

1. Navigation

Use the Mouse and Action Buttons. The way to navigate throughout the IDIS screens is by menu tabs, dropdown boxes and by the mouse and action buttons.

2. Searching for Activities

The new system allows you to search for activities using several different fields. Most of the fields will allow partial search values. For example, a search for “Code” will include “Code Enforcement.”

3. Separate Setup and Accomplishment Screens

The CDBG activity data is now divided into two different sections. All of the information required prior to funding is found on the Setup Detail pages. All of the accomplishment and performance measurement data required before completion is found on the Accomplishment Detail pages.

4. Funding Check and Completion Check

The Add/Edit activity page now includes a Ready to Fund column that will indicate if an activity can be funded with CDBG. Pay special attention to LMA activities where you need to click the “Calculate LM %” button on Page 3 of Setup Detail in order to fund.

5. Actual Accomplishments

For direct benefit activities (LMC, LMH, LMJ), the actual accomplishments field is automatically calculated based on the numbers entered for race and income.

6. Estimated Amount

The old system contained an Estimated Amount field that many grantees used to reflect their adopted budget. While the Estimated Amount field is not included in the activity screens in the new system, grantees who want to use an Estimated Amount can use the Estimated Amount field associated with the IDIS project instead.

7. Subordinate Organizations

While the old system had a field to enter a subrecipient name, the new system requires supplemental data for each subrecipient, including City, State, and DUNS number. Please refer to Appendix D of *IDIS Online for CDBG Entitlement Communities* for more information. To request or search for a DUNS number, please visit <http://fedgov.dnb.com/webform>.

8. Manual Receipts for Program Income

Under the old system, any available program income would appear automatically during the Create Drawdown process to allow the user to apply the income to the voucher. In the new system, you need to manually fund an activity with program income before creating a program income voucher.

9. Reports

The Reports module is one of the biggest changes to the new system. Some of the most significant changes include:

- Clean formatting (no need to use macro to get a printable copy)
- Ability to export directly to Excel or PDF format.
- The reports are refreshed each night based on the data entered during the day. Information entered into the system does not appear on the reports until the next day.