

Integrated Disbursement and Information System (IDIS) OnLine Quick Tips User Guide

U.S. Department of Housing and Urban Development (HUD)
Office of Community Planning and Development (CPD)



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Version 2.0

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1 Introduction

The Integrated Disbursement and Information System (IDIS) OnLine system is sponsored by the Office of Community Planning and Development (CPD) within the Department of Housing and Urban Development (HUD). IDIS OnLine is a real-time, web-based computer application that provides financial disbursement, tracking, and reporting activities for the CPD formula grant programs. IDIS OnLine enables HUD grantees to drawdown program funds and report on the activities and accomplishments outlined in each jurisdiction's Consolidated Plan. IDIS OnLine provides timely performance information regarding accomplishments achieved with the use of program funds, pursuant to the Government Performance and Results Act of 1993 (GPRA) and the specific requirements of the formula programs administered by CPD. IDIS OnLine programs include the Community Development Block Grant (CDBG) Program, HOME Investment Partnership Program (HOME), Emergency Shelter Grants (ESG), and Housing Opportunities for Persons with AIDS (HOPWA). IDIS OnLine also supports the American Recovery and Reinvestment Act (ARRA) grant programs Tax Credit Assistance Program (TCAP), CDBG Recovery (CDBG R), and Homelessness Prevention and Rapid Rehousing Program (HPRP). NOTE: HPRP grantees use IDIS OnLine for drawing funds only.

1.1 IDIS OnLine System Overview

IDIS OnLine is used by three different types of users:

- 1,100 CPD formula grant program participants located throughout the US
- HUD's 42 Field Offices (FOs)
- HUD Headquarters (HQ) staff

There are more than 14,000 active IDIS OnLine users.

IDIS OnLine Roles of Organization include the following:

Grantee – any organization receiving grant funds directly or indirectly from HUD to perform HUD-approved program work. A grantee is the “owner” of the program funds and is responsible for performance of the approved, CPD-funded projects and activities. All grantees are given a Unit of Government code and number (UOG CD and UOG NM) to identify them. Grantees can delegate some or all of their project activities to **subrecipients**, who are organizations that may or may not have access to IDIS OnLine. For example: in the HOME program, CHDOs do not have access to IDIS OnLine. Grantees can delegate some or all of their project activities to **subgrantees**, who receive funds for this work and who update these activities using IDIS OnLine. The HOME program has special rules and regulations for state subgrantees regarding usage of grant funds.

Other Entity is a special subgrantee organization receiving a subgrant and is identified as an Other Entity on the system.

Community Housing Development Organization (CHDO) is a special type of grantee that receives a set-aside subgrant.

CPD’s formula grants management process includes the following seven steps:

CPD 7-Step Grants Management Process

Step	Grants Management Process Description
Step 1	Develop and gain approval of 3 to 5 year Consolidated Plan that serves as: <ul style="list-style-type: none"> • A planning document for the jurisdiction • A single application for federal funds under HUD’s formula grant programs • A strategy to be followed in carrying out HUD’s performance government • An action plan that provides the basis for assessing performance
Step 2	Annually, create and gain approval of an Action Plan that describes the projects and assigns budget amounts for the upcoming plan year
Step 3	Receive Annual Funding under HUD formula grant programs and other sources
Step 4	Designate detailed Activities and related annual budgets under each project that can be measured to assess progress for the work being done
Step 5	Commit Funds for a given activity
Step 6	Drawdown and Disburse committed funds for an activity
Step 7	Report on program year accomplishments and performance

The role of IDIS OnLine in Grants Management is to begin supporting the grants management process after the planning stage. After a grantee signs a grant agreement with HUD, grant funds are then reported to IDIS OnLine and the grantee is ready to set up activities, drawdown funds, and report on the progress of each activity. IDIS OnLine supports the process through the transaction and performance reporting stage and feeds information into other CPD systems (Line of Credit Control System – LOCCS and Grants Management Process System – GMP).

1.2 IDIS OnLine User Technical Support Resources

If a user needs assistance while working on IDIS OnLine, there are several resources available. In addition to getting help from their local Field Office, they may also contact the following:

IDIS OnLine Quick Tips User Guide

Technical Assistance Unit (TAU) Hours of Operation:	Monday – Friday 8:15 a.m. - 7:00 p.m. (Eastern)
TAU Support Contact Information	
Toll Free Help Line	1-877-483-8282
Fax Number	1-703-553-8444
E-mail	Idis.help@hud.gov
IDIS ID/Password Resets	HUD National Help Desk Toll Free: 1-888-297-8689, Option 3
Additional information about IDIS OnLine	http://www.hud.gov/offices/cpd/systems/idis/index.cfm
IDIS OnLine login instructions	http://www.hud.gov/offices/cpd/systems/idis/idis.cfm

The IDIS OnLine Quick Tips User Guide serves to walk IDIS OnLine users step-by-step through the major IDIS OnLine system functionalities. The major functionalities covered in this guide include:

- Adding, Search/Edit, View, and Copy Projects
- Adding, Editing, and Funding Activities
- Creating and Approving Drawdowns/Vouchers
- Adding Receipts
- Search/Edit Receipts
- View Receipts
- View Receipt Accounts
- Adding Subfunds and Subgrants
- Editing a Grantee User Profile
- Editing Existing User Roles
- Viewing Existing User Roles

2 Logging into IDIS OnLine

- 1) Go to the **Log on to IDIS** web page:

<http://www.hud.gov/offices/cpd/systems/idis/idis.cfm>

- 2) Click the word **here** to get to the login screen.

The screenshot shows the IDIS OnLine website interface. On the left is a dark red navigation menu with the following items: 'Homes & Communities' (U.S. Department of Housing and Urban Development), 'Community Planning and Development', 'Online Systems/ Databases', 'IDIS' (with sub-items: Log on to IDIS, Getting Started, Training, Reporting and Guidance, Library), 'HUD news', 'Homes', 'Resources', 'Communities', 'Working with HUD', and 'Tools' (with sub-items: Webcasts, Mailing lists). The main content area has a header 'Community Planning & Development' and a sub-header 'Log on to IDIS'. Below this is a 'What's New' section with links to 'IDIS Online Data Download Documentation' and 'How to Run Reports in IDIS OnLine'. A '2009 Formula Grant Allocations' announcement is also present. A call to action says 'To log on to IDIS OnLine, click here.' and provides contact information for the IDIS helpdesk. A notice about 'Round 3 grantees' going live earlier than scheduled is also shown. The right sidebar contains several sections: 'Information by State' with a 'Print version' link, 'Email the CPD Web Team', 'Security Issues' with links for 'Keeping Your IDIS Account Active', 'ID and Password Assistance', and 'Separation of Duties', 'Helpful Numbers' with links for 'IDIS Password Reset' and 'Technical Assistance Unit', and 'Related Information' with a link for 'Access the IDIS Legacy Pseudo Region'.

- 3) **IDIS Login** page will appear (<https://www21.hud.gov/idis>)

- 4) Enter **Username** and **Password**

- I. Grantee users will use their C# as their Username. Their temporary password is the first initial capitalized and the last name with first letter capitalized. For example, if your name is ABRAHAM LINCOLN your temporary password will be ALincoln. They will be prompted to change their password immediately upon login. The new password must contain the following:

- At least 8 characters
- At least one capitalized letter
- At least one lower case letter
- At least one number
- At least one special character (any symbol, such as \$#@!&)

- II. HUD staff will use their regular H# as their Username with their regular network password

- 5) Next, click the **Login** button

The screenshot shows the IDIS Login page. On the left is a red sidebar with the 'Homes & Communities' logo and a navigation menu. The main content area has a white background with a red header bar. The page title is 'IDIS Login'. Below the title, there is a prompt: 'Please enter your Username (C***** or H*****) and Password to log in.' There are two input fields: 'Username:' and 'Password:'. Below the password field is a 'Login' button. At the bottom of the page, there is a footer with a 'USA.gov' logo, a 'Home' button, and contact information for the U.S. Department of Housing and Urban Development.

Homes & Communities
U.S. Department of Housing and Urban Development

Community Planning and Development

IDIS Login

Please enter your Username (C***** or H*****) and Password to log in.

Username:

Password:

USA.gov
Government Made Easy

[FOIA](#) [Privacy](#) [Web Policies and Important Links](#) [Home](#)

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455
[Find the address of a HUD office near you](#)

- 6) **IDIS Disclaimer** page will appear
- 7) Read disclaimer statement and click **I accept** button if you agree to the disclaimer.
- 8) If you have multiple profiles, the **Profile Selection** page will be displayed with all of your available profiles listed. Select your appropriate profile, next click **Select Profile** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS) **CDS**

Utilities
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Disclaimer
Review Data Collection Policy

You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of this system is prohibited and subject to criminal and civil penalties. Use of this system indicates consent to monitoring and recording.

|

9) **Welcome to the Integrated Disbursement and Information System** page will appear

10) Congratulations - you are now in IDIS OnLine!

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS) **CDS**

User ID: C32177
User Role: Grantee
Organization: BOSTON
- [Logout](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

Welcome to the Integrated Disbursement and Information System

IDIS News
No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

NOTE: CPD posts important news items about IDIS OnLine in the NEWS section. News may related to system outages, reports, tips, known errors, holiday hours, etc. **Please take a moment to read the NEWS each time you login; it may answer many of your questions!**

3. Projects

3.1 Add Projects

- 1) Click the **Projects/Activities** tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_3381. The main header reads 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. A navigation bar contains tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The 'Projects/Activities' tab is currently selected. On the left side, there is a user information box with fields for 'User ID: C01133', 'User Role: Grantee', and 'Organization: MILWAUKEE', along with a 'Logout' link. Below this are sections for 'Utilities' (Home, Data Downloads, Print Page, Help) and 'Links' (PDF Viewer, Support, CPD Home, HUD Home). The main content area features a 'Welcome to the Integrated Disbursement and Information System' message, an 'IDIS News' section with 'No news to display', and two warning messages: one about federal information misuse and another about session expiration. At the bottom, there is contact information for the U.S. Department of Housing and Urban Development, including the address, telephone, and TTY numbers.

- 2) Click the **Add** link on left side under **Project**
- 3) Enter in required data of **Program Year** and **Project Title**
- 4) Enter in additional information as needed, including **Add New Program Year**, **Grantee/PJ Project ID**, and/or **Description**
- 5) Click the **Save** button

Organization: MILWAUKEE - Logout	Project Add Project
Activity - Add - Search	<input type="button" value="Save"/> <input type="button" value="Reset"/>
Project - Add - Search - Copy	*Indicates Required Field Grantee/PJ Name: MILWAUKEE
Utilities - Home - Data Downloads - Print Page - Help	Program Year *Program Year: <input type="text"/> <input type="checkbox"/> Add New Program Year: <input type="text"/> (ex: yyyy)
Links - PDF Viewer - Support - CPD Home - HUD Home	IDIS Project ID: <input type="text"/> *Project Title: <input type="text"/> Grantee/PJ Project ID: <input type="text"/> Description: <input type="text"/>
	Allow Another Organization to Set up Activities under this Project: (tip) <input type="text" value="Select Organization"/>

3.2 Search/Edit Projects

- 1) Click the **Projects/Activities** tab at top of screen

The screenshot displays the IDIS web application interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" on the left, and the "CDS" logo on the right. A navigation bar contains tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Projects/Activities" tab is selected.

On the left side, a user profile box shows: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "- Logout" link. Below this are "Utilities" and "Links" sections, each with a list of links.

The main content area features a "Welcome to the Integrated Disbursement and Information System" message. Below this is an "IDIS News" section with the text "No news to display." To the right of the news section are two "Warning!" messages. The first warning states: "Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers." The second warning states: "Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session." Below the warnings is a note: "To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page." At the bottom right, there is a "Content updated Nov 14, 2008" note and contact information for the U.S. Department of Housing and Urban Development.

- 2) Enter applicable **Search Criteria**, including **Program Year**, **Program**, **Project Title**, **IDIS Project ID**, **Grantee/PJ Project ID**, and/or **Status**
- 3) Click the **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_3381. The main header is "Community Development Systems Integrated Disbursement & Information System (IDIS)". Below the header, there are navigation tabs: "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Projects/Activities" tab is selected. On the left side, there is a user information box showing "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE". Below this are links for "Logout", "Activity", "Project", "Utilities", and "Links". The main content area is titled "Project" and "Search Projects". It contains a "Search Criteria" section with the following fields: "Program Year" (dropdown), "Program" (dropdown), "Project Title" (text input), "IDIS Project ID" (text input), "Grantee/PJ Project ID" (text input), and "Status" (dropdown). There are "Search" and "Reset" buttons at the bottom of the search criteria section.

- 4) Search Results Page will appear
- 5) Click **Edit** under **Action** column to make any changes to the Project information

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ
Admin
Reports

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE

[- Logout](#)

Activity
[- Add](#)
[- Search](#)

Project
[- Add](#)
[- Search](#)
[- Copy](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Project

Search Projects

Search Criteria

Program Year: 2008
Program:
Project Title:

IDIS Project ID: 14
Grantee/PJ Project ID:
Status: Select

|

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2008	14		testing	MILWAUKEE, WI	Open	Edit View

- 6) User may now edit **Project Title**, **Grantee/PJ Project ID**, and/or **Description**
- 7) After making edits to project click the **Save** button

Organization: MILWAUKEE - Logout	Project Edit Project
Activity - Add - Search	<input type="button" value="Save"/> <input type="button" value="Return To Projects"/> <input type="button" value="View History"/> <input type="button" value="View Activities"/> <input type="button" value="Cancel Project"/>
Project - Add - Search - Copy	*Indicates Required Field Grantee/PJ Name: MILWAUKEE Program Year: 2008
Utilities - Home - Data Downloads - Print Page - Help	IDIS Project ID: 14 Status: Open *Project Title: <input type="text" value="testing"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	Grantee/PJ Project ID: <input type="text"/> Description: <input type="text"/>
	Allow Another Organization to Set up Activities under this Project: (tip) <input type="button" value="Select Organization"/>

3.3 View Projects

- 1) Click **Projects/Activities** tab at top of screen

The screenshot displays the IDIS web application interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" and the "CDS" logo. A navigation bar contains tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Projects/Activities" tab is selected.

On the left side, there is a user information box with the following details:
User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
A "- Logout" link is provided below.

Below the user information are two boxes: "Utilities" and "Links".
The "Utilities" box contains links for: Home, Data Downloads, Print Page, and Help.
The "Links" box contains links for: PDF Viewer, Support, CPD Home, and HUD Home.

The main content area features a "Welcome to the Integrated Disbursement and Information System" message. Below this is an "IDIS News" section with the text "No news to display." To the right of the news section are two warning messages:
1. "Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers."
2. "Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session."
Below the warnings is a note: "To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page."

At the bottom of the main content area, it says "Content updated Nov 14, 2008" and provides contact information for the U.S. Department of Housing and Urban Development: "451 7th Street S.W., Washington, DC 20410 Telephone: (202) 708-1112 TTY: (202) 708-1455".

- 2) Enter applicable **Search Criteria**, including **Program Year**, **Program**, **Project Title**, **IDIS Project ID**, **Grantee/PJ Project ID**, and/or **Status**
- 3) Click the **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_3381. The main header is "Community Development Systems Integrated Disbursement & Information System (IDIS)". Below the header, there are navigation tabs: "Projects/Activities" (highlighted), "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left side, there is a user information box with the following details:
User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
A "- Logout" link is provided below.

Below the user information, there are four menu sections:
1. **Activity**: "- Add", "- Search"
2. **Project**: "- Add", "- Search", "- Copy"
3. **Utilities**: "- Home", "- Data Downloads", "- Print Page", "- Help"
4. **Links**: "- PDF Viewer", "- Support", "- CPD Home", "- HUD Home"

The main content area is titled "Project" and "Search Projects". It contains a "Search Criteria" form with the following fields:
- **Program Year**: A dropdown menu.
- **Program**: A dropdown menu.
- **Project Title**: A text input field.
- **IDIS Project ID**: A text input field.
- **Grantee/PJ Project ID**: A text input field.
- **Status**: A dropdown menu with "Select" as the current option.
At the bottom of the form are "Search" and "Reset" buttons.

- 4) Search Results Page will appear
- 5) Click the **View** link under **Action** column of applicable project

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ
Admin
Reports

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE

[- Logout](#)

Activity

[- Add](#)
[- Search](#)

Project

[- Add](#)
[- Search](#)
[- Copy](#)

Utilities

[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links

[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Project

Search Projects

Search Criteria

Program Year: 2008 <input type="button" value="v"/>	Program: <input type="button" value="v"/>	Project Title: <input type="text"/>
IDIS Project ID: 14 <input type="text"/>	Grantee/PJ Project ID: <input type="text"/>	Status: Select <input type="button" value="v"/>

|

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2008	14		testing	MILWAUKEE, WI	Open	Edit View

Page 17

6) View Project page will appear

[- Logout](#)

Activity

- [- Add](#)
- [- Search](#)

Project

- [- Add](#)
- [- Search](#)
- [- Copy](#)

Utilities

- [- Home](#)
- [- Data Downloads](#)
- [- Print Page](#)
- [- Help](#)

Links

- [- PDF Viewer](#)
- [- Support](#)
- [- CPD Home](#)
- [- HUD Home](#)

View Project

[Return To Projects](#)

Grantee/PJ Name:
MILWAUKEE

Program Year:
2008

IDIS Project ID:
14

Status:
Open

Project Title:
testing

Grantee/PJ Project ID:

Description:

Allow Another Organization to Set up Activities under this Project:

Estimated Amount (Including Program Income)

CDBG	\$500,000.00
HOME	\$0.00
ESG	\$0.00

3.4 Copy Projects

- 1) Click **Projects/Activities** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

CDS

User ID: C01133

User Role: Grantee

Organization: MILWAUKEE

[- Logout](#)

Utilities

- [- Home](#)
- [- Data Downloads](#)
- [- Print Page](#)
- [- Help](#)

Links

- [- PDF Viewer](#)
- [- Support](#)
- [- CPD Home](#)
- [- HUD Home](#)

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ
Admin
Reports

Welcome to the Integrated Disbursement and Information System

IDIS News

No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

2) Next, click the **Copy** link on left side under **Project**

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text "Community Development Systems Integrated Disbursement & Information System (IDIS)". The version number "IDIS version 11.0.1_3381" is visible in the top right corner. Below the header, there is a navigation menu with tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Projects/Activities" tab is currently selected.

On the left side, there is a user information box containing the following details:

- User ID: C01133
- User Role: Grantee
- Organization: MILWAUKEE
- Logout

Below the user information, there are several utility and link boxes:

- Activity**
 - Add
 - Search
- Project**
 - Add
 - Search
 - Copy
- Utilities**
 - Home
 - Data Downloads
 - Print Page
 - Help
- Links**
 - PDF Viewer
 - Support
 - CPD Home
 - HUD Home

The main content area is titled "Project" and contains a "Search Projects" section. This section includes a "Search Criteria" form with the following fields:

- Program Year: [Dropdown menu]
- Program: [Dropdown menu]
- Project Title: [Text input field]
- IDIS Project ID: [Text input field]
- Grantee/PJ Project ID: [Text input field]
- Status: [Dropdown menu with "Select" option]

At the bottom of the search criteria form, there are "Search" and "Reset" buttons.

- 3) The **Copy Project** page will appear
- 4) Select **Program Year** in dropdown menu of the **Copy Project to Program Year** field
- 5) In the **Copy** column of the **Results Page**, place a check by the project(s) you wish to copy
- 6) If user would like to **Copy Project to New Program Year**, click the applicable box and type in year within the **Program Year** section
- 7) Click the **Copy Projects** button

[- Logout](#)

Activity
- [Add](#)
- [Search](#)

Project
- [Add](#)
- [Search](#)
- [Copy](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Copy Project

[Copy Projects](#)

***Indicates Required Field**

Search Criteria

Program Year: 2008 **Program:** **Project Title:**

IDIS Project ID: **Grantee/PJ Project ID:**

(ex: nnnn) (ex: x-nnnn-xxxx)

|

Program Year

***Copy Project to Program Year:** **Copy Project to New Program Year:**

(ex: yyyy) (ex: yyyy)

Results Page 1 of 77

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2008	1		NRSA AREA #1	<input type="checkbox"/>
2008	2		NRSA AREA #2	<input type="checkbox"/>
2008	3		NRSA AREA #3 - PROJECT #3 IS NOT USED IN 2008	<input type="checkbox"/>

8) Project(s) Copied page will appear

[- Logout](#)

Activity

- [- Add](#)
- [- Search](#)

Project

- [- Add](#)
- [- Search](#)
- [- Copy](#)

Utilities

- [- Home](#)
- [- Data Downloads](#)
- [- Print Page](#)
- [- Help](#)

Links

- [- PDF Viewer](#)
- [- Support](#)
- [- CPD Home](#)
- [- HUD Home](#)

Copy Project

• **Project(s) copied.**

Copy Projects

***Indicates Required Field**

Search Criteria

Program Year: <input type="text" value="▼"/>	Program: <input type="text" value="▼"/>	Project Title: <input type="text"/>
IDIS Project ID: <input type="text"/> <small>(ex: nnnn)</small>	Grantee/PJ Project ID: <input type="text"/> <small>(ex: X-nnnn-xxxx)</small>	

|

Program Year

***Copy Project to Program Year:**
Copy Project to New Program Year:

(ex: yyyy)

Results Page 1 of 54

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2009	1		FAIR HOUSING (BOSTON FAIR HOUSING COMMISSION)	<input type="checkbox"/>
----	2		RESERVED	<input type="checkbox"/>

4. Activities

4.1 Adding Activities

- 1) Select **Projects/Activities** Tab at top of screen

The screenshot displays the IDIS web application interface. At the top, it shows 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. Below this is a blue header with 'Community Development Systems' and 'Integrated Disbursement & Information System (IDIS)'. A navigation bar contains tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The 'Projects/Activities' tab is selected. On the left, a sidebar shows user information: 'User ID: C01133', 'User Role: Grantee', 'Organization: MILWAUKEE', and a '- Logout' link. Below this are 'Utilities' (Home, Data Downloads, Print Page, Help) and 'Links' (PDF Viewer, Support, CPD Home, HUD Home). The main content area features a 'Welcome to the Integrated Disbursement and Information System' message. Below this is an 'IDIS News' section with 'No news to display.' To the right, there are two warning messages: one about misuse of federal information and another about session expiration. At the bottom, there is contact information for the U.S. Department of Housing and Urban Development.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
- Logout

Projects/Activities Funding/Drawdown Grant Grantee/PJ Admin Reports

Welcome to the
Integrated Disbursement and Information System

Utilities
- Home
- Data Downloads
- Print Page
- Help

Links
- PDF Viewer
- Support
- CPD Home
- HUD Home

IDIS News
No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

- 2) Click the **Add** link on left side under **Activity**
- 3) Enter required data: **Activity Owner, Activity Name, Program Year, IDIS Project ID/Project Title, Activity Category** and **Environmental Assessment**
- 4) Enter other additional information as needed
- 5) Click **Save**

Activity

- [Add](#)
- [Search](#)

Project

- [Add](#)
- [Search](#)
- [Copy](#)

Utilities

- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links

- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Save | Cancel

***Indicates Required Field**

***Activity Owner:**
MILWAUKEE, WI

***Program Year:**
Select

***IDIS Project ID/Project Title:**
Select

***Activity Name:**

Grantee/PJ Activity ID:

Program	*Activity Category	Ready to Fund	Setup Detail
CDBG	None	No	<input type="button" value="Add CDBG"/>
ESG	None	No	<input type="button" value="Add ESG"/>
HOME	None	No	<input type="button" value="Add HOME"/>
HOPWA	None	No	<input type="button" value="Add HOPWA"/>

***Environmental Assessment:**

Underway

Exempt

Complete

Allow Another Organization to Access this Activity: (tip)

Activity Description:

- 6) **The new activity has been saved** message will appear
- 7) To continue setup of the activity, click the applicable program to add under the **Setup Detail** column.

MILWAUKEE

[Logout](#)

Activity

[Add](#)

[Search](#)

Object

[Add](#)

[Search](#)

[Copy](#)

Utilities

[Home](#)

[Data Downloads](#)

[Print Page](#)

[Help](#)

Links

[DF Viewer](#)

[Support](#)

[PD Home](#)

[HUD Home](#)

Edit Activity

• **The new activity has been saved.**

Save | Cancel

***Indicates Required Field**

Activity Owner:
MILWAUKEE, WI

IDIS Activity ID:
8886

***Program Year:**
2008

***IDIS Project ID/Project Title:**
14/testing (2008)

***Activity Name:**
testing activity

Activity Status:
Open

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

Grantee/PJ Activity ID:

Initial Funding Date:

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG	05 - Public Services (General)	No	No	Add CDBG	Add CDBG Accomp.
ESG	None	No	No	Add ESG	Add ESG Accomp.

4.2 Editing Activities

- 1) Click the **Projects/Activities** Tab at top of screen
- 2) Enter applicable **Search Criteria** for the activity
- 3) Click the **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is visible in the top right corner. Below the header, there are navigation tabs: 'Projects/Activities' (highlighted), 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left side, there is a user information box with the following details: 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT'. Below this, there are links for '- Logout'. Further down, there are sections for 'Activity' (with links for '- Add' and '- Search'), 'Project' (with links for '- Add', '- Search', and '- Copy'), 'Utilities' (with links for '- Home', '- Data Downloads', '- Print Page', and '- Help'), and 'Links' (with links for '- PDF Viewer', '- Support', '- CPD Home', and '- HUD Home'). The main content area is titled 'Activity' and contains a 'Search Activities' section. This section includes a 'Search Criteria' form with the following fields: 'Program:' (a dropdown menu set to 'All'), 'IDIS Project ID:' (a text input field), 'Status:' (a dropdown menu set to 'All'), 'Activity Name:' (a text input field), 'IDIS Activity ID:' (a text input field), 'Program Year:' (a dropdown menu set to 'Select'), 'Grantee/PJ Activity ID:' (a text input field), and 'Activity Owner:' (a dropdown menu set to 'LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY'). At the bottom of the search criteria form, there are 'Search' and 'Reset' buttons.

- 4) Search results will appear
- 5) Choose the applicable activity by clicking **Edit** under the **Action** column on the right side of page

Organization:
LOUISVILLE - JEFFERSON COUNTY METRO GOVT

[- Logout](#)

Activity

[- Add](#)

[- Search](#)

Project

[- Add](#)

[- Search](#)

[- Copy](#)

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Links

[- PDF Viewer](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

Activity

Search Activities

Search Criteria

Program: HOME **IDIS Project ID:** **Status:** All

Activity Name: **IDIS Activity ID:**

Program Year: Select **Grantee/PJ Activity ID:** **Activity Owner:** LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY

|

Results Page 1 of 281

Activity Name	Program Year/ Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Status	Activity Owner	Action
TBRA -VARIOUS CLIENTS JULY'S RENT & LGE	2008/32	23798		Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
GRAHAM, PAULINE	2006/5	23790	HOME REPAIR	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
COOPER, SHAQUILLA	2006/40	23774	DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
MINOR, ALMA	2006/40	23773		Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
HURRIGAN, RENITA	2006/40	23772	DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
CALHOUN, WILBERT	2006/40	23771	NEWBURG-DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View

IDIS OnLine Quick Tips User Guide

- 6) Make the necessary changes to the Activity, including **Activity Status**, **Completion Date**, **Program Year**, **IDIS Project ID/Project Title**, **Grantee/PJ Activity ID**, and/or **Activity Name**
- 7) Next click the **Save** button
- 8) If program edits are needed, click applicable program button under **Setup Detail (Edit HOME** button for example shown below)

Organization:
LOUISVILLE - JEFFERSON COUNTY METRO GOVT

[- Logout](#)

Activity

Edit Activity

|

Activity

[- Add](#)

[- Search](#)

***Indicates Required Field**

Activity Owner:
LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY

Activity Status:
Open

IDIS Activity ID:
23798

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

***Program Year:**
2008

Grantee/PJ Activity ID:

***IDIS Project ID/Project Title:**
32/HOME - HOME TENANT BASED RENTAL ASSISTANCE PROGRAM (2008)

Initial Funding Date:
07/25/2008

***Activity Name:**
TBRA -VARIOUS CLIENTS JULY'S RENT &

Project

[- Add](#)

[- Search](#)

[- Copy](#)

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Links

[- PDF Viewer](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

Activity

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG	<input type="text" value="None"/> <input type="button" value="v"/>	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomplishment"/>
ESG	<input type="text" value="None"/> <input type="button" value="v"/>	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="Add ESG Accomplishment"/>
HOME	Tenant-Based Rental Assistance (TBRA) <input type="button" value="v"/>	No	No	<input type="button" value="Edit HOME"/>	<input type="button" value="Add HOME Accomplishment"/>
HOPWA	<input type="text" value="None"/> <input type="button" value="v"/>	No	No	<input type="button" value="Add HOPWA"/>	<input type="button" value="Add HOPWA Accomplishment"/>

- 9) If program button under the **Setup Detail** column is selected from previous page, the program specific **Setup Detail** page will be displayed (**Edit HOME Setup Detail** is the example shown below)
- 10) Make the necessary edits to the Activity setup detail, including **Performance Objective**, **Will this activity be carried out by a faith-based organization** and/or **Performance Outcome**
- 11) In addition, user can also edit, add or delete required data at bottom of page
- 12) Then click the **Save** button

Organization:
LOUISVILLE - JEFFERSON COUNTY METRO GOVT

[- Logout](#)

Activity
[- Add](#)
[- Search](#)

Project
[- Add](#)
[- Search](#)
[- Copy](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help \(Add\)](#)
[- Help \(Edit\)](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Activity

Edit HOME Setup Detail

Tenant-Based Rental Assistance (TBRA)

|

*** Indicates Required Field**

Grantee/PJ Activity ID: N/A	Activity Name: TBRA -VARIOUS CLIENTS JULY'S RENT & LGE	Program Year/Project ID: 2008/32
IDIS Activity ID: 23798	Activity Owner: LOUISVILLE - JEFFERSON COUNTY METRO GOVT	Project Title: HOME - HOME TENANT BASED RENTAL ASSISTANCE PROGRAM

***Performance Objective:** **Will this activity be carried out by a faith-based organization?**
 Yes No

***Performance Outcome:**

Beneficiary Units Total: 1

Page 1 of 1

Last Name	# of Bdms	Security Deposit	Monthly Rent			Percent. Area Median Income	Household				Tenant Contract			Action
			Tenant Rent	TBRA Subsidy	Total Rent		Hispanic/Latino	Race	Size	Type	Paid To	Newly Assisted	Months	
DANZY	3 bedrooms	\$0	\$0	\$177	\$177	30+ to 50%	No	White	3 persons	Single Parent	Owner	No	24	Edit Delete

4.3 Funding Activities

- 1) Select the **Funding/Drawdown** Tab
- 2) The **Activity Funding** page will appear
- 3) Enter applicable search criteria
- 4) Click the **Search** button

The screenshot shows the IDIS web interface. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "Community Development Systems Integrated Disbursement & Information System (IDIS)". The user is logged in as "User ID: C32177", "User Role: Grantee", and "Organization: BOSTON". There are navigation tabs for "Projects/Activities", "Funding/Drawdown" (which is selected), "Grant", and "Grantee/PJ". The main heading is "Activity Funding" with the instruction "Search for Activities to Fund". A search criteria form contains fields for "Program:" (dropdown menu set to "All"), "IDIS Project ID:" (text input), "Activity Status:" (dropdown menu set to "All"), "Activity Name:" (text input), "IDIS Activity ID:" (text input), "*Activity Owner:" (dropdown menu set to "BOSTON, MA"), "Program Year:" (dropdown menu set to "All"), and "Grantee/PJ Activity ID:" (text input). At the bottom of the form are "Search" and "Reset" buttons. On the left side, there are several menu sections: "Activity Funding" with a "Search" link, "Drawdown" with links for "Create Voucher", "Search Voucher", and "Approve Voucher", "Receipt" with links for "Add", "Search", and "Search Accounts", and "Utilities" with links for "Home", "Data Downloads", "Print Page", and "Help".

- 5) The Search Results page will appear
- 6) Select **Add-Edit** under the Action column

User ID: C32177
User Role: Grantee
Organization:
BOSTON
Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

- Logout

Activity Funding
- Search

Drawdown
- Create Voucher
- Search Voucher
- Approve Voucher

Receipt
- Add
- Search
- Search Accounts

Utilities
- Home
- Data Downloads
- Print Page
- Help

Links
- PDF Viewer
- Support
- CPD Home

Activity Funding

Search for Activities to Fund

Search Criteria

Program: <input type="text" value="All"/>	IDIS Project ID: <input type="text"/>	Activity Status: <input type="text" value="All"/>
Activity Name: <input type="text"/>	IDIS Activity ID: <input type="text" value="14626"/>	* Activity Owner: <input type="text" value="BOSTON, MA"/>
Program Year: <input type="text" value="All"/>	Grantee/PJ Activity ID: <input type="text"/>	

|

Results Page 1 of 1

Activity Name	Program Year/ IDIS Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Activity Status	Activity Owner	Action
BELLA LUNA RESTAURANT	2008/17	14626		Open	BOSTON, MA	Add-Edit

- 7) The Edit Activity Funding page will appear
- 8) Select **Add-Edit-View** under the Action column for the appropriate activity

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

User ID: C32177
User Role: Grantee
Organization: BOSTON
[- Logout](#)

Activity Funding
[- Search](#)

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Receipt
[- Add](#)
[- Search](#)
[- Search Accounts](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Activity Funding

Edit Activity Funding

[Return to Search for Activities to Fund](#)

***Indicates Required Field**

Activity Owner: BOSTON, MA	Program Year/Project: 2008/3
IDIS Activity ID: 14624	Total Funded: \$105,500.00
Activity Name: 26 WOODDALE AVENUE	Total Drawn: \$0.00

Funding Sources

Recipient Name: **Program:** **Fund Type:**

|

Available Funds

Recipient Name	Program	Fund Type	Source Name	Source Type	Available for Funding	Funded Amount	Drawn Amount	Action
BOSTON, MA	HOME	AD	HUD	MC	\$634,803.05	\$100,000.00	\$0.00	Add-Edit View

- 9) The **Add-Edit Funding Line Item** page will appear
- 10) Enter dollar amount in **Funded Amount** field, **Grant Year** field is optional
- 11) Click the **Save** button

Organization:
BOSTON

[- Logout](#)

Activity Funding

Add-Edit Funding Line Item

Activity Funding

[- Search](#)

[Return to Add-Edit Funding](#)

Drawdown

[- Create Voucher](#)

[- Search Voucher](#)

[- Approve Voucher](#)

Activity Owner:
BOSTON, MA

IDIS Activity ID:
14624

Activity Name:
26 WOODDALE AVENUE

Program Year/Project:
2008/3

Total Funded:
\$105,500.00

Total Drawn:
\$0.00

Receipt

[- Add](#)

[- Search](#)

[- Search Accounts](#)

Funding Source

Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount
HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Current Funding for This Source

Grant Year (tip)	Funded Amount	Drawn Amount
2007	\$ 100,000.00	\$0.00

[Add Grant Year](#) | [Save](#) | [Cancel](#)

[Return to Add-Edit Funding](#)

12) Activity funded successfully message will appear

	Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ																						
<p>User ID: C32177 User Role: Grantee Organization: BOSTON</p> <p>- Logout</p> <p>Activity Funding - Search</p> <p>Drawdown - Create Voucher - Search Voucher - Approve Voucher</p> <p>Receipt - Add - Search - Search Accounts</p> <p>Utilities - Home - Data Downloads - Print Page - Help</p> <p>Links - PDF Viewer - Support - CPD Home</p>	<p>Activity Funding</p> <p>Add-Edit Funding Line Item</p> <ul style="list-style-type: none"> • Activity funded successfully. <p style="text-align: center;">Return to Add-Edit Funding</p> <hr/> <p>Activity Owner: BOSTON, MA</p> <p>IDIS Activity ID: 14624</p> <p>Activity Name: 26 WOODDALE AVENUE</p> <p>Program Year/Project: 2008/3</p> <p>Total Funded: \$105,500.00</p> <p>Total Drawn: \$0.00</p> <hr/> <p>Funding Source</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Program</th> <th>Fund Type</th> <th>Source Name</th> <th>Source Type</th> <th>Recipient Name</th> <th>Available for Funding</th> <th>Drawn Amount</th> <th>Funded Amount</th> </tr> </thead> <tbody> <tr> <td>HOME</td> <td>AD</td> <td>HUD</td> <td>MC</td> <td>BOSTON, MA</td> <td style="text-align: right;">\$634,803.05</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$100,000.00</td> </tr> </tbody> </table> <hr/> <p>Current Funding for This Source</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Grant Year (tip)</th> <th>Funded Amount</th> <th>Drawn Amount</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">2007</td> <td style="text-align: right;">\$ 100,000.00</td> <td style="text-align: right;">\$0.00</td> </tr> </tbody> </table>				Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount	HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00	Grant Year (tip)	Funded Amount	Drawn Amount	2007	\$ 100,000.00	\$0.00
Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount																			
HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00																			
Grant Year (tip)	Funded Amount	Drawn Amount																								
2007	\$ 100,000.00	\$0.00																								

5. Drawdowns/Vouchers

5.1 Creating Drawdowns/Vouchers

- 1) Select **Funding/Drawdown** Tab
- 2) Click **Create Voucher** link on the left side under **Drawdown**

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is visible in the top right corner. The main navigation bar includes tabs for 'Projects/Activities', 'Funding/Drawdown' (which is selected), 'Grant', and 'Grantee/PJ'. On the left side, there is a user profile section for 'User ID: C32177', 'User Role: Grantee', and 'Organization: BOSTON', with a '- Logout' link. Below this are several menu sections: 'Activity Funding' with a '- Search' link; 'Drawdown' with links for '- Create Voucher', '- Search Voucher', and '- Approve Voucher'; 'Receipt' with links for '- Add', '- Search', and '- Search Accounts'; and 'Utilities' with links for '- Home', '- Data Downloads', '- Print Page', and '- Help'. The main content area is titled 'Activity Funding' and contains the text 'Search for Activities to Fund'. Below this is a search criteria form with the following fields: 'Program:' (dropdown menu set to 'All'), 'Activity Name:' (text input), 'Program Year:' (dropdown menu set to 'All'), 'IDIS Project ID:' (text input), 'IDIS Activity ID:' (text input), 'Grantee/PJ Activity ID:' (text input), 'Activity Status:' (dropdown menu set to 'All'), and '* Activity Owner:' (dropdown menu set to 'BOSTON, MA'). At the bottom of the search criteria form are 'Search' and 'Reset' buttons.

- 3) **Create Voucher-Select Activities** page will appear
- 4) **Voucher Created For** and **Activity Owner** fields will be auto-populated
- 5) Enter **IDIS Activity ID** number(s)
- 6) Click the **Continue** button

User ID: C32177 User Role: Grantee Organization: BOSTON - Logout	Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ																																																																								
Activity Funding - Search	Drawdown Create Voucher - Page 1 of 4 (Select Activities)																																																																											
Drawdown - Create Voucher - Search Voucher - Approve Voucher	<input type="button" value="Continue"/>																																																																											
Receipt - Add - Search - Search Accounts	<p>* Indicates Required Field</p> <p>* Voucher Created For: (tip) <input type="text" value="BOSTON, MA"/> Requested LOCCS Submission Date: (tip) <input type="text" value="Select Date"/> <small>(ex: mm/dd/yyyy)</small></p> <p>* Activity Owner: (tip) <input type="text" value="BOSTON, MA"/></p> <p>* IDIS Activity ID</p> <table border="1"><tr><td>14629</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> <p><input type="button" value="Search for Activities"/> <input type="button" value="Reset"/></p>				14629																																																																							
14629																																																																												
Utilities - Home - Data Downloads - Print Page - Help																																																																												
Links - PDF Viewer - Support - CPD Home - HUD Home																																																																												

- 7) **Create Voucher – Drawdown Amounts** page will appear
- 8) Enter **Drawdown Amount**
- 9) Click **Confirm Voucher** button

User Role: Grantee
Organization:
BOSTON

[- Logout](#)

Drawdown

Create Voucher - Page 2 of 4 (Drawdown Amounts)

Activity Funding
[- Search](#)

|
 |

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Activity 1 of 1

IDIS Activity ID:
14629

Activity Name:
22 FERNBORO STREET

Voucher Created For:
BOSTON, MA

Grantee/PJ Activity ID:

Activity Owner:
BOSTON, MA

Available Drawdown Amounts for This Activity

Recipient Name	Program	Fund Type	Source Name	Source Type	Prior Year	Funded Amount	Available to Draw	Drawdown Amount
BOSTON, MA	CDBG	EN	HUD	MC	N	\$27,200.00	\$5,000.00	\$ <input type="text" value="0"/>

|

Progress by Activity ID

Entered:
Not Entered: 14629 (#1)
Invalid:

|
 |

10) **Create Voucher – Confirmation** page will appear

11) Click the **Generate Voucher** button to complete voucher creation

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON

[- Logout](#)

Drawdown

Create Voucher - Page 3 of 4 (Confirmation)

- Click "Generate Voucher" to complete voucher creation

|

Voucher Created For:
BOSTON, MA

Requested LOCCS Submission Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

Activity Owner:
BOSTON, MA

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$1,000.00
Total										\$1,000.00

|

12) **Voucher created successfully** message will appear

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON

[- Logout](#)

Drawdown

Create Voucher - Page 4 of 4 (View)

- Voucher created successfully

Voucher Created For:
BOSTON, MA

IDIS Voucher #:
5000208

Activity Owner:
BOSTON, MA

Created By:
C32177

Requested LOCCS Submission Date:

Creation Date:
06/17/2009

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$1,000.00
Total										\$1,000.00

5.2 Approving Drawdowns/Vouchers

- 1) Select the **Funding/Drawdown** Tab
- 2) Click **Approve Voucher** link on the left side under **Drawdown**

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The user information on the left includes 'User ID: C32177', 'User Role: Grantee', and 'Organization: BOSTON'. The main navigation tabs are 'Projects/Activities', 'Funding/Drawdown' (which is highlighted), 'Grant', and 'Grantee/PJ'. The 'Activity Funding' section is active, showing a search criteria form with fields for 'Program', 'IDIS Project ID', 'Activity Status', 'Activity Name', 'IDIS Activity ID', '* Activity Owner', and 'Program Year'. The 'Activity Owner' is set to 'BOSTON, MA'. There are 'Search' and 'Reset' buttons at the bottom of the search criteria form. On the left sidebar, under the 'Drawdown' section, the 'Approve Voucher' link is visible.

- 3) The **Search Vouchers** page will appear
- 4) Enter the IDIS Activity Number in the **IDIS Activity ID** field, and select the applicable **Activity Owner**
- 5) User may also search vouchers by **IDIS Voucher #**, **Earliest Creation Date** and/or **Line Item Status**
- 6) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON
[- Logout](#)

Projects/Activities | **Funding/Drawdown** | Grant | Grantee/PJ

Drawdown
Search Vouchers

Search Criteria
*Indicates Required Field

IDIS Voucher #: IDIS Activity ID: *Activity Owner: BOSTON, MA

Earliest Creation Date: [Select Date](#) Line Item Status: Select

(ex: mm/dd/yyyy)

|

Activity Funding
[- Search](#)

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Receipt
[- Add](#)
[- Search](#)
[- Search Accounts](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

- 7) The search results will appear
- 8) Click **Maintain-Approve** link under the **Action** column

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_3381

Community Development Systems
 Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization:
 BOSTON

[Logout](#)

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

Drawdown

Search Vouchers For Approval

Search Criteria

IDIS Voucher #:	IDIS Activity ID:	Activity Owner:
<input type="text"/>	<input type="text" value="14629"/>	BOSTON, MA
Earliest Creation Date:	Line Item Status:	
<input type="text"/> Select Date	Open	
<small>(ex: mm/dd/yyyy)</small>		

|

Results Page 1 of 1 (1 voucher line items found)

IDIS Voucher #	Line Item #	Creation Date	IDIS Actv ID	Activity Name	Line Item Status	Drawdown Amount	Action
5000190	1	06/10/2009	14629	22 FERNBORO STREET	Open	\$12,200.00	Maintain-Approve View

Activity Funding

[Search](#)

Drawdown

[Create Voucher](#)

[Search Voucher](#)

[Approve Voucher](#)

Receipt

[Add](#)

[Search](#)

[Search Accounts](#)

Utilities

[Home](#)

[Data Downloads](#)

[Print Page](#)

[Help](#)

- 9) The **Maintain and Approve Voucher** page will appear
- 10) Click the **Approve** link under the **Action** column or click **Approve All Line Items** button to approve multiple line items, if applicable
- 11) The user may also **Cancel, Revise, and/or View** the voucher from the **Voucher Details** box if not ready for approval

DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems **CDS**

Integrated Disbursement & Information System (IDIS)

ID: C01133 **Projects/Activities** **Funding/Drawdown** Grant Grantee/PJ Admin Reports

Role: **Drawdown**

Organization: Maintain and Approve Voucher

Return to Search Vouchers

Voucher Created For: BOSTON, MA **IDIS Voucher #:** 5000190

Activity Owner: BOSTON, MA **Created By:** C32177

Creation Date: 06/10/2009

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date	Action
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Open	06/10/2009	Approve Cancel Revise View

Approve All Line Items

IDIS OnLine Quick Tips User Guide

- 12) The **Confirm Voucher Line Item Approval** page will appear
- 13) Click **Approve This Line Item** button
- 14) The user can also click the **Return to Maintain and Approve Voucher** button if approval is not ready

- [Logout](#)
Confirm Voucher Line Item Approval

Activity Funding

- [Search](#)

Drawdown

- [Create Voucher](#)
- [Search Voucher](#)
- [Approve Voucher](#)

Receipt

- [Add](#)
- [Search](#)
- [Search Accounts](#)

Utilities

- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links

- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Voucher Created For: BOSTON, MA	IDIS Voucher # / Line Item Grant #: #: 5000190/1	Transaction Type: Payment
Activity Owner: BOSTON, MA	Created By: C32177	Approved By: Pay To: BOSTON, MA
	Creation Date: 06/10/2009	Approval Date:

IDIS Information

IDIS Status: Voucher created but not yet approved in IDIS

Batch #:
Batch Date:
LOCCS Control #:
LOCCS Status: Blank

Voucher Update
Voucher Updated By: C32177
Date Updated: 06/10/2009
Special Remarks:

LOCCS Confirmation Information

Confirm Batch #:
Confirm Batch Date:
Confirmation Code:
Pay Method:
Payment Date:
Schedule #:
Reschedule:
Effective Date:

Line Item

IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date
14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Open	06/10/2009 Select Date

15) Voucher item approved successfully message will appear

Grantee Organization:
BOSTON
[- Logout](#)

Activity Funding
[- Search](#)

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Receipt
[- Add](#)
[- Search](#)
[- Search Accounts](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Drawdown

Maintain and Approve Voucher

- Voucher item approved successfully

[Return to Search Vouchers](#)

Voucher Created For:
BOSTON, MA

Activity Owner:
BOSTON, MA

IDIS Voucher #:
5000190

Created By:
C32177

Creation Date:
06/10/2009

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date	Acti
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Approved	06/17/2009	Revoke Vie

[Approve All Line Items](#)

[Return to Search Vouchers](#)

6. Receipts

6.1 Add Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1.3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

Projects/Activities **Funding/Drawdown** Grant Grantee/PJ Admin Reports

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
[- Logout](#)

Activity Funding
[- Search](#)

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Receipt
[- Add](#)
[- Search](#)
[- Search Accounts](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Activity Funding
Search for Activities to Fund

Search Criteria

Program: All **IDIS Project ID:** **Activity Status:** All

Activity Name: **IDIS Activity ID:** ***Activity Owner:** MILWAUKEE, WI

Program Year: All **Grantee/PJ Activity ID:**

|

- 2) Click the **Add** link on left side under **Receipt**
- 3) **Add Receipt** page will appear
- 4) Enter required data, including **Program, Program Year, Source Type, Fund Type** and **Amount**
- 5) Enter applicable information as needed, including **Receipt Type, IDIS Activity ID, Matrix Code, Estimated Amount, Grantee Receipt #**, and/or **Comments**
- 6) Click the **Save** button

Organization: MILWAUKEE - Logout	Receipt Add Receipt	
Activity Funding - Search	<input type="button" value="Save"/> <input type="button" value="Reset"/>	
Drawdown - Create Voucher - Search Voucher - Approve Voucher	*Indicates Required Field Receipt Created For: MILWAUKEE Receipt Status: Original	
Receipt - Add - Search - Search Accounts	Receipt *Program: <input type="text" value="Select Program"/> <input type="button" value="v"/> *Program Year: <input type="text"/> *Source Type: <input type="text" value="Select Source"/> <input type="button" value="v"/> *Fund Type: <input type="text" value="Select"/> <input type="button" value="v"/> *Amount: \$ <input type="text" value="0.00"/>	Receipt Type: <input type="text" value="Select Type"/> <input type="button" value="v"/> IDIS Activity ID: <input type="text"/> Matrix Code: <input type="text" value="Select Code"/> <input type="button" value="v"/> Estimated Amount: \$ <input type="text" value="0.00"/> Grantee Receipt #: <input type="text"/>
Utilities - Home - Data Downloads - Print Page - Help	Comments: <input type="text"/>	
Links - PDF Viewer - Support - CPD Home - HUD Home		

7) Message will appear stating receipt is posted and receipt number

- Logout	Add Receipt
Activity Funding - Search	<ul style="list-style-type: none">PROGRAM INCOME Receipt posted. Please note Receipt # 5000045 and Grant # M-08-MC-55-0204.
Drawdown - Create Voucher - Search Voucher - Approve Voucher	<input type="button" value="Save"/> <input type="button" value="Reset"/>
Receipt - Add - Search - Search Accounts	*Indicates Required Field Receipt Created For: MILWAUKEE Receipt Status: Original
Utilities - Home - Data Downloads - Print Page - Help	Receipt *Program: <input type="text" value="Select Program"/> Receipt Type: <input type="text" value="Select Type"/> *Program Year: <input type="text"/> *Source Type: <input type="text" value="Select Source"/> IDIS Activity ID: <input type="text"/> *Fund Type: <input type="text" value="Select"/> Matrix Code: <input type="text" value="Select Code"/> *Amount: <input type="text" value="\$ 0.00"/> Estimated Amount: <input type="text" value="\$ 0.00"/> Grantee Receipt #: <input type="text"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	Comments: <input type="text"/>

6.2 Search /Edit Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

The screenshot shows the IDIS web application interface. At the top, it displays 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The user information on the left includes 'User ID: C01133', 'User Role: Grantee', and 'Organization: MILWAUKEE'. The navigation tabs at the top are 'Projects/Activities', 'Funding/Drawdown' (selected), 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The main content area is titled 'Activity Funding' and contains a search form with the following fields: 'Program:' (dropdown menu set to 'All'), 'Activity Name:' (text input), 'Program Year:' (dropdown menu set to 'All'), 'IDIS Project ID:' (text input), 'IDIS Activity ID:' (text input), 'Grantee/PJ Activity ID:' (text input), 'Activity Status:' (dropdown menu set to 'All'), and '*Activity Owner:' (dropdown menu set to 'MILWAUKEE, WI'). There are 'Search' and 'Reset' buttons at the bottom of the search form. On the left side, there are several menu items: 'Activity Funding - Search', 'Drawdown - Create Voucher, Search Voucher, Approve Voucher', 'Receipt - Add, Search, Search Accounts', and 'Utilities - Home, Data Downloads, Print Page, Help'.

- 2) Click the **Search** link on left side under **Receipt**
- 3) **Search Receipts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program, Program Year, Fund Type, Receipt Number, Amount, Date Created, Receipt Status, and/or Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text "Community Development Systems Integrated Disbursement & Information System (IDIS)". The user information on the left includes "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE". The main navigation bar has tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Receipt" section is active, showing a "Search Receipts" form. The form includes fields for "Program" (All), "Program Year", "Fund Type" (All), "Receipt Number", "Amount", "Date Created" (with a "Select Date" link and example "mm/dd/yyyy"), "Receipt Status" (All), and "Receipt Created For". There are "Search" and "Reset" buttons at the bottom of the form. The left sidebar contains links for "Activity Funding", "Drawdown", "Receipt", and "Utilities".

- 6) Search results page will appear
- 7) Click **Edit** under **Action** column to make any changes to the Receipt information

Organization: LWAUKEE

[Logout](#)

Activity Funding
[Search](#)

Download
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Receipt

Search Receipts

Search Criteria

Program: HOME ▾	Program Year: <input type="text"/>	Fund Type: All ▾
Receipt Number: <input type="text"/>	Amount: <input type="text"/>	Date Created: <input type="text"/> Select Date <small>(ex: mm/dd/yyyy)</small>
Receipt Status: All ▾	Receipt Created For: <input type="text"/>	

|

Results Page 1 of 13

Receipt Number	Program	Program Year	Fund Type	Receipt Created For	Amount	Date Created	Receipt Status	Action
5000045	HOME	2008	PI	MILWAUKEE	\$4,000.00	06/10/2009	Original	Edit View
243462	HOME	2008	PI	MILWAUKEE	\$4,998.00	07/28/2008	Original	Edit View
242158	HOME	2008	PI	MILWAUKEE	\$44,250.98	07/07/2008	Original	Edit View
241865	HOME	2008	PI	MILWAUKEE	\$49,458.90	06/30/2008	Original	Edit View
240706	HOME	2008	PI	MILWAUKEE	\$2,261.00	06/16/2008	Original	Edit View
240291	HOME	2008	PI	MILWAUKEE	\$46,385.54	06/10/2008	Original	Edit View
237602	HOME	2008	PI	MILWAUKEE	\$1,650.00	04/28/2008	Original	Edit View
236644	HOME	2008	PI	MILWAUKEE	\$80,764.20	04/14/2008	Original	Edit View

- 8) **Edit Receipt** page will appear
- 9) Enter changes as needed
- 10) Click the **Save** button

Organization: MILWAUKEE - Logout	Receipt Edit Receipt
Activity Funding - Search	<input type="button" value="Save"/> <input type="button" value="Return to Search Receipts"/>
Drawdown - Create Voucher - Search Voucher - Approve Voucher	*Indicates Required Field
Receipt - Add - Search - Search Accounts	Receipt Created For: MILWAUKEE Receipt Status: Modified <input type="button" value="v"/> Receipt Number: 5000045 Associated Grant #: M-08-MC-55-0204
Utilities - Home - Data Downloads - Print Page - Help	Receipt Program: HOME Receipt Type:
Links - PDF Viewer - Support - CPD Home - HUD Home	Program Year: 2008 IDIS Activity ID: <input type="text"/> Source Type: MC Matrix Code: Select Code <input type="button" value="v"/> Fund Type: PI Grantee Receipt Number: <input type="text"/> * Amount: \$ <input type="text" value="4000.00"/>
	Comments: <input type="text"/>

6.3 View Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

The screenshot shows the IDIS web application interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "Community Development Systems Integrated Disbursement & Information System (IDIS)". The user information on the left includes "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE". The navigation tabs at the top are "Projects/Activities", "Funding/Drawdown" (selected), "Grant", "Grantee/PJ", "Admin", and "Reports". The main content area is titled "Activity Funding" and contains a search form for activities to fund. The search criteria include:

- Program: All (dropdown)
- IDIS Project ID: [text input]
- Activity Status: All (dropdown)
- Activity Name: [text input]
- IDIS Activity ID: [text input]
- *Activity Owner: MILWAUKEE, WI (dropdown)
- Program Year: All (dropdown)
- Grantee/PJ Activity ID: [text input]

At the bottom of the search criteria section, there are "Search" and "Reset" buttons.

- 2) Click the **Search** link on left side under **Receipt**
- 3) **Search Receipts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program, Program Year, Fund Type, Receipt Number, Amount, Date Created, Receipt Status, and/or Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_3381. The main header is "Community Development Systems Integrated Disbursement & Information System (IDIS)". Below the header, there are navigation tabs: "Projects/Activities", "Funding/Drawdown" (which is highlighted), "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left side, there is a user information box with the following details: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "Logout" link. Below this are several menu sections: "Activity Funding" with a "Search" link, "Drawdown" with links for "Create Voucher", "Search Voucher", and "Approve Voucher", "Receipt" with links for "Add", "Search", and "Search Accounts", and "Utilities" with links for "Home", "Data Downloads", "Print Page", and "Help".

The main content area is titled "Receipt" and "Search Receipts". It contains a "Search Criteria" form with the following fields: "Program:" (dropdown menu set to "All"), "Program Year:" (text input), "Fund Type:" (dropdown menu set to "All"), "Receipt Number:" (text input), "Amount:" (text input), "Date Created:" (text input with a "Select Date" link and a note "(ex: mm/dd/yyyy)"), "Receipt Status:" (dropdown menu set to "All"), and "Receipt Created For:" (text input). At the bottom of the form are "Search" and "Reset" buttons.

- 6) Search Results Page will appear
- 7) Click **View** under the **Action** column for a summary of Receipt information

Organization: MILWAUKEE
[Logout](#)

Activity Funding
[Search](#)

Download
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Receipt

Search Receipts

Search Criteria

Program: HOME ▾	Program Year: <input type="text"/>	Fund Type: All ▾
Receipt Number: <input type="text"/>	Amount: <input type="text"/>	Date Created: <input type="text"/> Select Date <small>(ex: mm/dd/yyyy)</small>
Receipt Status: All ▾	Receipt Created For: <input type="text"/>	

|

Results Page 1 of 13

Receipt Number	Program	Program Year	Fund Type	Receipt Created For	Amount	Date Created	Receipt Status	Action
5000045	HOME	2008	PI	MILWAUKEE	\$4,000.00	06/10/2009	Original	Edit View
243462	HOME	2008	PI	MILWAUKEE	\$4,998.00	07/28/2008	Original	Edit View
242158	HOME	2008	PI	MILWAUKEE	\$44,250.98	07/07/2008	Original	Edit View
241865	HOME	2008	PI	MILWAUKEE	\$49,458.90	06/30/2008	Original	Edit View
240706	HOME	2008	PI	MILWAUKEE	\$2,261.00	06/16/2008	Original	Edit View
240291	HOME	2008	PI	MILWAUKEE	\$46,385.54	06/10/2008	Original	Edit View
237602	HOME	2008	PI	MILWAUKEE	\$1,650.00	04/28/2008	Original	Edit View
236644	HOME	2008	PI	MILWAUKEE	\$80,764.20	04/14/2008	Original	Edit View

8) View Receipt page will appear

Organization: MILWAUKEE - Logout	Receipt View Receipt
Activity Funding - Search	Return to Search Receipts
Drawdown - Create Voucher - Search Voucher - Approve Voucher	Receipt Created For: MILWAUKEE Receipt Number: 5000045 Receipt Status: Original Associated Grant #: M-08-MC-55-0204
Receipt - Add - Search - Search Accounts	Receipt Program: HOME Program Year: 2008 Source Type: MC Fund Type: PI Amount: \$4,000.00 Receipt Type: IDIS Activity ID: Matrix Code: Grantee Receipt #:
Utilities - Home - Data Downloads - Print Page - Help	Comments: <input type="text"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	

6.4 View Receipt Accounts

- 1) Click the **Funding/Drawdown** tab at top of screen

The screenshot displays the IDIS web application interface. At the top, it shows 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. Below this is a blue header for 'Community Development Systems Integrated Disbursement & Information System (IDIS)' with the 'CDS' logo. A navigation bar contains tabs for 'Projects/Activities', 'Funding/Drawdown' (which is highlighted), 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left, a sidebar shows user information: 'User ID: C01133', 'User Role: Grantee', and 'Organization: MILWAUKEE', along with a 'Logout' link. Below this are menu sections for 'Activity Funding' (with a 'Search' link), 'Drawdown' (with links for 'Create Voucher', 'Search Voucher', and 'Approve Voucher'), 'Receipt' (with links for 'Add', 'Search', and 'Search Accounts'), and 'Utilities' (with links for 'Home', 'Data Downloads', 'Print Page', and 'Help'). The main content area is titled 'Activity Funding' and contains the text 'Search for Activities to Fund'. A search criteria form is present with the following fields: 'Program:' (dropdown menu set to 'All'), 'IDIS Project ID:' (text input), 'Activity Status:' (dropdown menu set to 'All'), 'Activity Name:' (text input), 'IDIS Activity ID:' (text input), '*Activity Owner:' (dropdown menu set to 'MILWAUKEE, WI'), and 'Program Year:' (dropdown menu set to 'All'). Below these fields are 'Search' and 'Reset' buttons.

- 2) Click the **Search Accounts** link on left side under **Receipt**
- 3) **View Receipt Accounts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program**, **Program Year**, **Fund Type**, and/or **Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the version number 11.0.1_3381. The main header is 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. Below the header, there are navigation tabs: 'Projects/Activities', 'Funding/Drawdown' (highlighted), 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left side, there is a user information box with 'User ID: C01133', 'User Role: Grantee', and 'Organization: MILWAUKEE'. Below this are links for 'Logout', 'Activity Funding', 'Drawdown', 'Receipt', and 'Utilities'. The main content area is titled 'Receipt' and contains a 'View Receipt Accounts' section. This section includes a 'Search Criteria' form with fields for 'Program:' (a dropdown menu set to 'All'), 'Program Year:' (a text input field), and 'Fund Type:' (a dropdown menu set to 'All'). Below these fields is a 'Receipt Created For:' text input field. At the bottom of the search form are 'Search' and 'Reset' buttons.

6) Search Results Page will appear

Organization: MILWAUKEE

[Logout](#)

Activity Funding

[Search](#)

Drawdown

[Create Voucher](#)

[Search Voucher](#)

[Approve Voucher](#)

Receipt

[Add](#)

[Search](#)

[Search Accounts](#)

Utilities

[Home](#)

[Data Downloads](#)

[Print Page](#)

[Help](#)

Links

[PDF Viewer](#)

[Support](#)

[CPD Home](#)

[HUD Home](#)

Receipt

View Receipt Accounts

Search Criteria

Program: **Program Year:** **Fund Type:**

Receipt Created For:

|

Results Page 1 of 3

Program	Source Type	Program Year	Fund Type	Estimated Amount	Receipt Created For	Amount	Drawdown Amount
CDBG	MC	2008	PI	\$500,000.00	MILWAUKEE	\$324,519.41	\$266,548.23
CDBG	MC	2008	RL	\$10,000.00	MILWAUKEE	\$61,483.19	\$55,179.77
CDBG	MC	2007	PI	\$1,000,000.00	MILWAUKEE	\$562,116.37	\$541,344.82
CDBG	MC	2007	RL	\$200,000.00	MILWAUKEE	\$62,161.90	\$61,011.90
CDBG	MC	2006	PI	\$1,150,000.00	MILWAUKEE	\$977,075.76	\$977,075.76
CDBG	MC	2006	RL	\$250,000.00	MILWAUKEE	\$183,494.50	\$181,994.50
CDBG	MC	2005	PI	\$1,500,000.00	MILWAUKEE	\$1,139,659.96	\$1,138,659.96
CDBG	MC	2005	RL	\$500,000.00	MILWAUKEE	\$251,627.98	\$251,627.98
CDBG	MC	2004	PI	\$1,200,000.00	MILWAUKEE	\$1,318,763.20	\$1,318,763.20
CDBG	MC	2004	RL	\$100,000.00	MILWAUKEE	\$216,463.83	\$216,463.83

7. Subfunds

7.1 Add Subfunds

- 1) Click **Grant** tab at top of screen
- 2) Click **Add** link on left side under **Subfund**
- 3) Enter applicable **Search Criteria**, including **Program, Fund Type, Grant #** and/or **Grant Year**
- 4) Click the **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The user's information is shown on the left: User ID: C01133, User Role: Grantee, Organization: MILWAUKEE, and a Logout link. The main navigation tabs are Projects/Activities, Funding/Drawdown, Grant (selected), Grantee/PJ, Admin, and Reports. The 'Subfund' section is active, showing 'Add Subfunds' and a search criteria form. The search criteria form includes dropdown menus for Program (set to 'All'), Fund Type (set to 'Select'), and Grant Year (set to 'Select'), along with a text input field for Grant #. Search and Reset buttons are located below the form. The message 'There are no results to display.' is shown below the search form. On the left sidebar, there are sections for Grant, Subfund, Subgrant, Utilities, and Links, each with an Add and Search link.

- 5) Search results will appear
- 6) Click the **Add** link in the **Action** column

Organization:
MILWAUKEE

[- Logout](#)

Subfund

Add Subfunds

Grant
[- Search](#)

Subfund
[- Add](#)
[- Search](#)

Subgrant
[- Add](#)
[- Search](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Search Criteria

Program: Fund Type: (tip) Grant #: (tip)

Grant Year: (tip)

|

Results Page 1 of 2

Grantee/PJ Name	Program	Grant Year	Grant #	Fund Type	Authorized Amount	Action
MILWAUKEE	HOME	2008	M-08-MC-55-0204	CR	\$1,860,000.00	Add
MILWAUKEE	HOME	2007	M-07-MC-55-0204	CR	\$1,832,251.08	Add
MILWAUKEE	HOME	2006	M-06-MC-55-0204	CR	\$1,528,183.81	Add
MILWAUKEE	HOME	2005	M-05-MC-55-0204	CR	\$1,080,000.00	Add
MILWAUKEE	HOME	2004	M-04-MC-55-0204	CR	\$1,080,279.79	Add
MILWAUKEE	HOME	2003	M-03-MC-55-0204	CR	\$1,066,369.80	Add
MILWAUKEE	HOME	2002	M-02-MC-55-0204	CR	\$1,410,300.00	Add
MILWAUKEE	HOME	2001	M-01-MC-55-0204	CR	\$1,746,557.00	Add
MILWAUKEE	HOME	2000	M-00-MC-55-0204	CR	\$1,272,600.00	Add
MILWAUKEE	HOME	1999	M-99-MC-55-0204	CR	\$1,166,871.00	Add

1 2 [Next 10 Results](#)

- 7) **Add Subfund** page will appear
- 8) Enter new amount in the **Authorized Amount for this Subfund** box
- 9) Click the **Save** button

Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
[Logout](#)

Subfund
Add Subfund

[Save](#) | [Return to Search Subfunds](#)

Grant
[Search](#)

Subfund
[Add](#)
[Search](#)

Subgrant
[Add](#)
[Search](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

***Indicates Required Field**

Grantee/PJ Name: MILWAUKEE , WI
Grant #: (tip) M-08-MC-55-0204
Program: (tip) HOME
Grant Status: (tip) Active
Grant Year: (tip) 2008
Grant Blocked: (tip) No

***Fund Type:** (tip)
Select Option

Source Fund: CR

Subfund Amount	
Minimum Authorized Amount Required	
Maximum Authorized Amount Allowed	
Available to Subfund	
Authorized Amount for this Subfund (tip)	\$ <input type="text"/>

[Save](#) | [Return to Search Subfunds](#)

8. Subgrants

8.1 Add Subgrants

- 1) Click the **Grant** tab at top of screen
- 2) Click **Add** link on left side under **Subgrant**
- 3) Enter required data, including **Program, Grant Year, Grant #, Fund Type, Subgrant to Organization, New Subgrant Amount**, and **Banking**
- 4) Click **Select Organization** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Projects/Activities Funding/Drawdown **Grant** Grantee/PJ Admin Reports

User ID: C01133
User Role: Grantee
Organization: SOUTH DAKOTA
[Logout](#)

Subgrant
Add Subgrant

Grant
[Search](#)

Subfund
[Add](#)
[Search](#)

Subgrant
[Add](#)
[Search](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

***Indicates Required Field**

*Program (tip)	*Grant Year (tip)	*Grant # (tip)	*Fund Type (tip)
Select ▾	Select ▾	Select ▾	Select ▾

*Subgrant to Organization	Maximum Subgrant Amount	*New Subgrant Amount	*Banking
Select Organization		\$ <input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Check Balance](#) | [Save](#) | [Reset](#)

Show Availability

Program: (tip)	Grant Year: (tip)	Grant #: (tip)	Fund Type: (tip)	Show
Select ▾	Select ▾	Select ▾	Select ▾	

- 5) **Select Organization** page will appear
- 6) Enter applicable **Search Criteria**, including **Organization Name, City, DUNS #, and/or EIN/TIN #**
- 7) Click the **Search** button

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text "Community Development Systems Integrated Disbursement & Information System (IDIS)". The version number "IDIS version 11.0.1_3984" is visible in the top right corner. Below the header, there is a navigation menu with tabs for "Projects/Activities", "Funding/Drawdown", "Grant" (which is highlighted), "Grantee/PJ", "Admin", and "Reports".

The main content area is titled "Subgrant" and contains a "Select Organization" section. This section includes a "Cancel" button and a "Search Criteria" form. The search criteria form has four input fields: "Organization Name:", "City:", "DUNS #:", and "EIN/TIN #:". Below these fields are "Search" and "Reset" buttons. The "DUNS #" and "EIN/TIN #" fields have example formats: "(ex: 00-000-0000)" and "(ex: 00-000000)" respectively.

On the left side of the interface, there is a sidebar with several sections:

- User ID:** C01133
User Role: Grantee
Organization: MILWAUKEE
[Logout](#)
- Grant**
[Search](#)
- Subfund**
[Add](#)
[Search](#)
- Subgrant**
[Add](#)
[Search](#)
- Utilities**
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)
- Links**
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

At the bottom right of the main content area, there is a blue bar with a home icon.

- 8) Choose correct **Organization Name** by clicking the applicable radio button
- 9) Click the **Select** button

Search | Reset

Subgrant to:

Results Page 1 of 166

Organization Name	City	LOCCS Banking Access	DUNS #	EIN/TIN #
<input type="radio"/> 30TH STREET ICC	MILWAUKEE COUNTY CONSORTIUM	No		
<input type="radio"/> 30TH STREET INDUSTRIAL CORRIDOR COPR	MILWAUKEE	No		
<input type="radio"/> 30TH STREET INDUSTRIAL CORRIDOR CORP	MILWAUKEE COUNTY CONSORTIUM	No		
<input type="radio"/> ABBOTSFORD	ABBOTSFORD	No		
<input checked="" type="radio"/> ACAP, INC	WAUKESHA COUNTY CONSORTIUM	No		
<input type="radio"/> ACCESS TO INDEPENDENCE 22 NORTH SECOND STREET	MADISON	No		39-1240200
<input type="radio"/> ACTS	MILWAUKEE	No		
<input type="radio"/> ADAMS COUNTY	ADAMS COUNTY	No		
<input type="radio"/> ADOPT-A-NEIGHBORHOOD, INC	ADOPT-A-NEIGHBORHOOD, INC	No		
<input type="radio"/> ADVOCAP	NEENAH	No		

1 2 3 4 5 6 7 8 9 10 Next 10 Results

Select | Cancel | Add Organization

- 10) Enter **New Subgrant Amount** and **Banking** option
- 11) Click the **Save** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
Logout

Projects/Activities | Funding/Drawdown | **Grant** | Grantee/PJ | Admin | Reports

Subgrant
Add Subgrant

*Indicates Required Field

*Program (tip)	*Grant Year (tip)	*Grant # (tip)	*Fund Type (tip)
HOME	2008	M08MC550204	CR

*Subgrant to Organization	Maximum Subgrant Amount	*New Subgrant Amount	*Banking
ADOPT-A-NEIGHBORHOOD, INC ADOPT-A-NEIGHBORHOOD, INC, WI Change Organization	\$0.00	\$	<input type="radio"/> Yes <input checked="" type="radio"/> No

Check Balance | Save | Reset

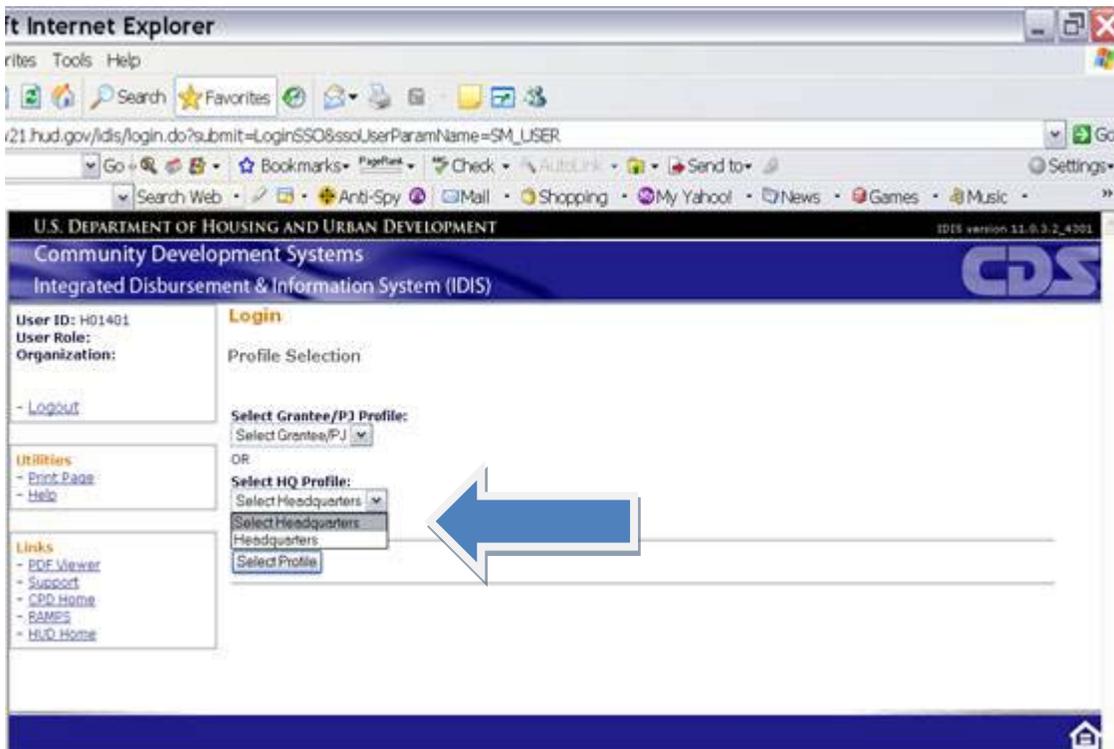
Show Availability

Program: (tip)	Grant Year: (tip)	Grant #: (tip)	Fund Type: (tip)	Show
Select	Select	Select	Select	Show

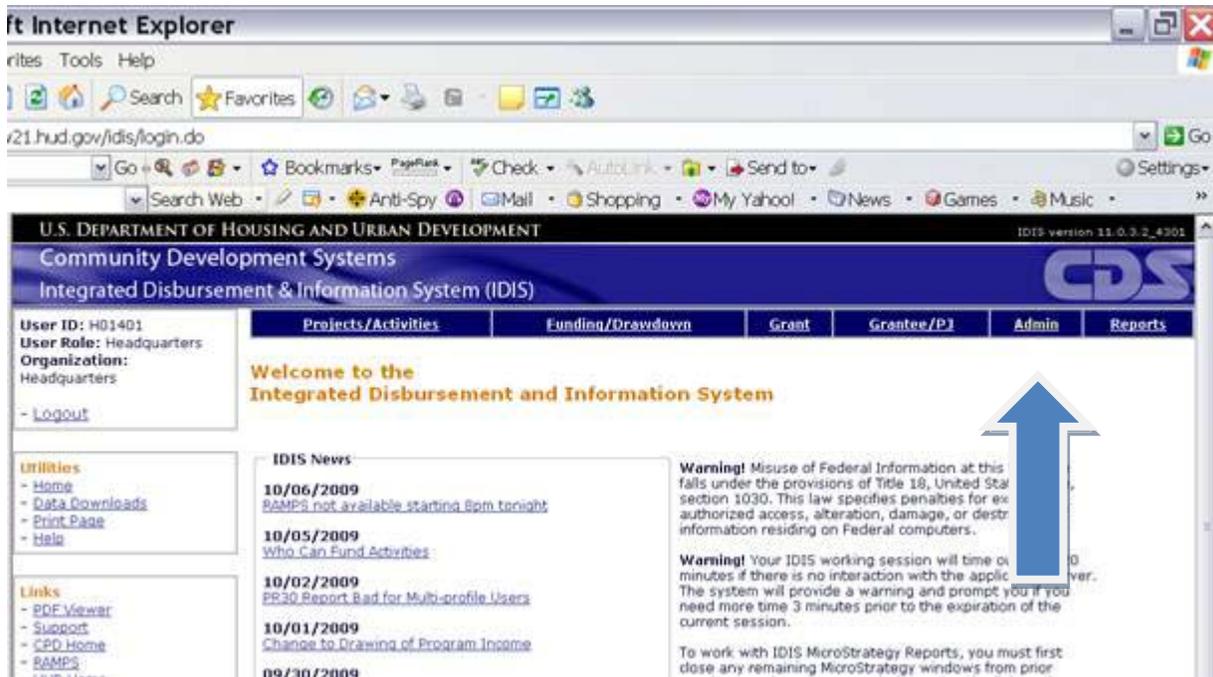
9. Admin Functions

HQ Administrators – editing a users profile

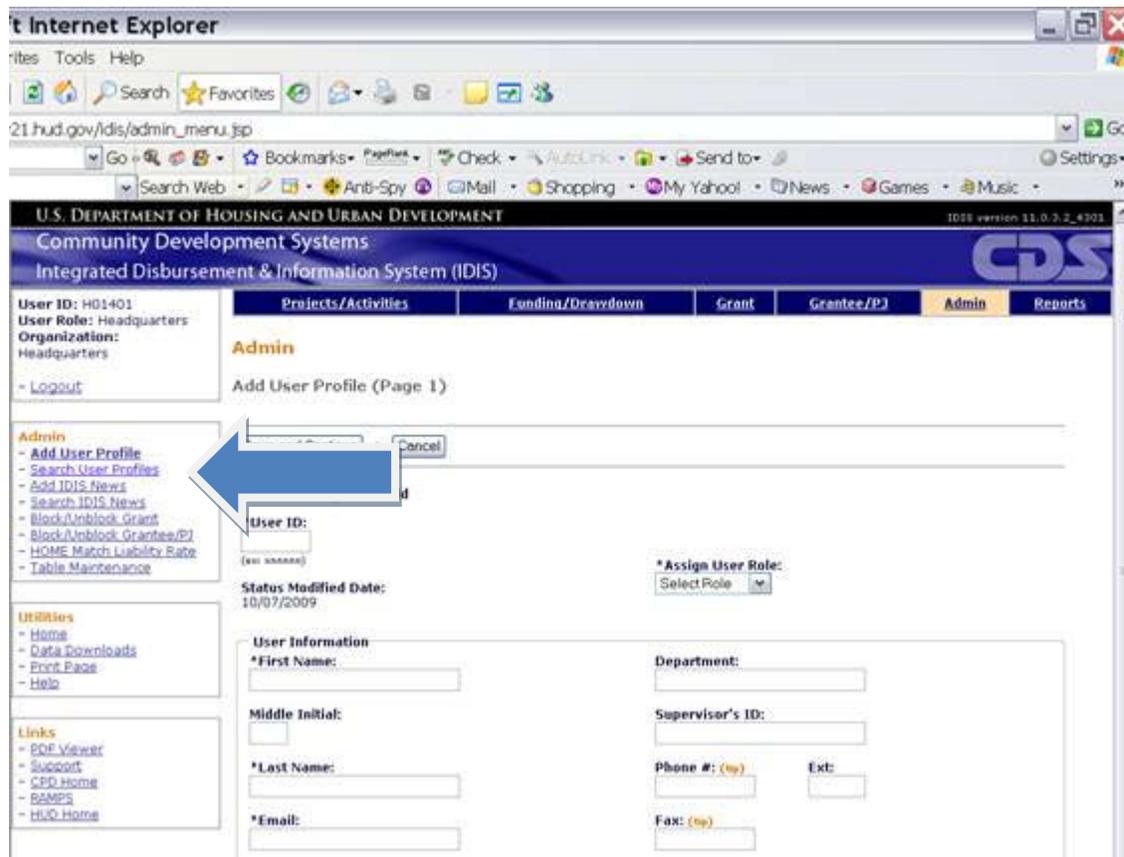
1 when prompted to select a profile select Headquarters



2 choose Admin from upper toolbar



3 choose “search user profile” from right hand side of screen



4 enter users name or User id to search

9.1 Grantee - Editing a User Profile

1) Click the **Admin** tab at top of screen

IDIS OnLine Quick Tips User Guide

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C15581
User Role: Grantee
Organization:
LOUISVILLE - JEFFERSON
COUNTY METRO GOVT
[Logout](#)

Projects/Activities Funding/Drawdown Grant Grantee/PJ Admin Reports

**Welcome to the
Integrated Disbursement and Information System**

IDIS News
No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

- 2) **Search User Profiles** page will appear
- 3) Enter applicable **Search Criteria**, including **User ID, First Name, Last Name, Select Role, Organization name**, and/or **Status**
- 4) Click the **Search** button

The screenshot shows the IDIS web application interface. At the top, it displays 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. Below this is a blue header for 'Community Development Systems Integrated Disbursement & Information System (IDIS)' with the CDS logo. A navigation bar contains tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin' (which is highlighted), and 'Reports'. On the left side, there are three menu boxes: 'User Profile' (with fields for User ID: C15581, User Role: Grantee, Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT, and a Logout link), 'Admin' (with links for Search User Profiles and Table Maintenance), and 'Utilities' (with links for Home, Data Downloads, Print Page, and Help). Below these is a 'Links' box with links for PDF Viewer, Support, CPD Home, and HUD Home. The main content area is titled 'User Profile' and contains a 'Search User Profiles' section. This section includes a 'Search Criteria' box with input fields for 'User ID:', 'First Name:', and 'Last Name:'. Below these are a 'Select Role:' dropdown menu (set to 'All'), an 'Organization name:' input field, and a 'Status:' dropdown menu (set to 'Select Status'). There are 'Search' and 'Reset' buttons at the bottom of the search criteria box.

- 5) Search results page will appear
- 6) Click **Edit** under **Action** column to make any changes to the User Profile

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Headquarters
Organization: Headquarters
[- Logout](#)

Admin
[- Add User Profile](#)
[- Search User Profiles](#)
[- HOME Match Liability Rate](#)
[- Table Maintenance](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

[Projects/Activities](#)
[Funding/Drawdown](#)
[Grant](#)
[Grantee/PJ](#)
[Admin](#)
[Reports](#)

User Profile

Search User Profiles

Search Criteria

User ID: <input type="text" value="c15581"/>	First Name: <input type="text"/>	Last Name: <input type="text"/>
<small>(ex: snnnnn)</small> Select Role: <input type="text" value="All"/>	Organization name: <input type="text"/>	Status: <input type="text" value="Select Status"/>

|

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

7) **Edit User Profile** page will appear

8) Enter changes as needed

9) Click the **Save** button

User Role: Headquarters Organization: Headquarters - Logout	Admin Edit User Profile (Page 1)
Admin - Add User Profile - Search User Profiles - HOME Match Liability Rate - Table Maintenance	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="History"/> <input type="button" value="Reset Status"/>
Utilities - Home - Data Downloads - Print Page - Help	*Indicates Required Field *User ID: <input type="text"/> <small>(ex: xxxxxxx)</small> *Status: Active <input type="button" value="v"/> Status Modified Date: 06/18/2009
Links - PDF Viewer - Support - CPD Home - HUD Home	Existing User Roles: Headquarters Field Office Grantee
User Information	
*First Name: <input type="text"/>	Department: <input type="text"/>
Middle Initial: <input type="text"/>	Supervisor's ID: <input type="text"/>
*Last Name: <input type="text"/>	Phone #: (tip) <input type="text"/> Ext: <input type="text"/>
*Email: <input type="text"/>	Fax: (tip) <input type="text"/>

9.2 Grantee - Editing Existing User Roles

- 1) Click the **Admin** tab at top of screen

The screenshot displays the IDIS Admin interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is visible in the top right corner. A navigation bar contains tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The 'Admin' tab is selected. On the left side, there is a sidebar with user information: 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT'. Below this, there are sections for 'Admin' (with links for 'Search User Profiles' and 'Table Maintenance'), 'Utilities' (with links for 'Home', 'Data Downloads', 'Print Page', and 'Help'), and 'Links' (with links for 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'). The main content area is titled 'User Profile' and features a search form. The search form includes a 'Search Criteria' section with fields for 'User ID:', 'First Name:', 'Last Name:', 'Select Role:' (with a dropdown menu set to 'All'), 'Organization name:', and 'Status:' (with a dropdown menu set to 'Select Status'). There are 'Search' and 'Reset' buttons at the bottom of the search form.

- 2) **Search User Profiles** page will appear

- 3) Enter applicable Search Criteria, including **User ID, First Name, Last Name, Select Role, Organization name,** and/or **Status**
- 4) Click the **Search** button

The screenshot shows the IDIS web application interface. At the top, it displays 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. The main header is 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. Below the header is a navigation menu with tabs: 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin' (highlighted), and 'Reports'. On the left side, there is a sidebar with user information: 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT'. Below this is a 'Logout' link. The main content area is titled 'User Profile' and contains a 'Search User Profiles' section. This section has a 'Search Criteria' box with the following fields: 'User ID:' (text input), 'First Name:' (text input), 'Last Name:' (text input), 'Select Role:' (dropdown menu with 'All' selected), 'Organization name:' (text input), and 'Status:' (dropdown menu with 'Select Status' selected). Below these fields are 'Search' and 'Reset' buttons. The sidebar also includes 'Admin' links ('Search User Profiles', 'Table Maintenance'), 'Utilities' links ('Home', 'Data Downloads', 'Print Page', 'Help'), and 'Links' ('PDF Viewer', 'Support', 'CPD Home', 'HUD Home').

- 5) Search results page will appear

- 6) Click **Edit** under **Action** column to make any changes to the User Profile

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Headquarters
Organization: Headquarters
[Logout](#)

Admin
- [Add User Profile](#)
- [Search User Profiles](#)
- [HOME Match Liability Rate](#)
- [Table Maintenance](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

User Profile

Search User Profiles

Search Criteria

User ID: First Name: Last Name:
(ex: xxxxxxx)

Select Role: Organization name: Status:

|

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

- 7) **Edit User Profile** page will appear

- 8) Click **Grantee** link under **Existing User Roles**

User Role: Headquarters
Organization: Headquarters
[Logout](#)

Admin
- [Add User Profile](#)
- [Search User Profiles](#)
- [HOME Match Liability Rate](#)
- [Table Maintenance](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Admin

Edit User Profile (Page 1)

| | |

***Indicates Required Field**

*User ID:
(ex: xxxxxxx)

*Status:

Status Modified Date: 06/18/2009

Existing User Roles:
[Headquarters](#)
[Field Office](#)
[Grantee](#)

User Information

*First Name: Department:

Middle Initial: Supervisor's ID:

*Last Name: Phone #: (tip) Ext:

*Email: Fax: (tip)

- 9) **Edit Grantee/PJ User Profile** page will appear

14) **Grantee/PJ User Profile Privileges** can be selected or removed

15) After all selections have been made click the **Save** button

The screenshot displays the 'Admin' section of the IDIS OnLine interface. At the top, there are navigation tabs: 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin' (highlighted), and 'Reports'. The left sidebar contains several utility and link menus:

- Admin:** Search User Profiles, Table Maintenance
- Utilities:** Home, Data Downloads, Print Page, Help
- Links:** PDF Viewer, Support, CPD Home, HUD Home

The main content area is titled 'Admin' and 'Edit Grantee/PJ User Profile (Page 4)'. It features a header with 'Save', 'Cancel', and 'History' buttons. Below this, the user's details are listed:

- User ID:** C15581
- Name:** TONY PULLIAM
- Assign User Role:** Grantee
- Status:** Active (dropdown menu)
- Grantee/PJ Name:** VERMONT

The 'Program Privileges' section includes:

- CDBG
- ESG
- HOME
- HOPWA

The 'Administrative Privileges' section includes:

- Administration
- Report
- Table Maintenance
- Add Subordinate
- Edit Subordinate

The 'Activity Privileges' section includes:

- Set up Activity
- Update Activity
- View Activity

The 'Drawdown Privileges' section includes:

- Drawdown Approval
- Request Drawdown
- View Drawdown

9.3 Grantee - Viewing Existing User Roles

- 1) Click the **Admin** tab at top of screen

The screenshot displays the IDIS web application interface. At the top, it shows the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is visible in the top right corner. Below the header is a navigation menu with tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin' (which is highlighted), and 'Reports'. On the left side, there is a sidebar with user information: 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT'. Below this, there are sections for 'Admin' (with links for 'Search User Profiles' and 'Table Maintenance'), 'Utilities' (with links for 'Home', 'Data Downloads', 'Print Page', and 'Help'), and 'Links' (with links for 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'). The main content area is titled 'User Profile' and contains a search form. The search form has a title 'Search User Profiles' and a search criteria section with fields for 'User ID:', 'First Name:', 'Last Name:', 'Select Role:' (with a dropdown menu set to 'All'), 'Organization name:', and 'Status:' (with a dropdown menu set to 'Select Status'). There are 'Search' and 'Reset' buttons at the bottom of the search criteria section.

- 2) **Search User Profiles** page will appear
- 3) Enter applicable **Search Criteria**, including **User ID, First Name, Last Name, Select Role, Organization name,** and/or **Status**
- 4) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C15581
User Role: Grantee
Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT
[- Logout](#)

Admin
[- Search User Profiles](#)
[- Table Maintenance](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

User Profile

Search User Profiles

Search Criteria

User ID:
(ex: xxxxxxx)

First Name:

Last Name:

Select Role:

Organization name:

Status:

|

- 5) Search results page will appear
- 6) Click **View** under **Action** column

The screenshot shows the 'User Profile' search results page in the IDIS system. The page header includes 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The user is logged in as 'User ID: C32177' with the role 'Headquarters'. The page has a navigation menu with 'Admin' selected. On the left, there are sections for 'Admin', 'Utilities', and 'Links'. The main content area is titled 'User Profile' and contains a search form with the following criteria: User ID: c15581, First Name: (empty), Last Name: (empty), Select Role: All, Organization name: (empty), and Status: Select Status. Below the search form, there is a table with one result:

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

- 7) **View User Profile** page will appear

The screenshot shows the 'View User Profile' page for user ID C15581. The page header is the same as the previous screenshot. The user is logged in as 'User ID: C32177' with the role 'Headquarters'. The page has a navigation menu with 'Admin' selected. On the left, there are sections for 'Admin', 'Utilities', and 'Links'. The main content area is titled 'User Profile' and contains the following information:

User ID: C15581
Status: Active
Status Modified Date: 01/30/2009

Existing User Roles:
[Headquarters](#)
[Field Office](#)
[Grantee](#)

User Information:
First Name: TONY
Middle Initial:
Last Name: PULLIAM
Email: tony.pulliam@psi.com

Department:
Supervisor's ID:
Phone #:
Ext:
Fax:

10. Logging Out of IDIS OnLine

- 1) Once the user has logged into IDIS OnLine, the user can log out anytime by clicking the **Logout** button on the top left portion of page:

The screenshot shows the IDIS OnLine interface. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below that is a blue header with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" and the "CDS" logo. A navigation bar contains "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". On the left, a user profile box shows "User ID: C32177", "User Role: Grantee", and "Organization: BOSTON", with a "- Logout" link. The main content area has a "Welcome to the Integrated Disbursement and Information System" message. There are sections for "Utilities" (Home, Data Downloads, Print Page, Help) and "Links" (PDF Viewer, Support, CPD Home, HUD Home). A "Warning!" message states: "Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers." Another "Warning!" message states: "Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session." Below that, it says: "To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a new window using the link on the IDIS Reports page." At the bottom, it says "Content updated Nov 14, 2008" and provides contact information for the U.S. Department of Housing and Urban Development.

- 2) IDIS OnLine Logout page will appear

The screenshot shows the IDIS OnLine interface after logging out. The header and navigation bar are the same as in the previous screenshot. The user profile box is now empty. The main content area has a "You are not logged in to IDIS" message. Below that, it says: "• You have been logged out from IDIS and your session has been cleared." At the bottom, it says: "The IDIS login page will be displayed shortly, or click [here](#) if the page does not refresh." The "Links" section on the left now includes "PDF Viewer", "Support", "CPD Home", and "HUD Home".