

# PersonnelAddEdit Upload Instructions

Disaster Recovery Grant Reporting (DRGR) System Release Fact Sheet

<https://www.hudexchange.info/program-support/my-question/>

## Overview

The DRGR System shall allow HUD Users and TA Providers with the Staff Rate role to manage the TA Provider's personnel via a data upload. [Download the "Personnel Add/Edit/Deactivate" upload template](#) and use these instructions to complete the data file. After completing the file, the instructions to upload the file into DRGR are contained in Chapter 34 of the [DRGR User Manual](#). The DRGR upload function is available under the "Upload Staff Data" menu option under the Administration module. The upload is available as a Power Upload and in the "STAFF" family of uploads.

### NOTE

Use the [separate upload instructions](#) and [data upload](#), to add/edit/deactivate labor categories and rates in DRGR. Both the labor category and rate upload and the personnel upload are required steps to comply with HUD standards.

## Procedures for Uploading Data into DRGR

1. [Download the "Personnel Add/Edit/Deactivate" upload template](#). Use the instructions in this document to complete the upload template. Template should be saved as a .csv file type.
2. When the upload template is complete, log in to DRGR as a user with either:
  - 2.1. Staff Rate privileges for the TA Provider.
  - 2.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
3. In DRGR, select to the Administration menu and click on the "Upload Staff Data" option.
4. Select "PersonnelAddEdit" from the "Select Upload Type" field.

*Figure 1-Staff Rate Data Upload Type*

### DRGR DATA UPLOAD

**Please select the Upload Type**

Select Upload Type: LaborCategoryAddEdit  
PersonnelAddEdit

[Click here to view sample upload templates.](#)  
Select button to get specific DRGR data: Supporting Info

**Please select the file to upload**

Please select file in csv format and click the Upload File button

Choose File Upload

5. Select “Choose a File” button. This opens a pop-up window.
6. In the popup window, browse for the .csv upload template and open it. This closes the popup window and the selected file name appears in DRGR.
7. Click on the “Upload” button to start the upload.
8. DRGR will display the screen in Figure 2 below. If any records are unsuccessful, use the “Download Upload Details” link to view the errors. The errors must be corrected in the .csv file. Select “Upload Another File” to upload the corrected data.

**Figure 2-Data Upload Results**

DRGR DATA UPLOAD

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[Upload another file](#)

File Upload Results Info:

Total number of file rows:

4

Uploaded number of rows:

4

Status of the Uploading:

Completed Successfully

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[Download Upload Details](#)

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View Upload Data

## Data Element Matrix

Use these entries when completing the data field on the upload template.

**Table 1-Data Element Matrix**

PersonnelAction	PersonnelStatus
AddPersonnel	Active
EditPersonnel	Inactive
AssociateLaborCategory	
DeassociateLaborCategory	

### Personnel Actions Allowed:

- Use the “AddPersonnel” to add a person into the system.
- Use the “EditPersonnel” to edit information for a person already in the system.
- Use the “AssociatePersonnel” to associate a person already in DRGR to a labor category.
- Use the “DeassociatePersonnel” to disassociate a person from a labor category.

#### NOTE

Within the data upload, add/edit personnel using one row. And associate/deassociate personnel using a different row.

## Required Field Matrix

### Legend

- The numbers in the Personnel Actions header fields correspond to the following options:  
(1) AddPersonnel, (2) EditPersonnel, (3) AssociateLaborCategory, (4) DeassociateLaborCategory.
- REQ indicates that the field is required field. OPT indicates that the field is optional. And a dash symbol (—) indicates that the field should be blank for the specified action; these will be ignored by the system.

**Table 2-Required Field Matrix**

Field Names	Personnel Actions			
	1-Add	2-Edit	3-Associate	4-Deassociate
PersonnelAction	REQ	REQ	REQ	REQ
TAProvider	REQ	REQ	REQ	REQ
LaborCategoryTitle	—	—	REQ	REQ
FirstName	REQ	OPT	—	—
MiddleName	OPT	OPT	—	—
LastName	REQ	OPT	—	—
Organization	OPT	OPT	—	—
PersonnelEmailAddress_Current	—	REQ	REQ	REQ
PersonnelEmailAddress_New	REQ	OPT	—	—
PersonnelStatus	OPT	OPT	—	—

## Validations

- Logged-in user must have:
  - Staff Rate privileges for the TA Provider.
  - HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
- PersonnelAction must be provided.
- TA Provider must be provided.
- Verify all fields are included.

### Additional Validations for the AddPersonnel Action

- A value must be provided for `personnelemailaddress_new`.
- The value provided must be unique for the TA Provider.

### Additional Validations for the EditPersonnel Action

- The `personnelemailaddress_current` must be provided.
- The value provided for `personnelemailaddress_current` must match a record for the TA Provider in DRGR.
- When a value is provided for `personnelemailaddress_new`, the value must be unique for the TA Provider.

### Additional Validations for the AssociateLaborCategory Action

1. The labor category title must be provided.
2. The labor category title must be an exact match of a labor category title for the TA Provider in DRGR.
3. The `personnelemailaddress_current` must be provided.

### Additional Validations for the DeassociateLaborCateogry Action

1. The labor category title must be provided.
2. The labor category title must be an exact match of a labor category title for the TA Provider in DRGR.
3. The `personnelemailaddress_current` must be provided.
4. If the person/labor category is associated to a Work Plan, the individual cannot be disassociated from a labor category.