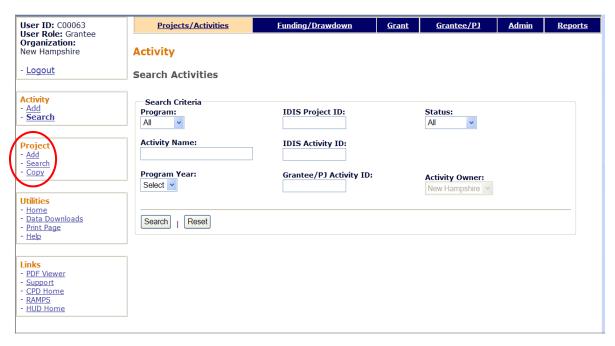# Chapter 2
PROJECTS

IDIS OnLine 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 formula funds you are awarded. Each IDIS OnLine project is set up under a specific plan year.
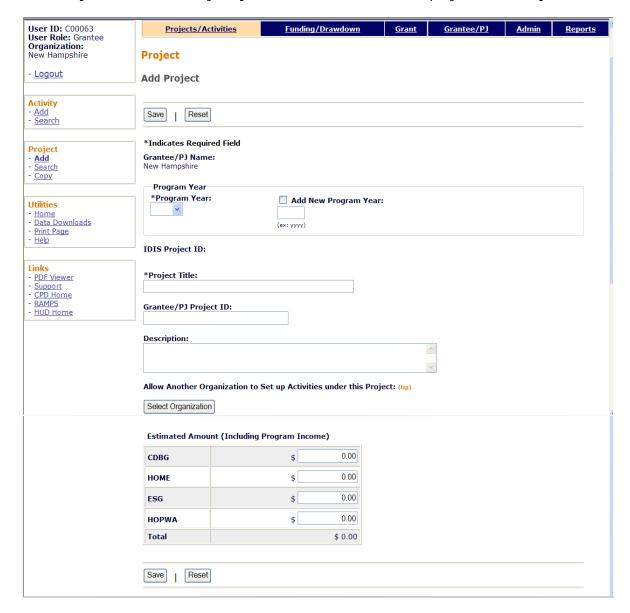
ACCESSING THE PROJECT FUNCTIONS

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

Each of the three functions is explained below.

ADD PROJECTS

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

The required fields on this screen are PROGRAM YEAR, PROJECT TITLE, and ESTIMATED AMOUNT.

Field	Description
Grantee/PJ Name	This read-only field shows the name of the grantee who owns the 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 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 then type in the new year.

Field	Description
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	If you want 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	If you do not create subgrants, ignore this field. Otherwise, to allow IDIS users at an organization that you have created a subgrant for to be able to set up activities under this project: • 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 of all your 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. To return to the Add Activity page without making a selection, click the <Cancel> button.
Estimated Amount (Including Program Income)	Enter the amount of grant funds and program income budgeted for this project from each CPD program. You must enter an amount for one program; you may enter amounts for more than one. Input the amount as dollars and cents. If you omit the cents, the system will append '.00'.

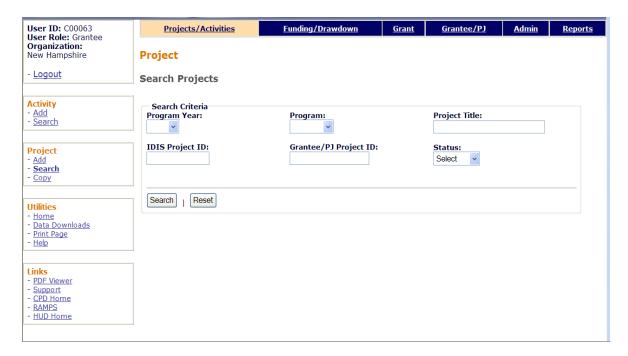Click the <Save> button to add the project or the <Reset> button to clear the screen.

When a project is saved, the screen is returned in edit mode. The Edit Project screen is explained in detail on page 2-6. For now, note that you can add another project by clicking the <Return to Projects> button at the top/bottom of the edit screen.

EDIT/VIEW PROJECTS

To edit or view a project, you must first conduct a search to retrieve it. Click the Project <u>Search</u> link on any 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 edit/view:

Search 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. If you specify both PROGRAM YEAR and IDIS PROJECT ID, which together uniquely identify a project, there is no point in filling in any of the other search fields.
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:

| User ID: C00063 User Role: Grantee Organization: New Hampshire - Logout | Projects/Activities | Funding/Drawdown | Grant | Grantee/PJ | Admin | Reports |

Project

Search Projects

Search Criteria

| Program Year: | Program: | Project Title: |
| 2008 | HOME | |

| IDIS Project ID: | Grantee/PJ Project ID: | Status: |
| | | Open |

Search | Reset

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2008	3		ADMINISTRATIVE EXPENSE	New Hampshire, NH	Open	Edit | View
2008	31		HOME ADDI	New Hampshire, NH	Open	Edit | View
2008	38		SINGLE FAMILY REHAB PROGRAM 2008-2010	New Hampshire, NH	Open	Edit | View
2008	39		SOUTH PORTER SENIOR HOUSING	New Hampshire, NH	Open	Edit | View
2008	48		MEETING PLACE AT EXETER	New Hampshire, NH	Open	Edit | View
2008	51		WOODS EDGE APARTMENTS/ROSEWALD FARM/PHASE II	New Hampshire, NH	Open	Edit | View

Left sidebar navigation:

Activity
- Add
- Search

Project
- Add
- Search
- Copy

Utilities
- Home
- Data Downloads
- Print Page
- Help

Links
- PDF Viewer
- Support
- CPD Home
- RAMPS
- HUD Home

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 (ascending or descending) by clicking on any column header that is in blue and underlined.

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 cancelled 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:

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

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

Click the <Save> button to save your changes or the <Return to Projects> button to exit without saving. Both buttons redisplay the Search Projects screen.

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 cancelled 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. Once a project is cancelled, it cannot be reopened.

COPY PROJECTS

Click the Project <u>Copy</u> link on any Projects/Activities screen to display the Copy Project screen:

User ID: C00063 **User Role:** Grantee **Organization:** New Hampshire - Logout						

Screen content:

Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

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-xxnn)

[Search] | [Reset]

Program Year

*Copy Project to Program Year: [▾]   ☐ **Copy Project to New Program Year:** [_____]

(ex: yyyy)

Results Page 1 of 71

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2009	1		STATE OF NH ADMIN 2009	☐
2009	2	09-036-FSHS	HINSDALE-ASH SWAMP BRK CO-OP TUDY	☐
2009	3	09-070-FSPF	STEWARTSTOWN WATER DISTRICT STUDY	☐
2009	4	09-405-CDED	GRAFTON COUNTY MICROCREDIT	☐
2009	5	09-002-CDED	BARNSTEAD/BCEDC/LAKES REGION PELLETS	☐
2009	6	09-180-HS-R	EXETER-MEETING PLACE HOUSING-CDBG-R	☐
2009	7	09-408-HS-R	ROCKINGHAM COUNTY-RYE SENIOR HOUSING	☐
2009	8	09-072-PF-R	WHITEFIELD-MORRISON CDBG-R	☐
2009	9	09-150-PF-R	CONCORD-SECOND START EMERGY IMPROVEMENTS	☐
2009	11	09-229-ED-R	NEWPORT-FLAGSTONE PK-CDBG-R	☐

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

[Copy Projects]

Sidebar menu:

Activity
- Add
- Search

Project
- Add
- Search
- **Copy**

Utilities
- Home
- Data Downloads
- Print Page
- Help

Links
- PDF Viewer
- Support
- CPD Home
- RAMPS
- HUD Home

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

Click the program year the project is to be copied to on 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 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.