

iMAX

USER'S

MANUAL

Tenant Rental Assistance Certification System (TRACS)
Integrated Multifamily Access eXchange (iMAX) System

U.S. Department of Housing and Urban Development

March 2009

Revision Sheet

| Release No. | Date | Revision Description |
|--------------------|-------------|--|
| Rev. 1 | 3/21/08 | Draft User Manual |
| Rev. 2 | 5/9/08 | Final User Manual |
| Rev. 2.1 | 5/12/08 | Updated sections 3.1 and 4.2.6.3 with screen shots. |
| Rev. 3 | 11/7/08 | Updated sections |
| Rev. 3.1 | 1/5/09 | Minor revisions to 2.2 and figure in 4.3.2; other minor edits |
| Rev. 3.2 | 1/15/09 | Minor revisions upon review of PDF version by HUD TRACS Proj. Mgr. |
| Rev. 3.3 | 2/13/09 | Revisions from HUD TRACS Proj. Mgr. |
| Rev. 3.4 | 2/25/09 | Revisions from HUD TRACS Proj. Mgr. |
| Rev 3.5 | 3/27/09 | Additions to Appendix A |



User's Manual Authorization Memorandum

I have carefully assessed the User's Manual for the Integrated Multifamily Access Exchange (iMAX). This document has been completed in accordance with the requirements of the HUD System Development Methodology.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

James Legge
HUD IT Project Manager

DATE

Deatrie M. Perry
TRACS Project Manager

DATE

John J. Curry Jr.
Housing Program Manager

DATE

iMAX USER'S MANUAL

TABLE OF CONTENTS

| | <u>Page #</u> |
|--|---------------|
| 1.0 GENERAL INFORMATION | 1-1 |
| 1.1 System Overview..... | 1-1 |
| 1.2 Project References | 1-2 |
| 1.3 Authorized Use Permission | 1-2 |
| 1.4 Points of Contact..... | 1-2 |
| 1.4.1 Information | 1-2 |
| 1.4.2 Coordination | 1-3 |
| 1.4.3 Help Desk..... | 1-3 |
| 1.5 Organization of the Manual..... | 1-3 |
| 1.6 Acronyms and Abbreviations | 1-4 |
| 2.0 SYSTEM SUMMARY..... | 2-1 |
| 2.1 System Configuration..... | 2-1 |
| 2.2 Data Flows..... | 2-2 |
| 2.3 User Access Levels | 2-2 |
| 2.3.1 Assigning iMAX Roles to Users..... | 2-2 |
| 2.4 Contingencies and Alternate Modes of Operation | 2-6 |
| 3.0 GETTING STARTED..... | 3-1 |
| 3.1 Logging On..... | 3-1 |
| 3.2 System Menu | 3-3 |
| 3.2.1 iMAX User Broadcasts | 3-3 |
| 3.2.2 iMAX User Transmissions | 3-3 |
| 3.2.3 iMAX User Profile | 3-3 |
| 3.3 Changing Password | 3-4 |
| 3.4 Exit System..... | 3-4 |
| 4.0 USING the SYSTEM | 4-1 |
| 4.1 iMAX User Broadcasts..... | 4-1 |
| 4.2 iMAX User Transmissions | 4-1 |
| 4.2.1 Upload | 4-1 |
| 4.2.2 Sent to TRACS | 4-2 |
| 4.2.3 Received from TRACS | 4-2 |
| 4.2.4 Sent to Others..... | 4-2 |
| 4.2.5 Received from Others..... | 4-3 |
| 4.3 iMAX User Profile | 4-3 |
| 4.3.1 Change Password..... | 4-3 |

| | | |
|------------|--|-----|
| 4.3.2 | Profile Management..... | 4-3 |
| 4.4 | Special Instructions for Error Correction..... | 4-4 |
| 4.5 | Caveats and Exceptions..... | 4-4 |
| 5.0 | <i>QUERYING</i> | 5-1 |
| 5.1 | Query Capabilities..... | 5-1 |
| 5.2 | Query Procedures..... | 5-1 |
| 6.0 | <i>REPORTING</i> | 6-1 |
| 6.1 | Report Capabilities..... | 6-1 |
| 6.2 | Report Procedures..... | 6-1 |
| Appendix A | <i>STATUS MESSAGES</i> | A-1 |

1.0 GENERAL INFORMATION

1.0 GENERAL INFORMATION

1.1 System Overview

The Tenant Rental Assistance Certification System (TRACS) is designed to process subsidy contracts, tenant rental assistance information, and owner requests for payment (vouchers). TRACS collects tenant data and voucher data for project-based programs and authorizes payment for subsidy programs. Payments are based upon the voucher, contract, and tenant data residing in the system. Owner Agents are required to meet the Compliance Rule of 2003, which requires the submission of their current and active certifications (tenant data) under contract in order to receive subsidy payments. The integrated Multifamily Access eXchange (iMAX) system provides a replacement for the current TRACSMail system, enabling electronic submissions of certifications and vouchers into the TRACS system and storing all submission related data in an Oracle 10g data base.

iMAX is a web-based communication system that provides Contract Administrators (CAs) and Owner Agents (OAs) who have subsidy contracts with HUD to transmit to HUD and to other OAs and CAs registered with iMAX, tenant data and voucher data files. Files sent to HUD are logged, processed, and submitted to TRACS for payment processing by iMAX. iMAX also receives TRACS processing results and makes these results available to the external business partners of HUD.

iMAX provides two forms of access, a graphical user interface and a system-to-system communication interface. The graphical user interface is accessible through the Web Access Secure Systems (WASS) gateway at HUD. The system-to-system communication interface is available for software vendors of CAs and OAs. The system-to-system communication interface provides the same set of functionality as the graphical user interface.

The new iMAX system will keep all functions of the existing TRACSMail system. In addition, it acknowledges Monthly Activity Transmission (MAT) file submissions in a real-time manner with a unique transaction ID, which can be used later for audit log searches. The iMAX system also keeps audit logs for all MAT requests, TRACS responses, and other processing events. The iMAX system will utilize J2EE/web technologies. One of the benefits of the J2EE/web technology is that end users do not need to install any additional software. All the user needs is a work station, a web browser, and internet connection. In addition, file submission/ download and user profile management are integrated seamlessly into the web interface so that end users do not need to go to different applications for file management and user management. Administration of the system will be much easier from the web application as audit logging and user management are integrated.

| | |
|---------------------------------|---|
| Responsible Organization | Multifamily Housing Program Support Division |
| System Name | Integrated Multifamily Access Exchange (iMAX) |
| System Code | F87 |
| PCAS Number | 25178 |
| System Category | Client Server |
| Operational Status | Under Development / Pilot Phase |
| System Environment | Oracle 10g, Java 1.5.x, SOAP 1.2, J2EE 1.5 |

1.2 Project References

The following table identifies any existing regulations, standards, or documents that are pertinent to the iMAX project.

| Reference | Date |
|--|-------|
| HUD System Development Methodology 6.02 | 9/04 |
| iMAX – Initiate Phase – Needs Statement | 10/07 |
| iMAX – Define Phase – Functional Requirements Document | 01/08 |
| iMAX User Guide | 02/09 |

1.3 Authorized Use Permission

Misuse of Federal Information through the HUD Secure Connection web site falls under the provisions of Title 18, United States Code, Section 1030. This law specifies penalties for exceeding authorized access, alterations, damage, or destruction of information residing on Federal Computers. System Administrators have access to an audit trail database that records the details of access by users.

1.4 Points of Contact

1.4.1 Information

The following is a list of the iMAX points of organizational contact (POCs) that may be needed for informational and troubleshooting purposes.



Users should always contact the Multifamily Help Desk first (see below).

| Role | Location | Phone |
|--|---|--|
| Multifamily Help Desk | U.S. Department of Housing and Urban Development 451 7 th St. SW Washington, DC 20410 | (800) 767-7588 tracs@hud.gov |
| Deatrie Perry TRACS Project Manager | U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 6118 Washington, DC 20410 | (202) 708-0614 Ext. 2300 Deatrie.M.Perry@hud.gov |
| John Curry Housing Program Manager | U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 6118 Washington, DC 20410 | (202) 708-4135 Ext. 2910 John.J.Curry@hud.gov |

| Role | Location | Phone |
|---|--|--|
| James Legge Government Technical Monitor (GTM)/HUD Project Manager | U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 2262 Washington, DC 20410 | (202) 708-0614 Ext. 7485 James.H.Legge@hud.gov |
| Lanier Hylton Program Area/Sponsor Representative | U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 6151 Washington, DC 20410 | (202) 708-2677 Ext. 2510 Lanier.M.Hylton@hud.gov |

1.4.2 Coordination

The iMAX project required coordination with various organizations, both government and non-government, to accomplish the tasks throughout the system development life cycle. The table below lists these organizations, the coordination date and the phases in which Multifamily Housing coordinated tasks with these organizations.

| Organization | Coordination Date | Support Function (Phase) |
|---|---------------------|--|
| Office of Multifamily Housing | 08/09/07 – 10/08/08 | Participate in Project Initiation, Requirements Definition, and User Acceptance Test activities. |
| HUD-IT Test Center | 05/06/08 – 10/08/08 | Implementation Coordination, Installation, Deployment |
| Industry users | 08/09/07 – 10/08/08 | Performs verification and field-testing of software prior to releases being installed into production. |
| HUD Information Technology Service (HITS) | 11/27/07 – 10/08/08 | Provides support for web application and database servers and performs all production releases. |

1.4.3 Help Desk

The Multifamily Helpdesk will be responsible for responding to any user questions or concerns. The Multifamily Helpdesk can be contacted by phone at 1-800-767-7588 or email at tracs@hud.gov.

1.5 Organization of the Manual

1.0 General Information

This section provides the user with an overview of the iMAX project. It describes the system and provides a list of contacts, references, and acronyms and abbreviations.

2.0 System Summary

This section discusses the technical aspects of the iMAX system, while paying specific attention to data flows, configuration, and user access levels.

3.0 Getting Started

This section discusses how the user logs on to the iMAX system, changes the login password, and also provides a menu for all the different aspects of the system.

4.0 Using the System Online

This section discusses all of the different uses of the iMAX system for users and administrators. It goes into detail with step by step instructions for each function.

5.0 Querying

This section discusses the querying and retrieval capabilities of the iMAX system.

6.0 Reporting

This section does not apply to the iMAX system since it does not contain this feature.

Appendix A: Status Messages

This section explains the system's status messages.

1.6 Acronyms and Abbreviations

The following table defines acronyms and abbreviations used throughout this document:

| ACRONYM | Definition |
|----------------|---|
| CA | Contract Administrator |
| IG | Inspector General |
| iMAX | Integrated Multifamily Access Exchange |
| MAT | Monthly Activity Transmission |
| OA | Owner Agent |
| SOAP | Simple Object Access Protocol |
| TRACS | Tenant Rental Assistance Certification System |
| WASS | Web Access Secure Sub-systems |

2.0 SYSTEM SUMMARY

2.2 Data Flows

The iMAX user can upload files via the web browser or via vendor software that calls iMAX web services. iMAX routes the files to the appropriate iMAX user or to a staging area to send to TRACS. iMAX combines the files and adds header information. The mainframe pulls via FTP all files off the iMAX server. TRACS processes the files during the nightly cycle and returns response files via FTP to iMAX. iMAX then parses the files and routes to the appropriate iMAX users.

2.3 User Access Levels

HUD policy requires entities communicating electronically with HUD that are outside of HUD's network be authenticated. Business partners wishing to communicate with HUD electronically are required to be registered and receive HUD business partner credentials, which is a WASS ID and password. You can register with HUD's security services at HUD Secure Systems to receive the user ID and password. These credentials are required for each individual that does business with HUD. To register, go to the following web site: https://hudapps.hud.gov/public/wass/public/participant/partreg_page.jsp.

Whether communicating through a browser to access HUD resources or communicating directly with iMAX, clients will need to provide their credentials. Once a client is authenticated, depending on the system, the client may be asked to provide system-specific user credentials. All communications to iMAX require that the client also provide an iMAX user ID and password, previously known as the TRACSMail user ID and password. The iMAX ID and password are available to a business entity rather than an individual.

2.3.1 Assigning iMAX Roles to Users

If you are a WASS Coordinator and want to assign the iMAX role to a user, follow the steps below.

1. Log in to WASS (see figure below).

User Login help | home

Secure Systems Top of Form
Single Sign On

User ID

Password

Bottom of Form

ATTENTION: This computer system, and all the systems associated with this system for User Authorization and Authentication, are protected by a computer security system; unauthorized access to these systems is not permitted; and usage may be monitored.

NOTE: There is an inactivity timeout of 30 minutes. Please save your work periodically to avoid being logged out. Please also note that there is a 4 hour session timeout, after which, you will need to re-authenticate. You can then resume where you left off.

Content updated March 2, 2007

U.S. Department of Housing and Urban Development
 451 7th Street S.W., Washington, DC 20410
 Telephone: (202) 708-1112 TTY: (202) 708-1455

[Home](#) | [Privacy Statement](#)

The WASS main menu displays (see figure below).

Main Menu help | search | home | logout

Secure Systems

Welcome HWEYHUA JANE

system administration

- Assistance Contract Assignment Maintenance
- Business Partners Maintenance
- Property Assignment Maintenance
- User Maintenance

systems

- Financial Assessment Submission - PHA (FASPHA)
- Financial Assessment Subsystem - Multifamily Housing (FASS)
- Integrated Multifamily Access eXchange (iMAX)
- iMAX Administration
- Mark-to-Market (M2M)
- Management Assessment Subsystem (MASS)
- Multifamily Delinquency and Default Reporting System (MDDR)
- Public Housing Assessment System: Scores and Status (NASS)
- Physical Assessment Subsystem (PASS)

Systems

- Financial Assessment Submission - PHA (FASPHA)
- Financial Assessment Subsystem - Multifamily Housing (FASS)
- Integrated Multifamily Access eXchange (iMAX)
- iMAX Administration
- Mark-to-Market (M2M)
- Management Assessment Subsystem (MASS)
- Multifamily Delinquency and Default Reporting System (MDDR)
- Public Housing Assessment System: Scores and Status (NASS)
- Physical Assessment Subsystem (PASS)
- Quality Assurance Subsystem (QASS)
- Resident Assessment Subsystem (RASS)
- Integrated Real Estate Management System (IREMS)
- Tenant Rental Assistance Certification System (TRACS)

System Administration

- Assistance Contract Assignment Maintenance
- Business Partners Maintenance
- Property Assignment Maintenance
- User Maintenance

- Under **System Administration**, click **User Maintenance**. The **User Maintenance** page displays (see figure below).

System Administration help | search | home | logout

User Maintenance

On this form, you can either search for a User by User ID, or search for Users by entering your search criteria.

Search by User ID

To search for a User by User ID, enter a User ID and then click the "Search for User" button.

User ID

Search for User

Search Users

To search for a User, enter a search criteria (optional) and then click the "Search Users" button.

Business Partner - TIN/SSN/PHA ID/IPA ID

First Name

Last Name

☐ Check here to limit search to Independent Users

Search Users Cancel

- On the **User Maintenance** page, in the **User ID** field, enter the User ID of the user to whom you want to assign the iMAX role.

- Click the **Search Users** button. If you entered a correct User ID, the **Maintain User** page displays, with the user's ID in its title (see figure below).

Maintain User M55511

| User Information | |
|------------------|------------------|
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| Coordinator | Yes |
| User Type | Business Partner |

Choose a Function

Business Partners Maintenance ▼

Submit Cancel

- In the **Maintain User** page, from the **Choose a Function** drop-down list, select **Maintain User Profile – Roles** (see figure below).

Maintain User M55511

| User Information | |
|------------------|------------------|
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| Coordinator | Yes |
| User Type | Business Partner |

Choose a Function

Business Partners Maintenance ▼

- Business Partners Maintenance
- Maintain User Information
- Maintain User Profile - Actions
- Maintain User Profile - Groups
- Maintain User Profile - Roles**
- Property Assignment Maintenance
- Resend Letter

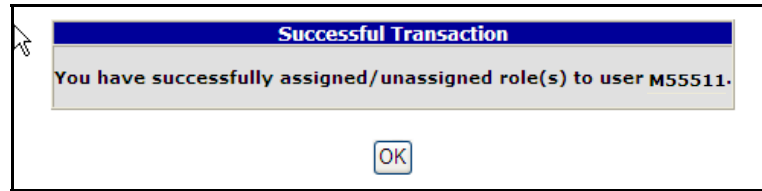
- Click the **Submit** button. The **Assign / Unassign Roles for User** page displays (see figure below).

| User Information | |
|--|--|
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| Coordinator | Yes |
| User Type | Business Partner |
| Please check/uncheck boxes to assign/unassign roles to the user | |
| Disabled roles cannot be unassigned until they are removed in the appropriate Assignment Maintenance screens | |
| IMAX LOCCS TRACS | |
| IMAX - Integrated Multifamily Access Exchange | |
| <input type="checkbox"/> | IME - iMAX (TRACSMail replacement) for externa |
| LOCCS - Line of Credit Control System | |
| <input checked="" type="checkbox"/> | ADM - Administration |
| <input checked="" type="checkbox"/> | QRY - Query |
| <input type="checkbox"/> | REQ - Requisition |
| <input type="checkbox"/> | YES - Year End Settlement |
| TRACS - Tenant Rental Assistance Certification P | |
| <input checked="" type="checkbox"/> | TTQ - TRACS Tenant Query |
| <input checked="" type="checkbox"/> | TVQ - TRACS Voucher Query |

7. Under **IMAX – Integrated Multifamily Access Exchange**, select the check box for **IME – iMAX (TRACSMail replacement)**.
8. Click the **Assign / Unassign Roles** button (see figure below).

| Assign/Unassign Roles for User M55511 | |
|--|--|
| User Information | |
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| Coordinator | Yes |
| User Type | Business Partner |
| Please check/uncheck boxes to assign/unassign roles to the user | |
| Disabled roles cannot be unassigned until they are removed in the appropriate Assignment Maintenance screens | |
| IMAX LOCCS TRACS | |
| IMAX - Integrated Multifamily Access Exchange | |
| <input checked="" type="checkbox"/> | IME - iMAX (TRACSMail replacement) for externa |
| LOCCS - Line of Credit Control System | |
| <input checked="" type="checkbox"/> | ADM - Administration |
| <input checked="" type="checkbox"/> | QRY - Query |
| <input type="checkbox"/> | REQ - Requisition |
| <input type="checkbox"/> | YES - Year End Settlement |
| TRACS - Tenant Rental Assistance Certification P | |
| <input checked="" type="checkbox"/> | TTQ - TRACS Tenant Query |
| <input checked="" type="checkbox"/> | TVQ - TRACS Voucher Query |
| <input type="button" value="Assign/Unassign Roles"/> <input type="button" value="Cancel"/> | |

9. A confirmation message displays (see figure below). Click **OK**.



2.3.2 Assigning the iMAX Coordinator Action for WASS Coordinators ONLY

1. Follow steps 1 – 4 in the previous section 2.3.1. If you entered a correct User ID, the **Maintain User** page displays, with the user's ID in its title (see figure below).
2. On the **Maintain User** page, from the **Choose a Function** drop-down list, select **Maintain User Profile – Actions** (see figure below).

A screenshot of the 'Maintain User M55511' page. The title is 'Maintain User M55511' in red. Below the title is a table with user information. Below the table is a 'Choose a Function' section with a drop-down menu. The drop-down menu is open, showing a list of functions. The function 'Maintain User Profile - Actions' is highlighted in blue.

| User Information | |
|------------------|-------------------|
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| User Type | Internal Internet |

Choose a Function

- Assistance Contract Assignment Maintenance
- Assistance Contract Assignment Maintenance
- Maintain User Information
- Maintain User Profile - Actions**
- Maintain User Profile - Groups
- Maintain User Profile - Roles
- Property Assignment Maintenance
- Reset User Password

3. Click the **Submit** button. The **Assign / Unassign Action for User** page displays (see figure below).

| User Information | |
|------------------|------------------|
| User ID | M55511 |
| First Name | JOHN |
| Middle Initial | J |
| Last Name | DOE |
| User Status | Active |
| Coordinator | Yes |
| User Type | Business Partner |

Please check/uncheck boxes to assign/unassign actions to the user

[ADM](#) | [EIV](#) | [IMAX](#) | [IMAXA](#) | [TRACS](#)

| ADM - Administration of Secure Systems | |
|--|---|
| <input type="checkbox"/> | ACA - Assistance Contract Asgmt |
| <input type="checkbox"/> | ACU - Contract Administrator Update |
| <input checked="" type="checkbox"/> | COR - Coordinator |
| <input type="checkbox"/> | NPU - National Participant Update |
| <input checked="" type="checkbox"/> | ASG - Property Assignment |
| <input type="checkbox"/> | PWD - TAC - REAC Only |
| <input type="checkbox"/> | RST - TAC - REAC Only Reset Password |
| <input type="checkbox"/> | MOT - Update Message Of the Day |
| <input type="checkbox"/> | ACV - View Assistance Contract Assignment |

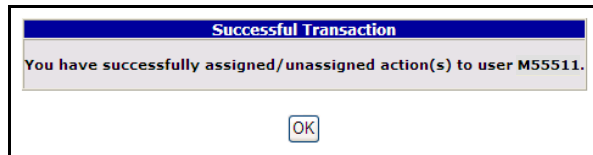
| EIV - Enterprise Income Verification | |
|--------------------------------------|--------------------------|
| <input type="checkbox"/> | COR - Coordinator |
| <input type="checkbox"/> | EIV - EIV Access |
| <input type="checkbox"/> | UCE - User Certification |

4. Scroll down to the heading **IMAX – Integrated Multifamily Access Exchange** (see figure below).

| | |
|---|--|
| <input type="checkbox"/> | VAR - View Audit Reports |
| <input type="checkbox"/> | VIR - View Income Reports |
| IMAX - Integrated Multifamily Access Exchange | |
| <input type="checkbox"/> | ADM - Administration |
| <input checked="" type="checkbox"/> | COR - Coordinator |
| IMAXA - Integrated Multifamily Access Exchange A | |
| <input type="checkbox"/> | ADM - Administration |
| TRACS - Tenant Rental Assistance Certification P | |
| <input type="checkbox"/> | THQ - PBCA Administered Manual Voucher for Re |
| <input type="checkbox"/> | ADM - Administration |
| <input checked="" type="checkbox"/> | COR - Coordinator |
| <input type="checkbox"/> | QRY - DatabaseQuery |
| <input type="checkbox"/> | TFO - Field Office Payment Actions, cannot han |
| <input type="checkbox"/> | TMV - Manual Voucher Submission and Review |
| <input type="checkbox"/> | TVR - Over/Under Payment Resolution |
| <input type="checkbox"/> | TTR - Set Threshold Amount and Auto Review Rea |
| <input type="checkbox"/> | TSC - Special Claims Create |
| <input type="checkbox"/> | TSD - Special Claims Delete |
| <input type="checkbox"/> | TMO - TRACS Move-out Intranet Application |
| <input type="checkbox"/> | TPR - TRACS Project Re-baseline |
| <input type="checkbox"/> | TVH - Voucher HUB Payment Actions, handle all |

5. Select the check box for **COR - Coordinator**.
6. Click the **Assign/Unassign Actions** button (see figure above).

7. A confirmation message displays (see figure below). Click **OK**.



2.4 Contingencies and Alternate Modes of Operation

Please refer to the TRACS Contingency Plan.

3.0 GETTING STARTED

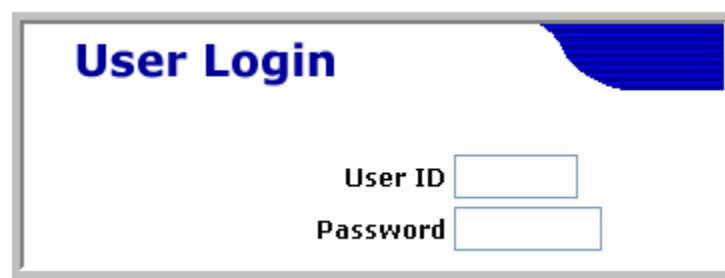
3.0 GETTING STARTED

The system access is controlled using WASS. Logging in with the WASS ID will make the iMAX system available to the user via link.

3.1 Logging On

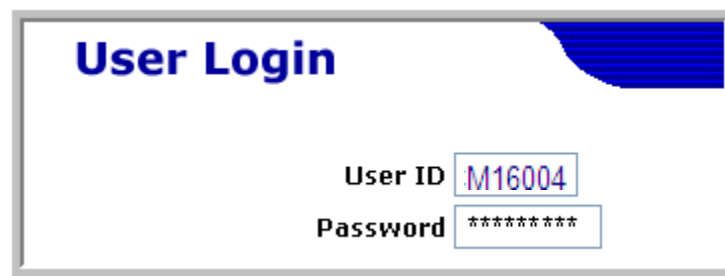
1. Go to the Secure Systems URLs.
 - a) For internal HUD users: <https://hudapps.hud.gov/ssmaster/index.cfm>
 - b) For external users: https://hudapps.hud.gov/HUD_Systems/index.cfm

2. The following screen will appear:



The screenshot shows a web browser window with a title bar. Inside, the page has a blue header with the text "User Login" in white. Below the header, there are two input fields. The first is labeled "User ID" and the second is labeled "Password". Both fields are empty.

3. Type the WASS User ID and Password into the respective fields and select "Login."



The screenshot shows the same "User Login" screen as before, but now the input fields are filled. The "User ID" field contains the text "M16004" and the "Password" field contains a series of asterisks "*****".

4. After logging into WASS, click on the **iMAX Administrator** link in the Secure Systems main menu.
5. The following screen will appear:

Log on

TRACSMail ID

Password

> [Forgot password?](#)

> [Need a TRACSMail ID?](#)

6. Enter your assigned TRACSMail/iMAX User ID and Password.

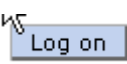
Log on

TRACSMail ID

Password

> [Forgot password?](#)

> [Need a TRACSMail ID?](#)

7. Click  on the right side of the screen and the iMAX main page will be displayed.

iMAX (formerly TRACSMail) Welcome TRACX15692! | Log off

Broadcasts Transmissions Profile

Upload | Sent to TRACS | **Received from TRACS** | Sent to Others | Received from Others

Messages from HUD Administrator
1 - 3 of 5 | [View all messages >>](#)

- > May 9, 2008: Inactive user can not log in to the iMAX user win ...
- > May 9, 2008: This is testing for iMAX admin window. ...
- > May 8, 2008: The iMAX system will be offline from 10:00pm to 2 ...

TRACS Response Files

Requests of

3.2 System Menu

User System Menu

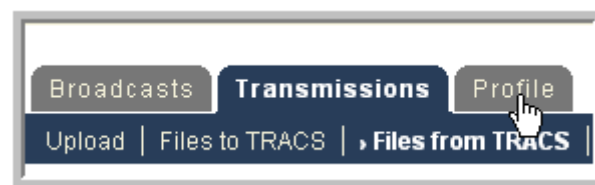
3.2.1 iMAX User Broadcasts

The Broadcasts tab allows the user to view any messages that have been sent from the HUD Administrator. The user can view when the message was sent and can also access previously sent messages. Upon selecting this tab, the user will initially only be able to see the three most recent broadcast messages.



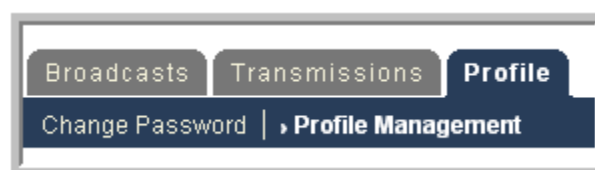
3.2.2 iMAX User Transmissions

The Transmissions tab allows the user to upload and send files to HUD, as well as to other iMAX users (i.e., PBCAs, OAs, and Service Bureaus). This tab also allows the user to view any and all files that have been sent to or received from HUD or any other iMAX user.



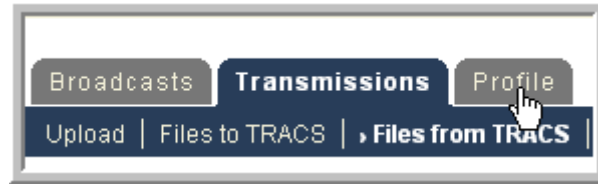
3.2.3 iMAX User Profile

The User Profile tab allows the user to view and make any necessary changes to their iMAX profile or user password.

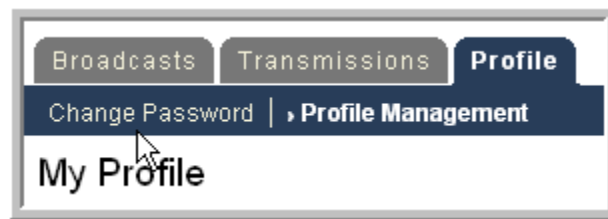


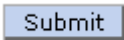
3.3 Changing Password

1. In order to change the password, click on the “Profile” tab from any screen.

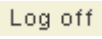


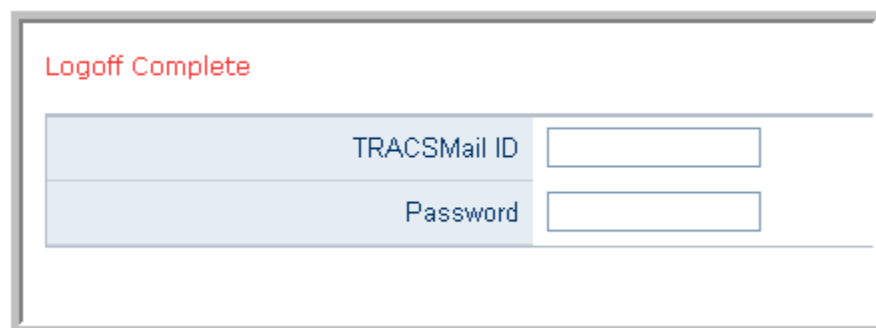
2. The My Profile page will appear. Click on the “Change Password” link in the upper left corner, under the “Broadcasts” tab.



3. Enter the current password, new password, and retype the new password in the required fields. Then click .

3.4 Exit System

1. To log off iMAX, locate the  link in the top right corner of the screen and click it.
2. The system terminates the current user session and displays the Log on page with a message that logoff is completed.



4.0 USING THE SYSTEM (ONLINE)

4.0 USING THE SYSTEM

4.1 iMAX User Broadcasts

1. Select the Broadcasts tab in order to view received administrative broadcast messages.

| Date | Message ID | Message |
|-------------|------------|---|
| May 8, 2008 | 30 | The iMAX system will be offline from 10:00pm to 2:00am EST. |

2. Click on the Previous or Next links to view an earlier or later set of messages.

4.2 iMAX User Transmissions

4.2.1 Upload

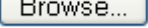
1. Select the Transmissions tab followed by the Upload sub tab.

The screenshot shows a navigation bar with three main tabs: 'Broadcasts', 'Transmissions', and 'Profile'. The 'Transmissions' tab is currently selected. Below it, there is a sub-navigation bar with five options: 'Upload', 'Sent to TRACS', 'Received from TRACS', 'Sent to Others', and 'Received from Others'. The 'Received from TRACS' option is highlighted with a mouse cursor.

2. The system displays the following fields to be filled: Destinations, Subject, and MAT File.



The screenshot shows a form with three input fields. The first field is labeled 'Destinations' and has a text input area. The second field is labeled 'Subject' and also has a text input area. The third field is labeled 'MAT File' and has a text input area with a 'Browse...' button next to it. A mouse cursor is pointing at the 'Destinations' field.

3. In the Destinations field, type in the location where the file or files are being sent. To send the file or files to TRACS, type in TRACMPROD or TRACMTEST. You can also send the file to different iMAX users by typing their iMAX User ID. If you wish to send the file to multiple users, be sure to separate the destinations with a comma followed by a space.
4. In the Subject field, type a brief summary identifying the transmission (just as you would in the subject field of an e-mail).

5. In the MAT File field, select  in order to select which .txt or .mat MAT file you would like to send.




Please be aware that iMAX can only upload .txt or .mat files.

6. At any point in the process you can start over by selecting  on the right hand side of the page.
7. After filling in the required fields, select .

4.2.2 Sent to TRACS

Selecting this tab allows the user to view the files that have been sent to a TRACS destination, either TRACMPROD or TRACMTEST.

| Requests of Last 24 hours  | | | | | |
|--|-----------|---------|-------------------------|-------------|----------|
| Transaction ID | To | Subject | Uploaded | Transmitted | Status |
| TIN050820080000164 | TRACMPROD | Test | 2008-05-08 15:16:20 EDT | N/A | Received |

Explanation of statuses:

- **Received.** A file has been successfully uploaded.
- **Transmitted.** A file has been picked up by iMAX for processing.

4.2.3 Received from TRACS

Selecting this tab allows the user to view the files that have been received from TRACS.

4.2.4 Sent to Others

Selecting this tab allows the user to view the files that have been sent to other iMAX Users.

| Transaction ID | To | Subject | Uploaded | Attachment |
|--------------------|---|---------|-------------------------|-----------------------|
| TIN050720080000156 | TRACM16004 | 4 | 2008-05-07 13:52:23 EDT | f.txt |
| TIN050720080000154 | TRACM15692 TRACMPROD TRACM16004 TRACM09405 | files | 2008-05-07 13:51:46 EDT | g.txt |
| TIN050720080000152 | TRACM16004 | hi | 2008-05-07 13:50:22 EDT | f.txt |
| TIN050720080000121 | TRACM16004 | 4 | 2008-05-07 13:29:07 EDT | f.txt |

1. To view any file, select from the Attachments column.

4.2.5 Received from Others

Selecting this tab allows the user to view any files that have been received from other iMAX Users.

| Transaction ID | From | Subject | Received | Attachment |
|--------------------|------------|---------|-------------------------|--|
| TIND50820080000160 | TRACMPROD | 1 | 2008-05-08 11:33:20 EDT | TIND50820080000160.txt |
| TIND50820080000159 | TRACMTEST | 1 | 2008-05-08 11:32:01 EDT | TIND50820080000159.txt |
| TIND50720080000154 | TRACM15692 | files | 2008-05-07 13:51:46 EDT | TIND50720080000154.txt |
| TIND50720080000149 | TRACM15466 | files | 2008-05-07 13:43:46 EDT | TIND50720080000149.txt |
| TIND50720080000143 | TRACM09405 | files | 2008-05-07 13:40:44 EDT | TIND50720080000143.txt |

4.3 iMAX User Profile

4.3.1 Change Password

Please refer to section 3.3 for information.

4.3.2 Profile Management

1. Select the Profile tab followed by the Profile Management sub-tab.



2. Select [Edit Profile](#) on the right hand side of the screen; the following screen will appear:

Edit User TRACM15692

| | |
|--------------|--|
| First Name | <input type="text" value="Joe"/> |
| * Last Name | <input type="text" value="Smith"/> |
| Description | <input type="text"/> |
| Title | <input type="text" value="Building Manager"/> |
| Organization | <input type="text" value="Nunday Villa Apts"/> |
| Address | <input type="text" value="555 Main Street"/> |
| Telephone | <input type="text" value="15550000"/> |
| Fax | <input type="text"/> |
| Email | <input type="text" value="nundayvilla@aol.com"/> |

3. Make any necessary alterations in the correct field and then select

Update

4.4 Special Instructions for Error Correction

There are no special instructions needed for error corrections. The system will prompt the user when an error occurs in the data entry. The user will need to correct the error before the system will proceed.

4.5 Caveats and Exceptions

There are no caveats or exceptions applicable to iMAX.

5.0 QUERYING

5.0 QUERYING

5.1 Query Capabilities

Please refer to Section 4 in regards to the query capabilities of the iMAX system.

5.2 Query Procedures

Please refer to Section 4 in regards to the query procedures of the iMAX system.

6.0 REPORTING

6.0 REPORTING

6.1 Report Capabilities

Please refer to Section 4 in regards to the reporting capabilities of the iMAX system.

6.2 Report Procedures

Please refer to Section 4 in regards to the reporting procedures of the iMAX system.

APPENDIX A STATUS MESSAGES

APPENDIX A STATUS MESSAGES

The following table identifies the iMAX status messages.

| Status Code | Status Description | Clarification / Corrective Action for Errors |
|-------------|---|---|
| 200 | Success | No corrective action is necessary. |
| 300 | Missing Files | System did not find an uploaded file. Please upload the file again. |
| 400 | Authentication of iMAX User ID and Password Failed | To verify the iMAX ID (TRACMXXXXX) and password, please contact the Multifamily Help Desk at 1-800-767-7588. |
| 401 | Authentication of WASS User ID and Password Failed | For assistance with WASS IDs (for example, M55551) issues, please contact the REAC TAC at 1-888-245-4860. |
| 403 | (Forbidden). The WASS ID is not in the imaxuser LDAP group. | If you are WASS user, verify that your WASS ID (for example, M55551) has the iMAX role assigned. If you are a WASS Coordinator, make sure the iMAX action and iMAX roles are assigned. If not, have the role and/or action assigned. You will be added to the group within 24–48 hours. |
| 405 | LDAP Communication Error – System unavailable | System is currently unavailable. Please retry later. |
| 500 | Internal System Error – System unavailable | System is currently unavailable. Please retry later. |
| 600 | No Message Found in outbox | System found no messages in the sent to others outbox. No corrective action is necessary. |
| 601 | No Message Found in inbox | System found no messages in the received from others inbox. No corrective action is necessary. |
| 602 | No Results Found | System found no response files from TRACS for the specified period. No corrective action is necessary. |
| 603 | No Requests Found | System found no request files from the TRACS for processing. No corrective action is necessary. |
| 604 | No Broadcast Message | System found no Broadcast Messages. No corrective action is necessary. |