

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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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 Recovery), 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 login page. The header includes 'Homes & Communities' and 'U.S. Department of Housing and Urban Development'. The main navigation bar has 'Community Planning & Development', 'En español', 'Contact Us', 'Text only', and 'Search/index'. The central content area is titled 'Log on to IDIS'. Below this, there is a 'What's New' section with a yellow background, containing links to 'IDIS Online Data Download Documentation' and 'How to Run Reports in IDIS OnLine'. A '2009 Formula Grant Allocations' announcement is also present. To the right, there are several utility boxes: 'Information by State' with a 'Print version' link, 'Email the CPD Web Team', 'Security Issues' with links to 'Keeping Your IDIS Account Active', 'ID and Password Assistance', and 'Separation of Duties', 'Helpful Numbers' with links to 'IDIS Password Reset' and 'Technical Assistance Unit', and 'Related Information' with a link to 'Access the IDIS Legacy Pseudo Region'. A left sidebar contains various navigation options like 'Community Planning and Development', 'Online Systems/Databases', 'IDIS', 'HUD news', 'Homes', 'Resources', 'Communities', 'Working with HUD', and 'Tools'.

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

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

- I. Grantee users will use their C# or B# as their Username. Their temporary password is the first initial (lowercase), and the last initial (lowercase) plus the last 4 digits of their Social Security Number. For example, if your name is ABRAHAM LINCOLN your temporary password will be **al1234**. You will be prompted to change your 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 employees access IDIS with their regular H-ID and regular network password. There is no need to change your IDIS password as it is linked and synchronized to the Department's "Active Directory." As long as your regular network ID and password work, you will have access to IDIS. Whenever you change your network password, your IDIS password will change automatically.

- 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 for 'Community Planning and Development' including 'IDIS', 'Log on to IDIS', 'Getting Started', 'Training', 'Reporting and Guidance', and 'Library'. The main content area has a red header 'Community Planning & Development' and a 'IDIS Login' section. It prompts the user to enter a 'Username' (C***** or H*****) and a 'Password' into text boxes, followed by a 'Login' button. At the bottom, there are links for 'FOIA', 'Privacy', 'Web Policies and Important Links', and 'Home', along with the HUD logo and contact information for the U.S. Department of Housing and Urban Development.

- 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)

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)

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 1: Your IDIS OnLine password will be locked after 3 successive incorrect password attempts. If this happens, you must call **1-888-297-8689** option 3 for a reset. You will be asked several security questions to verify your identity.

NOTE 2: IDIS OnLine passwords expire every 90 days. IDIS OnLine will issue a warning each day starting 10 days before your password expires, reminding you to change your password.

Grantee users who have not been active (no logins) for 180 days will be automatically disabled. Grantee users who wish to renew a disabled ID must re-submit an IDIS Access Request Form to their CPD Representative, indicating “renew lapsed ID.”

NOTE 3: 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 user interface. At the top, it shows 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. Below this is the 'Community Development Systems Integrated Disbursement & Information System (IDIS)' header with 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, a sidebar shows user information: 'User ID: C01133', 'User Role: Grantee', 'Organization: MILWAUKEE', and 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. 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, there 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, 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'. A home icon is visible in the bottom right corner.

- 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" value="v"/> <input type="checkbox"/> Add New Program Year: <input type="text" value=""/> (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="button" 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, 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 bar 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 showing '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. Below this is an 'IDIS News' section with the text 'No news to display.' To the right of the news section, there are two warning messages: one about the 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, including the address '451 7th Street S.W., Washington, DC 20410' and phone numbers '(202) 708-1112' and '(202) 708-1455'. A small home icon is located in the bottom right corner of the page.

- 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 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 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" 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 search criteria form, there are "Search" and "Reset" buttons.

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

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
[- Logout](#)
Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

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: <input type="text" value="14"/>	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

- 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, 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 several tabs: '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 the following details: 'User ID: C01133', 'User Role: Grantee', 'Organization: MILWAUKEE', and a '- Logout' link. Below this are two utility boxes. The first, titled 'Utilities', contains links for '- Home', '- Data Downloads', '- Print Page', and '- Help'. The second, titled 'Links', 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. 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, there 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'. A home icon is located in the bottom right corner of the page.

- 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 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 showing "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE", along with a "Logout" link. Below this are sections for "Activity", "Project", "Utilities", and "Links", each with sub-links like "Add", "Search", "Copy", "Home", "Data Downloads", "Print Page", "Help", "PDF Viewer", "Support", "CPD Home", and "HUD Home". The main content area is titled "Project" and "Search Projects". It contains a "Search Criteria" section 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), and "Status" (a dropdown menu with "Select" as the current value). At the bottom of the search criteria section, there 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																				
<p>User ID: C01133 User Role: Grantee Organization: MILWAUKEE</p> <p>- Logout</p> <hr/> <p>Activity - Add - Search</p> <hr/> <p>Project - Add - Search - Copy</p> <hr/> <p>Utilities - Home - Data Downloads - Print Page - Help</p> <hr/> <p>Links - PDF Viewer - Support - CPD Home - HUD Home</p>	<p style="text-align: center;">Project</p> <p>Search Projects</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Search Criteria</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Program Year: 2008 <input type="button" value="v"/></td> <td style="width: 33%;">Program: <input type="button" value="v"/></td> <td style="width: 33%;">Project Title: <input style="width: 90%;" type="text"/></td> </tr> <tr> <td>IDIS Project ID: <input style="width: 90%;" type="text"/></td> <td>Grantee/PJ Project ID: <input style="width: 90%;" type="text"/></td> <td>Status: Select <input type="button" value="v"/></td> </tr> </table> <p style="text-align: center; margin-top: 5px;"> <input type="button" value="Search"/> <input type="button" value="Reset"/> </p> </div> <p style="margin-top: 10px;">Results Page 1 of 1</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-decoration: underline;">Program Year</th> <th style="text-decoration: underline;">IDIS Project ID</th> <th style="text-decoration: underline;">Grantee/PJ Project ID</th> <th style="text-decoration: underline;">Project Title</th> <th style="text-decoration: underline;">Project Owner</th> <th style="text-decoration: underline;">Status</th> <th style="text-decoration: underline;">Action</th> </tr> </thead> <tbody> <tr> <td>2008</td> <td>14</td> <td></td> <td>testing</td> <td>MILWAUKEE, WI</td> <td>Open</td> <td>Edit View</td> </tr> </tbody> </table>						Program Year: 2008 <input type="button" value="v"/>	Program: <input type="button" value="v"/>	Project Title: <input style="width: 90%;" type="text"/>	IDIS Project ID: <input style="width: 90%;" type="text"/>	Grantee/PJ Project ID: <input style="width: 90%;" type="text"/>	Status: Select <input type="button" value="v"/>	Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action	2008	14		testing	MILWAUKEE, WI	Open	Edit View
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Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action																				
2008	14		testing	MILWAUKEE, WI	Open	Edit View																				

6) **View Project** page will appear

- Logout	View Project						
Activity - Add - Search	Return To Projects						
Project - Add - Search - Copy	Grantee/PJ Name: MILWAUKEE						
Utilities - Home - Data Downloads - Print Page - Help	Program Year: 2008						
Links - PDF Viewer - Support - CPD Home - HUD Home	IDIS Project ID: 14						
	Status: Open						
	Project Title: testing						
	Grantee/PJ Project ID:						
	Description: <input type="text"/>						
	Allow Another Organization to Set up Activities under this Project:						
	Estimated Amount (Including Program Income)						
<table border="1"><tr><td>CDBG</td><td>\$500,000.00</td></tr><tr><td>HOME</td><td>\$0.00</td></tr><tr><td>ESG</td><td>\$0.00</td></tr></table>	CDBG	\$500,000.00	HOME	\$0.00	ESG	\$0.00	
CDBG	\$500,000.00						
HOME	\$0.00						
ESG	\$0.00						

3.4 Copy Projects

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

IDIS OnLine Quick Tips User Guide

The screenshot shows the IDIS home page. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below that is the "Community Development Systems Integrated Disbursement & Information System (IDIS)" header with the CDS logo. A navigation bar contains tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". On the left, a sidebar shows user information: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and 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. It includes an "IDIS News" section with "No news to display." and two "Warning!" messages: one about federal information misuse and another about session timeouts. A "Content updated Nov 14, 2008" note and contact information for the U.S. Department of Housing and Urban Development are also present.

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

The screenshot shows the "Project" search page. The header and navigation bar are identical to the previous screenshot. The "Projects/Activities" tab is highlighted. The sidebar on the left now includes a "Project" section with "Add", "Search", and "Copy" links. The main content area is titled "Project" and "Search Projects". It contains a "Search Criteria" form 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 menu). At the bottom of the form 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 <input type="text"/>	Program: <input type="text"/>	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 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"/>
			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"/>	Program: <input type="text"/>	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

- 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](#)

Save
Cancel

***Indicates Required Field**

***Activity Owner:**
MILWAUKEE, WI

***Program Year:**
Select

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

***Activity Name:**

Grantee/PJ Activity ID:

Project

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

Utilities

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

Links

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

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
[PDF Viewer](#)
[Support](#)
[IPD Home](#)
[IUD Home](#)

Edit Activity

• The new activity has been saved.

|

***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:

Activity

Program	*Activity Category <small>(tip)</small>	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG	05 - Public Services (General)	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomp."/>
ESG	None	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="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 user information on the left includes "User ID: C15581", "User Role: Grantee", and "Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT". The main navigation bar includes "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Activity" section is active, showing a search form with the following fields: "Program:" (dropdown menu set to "All"), "IDIS Project ID:" (text input), "Status:" (dropdown menu set to "All"), "Activity Name:" (text input), "IDIS Activity ID:" (text input), "Program Year:" (dropdown menu set to "Select"), "Grantee/PJ Activity ID:" (text input), and "Activity Owner:" (dropdown menu set to "LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY"). There are "Search" and "Reset" buttons at the bottom of the form. On the left sidebar, there are sections for "Activity" (Add, Search), "Project" (Add, Search, Copy), "Utilities" (Home, Data Downloads, Print Page, Help), and "Links" (PDF Viewer, Support, CPD Home, HUD Home).

- 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

- 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:**

Project

[- Add](#)

[- Search](#)

[- Copy](#)

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	<input type="text" value="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"/>

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Links

[- PDF Viewer](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

- 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)

Page 28

- 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

Edit HOME Setup Detail

Tenant-Based Rental Assistance (TBRA)

Activity

[- Add](#)

[- Search](#)

|

*** 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:**
Create suitable living environments

***Performance Outcome:**
Availability/accessibility

Will this activity be carried out by a faith-based organization?

Yes No

Beneficiary Units Total: 1

Page 1 of 1

Last Name	# of Bdms	Security Deposit	Monthly Rent			Household					Tenant Contract			Action
			Tenant Rent	TBRA Subsidy	Total Rent	Percent Area Median Income	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 displays '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'. The main navigation tabs are 'Projects/Activities', 'Funding/Drawdown', 'Grant', and 'Grantee/PJ'. The 'Funding/Drawdown' tab is active, showing the 'Activity Funding' section. Below this, there is 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), and 'Grantee/PJ Activity ID:' (text input). There are also dropdown menus for 'Activity Status:' (set to 'All') and '*Activity Owner:' (set to 'BOSTON, MA'). 'Search' and 'Reset' buttons are located at the bottom of the search form. On the left side, there are several utility menus: 'Activity Funding' with a 'Search' link, 'Drawdown' with 'Create Voucher', 'Search Voucher', and 'Approve Voucher' links, 'Receipt' with 'Add', 'Search', and 'Search Accounts' links, and 'Utilities' with 'Home', 'Data Downloads', 'Print Page', and 'Help' links.

- 5) The Search Results page will appear

6) Select **Add-Edit** under the Action column

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](#)

Activity Funding

Search for Activities to Fund

Search Criteria

Program: All <input type="button" value="v"/>	IDIS Project ID: <input type="text"/>	Activity Status: All <input type="button" value="v"/>
Activity Name: <input type="text"/>	IDIS Activity ID: 14626	*Activity Owner: BOSTON, MA <input type="button" value="v"/>
Program Year: All <input type="button" value="v"/>	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 RESTAURTANT	2008/17	14626		Open	BOSTON, MA	Add-Edit

7) The Edit Activity Funding page will appear

Page 31

8) Select **Add-Edit-View** under the Action column for the appropriate activity

Projects/Activities
Funding/Drawdown
Grant
Grantee/ID

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: All Recipients	Program: All Programs	Fund Type: All Fund Types
--	---------------------------------	-------------------------------------

|

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](#)

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 (yy)	Funded Amount	Drawn Amount
2007	\$ 100,000.00	\$0.00

|
 |

Links

[- PDF Viewer](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

12) **Activity funded successfully** message will appear

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](#)

Activity Funding

Add-Edit Funding Line Item

- Activity funded successfully.

[Return to Add-Edit Funding](#)

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 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

Current Funding for This Source

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 and highlighted in yellow), 'Grant', and 'Grantee/PJ'. On the left side, there is a user information box with 'User ID: C32177', 'User Role: Grantee', and 'Organization: BOSTON', along 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 a search form with the following fields: 'Program:' (dropdown menu set to 'All'), 'Activity Status:' (dropdown menu set to 'All'), 'Activity Name:' (text input), 'IDIS Project ID:' (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 search 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	* Indicates Required Field * Voucher Created For: (tip) BOSTON, MA <input type="text"/> <input type="button" value="Select Date"/> <small>(ex: mm/dd/yyyy)</small>																																																																											
Utilities - Home - Data Downloads - Print Page - Help	* Activity Owner: (tip) BOSTON, MA <input type="text"/>																																																																											
Links - PDF Viewer - Support - CPD Home - HUD Home	* IDIS Activity ID <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> <input type="button" value="Search for Activities"/> <input type="button" value="Reset"/>				14629																																																																							
14629																																																																												

- 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

Voucher Created For:
BOSTON, MA

Activity Owner:
BOSTON, MA

Activity Name:
22 FERNBORO STREET

Grantee/PJ Activity ID:

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 style="width: 50px;" 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 selected), '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

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", "Grant", and "Grantee/PJ". The "Funding/Drawdown" tab is currently selected.

The left sidebar contains several menu items:

- 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](#)

The main content area is titled "Drawdown" and "Search Vouchers". It features a "Search Criteria" section with the following fields:

- IDIS Voucher #:** [Text Input Field]
- IDIS Activity ID:** [Text Input Field]
- *Activity Owner:** [Dropdown Menu] (Current selection: BOSTON, MA)
- Earliest Creation Date:** [Text Input Field] [Select Date](#)
(ex: mm/dd/yyyy)
- Line Item Status:** [Dropdown Menu] (Current selection: Select)

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

- 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](#)

- 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 #: 5000190/1	Grant #: B07MC250002	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

LOCCS Confirmation Information

Confirm Batch #:

Confirm Batch Date:

Confirmation Code:

Pay Method:

Payment Date:

Schedule #:

Reschedule:

Effective Date:

Voucher Update

Voucher Updated By: C32177

Date Updated: 06/10/2009

Special Remarks:

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](#)

Drawdown

Maintain and Approve Voucher

- Voucher item approved successfully

[Return to Search Vouchers](#)

Activity Funding

[- Search](#)

Drawdown

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

Voucher Created For:
BOSTON, MA

Activity Owner:
BOSTON, MA

IDIS Voucher #:
5000190

Created By:
C32177

Creation Date:
06/10/2009

Receipt

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

Utilities

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

Links

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

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 View

[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 **CDS**

Integrated Disbursement & Information System (IDIS)

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

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

Activity Funding

Search for Activities to Fund

Search Criteria

Program: IDIS Project ID: Activity Status:

Activity Name: IDIS Activity ID: *Activity Owner:

Program Year: Grantee/PJ Activity ID:

|

Activity Funding
[- Search](#)

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

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

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

- 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

<p>Organization: MILWAUKEE</p> <p>- Logout</p>	<p style="text-align: center;">Receipt</p> <p style="text-align: center;">Add Receipt</p> <hr/> <p style="text-align: center;"><input type="button" value="Save"/> <input type="button" value="Reset"/></p> <hr/> <p>*Indicates Required Field</p> <p>Receipt Created For: MILWAUKEE</p> <p style="text-align: right;">Receipt Status: Original</p>										
<p>Activity Funding</p> <p>- Search</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Receipt</p> <table style="width: 100%;"> <tr> <td style="width: 50%;"> <p>*Program: <input type="text" value="Select Program"/></p> </td> <td style="width: 50%;"> <p>Receipt Type: <input type="text" value="Select Type"/></p> </td> </tr> <tr> <td> <p>*Program Year: <input type="text"/></p> </td> <td> <p>IDIS Activity ID: <input type="text"/></p> </td> </tr> <tr> <td> <p>*Source Type: <input type="text" value="Select Source"/></p> </td> <td> <p>Matrix Code: <input type="text" value="Select Code"/></p> </td> </tr> <tr> <td> <p>*Fund Type: <input type="text" value="Select"/></p> </td> <td> <p>Estimated Amount: \$ <input type="text" value="0.00"/></p> </td> </tr> <tr> <td> <p>*Amount: \$ <input type="text" value="0.00"/></p> </td> <td> <p>Grantee Receipt #: <input type="text"/></p> </td> </tr> </table> </div>	<p>*Program: <input type="text" value="Select Program"/></p>	<p>Receipt Type: <input type="text" value="Select Type"/></p>	<p>*Program Year: <input type="text"/></p>	<p>IDIS Activity ID: <input type="text"/></p>	<p>*Source Type: <input type="text" value="Select Source"/></p>	<p>Matrix Code: <input type="text" value="Select Code"/></p>	<p>*Fund Type: <input type="text" value="Select"/></p>	<p>Estimated Amount: \$ <input type="text" value="0.00"/></p>	<p>*Amount: \$ <input type="text" value="0.00"/></p>	<p>Grantee Receipt #: <input type="text"/></p>
<p>*Program: <input type="text" value="Select Program"/></p>	<p>Receipt Type: <input type="text" value="Select Type"/></p>										
<p>*Program Year: <input type="text"/></p>	<p>IDIS Activity ID: <input type="text"/></p>										
<p>*Source Type: <input type="text" value="Select Source"/></p>	<p>Matrix Code: <input type="text" value="Select Code"/></p>										
<p>*Fund Type: <input type="text" value="Select"/></p>	<p>Estimated Amount: \$ <input type="text" value="0.00"/></p>										
<p>*Amount: \$ <input type="text" value="0.00"/></p>	<p>Grantee Receipt #: <input type="text"/></p>										
<p>Drawdown</p> <p>- Create Voucher - Search Voucher - Approve Voucher</p>	<p>Comments:</p> <div style="border: 1px solid #ccc; height: 20px;"></div>										
<p>Receipt</p> <p>- Add - Search - Search Accounts</p>											
<p>Utilities</p> <p>- Home - Data Downloads - Print Page - Help</p>											
<p>Links</p> <p>- PDF Viewer - Support - CPD Home - HUD Home</p>											

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"/> <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"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	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"/>
	Comments: <input type="text"/>

6.2 Search /Edit 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) **CDS**

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

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

Activity Funding

Search for Activities to Fund

Search Criteria

Program: All <input type="button" value="v"/>	IDIS Project ID: <input type="text"/>	Activity Status: All <input type="button" value="v"/>
Activity Name: <input type="text"/>	IDIS Activity ID: <input type="text"/>	*Activity Owner: MILWAUKEE, WI <input type="button" value="v"/>
Program Year: All <input type="button" value="v"/>	Grantee/PJ Activity ID: <input type="text"/>	

|

Activity Funding
[Search](#)

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

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

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 ID is C01133, and the user role is Grantee, with the organization listed as MILWAUKEE. The interface includes a navigation menu with options like Projects/Activities, Funding/Drawdown (selected), Grant, Grantee/PJ, Admin, and Reports. The main content area is titled "Receipt" and "Search Receipts". It features a search criteria form with fields for Program (All), Program Year, Fund Type (All), Receipt Number, Amount, Date Created (with a "Select Date" link), Receipt Status (All), and Receipt Created For. There are "Search" and "Reset" buttons at the bottom of the 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).

- 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](#)

[LPD 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

Page 50

- 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: <input type="text"/> 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"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	Comments: <input type="text"/>

6.3 View Receipts

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

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

IDS version 11.0.1_3381

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

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

Activity Funding

Search for Activities to Fund

Search Criteria

Program: All	IDIS Project ID: <input type="text"/>	Activity Status: All
Activity Name: <input type="text"/>	IDIS Activity ID: <input type="text"/>	*Activity Owner: MILWAUKEE, WI
Program Year: All	Grantee/PJ Activity ID: <input type="text"/>	

|

Activity Funding
[Search](#)

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

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

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 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 "Funding/Drawdown" tab is currently selected.

The main content area is titled "Receipt" and "Search Receipts". On the left side, there is a sidebar with several sections:

- 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](#)

The main search area contains the following fields:

- Search Criteria**
 - Program:** All (dropdown menu)
 - Program Year:** [text input field]
 - Fund Type:** All (dropdown menu)
 - Receipt Number:** [text input field]
 - Amount:** [text input field]
 - Date Created:** [text input field] [Select Date](#)
(ex: mm/dd/yyyy)
 - Receipt Status:** All (dropdown menu)
 - Receipt Created For:** [text input field]

At the bottom of the search area, there are two buttons: "Search" and "Reset".

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

Antee
Organization:
LWAUKEE
[Logout](#)

Activity Funding
[Search](#)

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

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

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

Links
[PDF Viewer](#)
[Support](#)
[JPD 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 - Add - Search - Search Accounts	Receipt Status: Original Associated Grant #: M-08-MC-55-0204
Utilities - Home - Data Downloads - Print Page - Help	Receipt Program: HOME Program Year: 2008 Source Type: MC Fund Type: PI Amount: \$4,000.00
Links - PDF Viewer - Support - CPD Home - HUD Home	Receipt Type: IDIS Activity ID: Matrix Code: Grantee Receipt #: Comments: <input type="text"/>

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 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 bar with tabs: 'Projects/Activities', 'Funding/Drawdown' (which is highlighted in yellow), 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left side, there is a user information box containing: '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 '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'), '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'). There is also a 'Grantee/PJ Activity ID:' (text input) field. At the bottom of the search criteria form 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', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The 'Funding/Drawdown' tab is selected. On the left side, there is a user information box with 'User ID: C01133', 'User Role: Grantee', and 'Organization: MILWAUKEE'. 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 'View Receipt Accounts'. It contains a search form with the following fields: 'Search Criteria' with a 'Program:' dropdown menu set to 'All', a 'Program Year:' text input field, and a 'Fund Type:' dropdown menu set to 'All'. Below these 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 version number 'IDIS version 11.0.1_3381' is visible in the top right corner. Below the header, there are navigation tabs: 'Projects/Activities', 'Funding/Drawdown', 'Grant' (which is highlighted), '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 several menu items: 'Logout', 'Grant' (with a 'Search' link), 'Subfund' (with 'Add' and 'Search' links), 'Subgrant' (with 'Add' and 'Search' links), 'Utilities' (with 'Home', 'Data Downloads', 'Print Page', and 'Help' links), and 'Links' (with 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home' links). The main content area is titled 'Subfund' and contains the text 'Add Subfunds'. Below this is a search criteria form with the following fields: 'Program:' with a dropdown menu set to 'All', 'Fund Type: (tp)' with a dropdown menu set to 'Select', and 'Grant #: (tp)' with a text input field. There is also a 'Grant Year: (tp)' dropdown menu set to 'Select'. At the bottom of the search criteria form are 'Search' and 'Reset' buttons. Below the search criteria form, the text 'There are no results to display.' is visible.

- 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: HOME

Fund Type: (tip) Select

Grant #: (tip)

Grant Year: (tip) Select

|

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)

IDIS version 11.0.1_3981

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

Grant
[Search](#)

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

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

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

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

Subgrant
Add Subgrant

*Indicates Required Field

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

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

Check Balance | Save | Reset

Show Availability

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

- 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_3982" 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 #" field has a placeholder "(ex: 00-000-0000)" and the "EIN/TIN #" field has a placeholder "(ex: 00-0000000)".

On the left side of the interface, there is a sidebar with several sections: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "Logout" link. Below this are sections for "Grant" (with a "Search" link), "Subfund" (with "Add" and "Search" links), "Subgrant" (with "Add" and "Search" links), "Utilities" (with "Home", "Data Downloads", "Print Page", and "Help" links), and "Links" (with "PDF Viewer", "Support", "CPD Home", and "HUD Home" links).

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

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 COPR	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 (tp): HOME | *Grant Year (tp): 2008 | *Grant # (tp): M08MC550204 | *Fund Type (tp): CR

*Subgrant to Organization: ADOPT-A-NEIGHBORHOOD, INC
ADOPT-A-NEIGHBORHOOD, INC, WI
Change Organization

Maximum Subgrant Amount: \$0.00 | *New Subgrant Amount: \$ | *Banking: Yes No

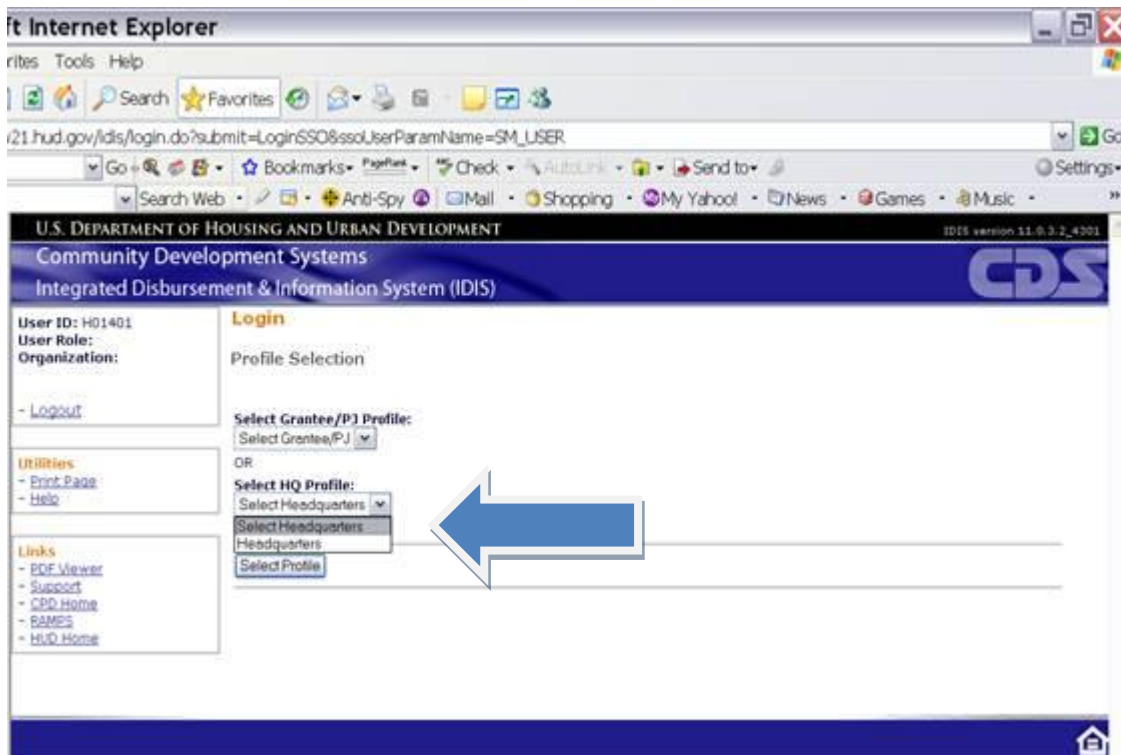
Check Balance | Save | Reset

Show Availability
Program (tp): Select | Grant Year (tp): Select | Grant #: (tp): Select | Fund Type: (tp): Select | Show

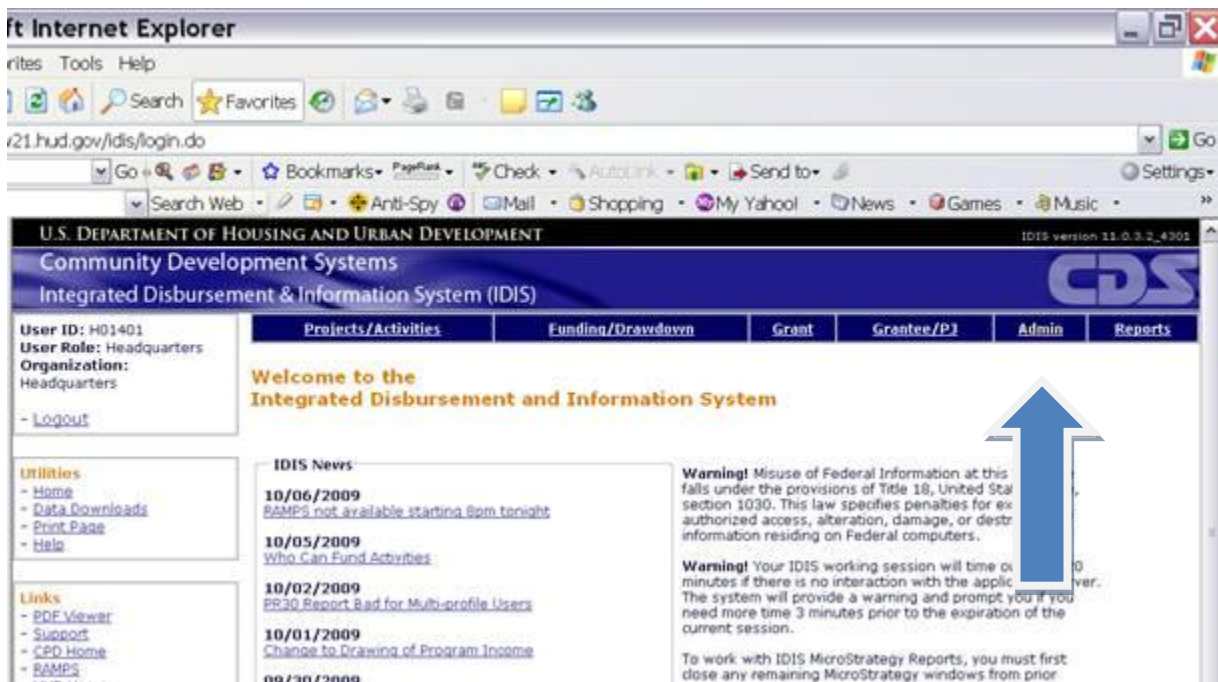
9. Admin Functions

HQ Administrators – editing a users profile

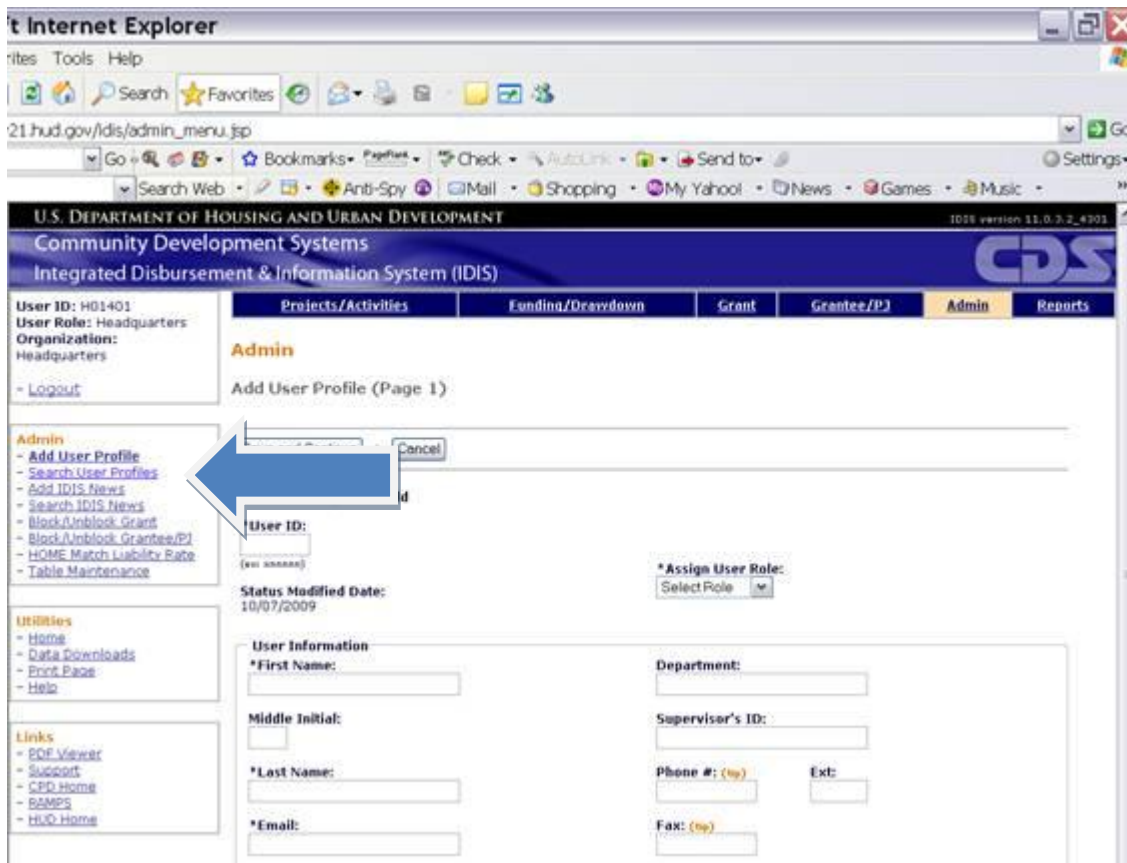
1 when prompted to select a profile select Headquarters



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

The screenshot displays the IDIS OnLine user 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 links for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left, a user profile box shows 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT', with 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. An 'IDIS News' box indicates 'No news to display.' Two warning messages are present: one about federal information misuse and another about session timeout. A note states that MicroStrategy Reports require closing previous windows. 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) **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 vertical panels: 'User Profile' showing 'User ID: C15581', 'User Role: Grantee', and 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT' with 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' panel with links for 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'. The main content area is titled 'User Profile' and 'Search User Profiles'. It contains a 'Search Criteria' form 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 form.

- 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: xnnnnn)

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) 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: xxxxxx)</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 #: (tp) <input type="text"/> Ext: <input type="text"/>
*Email: <input type="text"/>	Fax: (tp) <input type="text"/>

9.2 Grantee - Editing 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. A navigation bar contains several tabs: "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin" (which is highlighted), and "Reports".

On the left side, there is a sidebar with user information and navigation links. The user information includes: "User ID: C15581", "User Role: Grantee", and "Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT". Below this is a "Logout" link. The sidebar also has 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 User Profiles" section. This section contains a "Search Criteria" form with the following fields: "User ID:" (with a text input field), "First Name:" (with a text input field), "Last Name:" (with a text input field), "Select Role:" (with a dropdown menu showing "All"), "Organization name:" (with a text input field), and "Status:" (with a dropdown menu showing "Select Status"). Below the form are "Search" and "Reset" buttons.

- 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)' with the CDS logo. A navigation bar includes 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin' (highlighted), and 'Reports'. The left sidebar contains user information: 'User ID: C15581', 'User Role: Grantee', 'Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT', and a 'Logout' link. Below this are sections for 'Admin' (with links to 'Search User Profiles' and 'Table Maintenance'), 'Utilities' (with links to 'Home', 'Data Downloads', 'Print Page', and 'Help'), and 'Links' (with links to 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'). The main content area is titled 'User Profile' and 'Search User Profiles'. It features a 'Search Criteria' form 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 form.

- 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](#)

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**

 (ex: xxxxxxx), *Status: , Status Modified Date: 06/18/2009, Existing User Roles: [Headquarters](#), [Field Office](#), [Grantee](#), User Information: *First Name: , Middle Initial: , *Last Name: , *Email: , Department: , Supervisor's ID: , Phone #: (tip) Ext: , Fax: (tip) .

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 is a navigation bar with tabs for 'Projects/Activities', 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. The 'Admin' tab is currently selected. On the left, a sidebar contains a 'Logout' link and three sections: '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 'Admin' and 'Edit Grantee/PJ User Profile (Page 4)'. It features three buttons: 'Save', 'Cancel', and 'History'. Below these are the user details:

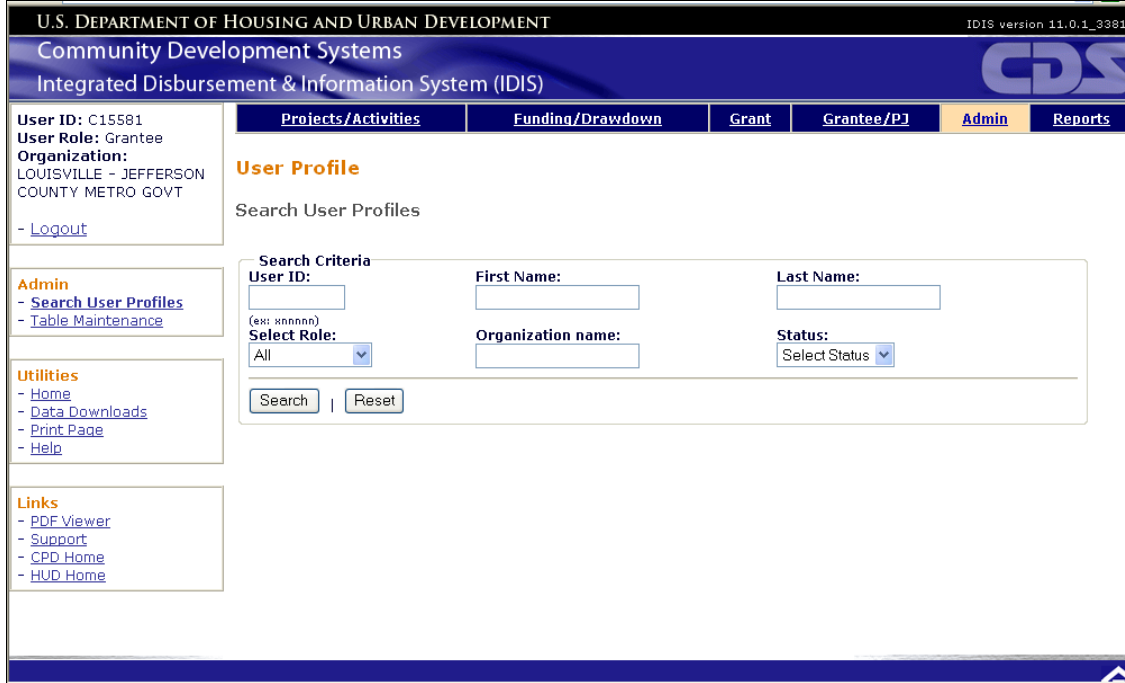
- User ID:** C15581
- Name:** TONY PULLIAM
- Assign User Role:** Grantee
- Status:** Active (dropdown menu)
- Grantee/PJ Name:** VERMONT

There are three privilege sections, each with a list of checkboxes:

- Program Privileges:**
 - CDBG
 - ESG
 - HOME
 - HOPWA
- Administrative Privileges:**
 - Administration
 - Report
 - Table Maintenance
 - Add Subordinate
 - Edit Subordinate
- Activity Privileges:**
 - Set up Activity
 - Update Activity
 - View Activity
- Drawdown Privileges:**
 - Drawdown Approval
 - Request Drawdown
 - View Drawdown

9.3 Grantee - Viewing Existing User Roles

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



- 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](#)

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: All

Organization name:

Status: Select Status

|

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

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

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

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

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

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

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

User Profile
Search User Profiles

Search Criteria

User ID:
 First Name:
 Last Name:
 (ex: xxxxxxxx)
 Organization name:
 Status:
 Select Role:

|

Results Page 1 of 1

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

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](#)

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

Integrated Disbursement & Information System (IDIS)

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

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

User Profile
View User Profile (Page 1)

|

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:

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

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[HUD Home](#)

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)'. A navigation bar contains links for '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 features a 'Welcome to the Integrated Disbursement and Information System' message. Below this, there is an 'IDIS News' section with 'No news to display.' and a 'Warning!' section with text about misuse of federal information and session timeouts. At the bottom, there is 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 a user has logged out. The header and navigation bar are identical to the previous screenshot. On the left, a 'Links' box contains links for 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home'. The main content area features a 'You are not logged in to IDIS' message. Below this, there is a bullet point stating 'You have been logged out from IDIS and your session has been cleared.' and a line of text: 'The IDIS login page will be displayed shortly, or click [here](#) if the page does not refresh.'