

## Quick Sheet: Upload Reports to OLDC in Excel or XML Format

**Audience:** HUD Grant Recipients

### INTRODUCTION

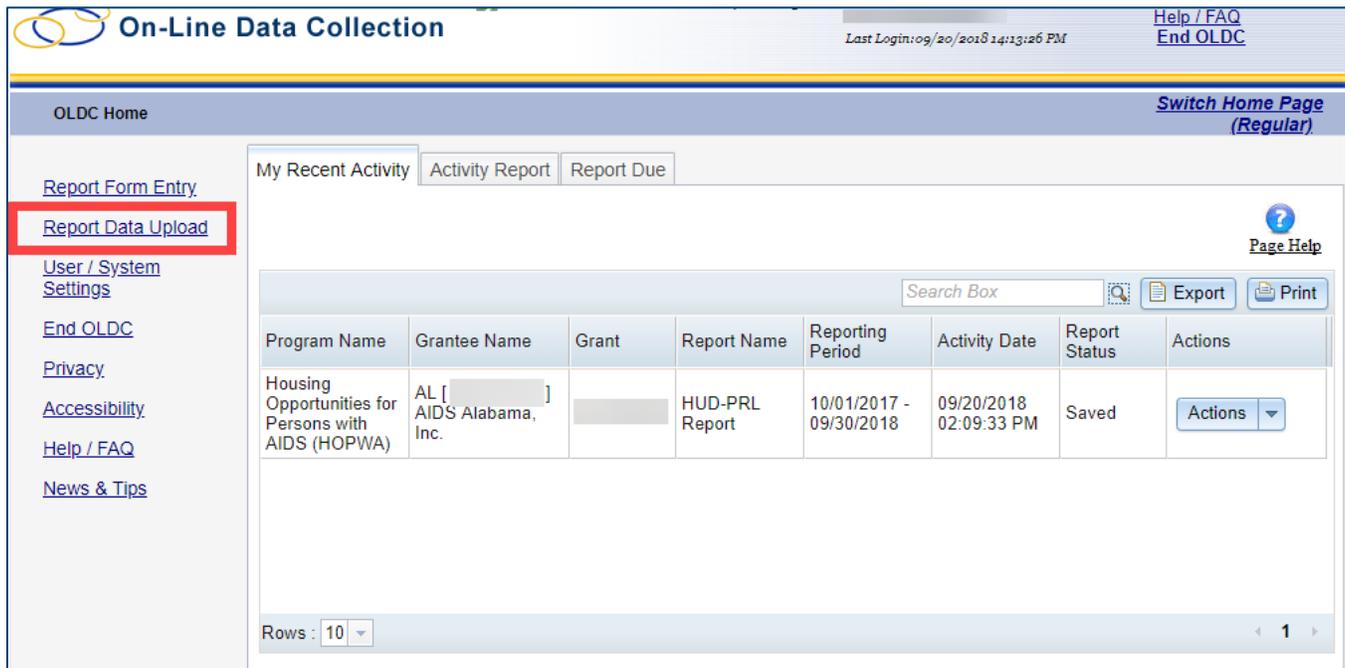
US Department of Housing and Urban Development (HUD) Grant Recipients now have the option to complete the Standards for Success Annual (PRL) Report in a Microsoft Excel or extensible Markup Language (XML) template and upload it to GrantSolutions inForm, also referred to as Online Data Collection (OLDC). If you decide to submit your Standards for Success Annual (PRL) Report using either of these options, you must first notify HUD of your intention at AskGMO@hud.gov in order to acquire this functionality in GrantSolutions. You may find the templates at [www.hudexchange.info/programs/standards-for-success/](http://www.hudexchange.info/programs/standards-for-success/) under “Reporting Tools”, clicking on Other case management system, and clicking on the appropriate links.

**Important!** Once uploaded, reports must still be validated, certified, and submitted in OLDC.

### UPLOAD A REPORT

To upload a report that was completed in either the provided MS Excel or XML template, perform the following actions:

1. Log into GrantSolutions OLDC ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. From the OLDC Home screen, click the link **Report Data Upload** from the side navigation menu.



**On-Line Data Collection** Last Login: 09/20/2018 14:13:26 PM [Help / FAQ](#) [End OLDC](#)

OLDC Home [Switch Home Page \(Regular\)](#)

My Recent Activity Activity Report Report Due

[Report Form Entry](#)  
**[Report Data Upload](#)**  
[User / System Settings](#)  
[End OLDC](#)  
[Privacy](#)  
[Accessibility](#)  
[Help / FAQ](#)  
[News & Tips](#)

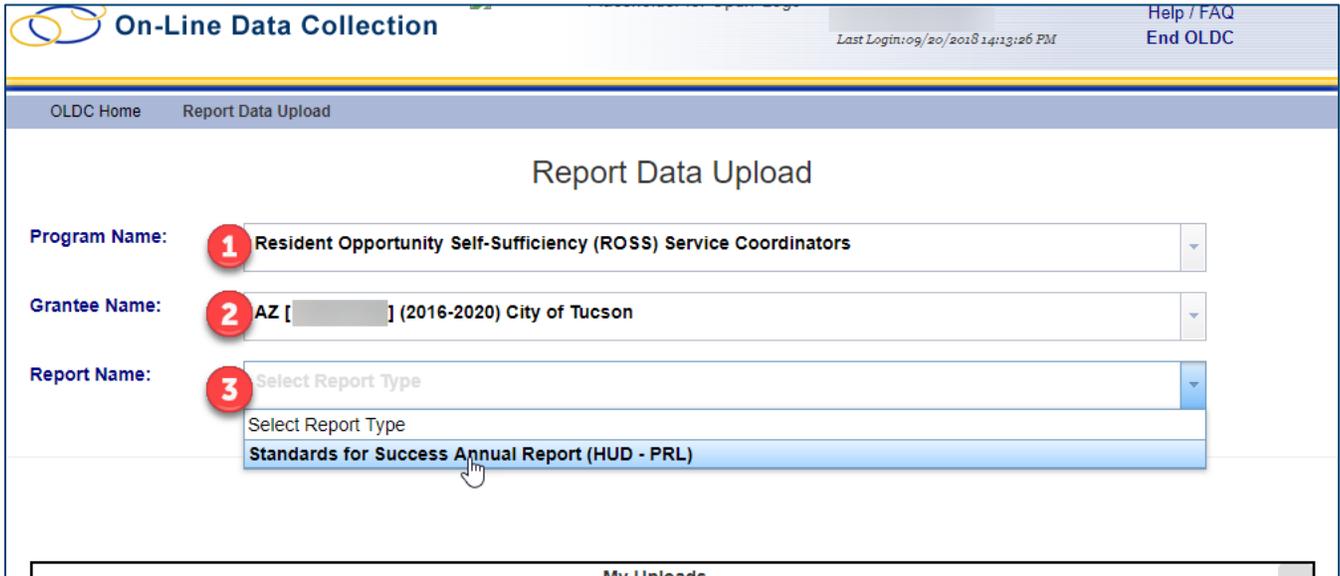
[Page Help](#)

Search Box  [Export](#) [Print](#)

Program Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
Housing Opportunities for Persons with AIDS (HOPWA)	AL [REDACTED] AIDS Alabama, Inc.	[REDACTED]	HUD-PRL Report	10/01/2017 - 09/30/2018	09/20/2018 02:09:33 PM	Saved	<a href="#">Actions</a> ▼

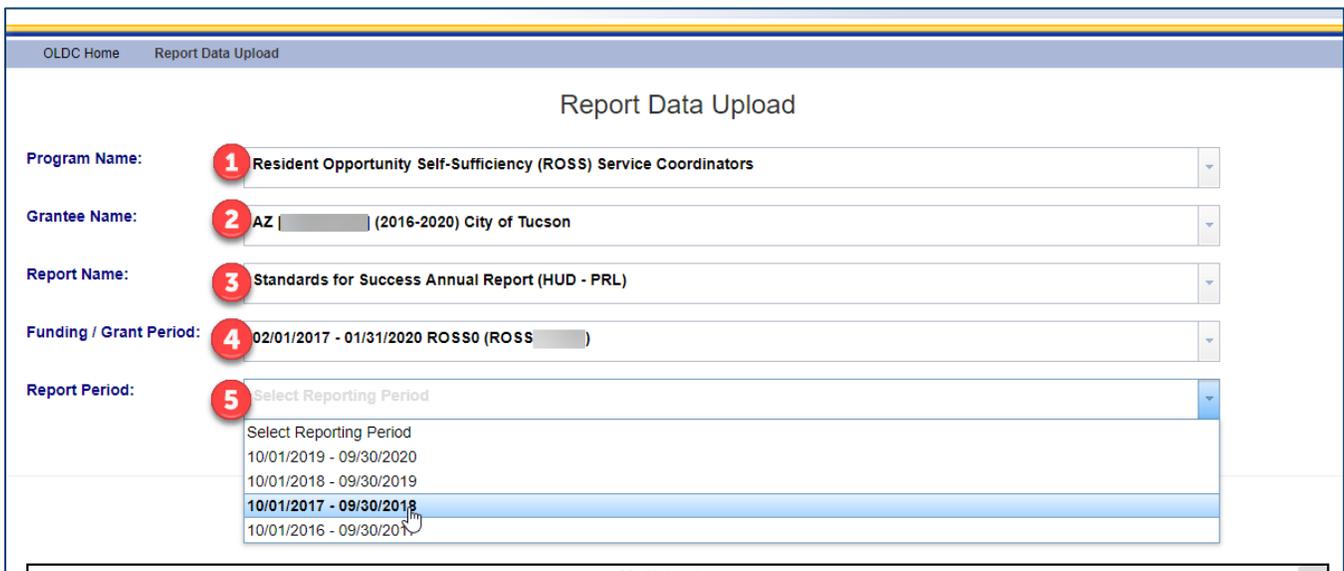
Rows : 10 ▼ ◀ 1 ▶

3. The “Report Data Upload” screen appears. Select a **Program Name** from the first drop-down list.
4. Select a **Grantee Name** from the second drop-down list.
5. Select a **Report Name** from the third drop-down list.



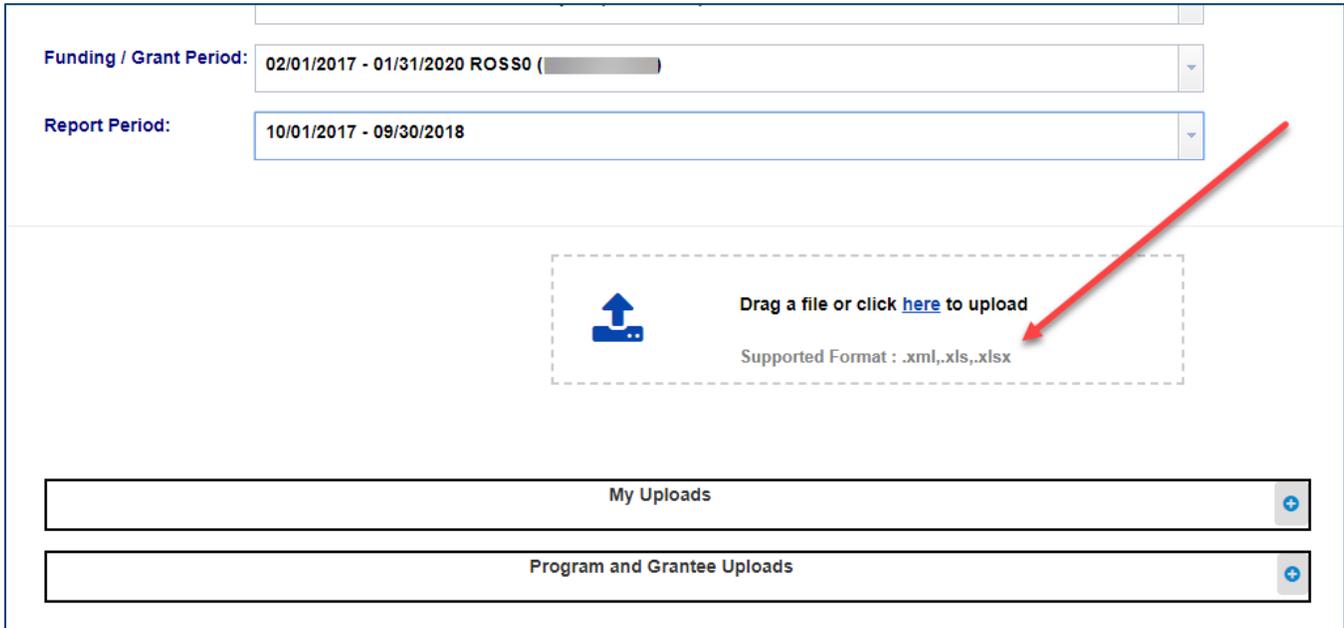
The screenshot shows the 'Report Data Upload' interface. At the top, there is a navigation bar with 'OLDC Home' and 'Report Data Upload' links, and a user login status 'Last Login: 09/20/2018 14:13:26 PM'. The main title is 'Report Data Upload'. Below the title, there are three dropdown menus, each with a red circle containing a number: 1. 'Program Name' is set to 'Resident Opportunity Self-Sufficiency (ROSS) Service Coordinators'. 2. 'Grantee Name' is set to 'AZ [redacted] (2016-2020) City of Tucson'. 3. 'Report Name' is set to 'Standards for Success Annual Report (HUD - PRL)'. The dropdown menu for 'Report Name' is open, showing a list of options with 'Standards for Success Annual Report (HUD - PRL)' selected. At the bottom, there is a 'My Uploads' button.

6. The screen refreshes and two additional drop-down lists appear. Select the **Funding / Grant Period** from the fourth drop-down list.
7. Select the **Report Period** from the fifth drop-down list.



The screenshot shows the 'Report Data Upload' interface after two additional dropdown menus have appeared. The first three dropdown menus are the same as in the previous screenshot. The fourth dropdown menu, 'Funding / Grant Period', is set to '02/01/2017 - 01/31/2020 ROSS0 (ROSS [redacted])'. The fifth dropdown menu, 'Report Period', is set to '10/01/2017 - 09/30/2018'. The dropdown menu for 'Report Period' is open, showing a list of options with '10/01/2017 - 09/30/2018' selected. At the bottom, there is a 'My Uploads' button.

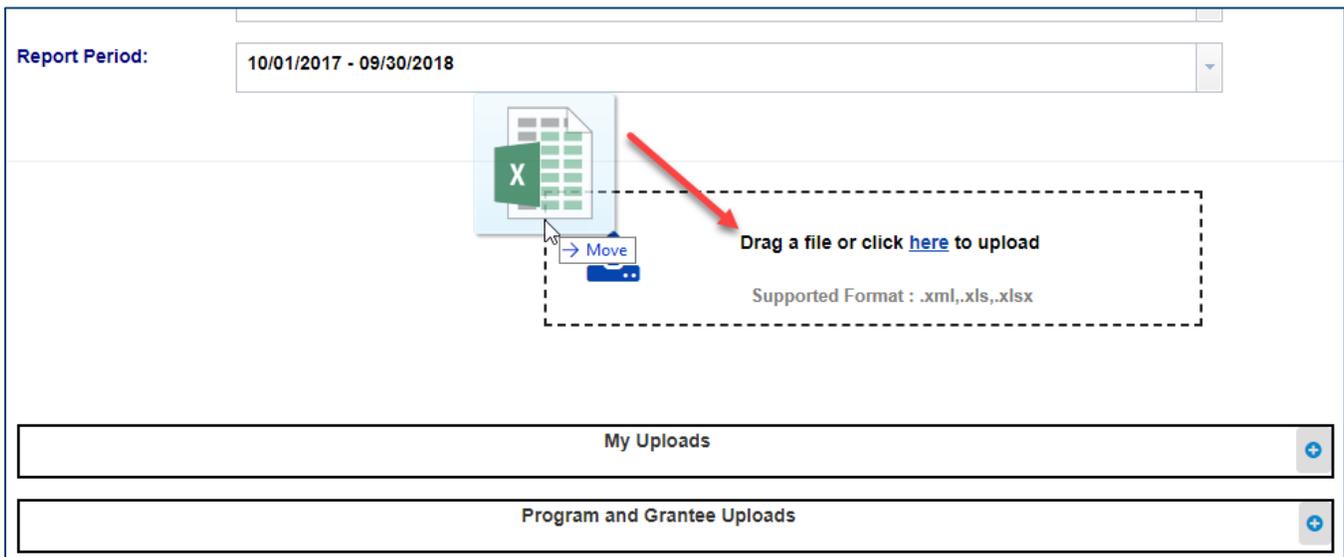
8. The screen refreshes and the *File Upload* box appears.



The screenshot shows a web interface with two dropdown menus at the top. The first is labeled "Funding / Grant Period:" and has the value "02/01/2017 - 01/31/2020 ROSSO". The second is labeled "Report Period:" and has the value "10/01/2017 - 09/30/2018". Below these is a dashed box containing an upload icon (a blue square with a white arrow pointing up) and the text "Drag a file or click [here](#) to upload". Below this text is "Supported Format : .xml,.xls,.xlsx". A red arrow points from the top right towards the upload icon. At the bottom, there are two horizontal bars: the top one is labeled "My Uploads" and the bottom one is labeled "Program and Grantee Uploads", both with a plus sign icon on the right.

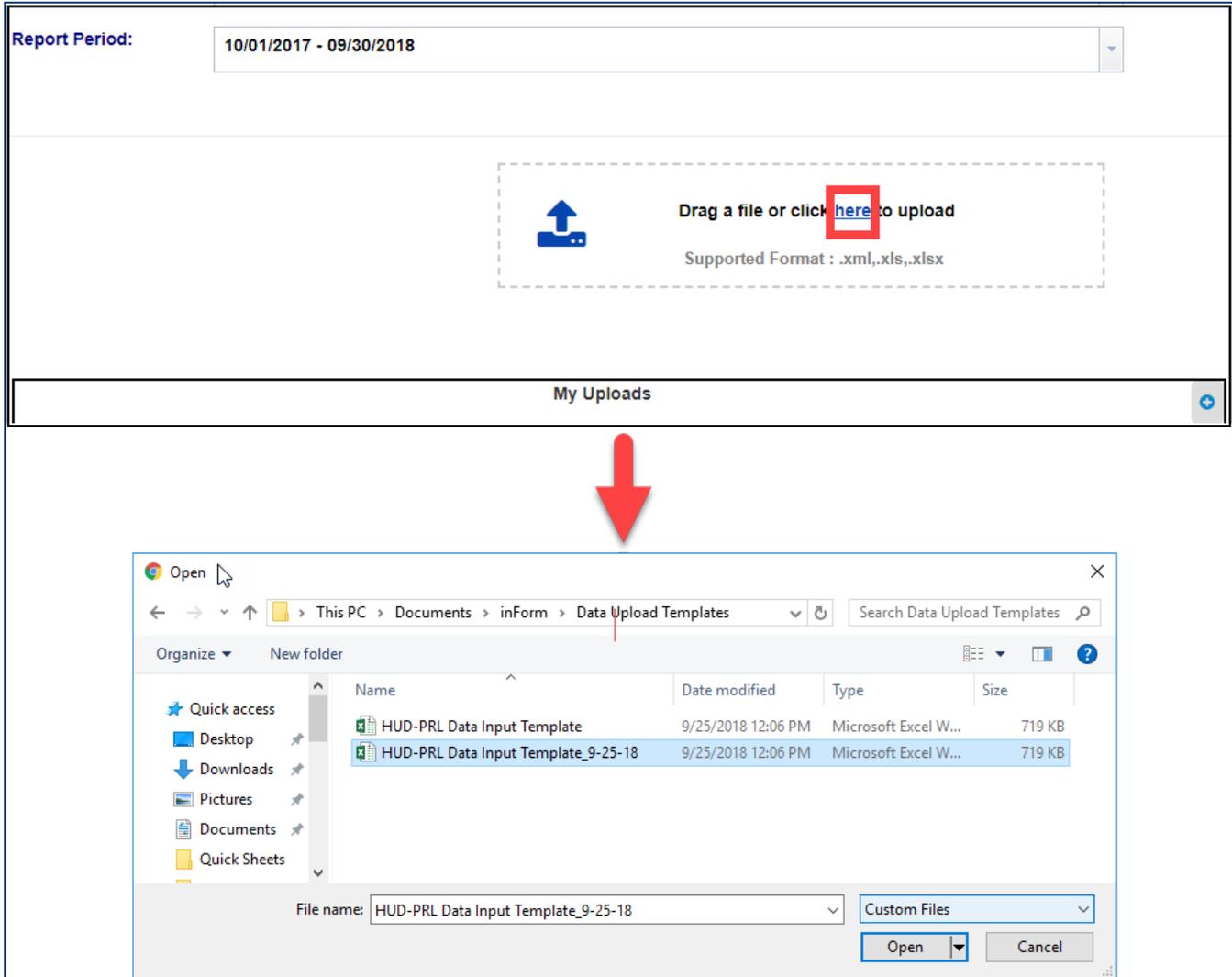
9. Upload the file in one of two ways:

- **Option 1:** Drag and drop the completed template from your computer to the *File Upload* box.



This screenshot is similar to the previous one, showing the same dropdown menus and upload box. However, a file icon (a green square with a white 'X' on a grid background) is being dragged from the left towards the upload box. A mouse cursor is over the file icon, and a small "Move" tooltip is visible. A red arrow points from the file icon towards the upload box. The rest of the interface, including the "My Uploads" and "Program and Grantee Uploads" bars, is the same as in the previous screenshot.

- **Option 2:** Select the here link from the *File Upload* box and navigate to the completed template to add.

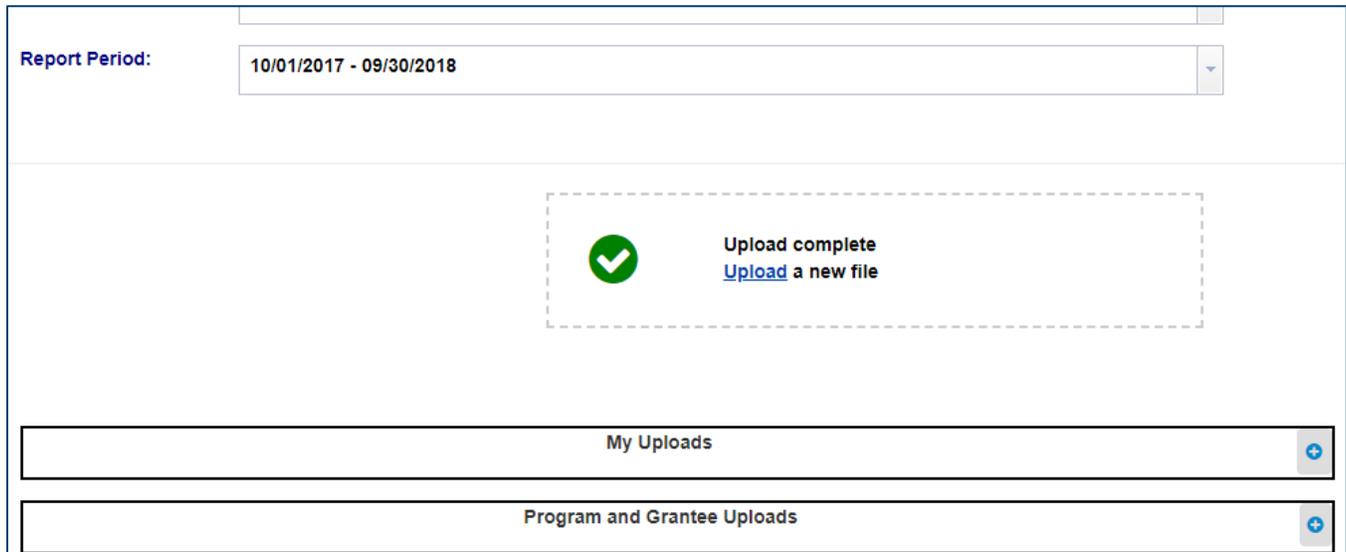


The screenshot shows the OLDC upload interface. At the top, there is a "Report Period:" dropdown menu set to "10/01/2017 - 09/30/2018". Below this is a dashed box containing an upload icon and the text "Drag a file or click [here](#) to upload". The word "here" is highlighted with a red square. Below the dashed box is a "My Uploads" section. A large red arrow points from the "here" link to a Windows File Explorer window. The File Explorer window shows the path "This PC > Documents > inForm > Data Upload Templates". It contains a table of files:

Name	Date modified	Type	Size
HUD-PRL Data Input Template	9/25/2018 12:06 PM	Microsoft Excel W...	719 KB
HUD-PRL Data Input Template_9-25-18	9/25/2018 12:06 PM	Microsoft Excel W...	719 KB

The "File name:" field at the bottom of the File Explorer window is set to "HUD-PRL Data Input Template\_9-25-18". The "Open" button is highlighted.

10. The “Upload complete” message appears. A link is available to upload another file if needed.



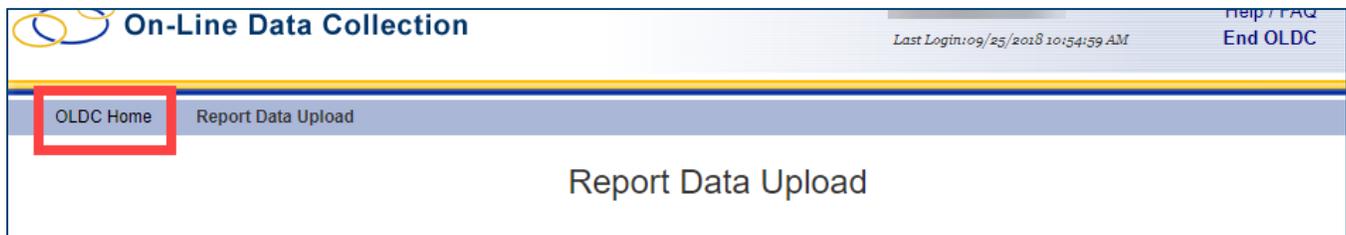
Report Period: 10/01/2017 - 09/30/2018


**Upload complete**  
[Upload a new file](#)

My Uploads +

Program and Grantee Uploads +

11. Once the file is successfully uploaded it is in the *Saved* status. The report must still be Validated, Certified, and Submitted before the process is complete. Return to the main menu clicking the **OLDC Home** link.

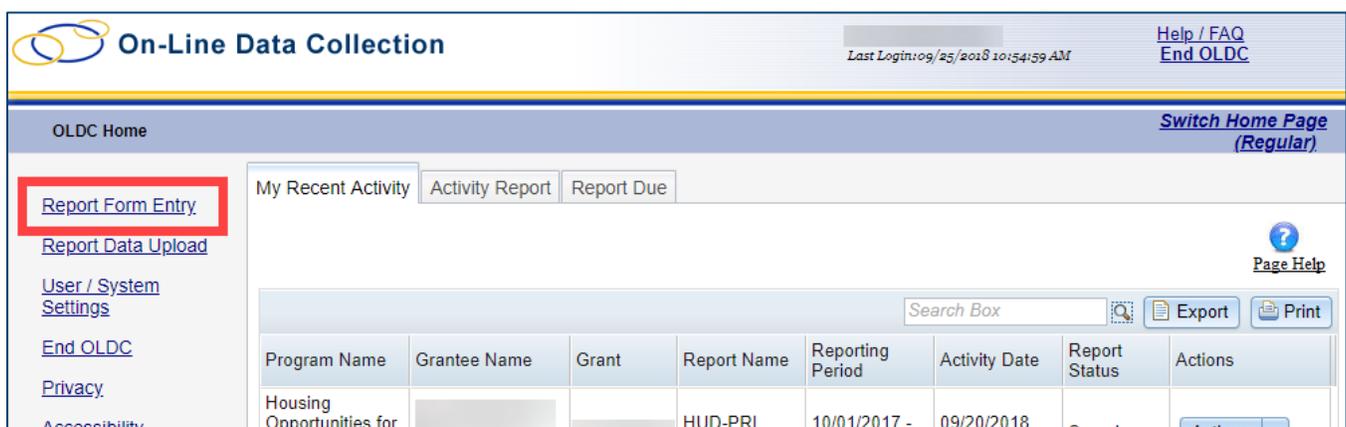


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End OLDC  
Last Login: 09/25/2018 10:54:59 AM

OLDC Home Report Data Upload

## Report Data Upload

12. The “OLDC Home” screen appears. Click the link **Report Form Entry**.



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End OLDC  
Last Login: 09/25/2018 10:54:59 AM

OLDC Home Switch Home Page  
(Regular)

My Recent Activity Activity Report Report Due

**Report Form Entry**  
[Report Data Upload](#)  
[User / System Settings](#)  
[End OLDC](#)  
[Privacy](#)  
[Accessibility](#)

Page Help

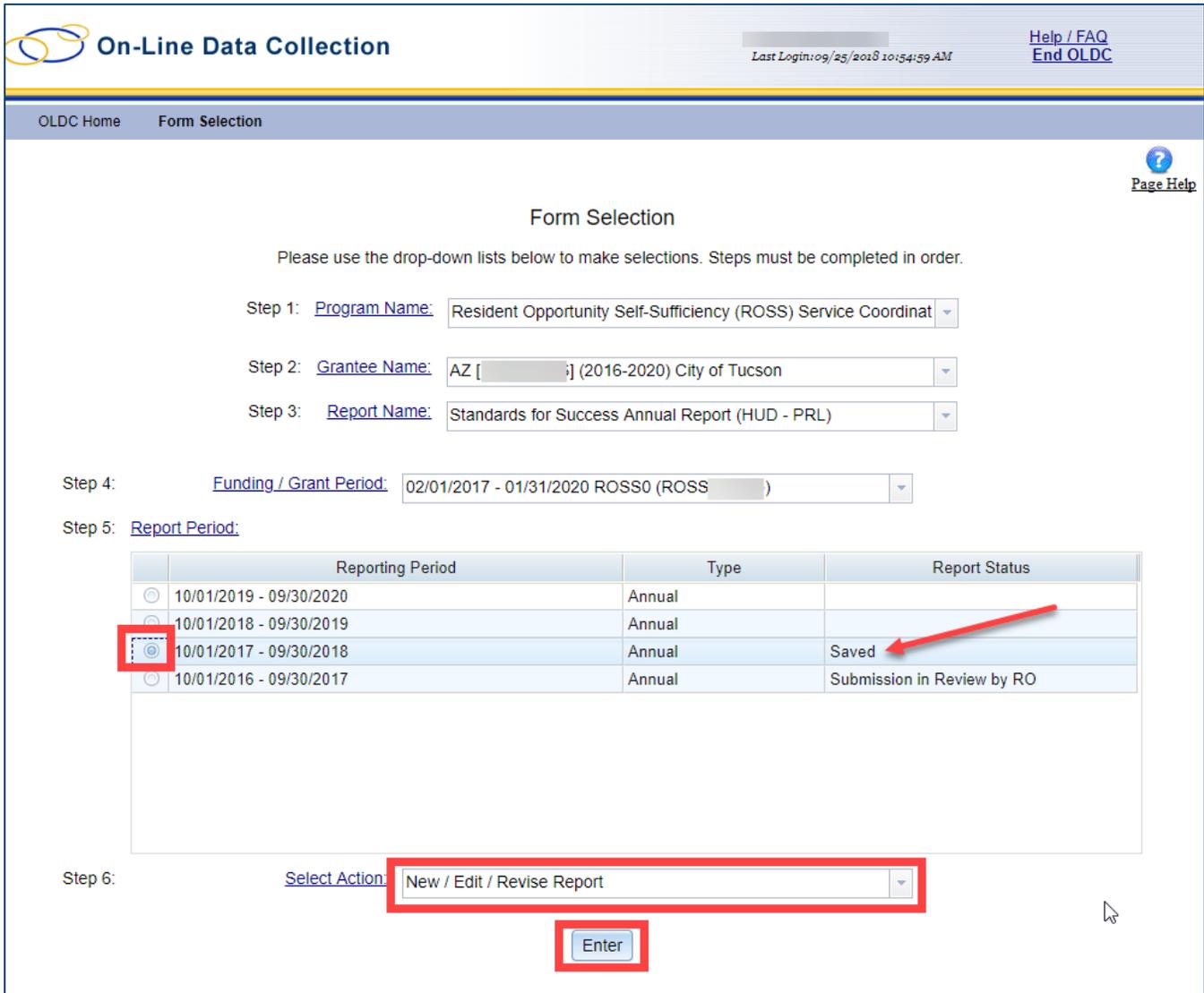
Search Box Export Print

Program Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
Housing Opportunities for			HUD-PRL	10/01/2017 -	09/20/2018	Saved	Actions

13. The “Form Selection” screen appears. Select the **Program Name, Grantee Name, Report Name, Funding / Grant Period,** and **Report Period.**

**Tip:** The Report Status is Saved.

14. Select the **Action New / Edit / Revise Report** and then click the **Enter** button.



On-Line Data Collection

Last Login: 09/25/2018 10:54:59 AM

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[End OLDC](#)

OLDC Home Form Selection

[Page Help](#)

### Form Selection

Please use the drop-down lists below to make selections. Steps must be completed in order.

Step 1: [Program Name](#): Resident Opportunity Self-Sufficiency (ROSS) Service Coordinat

Step 2: [Grantee Name](#): AZ [redacted] (2016-2020) City of Tucson

Step 3: [Report Name](#): Standards for Success Annual Report (HUD - PRL)

Step 4: [Funding / Grant Period](#): 02/01/2017 - 01/31/2020 ROSS0 (ROSS [redacted])

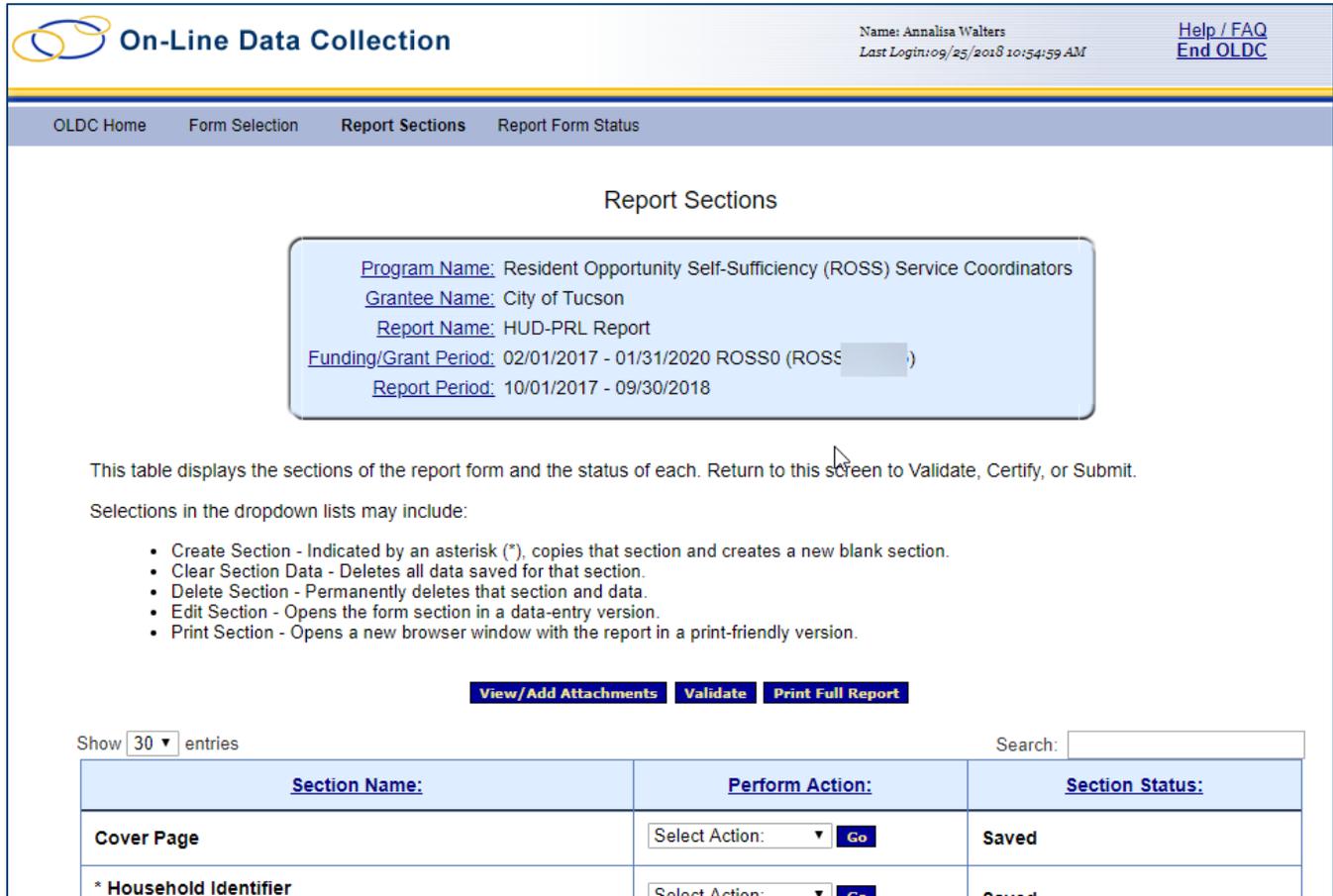
Step 5: [Report Period](#):

	Reporting Period	Type	Report Status
<input type="radio"/>	10/01/2019 - 09/30/2020	Annual	
<input type="radio"/>	10/01/2018 - 09/30/2019	Annual	
<input checked="" type="radio"/>	10/01/2017 - 09/30/2018	Annual	Saved
<input type="radio"/>	10/01/2016 - 09/30/2017	Annual	Submission in Review by RO

Step 6: [Select Action](#): New / Edit / Revise Report

Enter

15. The “Report Sections” screen appears.



**On-Line Data Collection** Name: Annalisa Walters Last Login: 09/25/2018 10:54:59 AM [Help / FAQ](#) [End OLDC](#)

OLDC Home Form Selection **Report Sections** Report Form Status

### Report Sections

Program Name: Resident Opportunity Self-Sufficiency (ROSS) Service Coordinators  
Grantee Name: City of Tucson  
Report Name: HUD-PRL Report  
Funding/Grant Period: 02/01/2017 - 01/31/2020 ROSS0 (ROSS [redacted])  
Report Period: 10/01/2017 - 09/30/2018

This table displays the sections of the report form and the status of each. Return to this screen to Validate, Certify, or Submit.

Selections in the dropdown lists may include:

- Create Section - Indicated by an asterisk (\*), copies that section and creates a new blank section.
- Clear Section Data - Deletes all data saved for that section.
- Delete Section - Permanently deletes that section and data.
- Edit Section - Opens the form section in a data-entry version.
- Print Section - Opens a new browser window with the report in a print-friendly version.

[View/Add Attachments](#) [Validate](#) [Print Full Report](#)

Show  entries Search:

<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Cover Page	Select Action: <input type="button" value="Go"/>	Saved
* Household Identifier	Select Action: <input type="button" value="Go"/>	Saved

16. From “Report Sections”, users with the assigned authority perform the following actions:

- Validate
- Certify (Click to sign on the Cover Page)
- Submit (return to the Report Sections screen to submit)

17. Once submitted, the report is received by the Grantor.

### My Uploads

Towards the bottom of the “Report Data Upload” screen, click the **blue plus sign** to expand the *My Uploads* bar and view the status of your uploaded files.

### Report Data Upload

**Program Name:**

**Grantee Name:**

**Report Name:**

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**My Uploads** +

**Program and Grantee Uploads** +

All uploaded files appear. Click the **down arrow** to view more information about an uploaded file.

**My Uploads** -

Q

Show 5 entries ◀ ▶ 1 ▶▶ ▶

File Name	Status	Date Uploaded	Actions
▼ HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	
<span style="border: 1px solid red; padding: 2px;">▼</span> HUD-PRL Data Input Template_test8.xlsx		08/20/2018 03:36:49 PM	
▼ download1.xml		05/21/2018 04:16:16 PM	

◀ ▶ 1 ▶▶ ▶

**Program and Grantee Uploads** +

The row expands, and upload details are visible.

My Uploads -

🔍

Show 5 entries ⏪ 1 ⏩

File Name	Status	Date Uploaded	Actions
▼ HUD-PRL Data Input Template_9-25-18.xlsx	● Failed	09/25/2018 12:24:37 PM	
▲ HUD-PRL Data Input Template_test8.xlsx		08/20/2018 03:36:49 PM	

Report Name	Updated On	Uploaded By	Reporting Period	Report Status
→ download1.xml	08/20/2018 03:37:23 PM		-	
▼ download1.xml			05/21/2018 04:16:16 PM	

⏪ 1 ⏩

### Program and Grantee Uploads

Click **blue plus sign** to expand the *Program and Grantee Uploads* bar and filter your uploaded files by Program Name and Grantee Name.

My Uploads +

Program and Grantee Uploads +

Select the Program Name and the Grantee Name from the drop-down lists and the list of uploaded files appears.

My Uploads +

Program and Grantee Uploads -

**Program Name:** Resident Opportunity Self-Sufficiency (ROSS) Service Coordinators

**Grantee Name:** AZ [ 866000266] (2016-2020) City of Tucson

Q

Show 5 entries

File Name	Status	Date Uploaded	Actions
<span style="border: 1px solid gray; padding: 2px;">▼</span> HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	

◀ ▶ 1 ◀ ▶

Click the **down arrow** to view more information about an uploaded file.

My Uploads +

Program and Grantee Uploads -

**Program Name:** Resident Opportunity Self-Sufficiency (ROSS) Service Coordinators

**Grantee Name:** AZ [ 866000266] (2016-2020) City of Tucson

Q

Show 5 entries

File Name	Status	Date Uploaded	Actions
<span style="border: 2px solid red; padding: 2px;">▼</span> HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	

◀ ▶ 1 ◀ ▶