



Chapter 3: IDIS Set-Up and Operation

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3.1.1 Overview

Chapter 3 describes the hardware and software requirements you need to run IDIS and how to get an ID and logon to the system. It also describes how to navigate the system after logon.

This chapter is particularly important if you are a first-time user of IDIS.

3.2 Operating Requirements

3.2.1 Hardware and Software

IDIS is a mainframe-based application that runs on a HUD host computer in Lanham, Maryland. Users connect to IDIS via the Internet.

IDIS Software and Hardware Requirements

IDIS Hardware Requirements	<p>PC Processor</p> <ul style="list-style-type: none"> • IBM-compatible 486 PC or greater, with at least 16 megabytes (MB) of random-access memory (RAM) • At least 210 megabyte hard disk drive <p>Internet Connection</p> <ul style="list-style-type: none"> • Your PC must have a connection to the Internet. This may be a direct connection via a network; or a dial-up connection using a modem in conjunction with an Internet Service Provider (ISP)
IDIS Software Requirements	<ul style="list-style-type: none"> • Windows 95 or higher Operating System • Netscape 4.05 or higher • Web390 plug-in • Report batch file (if you will be downloading reports)

3.2.2 What You Need To Access IDIS Over the Internet

Follow these four steps to assure you have access to IDIS via the Internet:

Step 1	<p>You must have the Netscape Navigator version 4.05 or higher browser installed on your PC.</p> <p>To read a step-by-step guide to downloading and installing Netscape Navigator, go to www.hud.gov/cpd/idis/toolbox/navigatorguide.pdf</p> <p>To download the latest browser, go to Netscape's web site: www.netscape.com/computing/download</p>
Step 2	<p>You must have the Web390 plug-in for the Netscape Navigator browser installed on your PC.</p> <p>To read a step-by-step guide to downloading and installing the web390 plug-in, go to www.hud.gov/cpd/idis/toolbox/web390plugginguide.pdf</p> <p>To download the plug-in, go to: www.hud.gov/cpd/idis/toolbox/np3270.exe</p>
Step 3	<p>To download reports you must have the ftp.zip reports batch file.</p> <p>To read a step-by-step guide to downloading and installing the ftp.zip batch file, go to www.hud.gov/cpd/idis/toolbox/reportbatchguide.pdf</p> <p>To download the batch file, go to: www.hud.gov/cpd/idis/toolbox/ftpzip.exe</p>
Step 4	<p>If you are connected to the Internet through a LAN with a firewall, you may need to have your LAN administrator open a port to allow secure traffic back and forth to IDIS. Read this document for more information www.hud.gov/cpd/idis/techinfo/openports.html</p> <p>For a step-by-step guide to logging on to IDIS via the Internet, go to: www.hud.gov/cpd/idis/toolbox/idislogon.pdf</p>

3.3 Gaining Access to IDIS

To gain access to IDIS, you must obtain both Web390 *and* IDIS User IDs and passwords as described below.

Obtaining IDs and Passwords

<p>Web390 ID and Password</p>	<p>1. All users with active IDIS User IDs have been assigned a Web390 ID. To learn your Web390 ID and password, contact your local HUD CPD Field Office or the TAU.</p> <p>If you do not have an active IDIS User ID, you will be assigned a Web390 ID in conjunction with your application for an IDIS User ID (see next paragraph).</p>
<p>IDIS User ID and Password</p>	<p>To obtain an IDIS User ID and password:</p> <ol style="list-style-type: none"> 1. Obtain an "IDIS Access Request" form from Appendix C of this <i>Manual</i>, your local HUD CPD Field Office, or the HUD Technical Assistance Unit. 2. Fully complete the form and have the IDIS user and your Chief Executive Officer or designated representative sign it. 3. Send the notarized original to your Field Office for review and signoff.

3.3.1 Learning More About Your IDIS User ID and Password

Your IDIS User ID is yours alone.

It uniquely identifies you in the system and gives you special rights that have been tailored to just *your* needs. IDIS User IDs are always six characters, with the first character a “C” and the second character the number “0” or “1.”

IDIS User ID Example

C05554	6 alpha-numeric characters	2nd character is zero, not the letter O
C15554	6 alpha-numeric characters	2nd character is 1, not the letter l

Your IDIS password should be between six and eight characters and may be a combination of letter and numbers. If you type your IDIS password incorrectly *three times in a row*, you will temporarily lose your IDIS access and will be locked out of the system. If this occurs, you must call the HUD User Assistance Branch to regain access.

You should keep your IDIS password confidential and never share it with others. It will automatically expire and you will have to change it every 21 days. If you log on after 21 days has elapsed, the system prompts you to change your password. The system remembers your previous three passwords, so you need at least four passwords for on-going use of the system.



IDIS PASSWORD OR USER ID PROBLEMS?

If your IDIS password has expired, contact HUD User Assistance Branch at 1-202-708-3300, option 3. (The TAU cannot reset your password!)

If you have problems with a new IDIS User ID, contact the HUD IDIS System Administrator at 1-202-708-0614, x4404.

3.3.2 Why Your IDIS ID Might Not Work?

Since IDIS supports the disbursement, tracking and control of \$15 billion of formula grant program funds annually, security precautions are a high priority.

If you do not log on to IDIS for 45 days, the HUD User Assistance Branch (UAB) will automatically suspend your User ID. This practice enables the User Assistance Branch to better control access to the system. It can help prevent IDs from falling into the wrong hands and eliminate the maintenance of IDs for people who have moved on to other jobs.

If your ID is suspended, please call the HUD User Assistance Branch at 1-202- 708-3300, option #3.

Your User ID will expire if you do not log in within six months. You will need to reapply for a new one if this happens.

3.4 Logging on To IDIS

To log in to IDIS, you first start and log in to the Web390 Internet application – using your Netscape browser - and then to IDIS.

3.4.1 Logging on To Web390

Logging on to Web390 is a two step process:

<p>Step 1</p>	<p>Start Netscape and go to the web page: www.hud.gov/cpd/idis/idis.html Click on the region where you reside.</p>
<p>Step 2</p>	<p>For Username, enter the Web390 “wi” ID you were assigned and your password in all lower-case. (Your password is the first letter of your first name, the first letter of your last name, and the last four digits of your Social Security Number.) Click <OK>.</p>

3.4.2 Logging on To ISIS from the Signon Screen

Follow These Steps To Log on To ISIS:

Step 1	From the HUD "House" screen, click on the grey "Logon" button to see to the ISIS Signon Screen.
Step 2	Type your ISIS User ID.
Step 3	<Tab> to the Password field and type in your password.
Step 4	Leave the GroupID and Language fields blank. Press <Enter> only after you have entered both your User ID and Password.
Step 5	Press <Enter> again to view the Main Menu.

SCREEN: IDIS Signon Screen

C04P

PURPOSE: Allows you to log on to IDIS.

APPLID C04P
C04PCICS - C04 IDIS PRODUCTION - CICS/ESA
Type your userid and password, then press ENTER:
Userid _____ Groupid _____ Password _____ Language _____ New Password _____

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Userid	✓	Type your IDIS User ID and press <Tab> twice to go to the Password field. (Your User ID will start with a "C0" or "C1" prefix.)	6 alphanumeric characters
Groupid		Field Not Used	Field Not Used
Password	✓	Type your IDIS password and press <Enter>.	8 alphanumeric characters
Language		Field Not Used	Field Not Used
New Password		Type your new password when prompted by the system every 21 calendar days.	8 alphanumeric characters

3.4.3 Selecting an Option from the IDIS Main Menu

From the IDIS Main Menu you can select up to 12 different options (depending upon your system access rights). You use these menu options to tell IDIS what you want to do, for example to:

- Enter a processing path, such as activity set-up, drawdown funds, etc.
- Perform discrete functions, such as generate reports or record program income.

The screen and table on the next two pages describes the 12 Main Menu options.

If you need to change which options are available to you, you should contact your Grantee Local Administrator.

SCREEN: IDIS Main Menu

PURPOSE: This screen lets you navigate through the 12 options that direct you to work flow paths, discrete functions, or sub-menus. You will see all 12 options from the Main Menu. However, the options you can use depend on your system access rights, which were established for you by your Grantee Local Administrator.

```

09/14/00      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM  C04MM01
14:55:35

                MAIN MENU

                A  SET UP ACTIVITY
                B  REVISE ACTIVITY
                C  VIEW ACTIVITY
                D  DRAWDOWN MENU
                E  REPORTS MENU
                F  UTILITIES MENU
                G  SUBGRANT MENU
                H  RECEIPTS MENU
                I  ACTIVITY FUNDING MENU
                J  PLAN/PROJECT MENU
                K  GO TO MENU
                L  IDIS NEWS MENU
                X  EXIT IDIS

TYPE SELECTION AND PRESS ENTER      00
    
```

IDIS Main Menu Options:

A Set Up Activity	Establishes an activity in IDIS for the first time.
B Revise Activity	Revises an activity that was previously set up in IDIS.
C View Activity	Lets you view details of an activity but not update or delete any information.
D Drawdown Menu	Lets you generate a drawdown of funds for an activity.

E Reports Menu	Lets you creates a report from the list displayed, then download it to your PC for printing or viewing.
F Utilities Menu	Produces a sub-menu where you can run various utilities.
G Subgrant Menu	Lets you create and maintain subfunds and subgrants.
H Receipts Menu	Lets you receipt income from program income, revolving loans, and state revolving funds. After receipting, you draw these funds before EN funds to pay for activities.
I Activity Funding Menu	Lets you identify and commit funds from each grant that is funding the activity. Once funded, drawdowns can be performed for the activity.
J Plan/Project Menu	Lets you establish a plan year and project within IDIS.
K Go To Menu	Establishes quick access to frequently-used IDIS screens. To go directly to a menu option (if you know its number), enter the letter of the option (as listed above) and the two digit screen number. (For example, if a Grantee seeks to initiate a drawdown they must first <i>authorize</i> themselves. Instead of typing D at the Main Menu and going through the Drawdown Menu, it is faster to type "D01" to get to the Authorization screen)
L IDIS News Menu	Lets you view IDIS News messages.
X Exit IDIS	Log you out of the system and returns you to the "HUD House" screen in Web390.

3.5 Navigating in IDIS

3.5.1 Moving Around the System

The IDIS Main Menu drives the entire system. IDIS's menus and sub-menus are linked together in a logical path predetermined by the system design. You use the menus to initiate an action; while you use the screens primarily to collect information. What you enter on a particular screen will vary depending on the action you requested.

Use the <**Tab**> key to move down the screen and between fields. The cursor moves from left to right on each line. You should **not** use the <**Enter**> key for navigation; IDIS interprets <**Enter**> as a request to communicate information to the mainframe.

The table below lists the major navigation keys:

Navigation Key	IDIS Meaning
< Tab >	Moves down screen
< Shift > + < Tab >	Moves up screen
< Enter >	Saves what you typed; moves you to next screen
< End >	Deletes all information within a field at and to the right of the cursor
< SpaceBar >	Delete characters within a field
< Home >	Return to initial cursor location on a screen

Here are a few other navigation hints:

- If you completely fill a field, the cursor jumps to the next data entry spot. If you partially fill a field, you must help the cursor along with <**Tab**> key.
- While in IDIS, press <**Alt**> + <**Tab**> simultaneously to switch to another Windows application. Press <**Alt**> + <**Tab**> until you return to IDIS.

3.5.2 Jumping to a Menu Option

To go directly to a menu option (if you know its number), enter the letter of the option (as listed above) and the two digit screen number.

(For example, if a Grantee seeks to initiate a drawdown they must first *authorize* themselves. Instead of typing D at the Main Menu and going through the Drawdown Menu, it is faster to type “D 01” to get to the Authorization screen)

3.5.3 Field Colors

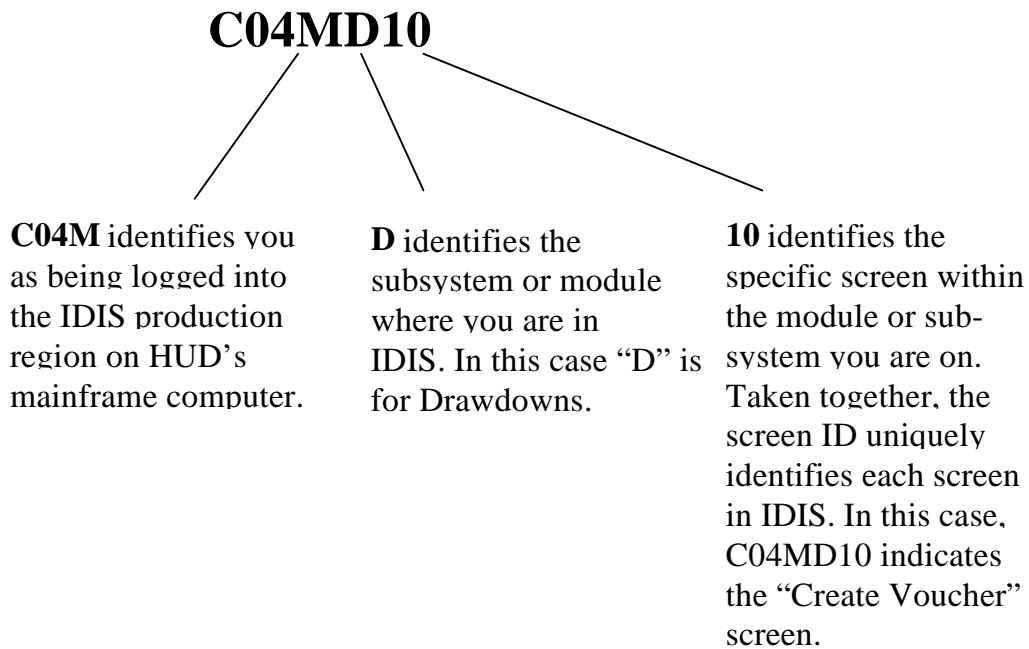
IDIS color codes the fields you see on your screen so you will know what action is required from you. The table below describes what each color means:

Field Color	IDIS Meaning
Blue	A protected field; you cannot change what you see.
Green	You can type in data in the field.
White/yellow	Messages from IDIS.
Red	One of two definitions: IDIS requires you to fill in this field before you can proceed; or Your entry in the field is incorrect; the field may or may not be required.
Red Field Notes	When you press <F3>, IDIS will display any required field on the screen that you haven't filled in yet in red. On each screen these fields must be filled out before you can go to the next screen. The system is designed so that all required fields must be complete before the first dollar for an activity may be drawn down and disbursed. Even though some IDIS fields may not have been programmed to turn red and require an entry before moving on, a grantee may still need to fill in the field in order to satisfy a program's reporting requirements.

3.5.4 How To Interpret IDIS Screen IDs

Figure 3-1 shows how the IDIS screen IDs that appear in the upper right corner of every screen are formatted. Each IDIS screen has a unique ID.

Figure 3-1 Screen IDs



3.5.6 Understanding the Function Keys

On most IDIS menus and screens, you will see several function or **F** key options listed at the bottom of each screen. Function keys are like *hot* keys. They take you immediately to a specific place – a menu, screen or a help screen.

On your PC keyboard, function keys 1-12 are located along the top row, directly above the number keys. When using Web390 Internet access, function keys 13-24 are accessed by right-clicking on your mouse and selecting the key from the pop-up. The definitions for these keys appear at the bottom of most IDIS screens once you are in the system. The meaning assigned to a particular key changes depending on what screen/menu option you are viewing.

The chart below describes the most frequently used function keys. Discussion of the other function keys is included in the chapters where the related functions are covered in detail.

What the Most Commonly Used Function Keys Do:

<F1> HELP	Help in the field where the cursor is positioned (sometimes not available).
<F2> HELP	Help for project list when you have selected View Activities or Activity Funding.
<F3> VALIDATE	Validates field information you type on a given screen. If necessary, moves cursor to field where data entry is required.
<F4> MAIN MENU	Takes you back to the Main Menu from wherever you are. Be careful as this key does not save your information.
<F5> PROJECT INFO	Identifies the funding amounts from the four formula grant programs for a specified project.
<F6> CLEAR INFO	Clears data from the screen.
<F7> PREVIOUS SCREEN	Moves you to a previous screen (not necessarily the screen that you were just on) or saves the screen just left.
<F8> NEXT SCREEN	Moves you forward without saving data
<F9> SAVE	Saves your work, keeps cursor on current page, or, if applicable, moves cursor to field where data entry is required.
<F17> Scroll Backward (or Up)	Allows you to move in the direction indicated.
<F18> Scroll Forward (or Down)	Allows you to move in the direction indicated.

**<ENTER>, <F3>, <F9> AND <TAB> KEYS:**

The **<ENTER>** key saves, validates, and moves you forward. Press this key only when you are ready to save your information and move to the next screen.

<F3> validates the information on the screen but does not **does not** save.

<F9> saves and validates but does not move you forward.

<TAB> moves you from field to field; it does not move you to the next screen.

3.6 IDIS Data Quality

IDIS can only be an effective program management tool for grantees if the data entered into the system is accurate, timely, complete, and relevant. Moreover, the data populates the IDIS reports, some of which are read by key constituents and may influence future funding levels for a jurisdiction.

It is essential that the individuals responsible for entering the data into the system understand the importance of consistently maintaining high quality data. Equally as important, it is crucial that the individuals working with the system have sufficient training, understand the projects and activities being conducted by their jurisdiction, and are conversant with the functions performed by others working with the system.

IDIS has limited internal data review mechanisms that help ensure the integrity of the data. The system runs logical checks on some fields but not on all of the relevant fields. As discussed in Subsection 3.5.3, Field Colors, the field color coding promotes the maintenance of clean and complete data but is not foolproof. Even though a field may not be programmed to turn red and require an entry before moving on, a grantee may still have to fill it out in order to satisfy a program's reporting requirements.