



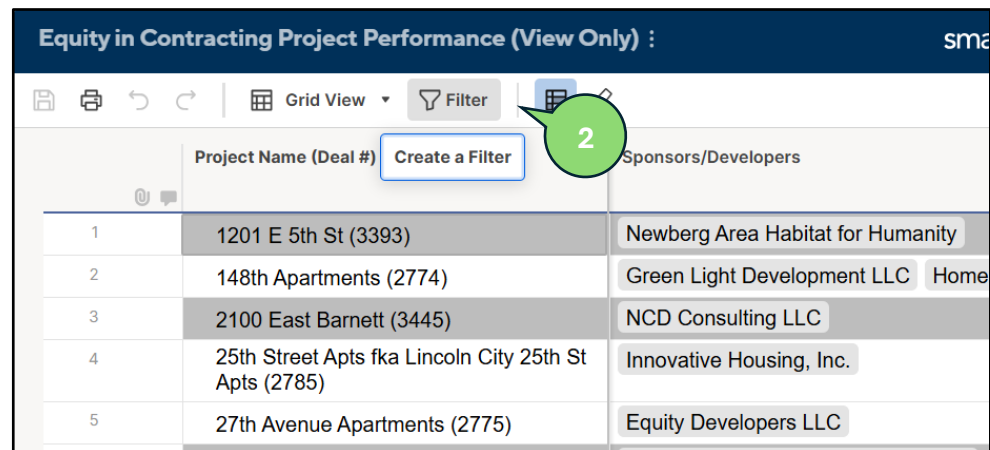
Search Guide: Equity in Contracting Project Performance Tracker

Oregon Housing and Community Services | Affordable Rental Housing

Description: This guide contains instructions for searching and filtering the [Equity in Contracting Project Performance Tracker](#) by project, by sponsor/developer, and by general contractor. If you've followed the steps in this guide and still cannot find the data you're looking for, please contact nicole.caldwell@hcs.oregon.gov for support.

Searching by Project Name/Deal Number

1. Open the [Equity in Contracting Project Performance Tracker](#).
2. Click "Filter" in the top left navigation bar.

A screenshot of the "Equity in Contracting Project Performance (View Only)" interface. The interface has a dark blue header with the title and a "sm" logo. Below the header is a navigation bar with icons for save, print, undo, redo, grid view, filter, and a plus icon. A green circle with the number "2" highlights the "Filter" button. Below the navigation bar is a table with three columns: "Project Name (Deal #)", "Create a Filter", and "Sponsors/Developers". The table contains five rows of data.

	Project Name (Deal #)	Create a Filter	Sponsors/Developers
1	1201 E 5th St (3393)		Newberg Area Habitat for Humanity
2	148th Apartments (2774)		Green Light Development LLC Home
3	2100 East Barnett (3445)		NCD Consulting LLC
4	25th Street Apts fka Lincoln City 25th St Apts (2785)		Innovative Housing, Inc.
5	27th Avenue Apartments (2775)		Equity Developers LLC



3. In the pop-up window, click the drop-down for "Select Field."

4. Select "Project Name (Deal #)."

Create New Filter

Show rows that match [all conditions](#)

Select Field 3

Row

Project Name (Deal #) 4

Sponsors/Developers

General Contractor

5. Click the "Enter value" field.

Create New Filter

Show rows that match [all conditions](#)

Project Name (Deal #) contains Enter Value 5

Select Field

☐ Include parent rows

6. Type the name or deal # of the project you're looking for.

7. Click "Apply."

Create New Filter

Show rows that match [all conditions](#)

Project Name (Deal #) contains 53rd Flats 6

Select Field 7

☐ Include parent rows



8. If the search results don't show the project you're looking for, click the arrow next to "Unnamed Filter" in the top left navigation bar.
9. Click the pencil icon.
10. In the pop-up window, adjust the project name or deal number you just searched. For example, search only part of the project name in case there is any variation.
11. Click "Apply."

This screenshot shows the top navigation bar of a web application titled "Community in Contracting Project Performance (View Only)". The bar includes a "Grid View" dropdown and an "Unnamed Filter" dropdown. A green callout bubble with the number 8 points to the arrow next to the "Unnamed Filter" dropdown. Below the navigation bar, a table lists project entries. The first entry is "53rd Flats (2664)". A second green callout bubble with the number 9 points to a pencil icon in the filter dropdown menu, which also shows a "Filter Off" option.This screenshot shows the "Edit Unnamed Filter" pop-up window. It contains a section titled "Show rows that match [all conditions](#)". Below this, there are two rows of filter criteria. The first row has a dropdown menu set to "Project Name (Deal #)", a "contains" operator, and a text input field containing "53rd Flats". A green callout bubble with the number 10 points to the "contains" operator. The second row has a dropdown menu set to "Select Field" and an empty text input field. A green callout bubble with the number 11 points to the "Apply" button at the bottom right of the window. Other buttons at the bottom include a trash icon, "Cancel", and "Apply".



Searching by Sponsor/Developer

1. Open the [Equity in Contracting Project Performance Tracker](#).
2. Click “Filter” in the top left navigation bar.

Equity in Contracting Project Performance (View Only) :

Grid View | Filter

	Project Name (Deal #)	Sponsors/Developers
1	1201 E 5th St (3393)	Newberg Area Habitat for Humanity
2	148th Apartments (2774)	Green Light Development LLC Home
3	2100 East Barnett (3445)	NCD Consulting LLC
4	25th Street Apts fka Lincoln City 25th St Apts (2785)	Innovative Housing, Inc.
5	27th Avenue Apartments (2775)	Equity Developers LLC

3. In the pop-up window, click the drop-down for “Select Field.”
4. Select “Sponsors/Developers.”

Create New Filter

Show rows that match [all conditions](#)

Select Field

- Row
- Project Name (Deal #)
- Sponsors/Developers
- General Contractor

Cancel Apply



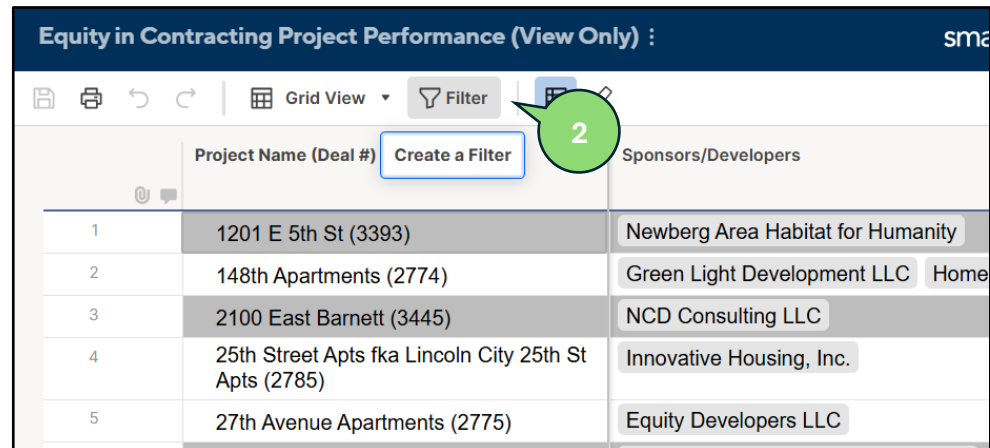
5. Click the small arrow in the “Select values...” field (furthest right).
6. Once you’ve found the sponsor or developer you want to filter by, check the box to the left of their name.
7. If you want to filter by multiple sponsors at once, check the box to the left of each of their names so that all are selected.
8. Click “Apply.”

This screenshot shows the "Create New Filter" dialog box. At the top, it says "Show rows that match [all conditions](#)". Below this are two rows of dropdown menus. The first row has "Sponsors/Developers" and "has any of". The second row has "Select Field" and an empty dropdown. To the left of these is a checkbox labeled "Include parent rows". On the right, there is a "Select values..." dropdown menu. A green callout bubble with the number "5" points to the small arrow in the top right corner of this dropdown. The dropdown menu is open, showing a list of options: "1 selected", "Bridge Meadows", "Brookings Community...", and "CASA of Oregon" (which is checked with a blue box). A green callout bubble with the number "6" points to the checkbox next to "CASA of Oregon".This screenshot shows the "Create New Filter" dialog box after the filter has been applied. The "Sponsors/Developers" dropdown now shows "CASA of Oregon". The "Select Field" dropdown is still empty. The "Include parent rows" checkbox is still unchecked. At the bottom right, there are three buttons: a trash icon, a "Cancel" button, and an "Apply" button. A green callout bubble with the number "8" points to the "Apply" button.



Searching by General Contractor

1. Open the [Equity in Contracting Project Performance Tracker](#).
2. Click “Filter” in the top left navigation bar.

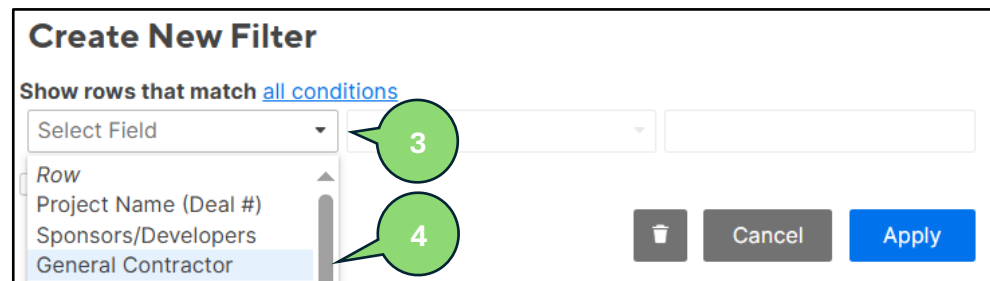


Equity in Contracting Project Performance (View Only) :

Grid View | Filter

	Project Name (Deal #)	Sponsors/Developers
1	1201 E 5th St (3393)	Newberg Area Habitat for Humanity
2	148th Apartments (2774)	Green Light Development LLC
3	2100 East Barnett (3445)	NCD Consulting LLC
4	25th Street Apts fka Lincoln City 25th St Apts (2785)	Innovative Housing, Inc.
5	27th Avenue Apartments (2775)	Equity Developers LLC

3. In the pop-up window, click the drop-down for “Select Field.”
4. Select “General Contractor.”



Create New Filter

Show rows that match [all conditions](#)

Select Field

Row

- Project Name (Deal #)
- Sponsors/Developers
- General Contractor

Cancel Apply



5. Click the small arrow in the “Select values...” field (furthest right).
6. Once you’ve found the general contractor you want to filter by, check the box to the left of their name.
7. If you want to filter by multiple general contractors at once, check the box to the left of each of their names so that all are selected.
8. Click “Apply.”

Create New Filter

Show rows that match [all conditions](#)

General Contractor has any of Select values...

Select Field

☐ Include parent rows

1 selected

- ☒ Beaudin Construction
- ☐ Blazer Industries
- ☐ Bogatay Co
- ☐ Bremik Construction

Beaudin Const

This screenshot shows the 'Create New Filter' dialog box. A green callout bubble with the number 5 points to the 'Select values...' dropdown menu. Another green callout bubble with the number 6 points to the checkbox next to 'Beaudin Construction' in the list of selected values.

Create New Filter

Show rows that match [all conditions](#)

General Contractor has any of Beaudin Construction

Select Field

☐ Include parent rows

8

Apply

This screenshot shows the 'Create New Filter' dialog box after the filter has been applied. A green callout bubble with the number 8 points to the 'Apply' button.