MicroStrategy v 9.3 upgrade for IDIS Reporting

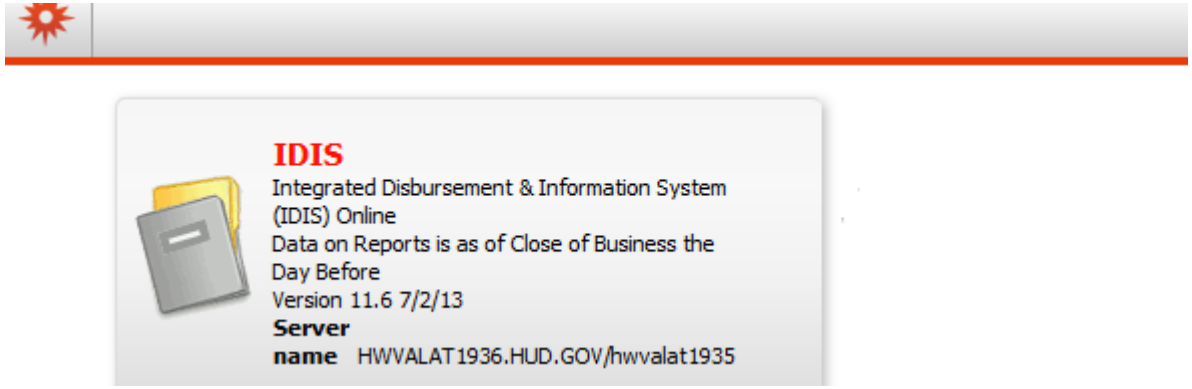
November 2013

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

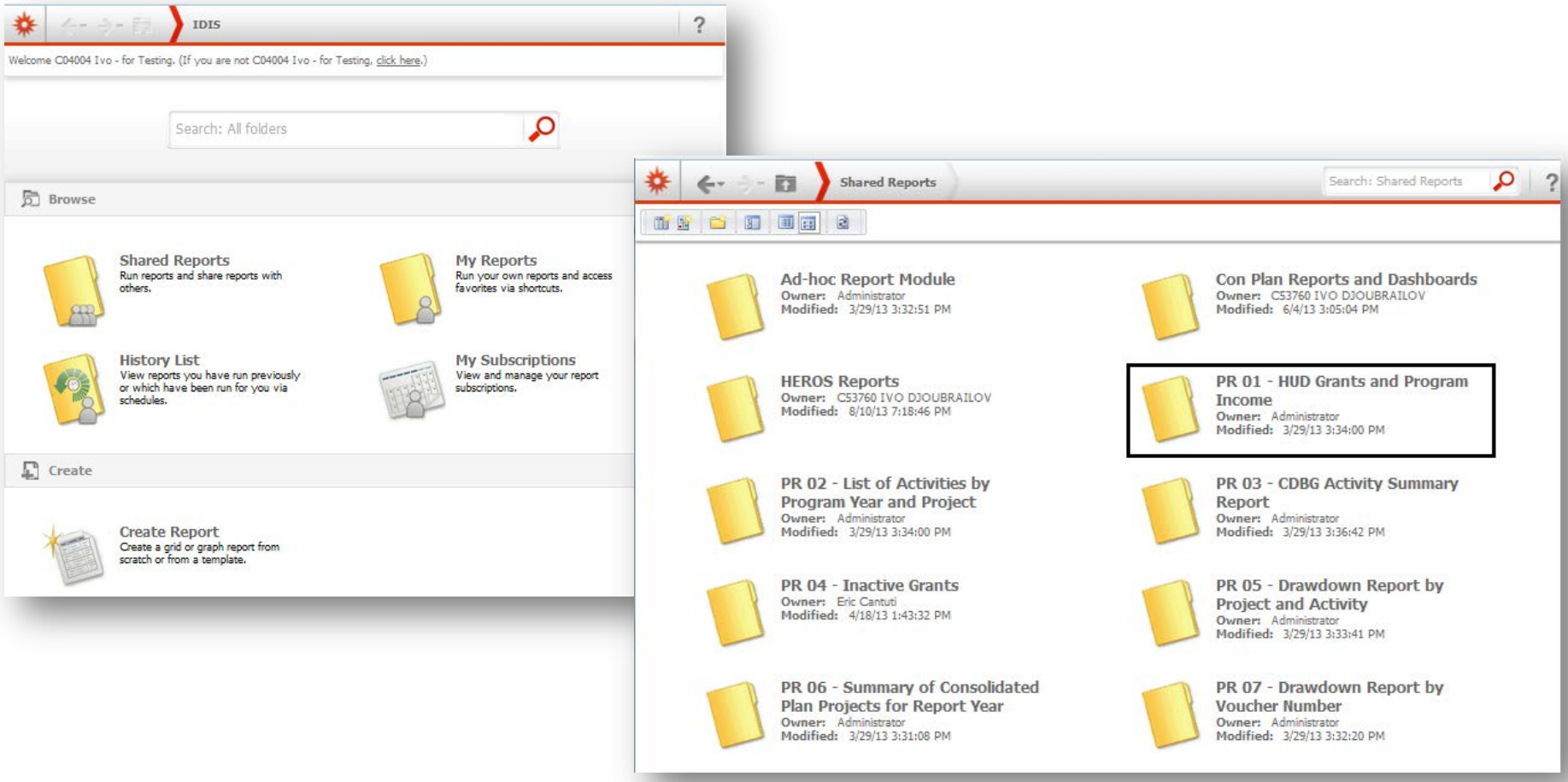
Overview of new interface

- Continue to access reports from within the IDIS Online application

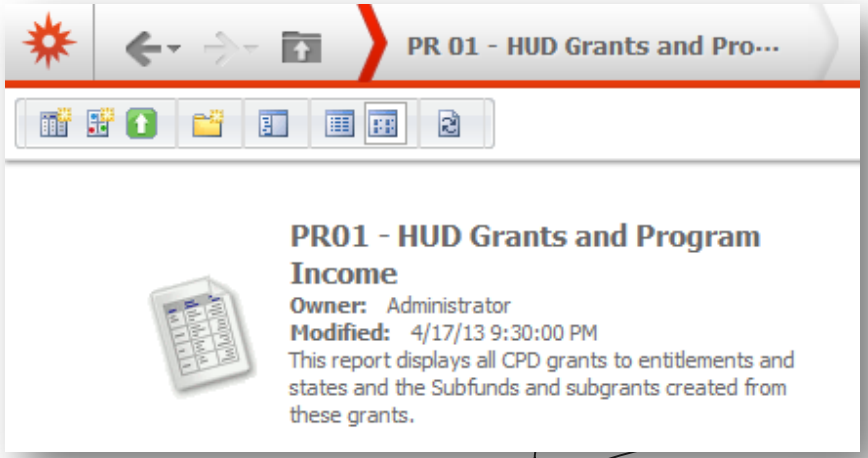


Overview of new interface

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



Overview of new interface

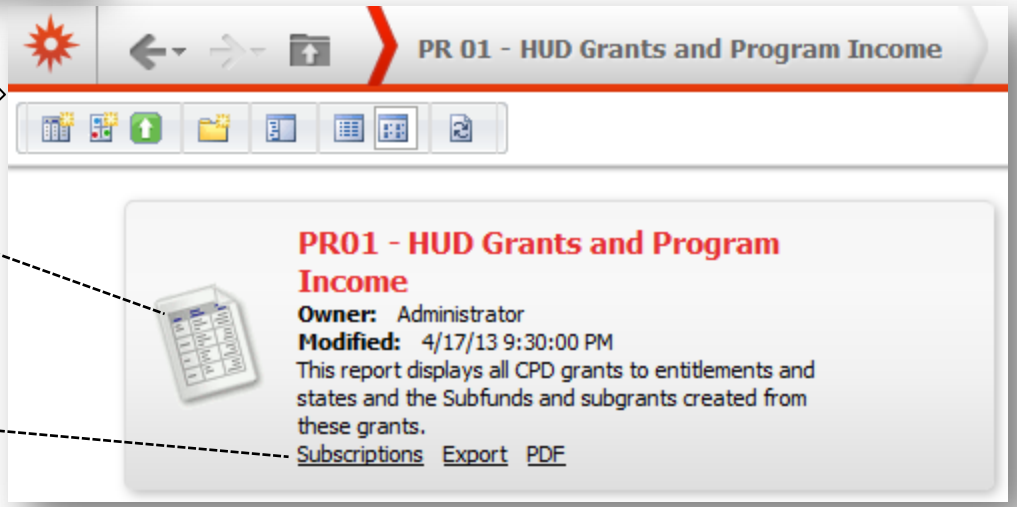


Streamlined 'Office-like' interface

requires hover over to reveal options

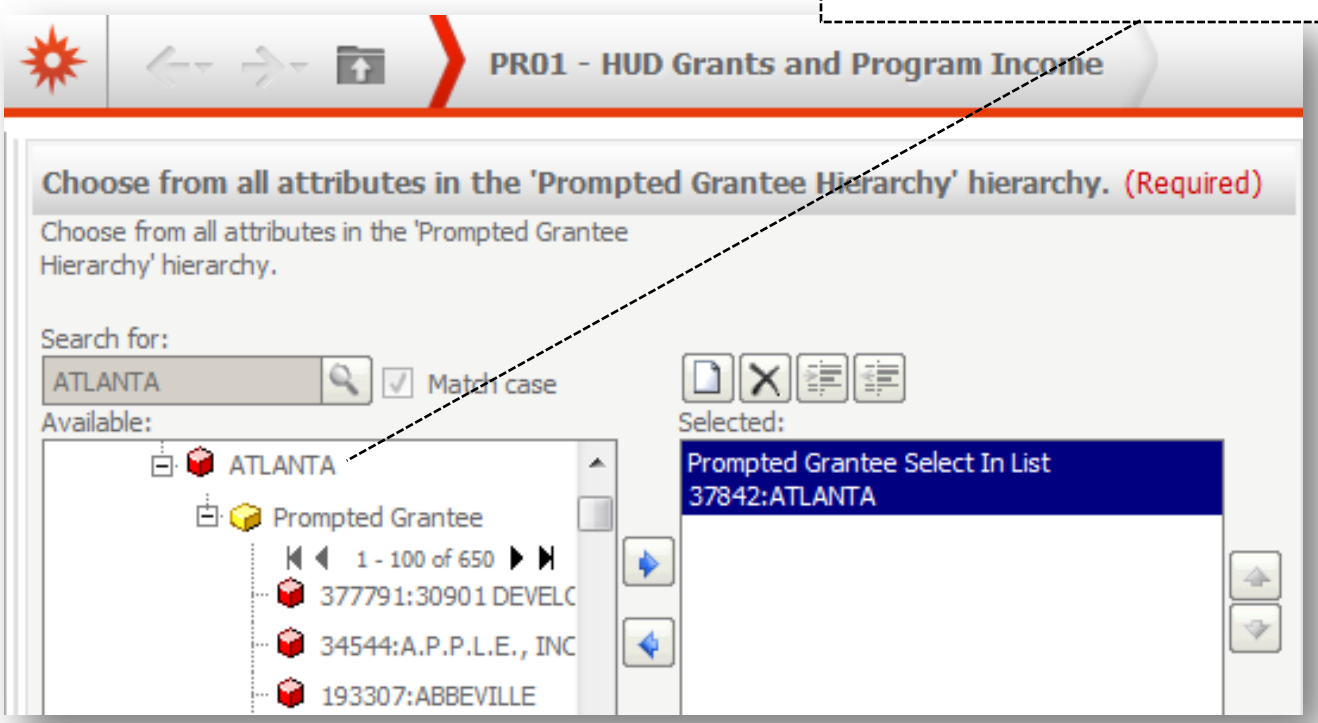
Click report icon to directly execute the report

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

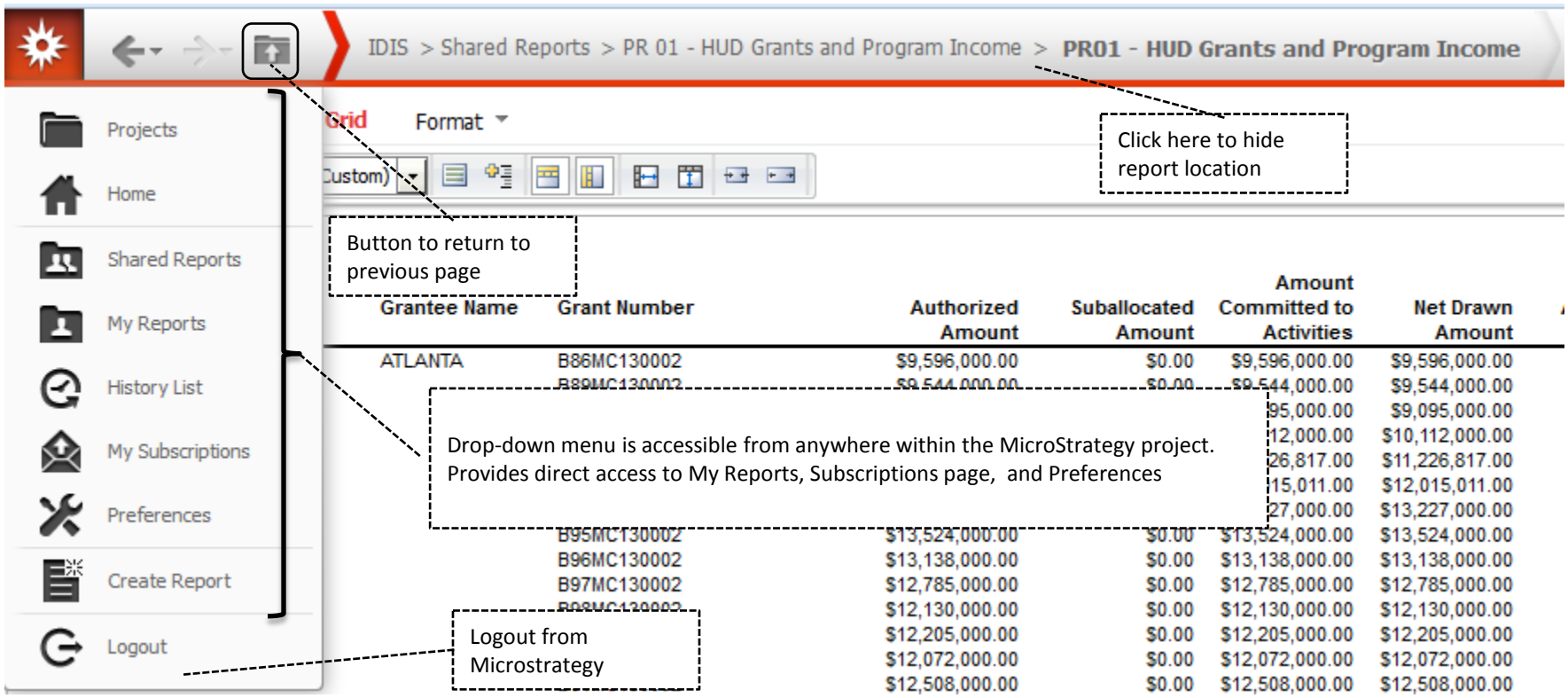


Execution of reports and common functionality

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

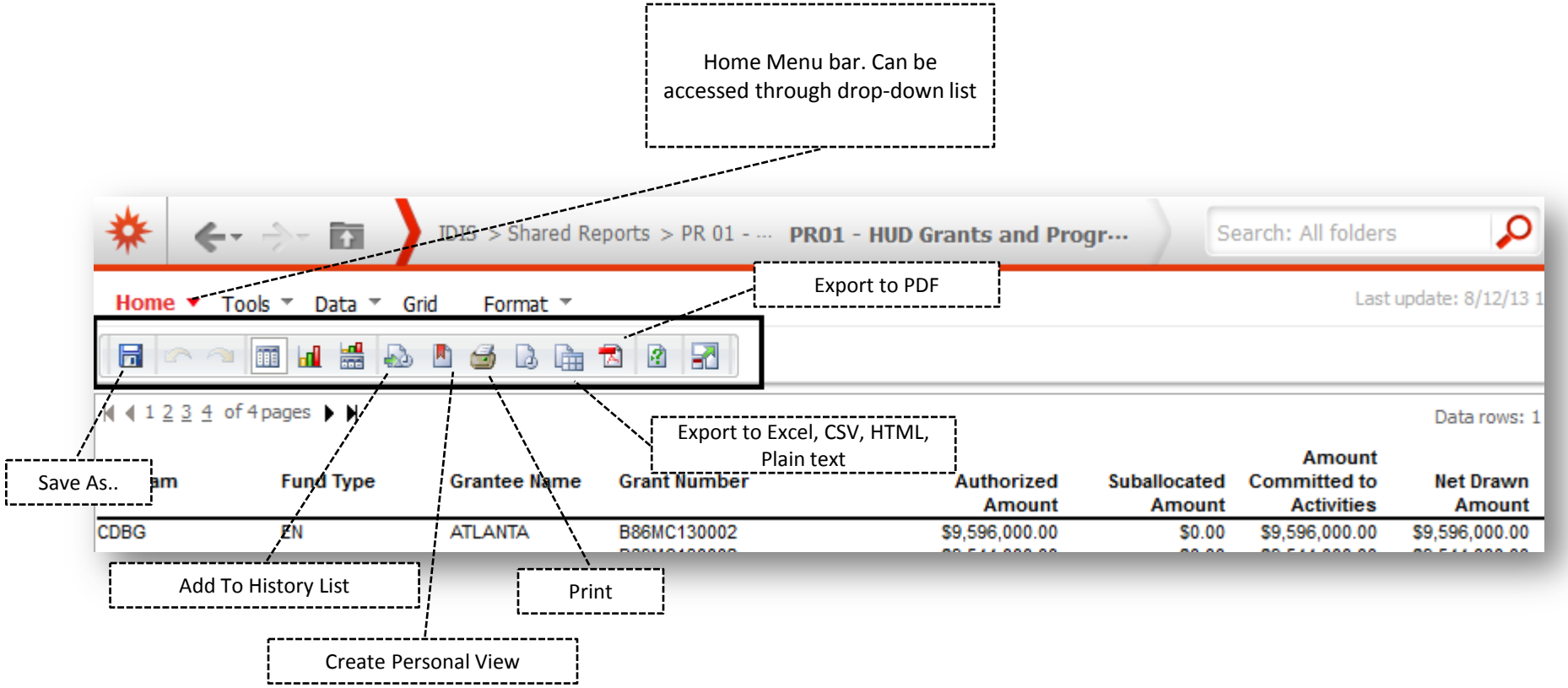


Execution of reports and common functionality



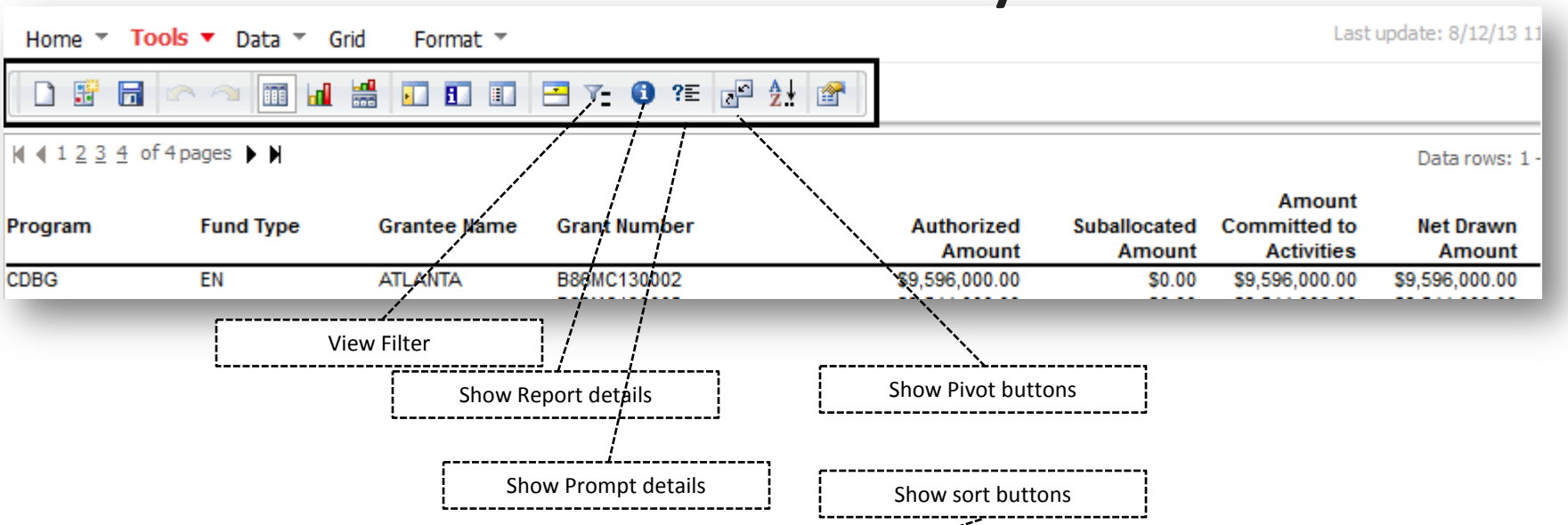
Execution of reports and common functionality

- **New toolbar with both a list menu and icons**

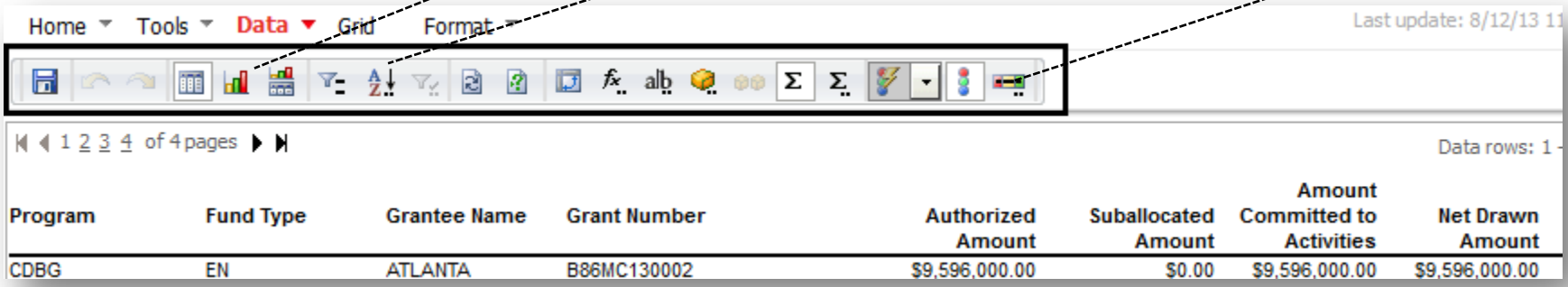


Execution of reports and common functionality

Tools Menu

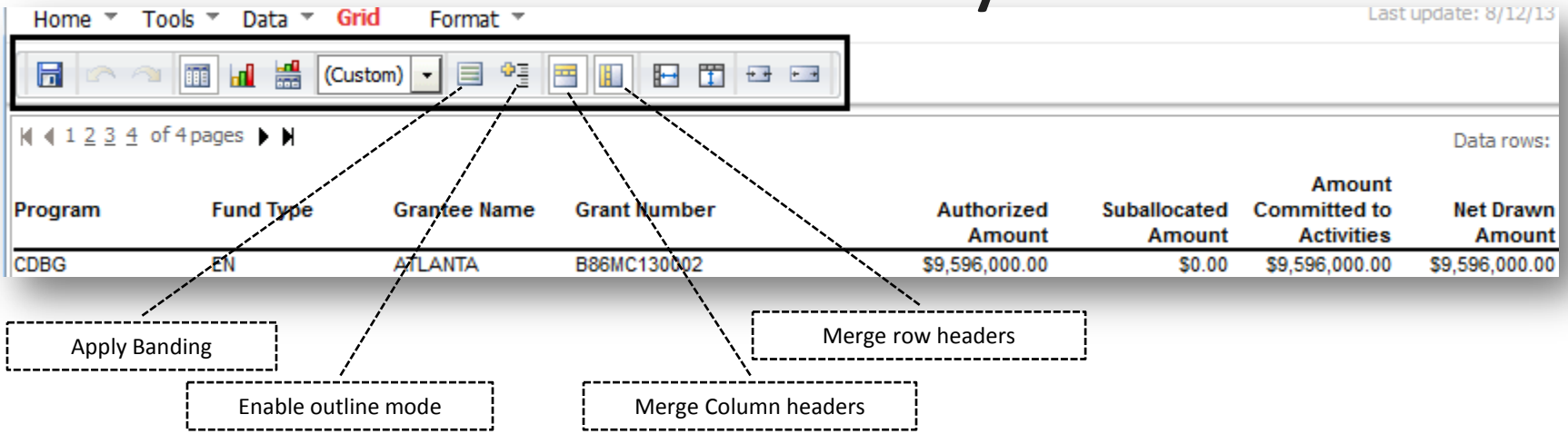


Data Menu

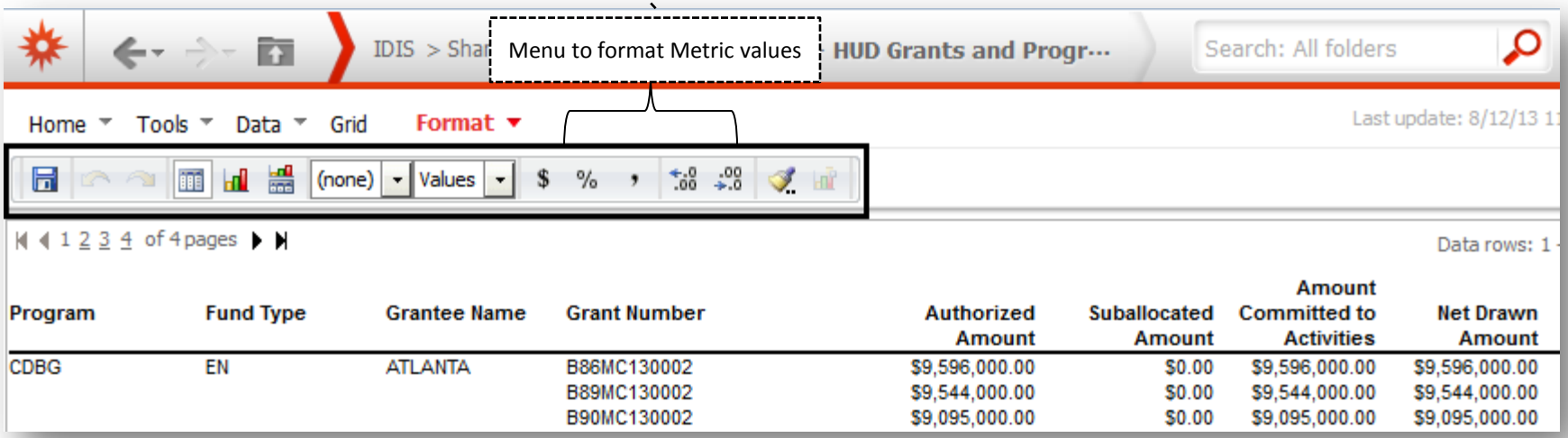


Execution of reports and common functionality

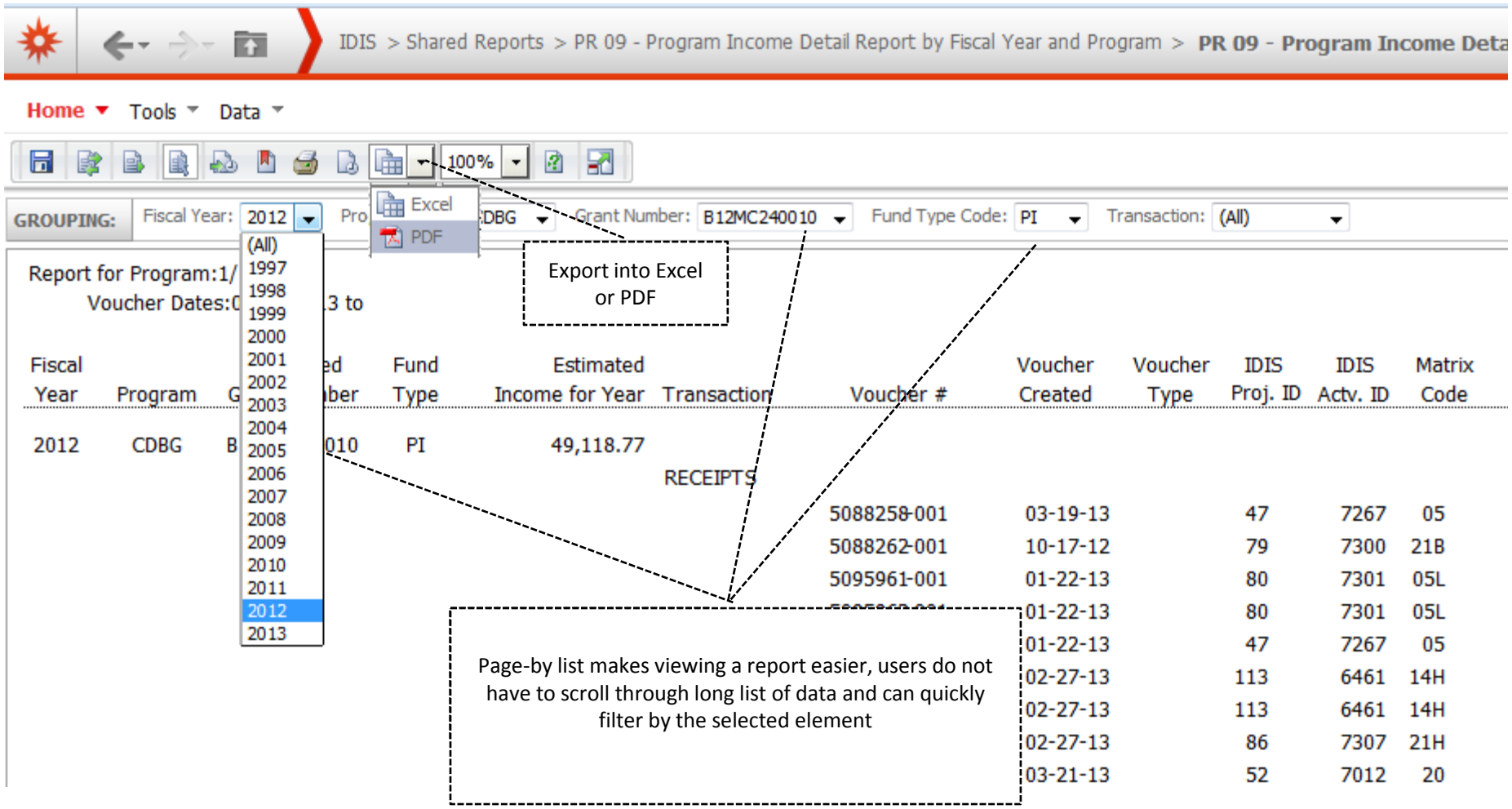
Grid Menu



Format Menu

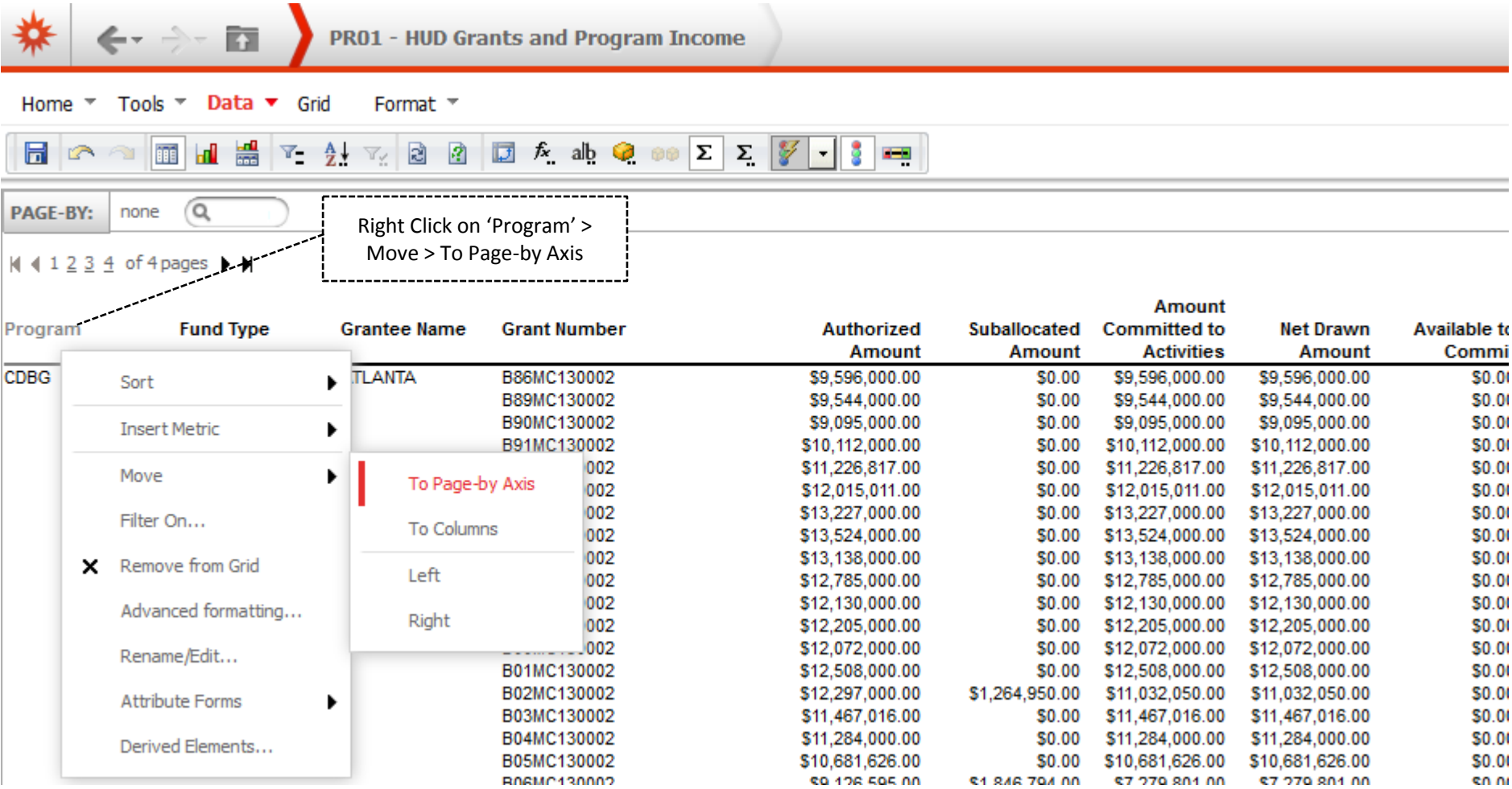


Page-by & Export

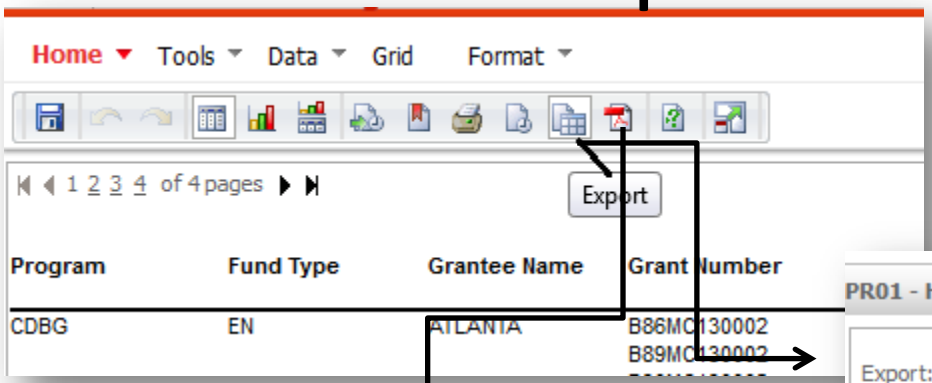


How to add to page-by

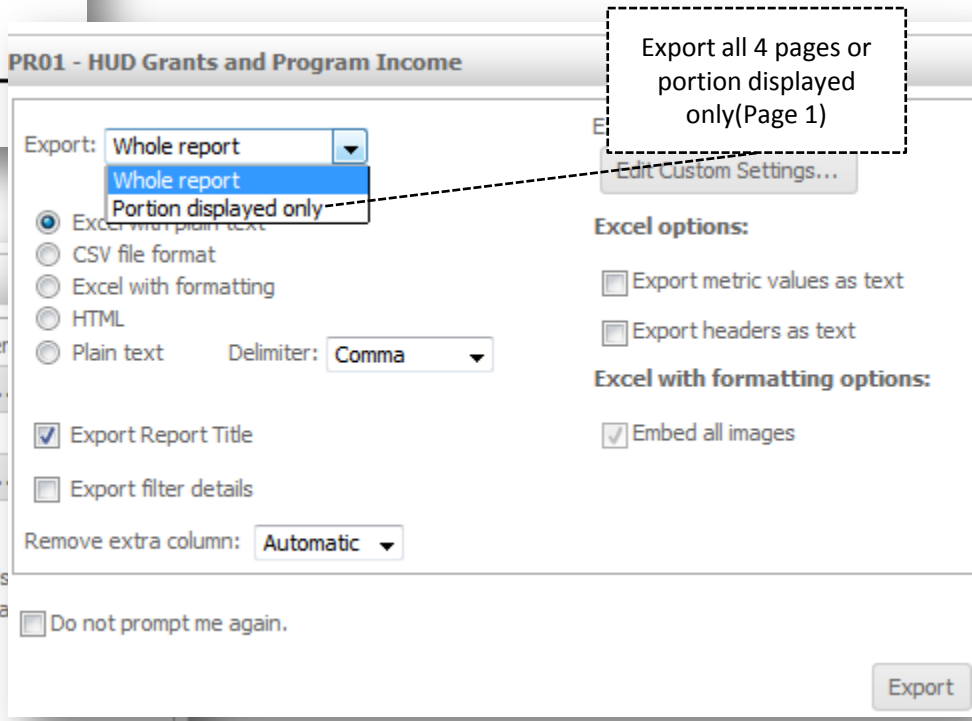
- Any attribute can be added to the page-by axis



Export

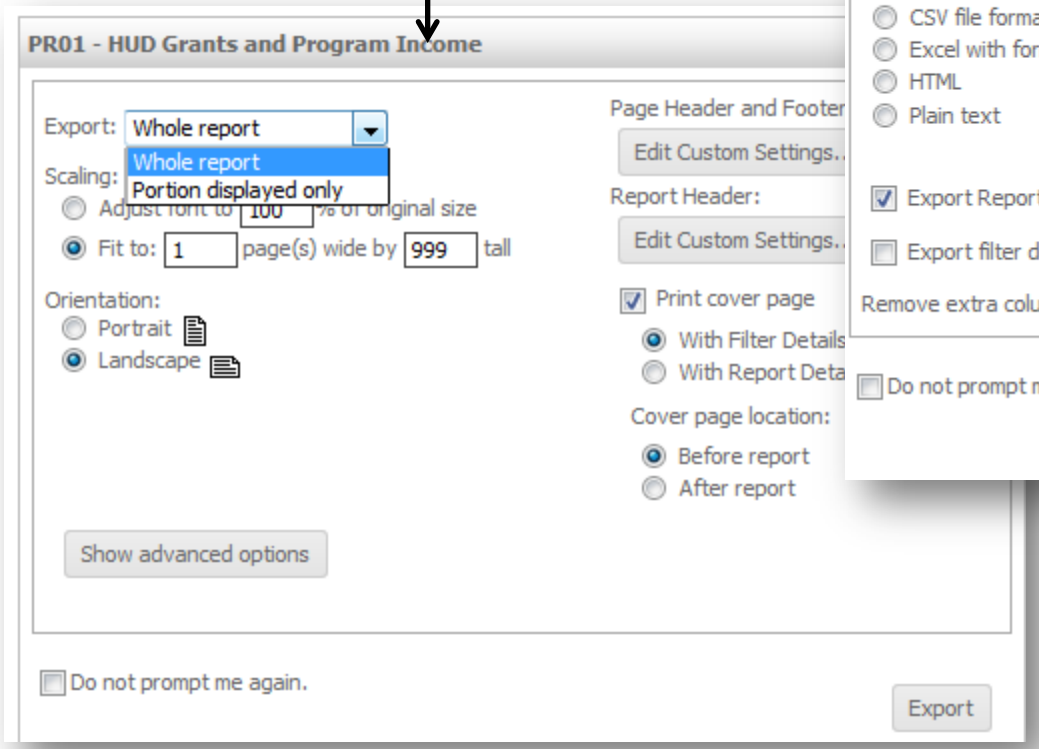


Excel & other options

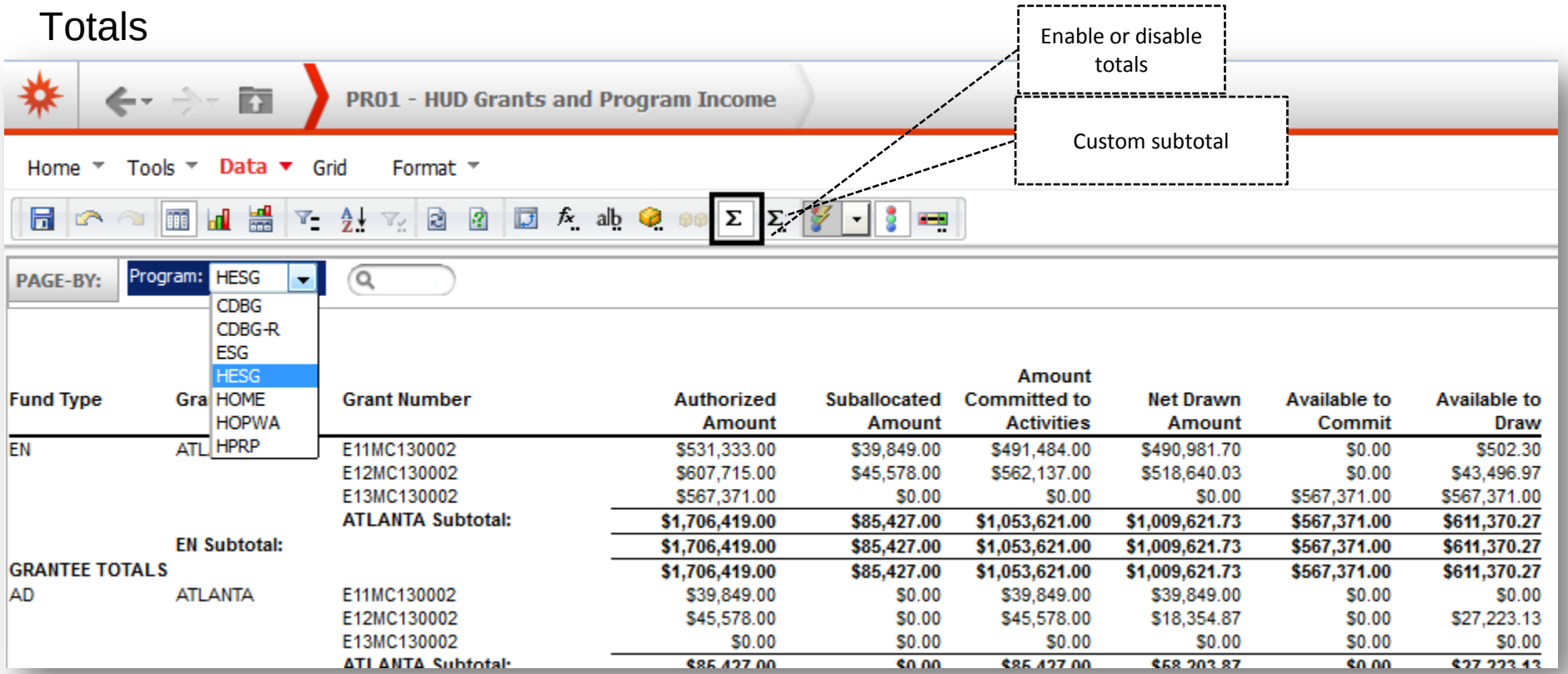


Export all 4 pages or portion displayed only(Page 1)

PDF Options

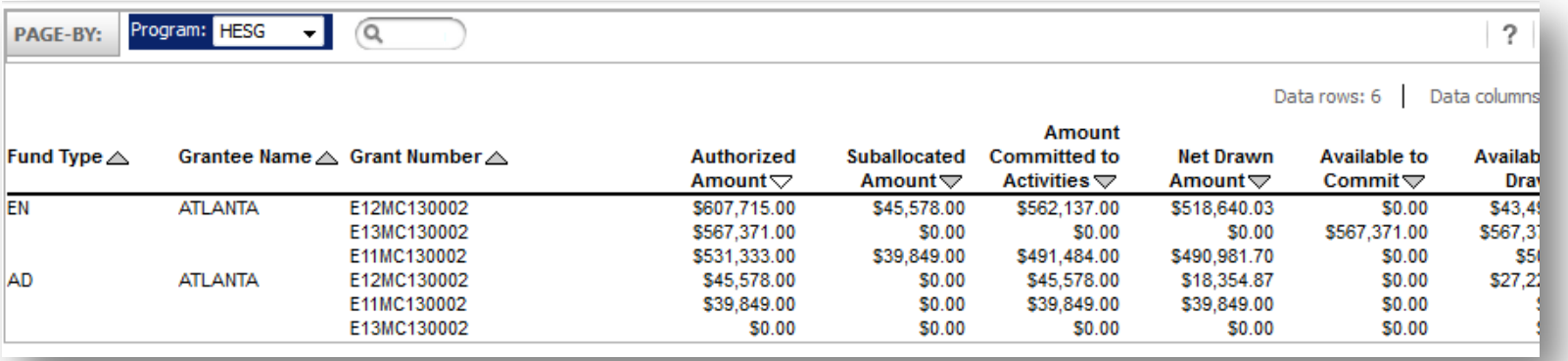


Totals



Fund Type	Gra	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**

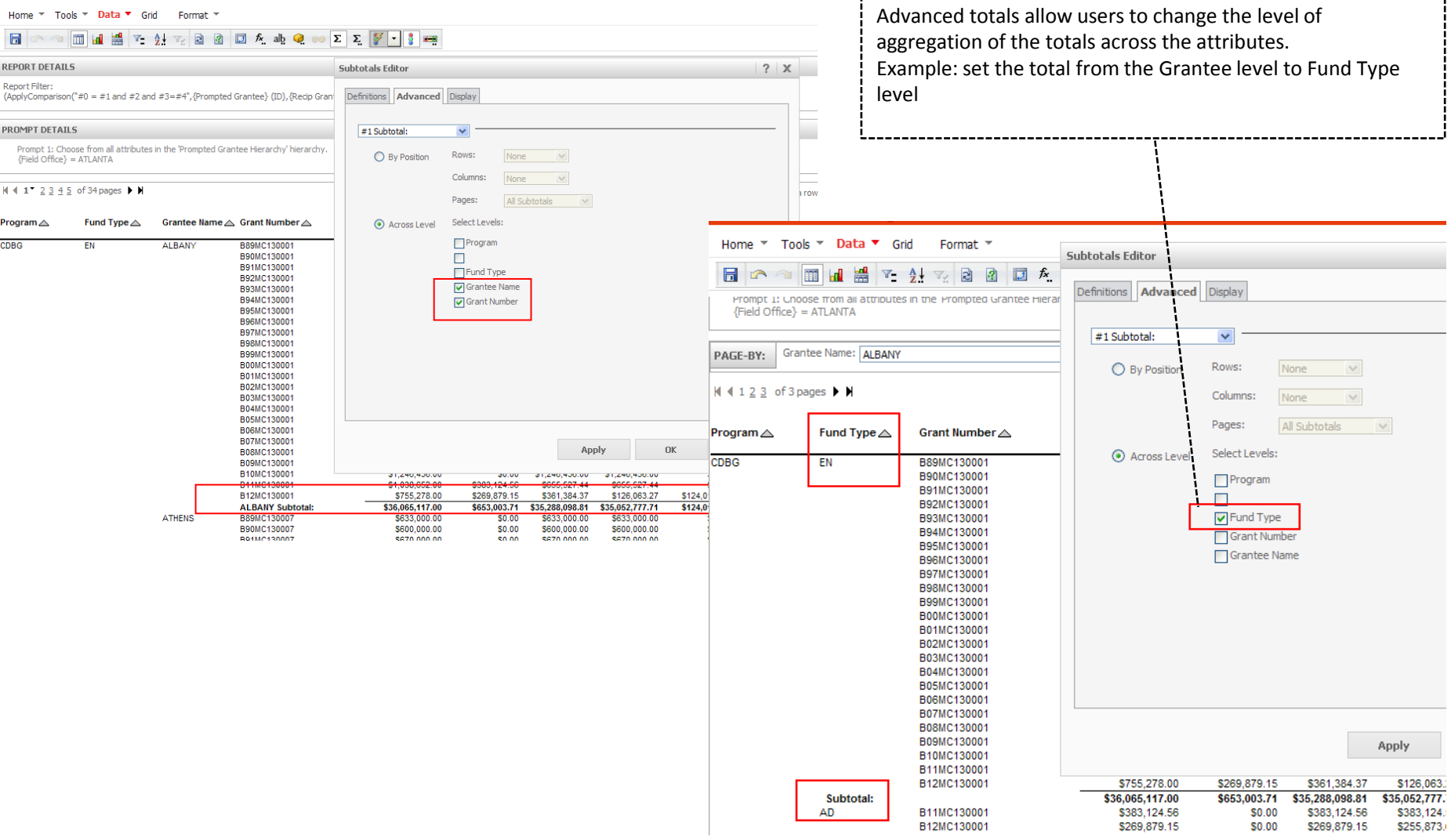
Disabled subtotal



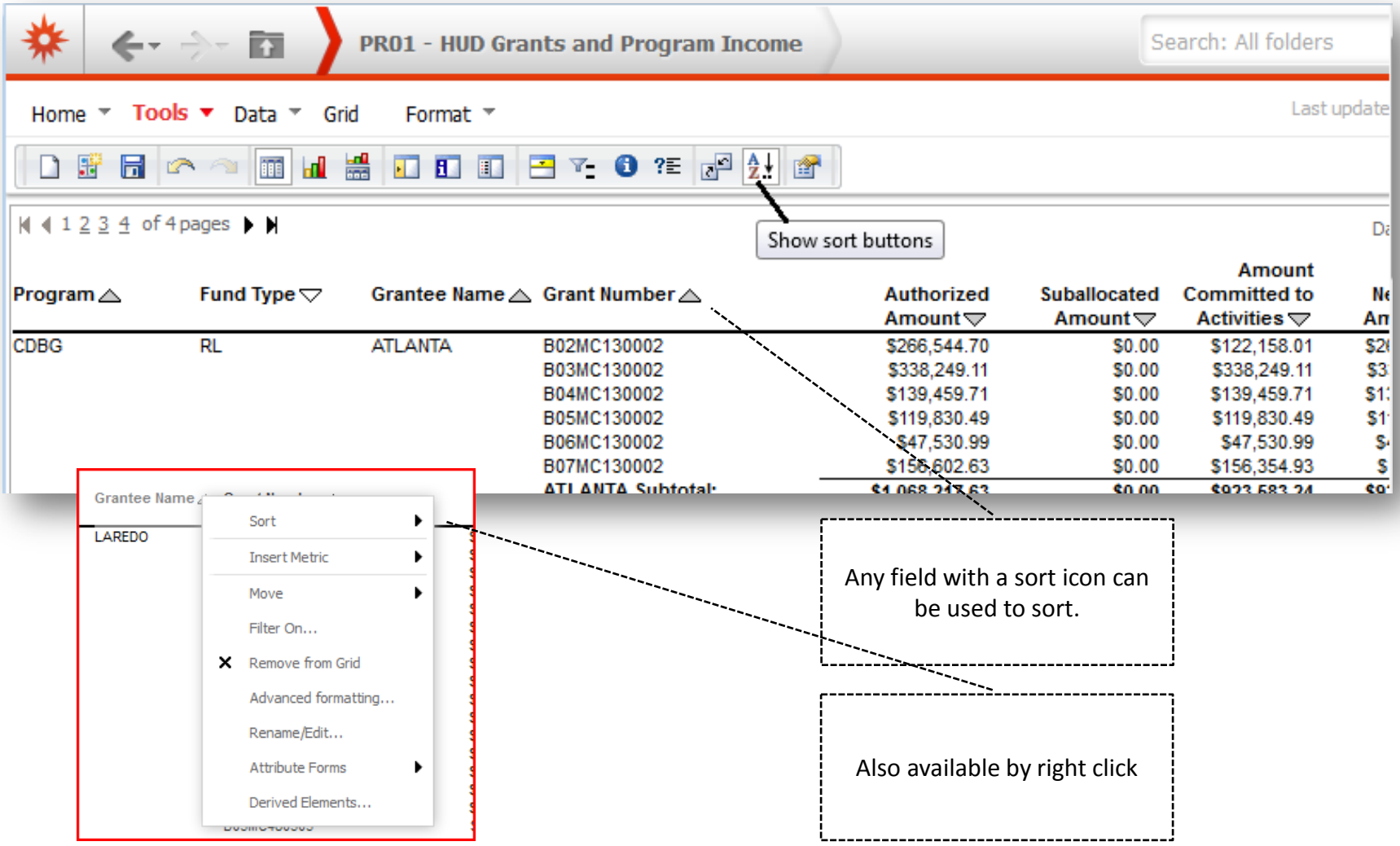
Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Availab Dra
EN	ATLANTA	E12MC130002	$607,715.00	$45,578.00	$562,137.00	$518,640.03	$0.00	$43,4
		E13MC130002	$567,371.00	$0.00	$0.00	$0.00	$567,371.00	$567,3
		E11MC130002	$531,333.00	$39,849.00	$491,484.00	$490,981.70	$0.00	$5
AD	ATLANTA	E12MC130002	$45,578.00	$0.00	$45,578.00	$18,354.87	$0.00	$27,2
		E11MC130002	$39,849.00	$0.00	$39,849.00	$39,849.00	$0.00	
		E13MC130002	$0.00	$0.00	$0.00	$0.00	$0.00	

Totals – Advanced Totals

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

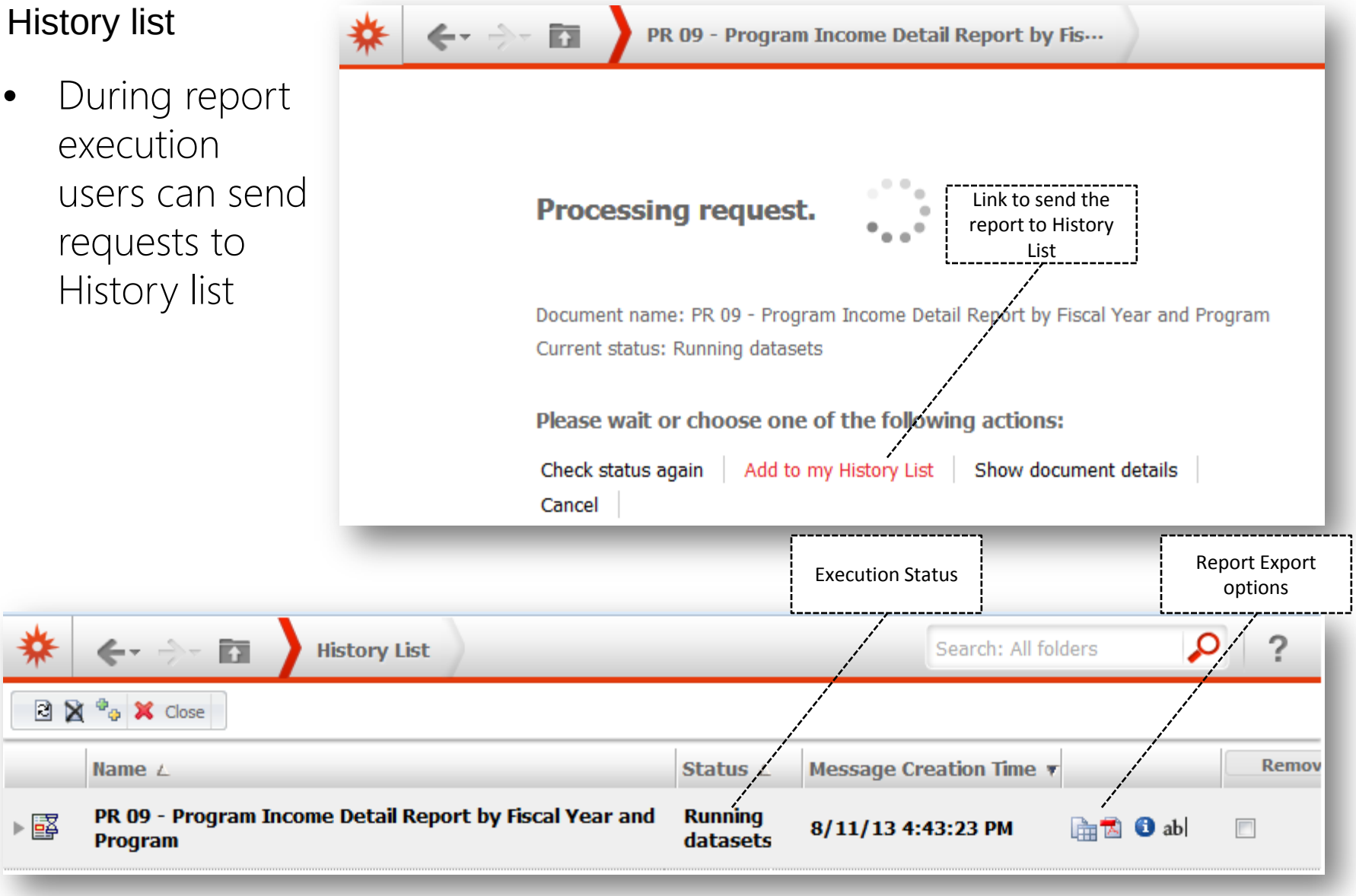


Sorting


PR01 - HUD Grants and Program Income
Search: All folders
Home
Tools
Data
Grid
Format
Last update
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
CDBG
RL
ATLANTA
B02MC130002
$266,544.70
$0.00
$122,158.01
B03MC130002
$338,249.11
$0.00
$338,249.11
B04MC130002
$139,459.71
$0.00
$139,459.71
B05MC130002
$119,830.49
$0.00
$119,830.49
B06MC130002
$47,530.99
$0.00
$47,530.99
B07MC130002
$156,602.63
$0.00
$156,354.93
Grantee Name
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

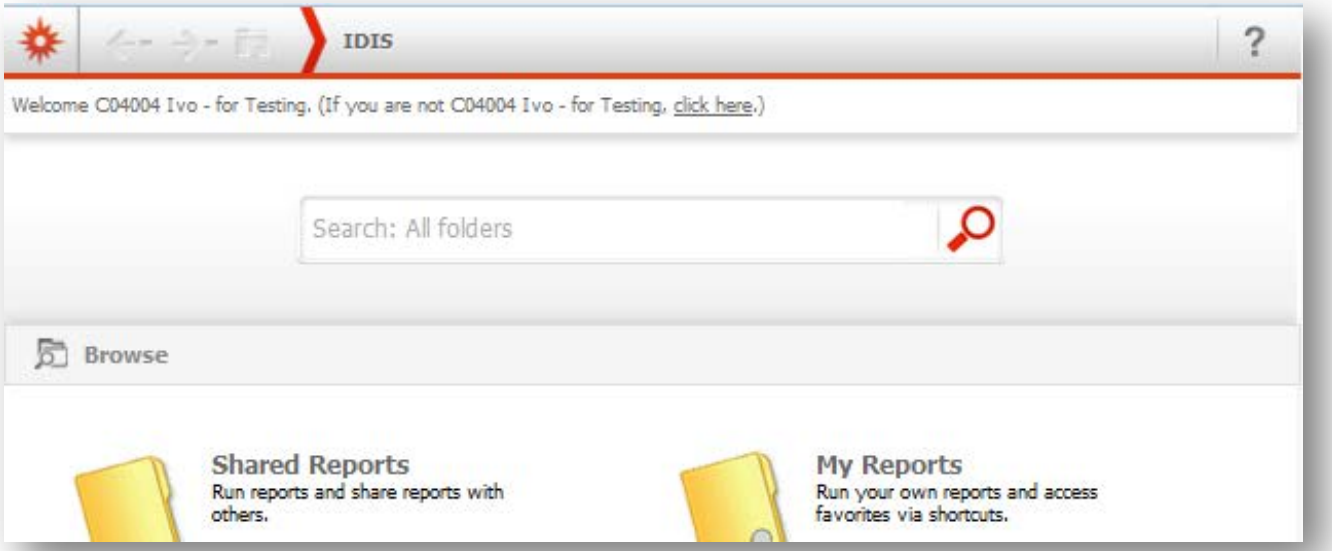
History list

- During report execution users can send requests to History list

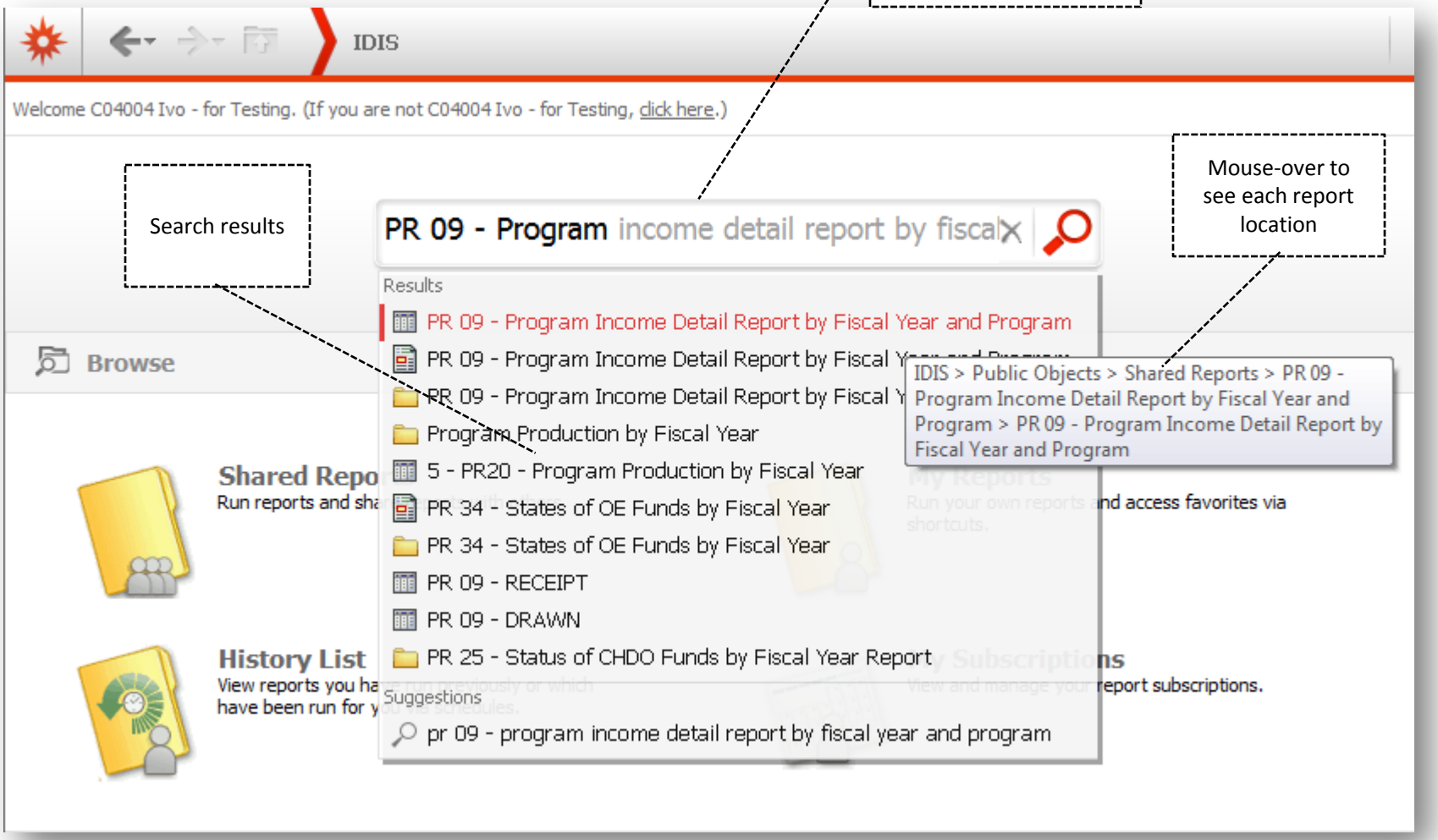


New features: Live Search / Quick search

- 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



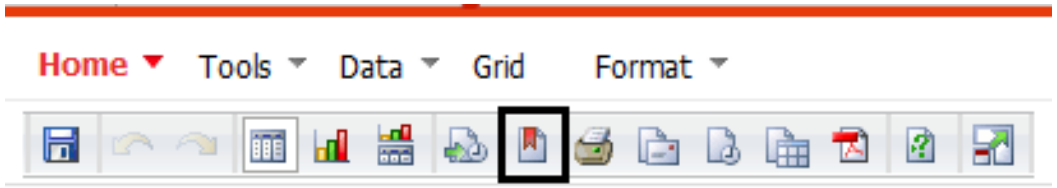
Quick sea


Provides search results with suggestions as user types
IDIS
Welcome C04004 Ivo - for Testing. (If you are not C04004 Ivo - for Testing, click here.)
Search results
PR 09 - Program income detail report by fiscal
Mouse-over to see each report location
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
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
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 Repo
Run reports and sha
History List
View reports you ha
have been run for y
My Reports
Run your own reports
shortcuts.
nd access favorites via
ns
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 Drav 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	$3,578,000.0
CDBG	EN	ALBUQUERQUE	B89MC350001		$3,725,000.00	$3,725,000.00	$0.00	$3,725,000.0
CDBG	EN	ALBUQUERQUE	B90MC350001		$3,565,000.00	$3,565,000.00	$0.00	$3,565,000.0
CDBG	EN	ALBUQUERQUE	B91MC350001		$3,984,000.00	$3,984,000.00	$0.00	$3,984,000.0
CDBG	EN	ALBUQUERQUE	B92MC350001		$4,206,000.00	$4,206,000.00	$0.00	$4,206,000.0
CDBG	EN	ALBUQUERQUE	B93MC350001		$5,112,000.00	$5,112,000.00	$0.00	$5,112,000.0
CDBG	EN	ALBUQUERQUE	B94MC350001		$5,561,000.00	$5,561,000.00	$0.00	$5,561,000.0
CDBG	EN	ALBUQUERQUE	B95MC350001		$5,714,000.00	$5,714,000.00	$0.00	$5,714,000.0
CDBG	EN	ALBUQUERQUE	B96MC350001		$5,565,000.00	$5,565,000.00	$0.00	$5,565,000.0
CDBG	EN	ALBUQUERQUE	B97MC350001		$5,481,000.00	$5,481,000.00	$0.00	$5,481,000.0
CDBG	EN	ALBUQUERQUE	B98MC350001		$5,311,000.00	$5,311,000.00	$0.00	$5,311,000.0
CDBG	EN	ALBUQUERQUE	B99MC350001		$5,343,000.00	$5,343,000.00	$0.00	$5,343,000.0
CDBG	EN	ALBUQUERQUE	B00MC350001		$5,308,000.00	$5,308,000.00	$0.00	$5,308,000.0
CDBG	EN	ALBUQUERQUE	B01MC350001		$5,486,000.00	$5,486,000.00	$0.00	$5,486,000.0

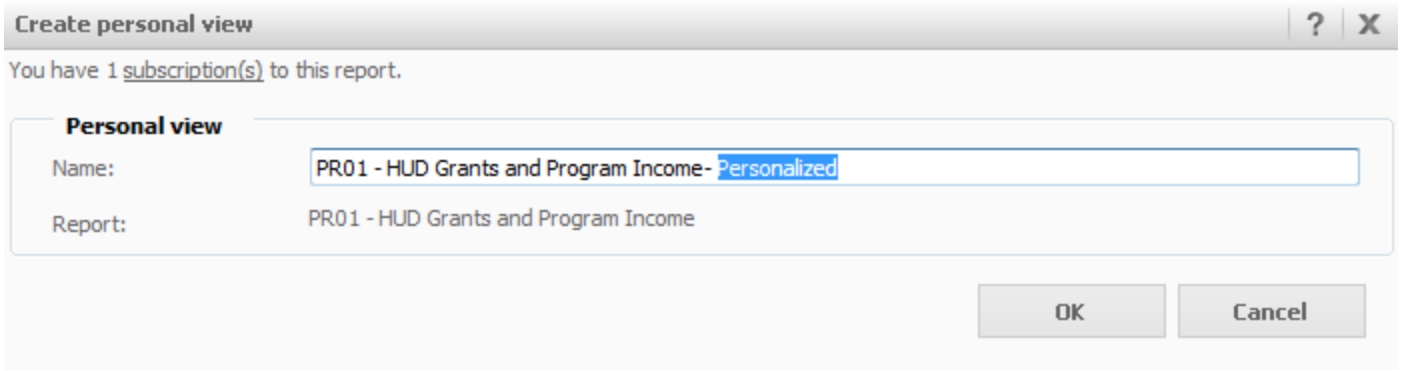
Step 3: Save the changes by going to Home> 'Create personal view' OR by clicking on 'Create personal view' button available on the Home breadcrumb.

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

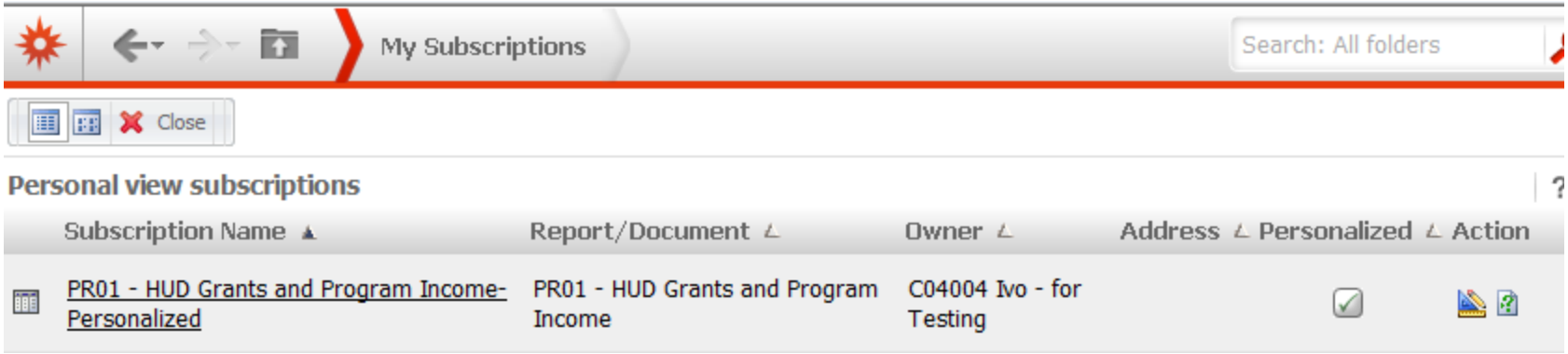
It will **not** impact the original report.

Creating Personal View - Example

Step 4: Give a name to your personalized view



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



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.

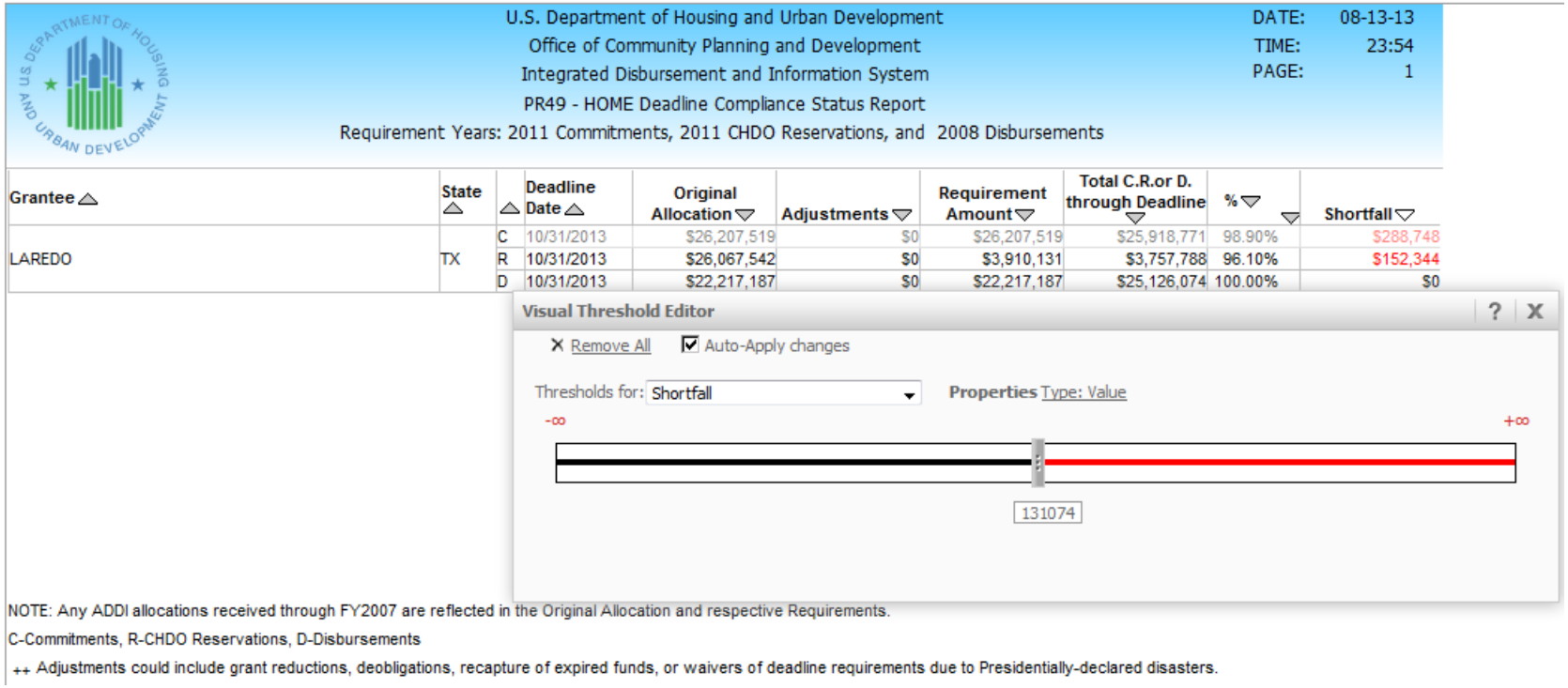
To delete a personal view:

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

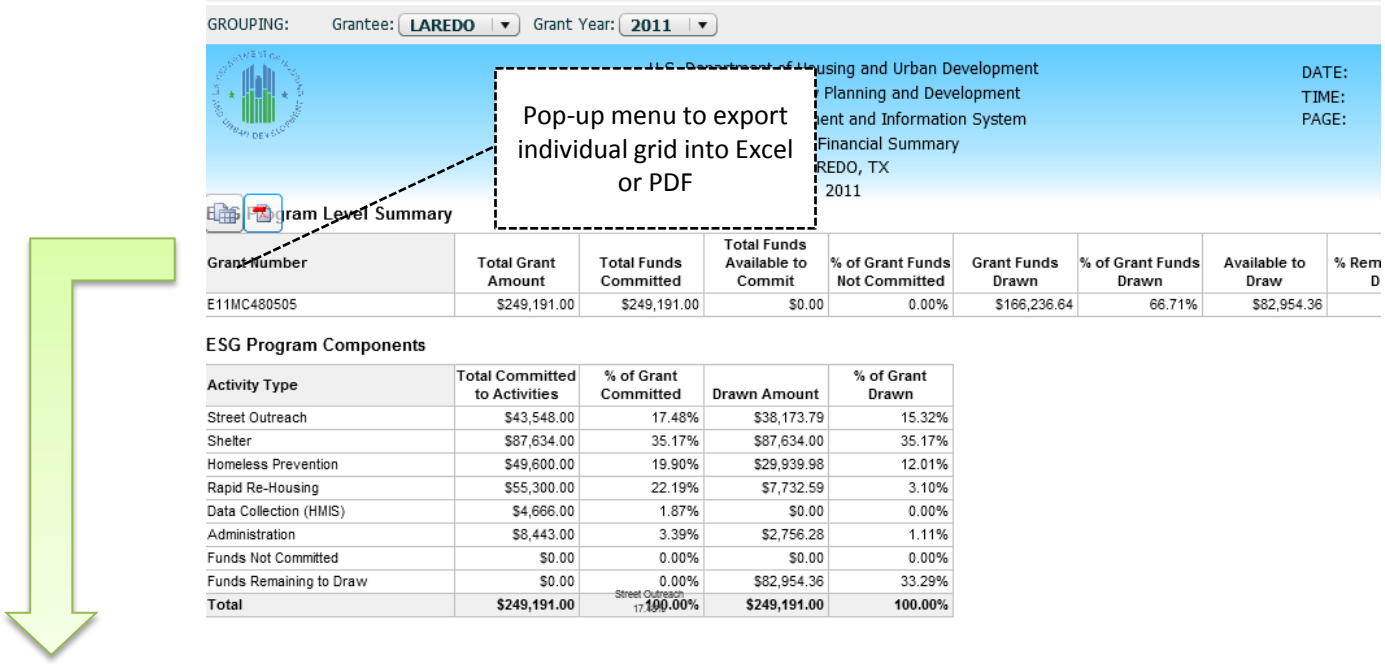
DATE: 08-13-13
TIME: 23:54
PAGE: 1

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

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

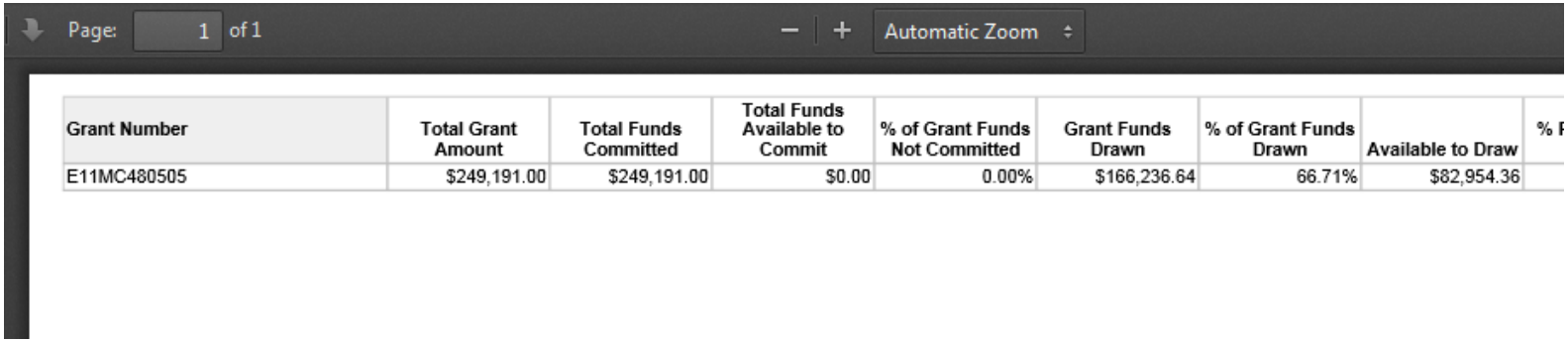
- Users can export individual grids or graphs from within a dashboard



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%**



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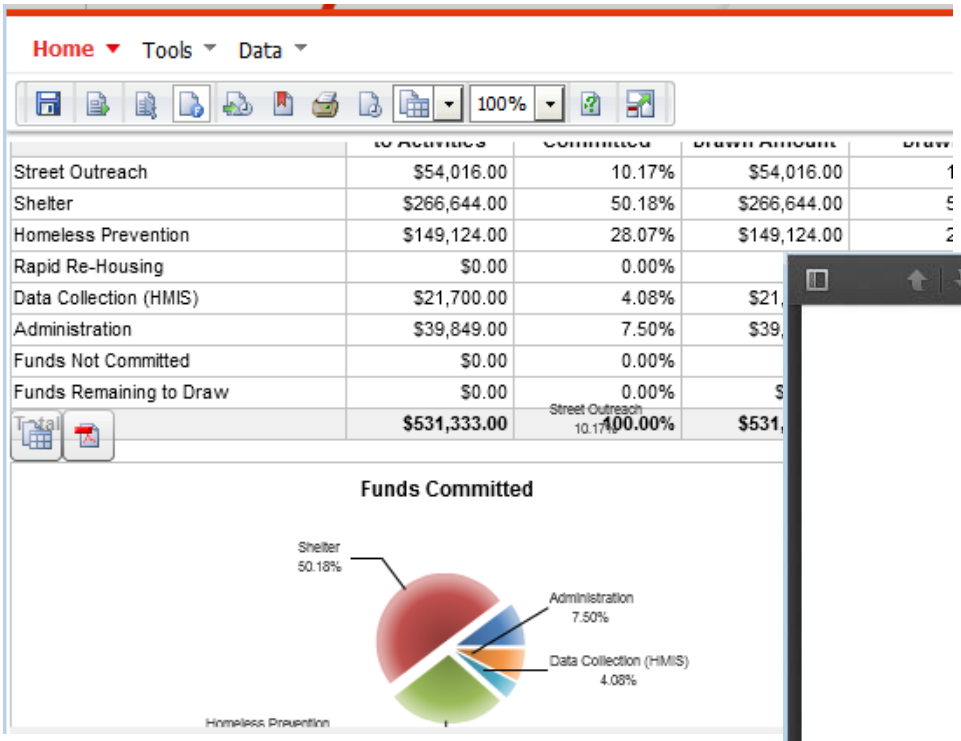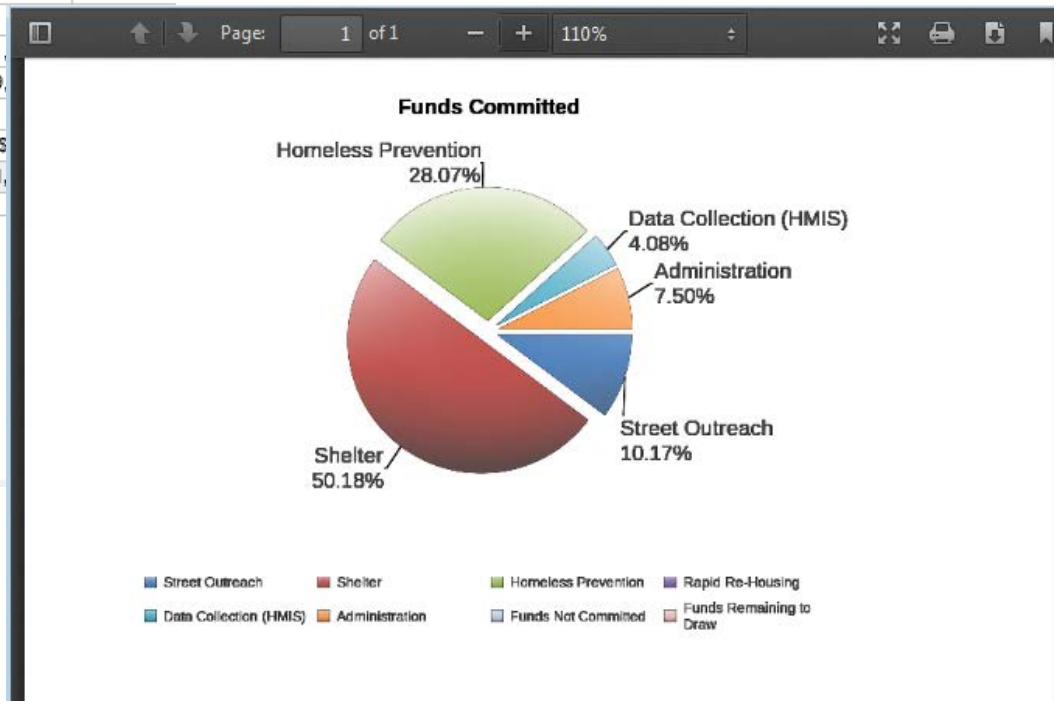
- Ability to export individual graphs