

From:  [Select Date](#)  
(ex: mm/dd/yyyy)

To:  [Select Date](#)  
(ex: mm/dd/yyyy)

**Event Status:**

Select Option ▾

**Finding Response/Deadline Date:**

[Select Date](#)  
(ex: mm/dd/yyyy)

**Finding Close Date:**

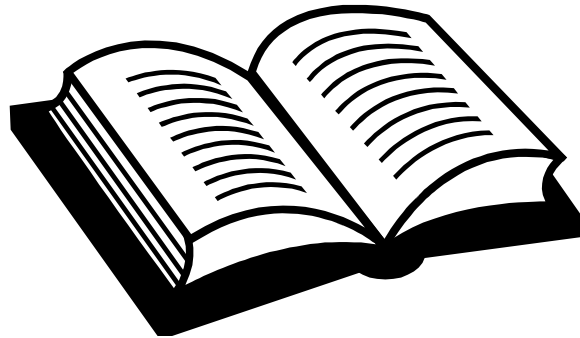
[Select Date](#)  
(ex: mm/dd/yyyy)

# Public View: Summary (QPR)

## Monitoring, Audits, and Technical Assistance

	This Report Period	To Date
Monitoring Visits	4	12
Audit Visits	2	5
Technical Assistance Visits	3	9
Monitoring/Technical Assistance Visits	1	2
Report/Letter Issued	6	14

# Monitoring, Audit, and Technical Assistance



## Admin Module Review

- Module helps grantees demonstrate and detail oversight efforts
- Tracks grantees, not HUD's, oversight efforts
- Not a monitoring system – only captures summary data.
- Only summary info available on QPR; more detail available in Admin module

# DRGR Reports

The Optional Module  
Standard Reports  
Modifying/Saving Reports  
Public Reports



# Reports

- Purpose:
  - Reports provide a relatively quick and easy way of accessing the most up-to-date information in DRGR related to user accounts, obligations and drawdowns, report status, etc.
- HUD FO:
  - Examine financial information and user account info
  - Determine AP/QPR review status.
- Grantee:
  - Examine financial information and user account info
  - Determine AP/QPR status.

***Which reports you can access will vary based on the type of account you have. It is a purely OPTIONAL module.***



# Accessing Reports

1.



## Disaster Recovery Grant Reporting System (DrgrRep) - FY2008 - 001A

Project description unavailable

Server name HWVAUAP1364.HUD.GOV

2.



## Shared Reports

Run reports and share reports with others.

3.



## Public Reports

Owner: Administrator

Modified: 5/4/12 12:00:12 PM

Available reports: n/a

OR



## Standard Reports

Owner: Administrator

Modified: 5/18/12 11:31:13 AM

Contains custom defined reports

4.



## Grantee User Reports

Owner: Administrator

Modified: 6/12/12 6:55:01 PM

OR



## HUD Field Office User Reports

Owner: Administrator

Modified: 5/18/12 6:05:47 PM

# Public vs. Standard Reports

- **Public Report:** Interactive charts and graphs showing progress by grants, activity category or grantee projects. Contain any shared reports that can be accessed by all users.
- **Standard Reports:** Data files like spreadsheets used for tracking and quality control often containing data at the activity level. More commonly used by grantees.

# Standard Reports



- Administrative Reports
  - User information
  - Action Plan/QPR status
- Financial Reports
  - Budgets
  - Disbursements
  - Cumulative financial data
- Performance Reports
  - Beneficiary measures



# Standard Reports: Admin

**Admin Rept01a: GRANT - DRGR Grant Status and CPD Contact**

This report shows grant status, including drawdown and obligation blocks. It also includes CPD contact for each grant. If info needs to be updated, please send to [DRGR\\_Help@hud.gov](mailto:DRGR_Help@hud.gov)

**Admin Rept02b: ACTPLN - Activity Status with Start and End Dates**

Performance data in this report is aggregated measure types so the numbers are not meaningful in themselves. It is only include as an indicator of whether accomplishments were entered or not.

**Admin Rept03b: QPR - Exec Summary Progress Narrative**

This report shows the overall progress narrative at the grant level by QPR

**Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status**

This report shows system role and recertification status for grantee users. Grantee admin users must be recertified by CPD representatives and other grantee users are certified by grantee admin users. Recertifications are required every 6 months.

**Admin Rept05a: ADMIN - Responsible Organization List**

This report is a master list of responsible organizations and associated data by grantee.

**Admin Rept02a: ACTPLN - Grant and DRGR Action Plan Review Status**

This report shows whether grant is blocked from drawdowns as well as the date of the last DRGR AP approval and the current status of the DRGR AP.

**Admin Rept03a: QPR - Report Status**

This report will only show the status of QPRs that have been added by grant. Grantees must add each QPR as they are due.

**Admin Rept04a: USERS - Grantee DRGR Users Account Status**

This is a master list of all Grantee DRGR user accounts.

**Admin Rept04f: USERS – DRGR Authorized Users Access by Grant**

This report is a master list of HUD point of contact and grantee authorized user(s) by grant.

**Admin Rept05b: ADMIN- Oversight Events - Event Level**

This is a fully prompted report that can be used as a template for building other reports.

**Admin Rept05c: ADMIN- Oversight Events - Topic Level**

This is a fully prompted report that can be used as a template for building other reports.

# Standard Reports (Admin Rept04b)

Shared Reports My Reports History List My Subscriptions Create Report Preferences											
Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status											
Home Tools Data Grid Format											
REPORT DETAILS											
Report Filter: {Role.Description - No security filter} = GA:Grantee Administrator, DD_R:Drawdown Request User, GU:Grantee User, GP:Grantee Public privileges, DD_A:Drawdown Approve User											
PAGE-BY: State: Louisiana Grantee: State of Louisiana											
1 2 of 2 pages											
User Name	User ID	User Email	Account Status	Recertification Status	Recertification Date	Recertification Approver	System Role				
Susan Elkins	C22001		Inactive	Expired	12/22/2011	H21447 Hunter Kurtz	GA	Grantee Administrator			
Donna Ramirez	C22002		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GA	Grantee Administrator			
Stacy Bonaffons	C22003		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GA	Grantee Administrator			
Sandra Smith	C22004		Active	Expired	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
Starr Moore	C22005		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GA	Grantee Administrator			
Laurie Brown	B00893		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GA	Grantee Administrator			
Gene Knecht	C22007		Inactive	Expired	12/12/2011	B00893 Laurie Brown	GP	Grantee Public privileges			
Laurie Brown	B50011		Deleted	Expired	12/22/2011	H21447 Hunter Kurtz	GA	Grantee Administrator			
Thomas Brennan	C22008		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
Jennifer Santos	B00380		Active	Expired	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
Wanda Walton	C14729		Active	Expired	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
Megan Meche	B00854		Inactive	Recertified	1/12/2012	H21803 Mark Mitchell	GU	Grantee User			
Belinda Olivier	C14638		Active	Recertified	1/18/2012	H07637 Diane Lobasso	DD_R	Drawdown Request User			
Anita Minor	C27844		Active	Recertified	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
							DD_A	Drawdown Approve User			
Avia Quebedeaux	B00176		Active	Expired	1/18/2012	H07637 Diane Lobasso	GU	Grantee User			
							DD_R	Drawdown Request User			

# Standard Reports: Financial (Fin.1)

## **Fin Rept01a: ACTPLN- Grant Budgets by National Objective - Activity Level**

This report can be used to create a master list of activities for each grant.

## **Fin Rept01c: DRAWS- Budget and Disbursements by National Objective - Grant Level**

This is a summary report at the grant level. It will only show amounts budgeted and disbursed from activities entered into DRGR.

## **Fin Rept02b: DRAWS- Voucher Status by Line Item - Program Income**

This report shows the status and approval dates for each voucher line item using program income by project, activity, and responsible organization.

## **Fin Rept03: DRAWS - Voucher Status by Line Item - Grant Funds**

This is a report showing the status and action dates of voucher line items (note: draws before Jan.1, 2009 are simulated from QPRs).  
SORTED BY VOUCHER AND VOUCHER ITEM #

## **Fin Rept05a: CUM - Program Income - Grant Level**

This is a report showing data at the grant level program income disbursements recorded in the drawdown module and program income received across all QPRs (regardless of QPR status)

## **Fin Rept01b: ACTPLN - DRGR Grant Activity Budgets by Project**

This report shows activities and their budgets by project. NOTE: Since this is an activity level report, project budgets will repeat on each activity row within the project.

## **Fin Rept02a: DRAWS- Voucher Status by Line Item and QPR Begin Date- Grant Funds**

This report shows the status, approval dates, and LOCCS submit date for each voucher line item using GRANT FUNDS by project, activity, and responsible organization. The report now includes a dropdown for QPR BEGIN DATE and GRANT PROGRAM.

## **Fin Rept02c: Voucher Revision Report - Grant Funds**

This report shows the amount of funds distributed across activities on REVISED voucher line items for activities with grant funds. It includes creation and approval users/dates.

## **Fin Rept04: DRAWS - Voucher Line Item Status by Project - Grant Funds**

This is a report showing the status and action dates of voucher line items (note: draws before Jan.1, 2009 are simulated from QPRs)  
SORTED BY PROJECT and ACTIVITY #

## **Fin Rept05b: CUM - Program Income - Activity Level**

This report shows data at the activity-level: a) grant funds budgeted, b) grant fund obligations and approved grant and program income disbursements recorded in the drawdown module and c) program income received across all QPRs

# Standard Reports: Financial (Fin. 2)

## **Fin Rept05c: Receipts by Project and Activity**

This report shows Receipts in the Drawdown module recorded for Program Income and RLFs. (Note: Receipts before Dec.3, 2011 are simulated PI Received amounts recorded in QPRs from before that date)

## **Fin Rept06: CUM - Fin Data - Grant Level**

This report shows grant-level financial data entered or calculated by quarter. It includes grant funds and program income. Grant obligations entered from Jan 09 are updated amounts rather than incremental.

## **Fin Rept07a: CUM - Grant Funds Financial Summ – Activity Level by Project**

This is a report showing data at the project level from the latest DRGR Action Plan and across all QPRs (regardless of QPR status) SORTED BY STATE, GRANT # and PROJECT #.

## **Fin Rept07c: QPR - Fin Data by Activity and Quarter**

This report shows activity-level financial data entered or calculated by quarter. This can be used to troubleshoot data entry errors across quarters. Report updated to include project # and title. QPRs only show if financial activity during quarter.

## **Fin Rept08b: CUM - Grant Funds Financial Summ - Activity Level by Project**

This is a report showing data at the activity level from the latest DRGR Action Plan and across all QPRs (regardless of QPR status) SORTED BY PROJECT AND ACTIVITY #

## **Fin Rept09b: QPR - Fin Data by Activity and Quarter**

This report shows activity-level financial data entered or calculated by quarter. This can be used to troubleshoot data entry errors across quarters. Obligations entered from Jan 09 are updated amounts rather than incremental.

## **Fin Rept05d: Program Income Account Summary**

This report shows the sum of activity budgets, obligations, program income received, and program income disbursed within each PI account. It does not include any activities not assigned to a PI account.

## **Fin Rept06b: CUM - NSP Financial Summ - Grant Level - LH25**

This report shows a grant-level snapshot of financial activity for activities benefiting households below 50% AMI

## **Fin Rept07b: CUM - Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj**

This report shows activity-level financial data entered or calculated by quarter. This can be used to troubleshoot data entry errors across quarters. Obligations entered from Jan 09 are updated amounts rather than incremental.

## **Fin Rept08a: CUM - Grant Funds Budget and Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj**

This is a report showing data at the activity level from the latest DRGR Action Plan and across all QPRs (regardless of QPR status) W/ RESP ORG, ACT TYPE AND NAT OBJ

## **Fin Rept09a: QPR - Fin Data by Quarter - Grant Level**

This report shows grant-level financial data entered or calculated by quarter. Obligations entered since Jan 09 are updated amounts rather than incremental.



# Standard Reports: Financial

## (Fin Rept05b)

Disaster Recovery Grant Reporting System (DrgRpt) - FY2008 - 001A > Shared Reports > Standard Reports > HUD Field Office User Reports > Fin Rept05b: CUM - Program Income - Activity Level										
Last update: 6/13/12 2:43:32 PM										
REPORT DETAILS										
Report Filter: Empty Filter										
PAGE-BY: Grant Status: Active Grantee: Grant Number:										
Data rows: 1 - 50 of 93   Data columns: 5										
Project Number	Project Title	Activity Type	Activity Number	Responsible Organization	Metrics	Grant Funds Budgeted	Grant Funds Obligated	Grant Funds Disbursed	Program Income Received	Program Income Disbursed
360	Aq&Rehab SF	Rehabilitation/reconstruction of residential structures	21-361 NEW Rehab SF LMMI	New Economics For Women		\$20,468,653.00	\$15,670,975.99	\$13,643,336.70	\$6,556,391.65	\$2,027,639.29
			31-361 CRHDC Rehab SF LMMI			\$13,656,129.00	\$10,344,104.68	\$7,975,336.93	\$3,002,711.63	\$2,368,767.75
			11-361 CPLC Rehab SF LMMI			\$13,275,536.00	\$12,100,494.57	\$9,227,221.50	\$2,812,929.59	\$2,873,273.07
			33-361 DelNorte Rehab SF LMMI			\$5,221,000.00	\$4,233,405.66	\$3,133,582.72	\$2,220,883.46	\$1,099,822.94
			51-361 TDS Rehab SF LMMI			\$6,739,021.00	\$4,353,613.21	\$3,604,263.20	\$1,382,541.37	\$749,350.01
			21-361 NEW Rehab SF LH25			\$3,041,451.00	\$2,401,876.96	\$2,187,943.64	\$1,240,720.10	\$213,933.32
			33-361 DelNorte Rehab SF LH25			\$3,420,000.00	\$1,888,468.56	\$1,480,809.77	\$1,207,200.52	\$407,658.79
			31-361 CRHDC Rehab SF LH25			\$4,552,044.00	\$1,927,665.35	\$1,745,559.88	\$1,094,912.79	\$182,105.47
			11-361 CPLC Rehab SF LH25			\$6,652,312.00	\$1,561,093.47	\$1,449,083.83	\$804,198.29	\$112,009.64
			52-361 YES Rehab SF LH25			\$1,088,142.00	\$905,815.55	\$770,879.59	\$680,417.95	\$134,935.96
310	Financing	Homeownership Assistance to low and moderate-income	73-310 EPCUSO Financing LMMI			\$3,420,642.00	\$730,900.00	\$330,500.00	\$600,000.00	\$400,400.00
360	Aq&Rehab SF	Rehabilitation/reconstruction of residential structures	72-361 AHSTI Rehab SF			\$1,432,382.00	\$845,426.97	\$572,554.44	\$448,336.27	\$272,872.53



# Standard Reports: Performance (Perf)

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

This reports shows data from the latest DRGR Action Plan and all QPRs (regardless of QPR status) Note: Do not add performance measures across activity types

## **Perf Rept02b: CUM – Actual Accomplishments by Quarter HH and HU Only**

This reports shows data from the latest DRGR Action Plan and all QPRs (regardless of QPR status) Note: Do not add performance measures across activity types

## **Perf Rept03: QPR - Addresses by Activity and Responsible Organization**

This report is intended to show addresses across activities and QPRs. Each QPR normally only shows addresses entered in that report.

## **Perf Rept04b: ACTNPLN - Area Benefit Type Selected- Census vs Survey - Activity Level**

If Area Benefit is selected as the Benefit Type, this report lists activities by whether CENSUS data has been manually selected in DRGR or summary data has been entered using the SURVEY method

## **Perf Rept06: QPR - Direct Benefit Activities - Beneficiary Statistics by Household Type**

For direct benefit activities, this report shows the distribution of households and/or persons by race/ethnicity and Hispanic status

## **Perf Rept02a: CUM - Projected vs Cum Totals for Performance Measure Sorted by Resp Org and Activity Type**

This reports shows data from the latest DRGR Action Plan and all QPRs (regardless of QPR status) Note: Do not add performance measures across activity types

## **Perf Rept02c: QPR - Actual Accomplishments by Quarter**

This reports shows data from each QPRs (regardless of QPR status) and can be used to troubleshoot data entry problems. Note: Do not add performance measures across activity types

## **Perf Rept04a: ACTPLN - Beneficiary and Hsg Measure Types Selected - Activity Level**

This report shows the types of beneficiary measures selected for an activity: Direct vs. Area; Census vs. Survey; Households vs. Persons; Housing Units; SF and/or MF

## **Perf Rept05: ACTPLN - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level**

If an activity has been designated as area benefit- census method, this report shows the summary calculation and a list of the census counties, places, tracts and block groups for each activity.

## **Perf Rept09: ACTPLN - DREF Activity Budgets and Descriptions**

This report shows activities under Ike only grants which have performance measures entered for DREF

# Standard Reports: Performance (Perf Rept01)

Shared Reports   My Reports   History List   My Subscriptions   Create Report   Preferences   Search   Help   Logout										
Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number										
Home   Tools   Data   Grid   Format   Last update: 6/14/12 11:21:55 AM										
<b>REPORT DETAILS</b>										
Report Filter: (({Grants.Status} = Active) And ((({Activity Measure.Projected Quantity} > 0) Or ({QPR Measure.Actual Quantity} > 0)))										
PAGE-BY: Grantee:   Grant Number: B-08-MN-06-0512										
1 2 3 of 3 pages   Data rows: 1 - 50 of 130   Data columns: 6										
Activity Number△	Activity Type△	Responsible Organization△	Measure Type△	Measure Category△ Metrics	Low		Mod		Total	
					Projected▽	Actual▽	Projected▽	Actual▽	Projected▽	Actual▽
02 Homeownership Assistance - Walk-In Program	Homeownership Assistance to low- and moderate-income		# of Households		0	0	9	9	17	17
			# of Housing Units		0	0	0	0	17	17
			# of Singlefamily Units		0	0	0	0	17	17
			# Owner Households		0	0	9	9	17	17
03 Homeownership Assistance - RNLA	Rehabilitation/reconstruction of residential structures		# of Households		0	1	51	14	102	21
			# of Housing Units		0	0	0	0	102	21
			# of Singlefamily Units		0	0	0	0	102	21
			# Owner Households		0	1	51	14	102	21
			#Additional Attic/Roof Insulation		0	0	0	0	82	21
			#Clothes washers replaced		0	0	0	0	82	21
			#Dishwashers replaced		0	0	0	0	102	21
			#Efficient AC added/replaced		0	0	0	0	102	21
			#Energy Star Replacement Windows		0	0	0	0	1,000	208
			#High efficiency heating plants		0	0	0	0	102	21
			#Light fixtures (outdoors) replaced		0	0	0	0	408	83
			#Light Fixtures (indoors) replaced		0	0	0	0	1,326	263
			#Low flow showerheads		0	0	0	0	184	35
			#Low flow toilets		0	0	0	0	184	35
			#Refrigerators replaced		0	0	0	0	102	21
			#Replaced hot water heaters		0	0	0	0	102	21

# Modifying Reports

Common modifications users perform include:

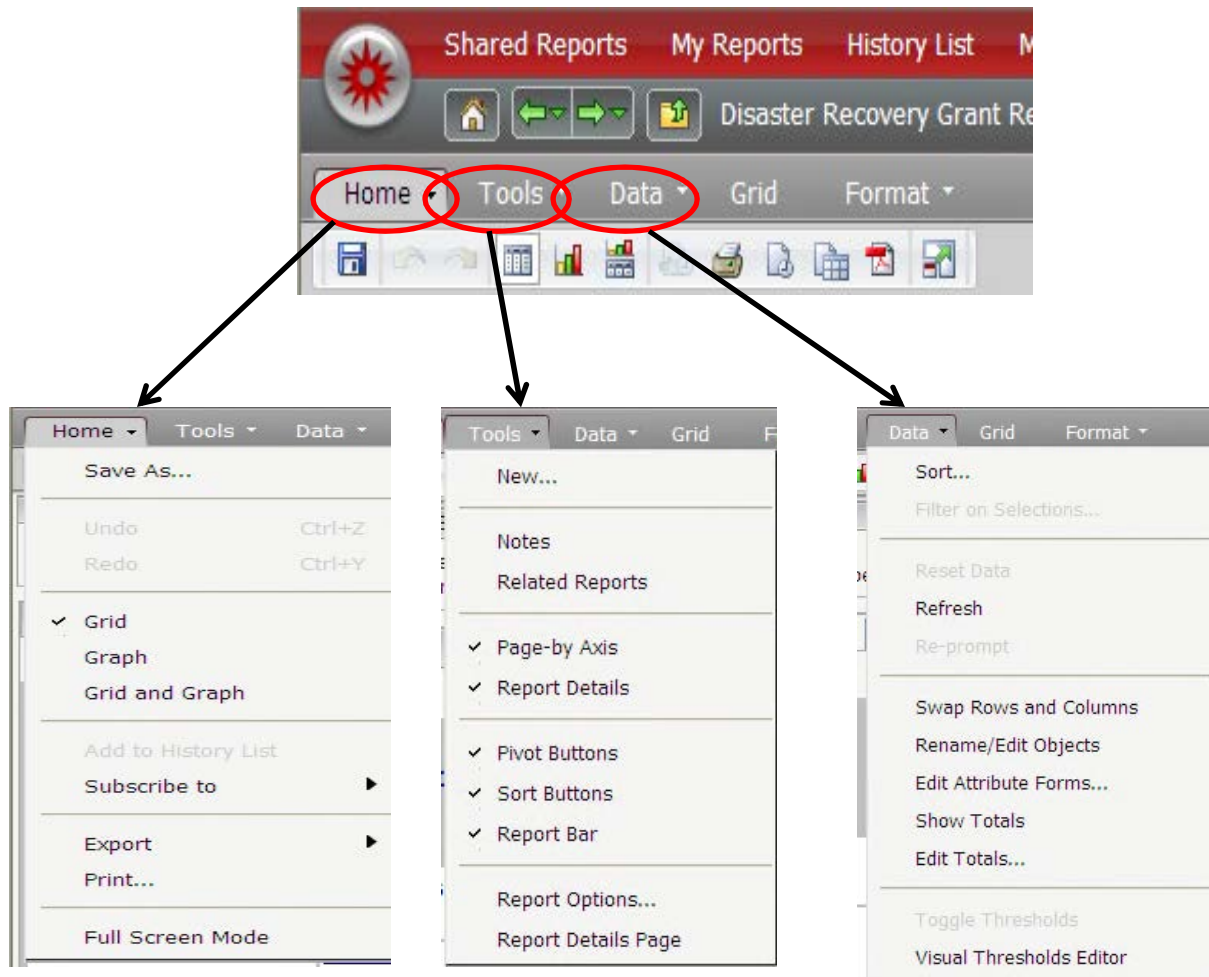
- Move and Sort Columns
- Grouping Columns
- Filtering Data

There are three ways to modify reports:

1. Use the drop-down menus and associated tool bars
2. Drag objects
3. Right click over the object for different options

# Modifying Reports

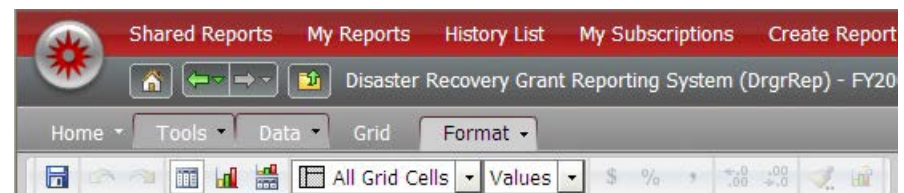
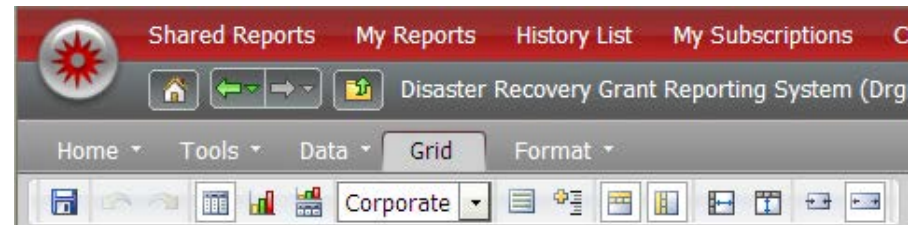
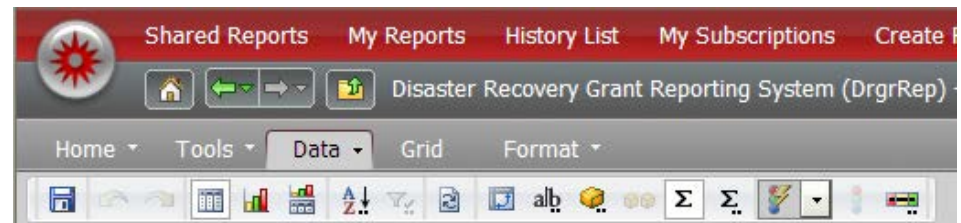
The different tabs show different icons (see next slide). The Home/ Tools/ and Data tabs also have drop-down menus. The Grid/ Format tabs have icons only.



# Modifying Reports

When you select one of the tabs the toolbar will change. Several icons are consistent across some or all tabs, while others are unique to that tab.

The first four icons (Save As, Grid display, Graph display and Grid and Graph display) are the same for each tab. Explore the other options at your office. The modifications will not be permanent.





# Modifying Reports: Moving Columns

Shared Reports   My Reports   History List   My Subscriptions   Create Report   Preferences   Search   Help   Logout									
Disaster Recovery Grant Reporting System (DrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number									
Home   Tools   Data   Grid   Format   Corporate   Last update: 6/18/12 6:29:09 PM									
REPORT DETAILS									
Report Filter: {{Grants.Status} = Active} And ((({Activity Measure.Projected Quantity} > 0) Or ({QPR Measure.Actual Quantity} > 0))									
PAGE-BY:   Grant Number: B-08-MN-06-0512									
Data rows: 1 - 50 of 130   Data columns: 6									
Activity Number△	Activity Type△	Responsible Organization△	Measure Type△	Measure Category△	Mod	Total			
					Projected▽	Actual▽	Projected▽	Actual▽	
02 Homeownership Assistance - Walk-In Program	Homeownership Assistance to low- and moderate-income		# of Households		9	9	17	17	
			# of Housing Units		0	0	17	17	
			# of Singlefamily Units		0	0	17	17	
			# Owner Households		9	9	17	17	
03 Homeownership Assistance - RNLA	Rehabilitation/reconstruction of residential structures		# of Households		0	1	51	14	102
			# of Housing Units		0	0	102	21	
			# of Singlefamily Units		0	0	102	21	
			# Owner Households		0	1	51	14	102
			#Additional Attic/Roof Insulation		0	0	82	21	
			#Clothes washers replaced		0	0	82	21	
			#Dishwashers replaced		0	0	102	21	
			#Efficient AC added/replaced		0	0	102	21	
			#Energy Star Replacement Windows		0	0	1,000	208	
			#High efficiency heating plants		0	0	102	21	
			#Light fixtures (outdoors) replaced		0	0	408	83	
			#Light Fixtures (indoors) replaced		0	0	1,326	263	
			#Low flow showerheads		0	0	184	35	
			#Low flow toilets		0	0	184	35	
			#Refrigerators replaced		0	0	102	21	
			#Replaced hot water heaters		0	0	102	21	

# Modifying Reports: Sorting Columns

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DrgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home Tools Data Grid Format

REPORT DETAILS

Report Filter:  
 ((Grants.Status) = Active) And (((Activity Measure.Projected Quantity) > 0) Or ((QPR Measure.Actual Quantity) > 0))

PAGE-BY: Grantee: Grant Number: B-08-MN-06-0512

Data rows: 1 - 50 of 130 | Data columns: 6

Activity Number	Activity Type	Responsible Organization	Measure Type	Measure Category	Mod	Total
					Projected	Actual
02 Homeownership Assistance - Walk-In Program	Homeownership Assistance to low- and moderate-income		# of Households		9	17
			# of Housing Units		0	17
			# of Singlefamily Units		0	17
			# Owner Households		9	17
03 Homeownership Assistance - RNLA	Rehabilitation/reconstruction of residential structures		# of Households	1	51	102
			# of Housing Units	0	0	102
			# of Singlefamily Units	0	0	102
			# Owner Households	1	51	102
			#Additional Attic/Roof Insulation	0	0	82
			#Clothes washers replaced	0	0	82
			#Dishwashers replaced	0	0	102
			#Efficient AC added/replaced	0	0	102
			#Energy Star Replacement Windows	0	0	1,000
			#High efficiency heating plants	0	0	102
			#Light fixtures (outdoors) replaced	0	0	408
			#Light Fixtures (indoors) replaced	0	0	1,326
			#Low flow showerheads	0	0	184
			#Low flow toilets	0	0	184
			#Refrigerators replaced	0	0	102
			#Replaced hot water heaters	0	0	102

# Modifying Reports: Sorting Columns

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

Disaster Recovery Grant Reporting System (DgrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05b: CUM - Program Income - Activity Level

Home Tools **Data** Grid Format

REPORT DETAILS

Report Filter:  
Empty Filter

PAGE-BY: Grant Status: Active Grantee: Grant Number: B-08-MN-06-0512

Data rows: 23 | Data columns: 5

Responsible Organization	Project Number	Project Title	Activity Type	Activity Number	Metrics	Total Budget (PI + PF)	Total Obligation (PI + PF)	Grant Funds Disbursed	Program Income Received	Program Income Disbursed
	003	Program Administration	Administration				\$3,286,087.00	\$1,922,612.67	\$0.00	\$232,543.97
	002	NSP Rental Housing	Rehabilitation/reconstruction of residential structures				\$748,061.17	\$694,080.83	\$0.00	\$0.00
							\$0.00	\$0.00	\$0.00	\$0.00
	001	NSP Homeownership	Homeownership Assistance and moderate-income				\$1,640,549.28	\$1,435,314.21	\$41,994.25	\$6,504.00
							\$244,294.72	\$244,294.72	\$0.00	\$0.00
							\$928,845.70	\$498,461.98	\$0.00	\$430,383.72
	002	NSP Rental Housing	Rehabilitation/reconstruction of residential structures	04 Rental Housing (1-4 units)		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				05 Rental Housing 25% set-aside (1-4 units)		\$6,409,287.60	\$5,654,632.51	\$3,916,823.03	\$215,823.76	\$615,713.27
	001	NSP Homeownership	Rehabilitation/reconstruction of residential structures	03 Homeownership Assistance - RNLA		\$15,582,460.98	\$14,937,380.39	\$12,449,754.72	\$3,605,070.58	\$1,709,997.48
				09 Homeownership RNLA 25% set-aside		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**SORT**

Row Column

1. Sort by: Program Income Received ☒ Ascending ☐ Descending

2. Then by: Program Income Disbursed ☒ Ascending ☐ Descending

3. Then by: Activity Number (DESC) ☒ Ascending ☐ Descending

Apply OK Cancel

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# Modifying Reports: Creating a Filter

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DgrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05b: CUM - Program Income - Activity Level

Home Tools Data Grid Format

REPORT DETAILS

Report Filter:  
Empty Filter

PAGE-BY: Grant Status: Active Grantee: Grant Number: B-08-MN-06-0512 **Activity Type**

Responsible Organization	Project Number	Project Title	Activity Type	Activity Number	Metrics	Total Budget (PI + PF)	Total Obligation (PI + PF)
	003	Program Administration	Administration	01 Program Administration		\$3,286,087.00	\$3,286,087.00
	002	NSP Rental Housing	Rehabilitation/reconstruction of residential structures	07 Rental-25% Somerville		\$748,061.17	\$748,061.17
				41 Rental-25% Project		\$1,500,000.00	\$0.00
	001	NSP Homeownership	Homeownership Assistance to low- and moderate-income	02 Homeownership Assistance - Walk-In Program		\$1,640,549.28	\$1,640,549.28
				08 Homeownership Walk-In 25% set-aside		\$244,294.72	\$244,294.72
				33 Homeownership Assistance - RNLA 203(k)		\$1,115,754.52	\$928,845.70
	002	NSP Rental Housing	Rehabilitation/reconstruction of residential structures	04 Rental Housing (1-4 units)		\$0.00	\$0.00
				05 Rental Housing 25% set-aside (1-4 units)		\$6,409,287.60	\$5,654,632.51
	001	NSP Homeownership	Rehabilitation/reconstruction of residential structures	03 Homeownership Assistance - RNLA		\$15,582,460.98	\$14,937,380.39
				09 Homeownership RNLA 25% set-aside		\$0.00	121 \$0.00

# Modifying Reports: Creating a Filter

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DrgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05b: CUM - Program Income - Activity Level

Home Tools Data Grid Format

REPORT DETAILS

Report Filter:  
Empty Filter

PAGE-BY: Grant Status: Active Grantee: Grant Number: B-08-MN-06-0512 Activity Type: Homeownership Assistance to low- and moderate-income

Responsible Organization△	Project Number▽	Project Title△	Activity Number△	Metrics	Total Budget (PI + PF)▽	Total Obligation (PI + PF)▽	Grant Funds Disbursed▽	Program Income Received
	001	NSP Homeownership	02 Homeownership Assistance - Walk-In Program		\$1,640,549.28	\$1,640,549.28	\$1,435,314.21	\$
			08 Homeownership Walk-In 25% set-aside		\$244,294.72	\$244,294.72	\$244,294.72	
			33 Homeownership Assistance - RNLA 203(k)		\$1,115,754.52	\$928,845.70	\$498,461.98	
<b>Total</b>					<b>\$3,000,598.52</b>	<b>\$2,813,689.70</b>	<b>\$2,178,070.91</b>	<b>\$</b>

# Modifying Reports: Grouping Columns (Example: Activity #)

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DgrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05b: CUM - Program Income - Activity Level

Home Tools Data Grid Format

REPORT DETAILS

Report Filter:  
Empty Filter

PAGE-BY: Grant Status: Active Grantee: Grant Number: B-08-MIN-06-0512 Activity Type: Rehabilitation/reconstruction of residential structures

Responsible Organization	Project Number	Project Title	Activity Number	Total Budget (PI + PF)	Total Obligation (PI + PF)	Grant Funds Disbursed	Project
	002	NSP Rental Housing	07 Rental Housing	\$748,061.17	\$748,061.17	\$694,080.83	
			41 Rental Housing	\$500,000.00	\$0.00	\$0.00	
	002	NSP Rental Housing	04 Rental Housing (1-4 units)	\$0.00	\$0.00	\$0.00	
			05 Rental Housing 25% set-aside (1-4 units)	\$6,409,287.60	\$5,654,632.51	\$3,916,823.03	
	001	NSP Homeownership	03 Homeownership Assistance - RNLA	\$15,582,460.98	\$14,937,380.39	\$12,449,754.72	
			09 Homeownership RNLA 25% set-aside	\$0.00	\$0.00	\$0.00	

123



# Modifying Reports: Grouping Columns (Example: Activity #)

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05b: CUM - Program Income - Activity Level

Home Tools Data Grid Format

REPORT DETAILS

Report Filter:  
Empty Filter

PAGE-BY: Grant Status: Active Grantee: Grant Number: B-08-MN-06-0512 Activity Type: Homeownership Assistance to low- and moderate-income

Responsible Organization	Project Number	Project Title	Activity Number	02 Homeownership Assistance - Walk-In Program					08 Homeownership Walk-In Program		
				Total Budget (PI + PF)	Total Obligation (PI + PF)	Grant Funds Disbursed	Program Income Received	Program Income Disbursed	Total Budget (PI + PF)	Total Obligation (PI + PF)	Grant Funds Disbursed
	001	NSP Homeownership		\$1,640,549.28	\$1,640,549.28	\$1,435,314.21	\$41,994.25	\$6,504.00	\$244,294.72	\$244,294.72	\$244,294.72
<b>Total</b>				\$1,640,549.28	\$1,640,549.28	\$1,435,314.21	\$41,994.25	\$6,504.00	\$244,294.72	\$244,294.72	\$244,294.72

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# Modifying Reports: Grouping Columns

## (Example: Organization)

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

Disaster Recovery Grant Reporting System (DrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home Tools Data Grid Format Last update: 6/18/12 6:29:09 PM

REPORT DETAILS


Report Filter:  
 ((Grants.Status) = Active) And (((Activity Measure.Projected Quantity) > 0) Or ((QPR Measure.Actual Quantity) > 0))

PAGE-BY: Grantee: Grant Number: B-08-MN-06-0512 Activity Type: Homeownership Assistance to low- and moderate-income

Data rows: 12 | Data columns: 6

Activity Number	Responsible	Measure Type	Measure Category	Low		Mod		Total	
				Projected	Actual	Projected	Actual	Projected	Actual
02 Homeownership Assistance - Walk-In Program		Units		0	0	9	9	17	17
		Units		0	0	0	0	17	17
		# of Singlefamily Units		0	0	0	0	17	17
		# Owner Households		0	0	9	9	17	17
08 Homeownership Walk-In 25% set-aside		# of Households		3	3	0	0	3	3
		# of Housing Units		0	0	0	0	3	3
		# of Singlefamily Units		0	0	0	0	3	3
		# Owner Households		3	3	0	0	3	3
33 Homeownership Assistance - RNLA 203(k)		# of Households		0	0	0	0	5	0
		# of Housing Units		0	0	0	0	5	0
		# of Singlefamily Units		0	0	0	0	5	0
		# Owner Households		0	0	0	0	5	0

# Modifying Reports: Grouping Columns (Example: Organization)

<div>  <a href="#">Shared Reports</a> <a href="#">My Reports</a> <a href="#">History List</a> <a href="#">My Subscriptions</a> <a href="#">Create Report</a> <a href="#">Preferences</a> </div> <div> <input type="text" value="Search"/> <a href="#">Help</a> <a href="#">Logout</a> </div>																																																																																																																																																										
Disaster Recovery Grant Reporting System (DrgRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number																																																																																																																																																										
Home Tools Data Grid Format <span>Last update: 6/18/12 6:29:09 PM</span>																																																																																																																																																										
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Report Filter: {{Grants.Status} = Active} And {{{Activity Measure.Projected Quantity} > 0} Or {{QPR Measure.Actual Quantity} > 0}}																																																																																																																																																										
PAGE-BY: Grantee: [ ] Grant Number: B-08-MIN-06-0512 Activity Type: Homeownership Assistance to low- and moderate-income																																																																																																																																																										
<table> <tr> <th rowspan="3">Activity Number<sup>△</sup></th><th rowspan="3">Measure Type<sup>△</sup></th><th rowspan="3">Measure Category<sup>△</sup></th><th colspan="7">Responsible Organization<sup>△</sup></th></tr> <tr> <th colspan="7">Housing Department</th></tr> <tr> <th colspan="2">Low</th><th colspan="2">Mod</th><th colspan="3">Total</th></tr> <tr> <th></th><th></th><th></th><th>Projected<sup>▽</sup></th><th>Actual<sup>▽</sup></th><th>Projected<sup>▽</sup></th><th>Actual<sup>▽</sup></th><th>Projected<sup>▽</sup></th><th>Actual<sup>▽</sup></th><th></th></tr> <tr> <td rowspan="4"><a href="#">02 Homeownership Assistance - Walk-In Program</a></td><td># of Households</td><td></td><td>0</td><td>0</td><td>9</td><td>9</td><td>17</td><td>17</td><td></td></tr> <tr> <td># of Housing Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>17</td><td>17</td><td></td></tr> <tr> <td># of Singlefamily Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>17</td><td>17</td><td></td></tr> <tr> <td># Owner Households</td><td></td><td>0</td><td>0</td><td>9</td><td>9</td><td>17</td><td>17</td><td></td></tr> <tr> <td rowspan="4"><a href="#">08 Homeownership Walk-In 25% set-aside</a></td><td># of Households</td><td></td><td>3</td><td>3</td><td>0</td><td>0</td><td>3</td><td>3</td><td></td></tr> <tr> <td># of Housing Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>3</td><td>3</td><td></td></tr> <tr> <td># of Singlefamily Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>3</td><td>3</td><td></td></tr> <tr> <td># Owner Households</td><td></td><td>3</td><td>3</td><td>0</td><td>0</td><td>3</td><td>3</td><td></td></tr> <tr> <td rowspan="4"><a href="#">33 Homeownership Assistance - RNLA 203(k)</a></td><td># of Households</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>5</td><td>0</td><td></td></tr> <tr> <td># of Housing Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>5</td><td>0</td><td></td></tr> <tr> <td># of Singlefamily Units</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>5</td><td>0</td><td></td></tr> <tr> <td># Owner Households</td><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>5</td><td>0</td><td></td></tr> </table>										Activity Number <sup>△</sup>	Measure Type <sup>△</sup>	Measure Category <sup>△</sup>	Responsible Organization <sup>△</sup>							Housing Department							Low		Mod		Total						Projected <sup>▽</sup>	Actual <sup>▽</sup>	Projected <sup>▽</sup>	Actual <sup>▽</sup>	Projected <sup>▽</sup>	Actual <sup>▽</sup>		<a href="#">02 Homeownership Assistance - Walk-In Program</a>	# of Households		0	0	9	9	17	17		# of Housing Units		0	0	0	0	17	17		# of Singlefamily Units		0	0	0	0	17	17		# Owner Households		0	0	9	9	17	17		<a href="#">08 Homeownership Walk-In 25% set-aside</a>	# of Households		3	3	0	0	3	3		# of Housing Units		0	0	0	0	3	3		# of Singlefamily Units		0	0	0	0	3	3		# Owner Households		3	3	0	0	3	3		<a href="#">33 Homeownership Assistance - RNLA 203(k)</a>	# of Households		0	0	0	0	5	0		# of Housing Units		0	0	0	0	5	0		# of Singlefamily Units		0	0	0	0	5	0		# Owner Households		0	0	0	0	5	0	
Activity Number <sup>△</sup>	Measure Type <sup>△</sup>	Measure Category <sup>△</sup>	Responsible Organization <sup>△</sup>																																																																																																																																																							
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	# of Housing Units		0	0	0	0	17	17																																																																																																																																																		
	# of Singlefamily Units		0	0	0	0	17	17																																																																																																																																																		
	# Owner Households		0	0	9	9	17	17																																																																																																																																																		
<a href="#">08 Homeownership Walk-In 25% set-aside</a>	# of Households		3	3	0	0	3	3																																																																																																																																																		
	# of Housing Units		0	0	0	0	3	3																																																																																																																																																		
	# of Singlefamily Units		0	0	0	0	3	3																																																																																																																																																		
	# Owner Households		3	3	0	0	3	3																																																																																																																																																		
<a href="#">33 Homeownership Assistance - RNLA 203(k)</a>	# of Households		0	0	0	0	5	0																																																																																																																																																		
	# of Housing Units		0	0	0	0	5	0																																																																																																																																																		
	# of Singlefamily Units		0	0	0	0	5	0																																																																																																																																																		
	# Owner Households		0	0	0	0	5	0																																																																																																																																																		

# Saving Reports: History List

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Fin Rept05c: Receipts by Project and Activity

Home Tools Data Grid Format

Save As... Undo Ctrl+Z Redo Ctrl+Y Close

CA Grant Number: Grant Program: NSP Appropriation: NSP

Data rows: 10 | Data columns: 1

Activity ID	Activity Title	Responsible Organization	Activity Type	Receipt Date	Status Metrics	Open Amount
	Financing Mechanism for First-Time Homebuyers		Homeownership Assistance to low- and moderate-income	3/31/2010		\$3,314.67
				6/30/2011		\$0.01
				12/12/2011		\$115,991.08
NSP-2A	Acquisition/Rehabilitation/Rental-City View Apts		Acquisition - general	12/31/2010		\$0.01
				6/30/2011		\$0.01
				3/31/2010		\$190,920.00
				6/30/2010		\$960,816.64
NSP-2B	Acquisition/Rehabilitation-LMMI		Acquisition - general	12/31/2010		\$160.76
				6/30/2011		\$150,727.57
				9/30/2011		\$0.01

0002 NSP Eligible Use B

Subscribe to History List...

# Saving Reports: 'My Reports'

Shared Reports My Reports History List My Subscriptions Create Report Preferences

Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Save As...

Save in: My Reports

- Admin Rept 03A: QPR - Report Status (Modified)
- Fin Rept: NSP Financial Report - Goal 1
- Fin Rept: Receipts by activity and project
- Fin Rept01b: Action Plan
- NSP Perf Rept Own Rent MF SF

5 item(s) found

Name: Perf Rept01: CUM - Projected vs Cum Total

Description: This reports shows data from the latest DRGR Action Plan and all QPRs (regardless of QPR status)

OK Cancel

Activity Number Measure Type

02 Homeownership Assistance - Walk-In Program

08 Homeownership Walk-In 25% set-aside

33 Homeownership Assistance - RNLA 203(k)

Activity Number	Measure Type	Total	Actual
02 Homeownership Assistance - Walk-In Program	# of Household	17	17
08 Homeownership Walk-In 25% set-aside	# of Housing I	17	17
33 Homeownership Assistance - RNLA 203(k)	# of Singlefan	17	17
	# Owner Hou	17	17
	# of Household	3	3
	# of Housing I	3	3
	# of Singlefan	3	3
	# Owner Hou	3	3
	# of Household	5	0
	# of Housing I	5	0
	# of Singlefan	5	0
	# Owner Hou	5	0



# Saving Reports: History List

The screenshot displays the Disaster Recovery Grant Reporting System (DgrRep) interface. The top navigation bar includes tabs for Shared Reports, My Reports, History List, My Subscriptions, Create Report, and Preferences. The breadcrumb trail indicates the current location: Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cumulative. The main menu is open, showing options like Save As..., Undo, Redo, Grid, Graph, Grid and Graph, Add to History List, Subscribe to, Export, Print..., and Full Screen Mode. The 'Subscribe to' option is highlighted, and its sub-menu is visible, showing 'History List...', 'E-mail...', 'File...', and 'Printer...'. The 'History List...' option is the target for saving the report's history.

Disaster Recovery Grant Reporting System (DgrRep) - FY2008 - 001A > Shared Reports > Standard Reports > Grantee User Reports > Perf Rept01: CUM - Projected vs Cumulative

Activity Measure.Projected Quantity > 0) Or ((QPR Measure.Actual Quantity) > 0))

Grant Number: B-08-MIN-06-0512

Activity Type	Responsible Organization	Measure Type	Measure Category
Partnership Assistance to low- and moderate-income		# of Households	
		# of Housing Units	
		# of Singlefamily Units	
		# Owner Households	
		# of Households	
		# of Housing Units	
		# of Singlefamily Units	
		# Owner Households	
		#Additional Attic/Roof Insulation	

# Subscribing to Reports

1. Click on link under report title
2. Select ADD SUBSCRIPTION (to History List, Email, File or Print)
3. Specify frequency for the report

**Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status**

Owner: Administrator  
Modified: 5/18/12 11:00:18 AM

This report shows system role and recertification status for grantee users. Grantee Admin users must be recertified by CPD representatives and other grantee users are certified by grantee admin users. Recertifications are required every six months.

[Subscriptions](#) [Export](#) [PDF](#)

**History List**

**Subscription Name**

You do not have any history list subscriptions

[Add history list subscription](#)

**Email**

**Subscription Name**

You do not have any email subscriptions

[Add email subscription](#)

**File**

**Subscription Name**

You do not have any file subscriptions

[Add file subscription](#)

**Print**

**Subscription Name**

You do not have any print subscriptions

[Add print subscription](#)

Shared Reports My Reports History List My Subsc

Disaster Recovery Grant Reporting

Subscription

**History List Subscription**

Name: Admin Rept04b: USERS - Grantee DF

Report: Admin Rept04b: USERS - Grantee DR Status

Schedule: Every Monday Morning

To: Every Monday Morning

First of Month

Monday Morning

☐ Run subscription immediately

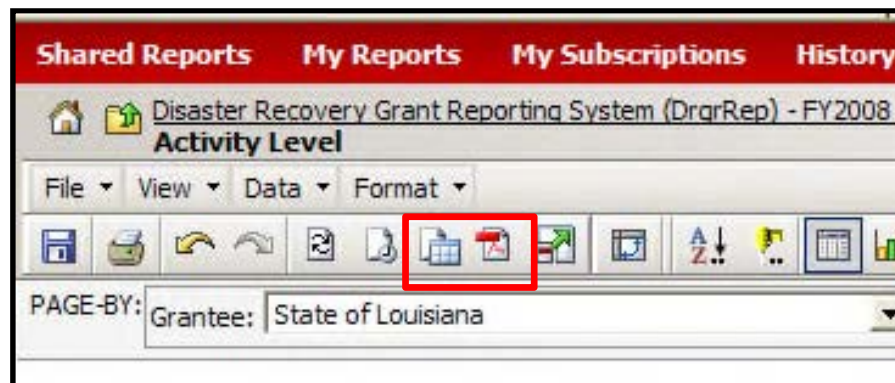
# Exporting Reports

- When to Export
  - When selecting the report (only access to one grant)



**Fin Rept07c: QPR - Fin Data by Activity and Quarter**  
**Owner:** Mark Mitchell  
**Modified:** 5/3/11 8:54:51 AM  
This report shows activity-level financial data entered or calculated by quarter. This can be used to troubleshoot data entry errors across quarters. Obligations entered from Jan 09 are updated amounts rather than incremental.  
[Subscriptions](#) [Export](#) [PDF](#)

- After modifying the report



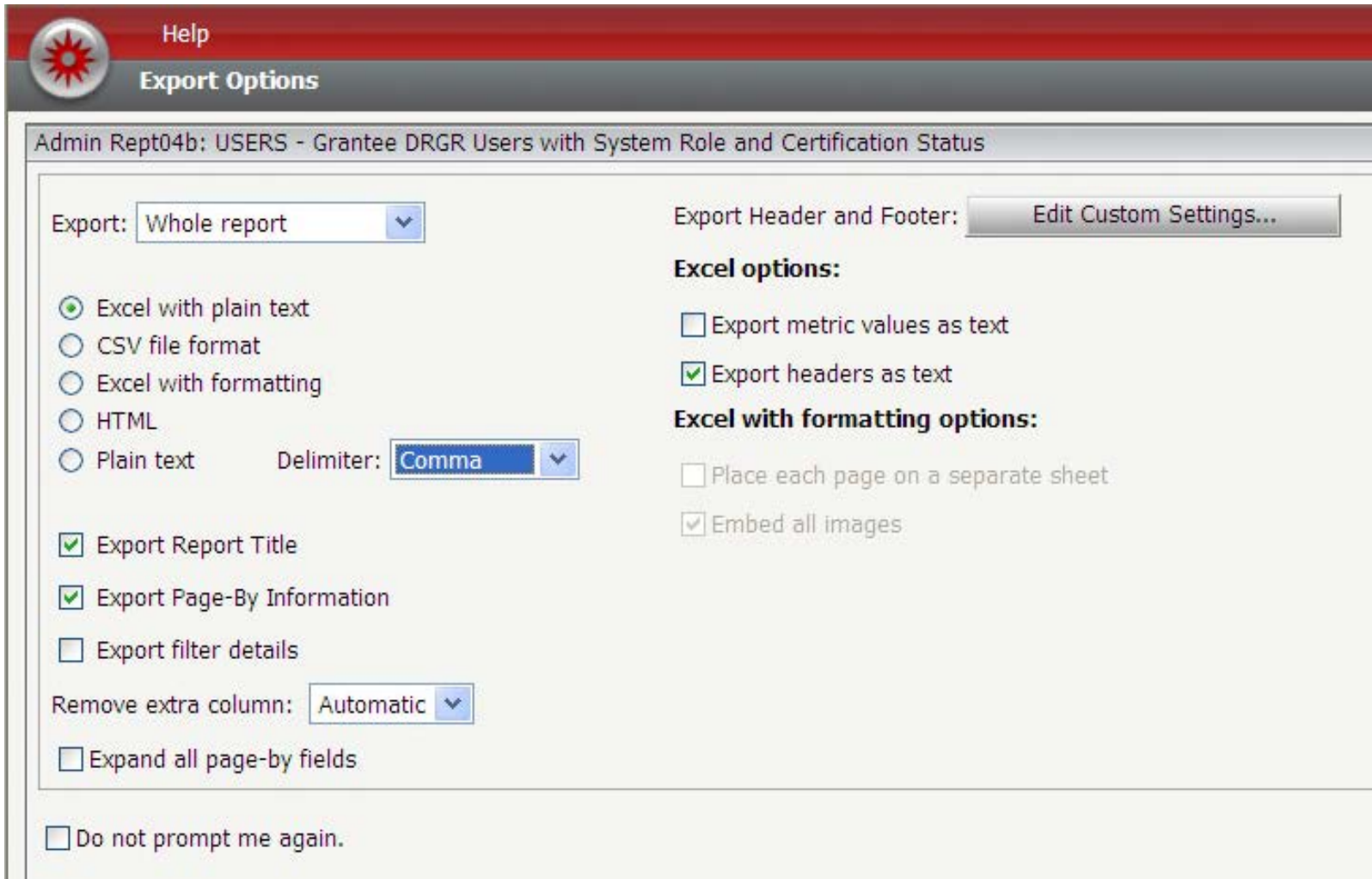
Shared Reports My Reports My Subscriptions History

Disaster Recovery Grant Reporting System (DrqrRep) - FY2008 - Activity Level

File View Data Format

PAGE-BY: Grantee: State of Louisiana

# Exporting Reports to Excel



Help

**Export Options**

Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status

Export: Whole report

☒ Excel with plain text

☐ CSV file format

☐ Excel with formatting

☐ HTML

☐ Plain text

Delimiter: Comma

☒ Export Report Title

☒ Export Page-By Information

☐ Export filter details

Remove extra column: Automatic

☐ Expand all page-by fields

Export Header and Footer: Edit Custom Settings...

**Excel options:**

☐ Export metric values as text

☒ Export headers as text

**Excel with formatting options:**

☐ Place each page on a separate sheet

☒ Embed all images

☐ Do not prompt me again.

# Public Reports: Quarterly Disbursements Analysis

## Category Detail by Grant

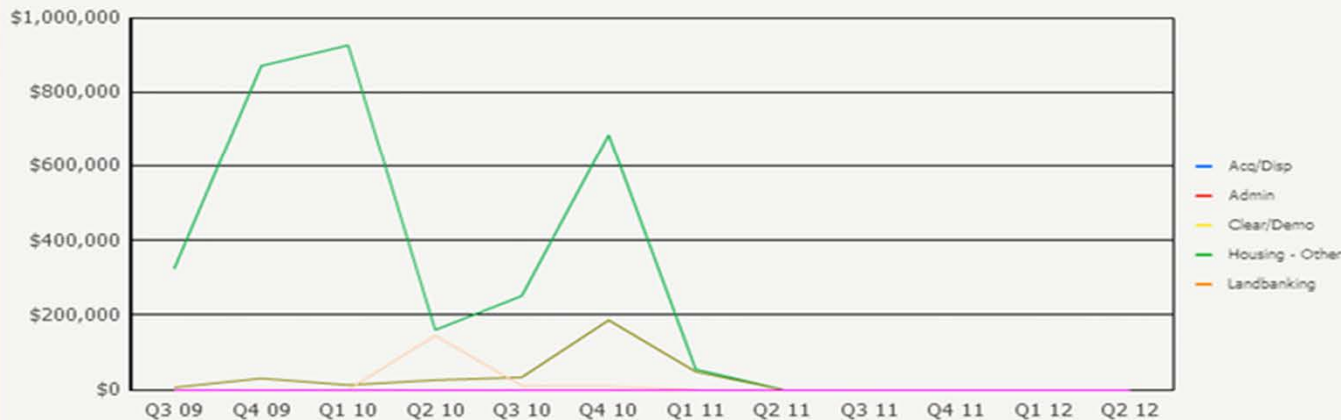
Grantee Type: Local Government

Grantee: Adams County, CO

Grant: B-08-UN-08-0001:Adams County, CO

Activity Category	Q3 09	Q4 09	Q1 10	Q2 10	Q3 10	Q4 10	Q1 11	Q2 11	Q3 11	Q4 11	Q1 12	Q2 12
Acq/Disp	\$324,686.83	\$870,090.37	\$925,788.93	\$160,215.31	\$250,747.54	\$684,524.92	\$54,355.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Admin	\$6,295.34	\$29,924.77	\$12,299.35	\$25,570.72	\$32,766.88	\$186,478.52	\$48,551.27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Clear/Demo	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Housing - Other	\$0.00	\$0.00	\$0.00	\$145,327.00	\$10,700.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Landbanking	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$330,982.17</b>	<b>\$900,015.14</b>	<b>\$938,088.28</b>	<b>\$331,113.03</b>	<b>\$294,214.42</b>	<b>\$881,003.44</b>	<b>\$102,906.36</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

NSP Quarterly Disbursement - Activity Category Detail by Grant

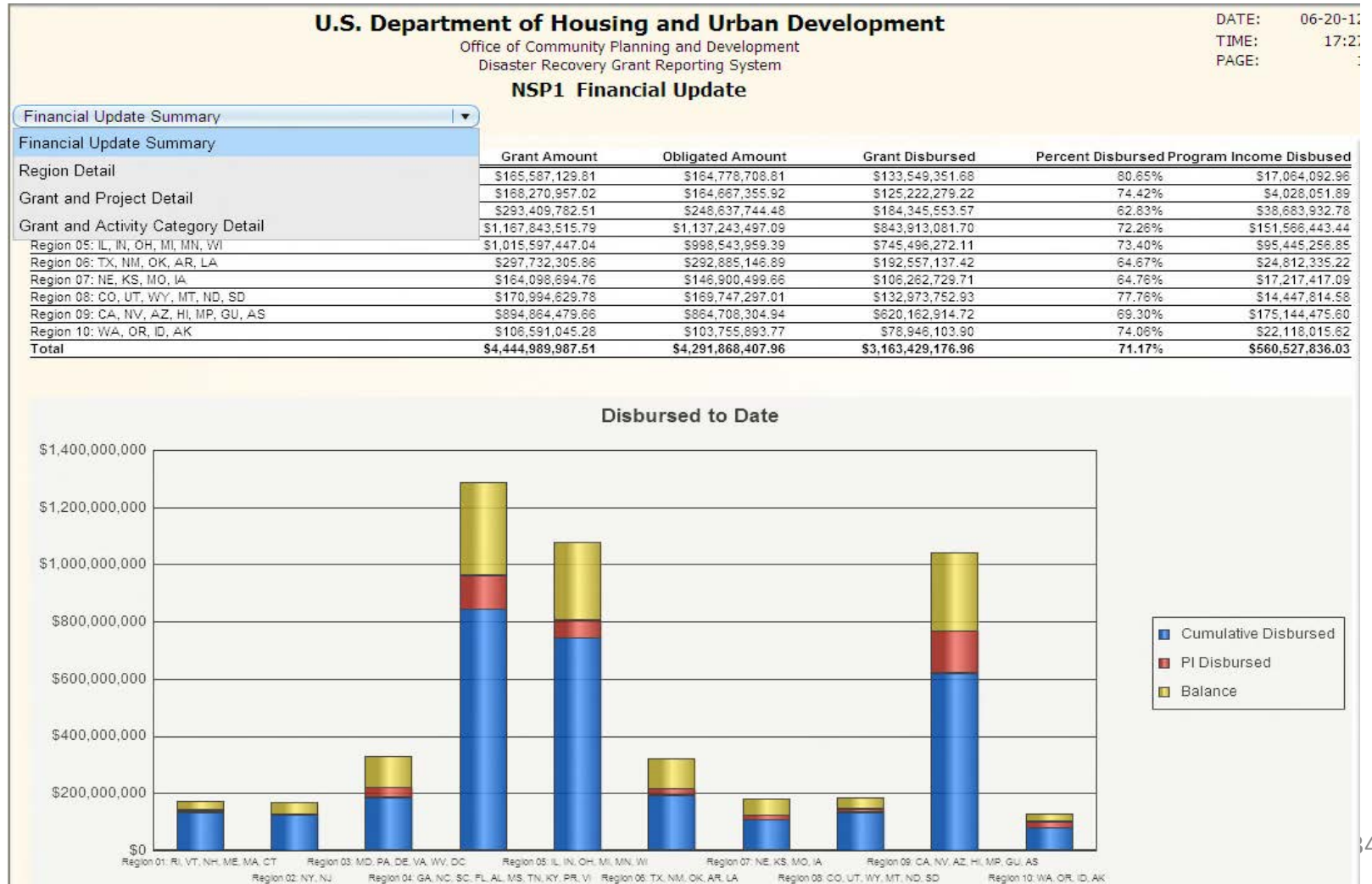


Please check any Activity Categories you would like displayed on the grid.

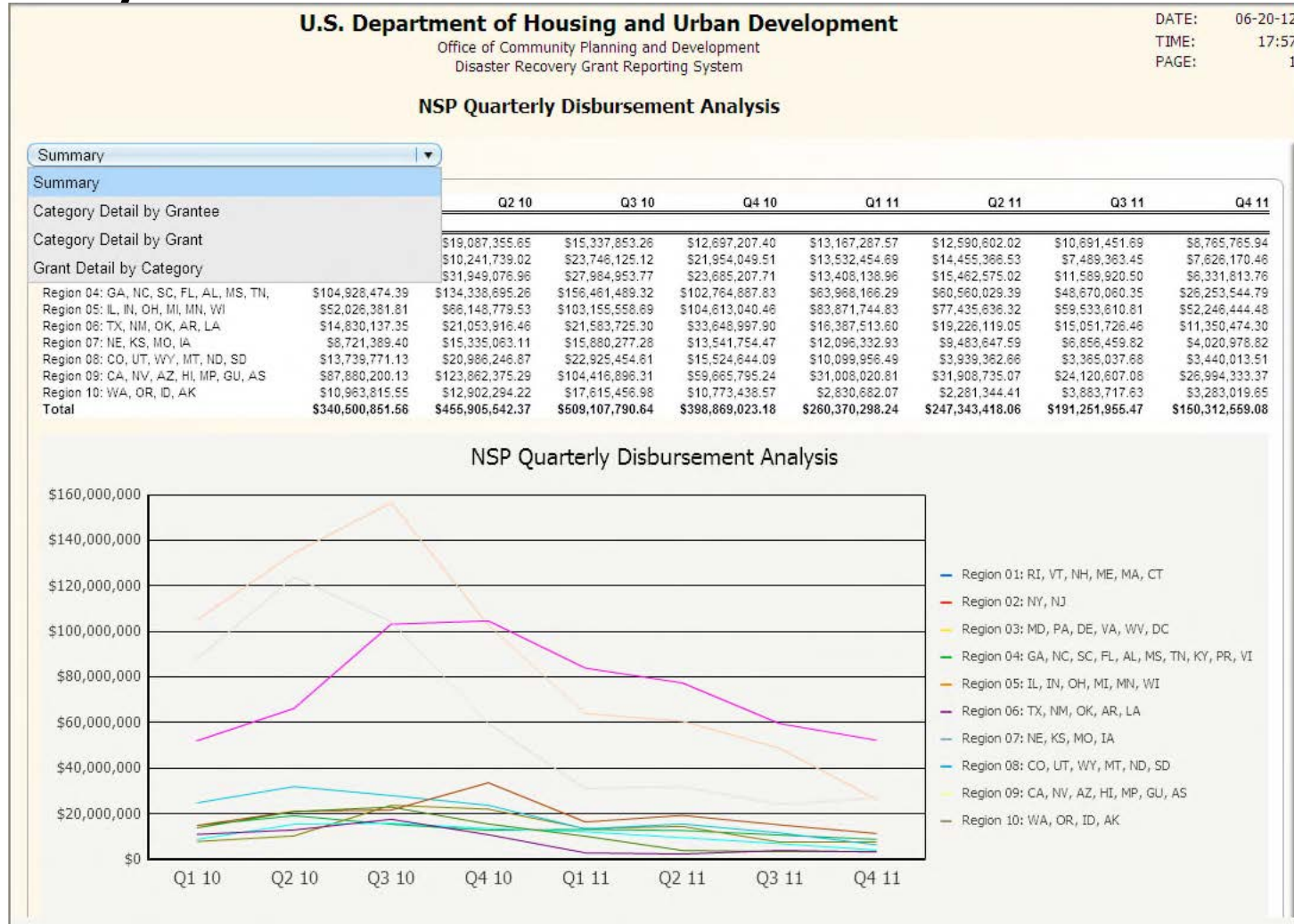
- ☒ (All)
- ☒ Acq/Disp
- ☒ Admin
- ☒ Clear/Demo
- ☒ Housing - Other
- ☒ Landbanking



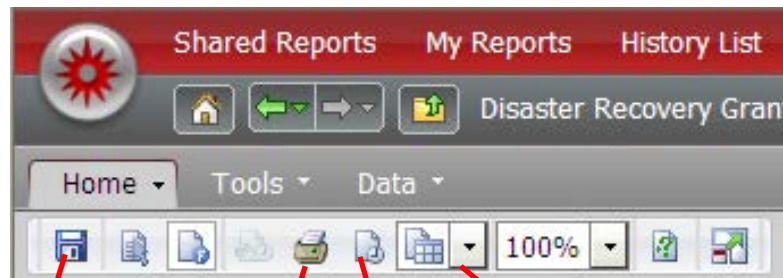
# Public Reports: Financial Update Dashboards



# Public Reports: Quarterly Disbursements Analysis



# Public Reports: How to Save



Save As will save this report to your My Reports folder

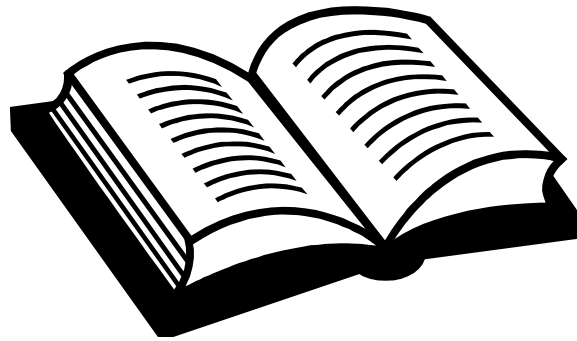
You can send this report directly to the printer

Schedule delivery to your History List

Export either as an Excel file or an Adobe pdf file



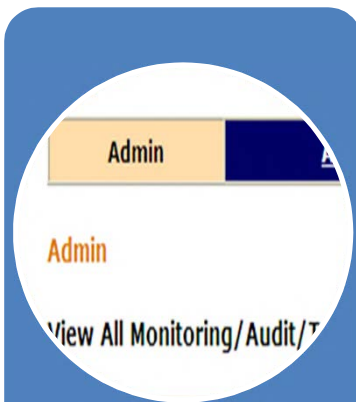
# Pull and Modify Reports



## Reports Review

- Do you know...
  - ...how to access reports?
  - ...how to modify reports?
  - ...how to export reports?
  - ...the difference between Shared Reports and My Reports?

# The Basics: DRGR Modules



## ***Admin***

Assign and certify users; add and track TA and Monitoring Events



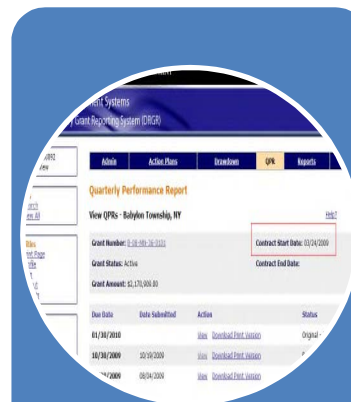
## ***Action Plans***

Identify activities to be funded by organization, activity type, and project.



## ***Drawdowns***

Obligate funds for draws; create, approve, edit vouchers; receipt program income



## ***QPRs***

Summarize drawdowns, expenditures, obligations, and achievements for the quarter



## ***Reports***

Look at financial, reporting, and user account information in an easy-to-read and exportable format