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
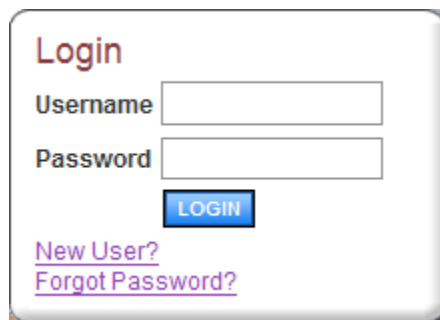- Downloads and attaches files to Pre-Application and OneStop
- **This role must be managed by DHCD. A Sponsor Administrator cannot assign another user as a Sponsor Administrator.**

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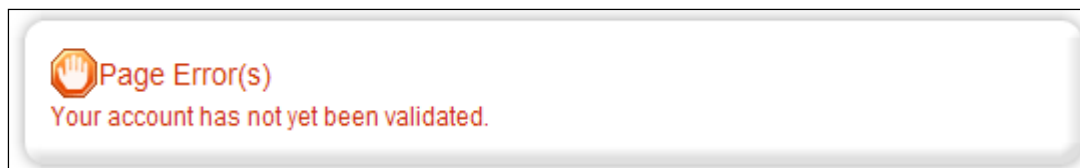
When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as a Sponsor Administrator, the user will now be able to create additional user accounts for the organization.

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."

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

5. 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.

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

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

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"

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

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.

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"

Person Search Davis	SEARCH	NEW MEMBER				
☐ **Person**	**Role**		**Active Dates**	**Active Documents**	**Assigned By**	**Modified By**
☐ Davis IA, Craig	Sponsor Architect ▼		4/10/2013 –			