

Chapter 2

PROJECTS

IDIS projects correspond to your Consolidated Plan/Action Plan projects, which describe the work you will be carrying out in the coming program year with the CPD grant funds you are awarded. Each IDIS project is set up under a specific plan year.

ACCESSING THE PROJECT FUNCTIONS

Click the Plans/Projects/Activities tab at the top of any screen to display the Search Activities screen. On it and all other Plans/Projects/Activities screens, links to the project functions you are authorized to access are listed on the left:

The screenshot displays the IDIS web application interface. On the left, a sidebar contains several navigation menus: 'User ID: C00063', 'User Role: Grantee', 'Organization: NEW HAMPSHIRE', and '- Logout'; 'Activity' with sub-items '- Add', '- Search', '- Search HOME', '- Review', and '- CDBG Cancellation'; 'Project' with sub-items '- Add', '- Search', and '- Copy' (highlighted with a blue bracket); 'Utilities' with sub-items '- Home', '- Data Downloads', '- Print Page', and '- Help'; and 'Links' with sub-items '- Contact Support', '- Rules of Behavior', '- CPD Home', and '- HUD Home'. The main content area features a top navigation bar with tabs: 'Plans/Projects/Activities' (selected), 'Funding/Drawdown', 'Grant', 'Grantee/PJ', and 'Admin'. Below the tabs, an orange banner states: 'You have 23 CDBG activities that have been flagged. Click here to go to the review page.' The main section is titled 'Activity' and contains a 'Search Activities' form. The form includes 'Search Criteria' with fields for 'Program:' (dropdown menu set to 'All'), 'Activity Name:' (text input), and 'Program Year:' (dropdown menu set to 'Select'). It also includes 'IDIS Project ID:' (text input), 'IDIS Activity ID:' (text input), 'Grantee/PJ Activity ID:' (text input), 'Status:' (dropdown menu set to 'All'), and 'Activity Owner:' (dropdown menu set to 'NEW HAMPSHIRE'). At the bottom of the form are 'Search' and 'Reset' buttons.

Each of the three Project functions is explained below.

ADD PROJECTS

Click the Project Add link on any Plans/Projects/Activities tab screen to display the Add Project screen:

Project

Add Project

Save | Reset

***Indicates Required Field**

Grantee/PJ Name:
NEW HAMPSHIRE

Program Year

***Program Year:** **Add New Program Year:**
(ex: yyyy)

IDIS Project ID:

***Project Title:**

Grantee/PJ Project ID:

Description:

Allow Another Organization to Set up Activities under this Project: ⓘ

Select Organization

Assign Sponsor for this Project (only for HOPWA or HOPWA-C programs): ⓘ

Select Sponsor Organization

Estimated Amount (Including Program Income)

Section 108 Loan amount	\$ <input type="text" value="0.00"/>
CDBG	\$ <input type="text" value="0.00"/>
HOME	\$ <input type="text" value="0.00"/>
ESG	\$ <input type="text" value="0.00"/>
HOPWA	\$ <input type="text" value="0.00"/>
CDBG-R	\$ <input type="text" value="0.00"/>
HPRP	\$ <input type="text" value="0.00"/>
TCAP	\$ <input type="text" value="0.00"/>
HESG	\$ <input type="text" value="0.00"/>
HOPWA-C	\$ <input type="text" value="0.00"/>
Total	<input type="text" value="0.00"/>

Save | Reset

The required fields on the Add Project screen are PROGRAM YEAR, PROJECT TITLE, and ESTIMATED AMOUNT.

Field	Description
Grantee/PJ Name	This read-only field shows the name of the grantee whose Consolidated Plan/Action Plan the project is being set up under.
Program Year	Select the program year under which the project is to be set up. If the year you want is not listed, leave this field blank and tab to the next field, ADD NEW PROGRAM YEAR.
Add New Program Year	To add a year that is not listed on the PROGRAM YEAR dropdown, click this box and type in the new year.
IDIS Project ID	Initially this field is blank. The system assigns an ID the first time the project is saved.
Project Title	Enter a name for the project, following the naming standards your organization has established.
Grantee/PJ Project ID	To assign your own identifier to this project, enter it here.
Description	A description of the project is optional.
Allow Another Organization to Set Up Activities under this Project	<p>To allow IDIS users at another organization to set up activities under this project:</p> <ul style="list-style-type: none"> • Click the [Select Organization] button. • On the Select Organization page, enter search criteria if you wish or leave the search fields blank to display a list that includes your HOME subgrantees. • Click the [Search] button. • Select an organization by clicking first on the radio button next to its name and then on the [Select] button. <p>To return to the Add Project page without making a selection, click the [Cancel] button.</p>
Assign Sponsor for this Project (only for HOPWA or HOPWA-C Programs)	Not applicable to HOME projects.
Estimated Amount (Including Program Income)	<p>The programs listed here depend on your security profile.</p> <p>Enter the estimated amount of Section 108 loan funds and/or the amount of grant funds and program income budgeted for this project from each CPD program. You must enter at least one amount; you may enter more than one.</p> <p>Input the amount as dollars and cents. If you omit the cents, the system will append '.00'.</p>

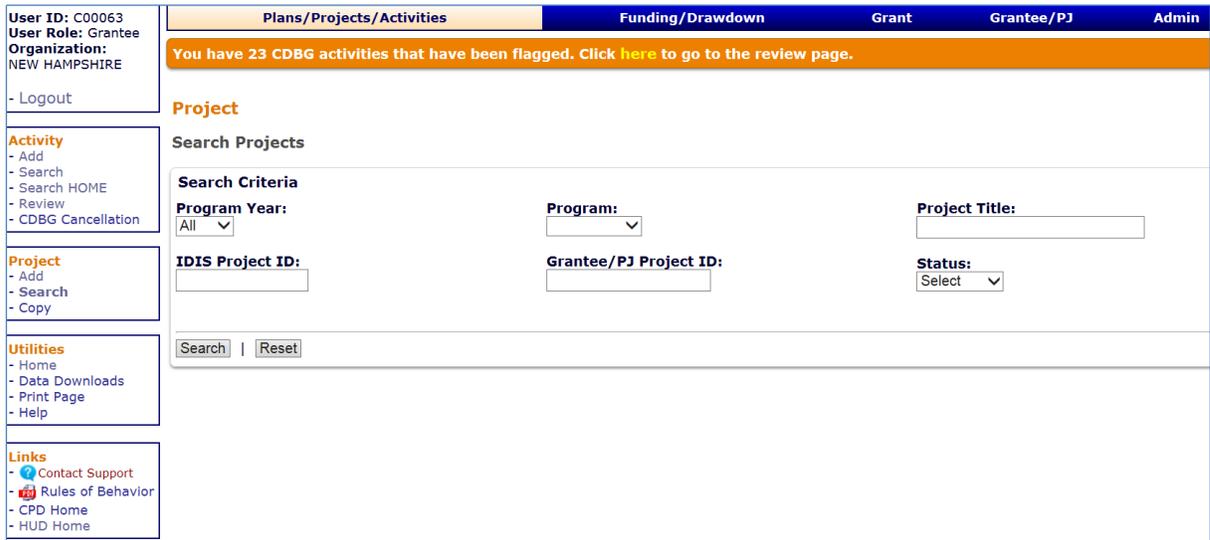
Click the [Save] button to add the project or the [Reset] button to exit without saving. When a project is saved, the screen is returned in edit mode (see page 2-6). Clicking [Reset] displays the Search Projects screen, explained on the next page.

EDIT/VIEW PROJECTS

To edit or view a project, you must first conduct a search to retrieve it. Click the [Project Search](#) link on any Plans/Projects/Activities tab screen to access the Search Projects screen.

SEARCH PROJECTS SCREEN

Specify as many or few search criteria as you wish to retrieve the project(s) you want to edit/view:



Field	Description
Program Year	To limit the results to a particular year, select it from the dropdown.
IDIS Project ID	To limit the results to a particular project, enter the project's system-assigned ID. Specifying a PROGRAM YEAR and an IDIS PROJECT ID will uniquely identify a project.
Program	Specify a program to narrow the results to projects where the ESTIMATED AMOUNT for the selected program is greater than zero.
Grantee/PJ Project ID	Limit the results to projects with a GRANTEE/PJ PROJECT ID that contains the text string you enter here.
Project Title	Limit the results to projects with a PROJECT TITLE that contains the text string you enter here.
Status	Search for projects with a particular status by selecting Open or Canceled .

Click the [Search] button to run the search and display the projects that meet the criteria you specified:

Project

Search Projects

Search Criteria

Program Year: 2011 ▾

Program: HOME ▾

Project Title:

IDIS Project ID:

Grantee/PJ Project ID:

Status: Select ▾

|

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<u>Program Year</u>	<u>IDIS Project ID</u>	<u>Grantee/PJ Project ID</u>	<u>Project Title</u>	<u>Project Owner</u>	<u>Status</u>	<u>Action</u>
2011	1	NH Housing	Sugar River Mills - Claremont	NEW HAMPSHIRE, NH	Open	Edit View
2011	2	NH Housing	The Townhomes at Mallard Place aka Whitehall Road	NEW HAMPSHIRE, NH	Open	Edit View
2011	3	NH Housing	Harriman Hill Apartments	NEW HAMPSHIRE, NH	Open	Edit View
2011	6	NH Housing	Town and Country Phase II	NEW HAMPSHIRE, NH	Open	Edit View
2011	7	NH Housing	Wamesit Place	NEW HAMPSHIRE, NH	Open	Edit View
2011	9	NH Housing	Administrative Expenses	NEW HAMPSHIRE, NH	Canceled	View
2011	25	NH Housing	Conway Pines	NEW HAMPSHIRE, NH	Open	Edit View
2011	31	NH Housing	Administrative Expense 2011	NEW HAMPSHIRE, NH	Open	Edit View
2011	36	11-038-CDHS	KEENE- BROOKBEND WEST	NEW HAMPSHIRE, NH	Open	Edit View
2011	38	NH Housing	GREENER HOMES - NH HOUSING	NEW HAMPSHIRE, NH	Open	Edit View

1 2 [Next 10 Results](#)

On initial display, the results are sorted by PROGRAM YEAR (descending) and IDIS PROJECT ID (ascending). You can change the sort field and the sort order (ascending or descending) by clicking on any column header that is in blue and underlined.

Select the project you want to process by clicking the [Edit](#) or [View](#) link in the last column. Only the [View](#) link will be available for canceled projects and for users not authorized to edit projects.

Depending on the link selected, the Edit Project or View Project screen will be displayed. The two screens are very similar except, of course, that data on the View screen cannot be changed. Only the Edit Project screen is shown here.

EDIT PROJECT SCREEN

The Edit Project screen is quite similar to the Add Project screen:

Project

Edit Project

|
 |
 |
 |

***Indicates Required Field**

Grantee/PJ Name:
NEW HAMPSHIRE

Program Year:
2011

IDIS Project ID:
36

Status:
Open

***Project Title:**
KEENE- BROOKBEND WEST

Grantee/PJ Project ID:
11-038-CDHS

Description:
The proposed project will demolish 35 units of HUD supported affordable housing that is in danger of losing their HAP contract because units suffer from a bad design, life safety code deficiencies, deferred maintenance and a lack of handicapped units. 35 new units will be constructed which will increase handicapped accessibility of the entire site, provide 2 handicap living units, continue compliance with HUD

Allow Another Organization to Set up Activities under this Project:

Assign Sponsor for this Project (only for HOPWA or HOPWA-C programs):

Estimated Amount (Including Program Income)

Section 108 Loan amount	\$ 0.00
CDBG	\$ 500000.00
HOME	\$ 750000.00
ESG	\$ 0.00
HOPWA	\$ 0.00
CDBG-R	\$ 0.00
HPRP	\$ 0.00
TCAP	\$ 0.00
HESG	\$ 0.00
HOPWA-C	\$ 0.00
Total	1250000.00

|
 |
 |
 |

The first four fields—GRANTEE/PJ NAME, PROGRAM YEAR, IDIS PROJECT ID, and STATUS—are protected from update. The STATUS of every project that can be edited is **Open**, meaning that activities may be set up under it.

All of the other fields (described on page 2-3) may be changed.

Click the [Save] button to save your changes or the [Return to Projects] button to exit without saving.

Additional buttons on this screen are:

- [View History], enabled only if any ESTIMATED AMOUNT has ever been changed. Clicking it displays the Project History screen, which shows what the amount(s) were changed from.
- [View Activities], which displays a list of the activities set up under a project. There is a link for returning to the Edit Project screen next to the [Reset] button on the activity list screen.
- [Cancel Project], enabled only if there are no activities or only canceled activities set up under the project. Click it to change the project status to **Canceled**, meaning that activities cannot be set up under it. You will be asked to confirm the cancellation on a separate screen. A project that has been canceled may be reopened (see page 2-9).

COPY PROJECTS

Click the Project Copy link on any Plans/Projects/Activities tab screen to display the Copy Project screen:

Project

Copy Project

[Copy Projects](#)

***Indicates Required Field**

Search Criteria

Program Year: **Program:** **Project Title:**

IDIS Project ID: **Grantee/PJ Project ID:**

(ex: nnnn) (ex: x- nnnn-xxxx)

|

Program Year

***Copy Project to Program Year:** **Copy Project to New Program Year:**

(ex: yyyy) (ex: yyyy)

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<u>Program Year</u>	<u>IDIS Project ID</u>	<u>Grantee/PJ Project ID</u>	<u>Project Title</u>	*Copy
2012	1	12M MF NHH	12M Peterborough Commons	<input type="checkbox"/>
2011	1	NH Housing	Sugar River Mills - Claremont	<input type="checkbox"/>
2011	2	NH Housing	The Townhomes at Mallard Place aka Whitehall Road	<input type="checkbox"/>
2011	3	NH Housing	Harriman Hill Apartments	<input type="checkbox"/>
2011	4	11-077-CDED	BETHLEHEM- WREN MICRO	<input type="checkbox"/>
2011	5	11-150-CDHS	CONCORD- FISHERVILLE COOP	<input type="checkbox"/>
2011	6	NH Housing	Town and Country Phase II	<input type="checkbox"/>
2011	7	NH Housing	Wamesit Place	<input type="checkbox"/>
2011	8	11-408-CDHS	ROCKINGHAM CTY- MEETING PLACE II	<input type="checkbox"/>
2011	10	11-197-CDED	LITTLETON- GCEDC/ROTOBEC USA	<input type="checkbox"/>

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [Next 10 Results](#)

The screen is divided into three sections: Search Criteria, Program Year, and Results.

Search Criteria

On initial display, all of your projects are listed. You can limit the results (and so reduce the amount of paging you may need to do) by running a search (see page 2-4 for details).

Program Year

On the COPY PROJECT TO PROGRAM YEAR dropdown, click the program year the project is to be copied to. If the year you want is not listed, leave this field blank and tab to the next field, COPY PROJECT TO NEW PROGRAM YEAR. Click the box and type in the new year.

Results

Click the box in the Copy column of each project to be copied, and then click the [Copy Projects] button at the top/bottom of the page. The Copy Projects page is redisplayed with the copied projects included in the results.

REOPEN A CANCELED PROJECT

To change the status of a project from **Canceled** back to **Open**, choose the View link for the canceled project on the Search Projects screen (see pages 2-4 and 2-5). The View Project screen is displayed:

Project

View Project

[Return To Projects](#) |
 [Reopen Project](#) |
 [View History](#) |
 [View Activities](#)

Grantee/PJ Name:
NEW HAMPSHIRE

Program Year:
2011

IDIS Project ID:
9

Status:
Canceled

Project Title:
Administrative Expenses

Grantee/PJ Project ID:
NH Housing

Description:
Administrative Expenses M-11-SG-33-0100

Allow Another Organization to Set up Activities under this Project: (tip)

Assign Sponsor for this Project (only for HOPWA or HOPWA-C programs): (tip)

Estimated Amount (Including Program Income)

Section 108 Loan amount	\$0.00
CDBG	\$0.00
HOME	\$0.70
ESG	\$0.00
HOPWA	\$0.00
CDBG-R	\$0.00
HPRP	\$0.00
TCAP	\$0.00
HESG	\$0.00
HOPWA-C	\$0.00
Total	\$0.70

[Return To Projects](#) |
 [Reopen Project](#) |
 [View History](#) |
 [View Activities](#)

Click the [Reopen Project] button at the top/bottom of the screen. The Search Projects screen is redisplayed showing the project with a STATUS of **Open**.

To exit without reopening the canceled project, click the [Return to Projects] button.