

## 5. Customizing Your Reports

In IDIS some reports can be customized to your preference. In this section you will learn the types of reports that you can find in the IDIS reporting system, which reports you can customize, and the different features available for customization.

### 5.1 Types of Reports

There are two types of reports in IDIS: Document Reports and Grid Reports. You can tell the difference between them by looking at the icons located at the left side of the report's name.



#### Document Reports

Document Reports are preformatted reports. You **cannot** make any customizations to them. This type of report is ready to be saved or printed for your review.



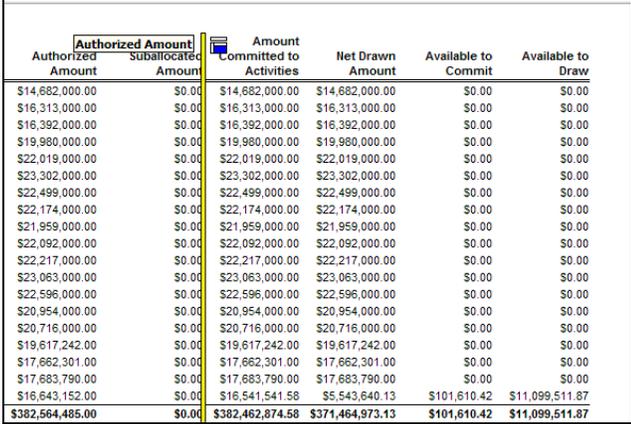
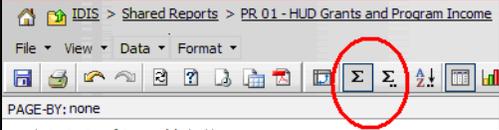
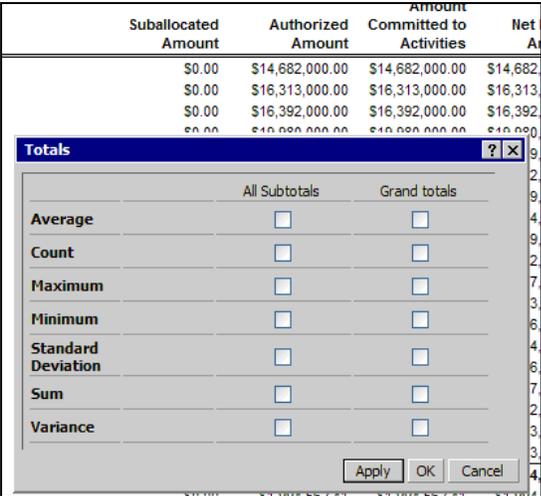
#### Grid Reports

Grid Reports are reports that you can customized in different ways. Section 5.2 will explain to you the features that you can use to customize your Grid Reports.

### 5.2 Grid Reports Customization

You can customize the content and appearance of your Grid Reports. This section describes some of the key features that you can use to customize your Grid Reports. Table 3 describes the most useful features customizing your grid reports.

**Table 3. Features to Customize Your Grid Reports**

Feature	Example																																																																																																																														
<p><b>Modify Column Order</b></p> <p>Once a report is displayed in the window, you can easily drag and move columns.</p> <p>Using the mouse, left-click on a particular column, and then drag it to the left or right.</p>	<p>In the following example, the user is moving the <b>Authorized Amount</b> column to the right of <b>Suballocated Amount</b>.</p>  <table border="1" data-bbox="738 401 1369 825"> <thead> <tr> <th>Authorized Amount</th> <th>Suballocated Amount</th> <th>Amount Committed to Activities</th> <th>Net Drawn Amount</th> <th>Available to Commit</th> <th>Available to Draw</th> </tr> </thead> <tbody> <tr><td>\$14,682,000.00</td><td>\$0.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,313,000.00</td><td>\$0.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,392,000.00</td><td>\$0.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$19,980,000.00</td><td>\$0.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,019,000.00</td><td>\$0.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$23,302,000.00</td><td>\$0.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,499,000.00</td><td>\$0.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,174,000.00</td><td>\$0.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$21,959,000.00</td><td>\$0.00</td><td>\$21,959,000.00</td><td>\$21,959,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,092,000.00</td><td>\$0.00</td><td>\$22,092,000.00</td><td>\$22,092,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,217,000.00</td><td>\$0.00</td><td>\$22,217,000.00</td><td>\$22,217,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$23,063,000.00</td><td>\$0.00</td><td>\$23,063,000.00</td><td>\$23,063,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$22,596,000.00</td><td>\$0.00</td><td>\$22,596,000.00</td><td>\$22,596,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$20,954,000.00</td><td>\$0.00</td><td>\$20,954,000.00</td><td>\$20,954,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$20,716,000.00</td><td>\$0.00</td><td>\$20,716,000.00</td><td>\$20,716,000.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$19,617,242.00</td><td>\$0.00</td><td>\$19,617,242.00</td><td>\$19,617,242.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$17,662,301.00</td><td>\$0.00</td><td>\$17,662,301.00</td><td>\$17,662,301.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$17,683,790.00</td><td>\$0.00</td><td>\$17,683,790.00</td><td>\$17,683,790.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr><td>\$16,643,152.00</td><td>\$0.00</td><td>\$16,541,541.58</td><td>\$5,543,640.13</td><td>\$101,610.42</td><td>\$11,099,511.87</td></tr> <tr><td><b>\$382,564,485.00</b></td><td><b>\$0.00</b></td><td><b>\$382,462,874.58</b></td><td><b>\$371,464,973.13</b></td><td><b>\$101,610.42</b></td><td><b>\$11,099,511.87</b></td></tr> </tbody> </table>	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available to Draw	\$14,682,000.00	\$0.00	\$14,682,000.00	\$14,682,000.00	\$0.00	\$0.00	\$16,313,000.00	\$0.00	\$16,313,000.00	\$16,313,000.00	\$0.00	\$0.00	\$16,392,000.00	\$0.00	\$16,392,000.00	\$16,392,000.00	\$0.00	\$0.00	\$19,980,000.00	\$0.00	\$19,980,000.00	\$19,980,000.00	\$0.00	\$0.00	\$22,019,000.00	\$0.00	\$22,019,000.00	\$22,019,000.00	\$0.00	\$0.00	\$23,302,000.00	\$0.00	\$23,302,000.00	\$23,302,000.00	\$0.00	\$0.00	\$22,499,000.00	\$0.00	\$22,499,000.00	\$22,499,000.00	\$0.00	\$0.00	\$22,174,000.00	\$0.00	\$22,174,000.00	\$22,174,000.00	\$0.00	\$0.00	\$21,959,000.00	\$0.00	\$21,959,000.00	\$21,959,000.00	\$0.00	\$0.00	\$22,092,000.00	\$0.00	\$22,092,000.00	\$22,092,000.00	\$0.00	\$0.00	\$22,217,000.00	\$0.00	\$22,217,000.00	\$22,217,000.00	\$0.00	\$0.00	\$23,063,000.00	\$0.00	\$23,063,000.00	\$23,063,000.00	\$0.00	\$0.00	\$22,596,000.00	\$0.00	\$22,596,000.00	\$22,596,000.00	\$0.00	\$0.00	\$20,954,000.00	\$0.00	\$20,954,000.00	\$20,954,000.00	\$0.00	\$0.00	\$20,716,000.00	\$0.00	\$20,716,000.00	\$20,716,000.00	\$0.00	\$0.00	\$19,617,242.00	\$0.00	\$19,617,242.00	\$19,617,242.00	\$0.00	\$0.00	\$17,662,301.00	\$0.00	\$17,662,301.00	\$17,662,301.00	\$0.00	\$0.00	\$17,683,790.00	\$0.00	\$17,683,790.00	\$17,683,790.00	\$0.00	\$0.00	\$16,643,152.00	\$0.00	\$16,541,541.58	\$5,543,640.13	\$101,610.42	\$11,099,511.87	<b>\$382,564,485.00</b>	<b>\$0.00</b>	<b>\$382,462,874.58</b>	<b>\$371,464,973.13</b>	<b>\$101,610.42</b>	<b>\$11,099,511.87</b>
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<p><b>Totals and Subtotals</b></p> <p>You can add and modify totals and subtotals.</p> <p>Click the <b>Sigma</b> icon to display the <b>Totals/Subtotals</b> menu:</p> 	 <table border="1" data-bbox="784 856 1325 1352"> <thead> <tr> <th></th> <th>Suballocated Amount</th> <th>Authorized Amount</th> <th>Amount Committed to Activities</th> <th>Net A</th> </tr> </thead> <tbody> <tr><td></td><td>\$0.00</td><td>\$14,682,000.00</td><td>\$14,682,000.00</td><td>\$14,682</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,313,000.00</td><td>\$16,313,000.00</td><td>\$16,313</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,392,000.00</td><td>\$16,392,000.00</td><td>\$16,392</td></tr> <tr><td></td><td>\$0.00</td><td>\$19,980,000.00</td><td>\$19,980,000.00</td><td>\$19,980</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,019,000.00</td><td>\$22,019,000.00</td><td>\$22,019</td></tr> <tr><td></td><td>\$0.00</td><td>\$23,302,000.00</td><td>\$23,302,000.00</td><td>\$23,302</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,499,000.00</td><td>\$22,499,000.00</td><td>\$22,499</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,174,000.00</td><td>\$22,174,000.00</td><td>\$22,174</td></tr> <tr><td></td><td>\$0.00</td><td>\$21,959,000.00</td><td>\$21,959,000.00</td><td>\$21,959</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,092,000.00</td><td>\$22,092,000.00</td><td>\$22,092</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,217,000.00</td><td>\$22,217,000.00</td><td>\$22,217</td></tr> <tr><td></td><td>\$0.00</td><td>\$23,063,000.00</td><td>\$23,063,000.00</td><td>\$23,063</td></tr> <tr><td></td><td>\$0.00</td><td>\$22,596,000.00</td><td>\$22,596,000.00</td><td>\$22,596</td></tr> <tr><td></td><td>\$0.00</td><td>\$20,954,000.00</td><td>\$20,954,000.00</td><td>\$20,954</td></tr> <tr><td></td><td>\$0.00</td><td>\$20,716,000.00</td><td>\$20,716,000.00</td><td>\$20,716</td></tr> <tr><td></td><td>\$0.00</td><td>\$19,617,242.00</td><td>\$19,617,242.00</td><td>\$19,617</td></tr> <tr><td></td><td>\$0.00</td><td>\$17,662,301.00</td><td>\$17,662,301.00</td><td>\$17,662</td></tr> <tr><td></td><td>\$0.00</td><td>\$17,683,790.00</td><td>\$17,683,790.00</td><td>\$17,683</td></tr> <tr><td></td><td>\$0.00</td><td>\$16,643,152.00</td><td>\$16,543,640.13</td><td>\$16,643</td></tr> <tr><td></td><td>\$0.00</td><td>\$382,462,874.58</td><td>\$371,464,973.13</td><td>\$382,462</td></tr> </tbody> </table>		Suballocated Amount	Authorized Amount	Amount Committed to Activities	Net A		\$0.00	\$14,682,000.00	\$14,682,000.00	\$14,682		\$0.00	\$16,313,000.00	\$16,313,000.00	\$16,313		\$0.00	\$16,392,000.00	\$16,392,000.00	\$16,392		\$0.00	\$19,980,000.00	\$19,980,000.00	\$19,980		\$0.00	\$22,019,000.00	\$22,019,000.00	\$22,019		\$0.00	\$23,302,000.00	\$23,302,000.00	\$23,302		\$0.00	\$22,499,000.00	\$22,499,000.00	\$22,499		\$0.00	\$22,174,000.00	\$22,174,000.00	\$22,174		\$0.00	\$21,959,000.00	\$21,959,000.00	\$21,959		\$0.00	\$22,092,000.00	\$22,092,000.00	\$22,092		\$0.00	\$22,217,000.00	\$22,217,000.00	\$22,217		\$0.00	\$23,063,000.00	\$23,063,000.00	\$23,063		\$0.00	\$22,596,000.00	\$22,596,000.00	\$22,596		\$0.00	\$20,954,000.00	\$20,954,000.00	\$20,954		\$0.00	\$20,716,000.00	\$20,716,000.00	\$20,716		\$0.00	\$19,617,242.00	\$19,617,242.00	\$19,617		\$0.00	\$17,662,301.00	\$17,662,301.00	\$17,662		\$0.00	\$17,683,790.00	\$17,683,790.00	\$17,683		\$0.00	\$16,643,152.00	\$16,543,640.13	\$16,643		\$0.00	\$382,462,874.58	\$371,464,973.13	\$382,462																					
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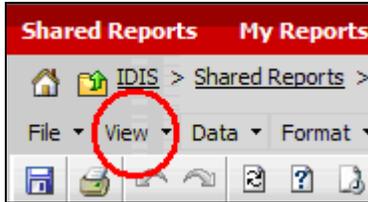


**Feature** | **Example**

**Grouping Data Using Parameters**

The **Page By** functionality allows you to dynamically slice and dice the data and group it by various parameters.

To enable **Page by**, select the **View** menu, and then **Page By Selection**.



The **Page By** section will be displayed as shown in the example.

In the following example, the **Program** attribute is being moved to the **Page-by** field:

A screenshot of the IDIS report interface showing a table with columns: Program, Fund Type, Grant Number, Authorized Amount, Suballocated Amount, and Amount Committed to Activities. The data is grouped by Program (CDBG).

Program	Fund Type	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities
CDBG	EN	B90MC550006	\$14,682,000.00	\$0.00	\$14,682,000.00
		B91MC550006	\$16,313,000.00	\$0.00	\$16,313,000.00
		B92MC550006	\$16,392,000.00	\$0.00	\$16,392,000.00
		B93MC550006	\$19,980,000.00	\$0.00	\$19,980,000.00
		B94MC550006	\$22,019,000.00	\$0.00	\$22,019,000.00
		B95MC550006	\$23,302,000.00	\$0.00	\$23,302,000.00

Now the report can be dynamically filtered by **Program**.

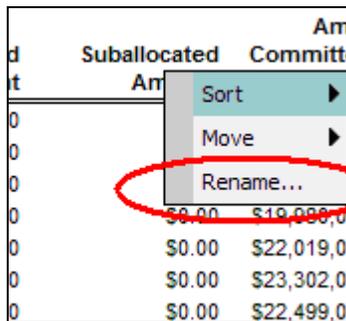
A screenshot of the IDIS report interface showing a dropdown menu for 'PAGE-BY: Program' with options: CDBG, HOPWA, HOME, and ESG. The report data below shows a list of grants for Fund Type EN.

Fund Type	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net
EN	B90MC550006	\$14,682,000.00	\$0.00	\$14,682,000.00	\$14,682
	B91MC550006	\$16,313,000.00	\$0.00	\$16,313,000.00	\$16,313
	B92MC550006	\$16,392,000.00	\$0.00	\$16,392,000.00	\$16,392
	B93MC550006	\$19,980,000.00	\$0.00	\$19,980,000.00	\$19,980
	B94MC550006	\$22,019,000.00	\$0.00	\$22,019,000.00	\$22,019
	B95MC550006	\$23,302,000.00	\$0.00	\$23,302,000.00	\$23,302
	B96MC550006	\$22,499,000.00	\$0.00	\$22,499,000.00	\$22,499
	B97MC550006	\$22,174,000.00	\$0.00	\$22,174,000.00	\$22,174
	B98MC550006	\$21,959,000.00	\$0.00	\$21,959,000.00	\$21,959
	B99MC550006	\$22,092,000.00	\$0.00	\$22,092,000.00	\$22,092
	B00MC550006	\$22,217,000.00	\$0.00	\$22,217,000.00	\$22,217
	B01MC550006	\$23,063,000.00	\$0.00	\$23,063,000.00	\$23,063

**Rename Report Objects**

You can rename report objects such as column headers to better fit your needs.

Rename the display name of report objects by right-clicking on a column and then selecting the **Rename** option.



In the following example, the user is renaming the column header from **Suballocated Amount** to **Allocated Amount**.

A screenshot of the IDIS report interface with a 'RENAME/EDIT OBJECTS' dialog box open. The 'Object' is 'Suballocated Amount' and the 'Name' is 'Allocated Amount'. The 'Definition' field contains '[Suballocated Amount]'. The background shows a table with columns: Authorized Amount, Suballocated Amount, Amount Committed to Activities, Net Drawn Amount, Available to Commit, and Available.

Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	Available to Commit	Available
\$14,682,000.00	\$0.00	\$14,682,000.00	\$14,682,000.00	\$0.00	
\$16,313,000.00	\$0.00	\$16,313,000.00	\$16,313,000.00	\$0.00	
\$16,392,000.00	\$0.00	\$16,392,000.00	\$16,392,000.00	\$0.00	
\$19,980,000.00	\$0.00	\$19,980,000.00	\$19,980,000.00	\$0.00	
\$22,019,000.00	\$0.00	\$22,019,000.00	\$22,019,000.00	\$0.00	
\$23,302,000.00	\$0.00	\$23,302,000.00	\$23,302,000.00	\$0.00	
\$22,499,000.00	\$0.00	\$22,499,000.00	\$22,499,000.00	\$0.00	
\$22,174,000.00	\$0.00	\$22,174,000.00	\$22,174,000.00	\$0.00	
\$21,959,000.00	\$0.00	\$21,959,000.00	\$21,959,000.00	\$0.00	
\$22,092,000.00	\$0.00	\$22,092,000.00	\$22,092,000.00	\$0.00	
\$22,217,000.00	\$0.00	\$22,217,000.00	\$22,217,000.00	\$0.00	
\$16,643,152.00	\$0.00	\$16,643,152.00	\$16,643,152.00	\$0.00	
<b>\$382,564,485.00</b>	<b>\$0.00</b>	<b>\$382,462,874.58</b>	<b>\$371,464,973.13</b>	<b>\$101,610.42</b>	<b>\$11,099,511.45</b>