

MicroStrategy v 9.3 upgrade for IDIS Reporting

November 2013

Agenda

- Overview of new interface
- Execution of reports and common functionality
 - Export
 - Page-by
 - Totals & Sort
 - History List and Subscriptions
- New features
 - Live search / Quick search
 - Creating Personal View
 - Dynamic Visual Thresholds
 - Export individual grids/graphs from within your dashboards

Overview of new interface

- Continue to access reports from within the IDIS Online application



The screenshot shows the IDIS Login interface. On the left is a red sidebar with the 'Homes & Communities' logo and a navigation menu. The main content area has a red header for 'Community Planning & Development' and a white section for 'IDIS Login'. It includes a login instruction, a Username field with 'c04004', and a Password field with masked characters.

Homes & Communities
U.S. Department of Housing and Urban Development

Community Planning and Development

- ▼ IDIS
 - Log on to IDIS
 - Getting Started
 - Training
 - Reporting and Guidance

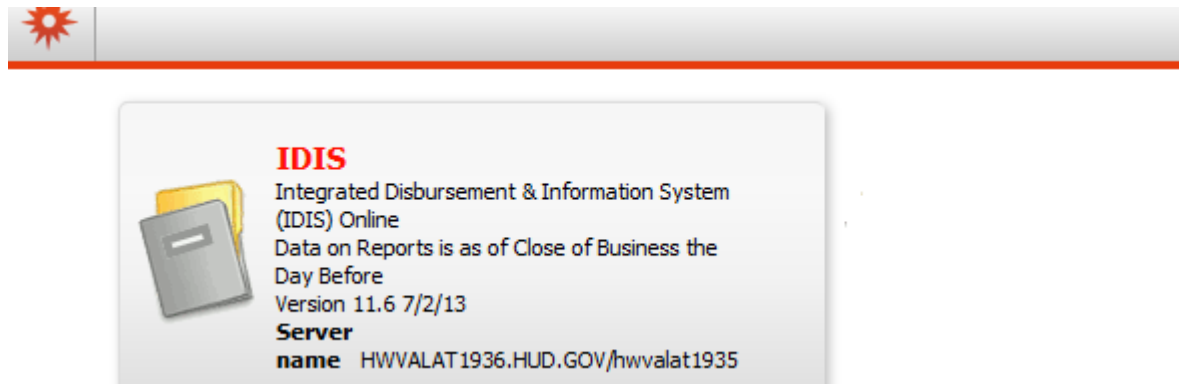
Community Planning & Development

IDIS Login


Please enter your Username (C*****, B***** or H*****) and Password to log in.

Username:

Password:



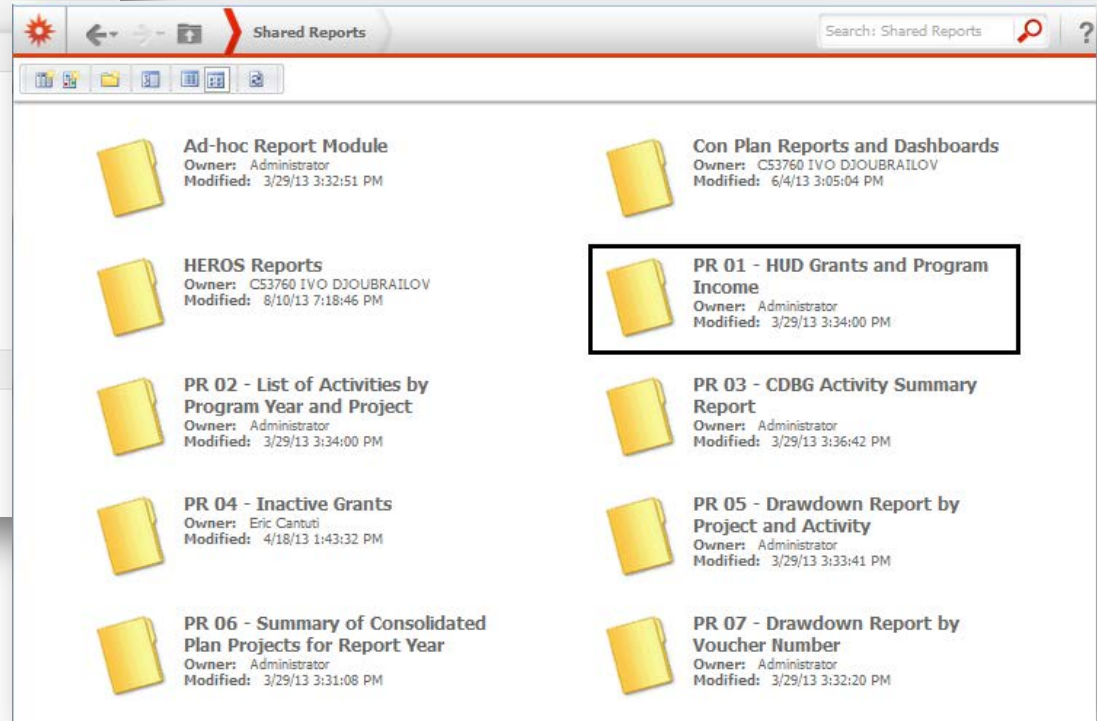
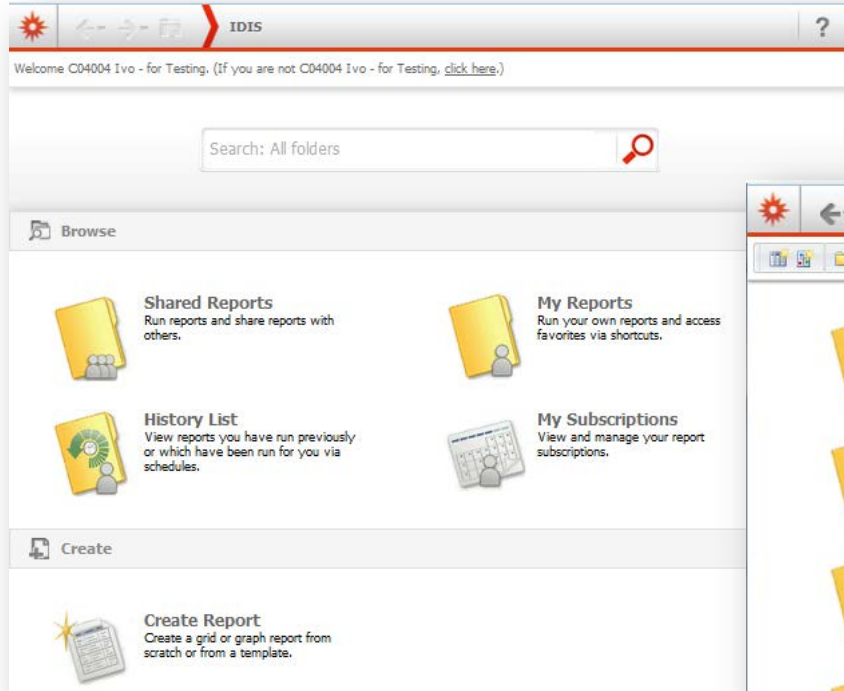
The footer block contains a sun icon, the IDIS logo, and system information including the full name of the system, data as of date, version number, and server name.



IDIS
Integrated Disbursement & Information System
(IDIS) Online
Data on Reports is as of Close of Business the Day Before
Version 11.6 7/2/13
Server
name HWVALAT1936.HUD.GOV/hwvalat1935

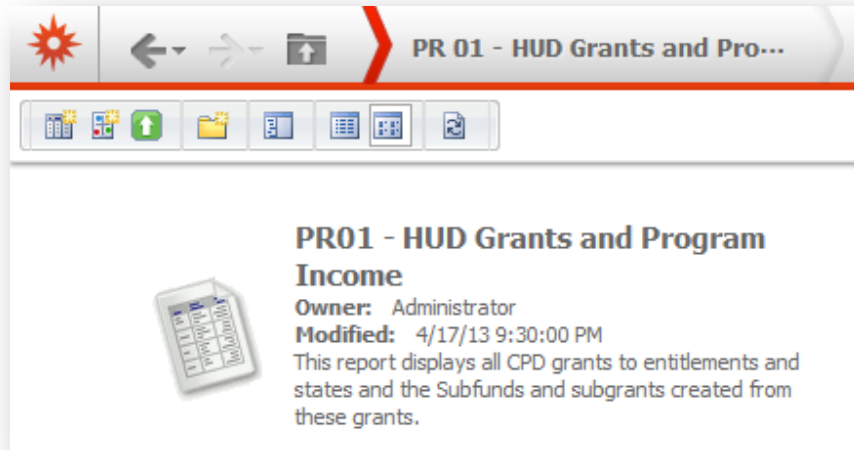
Overview of new interface

- Main subfolders remains the same
- Shared Reports, My Reports, History List, My Subscriptions



Overview of new interface

Streamlined 'Office-like' interface
requires hover over to reveal options



Click report icon to directly
execute the report

Hover mouse over report icon to
see additional run options:
Subscription, Export and PDF



Execution of reports and common functionality

To answer prompts - browse through Grantee Hierarchy OR search for a specific Grantee

The screenshot shows a software window titled "PR01 - HUD Grants and Program Income". Inside, there is a section titled "Choose from all attributes in the 'Prompted Grantee Hierarchy' hierarchy. (Required)". Below this, a search bar contains the text "ATLANTA" with a magnifying glass icon and a "Match case" checkbox. To the right of the search bar are four icons: a document, a close button (X), and two list view icons. Below the search bar, the "Available:" section shows a tree view with a red cube icon next to "ATLANTA" and a yellow cube icon next to "Prompted Grantee". Below "Prompted Grantee" are three items, each with a red cube icon: "377791:30901 DEVELC", "34544:A.P.P.L.E., INC", and "193307:ABBEVILLE". To the right of the "Available:" list is a "Selected:" list which contains the text "Prompted Grantee Select In List" and "37842:ATLANTA". A dashed line connects the "ATLANTA" item in the "Available:" list to the "37842:ATLANTA" item in the "Selected:" list. Navigation arrows are visible on the right side of the "Available:" list.

Execution of reports and common functionality

Click here to hide report location

Button to return to previous page

Drop-down menu is accessible from anywhere within the MicroStrategy project. Provides direct access to My Reports, Subscriptions page, and Preferences

Logout from Microstrategy

Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00
	B89MC130002	\$9,544,000.00	\$0.00	\$9,544,000.00	\$9,544,000.00
				\$95,000.00	\$9,095,000.00
				\$12,000.00	\$10,112,000.00
				\$26,817.00	\$11,226,817.00
				\$15,011.00	\$12,015,011.00
				\$27,000.00	\$13,227,000.00
	B95MC130002	\$13,524,000.00	\$0.00	\$13,524,000.00	\$13,524,000.00
	B96MC130002	\$13,138,000.00	\$0.00	\$13,138,000.00	\$13,138,000.00
	B97MC130002	\$12,785,000.00	\$0.00	\$12,785,000.00	\$12,785,000.00
	B98MC130002	\$12,130,000.00	\$0.00	\$12,130,000.00	\$12,130,000.00
		\$12,205,000.00	\$0.00	\$12,205,000.00	\$12,205,000.00
		\$12,072,000.00	\$0.00	\$12,072,000.00	\$12,072,000.00
		\$12,508,000.00	\$0.00	\$12,508,000.00	\$12,508,000.00

Execution of reports and common functionality

- New toolbar with both a list menu and icons

The screenshot shows a web-based report viewer. At the top is a breadcrumb trail: IDIS > Shared Reports > PR 01 - ... PR01 - HUD Grants and Progr... A search bar on the right says 'Search: All folders' with a magnifying glass icon. Below the breadcrumb is a menu bar with 'Home', 'Tools', 'Data', 'Grid', and 'Format'. A red arrow points from the 'Home' menu item to a callout box that says 'Home Menu bar. Can be accessed through drop-down list'. Below the menu bar is a toolbar with various icons. A black box highlights the first seven icons, with a callout box pointing to it that says 'Export to Excel, CSV, HTML, Plain text'. Individual callout boxes point to specific icons: 'Save As..' for the first icon, 'Add To History List' for the second, 'Create Personal View' for the third, 'Print' for the fourth, and 'Export to PDF' for the fifth. The main content area displays a table with the following data:

am	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
CDBG	ZN	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00
			B86MC130003	\$0.00	\$0.00	\$0.00	\$0.00

Page navigation controls show '1 2 3 4 of 4 pages'. The text 'Data rows: 1' is in the top right corner of the table area.

Execution of reports and common functionality

Tools Menu

Home ▾ Tools ▾ Data ▾ Grid ▾ Format ▾

Last update: 8/12/13 11

◀ ◀ 1 2 3 4 of 4 pages ▶ ▶

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
CDBG	EN	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00

View Filter

Show Report details

Show Prompt details

Convert to graph

Show Pivot buttons

Show sort buttons

Threshold Editor

Data Menu

Home ▾ Tools ▾ Data ▾ Grid ▾ Format ▾

Last update: 8/12/13 11

◀ ◀ 1 2 3 4 of 4 pages ▶ ▶

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
CDBG	EN	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00

Threshold Editor

Execution of reports and common functionality

Grid Menu

Home Tools Data **Grid** Format

Apply Banding

Enable outline mode

Merge Column headers

Merge row headers

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
CDBG	EN	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00

Format Menu

Menu to format Metric values



Home Tools Data Grid **Format**

Values \$ % ,

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount
CDBG	EN	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00
			B89MC130002	\$9,544,000.00	\$0.00	\$9,544,000.00	\$9,544,000.00
			B90MC130002	\$9,095,000.00	\$0.00	\$9,095,000.00	\$9,095,000.00

Page-by & Export

Home ▾ Tools ▾ Data ▾



 100%

GROUPING: Fiscal Year: 2012 ▾ Pro DBG ▾ Grant Number: B12MC240010 ▾ Fund Type Code: PI ▾ Transaction: (All) ▾

Report for Program:1/ Voucher Dates:03 to

Fiscal Year	Program	Grant Number	Fund Type	Estimated Income for Year	Transaction	Voucher #	Voucher Created	Voucher Type	IDIS Proj. ID	IDIS Actv. ID	Matrix Code
2012	CDBG	B12MC240010	PI	49,118.77	RECEIPTS						
						5088258-001	03-19-13		47	7267	05
						5088262-001	10-17-12		79	7300	21B
						5095961-001	01-22-13		80	7301	05L
						5095962-001	01-22-13		80	7301	05L
							01-22-13		47	7267	05
							02-27-13		113	6461	14H
							02-27-13		113	6461	14H
							02-27-13		86	7307	21H
							03-21-13		52	7012	20

Export into Excel or PDF

Page-by list makes viewing a report easier, users do not have to scroll through long list of data and can quickly filter by the selected element

How to add to page-by

- Any attribute can be added to the page-by axis

PR01 - HUD Grants and Program Income

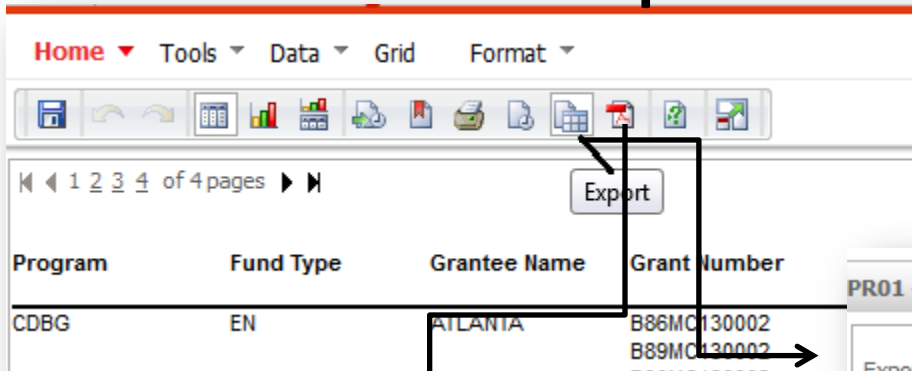
Home ▾ Tools ▾ Data ▾ Grid Format ▾

PAGE-BY: none

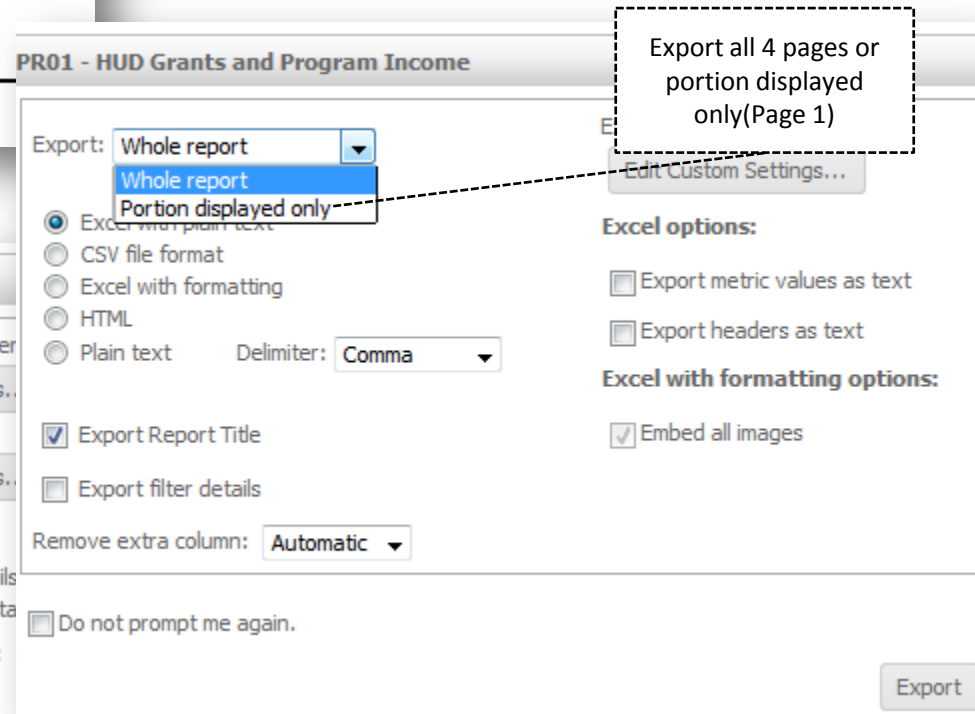
Right Click on 'Program' > Move > To Page-by Axis

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commi
CDBG	Sort	ATLANTA	B86MC130002	\$9,596,000.00	\$0.00	\$9,596,000.00	\$9,596,000.00	\$0.00
			B89MC130002	\$9,544,000.00	\$0.00	\$9,544,000.00	\$9,544,000.00	\$0.00
			B90MC130002	\$9,095,000.00	\$0.00	\$9,095,000.00	\$9,095,000.00	\$0.00
			B91MC130002	\$10,112,000.00	\$0.00	\$10,112,000.00	\$10,112,000.00	\$0.00
			002	\$11,226,817.00	\$0.00	\$11,226,817.00	\$11,226,817.00	\$0.00
			002	\$12,015,011.00	\$0.00	\$12,015,011.00	\$12,015,011.00	\$0.00
			002	\$13,227,000.00	\$0.00	\$13,227,000.00	\$13,227,000.00	\$0.00
			002	\$13,524,000.00	\$0.00	\$13,524,000.00	\$13,524,000.00	\$0.00
			002	\$13,138,000.00	\$0.00	\$13,138,000.00	\$13,138,000.00	\$0.00
			002	\$12,785,000.00	\$0.00	\$12,785,000.00	\$12,785,000.00	\$0.00
			002	\$12,130,000.00	\$0.00	\$12,130,000.00	\$12,130,000.00	\$0.00
			002	\$12,205,000.00	\$0.00	\$12,205,000.00	\$12,205,000.00	\$0.00
			002	\$12,072,000.00	\$0.00	\$12,072,000.00	\$12,072,000.00	\$0.00
			B01MC130002	\$12,508,000.00	\$0.00	\$12,508,000.00	\$12,508,000.00	\$0.00
			B02MC130002	\$12,297,000.00	\$1,264,950.00	\$11,032,050.00	\$11,032,050.00	\$0.00
			B03MC130002	\$11,467,016.00	\$0.00	\$11,467,016.00	\$11,467,016.00	\$0.00
B04MC130002	\$11,284,000.00	\$0.00	\$11,284,000.00	\$11,284,000.00	\$0.00			
B05MC130002	\$10,681,626.00	\$0.00	\$10,681,626.00	\$10,681,626.00	\$0.00			
B06MC130002	\$9,126,595.00	\$1,846,794.00	\$7,279,801.00	\$7,279,801.00	\$0.00			

Export

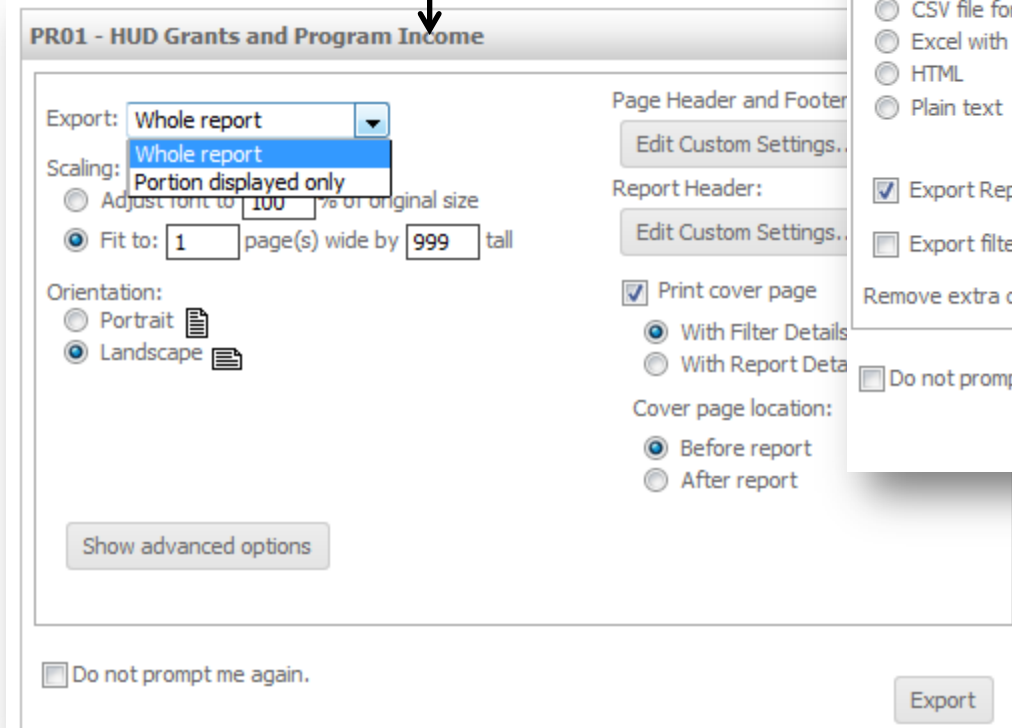


Excel & other options



Export all 4 pages or
portion displayed
only(Page 1)

PDF Options



Totals

PR01 - HUD Grants and Program Income

Home ▾ Tools ▾ Data ▾ Grid Format ▾

Enable or disable totals

Custom subtotal

PAGE-BY: Program: HESG

Fund Type	Grant	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available to Draw
EN	ATL	E11MC130002	\$531,333.00	\$39,849.00	\$491,484.00	\$490,981.70	\$0.00	\$502.30
		E12MC130002	\$607,715.00	\$45,578.00	\$562,137.00	\$518,640.03	\$0.00	\$43,496.97
		E13MC130002	\$567,371.00	\$0.00	\$0.00	\$0.00	\$567,371.00	\$567,371.00
		ATLANTA Subtotal:	\$1,706,419.00	\$85,427.00	\$1,053,621.00	\$1,009,621.73	\$567,371.00	\$611,370.27
	EN Subtotal:		\$1,706,419.00	\$85,427.00	\$1,053,621.00	\$1,009,621.73	\$567,371.00	\$611,370.27
GRANTEE TOTALS			\$1,706,419.00	\$85,427.00	\$1,053,621.00	\$1,009,621.73	\$567,371.00	\$611,370.27
AD	ATLANTA	E11MC130002	\$39,849.00	\$0.00	\$39,849.00	\$39,849.00	\$0.00	\$0.00
		E12MC130002	\$45,578.00	\$0.00	\$45,578.00	\$18,354.87	\$0.00	\$27,223.13
		E13MC130002	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		ATLANTA Subtotal:	\$85,427.00	\$0.00	\$85,427.00	\$58,203.87	\$0.00	\$27,223.13

Disabled subtotal

PAGE-BY: Program: HESG

Data rows: 6 | Data columns: 9

Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available to Draw
EN	ATLANTA	E12MC130002	\$607,715.00	\$45,578.00	\$562,137.00	\$518,640.03	\$0.00	\$43,496.97
		E13MC130002	\$567,371.00	\$0.00	\$0.00	\$0.00	\$567,371.00	\$567,371.00
		E11MC130002	\$531,333.00	\$39,849.00	\$491,484.00	\$490,981.70	\$0.00	\$502.30
AD	ATLANTA	E12MC130002	\$45,578.00	\$0.00	\$45,578.00	\$18,354.87	\$0.00	\$27,223.13
		E11MC130002	\$39,849.00	\$0.00	\$39,849.00	\$39,849.00	\$0.00	\$0.00
		E13MC130002	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Totals – Advanced Totals

Home Tools Data Grid Format

Report Details
Report Filter:
(ApplyComparison("#0 = #1 and #2 and #3=#4", (Prompted Grantee) (ID), (Recip Grantor))

Prompt Details
Prompt 1: Choose from all attributes in the 'Prompted Grantee Hierarchy' hierarchy.
(Field Office) = ATLANTA

Subtotals Editor

Definitions Advanced Display

#1 Subtotal:

☐ By Position Rows: None Columns: None Pages: All Subtotals

☒ Across Level Select Levels:

- ☐ Program
- ☐
- ☐ Fund Type
- ☒ Grantee Name
- ☒ Grant Number

Program	Fund Type	Grantee Name	Grant Number
CDBG	EN	ALBANY	B89MC130001
			B90MC130001
			B91MC130001
			B92MC130001
			B93MC130001
			B94MC130001
			B95MC130001
			B96MC130001
			B97MC130001
			B98MC130001
			B99MC130001
			B00MC130001
			B01MC130001
			B02MC130001
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			B00MC130001
			B01MC130001
			B02MC130001
			B03MC130001
			B04MC130001
			B05MC130001
			B06MC130001
			B07MC130001
			B08MC130001
			B09MC130001

Advanced totals allow users to change the level of aggregation of the totals across the attributes.
Example: set the total from the Grantee level to Fund Type level

Home ▾ Tools ▾ Data ▾ Grid Format ▾

Prompt 1: Choose from all attributes in the Prompted Grantee hierarchy
{Field Office} = ATLANTA

PAGE-BY: Grantee Name: ALBANY

◀ 1 2 3 of 3 pages ▶▶

Program ▲	Fund Type ▲	Grant Number ▲
CDBG	EN	B89MC130001
		B90MC130001
		B91MC130001
		B92MC130001
		B93MC130001
		B94MC130001
		B95MC130001
		B96MC130001
		B97MC130001
		B98MC130001
		B99MC130001
		B00MC130001
		B01MC130001
		B02MC130001
		B03MC130001
		B04MC130001
		B05MC130001
		B06MC130001
		B07MC130001
		B08MC130001
	B09MC130001	
	B10MC130001	
	B11MC130001	
	B12MC130001	
AD		B11MC130001
		B12MC130001

Subtotal:
AD

\$755,278.00	\$269,879.15	\$361,384.37	\$126,063.12
\$36,065,117.00	\$653,003.71	\$35,288,098.81	\$35,052,777.12
\$383,124.56	\$0.00	\$383,124.56	\$383,124.56
\$269,879.15	\$0.00	\$269,879.15	\$255,879.15

Subtotals Editor

Definitions
Advanced
Display

#1 Subtotal: ▼

☐ By Position

☒ Across Level

Rows: None ▼

Columns: None ▼

Pages: All Subtotals ▼

Select Levels:

☐ Program

☒ Fund Type

☐ Grant Number

☐ Grantee Name

Apply

Sorting

PR01 - HUD Grants and Program Income

Search: All folders

Home Tools Data Grid Format

1 2 3 4 of 4 pages

Show sort buttons

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Ne An
CDBG	RL	ATLANTA	B02MC130002	\$266,544.70	\$0.00	\$122,158.01	\$21
			B03MC130002	\$338,249.11	\$0.00	\$338,249.11	\$3
			B04MC130002	\$139,459.71	\$0.00	\$139,459.71	\$1:
			B05MC130002	\$119,830.49	\$0.00	\$119,830.49	\$1:
			B06MC130002	\$47,530.99	\$0.00	\$47,530.99	\$:
			B07MC130002	\$156,602.63	\$0.00	\$156,354.93	\$
		ATLANTA Subtotal:		\$1,068,215.63	\$0.00	\$923,683.24	\$0:
		LAREDO					

Sort

Insert Metric

Move

Filter On...

✕ Remove from Grid

Advanced formatting...

Rename/Edit...

Attribute Forms

Derived Elements...

Any field with a sort icon can be used to sort.

Also available by right click

History list

- During report execution users can send requests to History list

The image shows two screenshots from a software application. The top screenshot is a 'Processing request' dialog box for a report titled 'PR 09 - Program Income Detail Report by Fiscal Year and Program'. It shows the document is 'Running datasets'. A dashed box labeled 'Link to send the report to History List' points to the 'Add to my History List' button. The bottom screenshot is the 'History List' window, which displays a table of report execution history. A dashed box labeled 'Execution Status' points to the 'Running datasets' status in the table. Another dashed box labeled 'Report Export options' points to the export icons in the table row.

Processing request.

Document name: PR 09 - Program Income Detail Report by Fiscal Year and Program
Current status: Running datasets

Please wait or choose one of the following actions:

Check status again | [Add to my History List](#) | Show document details | Cancel

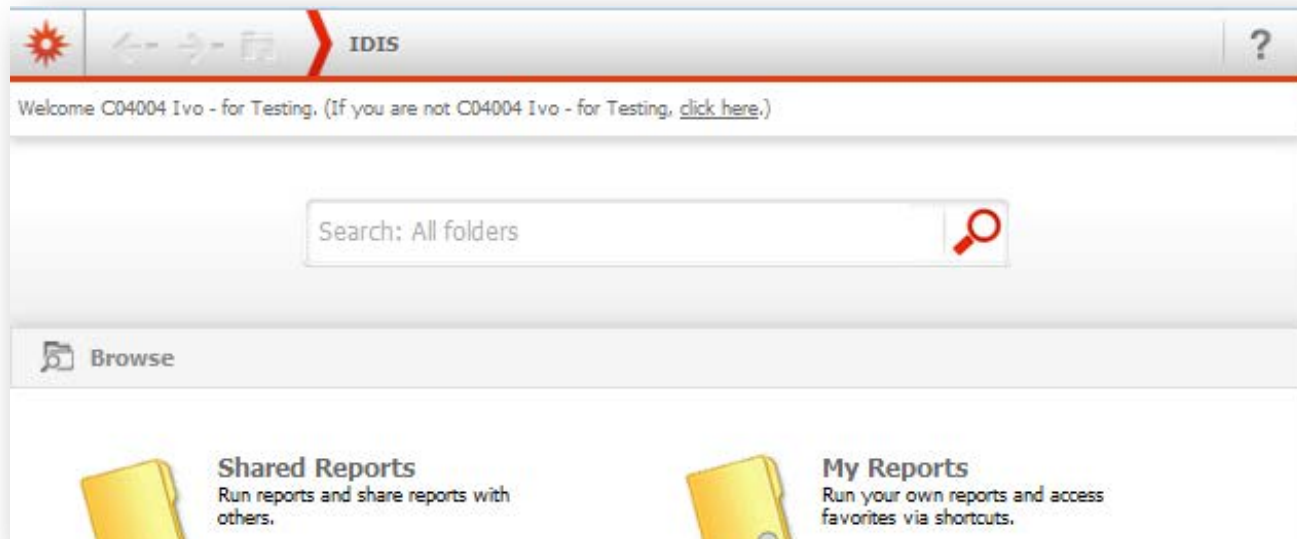
History List

Search: All folders

Name	Status	Message Creation Time	Remove
PR 09 - Program Income Detail Report by Fiscal Year and Program	Running datasets	8/11/13 4:43:23 PM	Export Options

New features: Live Search / Quick search

- Provides search suggestions as user is typing
- Supports auto-complete option while typing and displays the search results in real time
- Can be accessed from project landing page or search option on the top navigation bar
- Reports can be executed directly from search results without project folder browsing





Quick search

Provides search results with suggestions as user types

Search results

PR 09 - Program income detail report by fiscal

Results

- PR 09 - Program Income Detail Report by Fiscal Year and Program
- PR 09 - Program Income Detail Report by Fiscal Year and Program
- PR 09 - Program Income Detail Report by Fiscal Year and Program
- Program Production by Fiscal Year
- 5 - PR20 - Program Production by Fiscal Year
- PR 34 - States of OE Funds by Fiscal Year
- PR 34 - States of OE Funds by Fiscal Year
- PR 09 - RECEIPT
- PR 09 - DRAWN
- PR 25 - Status of CHDO Funds by Fiscal Year Report

Suggestions

- pr 09 - program income detail report by fiscal year and program

Mouse-over to see each report location

IDIS > Public Objects > Shared Reports > PR 09 - Program Income Detail Report by Fiscal Year and Program > PR 09 - Program Income Detail Report by Fiscal Year and Program

Browse

Shared Reports
Run reports and share with others.

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

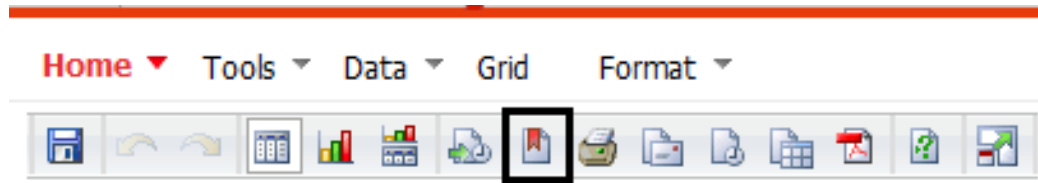
My Reports
Run your own reports and access favorites via shortcuts.

Subscriptions
View and manage your report subscriptions.



Personal View

- Allows user to customize a report or a document and save the customized report display in their personal view. Using personal views allows different users to display the report using their preferred report layout.
- Personal View menu is located under Home Menu bar





Creating Personal View - Example

Step 1: Execute report

Program	Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Draw Amou
CDBG	EN	ALBUQUERQUE	B88MC350001	\$3,578,000.00	\$0.00	\$3,578,000.00	\$3,578,000.
			B89MC350001	\$3,725,000.00	\$0.00	\$3,725,000.00	\$3,725,000.
			B90MC350001	\$3,565,000.00	\$0.00	\$3,565,000.00	\$3,565,000.
			B91MC350001	\$3,984,000.00	\$0.00	\$3,984,000.00	\$3,984,000.
			B92MC350001	\$4,206,000.00	\$0.00	\$4,206,000.00	\$4,206,000.
			B93MC350001	\$5,112,000.00	\$0.00	\$5,112,000.00	\$5,112,000.
			B94MC350001	\$5,561,000.00	\$0.00	\$5,561,000.00	\$5,561,000.
			B95MC350001	\$5,714,000.00	\$0.00	\$5,714,000.00	\$5,714,000.
			B96MC350001	\$5,565,000.00	\$0.00	\$5,565,000.00	\$5,565,000.
			B97MC350001	\$5,481,000.00	\$0.00	\$5,481,000.00	\$5,481,000.
			B98MC350001	\$5,311,000.00	\$0.00	\$5,311,000.00	\$5,311,000.
			B99MC350001	\$5,343,000.00	\$0.00	\$5,343,000.00	\$5,343,000.
			B00MC350001	\$5,308,000.00	\$0.00	\$5,308,000.00	\$5,308,000.
			B01MC350001	\$5,486,000.00	\$0.00	\$5,486,000.00	\$5,486,000.
			B02MC350001	\$5,428,000.00	\$0.00	\$5,428,000.00	\$5,428,000.
			B03MC350001	\$5,366,000.00	\$0.00	\$5,366,000.00	\$5,366,000.
			B04MC350001	\$5,249,000.00	\$0.00	\$5,249,000.00	\$5,249,000.
			B05MC350001	\$4,981,454.00	\$0.00	\$4,981,454.00	\$4,981,454.
			B06MC350001	\$4,497,495.00	\$0.00	\$4,497,495.00	\$4,497,495.

Step 2: Apply customization to the report result

- Change the grid style to 'Corporate'
- Move metric '*Amount committed to the activities*' to the left
- Merge row headers



Creating Personal View - Example

Program	Fund Type	Grantee Name	Grant Number	Metrics	Authorized Amount	Amount Committed to Activities	Suballocated Amount	Net Drawn Amount
CDBG	EN	ALBUQUERQUE	B88MC350001		\$3,578,000.00	\$3,578,000.00	\$0.00	\$3,578,000.00
CDBG	EN	ALBUQUERQUE	B89MC350001		\$3,725,000.00	\$3,725,000.00	\$0.00	\$3,725,000.00
CDBG	EN	ALBUQUERQUE	B90MC350001		\$3,565,000.00	\$3,565,000.00	\$0.00	\$3,565,000.00
CDBG	EN	ALBUQUERQUE	B91MC350001		\$3,984,000.00	\$3,984,000.00	\$0.00	\$3,984,000.00
CDBG	EN	ALBUQUERQUE	B92MC350001		\$4,206,000.00	\$4,206,000.00	\$0.00	\$4,206,000.00
CDBG	EN	ALBUQUERQUE	B93MC350001		\$5,112,000.00	\$5,112,000.00	\$0.00	\$5,112,000.00
CDBG	EN	ALBUQUERQUE	B94MC350001		\$5,561,000.00	\$5,561,000.00	\$0.00	\$5,561,000.00
CDBG	EN	ALBUQUERQUE	B95MC350001		\$5,714,000.00	\$5,714,000.00	\$0.00	\$5,714,000.00
CDBG	EN	ALBUQUERQUE	B96MC350001		\$5,565,000.00	\$5,565,000.00	\$0.00	\$5,565,000.00
CDBG	EN	ALBUQUERQUE	B97MC350001		\$5,481,000.00	\$5,481,000.00	\$0.00	\$5,481,000.00
CDBG	EN	ALBUQUERQUE	B98MC350001		\$5,311,000.00	\$5,311,000.00	\$0.00	\$5,311,000.00
CDBG	EN	ALBUQUERQUE	B99MC350001		\$5,343,000.00	\$5,343,000.00	\$0.00	\$5,343,000.00
CDBG	EN	ALBUQUERQUE	B00MC350001		\$5,308,000.00	\$5,308,000.00	\$0.00	\$5,308,000.00
CDBG	EN	ALBUQUERQUE	B01MC350001		\$5,486,000.00	\$5,486,000.00	\$0.00	\$5,486,000.00

Step 3: Save the changes by going to Home> 'Create personal view' OR by clicking on 'Create personal view' button available on the Home breadcrumb.

Note: Personalized reports include prompt answers, filtering, sorting, pivoting, page by, and formatting.

It will **not** impact the original report.



Creating Personal View - Example

Step 4: Give a name to your personalized view

Create personal view ? X












You have 1 [subscription\(s\)](#) to this report.

Personal view

Name:

Report: PR01 - HUD Grants and Program Income


Step 5: Saved personalized views are accessible under My Subscription page under Personal View Subscriptions

    My Subscriptions <input type="text" value="Search: All folders"/>				
   Close				
Personal view subscriptions ?				
Subscription Name ▲	Report/Document ▲	Owner ▲	Address ▲	Personalized ▲ Action
 PR01 - HUD Grants and Program Income- Personalized	PR01 - HUD Grants and Program Income	C04004 Ivo - for Testing		 



Manage personal views

To run a personal view:

- From the upper left of any page, click the MicroStrategy icon  then select My Subscriptions. The My Subscriptions page opens and displays a list of your subscriptions and personal views.
- In the Personal View Subscriptions area, click the name of the personal view to run it.

To delete a personal view:


Select the check box in the Unsubscribe column and then click Unsubscribe.



Dynamic Visual Thresholds

Allows users to define visual thresholds:

- Set thresholds on values of metrics or relationship between metrics
- Use thresholds to highlight outliers to identify correlations



U.S. Department of Housing and Urban Development
Office of Community Planning and Development
Integrated Disbursement and Information System
PR49 - HOME Deadline Compliance Status Report
Requirement Years: 2011 Commitments, 2011 CHDO Reservations, and 2008 Disbursements

DATE: 08-13-13
TIME: 23:54
PAGE: 1

Grantee ▲	State ▲	Deadline Date ▲	Original Allocation ▼	Adjustments ▼	Requirement Amount ▼	Total C.R. or D. through Deadline ▼	% ▼	Shortfall ▼
LAREDO	TX	C 10/31/2013	\$26,207,519	\$0	\$26,207,519	\$25,918,771	98.90%	\$288,748
		R 10/31/2013	\$26,067,542	\$0	\$3,910,131	\$3,757,788	96.10%	\$152,344
		D 10/31/2013	\$22,217,187	\$0	\$22,217,187	\$25,126,074	100.00%	\$0

Visual Threshold Editor

☒ Auto-Apply changes

Thresholds for: Shortfall Properties Type: Value

-∞

+∞

131074

NOTE: Any ADDI allocations received through FY2007 are reflected in the Original Allocation and respective Requirements.
C-Commitments, R-CHDO Reservations, D-Disbursements
++ Adjustments could include grant reductions, deobligations, recapture of expired funds, or waivers of deadline requirements due to Presidentially-declared disasters.

Export individual grids/graph

- Users can export individual grids or graphs from within a dashboard

GROUPING: Grantee: **LAREDO** Grant Year: **2011**

Pop-up menu to export individual grid into Excel or PDF

DATE:
TIME:
PAGE:

Program Level Summary

Grant Number	Total Grant Amount	Total Funds Committed	Total Funds Available to Commit	% of Grant Funds Not Committed	Grant Funds Drawn	% of Grant Funds Drawn	Available to Draw	% Rem D
E11MC480505	\$249,191.00	\$249,191.00	\$0.00	0.00%	\$166,236.64	66.71%	\$82,954.36	

ESG Program Components

Activity Type	Total Committed to Activities	% of Grant Committed	Drawn Amount	% of Grant Drawn
Street Outreach	\$43,548.00	17.48%	\$38,173.79	15.32%
Shelter	\$87,634.00	35.17%	\$87,634.00	35.17%
Homeless Prevention	\$49,600.00	19.90%	\$29,939.98	12.01%
Rapid Re-Housing	\$55,300.00	22.19%	\$7,732.59	3.10%
Data Collection (HMIS)	\$4,666.00	1.87%	\$0.00	0.00%
Administration	\$8,443.00	3.39%	\$2,756.28	1.11%
Funds Not Committed	\$0.00	0.00%	\$0.00	0.00%
Funds Remaining to Draw	\$0.00	0.00%	\$82,954.36	33.29%
Total	\$249,191.00	100.00%	\$249,191.00	100.00%

Grant Number	Total Grant Amount	Total Funds Committed	Total Funds Available to Commit	% of Grant Funds Not Committed	Grant Funds Drawn	% of Grant Funds Drawn	Available to Draw	% F
E11MC480505	\$249,191.00	\$249,191.00	\$0.00	0.00%	\$166,236.64	66.71%	\$82,954.36	

Export individual grids/graph

- Ability to export individual graphs

