



DRGR Fact Sheet

For User Administration

(includes New User Requests
and Changes to Existing Users)

Release 7.10

U. S. Department of Housing and Urban Development
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Introduction

Before R7.10, the request for new accounts and changes to accounts was managed via a process outside of the DRGR system. Supervisors submitted requests by email or CHAMPS. DRGR HQ Administrators created the profile after verifying that the information was completed and submitted by the appropriate HUD field staff person.

Starting in R7.10, the DRGR users are able to submit requests for account changes within DRGR. Each request is validated by appropriate users in DRGR and once approved by HUD, the user(s) and requestor(s) are notified via email that the requested accounts have been set-up. The following users have the privilege in DRGR to create new or update user requests:

- HUD Field Office Managers
- HUD CPD Reps
- Grantee Administrators

New User Request

Authorized users submit a new user request via the “Request New User” link in the Admin Module. If the user does not have the authorized role then this link is not available.

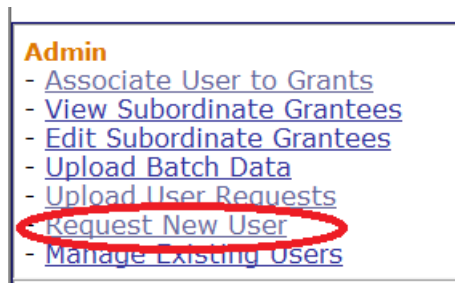


Figure 1: Request New User Link

On selection of the link the user is displayed the page to either search for the user in IDIS (to prevent duplication) or create a new user request.



Figure 2: Request New User Selection

An IDIS user can be searched by using either Username or Name. The Name search is not case sensitive and matches on last name and first name of the user.

- For requests made by grantee users, the system only queries the active users in IDIS which are associated with an IDIS Grantee (same DUNS# or TIN# as the DRGR grantee). Note that only users that do not exist in DRGR are displayed.
- For requests made by a HUD user, the system queries all active IDIS users. Note that only users that do not exist in DRGR are displayed.

Admin

Request New User

• No matching IDIS users were found, or all matching users already have a DRGR account. Please use 'Manage Existing Users' if you wish to submit an edit request for an existing DRGR user.

* Does staff already have a HUD username in IDIS? (e.g. C*****, B*****, H*****)
 Yes No/Unknown/Unable to find

Please search for and select staff user below:

Search Criteria

Username:	Name:
<input type="text"/>	John Doe

0 Record(s) No more Record(s) on this page

No records are found.

Figure 3: Search for IDIS User

If the user selects “No/Unknown/Unable to find” then the Request New User page is displayed. The page has two sections –a) User Contact and b) User Profile.

The User Contact section supports the capture of user information including the PIN number. The PIN number is a five digit number that will be required by the HUD Help Desk.

Admin

Request New User

*Indicates Required Field

*First Name: John	Title:
*Last Name: Doe	Organization:
*Email: j.doe@doe.com	Phone Number: Ext:
Address 1:	Fax:
Address 2:	*PIN (five digits used in initial password): *****
Address 3:	*PIN (re-enter): *****
City:	
State: Zip Code:	

Figure 4: Request New User Part I

The User Profile section supports the definition of user roles and provision of comments/supporting documents. A requester can upload one or more documents in the supporting documents section. Note the user types that can make the requested changes to the privileges in the boxes below.

- For requests made by the grantee, the Grantee Profiles are restricted to the agency of the requested user.

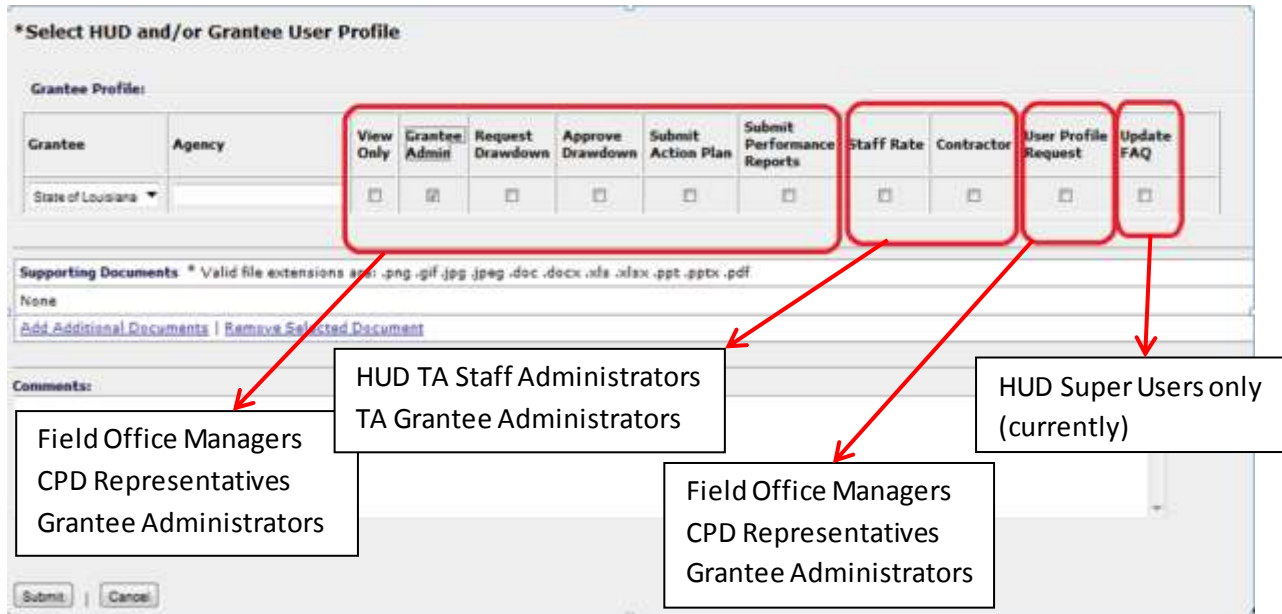


Figure 5: Request New User Part II

Each request has to be approved by HUD. After submission, the system notifies the HUD approvers with a receipt of the request. On approval, the notification is sent to the requestor. When the request is activated by the HUD Headquarter Administrator, a completion notification is sent to the requestor and the person for whom the request was made. If the request is for a new user, the login id is also provided.

Edit User Request

Authorized users submit a new user request via the "Manage Existing Users" link. NOTE: If the user does not have the authorized role, this link is not available.

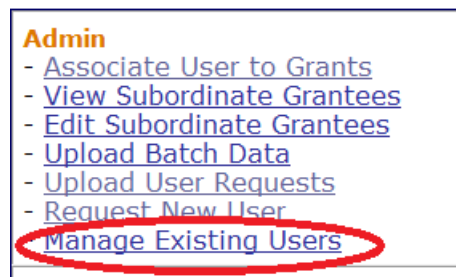


Figure 6: Manage Existing Users Link

On selection of the link, the user is displayed the Manage Existing Users page to search for the user. The following actions can be taken on the selected user:

- Request Edit – request changes to the user information and privileges
- Request Deactivation – Deactivate the user profile



Figure 7: Manage Existing Users

On Request Edit, the user is displayed the Request User Edits page that is similar to the Request New User page. After submission, the system notifies the HUD approvers with a receipt of the request. Each request has to be approved by HUD. On approval, the notification is sent to the requestor. When the request is activated by the HUD Headquarter Administrator, a completion notification is sent to the requestor and the person for whom the request was made.

User Request Approvals (HUD Staff Only)

All user requests require two sets of HUD authorizations:

- a) Supervisory approval
 - All Grantee requests are approved by either the CPD Rep or Field Office managers
 - HUD HQ/Field Office users are approved by the appropriate HUD managers (excluding the manager who made the request)
- b) HUD Headquarters Administrator activation

HUD users with approval rights have access to the “Certify” links under the “Admin” menu option to approve user requests. The approval of user requests is similar to the certification process.



Figure 8: Approve/Certify Users Requests Links

The certification page displays the list of users that require approval for new, modification or deactivation of users. Selecting the users and clicking on the appropriate “Approve...” button will approve the request. Note that there is not a rejection step.



Figure 9: Approve/Certify/Deactivate User Requests

Selecting the user and clicking the “View Requested User” button displays the “View User Profile” page.

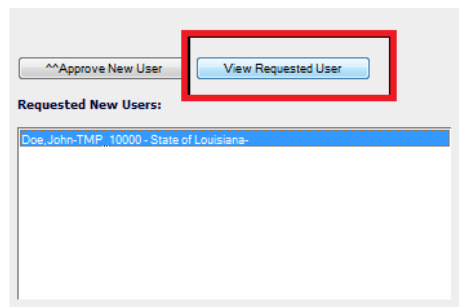


Figure 10: View Requested Users

The View User profile displays the details of the request.

Admin

View User Profile View User

First Name: John **User Name:** TMP_10000
Last Name: Doe **Title:**
Email: srabhi@caci.com **Organization:**
Address 1: **Phone Number:** Ext:
Address 2: **Fax:**
Address 3:
City:
State: **Zip Code:**

User Profiles:

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Active
State of Louisiana		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Supporting Documents
None

User Request History:

Type	Action	Date	By	Email	Profile	Comments
New User	Request	05/14/2014		srabhi@caci.com	State of Louisiana	

Figure 11: View User Requests

User Request Status Report

Report “User Change Request – Outstanding Requests” reports the status of the requests. The following Actions are reported – Request, Approve, Generate ADP Ticket, and Complete. If the request is not in complete status then contact your supervisor or HUD contact.

User Change Request - Outstanding Request

Home ▾ Tools ▾ Data ▾ Grid Format ▾

REPORT DETAILS

Report Filter:
{User Change Request.Type} = NW/New User

Change Request	Requested User	Last Action	Requested Grantee Profile	Requested HUD Office Profile	Action	Action Taken By	Action Date	Comments
100000	John Doe	Request	State of Louisiana	N/A	Request		14/05/2014	

Figure 12: User Request Status Report

HUD HQ Administration (HUD Staff Only)

Once the user requests have been approved, the HUD HQ Administrators are able to do following actions to activate the requests on the “User Admin - Active and Inactive Users” page:

- Edit Requested User – allows modification to the user request and displays requested roles.
- Generate ADP Request – generates an excel spreadsheet with requested user information. This is then sent to ADP security for processing and account creation.
- Activate New User Request – activates the profile. After the request is processed via ADP, a HUD HQ Administrator will activate the new user profile. The requestor and the newly activated user are automatically notified via email. For new user requests, please coordinate with ADP Security to confirm that the new user accounts have been enabled in Siteminder.
- Deactivate User Change Request – deactivates the profile.



Figure 13: HUD HQ Administrator Actions