

# **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  
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### **Users are Making the Connection**

**Kudos to Liz Herron and Katie Worsham for hosting the third IDIS Users Group Meeting on January 13, 1997, in Ft. Worth, Texas. In spite of the unseasonably cold Texas weather, grantees came from as near as Kansas to as far away as Georgia and Illinois to share their IDIS experiences. (This month's award for Longest Distance Traveled goes to Michael J. McAtee who flew in all the way from St. Louis).**

**"Subgranting" was the focus of this month's Users Group discussion (see PowerTips on page 5 for more on this subject). There was a common concern from some of the grantees that they were not using the module efficiently. An explanation of the best way to allocate administrative funds and an easier method to input multiple subgrants, were of particular interest to those in attendance. Others in the group wanted to learn more about short-cuts and other time-saving features of the module. Many grantees were not aware that their subgrant data is converted from CPS in the system. (This information is available for viewing on the day the grantee goes "live" in IDIS). CPD staff were available to answer their questions and to provide step-by-step instructions through the process. Most**

**grantees left the session with a better understanding and willingness to tackle the module.**

**As always, the "Best Practices" discussion provided a lively exchange among the grantees and CPD staff. Grantees bombarded staff with suggestions for system enhancements from which concrete solutions were derived. Some of the grantees concerns were not easy to respond to quickly, i.e., "Why doesn't the system save when I press Enter?" or "Why doesn't the system allow unlimited view capability in all the modules?" Other questions were less difficult to address. For instance, some of the grantees wanted to know how they could print IDIS reports on standard 8 1/2 x 11 paper. Dave Robinson, from Lake County, IL, had a solution. On his own, he had developed a template in WordPerfect that formats reports on standard paper, and he shared that template with IDIS users (see the F1 Column on page 6). Dave's resolution of the paper dilemma is a perfect example of what can be achieved when we roll up our sleeves and work together.**

**In the end, it was clear that this Users**

**Group Meeting helped the participants become more comfortable with the system. Some even commented on the ease of the drawdown process, the reduction in paper, and the cheaper long distance phone bills (LOCCS does not have a toll-free number) as noticeable advantages of using IDIS. Sharing information and helping each other benefit from the system is all a part of Users making the connection.**

# *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 most recent IDIS Users Group Meeting. 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 Improvement at Most Recent IDIS Users Group Meeting	Under Consideration	Already Solved or Currently Being Solved	Worked on and Scheduled in Next Letter	Solution Provided in This News Letter
- Formatting reports on 8.5 x 11 paper.		x			x
- Developing a database for data extractions.			x		
- Authorizing unlimited view capability in all modules.			x		
- Redesigning the report print menu to sort data fields by different categories.		x			
- Reducing the number of screens in the HOME set-up path.		x			
- Developing a help screen to define categories and calculations.		x			x
- Explaining system delays.			x		
- Developing one comprehensive User Manual.			x		
- Saving data using Enter instead of F9.			x		
- Creating an F1 option that will list all subgrants in the Subgrant screen.			x		
- Developing a system for archiving IDIS data.		x			
- Eliminating the need to rekey grantee information that has previously been recorded.		x			
- Converting more data from CPS into IDIS.			x		
- Adding ADMIN/CHDO to options "03" and "04" in the Subgrant Menu.			x		



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 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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***Q. What is the difference between the IDIS Users Manual and the IDIS Student Guide ?***

**A.** The IDIS Users Manual was developed as a technical reference document for programmers and information systems professionals to provide detailed specifications about the software, as well as to provide instructions for troubleshooting problems. The IDIS Student Guide was developed as a training tool for the system and is more user-friendly than the IDIS Users Manual. Grantees should use the Student Guide as a quick reference manual while they are working on the system. By the way, did you know that CPD publishes updates of the Student Guide ? These updates may be downloaded from the HUD BBS.

***Q. Can a drawdown be revised more than once?***

**A.** Yes, the system will allow for a voucher to be revised many times. A drawdown can be revised only after the batch transaction has occurred and LOCCS has approved the drawdown. Only vouchers with a "**Completed**" or "**Open**" voucher status can be revised.

***Q. How do I view drawdown activity ?***

**A.** The instructions to view drawdown activity are as follows:

- From the IDIS Main Menu, Select "D" - Drawdown Menu.
- Select "01" - Drawdown Authorization.
- Select "02" - View Grant Authorization or Details.
- Input the Program Code and Fiscal Year in the optional fields to narrow the search or press "Enter" to display a list of all grants.
- Place an "X" to the left of the desired grant number(s) and press "Enter" to view the grant details.

***Q. How do I delete a report that I have downloaded ?***

**A.** IDIS reports may be deleted in WordPerfect. To delete reports in WordPerfect 6.0:

- Select **File** then **Open** to access the Open File Menu box.
- Highlight the report file to be deleted. IDIS reports will be listed in WordPerfect as: **actvty.rpt;** **fege.rpt;** **grtdraw.rpt;** and **sumactvt.rpt.**
- Click on the **File Options** button located to the right of the Open File Menu box. Select **Delete** and press **Enter** to delete the desired report.

***Q. I am a grantee in pre-production scheduled to view data. Where do I view my information, and how do I correct incorrect information?***

**Q & A**

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

**A.** The instructions to view data are as follows:

- From the IDIS Main Menu, Select "C" - View Activity.
- At the CPS Project Number prompt, Press "F2" - Project Information.
- Place an "X" to the left of the desired project name and press "Enter".
- Press "F5" - Project Information to view the project data.
- Press "F7" to return to the View Activity Screen or press "F4" to return to the Main Menu.

After you review the data contact your Field Office Representative to report any problems.

## ***Downloading and Printing Reports***

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

#### **Report Download Instructions for Field Offices :**

A Field Office must download all reports in IDIS into WordPerfect. A copy of the *IDISDNLD.BAT* data file and membership in the TCP/IP (Transmission Control Protocol/ Internet Protocol) Group is required for the Field Office to download reports. Contact your technical support person for assistance with the TCP/IP Group or Tracey Peterson on the CPD Hotline if you need assistance accessing the *IDISDNLD.BAT* files.

1. From the IDIS Main Menu, select option "E" - Reports Menu. Then select "01" - Report Selection.
2. Place an "X" to the left of the desired report. Indicate the report delivery priority by typing an "I" for immediate or "N" for night delivery. Press "Enter" to save your information. Press "F7" to go back to the Reports Menu.

3. At the Reports Menu, Select "02" - Report Status. Press "Enter" to change the status from "Not Ready" to "Ready" for the selected report. In the activity column, place a "D" to download the report to your PC and press "Enter". You may select multiple reports to download. Do not exit this menu until the status line reads "Wait".
4. Exit from IDIS and go to the MS-DOS prompt.
5. At the MS- DOS prompt type:  
  
IDISDNLD [ your IDIS User ID] [your IDIS password] and [R] to print grantee reports that are in pre-production or [P] to print grantee reports that are in the production region.

**Example: G:\ddd\IDISDNLD C07032 Testing R.**

6. Exit from MS-DOS and go to WordPerfect to print the reports.

#### **Report Download Instruction for Grantees :**

1. From the IDIS Main Menu, select option "E" - Reports Menu . Then select "01" - Report Selection.
2. Place an "X" to the left of the desired report. Indicate the report delivery priority by typing

an "I" for immediate or "N" for night delivery.  
Press "Enter" to save your information. Press  
"F7" to go back to the Reports Menu.

3. At the Reports Menu, Select "02" - Report Status. Press "Enter" to change the status from "Not Ready" to "Ready" for the selected report. In the activity column, place a "D" to download the report to your PC and press "Enter". You may select multiple reports to download. Do not exit this menu until the status line reads "Wait".
4. Exit from IDIS and go to WordPerfect to print the report.

### **Report Printing in WordPerfect :**

WordPerfect version 6.0 or greater is required to print reports. The instructions to print are as follows:

1. In WordPerfect, select "File" then select "Open" to access the Open File Menu box .
2. Highlight the report file to be printed. Reports will be listed in WordPerfect as followed:  
**actvty.rpt;fegf.rpt; gtdraw.rpt; or  
sumactvt.rpt**
3. Click on the "File Options" button located to the left of the Open File Menu box.  
Select "Print" and press "Enter".

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Read the **FI Column** on page 6 for instructions on formatting reports.



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The Subgrant Menu (Option "G" from the IDIS Main Menu) should be used by the grantee to allocate entitlement funds to other

organizations. Following are some tips that may help make this module easier to understand:

### **Creating a Subgrant (selection "01"):**

1. Drawdown authorization is necessary to create a subgrant in IDIS.
2. The UOG code and number of the subgrant are required input fields in this module.
3. Subgrant data is converted from CPS to IDIS. Review this data before creating a new subgrant.

### **Maintaining a Subgrant (selection "02"):**

1. **Viewing a Subgrant.** To view a subgrant UOG code, program code, fiscal year, source type, and allocation amount, place an "X" in the **SEL** column of the C04MG02 screen and press **Enter**.
2. **Canceling a Subgrant.** A subgrant can not be cancelled if a drawdown (actual or pending) has been applied against the subgrant. To cancel a subgrant, place a "C" in the **SEL** column of the C04MG02 and press **Enter**. The system will prompt you to press **Enter** again to confirm the cancellation. If a subgrant is cancelled in error recreate it in the **Create Subgrant** menu.
3. **Revising a Subgrant.** The revise subgrant function will only revise a subgrant allocation amount. A subgrant can be revised many times as long as there are available funds. Place a "R" in the **SEL** column of the C04MG02 screen and press **Enter**. Input the new **Suballocation Amount** and press **Enter** to confirm the change.

If it becomes necessary to make changes to a subgrant name, program code, UOG code or UOG number, **Cancel** that subgrant and re-key the correct information through the **Create Subgrant** screen.

### **Creating Admin Funds (selection "03"):**

1. Use this menu to create and track multiple fund types under the same grant (sub-funding). The current fund types are Entitlement (EN), Admin (AD), CHDO Operating Costs (CO), and CHDO Capacity

Building (CC).

2. Administrative "caps" are calculated and will alert the user if the amount requested exceeds the budgeted amount.
3. HOME grantees must use this menu to subgrant to Other Entities and CHDOs.

### **Maintain Admin Funds (selection "04"):**

1. **Viewing an ADMIN Allocation.** To view an ADMIN allocation, program, fiscal year, source type, and suballocated amount, place an "X" in the **SEL** column of the C04MG03 screen and press **Enter**.
2. **Canceling an ADMIN Allocation.** A subfund can not be cancelled if a drawdown (actual or pending) has been applied against the subgrant. To cancel a subfund, place a "C" in the **SEL** column of the C04MG03 and press **Enter**. The system will prompt you to press **Enter** again to confirm the cancellation.
3. **Revising an ADMIN Allocation.** The revise function only changes the suballocation amount. Any new amount entered replaces the authorized (old) amount. A subfund allocation can be revised many times as long as there are available funds. Place a "R" in the **SEL** column of the C04MG03 screen and press **Enter**. Input the new **Suballocation Amount** and press **Enter** to confirm the change.

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***A detailed set of instructions on Subgranting is available in Section 14 of the IDIS Student Guide.***



# The F1 Column

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

Here are a few "helpful hints" which new users may

ease their introduction to IDIS . . . .

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The F1 column for this month is courtesy of Dave Robinson, Lake County, IL. He has developed a template in WordPerfect that will format IDIS reports for 8 1/2 x 11 paper. For those of you who do not have time to create the template, Dave has placed a copy of it on the HUD BBS Library of Files. Feel free to download REPORT6A.WPT to your WP template directory.

### Instructions for creating a template in WordPerfect 6.0:

1. From the WordPerfect Menu Bar, select *Layout, Page, then Paper Size*. In the Paper Definition menu box, select *letter landscape* and press *Enter* to return to the text screen.
2. From the WordPerfect Menu Bar, select *Layout then Margins*. Set the left margin and the right margin as small as possible (that will depend on the printer you are using, but it will probably be between .250 inches for the left margin and .167 inches for the right margin). Set the top margin to .500 inches and the bottom margin to .400 inches (you may have to adjust these settings to force the IDIS Header to always start at the top of the page). Press *Enter* to return

to the text screen.

3. From the WordPerfect Menu Bar, select *Layout then Font*. In the Font Face Menu Box change the font to *Courier* and change the font size to 10. Press *Enter* to return to the text screen.
4. From the WordPerfect Menu Bar select *File then Save* to save this file as a template.
5. From the Save Menu Box, double click on *Template Directory* in the Quick List Menu Box and name the file using a .wpt extension. (eg. IDISRPT.wpt)

Now that you have created a template in WordPerfect you will be able to use this preformatted file to print any IDIS reports in 8 1/2 x 11.

### Instructions for printing IDIS reports using the template:

1. Download a report from IDIS and exit the system then go to WordPerfect to print the download report .

2. From the WordPerfect Menu Bar, select File then Template. Highlight the IDIS report template previously created in steps 1-5 above and press Enter.
3. From the WordPerfect Menu Bar, select Insert then File. Highlight the IDIS report that you would like to print and press Enter. Reports will be listed in WordPerfect as followed:  
**actvty.rpt; fegf.rpt; gtdraw.rpt; or sumactvt.rpt**
4. From the WordPerfect Menu Bar, select Print to print the Report.

If you would like to reach Dave to thank him, post a message on the CPD\_IDIS forum located on the HUD BBS or send Dave an e-mail at [drobinson@co.lake.il.us](mailto:drobinson@co.lake.il.us).



Below you will find the names of those new IDIS users

*"live" production as of January 10, 1997, 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!*

GRANTEE NAME	GRANTEE CONTACT	TELEPHONE/FAX/E-MAIL
Florence, AL .....	Mary Allison .....	205-760-6467
Fontana, CA.....	Gregory C. Devereaux.....	909-350-7654
Gwinnett County, GA .....	Linda Wellens.....	303-987-7503

Honolulu, HI .....	Jean Tanji .....	808-523-4375
Lake County, IL .....	David Robinson .....	847-360-6372
Arlington, MA .....	Claire Hurley .....	617-646-1000 x 4145
Northampton, MA .....	Penelope G. Kim .....	413-586-6950
Plymouth, MN .....	Ed Goldsmith .....	612-509-5412
Rochester, MN .....	Theresa Fogerty .....	507-281-7389
Lee's Summit, MO .....	Shelley Temple-Kneuvan .....	816-251-2354
Biloxi, MS .....	Babs Richardson .....	601-435-6280
Goldsboro, NC .....	Charlene Willingham .....	919-580-4317
Salisbury, NC .....	Gayle Peeler .....	704-638-5241
Asbury Park, NJ .....	Brenda J. Moore .....	908-502-5730
Bridgeton, NJ .....	Pam Griner .....	609-455-3230 x 1217
Morris County, NJ .....	Sheryl Bartow .....	201-285-6033
Union Township, NJ .....	Carol Hertweck-Lowy .....	908-688-2828
Colonie, NY .....	Nancy J. Andriano .....	518-783-2718
Rochester, NY .....	Joe Mustico .....	716-428-6552
Warren, OH .....	Mark Perez .....	330-841-2595
York County, PA .....	M Christopher Rafferty .....	717-771-9870
Fajardo, PR .....	Luis A. Morales .....	787-860-6075
Manati, PR .....	Milagros Murphy .....	787-854-4942
Rapid City, SD .....	Bonnie Hughes .....	
Brownsville, TX .....	Ben Medina .....	210-548-6150
San Benito, TX .....	Gabriel Gonzales .....	210-361-3835
Fredericksburg, VA .....	Wendy Kimball .....	504-585-4279
Kennewick, WA .....	Barb Carter .....	509-585-4279
Casper, WY .....	Doris McCormack .....	307-235-8243

# NewsFlash

## Upcoming News Items & Events

- \* *The next IDIS Users Group Meeting is scheduled for Friday, February 21, 1997 from 8:30 a.m. to 4:00 p.m. in the Executive Tower Inn, Forum Room, located on 1405 Curtis Street in Denver, CO. The topic of this month's discussion will be "End of the Year Reporting in IDIS". You may contact Dawn Dickerson on (202) 708-0614, x 4410, if you would like to attend.*

*Future IDIS Users Group Meetings:  
March 21, 1997 - Philadelphia, PA  
April 18, 1997 - Chicago, IL  
June 20, 1997 - Mt. Vernon, NY*

- \* *IDIS Version 2.9. The latest version of IDIS 2.9 became available for use on Monday, December 23, 1996. The following software enhancements and/or problem fixes have been included in the production release.*

- 1) *HOME View Screens.*
  - a. *Screens C04MH58 and C04MH59 were fixed to resolve a SQL error message being displayed.*
  - b. *Screen C04MH62 was fixed to resolve a screen/map display problem.*
- 2) *IDIS View Screens. The following view screens were updated to reflect consistency with the corresponding activity setup screen:*
  - a. *C04PA53*
  - b. *C04PA54*
  - c. *C04PH52*
  - d. *C04PH53*
- 3) *HOPWA View Screens. The reported problem with HOPWA view screen C04MP61 receiving an erroneous "ERR012" message has been fixed.*
- 4) *Year 2000 Compliance. The date fields in screen C04PD53, C04PD12, C04PA10, and C04PA11 have been increased to handle a four character*

*year (two more to include century).*

- \* *Sprint Password Error. It is imperative that grantees NEVER change the Sprint password. There is a preset amount of Sprint passwords that are shared by IDIS Users across the country. When someone changes the Sprint password, IDIS Users attempting to access SprintLink will get the "Invalid SprintLink ID or Password" error message.*

- \* *IDIS Users Alert. Please be aware that incorrect census tract data entered in the CDBG path screen (C04MX03) cannot be deleted or revised in IDIS.*

### 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.*