



Executive Office of Housing
and Economic Development

**Massachusetts Housing Development Management Information
System (HDMIS)**

HDMIS

Department of Housing and Community Development

User Registration Guide

April 2013

This user guide gives a general overview of HDMIS user registration. HDMIS is used by Department of Housing and Community Development (DHCD) sponsors to create/submit loan applications, manage projects, and submit reports.

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1. HDMIS System Requirements

The Massachusetts DHCD (DHCD) HDMIS is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

1.a. Operating System

DHCD HDMIS is designed for both of the two more common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing HDMIS from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

1.b. Internet Connection

HDMIS is a web site designed for access via the Internet. For purpose of accessing HDMIS, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact the network administrator.

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.7 and above, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The HDMIS system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.

1.e. Microsoft Word Viewer

HDMIS has a combination of both Microsoft Word and PDF documents. Microsoft Word increases HDMIS formatting options and reduces the amount of empty space on printed pages. If MS Word is not installed, MS Word Viewer is available for download at www.microsoft.com.

2. Grantee User Types

There are eight types of Sponsor security roles:

- Sponsor Administrator
- Sponsor Project Manager
- Sponsor Project Writer
- Sponsor Architect
- Sponsor Consultant
- Sponsor Financial/Accountant
- Sponsor Legal
- Sponsor Management Agent

These roles have different security levels needed to access Pre-Applications, OneStops, Requisition Reports, etc. Once a Sponsor Administrator is identified and a new user account is created, the Sponsor Administrator can select and enter the organization's staff member names into HDMIS. Staff members, assigned by a Sponsor Administrator, are given the role of staff. The eight security roles are summarized below:

2.a. Sponsor Administrator

- Creates new user accounts (DHCD will then validate this security role)
- Adds new users to HDMIS and assigns organization staff to appropriate roles
- Assigns organization staff to appropriate documents
- Edits and/or deletes user account information
- Views, applies for, and submits Pre-Application and OneStop
- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop
- **This role must be managed by DHCD. A Sponsor Administrator cannot assign another user as a Sponsor Administrator.**

2.b. Sponsor Project Manager

- Views and applies for Pre-Application and OneStop
- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop
- CAN NOT Submit

2.c. Sponsor Project Writer

- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop

2.d. Sponsor Architect

- Enters, updates, and deletes information on Pre-Application and OneStop

- Downloads and attaches files to Pre-Application and OneStop

2.e. Sponsor Consultant

- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop

2.f. Sponsor Financial/Accountant

- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop

2.g. Sponsor Legal

- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop

2.h. Sponsor Management Agent

- Enters, updates, and deletes information on Pre-Application and OneStop
- Downloads and attaches files to Pre-Application and OneStop

3. System Access

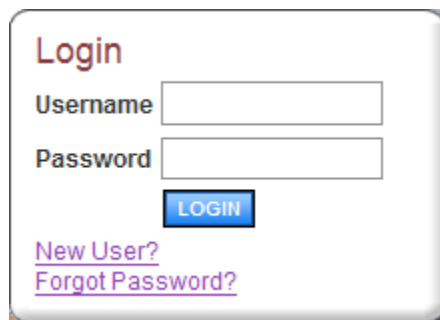
There are two ways to access HDMIS:

1. Request access to HDMIS via the HDMIS Login page and get approved by a DHCD HDMIS system administrator
-OR-
2. When an organization already has an approved HDMIS Sponsor Administrator account, obtain access from the organization's Sponsor Administrator. This is the preferred way to access HDMIS – it is quick and provides greater security for the organization's records.

3.a. Sponsor Administrator Access

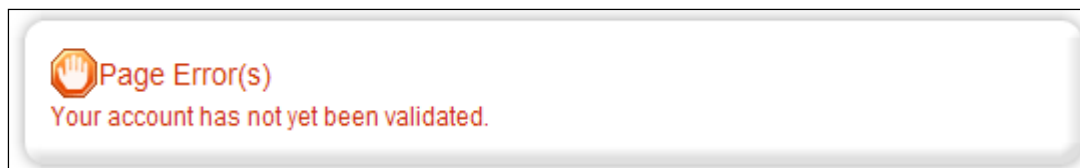
To gain access to HDMIS as a Sponsor Administrator, first create a new user account.

From the HDMIS Home page select "New User?" located in the Login section.



1. Fill in the Contact Information as required. All items marked with an * are required
 - a. The "Username" field can consist of letters and numbers
 - b. The "Password" field can consist of letters and numbers and must be between 7-20 characters
 - c. The fields "Password" and "Confirm Password" must match
 - i. Special characters are allowed in the password
2. Save

After saving the new user information, the account will be validated by a DHCD HDMIS system administrator. If attempting to access the system before validation, the following message will appear:



When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as a Sponsor Administrator, the user will now be able to create additional user accounts for the organization.

Note: Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, a Sponsor Administrator must assign the user to each individual form/document using the "Add/Edit People" option located within each document. On the document's main menu, under "Access Management Tools," "View Management Tools," select "Add/Edit People."

3.b. Staff Access

The preferred method for gaining access to HDMIS is to have the organization's Sponsor Administrator add new users to the system.

To add a staff person to an organization:

1. Select "Organization(s)"
2. Select "Organization Members"
3. Select "Add Members."

The screenshot displays the HDMIS web application interface. At the top, there is a header for the 'Executive Office of Housing and Economic Development' with navigation links for Home, Pre-Applications, OneStops, and Milestone & Sandbox Versions. Below this, there are links for Reports, Training Materials, Organization(s), Profile, and Logout. A 'SAVE' and 'SHOW HELP' button is visible in the top right corner.

The main content area shows the 'Organization - Boston Celtics' page. A 'Back' link is present. Below the organization name, there are instructions on how to add, remove, or modify organization members. There are three tabs: 'Organization Information', 'Organization Members' (which is highlighted with a red box), and 'Organization Documents'.

Under the 'Organization Members' tab, there is a section titled 'Organization Members' with instructions for administrators. Below the instructions, there are two tabs: 'Current Members' and 'Add Members' (which is highlighted with a red box).

At the bottom of the page, there is a search and filter section. It includes a 'Sort By' dropdown menu, a search input field, and a 'GO' button. Below this is a table with the following columns: Person, Role, Active Dates, Active Documents, Assigned By, and Modified By.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Pierce, Paul	Sponsor Administrator	4/9/2013 - <input type="text"/>		SysAdmin, Agate	4/9/2013

4. A person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.

Person Search

<input type="checkbox"/> Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Davis IA, Craig	Sponsor Architect	4/10/2013 - <input type="text"/>			
<input type="checkbox"/> Davis Jr., Mr. Bryan	Sponsor Architect	4/10/2013 - <input type="text"/>			
<input type="checkbox"/> Davis, Agnes	Sponsor Architect	4/10/2013 - <input type="text"/>			
<input type="checkbox"/> Davis, Agnes	Sponsor Architect	4/10/2013 - <input type="text"/>			
<input type="checkbox"/> Davis, Kristin	Sponsor Architect	4/10/2013 - <input type="text"/>			

- Place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names.

Person Search

<input type="checkbox"/> Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Davis IA, Craig	Sponsor Architect	4/10/2013 - <input type="text"/>			

- If the person's name does not come up in the search results, then select "New Member."

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

7. Enter information for the new user and "Save & Add to Organization."

The screenshot shows the web application interface for the Executive Office of Housing and Economic Development. The header includes the organization's logo and name, along with navigation links for Home, Pre-Applications, OneStops, and Milestone & Sandbox Versions. A secondary navigation bar contains Reports, Training Materials, Organization(s), Profile, and Logout. Two buttons, 'SAVE & ADD TO ORGANIZATION' and 'SHOW HELP', are visible in the top right.

The main content area is titled 'Organization - Boston Celtics' and includes a 'Back' link. Below the title, there are instructions and links for 'Organization Information', 'Organization Members', and 'Organization Documents'. The 'Add/Edit Members' section provides a list of steps for administrators and a form to complete member information. The form fields include Name (Prefix, First, Middle, Last, Suffix), Title, Email, Username, Password, Confirm Password, Date Active, Date Inactive, and Role. Below this, a section explains that fields are populated with organization information by default and can be edited. This section includes fields for Address, City, State, Zipcode, County, Phone #1, Phone #2, Fax, Cell Phone, and Website.

Organization - Boston Celtics
 Follow the instructions listed below to add/remove/modify organization members.
[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Add/Edit Members
 Administrators with the authority to add members to your organization can follow these steps:
 Please complete the information below. All required fields are marked with an *.

Name
 Prefix: [dropdown] First: [text] * Middle: [text] Last: [text] * Suffix: [dropdown]

Title: [text]

Email: [text] *

Username: [text] *

Password: [text] * **Confirm Password**: [text] *

Date Active: 4/10/2013 **Date Inactive**: [text]

Role: [dropdown] *

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their Profile page.

Address: TD Garden *

City: Boston * **State**: Massachusetts * **Zipcode**: 02114 *

County: Suffolk County *

Phone #1: (123) 456-7890 * **Phone #2**: [text]

Fax: [text] **Cell Phone**: [text]

Website: [text]

4. Login Page

4.a. Accessing HDMIS

To access HDMIS, enter <http://www.madhcd.intelligrants.com> into the address bar of a web browser. The page looks like the image below.

Note: HDMIS does not save the username and password. This option *may* be available on the browser.



4.b. Bookmark/Favorites

HDMIS may be bookmarked, or added, to the favorites menu

After accessing the HDMIS Login page, on the Internet Explorer (IE) menu bar:

1. Select "Favorites"
2. Select "Add to Favorites"
3. Rename the site, if desired
4. Select "Add"

4.c. Adding HDMIS to List of Trusted Sites

To avoid various browser-related restrictions unnecessarily placed on HDMIS, make the following changes to the web browser.

If using Internet Explorer, we recommend adding the DHCD HDMIS Home page to the list of trusted sites as follows:

1. Select "Tools"
2. Select "Internet Options"
3. Select "Security"
4. Select "Trusted sites"
5. Select "Sites"
6. In "Add this website to the zone:" enter: <http://www.madhcd.intelligrants.com>
7. Select "Add"
8. Select "Close" and then "OK"

5. User Contact Information

5.a. Updating User Profile

It is important to keep contact information up-to-date. This may be done quickly and easily in HDMIS.

By keeping records current, DHCD staff members are able to easily contact users when a need arises. This is especially important for timely messaging. When system messages are sent from HDMIS, they are sent to the e-mail address in the user profile. **When an incorrect e-mail address is in the contact information, automatic notifications will not be received.** Also, in the event of a forgotten password, the e-mail address is required and must match the one listed in the contact information.

Update the profile at any time by:

1. From the Home page, select "Profile"
2. Update the form with current information
3. Select "Save"

The screenshot shows the 'Profile' page in the HDMIS system. At the top, there is a navigation bar with links for Home, Pre-Applications, OneStops, Milestone & Sandbox Versions, Reports, Training Materials, Organization(s), Profile (highlighted with a red box), and Logout. Below the navigation bar are buttons for SAVE and SHOW HELP (also highlighted with a red box). The main content area is titled 'Profile' and includes a 'Back' link. A note states: 'Please complete all the required fields below. Required fields are marked with an *.' The 'Contact Information' section contains the following fields: Name (Prefix: dropdown, First: Paul, Middle: empty, Last: Pierce, Suffix: dropdown), Display Name, Organization, Title (Small Forward), Address (TD Garden), City (Boston), State (Massachusetts), Zipcode (02114), County (Suffolk County), Phone #1 ((123) 456-7890), Phone #2, Fax, Cell Phone, Email (cdavis@agatesoftware.com), Website, Username (paulpierce), Password, and Confirm Password. The 'Organization Information' section contains a table with the following data:

Organization	Role	Active Dates	Assigned By
Boston Celtics	Sponsor Administrator	04/09/2013 - open ended	SysAdmin, Agate

5.b. Updating Another User's Contact Information

An organization's Sponsor Administrator may edit another user's contact information as follows:

1. Select "Organization(s)" and then select the organization whose member(s) to edit

[Back](#)

Organization - Boston Celtics

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | **[Organization Members](#)** | [Organization Documents](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
To add a member to your organization, select the **Add Members** link below.
If a member has already added his/her information in the system, you can search for the member.
If you need to add a member's information into the system, select **New Member**.
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- -----SELECT-----

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Pierce, Paul	Sponsor Administrator	4/9/2013 - <input type="text"/>		SysAdmin, Agate	4/9/2013

2. Select "Organization Members"
3. Select the name of the person whose contact information to change
4. Update accordingly and "Save"

5.c. Updating Organization Information

When an organization's contact information changes, it is important to update the system.

The screenshot shows the web interface for updating organization information. At the top, there is a blue header with the logo of the Executive Office of Housing and Economic Development and navigation links: Home, Pre-Applications, OneStops, Milestone & Sandbox Versions, Reports, Training Materials, Organization(s), Profile, and Logout. Below the header are buttons for SAVE and SHOW HELP. The main content area has a 'Back' link and the title 'Organization - Boston Celtics'. A note states: 'Please complete all the required fields below. Required fields are marked with an *.' Below this are three links: Organization Information, Organization Members, and Organization Documents. The 'Organization Information' section contains the following fields:

Domain	MADHCD	*
Name	Boston Celtics	*
Short Name	Boston Celtics	*
Address	TD Garden	*
City	Boston	*
State	Massachusetts	*
Zipcode	02114	*
County	Suffolk County	*
Phone	(123) 456-7890	*
Fax		
Email		
Website		

There may be links within "Organization Information" that require additional information. If these links exist, select the links and fill out the required information. An example of such a link might be, "Mailing Address."

5.d. Deactivating a User

A Project Director can deactivate a member of his/her organization. A deactivated user cannot access or edit proposal-related information. To deactivate a user:

1. If there is more than one organization, then first select the one to edit
2. Select "Organization Members"
3. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user to have access will no longer have access
4. Select "Save"

The screenshot shows a web interface for user management. At the top, there is a search bar labeled "Person Search" with the text "Davis" entered. To the right of the search bar are two buttons: "SEARCH" and "NEW MEMBER". Below the search bar is a table with the following columns: "Person", "Role", "Active Dates", "Active Documents", "Assigned By", and "Modified By". The first row of the table contains the following data: "Davis IA, Craig" (with a small icon to the left), "Sponsor Architect" (with a dropdown arrow), "4/10/2013", and an empty text box. The empty text box is highlighted with a red border.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/> Davis IA, Craig	Sponsor Architect	4/10/2013			