

**1. Browser Buttons**

Do **NOT** use the browser toolbar buttons to navigate back and forward between pages! You have to use the links and buttons on the actual webpage to navigate within IDIS. If you use the browser toolbar buttons by mistake, refresh the page.

**2. Copy, Paste and Insert**

The Copy and Paste or Insert into IDIS fields/narratives or between fields or from other documents works in IDIS Online.

**3. Print Screen**

A Print Screen option is now available on each IDIS screen under the Utilities menu along the left side of the screen.

**4. Screen Width**

Depending on your monitor settings, some of the IDIS pages will be wider than your screen. Remember to scroll to the right to see the entire screen. In many cases, the link you need to go to the next screen is at the far right of the page.

**5. Required Fields**

All fields that are required by the system for you to save the page are marked with an asterisk \*. This is the **MINIMUM** amount of data that should be entered. You should provide data for any field that pertains to the activity you are working on.

**6. “Smart” Dropdown Fields**

Many of the options available under the dropdown fields will be based on the answers from previous fields. For example, once you select a program year, the project dropdown list will limit its selections to the projects associated with the selected year. If you do not see the option you want in a particular dropdown, double-check your previous selections to ensure they are correct.

**7. Menu Options**

The menus displayed on the left hand side of the screen are based on the access given to you. For example, if you do not have access rights for drawdowns, the drawdown menu will not be visible. The local administrator can change a user’s access. Talk to your local IDIS administrator to discuss the access you need.

**8. Log Out Properly**

If you close the IDIS window without logging out properly (clicking on the “logout”) the system will think you are still logged in. This prevents you from logging back into the system for approximately 20 minutes.

**9. Timed Logout**

IDIS OnLine is divided into two sections, Main IDIS (Blue Zone) and MicroStrategy Reports (Red Zone). All time spent in the Red Zone is considered idle time and does not contribute to the 20-minute timeout requirement. The 3-minute warning of timeout occurs only in the Blue Zone. It is recommended that when working in the Red Zone (reports

section) that you periodically return to the Blue Zone and click on a button or link to avoid the automatic timeout.

**10. Save Buttons**

There are several different types of Save buttons. All the buttons will save the screen you are on. Each button will navigate to a different page once the save is complete:

- The “Save” returns you to the first Add/Edit Activity screen.
- The “Save and Continue” takes you to the next page.
- The “Save and Previous” takes you to the prior page.
- The “Save Page” keeps you on the same page.

**11. Avoid Busy Times**

The speed of IDIS depends on the number of users logged in. Grantees on the East Coast can avoid peak usage by using the system in the morning (when West Coasters are still asleep) and West Coast grantees can work more quickly at the end of their day. For users with flexible schedules, IDIS is very fast on Saturday.

**12. Tweak your Browser Settings**

Internet Explorer 8 is not certified for IDIS OnLine reports software. When in IE8, users should go to the Tools tab and click on “Compatibility.” Theoretically this should cause IE8 to run as if it were a lower version of Internet Explorer.

**13. Run Reports Once a Month**

This is a good idea for several reasons. If you do not log in for 90 days, your access rights are revoked until you reset your password by calling HUD. If you do not log in for 6 months, your access rights are revoked until you re-apply. By logging in on a monthly basis, you stay up to date with changes made to the system. By generating reports on a regular basis, you can gauge performance and other important measures such as timeliness of expenditures.