

# IDIS "LIVE"

## News You Can Use . . . for the Integrated Disbursement and Information System

Office of Community Planning and Development U.S. Department of Housing and Urban Development  
Issue No. 3 January 3, 1997

### IDIS Users Ask the Tough Questions

We're on the move now . . . It is not just grantees that are "live" these days; so too is the **IDIS Users Group**. The Group is now in full swing. After meeting for the second time in November, Users Group participants left no stone unturned voicing their IDIS questions and concerns. As with the first meeting, grantees came to Washington, D.C., on November 22, 1996, from all over the country -- from as near as Massachusetts, New York, and Pennsylvania to as far away as Georgia, Illinois, and Arizona. (This month's award for Longest Distance Traveled goes to **Gloria O'Laya**, who flew in all the way from Glendale, Arizona!)

Approximately 30 people attended this meeting to share their experiences, insights, questions, and suggestions for improvements to IDIS with CPD staff, who welcomed the

opportunity to hear their issues first-hand.

With many experienced IDIS users in attendance, there were many tough questions to be answered. And, that is exactly what **Joe Smith**, Director of the Office of Executive Services, hoped would take place. In his morning greeting to the group, he explained how he hoped users would get right to work making IDIS work for them. "We want you to roll up your sleeves and dig in," he said, explaining that any "improvements and enhancements to IDIS will come from you." Smith then reiterated CPD's two-fold commitment to making IDIS as user-friendly as possible, while making each IDIS user proficient with the system. Smith's objective for the day was to convey one thought to grantees on behalf of CPD: "**Our commitment is to you.**"

### Making It Through The "Eye" -D.I.S. of the Storm

It was in October when IDIS made its debut at the annual conference for the National Association of Housing and Redevelopment Officials (NAHRO) held in Orlando, Florida. Weeks ahead, colorful brochures and posters were printed for the event to call attention to the IDIS exhibit space at the conference hall. It was **Lincoln Burruss**, Coordinator for the IDIS Users Group, who was to transport the large, six-foot poster to the conference location from his hotel room, where it had arrived via overnight mail. There were just two problems with this, however: one, the poster would not fit into his rental car for transport; and two,

Burruss was determined, though, to get the IDIS poster to the conference. With the poster loosely strapped to the car's roof, Burruss drove on, steering with his right hand while holding the poster with his left. Through the pouring rain and fierce winds of the storm, Burruss successfully delivered the IDIS poster.

Burruss talks about this experience at IDIS Users Group meetings now, likening it to the experiences of users on their sometimes "stormy" journey of learning a new reporting system. In his trademark sermon-like fashion, Burruss' inspirational words of encouragement in getting through that "storm"

"Hurricane Josephine" was heading straight for Orlando!

called IDIS helped keep users motivated. Through it all, he promises that, "You, too, can make it with IDIS!"

## **We Heard You!**

### **Here Are Changes You Wanted to See Made in IDIS . . .**

While you talked, CPD was listening -- and taking notes! Here is a list of your concerns raised at the second IDIS Users' Group Meeting held last month. Many of these concerns are addressed later in this issue of **IDIS "LIVE"**. Others are currently being worked on as enhancements to the system. CPD's on-going goal is to resolve at least 50 percent of the problems identified at each Users' Group Meeting no later than the date of the next scheduled meeting. In this way, improvements are *always* underway. So far, we are on track.

Priority IDIS Improvements Needed Per Participants at Most Recent IDIS Users' Group Meeting	Under Considerati on	Already Solved or Currently Being Solved	Solution Provided in This Newsletter
■ Splitting contract between two grant years.	√		
■ Making amendments and budget changes easier.	√		
■ Resolving the revolving funds issue.		√	√
■ Approving voucher in total rather than by individual line item.		√	
■ Developing a data dictionary to help users navigate through data downloaded from IDIS.		√	
■ Updating the appendix of the Student Guide with all codes.		√	
■ Resolving issues concerning CDBG revolving loans.		√	√
■ Loading complete CPS and GPR data into IDIS.		√	
■ Alerting users about changes in HOME set up amounts to reflect disbursements made prior to conversion.			√
■ Explaining why a GPR need not be submitted.		√	
■ Instructing how each program should record program income. Also, add narrative field to program income voucher screen.		√	



We know you've got questions about IDIS . . . and, the Users' Group is here to answer them. This "Q & A" column is a regular feature of the **IDIS "LIVE"** newsletter. Your technical questions, such as "How do I ...?" are answered here by CPD technical staff.

If we haven't addressed your question yet, write to us via regular mail, cc:Mail, or on the Internet. See the NewsFlash column on page 12 for contact information. Or, better yet...come to the next scheduled IDIS Users' Group meeting and have your question answered first hand!

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■ ***When reports and amendments reflect incorrect information, what is the procedure for making corrections?***

Your GPR and Consolidated/Action Plan reports and amendments to these reports that have been submitted with incorrect information should be corrected by the grantee or forwarded to your Field Office for correction. The grantee must resubmit the entire report, not just the correction. The Field Office will forward these corrections to Headquarters where they will be entered in IDIS.

■ ***Are activity numbers linked to program income receipts?***

The activity number is not a required field on the Program Income screen in IDIS. You do not have to specify which activity created this income.

■ ***How do you set up administrative funds under the HOME program?***

To set up administrative funds under the HOME Program, the grantee must create a subgrant called "Admin". This can be done by choosing the Subgrant Menu from the Main Menu. Once this is done choose Option "3", Create Admin Funds, to set up an administrative subgrant. This will allow you to input the program, fiscal year,

source type, and the amount of dollars needed to be reserved. You may then set up a HOME activity for administrative funds.

■ ***How do you cancel an activity in IDIS?***

An activity can be cancelled through the Activity Setup Menu. To cancel an activity:

- From the IDIS Main Menu, Select "B" - Revise Activity
- Enter the HUD Activity Number you wish to cancel
- Press "F8" or "Enter" through the common path until you reach the CO4MA04 screen
- Tab to the Activity Status Code Line and type "1" to cancel the activity
- Note in the narrative section the reason for cancelling the activity
- Press "F9" to save

■ ***What is the best way to handle CHDO reserves in IDIS?***

There are two ways to handle CHDO reserves: You may either make the CHDO a project, assign activities to that CHDO, and draw down funds using the "CR" fund type. Or, you may set up the CHDO as a subgrantee (which is the easiest solution).

**Q & A**

**You've Got Questions?  
We've Got Answers...**

# PowerTips

## Step-by-Step "How To" Instructions

The process for reviewing the Consolidated/Action Plan data and uploading to IDIS entails checking HUD data disks for the 20 files that are required by CPDTS and comparing the data on HUD data disks against the hard copies (when available) of the Consolidated/Action Plan. The entire process for preparing disks for uploading, including handling amended disks, is explained below.

### Checking for Missing Data Files

HUD data disks must be comprised of 20 files. These 20 files consist of the following:

County.dbf	Projects.dbf
County.cdx	Projects.cdx
Data_id.dbf	SF424db.dbf
Source.dbf	
SF424db.cdx	
Grafpts.dbf	SF424db.fpt
Invest.dbf	
Shortadr.dbf	
Needs.dbf	
Shortadr.cdx	
Needs.cdx	
Shorterm.dbf	
Newproj.dbf	Shorterm.cdx
Populate.dbf	Shorterm.fpt

If any of these files are absent or corrupted, the HUD data disk cannot be uploaded. A description of the specific problem is put on the problem report and transmitted to Field Office staff and Desk Officers via cc:Mail.

### Reviewing for Data Problems

The HUD data disk is reviewed by Headquarters against the hard copy (when available) of the Consolidated/Action Plan to verify the data. If the data do not match and Headquarters has not been apprised of the receipt of an amendment/revision, it is listed on the CPS/GPR Problem Report for clarification. Whether or not a hard copy of the Consolidated/Action Plan is available, CPD staff reviews the data to determine if there are any irregularities. Headquarters also checks project addresses to ensure that the projects listed on the HUD data disk actually belong to that particular grantee.

### How Amendments are Handled

The amended disks are reviewed for the same problems as the original disks. If there is a problem and it can be resolved with a phone call, Headquarters will contact the Field Office. Otherwise, the problem(s) will be entered in the CPS and GPR Problem Report. If there are no problems, the amendment is usually uploaded on the same day it is reviewed.

### Other Amendment Issues

The following rules should be adhered to when submitting an amendment:

- A proposed project cannot be deleted if any activity setup or drawdown has been made against that project. **If a project is deleted in an amendment, all setup and drawdown information for activities under that project will**

**be lost and irretrievable in IDIS.**

- For individual projects, do not modify the budgeted amount to be lower than the amount of the drawdown made against all the activities.

**Results**

The IDIS Headquarters staff reviews and uploads approximately 50 HUD disks per week. The team performs the entire process on every disk that is received; this includes data for 1995, 1996, and the amendments and/or revisions for each grantee. The processing time for uploading is cut in half when there are 20 files present, and there are no problems with the data.

# PowerTips

## Step-by-Step "How To" Instructions

### Instructions for downloading SprintLink files from the BBS:

1. You will need 4 preformatted, high density disks.
2. From the HUD BBS Main Menu, select "L" - Library of Files.
3. From the Library of Files Menu, select "S" - Select a File Library.
4. Select "C" - Library CPD00002 (CPD LIB Utility/Software area).
5. Select "C" to continue.
6. From the File Library Menu select "F" - List of Files.
7. Select the File List option desired. Then select "C" - Current Libraries (CPD00002).
8. Press CTRL + D to download files. Follow screen instructions for downloading (the ZMODEM option will only work with PROCOMM for Windows).
9. Once the downloading is completed, press "X" and then "C" to return to the Library of Files Menu.
10. Exit the BBS and get to the DOS prompt on your terminal.
11. Insert disk #1 into the disk drive and change directory to that drive.
12. At the DOS prompt, type "SPRINT1 a:" (or "b:"). Files will extract and you will be prompted to insert the next disk. Repeat this step for the first three disk.
13. Insert the 4th disk, type "SPTLK20A a:" (or "b:"). This disk contains the SprintLink Installation/User Guide. Exit DOS and enter Windows.
14. From the Windows Program Manager, select "File" and then select "Run".
15. At the Run menu command line, type "a:\setup.exe" or "b:\setup.exe". The system will prompt you to insert each disk.
16. Use WordPerfect 6.0a to print the SprintLink Installation/User Guide. See the User Guide for instructions on entering SprintLink.

# You Asked For It!

## Specific Requests From the Latest UG Meeting Instructions

R

Several users are having difficulty reporting program income received from revolving loan repayments because the IDIS system does not reserve or apply the funds you report as program income to a specific activity. Until a separate module is developed to address revolving loan fund (RLF) receipts, it is recommended that they be recorded in IDIS when you are ready to draw down the money. It is important to draw down against the activity as soon as you receive the funds.

Receipting revolving loan payments is a two-step process: Your first step will be to create a voucher for all activities that will be funded by the RLF program income. This will ensure that the revolving loan funds you have just receipted in program income will be applied against those activities. Once that voucher has been approved, you will create another voucher for that portion of the activity that will be funded by an entitlement.

- 1 Select option "H" - Program Income Receipts.
- 2 Select option "01" - Create Program Income Receipt. Record the amount of RLF program income

received in the Program Income Amount field as prompted.

- 3 Go back to the IDIS Main Menu (F4).
- 4 Select option "D" - To access the Drawdown menu.
- 5 Select option "01" - Drawdown Authorization.
- 6 Select option "04" - Create Drawdown/Vouchers to create the voucher for the activity. For program income vouchers, use **Fund Type "PI"**. For the entitlement portion, use **Fund Type "EN"**.
- 7 Select option "06" - Approve Drawdowns.

**Example:** You wish to draw \$30,000 to make a new loan under an RLF activity, and you have \$20,000 to record as revolving loan program income to use for the new loan. Record the \$20,000 RLF in the program income module. Then, go to the drawdown menu and obligate the RLF against a specific activity. Remember, the money has never actually gone anywhere - you are

simply using the IDIS system to record your use of the money. To draw the additional \$10,000 from the grant, create another voucher for the balance. The system will check for other program income and then draw from the entitlement money. When finished you will have successfully recorded and drawn down \$20,000 in RLF program income against a specific activity and drawn another \$10,000 in grant funds in support of that same activity as well.

*Please call the Help Desk at 1-800-273-2573 for further assistance.*

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# The F1 Column

## Helpful Hints & Short Cuts To Keep You Moving Along in IDIS

Here are a few "helpful hints" which new users may find will ease their introduction to IDIS . . . .

- **TAB.** IDIS works a little differently than other systems. Don't forget to use the TAB key to move from field to field in IDIS. Also, remember to use this key to move from the "User ID" field to the "password" field when logging on!
- **F1 Help Key.** When accessing IDIS for the first time, users more likely will want to "VIEW" data (option C from the main menu). When going into view mode, use the F1 or F2 keys to pull up a pop-up screen with your community's specific projects. Then, simply flag the project you wish to view with an "X". You may need to press ENTER again to bring up that project's activities once you return from the project help screen to the view screen. Be sure to check the "F" key definitions at the bottom of your screen, as the F1 and F2 keys have been enhanced recently, and their function may be altered slightly.
- **F17 and F18 Keys.** How do I use the F17 "Up" and F18 "Down" keys? Easy! Use your SHIFT+ F7 for Up and SHIFT+F8 for Down. These keys make the screen work like a scroll, moving up and down to view more projects or activities that do not fit on the screen all at once. Please note that some computers work differently. If your screen does not appear to change, use the SHIFT+F5 and SHIFT+F6 instead.
- **Passwords.** Confused about passwords? Don't change them. Your SprintLink ID and password need NEVER be changed! In fact, we recommend that you always keep the original SprintLink password HUD issued you. Your IDIS password will expire and will need to be refreshed every 21 days. We recommend you wait until the system prompts you to change it. The system will give you a special screen with two large arrows on it when the time comes to refresh your password. You need not use the "new password" field. It is especially important NOT to use this field when logging on for the first time. Wait for the system to prompt you.
- **Printing Screens in IDIS.** You need not print screens in IDIS. All the information, once successfully input, is stored in IDIS. Record retrieval is easy. Your activities will always be listed under the project number (unless the project has been deleted--see page 4) under which they were created. Vouchers can be referenced by

activity number, voucher number or date! If you still wish to print screens in IDIS, handy instructions are given in the 2.4 version of the IDIS Student Guide, on page 223.

If you have problems or questions about IDIS, logging-on or changing your passwords, the CPD Hotline (1-800-273-2573) is available from 8 a.m. to 7 p.m. EST to assist you!



Below you will find the names of those IDIS users who are in "live" production, along with their telephone and fax numbers, and when possible, e-mail addresses.

We encourage you to contact each other to share insights and experiences, to problem-solve, and to provide moral support when necessary. It really does get better

when you jump in and . . . just do it!

<i>GRANTEE NAME</i>	<i>GRANTEE CONTACT</i>	<i>TELEPHONE/FAX/E-MAIL</i>
<i>Decatur, AL</i> .....	<i>Mr. Kim Wilder</i> .....	<i>205-351-7754</i>
<i>Dothan, AL*</i> .....	<i>Glenn Franklin</i> .....	<i>334-794-6713</i>
<i>Chandler, AZ*</i> .....	<i>Patrick Tyrrell</i> .....	<i>602-786-2610</i>
<i>Decatur, AL*</i> .....	<i>Mr. Kim Wilder</i> .....	<i>205-351-7754</i>
<i>Mesa, AZ*</i> .....	<i>Kathleen Savagian</i> .....	<i>602-644-2168</i>
<i>Glendale, AZ</i> .....	<i>Gloria O'Laya</i> .....	<i>602-930-3670</i>
<i>San Francisco, CA*</i> .....	<i>Roger Sanders</i> .....	<i>415-252-3157</i>
<i>Seaside, CA*</i> .....	<i>Dante Lacson</i> .....	<i>408-899-6224</i>
<i>Arapahoe County, CO</i> .....	<i>Jim Taylor</i> .....	<i>303-730-3841</i>

Lakewood, CO .....	Linda Wellens .....	303-987-7503
Jefferson County, CO* .....	Sherri Almond .....	303-271-8947
Pueblo, CO .....	Tina Angster .....	719-584-0830
Westminster, CO .....	Ed Powers .....	303-430-2400
Bridgeport, CT* .....	Para Rosario .....	203-576-7134
East Hartford, CT* .....	Mary Martin .....	860-291-7206
Hamden Township, CT* .....	Maryellen Avery .....	203-776-5978
New London, CT* .....	Charlotte Schroeder .....	860-447-5203
Waterbury, CT* .....	Mr. Elio Longo .....	203-757-9621
West Haven, CT* .....	Ralph A. Paolillo .....	203-937-3550
Albany, GA* .....		
Columbus, GA* .....	Greg Clark .....	706-571-4710
Dekalb County, GA* .....		
Macon, GA .....	Roxanne Burnham .....	912-751-7170
Lake County, IL* .....	David Robinson .....	847-360-6372
North Chicago, IL* .....	Steve Marciani .....	847-578-7754
Peoria, IL* .....	Terri Harmons .....	309-494-8562
Waukegan, IL* .....	Noelle Kischer .....	847-360-9000 x 496
East Chicago, IN* .....	Clay Brooks .....	219-397-9974
Evansville, IN .....	Mary Wildeman .....	812-426-5580
		Fax: 812-426-5384
Muncie, IN* .....	Sue Peden .....	317-747-4825
West Lafayette, IN* .....	Charlotte Martin .....	317-775-5160
Covington, KY .....	Joe Crockett .....	606-292-2188
	Tom Waters .....	606-292-2193
Jefferson County, KY .....	William (Bill) Lile .....	502-574-5143
	David Tileston .....	
Lexington-Fayette County, KY .....	Paula King .....	606-258-3070
	Irene Gooding .....	
Louisville, KY .....	Peggy Lucas .....	502-574-3541
	Steve Ward .....	502-574-3542

Barnstable, MA .....	Dave Palmer .....	508-790-6296
Brockton, MA .....	Steve Cruz .....	508-587-6085
.....	Angela Whalen .....	.....
Chicopee, MA* .....	Daniel Zawidowski .....	413-594-4711 x 249
Annapolis, MD .....	Christine Hall .....	410-269-0064
Cumberland, MD .....	Vickie George .....	301-759-6513
Frederick, MD .....	Bill duBell .....	301-694-1443
Hagerstown, MD* .....	Geroge Andreve .....	301-739-8577 x 134
Auburn, ME* .....	Reine Mynahan .....	207-786-2634 x 218
Bangor, ME* .....	Stanley Moses .....	207-945-4400 x 211
Lewiston, ME* .....	James Andrews .....	207-784-2951 x 343
Florissant, MO* .....	Mark Etling .....	314-839-7680
Joplin, MO* .....	Jack Golden .....	816-624-6937
Springfield, MO* .....	Charles Marinec .....	417-864-1097
Dover, NH * .....	Rick Jones .....	603-743-6034
Nashua, NH .....	Gerry Miller .....	603-594-3362
Portsmouth, NH .....	Karen Jacob .....	603-431-2000
Rochester, NH* .....	Brian McMaster .....	603-335-1338
New Brunswick, NJ* .....	Carole Lyons .....	908-745-5121
Monroe County, NY* .....	William Fritsch .....	716-426-2484
Mt. Vernon, NY .....	Dana Sanchez .....	914-699-7230
Chapel Hill, NC* .....	Chris Berndt .....	910-968-2728
Rocky Mount, NC* .....	Marcus Goodson .....	919-972-1101
Salem, OR .....	Maurice Anderson .....	503-588-6173
.....	.....	E-Mail: MAndersonOpen.Org
Bensalem, PA* .....	William (Bill) Cmorey .....	215-633-3600
Berks County, PA .....	Ken Pick .....	610-478-6325
.....	.....	E-Mail: kenpick@postofficeptd.net
Bucks County, PA* .....	Ken Pick .....	610-478-6325

Carlisle, PA .....	Diana White .....	717-249-1315
.....	.....	Fax: 717-249-4071
Chester County, PA .....	Pat Bokovitz .....	610-344-5410
Harrisburg, PA .....	Theresa Martini .....	717-255-6423
Hazleton, PA .....	Annetta Williams .....	717-459-4965
Luzerne County, PA* .....	Cathy Hilsher .....	717-824-7214
Arlington, TX .....	Barbara Van Der Loop .....	817-276-6733
Beaumont, TX .....	John Beatty .....	409-880-3768
Dennison, TX* .....	Tom Speakman .....	903-465-2720
Ft. Worth, TX .....	Bob Carreras .....	817-871-7550
Killeen, TX* .....	Celestina Sierra .....	817-634-2194
Tarrant County, TX .....	Darren Lacey .....	817-338-9129
Kennewick, TX* .....	Barb Carter .....	509-585-4279
Pasco, WA* .....	Jeff Bailie .....	509-545-3441
Richland, WA* .....	Bob Gregory .....	509-943-7585
Eau Claire, WI .....	Lisa Clark .....	715-839-4943
.....	Carole Doyle	
La Crosse, WI .....	John Florine .....	608-789-7512
.....	Gene Pfaff .....	608-789-7567
Milwaukee, WI .....	Fran Aring .....	414-286-2337
.....	Nick Loth .....	414-286-2309
Milwaukee County, WI .....	Gary Bottoni .....	414-278-4880
.....	Don Lybeck .....	414-278-5254
Racine, WI .....	Richard A. Linsmeier .....	414-636-9151
.....	Terry Maier .....	608-636-9406
Wauwatosa, WI .....	Greg Laabs .....	414-479-8957
.....	Gordon Rosmus	

\*Live as of November 8, 1996

# NewsFlash

## Upcoming News Items & Events

- The next IDIS Users' Group Meeting is scheduled for Monday, January 13, 1997 from 8:30 a.m. to 5:00 p.m. at the old T & P Railroad Building, 1600 Throckmorton, Ft. Worth, TX on the 6th floor. You may contact Lincoln Burruss on (202) 708-0790, x 4570, if you would like to attend.

### Future IDIS Users' Group Meetings:

February 21, 1997 - Denver, CO  
March 21, 1997 - Philadelphia, PA  
April 18, 1997 - Chicago, IL  
June 20, 1997 - Mt. Vernon, NY

- The IDIS Users' Group is moving to the Internet in 1997! The new Web page will offer links to much of the information currently accessible on CPD's Bulletin Board System (BBS). Planned components for the Web page include : an IDIS calendar of events and planned software releases, an IDIS comments/suggestions form, a list of IDIS Frequently-Asked Questions (FAQs), IDIS "LIVE", the IDIS Users' Guide and Student Training Guide, and a host of other IDIS-related information. If you have any questions or suggestions about the IDIS Users' Group Web Page, you may contact William Johnson at (202) 708-0614, x4356 or e-mail him at [William\\_P.\\_Johnson@hud.gov](mailto:William_P._Johnson@hud.gov).
- IDIS Files Now Available. In addition to the User Group Web page, efforts are currently underway to make important IDIS files available for downloading via HUD's FTP site on the Internet. This site is located at "<ftp://ftp.hud.gov/pub/cpd/>". If you need assistance in accessing this

site, contact William Johnson at the address or phone number listed above.

- Important: User Alert! Recently every Field Office was sent a set of instructions that may have caused some confusion. This set of instructions advised grantees to update their IDIS data and bring all open activities to current financial status.

However, these instructions were meant to apply only to CDBG, ESG, AND HOPWA, not HOME. For HOME participating jurisdictions (PJs), no adjustments should be made in the set up amounts to reflect disbursements made prior to conversion.

Activity level data for HOME PJs converted to IDIS prior to December 6, 1996 do not include disbursements made through the HOME C/MIS. (Total disbursements against the total grant, however, are reflected.) HOME PJs converted prior to December 6, 1996 should check prior disbursements to avoid an overdraw for a particular activity. An adjustment to data in IDIS reflecting disbursements at the activity level prior to conversion will be made shortly. For HOME PJs converted after December 6, 1996, disbursements made through the HOME C/MIS will be reflected at the activity level.

If you have adjusted set-up amounts to reflect prior disbursements please inform Lincoln Burruss on (202) 708-0790 x 4570 or cc:Mail [Lincoln\\_Burruss@hud.gov](mailto:Lincoln_Burruss@hud.gov) by COB

**Monday, January 13, 1997.**

**For More IDIS Information . . .**

- **Your IDIS Users' Group contact person is Lincoln Burruss, at CPD. You may contact him via the following:**

**Telephone: 202-708-0790, x4570**

**Internet: lincoln\_burruss@hud.gov**

**Mail: HUD/CPD,  
Office of Executive Services  
451 Seventh Street, SW, Rm**

**7226**

**Washington, D.C. 20410**

■ **For technical information, contact the IDIS Hotline at 1-800-273-2573.**

- **For ID and Password information, contact your local HUD Field Office.**