

The Integrated Disbursement and Information System (IDIS) can be challenging to navigate, especially for new users. ICF experts have assembled this list of 16 quick tricks and fixes to make your IDIS experience simpler and more efficient.

1. **Avoid the Mouse.** If you are learning to use IDIS, the best way to navigate throughout the screens is with keyboard commands such as **<Tab>**, **<Enter>**, the directional arrow keys, and the numbered F keys (i.e. **<F4>**) at the top of your keyboard. You can use the mouse, but the key strokes are much faster.
2. **Avoid the Backspace Key.** In IDIS, the backspace key serves the same function as the **<Tab>** key (it will move you to the next field). To delete data, use the arrow keys to position the cursor and then use the **<Delete>** key or simply type over the existing data.
3. **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.
4. **Tweak your Browser Settings.** Internet Explorer (as opposed to Netscape) is now the recommended browser for IDIS. Some grantees experience a significant delay when moving from one screen to the next. Some Internet Explorer users may realize significant increases in speed by making the following change to their browser settings: Go to Tools-Internet Options in the browser's main menu. Under the Advanced Tab, scroll down to HTTP 1.1 settings and make sure that "Use HTTP 1.1. through proxy connections" is checked.
5. **Resynchronize.** If there is a significant delay when moving from one screen to the next (anything longer than twenty seconds), click on the Resynchronize button located on the right side of the screen. The Resynchronize button will refresh the screen so that you can continue.
6. **When in Doubt, press <Enter>.** If you are unsure about how to proceed after finishing a screen, press the **<Enter>** key. In most cases, the **<Enter>** key will save the data entered on the current screen and move you to the next screen. If this doesn't happen, look at the bottom of the screen for an error message or for a prompt explaining how to continue.
7. **Log In Properly.** You will have two sets of IDs and passwords. The first set is called the Web ID and password and the second set is called the IDIS ID and password.
 - ❖ The Web ID and password never change. The Web ID will start with the letters "wi". The Web password will start with your initials and end with the last four digits of your social security number. Remember that both the Web ID and password are lower case.
 - ❖ The IDIS ID will never change but your IDIS password does change. You will be prompted to change your IDIS password every 90 days. Your IDIS password must be between 6 to 8 characters long (letters or numbers) and it cannot be the same as your last three passwords.
8. **Log Out Properly.** If you close the IDIS window without logging out properly, the system will think you are still logged in. This prevents you from logging back into the system for approximately 15 to 30 minutes. To log out properly and avoid this problem, use the X in the IDIS Main Menu.
9. **Maximize the Internet Browser Window.** When using IDIS, maximize the internet browser window so you can see the messages (such as "Data Saved Successfully") and the list of available F keys. If you have to use the scroll bar to see the messages at the bottom of the IDIS screen and the F keys, your browser window is too small. Internet Explorer users can utilize View-Full screen from the browser's menu to maximize the screen.

10. **Update and Complete Activities on a timely basis.** Almost all grantees have had to clean up or fix old and incomplete data. Data clean-up can take up to ten times longer than entering the data correctly the first time. Develop a schedule for updating and completing activities. A monthly or quarterly schedule works for most grantees.
11. **Log in and Generate IDIS reports once a month.** This is a good idea for several reasons. If you do not log in for 45 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.
12. **Join the IDIS ListServ.** The IDIS ListServ is a mailing list community of users throughout the country. If a member has a question, they can post it to the ListServ where other members can provide assistance. It is an active list used by many experienced users and novices alike. In addition to IDIS issues, grantees also share information on other HUD topics.
13. **Copy and Paste.** Users of Internet Explorer can “copy and paste” between IDIS and any other Windows application. When copying a paragraph of text into multiple lines in IDIS, you will have to insert manual line breaks or the text will not wrap to the next line.
14. **Print Screens for your Project Files.** Internet Explorer users can print IDIS screens by going to File-Print in the browser’s main menu. Netscape users must click the Resynchronize button first (it is located to the right of the IDIS screen), then go to File-Print in the browser’s main menu. Some grantees purchase Screen-print software for IDIS.
15. **Use the HOME Setup and Completion Forms.** Appendix F of the IDIS Reference Manual contains forms that collect data on the set up and completion of HOME projects. The HOME screens in IDIS were based on these forms. Filling in the form first will make the data entry process easier.
16. **Use the Grantee Activity Number.** The Grantee Activity Number is an optional field on the first screen of the Activity Path. It provides the user an opportunity to enter a local accounting, finance, contract, purchase order or project number so that the data in IDIS can be tied to a local database or filing system. By using this field, a grantee can more easily reconcile IDIS data with local data by using the Excel BOSMAC macro to format the Grantee Summary Activity Report (PR08). Alternatively, some grantees will add a data field to their local accounting system where they can enter the HUD Activity Number (if your system does not allow the addition of a new field, you may try to include the HUD Activity Number in an existing field such as “Note” or “Description”.)

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