

# Chapter 2

## PROJECTS

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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.

For PJs who use IDIS to submit their Consolidated Plan or Annual Action Plan, the Plan projects are added as IDIS projects immediately upon being added in the AP-35 screen of the Action Plan. For more information on completing the Consolidated Plan and Annual Action Plan in IDIS, see [Consolidated Plan Guides and Tools](#).

### 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 Search Activities interface. On the left, a sidebar menu lists navigation options: User (Role: Grantee, Organization: RICHMOND, with links for Switch Profile and Logout), Activity (Add, Search, Search HOME/HTF, Review, CDBG Cancellation), Project (Add, Search, Copy), Consolidated Plans (Add, Copy, Search), and Annual Action Plans (Add). The main content area features a top navigation bar with tabs for Plans/Projects/Activities, Funding/Drawdown, Grant, and Grantee. Below this is a notification banner: "You have 58 CDBG and 1 HOME activities that have been flagged. Click on the number to go to the review page." The "Activity" section is titled "Search Activities" and includes "Search Criteria" with the following fields: Program (dropdown menu set to "All"), IDIS Project ID (text input), Status (dropdown menu set to "All"), Activity Name (text input), IDIS Activity ID (text input), Program Year (dropdown menu set to "Select"), Grantee/PJ Activity ID (text input), and Activity Owner (dropdown menu set to "RICHMOND, VA"). At the bottom of the search criteria are "Search" and "Reset" buttons.

Each of the three Project functions is explained below.

## ADD PROJECTS

This section explains how to add a project manually in IDIS. Note that if you submit your Consolidated Plan or Annual Action Plan via IDIS, the manually-added projects will not be properly tied to the Action Plan.

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

**Project**

Add Project

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Save | Reset

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**\*Indicates Required Field**

**Grantee/PJ Name:**  
RICHMOND

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**Program Year**

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

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**IDIS Project ID:**

**\*Project Title:**

**Grantee/PJ Project ID:**

**Description:**

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**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

**Grant # (only for HOPWA-C program):** Select Grant

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**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"/>
HTF	\$	<input type="text" value="0.00"/>
<b>Total</b>		<input type="text" value="0.00"/>

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Save | Reset

The required fields 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.
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"> <li>• Click the [Select Organization] button.</li> <li>• 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.</li> <li>• Click the [Search] button.</li> <li>• Select an organization by clicking first on the radio button next to its name and then on the [Select] button.</li> </ul> <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.
Grant # (only for HOPWA-C program)	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 the project. 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 as 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 <b>Open</b> or <b>Canceled</b> .

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

**Project**

Search Projects

**Search Criteria**

**Program Year:** 2013

**Program:** HOME

**Project Title:**

**IDIS Project ID:**

**Grantee/PJ Project ID:**

**Status:** Select

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**Results Page 1 of 1**

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2013	1	NH Housing 2013 MFGH	Woodbury Mills	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	4	NH Housing 2013 MFGH	Cotton Mill	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	5	NH Housing 2013 MFGH	Marlborough Homes	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	6	NH Housing 2013 MFGH	Newport Village	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	7	NH Housing 2013 MFGH	Newport House	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	8	NH Housing 2013 MF	Harriman Hill Phase 2	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	26	NH Housing 2013 AD	NH Housing HOME 2013 Administrative Expense	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	27	2013 MF NH Housing	Notre Dame Apartments	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>
2013	42	NH Housing 2013 MF	Bow Highlands Phase II	NEW HAMPSHIRE, NH	Open	<a href="#">Edit</a>   <a href="#">View</a>

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 (displayed in blue).

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.

## EDIT PROJECT SCREEN

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

**Project**

Edit Project

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**\*Indicates Required Field**

**Grantee/PJ Name:**  
RICHMOND

**Program Year:**  
2015

**IDIS Project ID:**  
11

**Status:**  
Open

**\*Project Title:**

**Grantee/PJ Project ID:**

**Description:**  
 The SCDHC will continue its effort to revitalize the Bellemeade community. The SCDHC's activity will continue to build 8 of the 16 new earthcraft single family homes in the Mimosa Creek neighborhood for LMI residents.

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

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

**Grant # (only for HOPWA-C program):**  ▾

**Estimated Amount (Including Program Income)**

Section 108 Loan amount	\$	<input type="text" value="0.00"/>
CDBG	\$	<input type="text" value="200000.00"/>
HOME	\$	<input type="text" value="141819.00"/>
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"/>
HTF	\$	<input type="text" value="0.00"/>
<b>Total</b>		<input type="text" value="341819.00"/>

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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 PJs may set up activities under the project.

All 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 on this button displays the Project History screen, which shows changes to the ESTIMATED AMOUNT.
- [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 located next to the [Reset] button on the View Activities screen.
- [Cancel Project], enabled only if there are no activities or only canceled activities set up under the project. Click this button to change the project status to **Canceled**. Please keep in mind that activities cannot be set up under cancelled projects. 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

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[Copy Projects](#)

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\*Indicates Required Field

**Search Criteria**

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

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

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

|

**Program Year**

**\*Copy Project to Program Year:**

(ex: yyyy)

**Results Page 1 of 93**

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2014	1	10	HESG14 NH - DHHS- BHHS	<input type="checkbox"/>
2013	1	NH Housing 2013 MFGH	Woodbury Mills	<input type="checkbox"/>
2013	2	13-053-CDHS	Berlin Notre Dame Housing	<input type="checkbox"/>
2013	3	13-167-EGPF	Warner Graded School Community Center Boiler Replacement	<input type="checkbox"/>
2013	4	NH Housing 2013 MFGH	Cotton Mill	<input type="checkbox"/>
2013	5	NH Housing 2013 MFGH	Marlborough Homes	<input type="checkbox"/>
2013	6	NH Housing 2013 MFGH	Newport Village	<input type="checkbox"/>
2013	7	NH Housing 2013 MFGH	Newport House	<input type="checkbox"/>
2013	8	NH Housing 2013 MF	Harriman Hill Phase 2	<input type="checkbox"/>
2013	9	13-007-FSHS	Laconia - LHA/Strafford House Study	<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 in the Results section. You can limit the results (and reduce the amount of paging you may need to do) by entering search criteria in this section (see page 2-4 for details).

### Program Year

On the COPY PROJECT TO PROGRAM YEAR dropdown, select a program year for the copied project. If the year you want is not listed, leave this field blank and tab to the next field, COPY PROJECT TO NEW PROGRAM YEAR, where you may 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 Project page is redisplayed with the copied projects included in the results.



## REOPEN A CANCELED PROJECT

To change the status of a project from **Canceled** 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

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

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**Grantee/PJ Name:**  
RICHMOND

**Program Year:**  
2010

**IDIS Project ID:**  
22

**Status:**  
Canceled

**Project Title:**  
Matthew Heights Revitalization

**Grantee/PJ Project ID:**  
SCDHC

**Description:**  
 Southside Community Development and Housing Corporation (SCDHC) will use HOME funds to revitalize two (2) parcels of land known as Matthews Heights in the Highland Park Neighborhood. SCDHC will prepare for the subdivision of Matthews Heights and the parcel of land known as 1628 Matthews Street for eventual construction of twenty-six (26) Townhouses for sale; three (3) new single family detached houses and one (1) substantially rehabilitated historical house. The new single family detached homes and substantially

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

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

**Grant # (only for HOPWA-C program):**

**Estimated Amount (Including Program Income)**

<b>Section 108 Loan amount</b>	\$0.00
<b>CDBG</b>	\$0.00
<b>HOME</b>	\$175,000.00
<b>ESG</b>	\$0.00
<b>HOPWA</b>	\$0.00
<b>CDBG-R</b>	\$0.00
<b>HPRP</b>	\$0.00
<b>TCAP</b>	\$0.00
<b>HESG</b>	\$0.00
<b>HOPWA-C</b>	\$0.00
<b>HTF</b>	\$0.00
<b>Total</b>	\$175,000.00

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[Return To Projects](#) | 
 [Reopen Project](#) | 
 [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.