

10. IDIS Reports

All IDIS reports are organized in folders. Inside each folder you can find at least one report. The report(s) can be: Grid Report(s) or Document Report(s). (Refer to Section 5 for type of reports).

This section shows the 64 folders with their corresponding reports available in IDIS. You will also find the report type, report description, run time parameters and sorting sequence for each report.

Due to space limitations, only a portion of each report's output is shown.

Ad-hoc Report Module

The IDIS Ad-hoc report module allows users to define and generate report queries on-the-fly by selecting from various buckets of objects and filters.

NOTE: Only users who have been granted the "ad-hoc" privilege in IDIS Online will be able to see and use this functionality. If you need access to the Ad-hoc Report Module please contact your Help Desk representative.

Folder Content

The Ad-hoc folder contains a report generator screen which must first be filled out by the user before the report is executed. Below is a screenshot of the Ad-hoc design view along with several objects that have been selected to generate the report.

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IDIS > Shared Reports > Ad-hoc Report Module > IDIS Online Ad-hoc Report Generator

Summary of your selections

- Choose from a list of available attributes* (Required)

Please select one or more attributes from the list below. At least one attribute is required in order to generate the report. This prompt requires at least one selection.

Available:

 - Activity Funding.Fund Type
 - Activity Funding.Grant Year
 - Activity Funding.Program Code
 - Activity Funding.Recipient Grantee Id
 - Activity Funding.Source Grantee Id
 - Activity Funding.Source Type
 - Draw.Line Item Number
 - Draw.Voucher Number
 - Draws.Batch Transmit Date
 - Draws.Fund Type Code

Selected:

 - Grant.Grant Year
 - Grant.Grant Number
 - Grantee.ID + Name
- Choose from a list of available metrics

Choose from a list of objects. No answer is required for this prompt.

Available:

 - Activity Funding.Drawn Amount
 - Activity Funding.Funded Amount
 - Draws.Drawn Amount
 - Grant.Activity Committed Amount
 - Grant.Drawn Pending Amount
 - Grant.Estimated Amount
 - Grant.Suballocated Amount
 - Receipt.Drawn Amount
 - Receipt.Receipt Amount

Selected:

 - Grant.Authorized Amount
 - Grant.Returned Amount
- Choose to filter on an attribute

Choose from all attributes in the 'Ad-hoc Hier' hierarchy. (similar to a "WHERE" clause in a SQL query) No answer is required for this prompt. An expression or a group of elements from one attribute is equivalent to one selection.

Search for:

Match case

Available:

 - Activity Funding.Fund Type

Selected:

 - Grant.Grant Number:

Unlike regular reports, in the Ad-hoc Report module users will first need to select the objects they want to include on the report. There are 4 main buckets of objects available:

Attributes – includes the list of objects that the user wants to report on. For example: Grant Number, Grant Year, etc

Metrics – includes calculation based objects that the user wants report on AND are numeric fields that can be aggregated. For example: Drawn Amount, Returned Amount, etc

Choose a filter – allows the user to filter for a specific element or group of elements. For example if the user wants to run a report only for a specific Grant Number or only for a specific Grantee

Qualify on a metric – allows the user to apply a certain rule based on a metric thus reducing the result set of the report. For example: Drawn Amount > 10,000. This filter will force the report to only return records for which the Drawn Amount is greater than \$10,000.

Grant.Grant Year	Grant.Grant Number	Grantee.ID + Name	Metrics	Grant.Authorized Amount	Grant.Returned Amount
1995	AL09H95F01			825,000	0
1996	AL09H96F02			825,000	0
1997	AL09H97F023	ALABAMA		986,000	0
1998	AL09H98F999	ALABAMA		1,042,000	0
1999	AL09H99F001	BIRMINGHAM		365,000	0
	AL09H99F999	ALABAMA		796,000	(14,394)
2000	ALH00F001	BIRMINGHAM		384,000	0
	ALH00F999	ALABAMA		843,000	0
2001	ALH01F001	BIRMINGHAM		429,000	0
	ALH01F999	ALABAMA		964,000	0

Once the report results are displayed users can manipulate the report the same as any other Grid Report. Please refer to the appropriate section to review additional functionality.