

eCon Planning Suite

e-Tutorial: Con Plan Goals and Accomplishments Report

Hello and welcome to the eCon Planning Suite online tutorials. This is one in a series of video tutorials demonstrating the functionality and components of the eCon Planning Suite.

At the end of this tutorial, you will be able to –

Use the Con Plan Goals and Accomplishments report from Microstrategy to help write your CAPER.

This report can also be used to track progress toward Con Plan and Annual Action Plan goals throughout the program year. Please keep in mind the following:

In order to use the CAPER Template in IDIS or the Con Plan Goals and Accomplishments Report, there must be an Action Plan entered in IDIS for the program year in which the CAPER is reporting with the status “Review Completed.” For example, if your 2013 action plan was paper-based, your 2013 CAPER will also be paper-based. If you submit your action plan via IDIS for program year 2014, you will use IDIS to create your 2014 CAPER. The one exception to this is for ESG grantees who must use a limited form of the CAPER template in IDIS, beginning with the FY2012 CAPER.

Today, we will demonstrate how to generate the Consolidated Plan Goals and Accomplishments Report from Microstrategy. From IDIS, click on Reports in the Main Menu. Along the left side, look for the Reports sub-menu and click View Reports. Microstrategy will open in a new tab or browser window.

To navigate to the Con Plan Goals and Accomplishments Report - first, click on the IDIS folder, then Shared Reports, then the Con Plan Reports and Dashboards folder, and finally on the Con Plan Goals and Accomplishments Report.

On the Attributes page, drill down through the grantee hierarchy until you see your grantee’s name. To select it, double click the name or click once and then on the blue arrow. Click the Run Document button at the bottom of the screen. On the next page, the system will list the versions of the Action Plans currently in IDIS. Select the version you want and click Run Document.

The system will generate and display the report. Use the Print tool to create a nicely formatted, printable version of the report. Alternatively, you can generate an Excel document that you can edit. The Con Plan Goals and Accomplishments Report summarizes the program year’s accomplishments into three sections. These sections correspond to the sections on the CR-(05) screen of the CAPER in which you must report out on program year accomplishments and accomplishments in meeting the 5-year strategic plan goals.

The report includes any accomplishments reported in IDIS for the selected program year. The system determines this differently for each of the programs. For CDBG and HOPWA, the system looks at the Program Year on the Accomplishment Detail page. For HOME, the system looks for activities with a completion date in the given year. ESG grantees do not report accomplishments in IDIS; ESG accomplishments will have to be inputted manually into the CAPER.

The first section summarizes the accomplishments for activities that were associated with a single strategic plan goal. The second section summarizes the accomplishments for activities that were

associated with more than one strategic plan goal. The third section summarizes accomplishments for the program year where the activity was not associated with a strategic plan goal.

Any projects and activities that were started before the grantee submitted their Action Plan via IDIS will be listed in this section. The purpose of this report is to help grantees summarize their accomplishments according to its Strategic Plan goals.

The first section does this for you automatically based on information already in the system. For the second and third sections, you need to manually assign these accomplishments to one of the Strategic Plan goals. Once you have combined the year's accomplishments into one table, you can use this report to update the CAPER template in the system.

This report can be run at any point during the program year. In addition to using it for your CAPER, you may also wish to use this information when assessing progress toward your Strategic Plan goals when developing each year's Annual Action Plan.

Thank you for participating in the online tutorial on using the Con Plan Goals and Accomplishments Report. For additional tutorials and resources, please go to the OneCPD Resource Library.