

IDIS Local Administrative Rights in IDIS

As an IDIS Local Administrator, you can make changes to the access rights of local IDIS users. You have the right to execute your authorizing official's decisions about levels of access for the people under his/her control, rather than relying on HUD HQ to do it. You are able to both remove and add functions except ADMINISTRATION (LOCAL) for all your Production IDIS users. In addition, you can delete a person's access to IDIS when he/she retires, switches jobs, or should be stopped from using IDIS for whatever reason.

These are some things you don't have the power to do:

1. Create other Local Administrators.
2. Create new IDIS IDs.
3. Change the names of IDIS people (for marriage/divorce, etc.)
4. Change the grantee data that IDIS people can work with.
5. Un-delete users. More about that, below.

The actions listed above require you to send in the IDIS Access Request Form through your local CPD representative, to HQ HUD.

Please inform your authorizing official, that you as an IDIS Local Administrator are able to act for him/her to carry out his/her decisions to define who can set up activities, who can request drawdowns, who can approve drawdowns, etc. You must have the complete trust of the authorizing official. The only other person who will be able to do what you can do for your IDIS users is another Local Administrator in your office, Field Office Administrator, or a HUD System Administrator for IDIS.

In order for you to be able to demonstrate that you are carrying out the decisions of the authorizing official, maintain a copy of the IDIS Access Request form for your own records. Keep these forms on file to document who, what, when, where, and why particular functions have been given to particular staff. Send the original IDIS Access Request form to your local HUD CPD office to request the creation of new IDs, to designate IDIS Local Administrators, to change the names of IDIS people, or to change or add the grantee whose data a person will be working with

To keep changes under control, HUD recommends your organization have at least 2 Local Administrators, one as the primary and one as the backup. What one Local Administrator does, another Local Administrator can undo. For instance, one Local Administrator may change the profile of a person to prevent the ability to approve drawdowns, while another Local Administrator might re-enable that ability. Keep changes under control by coordinating what you do with your fellow Local Administrator.

To activate IDIS IDs, or disable IDIS IDs:

1. IDIS allows you, the Local Administrator, as well as the System Administrator at HUD, to "flag" each person as Active, Inactive, or Deleted. Please note that you can temporarily make someone Inactive, and make him or her Active later, but, if you Delete someone, only the IDIS Security Administrator at HUD HQ can undo that. To permanently prevent a person from getting into IDIS, delete him/her; to only temporarily prevent someone from using IDIS, make him/her "inactive".
2. When a new IDIS person is assigned an ID, the IDIS System Administrator at HUD HQ creates the initial profile which defines what data a person has access to, and what s/he can do with that data. **You can "fine tune" each user's profile, by subtracting (or adding back) the functions that each user should have. To do this properly, you will have to be aware of what the local authorizing official wants each of his/her users to do in IDIS, and will have to keep track of changes he/she decides to have you make.**

Under the Edit Grantee /PJ User Profile Page, The Functions Below Can Be Turned On / Off:

STATUS: (Active, Inactive, or Deleted)

- | | |
|---|--|
| <input type="checkbox"/> SET UP ACTIVITY | <input type="checkbox"/> DRAWDOWN APPROVAL |
| <input type="checkbox"/> UPDATE ACTIVITY | <input type="checkbox"/> REQUEST DRAWDOWN |
| <input type="checkbox"/> VIEW ACTIVITY | <input type="checkbox"/> TABLE MAINTENANCE |
| <input type="checkbox"/> ADMINISTRATION (LOCAL) | <input type="checkbox"/> REPORT |
| <input type="checkbox"/> ADD SUBORDINATE | <input type="checkbox"/> EDIT SUBORDINATE |

There Are Four Program Areas That Can Be Turned On Or Off:

- | | |
|---|--|
| <input type="checkbox"/> CDBG PROGRAM
(CDBG-R) | <input type="checkbox"/> ESG PROGRAM
(HPRP) |
| <input type="checkbox"/> HOME PROGRAM
(TCAP) | <input type="checkbox"/> HOPWA PROGRAM |

What to do to change a profile:

1. Obtain a list of the IDs for all your users. Your local CPD representative receives a listing of these frequently.
2. Know what functions the authorizing official has decided to allow for each person. Use the IDIS Access Request form to document these decisions.
3. Under the Admin Tab, Select “Search User Profiles” and enter User Information (User ID, or Name) for profile information on that particular user. Once you get to this page, you should select Edit Access and then it will take you to the Edit Grantee/PJ User Profile Page.
4. On the Edit Grantee /PJ User Profile Page, you will be able to update user functions, as well as, program areas within IDIS for your colleagues.
5. Verify the information on the first Edit User Profile Screen and select Save.
6. If any information must be changed, contact your local CPD representative. The only change **you** can make on that screen is to "flag" the user as ACTIVE, INACTIVE, or DELETED. You can't reverse a deletion, only HUD HQ can.
7. When you have turned on/off the functions that reflect the decisions of the authorizing official, press Save.

The Functions to Assign:

On the IDIS Access Request Form these are the options:

Main Functions

Set Up Activity
Request Drawdown
Approve Drawdown
Local IDIS Administrator
View Activities and Get Reports, Only

HUD Abbreviated Codes

S
D
P
A
Blank-If none of the above are specified

The CPD representatives in the local HUD offices, and the System Administrator at HUD, use "S, D, P, and A" to describe which users have which rights.

Note that every user has VIEW ACTIVITY and REPORTS turned on automatically, via the initial profile set

PLEASE REMEMBER: Even if a person has the authority to both Request and Approve drawdowns, IDIS has a rule that says the same person cannot approve his/her own draw requests. If person A requests a draw, person B has to approve it; person A cannot. Therefore, the person who makes the drawdown requests, cannot approve the drawdown despite the fact that they can have both profiles.

- **Please remind all your staff to go into IDIS at least once a month**
- **to keep their IDIS ID from lapsing.**

- **A person who stays out of IDIS too long may have to re-submit a request form to get back in to IDIS, and will certainly experience a delay getting back into IDIS even if no paperwork is needed.**

IDIS Security Administrator