

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.

For grantees who use IDIS to submit their Consolidated Plan or Annual Action Plan, the Plan projects are added as IDIS projects when the Plan is approved. 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 web application interface. On the left, a sidebar contains several navigation menus: 'User' (C00063, Grantee, Organization: FLORENCE, with links for Switch Profile and Logout), 'Activity' (Add, Search, Search HOME, Review, CDBG Cancellation), 'Project' (Add, Search, Copy), 'Utilities' (Home, Data Downloads, Print Page, Help), and 'Links' (Contact Support, Rules of Behavior, CPD Home, HUD Home). A blue bracket highlights the 'Project' menu. The main content area has a top navigation bar with tabs: 'Plans/Projects/Activities' (selected), 'Funding/Drawdown', 'Grant', 'Grantee/PJ', and 'Admin'. Below the navigation bar is an orange notification banner: 'You have 1 CDBG activities that have been flagged. Click on the number to go to the review page.' The main section is titled 'Activity' and contains a 'Search Activities' form. The 'Search Criteria' section includes: 'Program:' (dropdown menu with 'All' selected), 'Activity Name:' (text input field), 'Program Year:' (dropdown menu with 'Select' selected), 'IDIS Project ID:' (text input field), 'IDIS Activity ID:' (text input field), 'Grantee/PJ Activity ID:' (text input field), 'Status:' (dropdown menu with 'All' selected), and 'Activity Owner:' (dropdown menu with 'FLORENCE, SC' selected). At the bottom of the search form are 'Search' and 'Reset' buttons.

The Add, Search, and Copy functions are 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, any projects that you add manually will not be properly tied to the Action Plan.

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

Project

Add Project

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*Indicates Required Field

Grantee/PJ Name:
FLORENCE

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: ?

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="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"/>

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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 this 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 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. • 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 selecting an organization, click the [Cancel] button.</p>
Assign Sponsor for this Project (only for HOPWA or HOPWA-C Programs)	Not applicable to CDBG projects.
Grant # (only for HOPWA-C program)	Not applicable to CDBG projects.
Estimated Amount (Including Program Income)	<p>Enter the amount(s) of Section 108 loan funds and/or grant funds and program income budgeted for this project. You must enter one amount; you may enter more than one.</p> <p>Input amounts 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 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 update/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/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: **Program:** **Project Title:**

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

|

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2015	1		Emergency Rehabilitation	FLORENCE, SC	Open	Edit View
2015	2		Downpayment Assistance	FLORENCE, SC	Open	Edit View
2015	3		Pee Dee Community Action Agency Transitional Shelter	FLORENCE, SC	Open	Edit View
2015	4		Manna House	FLORENCE, SC	Open	Edit View
2015	5		The Salvation Army	FLORENCE, SC	Open	Edit View
2015	6		Who So Ever	FLORENCE, SC	Open	Edit View
2015	7		Lighthouse Ministries	FLORENCE, SC	Open	Edit View

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

Select the project you want to process by clicking its [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

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***Indicates Required Field**

Grantee/PJ Name:
FLORENCE

Program Year:
2015

IDIS Project ID:
1

Status:
Open

***Project Title:**

Grantee/PJ Project ID:

Description:

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="41710.00"/>
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="41710.00"/>

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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 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 page.
- [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 another 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 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)

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Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2015	1		Emergency Rehabilitation	<input type="checkbox"/>
2015	2		Downpayment Assistance	<input type="checkbox"/>
2015	3		Pee Dee Community Action Agency Transitional Shelter	<input type="checkbox"/>
2015	4		Manna House	<input type="checkbox"/>
2015	5		The Salvation Army	<input type="checkbox"/>
2015	6		Who So Ever	<input type="checkbox"/>
2015	7		Lighthouse Ministries	<input type="checkbox"/>
2014	1	510-810010-F0156	Planning and Administration 2014	<input type="checkbox"/>
2014	2	510-810010-F0157	Recreation Improvements Section 108 Loan Repayment 2015	<input type="checkbox"/>
2014	3	510-810010-F0158	Emergency Rehabilitation 2014	<input type="checkbox"/>

1 2 3 4 5 6 7 8 9 10 Next 10 Results

[Copy Projects](#)

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

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

Results

Click the box in the Copy column of each project to be copied, 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](#)

Grantee/PJ Name:
FLORENCE

Program Year:
2013

IDIS Project ID:
5

Status:
Canceled

Project Title:
Abandoned House/Vacant Lot Clearance

Grantee/PJ Project ID:
510-810010-F0152

Description:
Demolition of Selected Abandoned Houses and Clearance of Selected Vacant Lots within the CDBG Target Area

Allow Another Organization to Set up Activities under this Project: [\(tip\)](#)

Assign Sponsor for this Project (only for HOPWA or HOPWA-C programs): [\(tip\)](#)

Grant # (only for HOPWA-C program):

Estimated Amount (Including Program Income)

Section 108 Loan amount	\$0.00
CDBG	\$66,626.00
HOME	\$0.00
ESG	\$0.00
HOPWA	\$0.00
CDBG-R	\$0.00
HPRP	\$0.00
TCAP	\$0.00
HESG	\$0.00
HOPWA-C	\$0.00
Total	\$66,626.00

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

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.