

IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

NEW REFERENCE MANUAL NOW EASIER TO DOWNLOAD

As we announced last month, the long-awaited IDIS Reference Manual has been published and is available for viewing and/or printing from the web. The Manual provides a number of enhancements requested by IDIS users. It starts off with a description of the CPD grants management process and how it relates to IDIS. This is followed by detailed step-by-step directions with real examples on how each IDIS option works. Where necessary, the manual offers guidance from the CPD program offices on how to complete a screen.

To assist the grantees with any questions they may have on IDIS, the Field Management Division has mailed a copy of the Manual to each field office. The field offices are utilizing this reference to provide the most up-to-date and comprehensive information available on IDIS. They are also encouraging grantees to print their own copies of the IDIS Reference Manual.

The Manual is found on the web at http://www.hud.gov/cpd/idis/ref_man.html. Many grantees have already accessed the site and have downloaded all or some of the chapters. Be advised that the document is quite comprehensive, approximately 800 pages, and will take quite a while to print. Some users have experienced difficulty when attempting to print the entire manual at one time. For this reason, we have zipped all 15 chapters and appendices into one large file (ref_man.exe) which you can download to your hard drive,

decompress, then print out directly from your PC. We recommend that you create a new folder on your hard drive - "refman", for example - to store the files.

To download the file, first type this URL into your web browser: **ftp.hud.gov/pub/cpd/ref_man.exe**. When you see the pop-up window, select the folder (the previously suggested "refman", for instance) in which you want to save the download. To extract the individual files, double-click on the file refman.exe. This will extract each file for Chapters 1-15 and Appendix A-C into your current folder.

Finally, to view or print each file, double-click on the icon for each chapter. Once the text is displayed, you can print all or part of its contents to your local printer.■

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CDBG FINANCIAL SUMMARY REPORT IN PSEUDO

The Entitlement Communities Division and the Office of Block Grant Assistance have been working diligently with the Office of Information Technology (IT) to develop the CDBG Financial Summary Report. It reports on obligations and expenditures for a specific program year. The Financial Summary Report not only provides information already input in IDIS but also allows for adjustments and for the input of data not available or calculated by the system.

This comprehensive report of expenditures can now be generated in the Pseudo region of IDIS. Guidance for completing the report is on the web at <http://www.hud.gov/cpd/idisweb.html>.

The CDBG program office strongly urges users to go into Pseudo to test it. They eagerly await your feedback because the report will remain in Pseudo until CDBG is confident that it is ready to be moved to Production. Please forward comments to Bob Brever at Robert_T._Brever@hud.gov and Sue Miller at Sue_Miller@hud.gov. Also, copy Tracey Peterson at Tracey_R._Peterson@hud.gov. ■

PSEUDO USAGE STATISTICS

As you know, there have been a great number of upgrades proposed for the system. In fact, just last month there were close to fifty new features, enhancements and corrections added to the Pseudo region for grantee testing. Remember that CPD depends on feedback from the testing to help determine which changes will be released into Production. Here's a look at how busy the Pseudo region was for the week of May 10th.

DATE	# LOGGED IN PSEUDO
5/10	12
5/11	18
5/12	11
5/13	10
5/14	25

The most usage was reported on Friday. However, with approximately 1,000 grantees, we need more of you to go into the region and practice on the data. The region was refreshed with grantees' current Production data on 5/25 through 5/27. So the data available to practice on contains projects and activities from your grants. We need you to go into Pseudo now to let us know what works!

Note: CPD is continuing with its plan to refresh the data in Pseudo on a quarterly basis. The next data refresh is scheduled for August. ■

IDIS EXPERTS IN ATTENDANCE AT THE 1999 BEST PRACTICES SYMPOSIUM

HUD received more than 2,000 Best Practices nominations this year! These nominations demonstrate the results of hard work and innovation used as people developed solutions to housing problems around the country. HUD's 1999 Best Practices and Technical Assistance Symposium, "Building a Better Tomorrow," is the culmination of this hard work.

The symposium will be held in Kansas City, Missouri and will run from July 20th through July 24th. It will provide the opportunity for attendees to learn about the programs developed and to network with others who are also creating the highest quality housing and community development programs in the country. These attendees will include grantees and participants from state and local governments, universities, corporations, community-based nonprofit organizations and other agencies. The highlight of the symposium will be the awarding of the top 100 Blue Ribbon Best Practices Awards.

An on-site help desk run by IDIS experts has been included at the symposium. They will be available for the duration of the meeting, and they will answer questions and help solve problems related to IDIS.

The symposium promises to be highly informative and those in the housing industry are strongly encouraged to attend. For registration information, please contact the Best Practices Symposium toll free at 877-747-3861. ■

LOCAL ADMINISTRATOR TECHNICAL BULLETIN

The information contained in the Local Administrator Technical Bulletin is supplied by our HUD Security Administrator, John Mayer. He can be reached at 202-708-0790, ext. 4866 or emailed at John_Mayer@hud.gov.

ACCESSING NEW FEATURES IN PRE-PRODUCTION

An IDIS contact in one of the HUD field offices asked how to let users back into Pre-Production once their ID is no longer active. John Mayer or Annie Luther get it done through the intervention of ADP Security.

Before we get into the "how," let's get into the "why." When HUD makes changes to IDIS, we try out those changes in Pre-Production first, to allow people to see what new features/reports/etc. are just around the corner. For the field offices, and for others who provide advice and technical assistance, it is the opportunity to learn about new features before they are put into Production. It offers anyone who has kept his/her Pre-Production ID active the chance to gain "advance knowledge" to stay ahead of the curve.

Now here's the "how" part. In the best case, where a person is an active user of Production IDIS, John or Annie only have to ask Security to restore Pre-Production access to that ID. John or Annie would require the person's name and IDIS ID number.

In the worst case, where a person hasn't used IDIS for more than six months, it is more like starting from scratch. John or Annie must have the person's full SSN, any new data about the person including any grantee changes, any access changes needed in IDIS, any new authorizing official, etc. In short, they will need information on anything that has changed since the person was last active. If the person does have such changes, John or Annie **do** want new paperwork.

John Mayer recommends grantees follow the same advice he gives the HUD field offices: instead of having every person at a grantee keep his/her *Pre-Production* ID active by going into Pre-Production at

least once a month, have ONE PERSON at each grantee go into Pre-Production at least once a month. This will keep the conduit open. The person could let his/her colleagues look over his/her shoulder to see the new features that are placed in Pre-Production. This will allow testing of new features, reports and so forth - for example, the Summary of Consolidated Plan Projects Report - before they are placed into Production. This advice is purely for Pre-Production, NOT PRODUCTION. **No one should let anyone else use his/her ID for Production IDIS. ■**

SPRINTLINK IDS AND PASSWORDS

SprintLink IDs and passwords may be obtained from your local Field Office. The following ones were checked out by one of the Field Office Reps as of 5/18/99 and are available for your use.

Sprint ID	Password
CPD.190798.003	170504
CPD.191134.003	102514
CPD.191464.003	170343
CPD.195394.003	117616
CPD.211680.003	101550
CPD.219111.003	144256
CPD.220954.003	161346
CPD.231602.003	161010
CPD.249033.003	136036
CPD.250354.003	125000

Remember, one SprintLink ID and password can be used by many people, even simultaneously. However, **do not** change the passwords. ■

THE NEXT ISSUE OF *IDISLIVE* WILL BE PUBLISHED ON JULY 1, 1999.

IDIS PROFILE: TOM SULLIVAN

How many of you have called into the TAU with a complex problem and been told that it would have to be forwarded to the programmers or the developers for correction? If this has happened to you, you will recognize the name Tom Sullivan. Tom is a high-level IDIS system architect who troubleshoots and fixes these "special" cases. Tom also works closely with the Office of Information Technology (IT). If he finds that a problem concerns the underlying application programs, he forwards it to the programmers in IT for investigation.

As a member of the IDIS team for the past five years, Tom's experience with CPD predates his work on IDIS. Tom effected changes in the old HOME C/MI System and truly believed - along with key HUD CPD personnel - that the grants management function could be modernized. He was one of the key architects of the new system that would integrate the four formula grant programs into a cohesive application - IDIS.

This proved to be a major undertaking but Tom and others were up to the challenge. In 1995, they began work. It included identifying over 7,000 grantee users and subrecipients from CDBG, HOME, HOPWA and ESG. This undertaking, in itself, required approximately a year's effort. Information on each grantee was verified to ensure no duplication among Program Offices. The information was then entered into the database and identifying UOG codes were assigned. And, this was only one of the myriad issues addressed as the development of the business application for grants processing moved forward!

After seemingly endless rounds of meetings and innumerable tests of the system, IDIS was implemented.

Tom continues to support IDIS as the key link between the programmers and the TAU staff. He often confers with the TAU supervisor on those calls that require him to create a SPUI. (A SPUI is a correction that re-synchronizes the data to function within the system.) Information that he provides is shared with other members of the TAU staff, further enhancing their knowledge base in IDIS.

Tom also spends a great deal of time speaking directly with the grantee whose problem call he is working on. "Fifty percent of my cases concern grantees who have not received their money. Their draw has been rejected and they do not know why. Year-end reporting problems are a close second," says Tom. "The bottom line for me is to get the grantees up and running again." To accomplish this, Tom calls many of the grantees to determine the circumstances surrounding the problem and listening to what they are trying to accomplish. "I can then create a SPUI to implement a fund type correction or organize report data in the correct format."

These "one-time" cases require the intervention of someone who understands the system and has the expertise to locate and resolve the problem. Tom accepted the challenge five years ago and continues to meet the challenge today.■

TAU TOTALS FOR APRIL

The TAU fielded 828 calls during the month of April. Eight hundred twenty-five calls were answered by a live customer service representative on the initial call-in. Only three calls went into the voice mail system. Forty-three percent of the calls were questions about the HOME C/MI System and HOPE 3 program; the remaining 57% of the calls were requests for assistance with IDIS.

An interesting note is that Password and SprintLink questions together accounted for 25% of the IDIS-related calls. Remember to contact the User Assistance Branch at 202-708-3300 to have IDIS IDs and passwords reset and contact your local field office to obtain SprintLink IDs and passwords. If further assistance is required, do not hesitate to contact the TAU at 1-800-273-2573.■

IDIS Q&A

CORRECTING VOUCHER SUBMISSION DATES

Q: I accidentally created and approved a drawdown with an incorrect voucher submission date and consequently did not receive funds in my bank account. How can I correct the date in order to receive the funds?

A: This problem cannot be corrected by changing the submission date on the original voucher. You will have to perform three steps: first, you will have to revoke the approval on the original voucher, then cancel the original voucher, then create a new voucher and approve it with a current submission date.

To do this, follow these steps:

1. Go to option D-01 (Drawdown Authorization) from the Main Menu and authorize the correct grantee. Select Option D-06 (Approve Drawdown/Vouchers) from the Drawdown Menu. At the MD12 screen, enter the voucher number. Then, select the voucher to revoke by typing a "K" in the select column. Press **<Enter>**.
2. Next, go to Option 05 (Maintain Drawdown) and on the MD53 screen enter in the voucher number again and press **<Enter>**. You will notice the voucher status has changed to "Open." After you see voucher information displayed, type in a "C" (Cancel) in the select column.
3. Finally, go to Option 04 (Create Drawdowns/Voucher). On the MD10 screen, enter the Activity Number, then proceed to the MD11 screen to enter the amount to draw. Press **<Enter>** to save the amounts. (If you do not press **<Enter>**, the system *will not* save the amounts.) Then, press **<Shift-F8>** to create the voucher. Do not forget to use Option 6 to

approve the drawdown and submit it to LOCCS for payment. ■

WHERE ARE THE ACCOMPLISHMENTS?

Q: I downloaded the Summary of Accomplishments Report for the 1998 program year. Some of the accomplishments for the activities are missing. Where are they?

A: This report only prints accomplishments for the year you requested. If you entered accomplishments for a different year, you will have to rerun the report for that year. (Or, if you forgot to enter accomplishments for the year requested, you will have to go back and enter them using the Revise Activity option.) ■

SETTING UP SPRINTLINK

Q: I just bought a new PC with an internal 56K modem. However, I forgot how to set up SprintLink to connect to IDIS. Can you refresh my memory?

A: You will need to download the SprintLink installation files from the web again (unless you happened to have saved your old set), then run the SprintLink setup. Here are the steps:

1. Download SprintLink 2.0a from the IDIS web at www.hud.gov/cpd/idis/idissoft.html. Save the three files on the hard drive, C:\. Then, proceed to the MS DOS prompt. Have three blank, formatted disks available. At the MS DOS C:\ prompt, type: SprintLink1.EXE (space) and press Enter. Create the second and third disks using SprintLink2.EXE and SprintLink3.EXE until all files are copied onto the disks.

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2. Once the files are copied to the disk, insert Disk 1 of 3 into your 3.5 floppy drive.
 3. From the Start Icon or Windows Program Manager, select Run.
 4. Type the drive letter of your 3.5 floppy drive and the word "SETUP" (for example, "A:\SETUP") then click the <OK> button.
 5. The Custom Setup application screen appears with "C:\SPRNTL2A" in the Install In field and "HUD Consolidated Plan" in the Program Manager Group field. Keep the default settings unless you know they are wrong. Click the Continue button.
 6. When prompted, remove Disk 1 of 3 and insert Disk 2 of 3 into your 3.5 floppy drive then click the <OK> button.
 7. When prompted, remove Disk 2 of 3 and insert Disk 3 of 3 into your 3.5 floppy drive then click the <OK> button.
 8. When the message "Setup is Completed" appears, click the <OK> button. Remove Disk 3 of 3 from your 3.5 floppy drive. Store all of your installation disks in a safe place.
 9. To set up and test the connection, double click on the IDIS SprintLink 2.0a icon in the HUD Consolidated Plan group.
 10. Set up the SprintLink settings (such as dial in number, area code, exchange, response pulse, com port, IRQ, baud rate, parity and stop bits). Select the Production option for the IDIS region field to access the Production version of IDIS.

If you need additional help completing these fields, read the SprintLink set-up document which can be downloaded from the web at <ftp.hud.gov/pub/cpd/sptlk20a.exe>. ■

IDIS WEB SITE IMPROVEMENTS

We previously reported that the IDIS web site is changing to better serve you! Very shortly you will notice an updated subject index which will include articles on HOME, EDI, DGMS and information on what's happening in Pseudo. An improved interface will make that information easier to access.

We are also in the process of changing the format of all issues of *IDIS Live* to PDF. One format will make the issues much easier to download. Currently, the *IDIS Live* issues before number 14 are available in other formats, such as WordPerfect, Word, etc.

Please note the correct address to access the page is <http://www.hud.gov/cpd/idisweb.html>.

If you have suggestions for ways we can make the IDIS Live web site more useful, please e-mail Vera Pérez at Vera_A.Perez@hud.gov. ■

We encourage HUD Field Office staff and entitlement grantees to send in an **IDISLive "Guest Column"** or a **"From The Field"** article to share insight on managing in IDIS. Please contact Vera Pérez by phone at (202) 708-0614 ext. 4786 or by email at Vera_A._Perez@hud.gov.

TRAINING AND TECHNICAL ASSISTANCE

TRAINING SESSIONS SCHEDULED IN WASHINGTON, DC

CPD invites you to join them for a hands-on workshop, "Exploring IDIS". During the week of June 7th, IDIS experts will conduct training for grantees on all four IDIS programs. Each session is designed from the user's perspective to ensure that participants gain the expertise to efficiently and successfully use IDIS to disburse funds, report to HUD and better manage their community development programs and activities.

The workshop consists of the following:

- A discussion of what IDIS is
- How to set up and revise activities
- Committing funds for an activity
- Drawing down funds
- Reporting the receipt of program income and drawing down program income
- Generating reports
- Subgranting and administration funds (for HOME grantees only)
- A discussion of management issues pertaining to IDIS

There are two separate workshops available to grantees depending on what program funds they receive. **Workshop A** is for grantees who only receive funds from CDBG. **Workshop B** is for multi-funded grantees.

TONYA, Inc. is coordinating logistics and registration for the workshops which will be held at the Madison Hotel at 15th & M Streets, NW in Washington, DC. Please contact Natasha Herring or Valerie Feemster at 202-289-8100 for more information.

TONYA, Inc. is also planning to conduct more of the workshops in late June and mid-July. These sessions will also take place in the Washington area. Please call TONYA for details. Remember, sign up is on a first come, first served basis. Don't miss out!■

ON-SITE TRAINING: STATES

CPD is committed to bringing all States "live" in IDIS. As final preparations are made, be sure to contact the training coordinators at TONYA, Inc. to schedule on-site training. Please contact Jon Kunz at 202-289-8100 for more information.■

FOR YOUR INFORMATION

Your IDIS contacts are Tracey Peterson and Vivian Baldwin at CPD. You may contact them via the following:

Telephone: 202-708-0614, ext. 4859 (Tracey)
202-708-0614, ext. 4693 (Vivian)

Internet: Tracey_R._Peterson@hud.gov
Vivian_C._Baldwin@hud.gov

Mail: HUD/CPD
Systems Development and Evaluation Division
451 Seventh St., S.W., Room 7226
Washington, D.C. 20410

For technical information, contact your field office or the CPD Technical Assistance Unit at 1-800-273-2573. **For SprintLink ID and password information**, contact your local HUD field office. **To have your IDIS ID and password reset**, call HUD Security at 202-708-3300. **For IDIS training**, contact TONYA, Inc. at 202-289-8100.