



Chapter 2: Access and Navigate the System

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Chapter 2: Access and Navigate the System

This Chapter contains procedures to access the DRGR System. In addition, it provides basic navigation instructions and information on each DRGR System module.

A. Hardware Requirements

The DRGR System is functional on both personal computers running on a Windows operating system and Apple Macintosh computers.

B. Internet Access and Browsers

An internet connection and an internet browser are required to access the DRGR System. A high-speed connection is recommended but not required. Google Chrome (47.x and later), Microsoft Edge (3.5 and higher), and Mozilla Firefox are recommended internet browsers. While most DRGR System functions work in Microsoft Internet Explorer version 11, some DRGR System functions do not work. All browsers must disable the pop-up blocker feature for drgr.hud.gov.

No other software is needed to use the DRGR System. However, some DRGR reports export to PDF. To open and save PDF documents, a free version of Adobe Reader is available for download at this website: <https://get.adobe.com/reader>.

C. Login to the DRGR System

C1. User Account

Access to the DRGR System is available to authenticated users. To become an authenticated Grantee user, a user account request is both submitted in the DRGR System by an existing, authenticated user with the user account request role and approved by a HUD Administrator in DRGR. User accounts are associated with a single Grantee profile in the DRGR System. For HUD users, a supervisor must submit a user account request via HUD's DIAMS, and then a HUD Administrator approves in DRGR. The details of the account access process are simple and included in Chapter 5 of this Manual. After the user account is approved by HUD, the login ID and password is used to log into the DRGR System.

TIP!

Each Grantee profile is associated with a Grantee type (TA provider and non-TA providers). To access both TA provider and non-TA provider features in DRGR, a user must have multiple profiles. Profiles are added to User Requests. See Chapter 5 – User Management and Certifications for more information.



C2. Access the DRGR System

Depending on the user, a few options are available to access the DRGR System. The first System access option is most familiar to most users. The second System access option is HUD’s Grant Management Portal (GM Portal) and includes a single landing page for users with access to multiple HUD systems. Users can also access MicroStrategy directly from the GM Portal, without navigating through the DRGR System.

- Option 1: <https://drgr.hud.gov/DRGRWeb>
- Option 2: <https://drgr.hud.gov/GMPortal>

For HUD users, the DRGR System is part of HUD’s single sign on system. This means HUD users logged into HUD’s VPN can access the System and bypass the login page. The single sign on web address for the DRGR System is <https://drgr.hud.gov/ssoDRGR>.

TIP! Users may perform an internet search for “DRGR Login” to easily access the login page. Remember that DRGR works optimally in Google Chrome. Bookmarking the site is a helpful way to quickly access DRGR, but be sure to update bookmarks after each DRGR release to ensure smooth access.

C3. User IDs and Passwords

Each DRGR User needs a User ID and a password to login to the DRGR System. The following is a list of DRGR Login requirements and conditions:

Type	Requirements and Conditions
User ID	The User ID is the user's “C,” “B,” or “H” number, which is assigned by HUD IT Security and communicated by the HUD Admin of the DRGR System.
Password	<p>Grantee users receive a temporary password from the HQ Admin, along with the User ID. Following initial login, the DRGR System requires users to create a new password. Passwords in the DRGR System must meet all of the following standards:</p> <ul style="list-style-type: none"> • At least eight characters long. • Contain one upper case letter. • Contain one lower case letter. • Contain one number. <p>Passwords may contain special characters when other conditions are met.</p> <p>The System requires users to change their login password every six (6) months.</p> <p>HUD Users do not manage User IDs and passwords in the DRGR System directly. Rather, the User IDs and passwords used to log onto HUD’s network are also used for the DRGR System.</p>
Note	<ul style="list-style-type: none"> • All existing users can call HUD’s HITS National Help Desk at 888-297-8689, option 9, to reset forgotten passwords only. • All existing users can email DRGRHelp@hud.gov to retrieve log in IDs for DRGR and the five-digit PIN required for the HITS National Help Desk. <p>See addition troubleshooting tips in section C5 below.</p>



C4. Login to the DRGR System

The following steps should be used to login into the DRGR System.

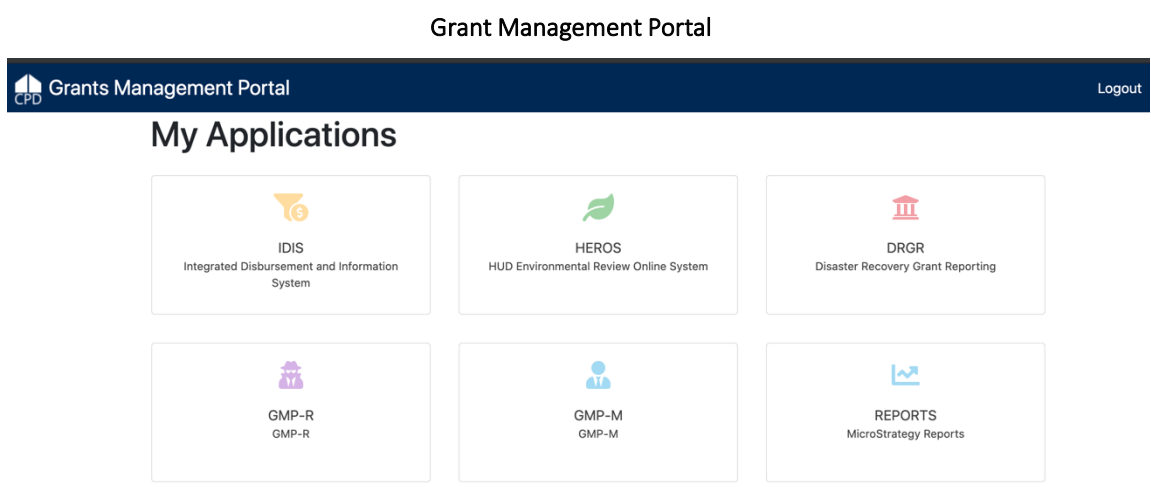
User Role: Grantee Users and HUD Users	Menu Option: N/A
Purpose: Allow Grantee Users and HUD Users to access the DRGR System.	
<p>1 Access the DRGR System using an internet browser and one of the following options:</p> <ul style="list-style-type: none">→ https://drgr.hud.gov/DRGRWeb→ https://drgr.hud.gov/GMPortal→ https://drgr.hud.gov/ssoDRGR (permitted for HUD Users within HUD VPN; the next two steps do not apply if this option is used) <p>DRGR works optimally in Google Chrome. See C.2 <i>Access the DRGR System</i> above for details.</p>	
<p>2 Complete the following actions on the login page:</p> <ul style="list-style-type: none">a. Add the User ID to the “Username” field and add the password to the “Password” field. The password is case sensitive.b. Select the <I agree to the Terms of Service> radio button. DRGR users cannot access the DRGR System until they agree to the “Terms of Service.”c. Select the <Login> button. If the login attempt is successful, a new page will load.	

The screenshot shows the 'CPD Grants Portal Login' page. On the left is a red sidebar with 'Homes & Communities' branding and a navigation menu. The main content area has a red header with 'Community Planning & Development' and 'CPD Grants Portal Login'. Below the header, it asks for a Username and Password. Callout 'a' points to these two input fields. Below the input fields is a scrollable area containing a consent statement and a list of Rules of Behavior (RoB). Callout 'b' points to the 'I agree to the Terms of Service' radio button. Below the consent area is a 'Login' button, which callout 'c' points to. At the bottom of the page, there is a footer with FOIA, Privacy, and Web Policies links, along with contact information for the U.S. Department of Housing and Urban Development.

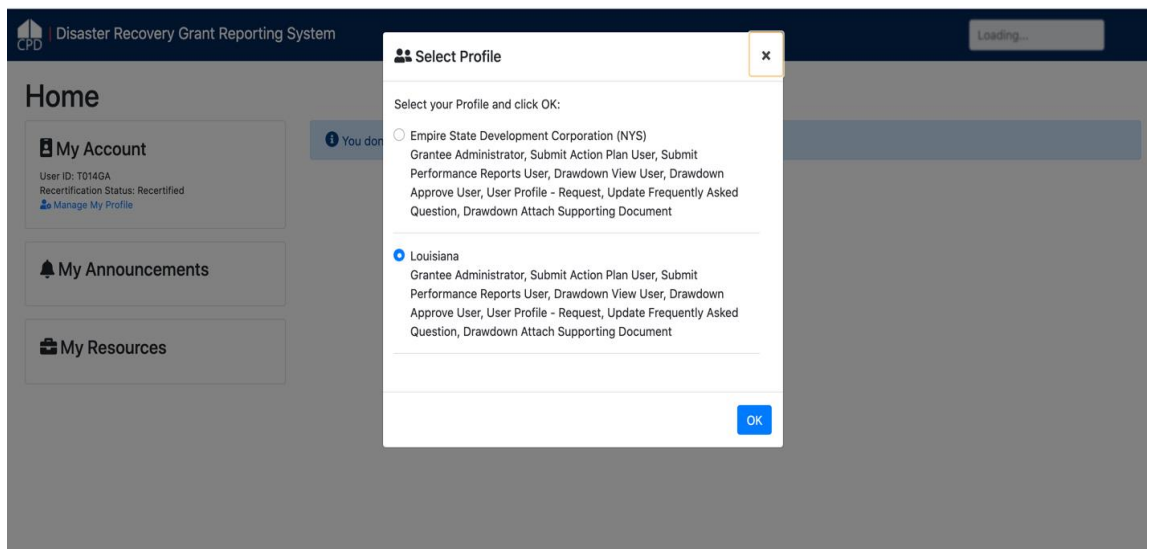


User Role: Grantee Users and HUD Users	Menu Option: N/A
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3 NOTE: If accessing DRGR through the <GM Portal> link, all CPD systems that the logged-in user is authorized to access are displayed in tiles in the GM Portal. Users can click on each tile and access the selected CPD system. Select DRGR to continue.



3 For users with more than one User Profile, the “Select Profile” page will be displayed. Select the radio button next to the desired profile followed by <OK>.



4 For users with a single User Profile, the “Home” page will display. See applicable screenshot below.



User Role: Grantee Users and HUD Users Menu Option: N/A

Disaster Recovery Grant Reporting System Grant Number

Home

My Account
User ID: 856428
Recertification Status: Recertified
Message My Profile

My Announcements

- DRGR System Outage Notification - DRGR was down yesterday (7/1/2020) from 11:30 AM EST through close of business. The system back up was completed at 2:00 AM EST on 7/2/2020 with data as of 7/1/2020 6:00 AM EST. Any updates made between 6:00 AM EST and 11:30 AM EST must be completed again. We apologize for the inconvenience. (7/1/20)
- User re-certification is extended through August 31, 2020. Users are currently unable to save user certification changes, due to an issue caused by DRGR Release 8.1. HUD expects to resolve the issue by July 24, 2020. Users who were NOT re-certified between June 1, 2020 and June 27, 2020 must be re-certified by August 31, 2020, to avoid a lapse in access to DRGR. (6/30/20)
- With Release 8.1, a system error exists when grantee users attempt to add a MONITORING/AUDIT/A event record. Another Release will be scheduled within the next 30 days to resolve this issue and this notice will be updated accordingly. Thank you for your patience. (5/25/20)
- If you have any questions or experience any delay to please contact HUD's Ask a Question (FAQ) portal, under "My questions related to," select "DRGR Disaster Recovery Grant Reporting System." (6/16/19)
- Instructions for DRGR users on how to perform the data uploads and prepared read templates can be found at https://www.hudexchange.info/resources/2060/your_approval_data_upload_instructions_and_templates.html. Note: user must provide data in all four fields of the new data upload (no blanks) and the submission date value must be the present date or a future date (excluding weekends). The system will not accept dates prior to the date the upload is attempted. (6/16/19)

Active Flags 3

Flags

8

Grantee users pending Certifications 1

Certifications

1

C5. Troubleshoot Login to the DRGR System

The following instances will prevent users from accessing the DRGR System. Procedures to remedy each instance is described.

- **Password Resets.** The DRGR System allows three login attempts. After the third failed login attempt, the DRGR System locks out the user, preventing access even with the correct password. If a user experiences an issue with their login or password, call the HUD Help Desk at 1-888-297-8689 (Option 9).
- **Inactive Accounts.** Users that have not accessed the System for more than 60 days are automatically deemed inactive by the DRGR System. In these instances, their User IDs must be re-activated by the HQ Admin. Users that need to have their account reactivated should contact the DRGR user that is responsible for managing existing user accounts.
- **Session Resets.** The DRGR System disables access for 30 minutes, if a user improperly logs out of DRGR and then immediately attempts to access the System. This is in place as a HUD IT security measure. Users who need to log into the System before 30 minutes has lapsed must email DRGRHelp@hud.gov, enter "Session Reset" in the subject line, and include the user ID in the body of the email message.
- **Five-Digit PIN.** The DRGR System requires each user to provide a five-digit personal identification number (PIN) at the time of account setup. This PIN is used by the HUD HITS Help Desk to reset password. Users who forget his/her PIN can email DRGRHelp@hud.gov to retrieve or reset the PIN.

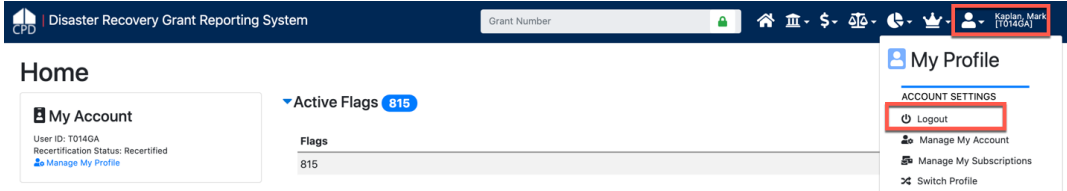
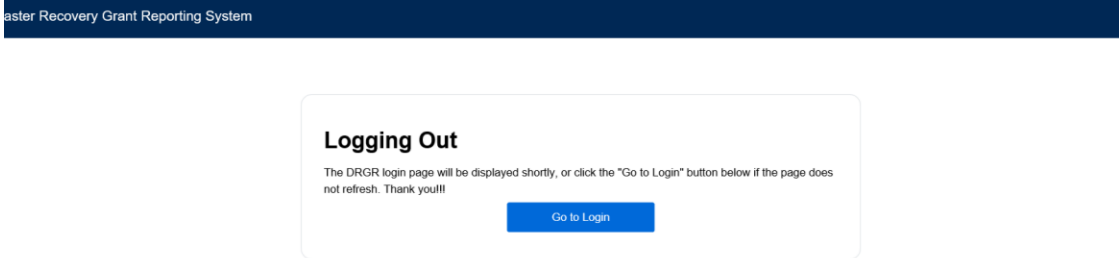


- **Certifications.** Every DRGR User Account must be recertified by January 1 and July 1 of each year. If a user is not certified by the recertification deadline, they will be unable to access the DRGR System until they are recertified. Users that need to be recertified should contact their DRGR Administrator. Administrators may begin recertifications in December and June of each year.

TIPS!

- Navigate using DRGR links, rather than the Internet browser buttons.
- Do not use the BACK button in the Internet browser.
- Logout using the <Logout> link in My Profile. Do not simply close the window.
- Save early, save often! The DRGR System times out after 20 minutes of inactivity.
- To copy/paste text into DRGR, do so from WordPad or a file in .txt format.

C6. Logout of the DRGR System

User Role: Grantee Users and HUD Users	Menu Option: Logout
Purpose: Allow Grantee Users and HUD Users to logout of the DRGR System.	
<p>1 In the DRGR System, select My Profile, or icon, located in the navigation bar. This opens the dropdown menu for the My Profile module. Select the <Logout> option.</p> 	
<p>3 The following message will be displayed upon successful logout.</p> 	


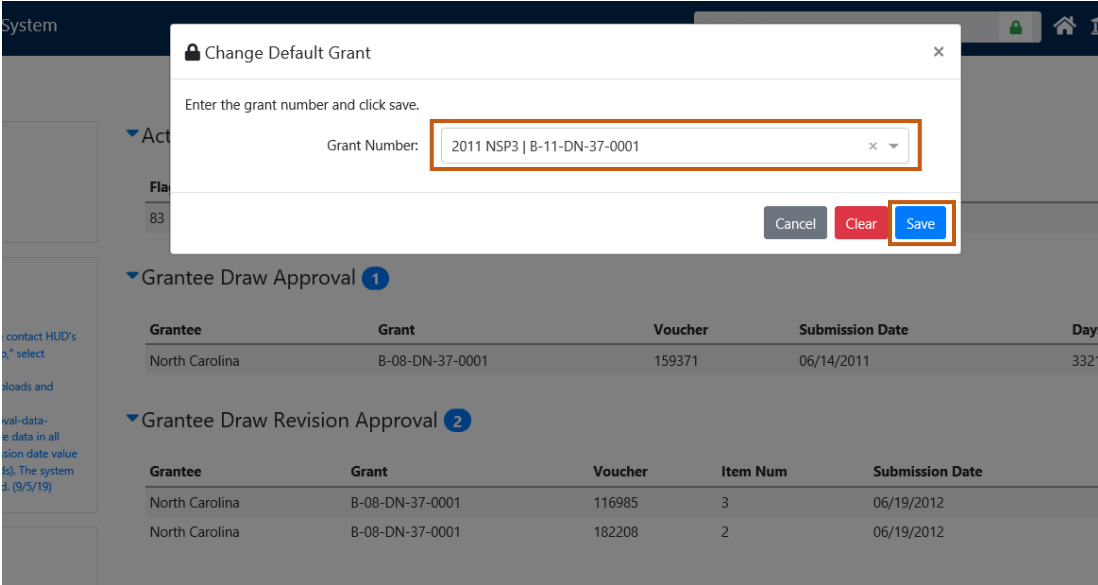


D. DRGR Basic Navigation and System Modules

D1. DRGR Navigation Bar

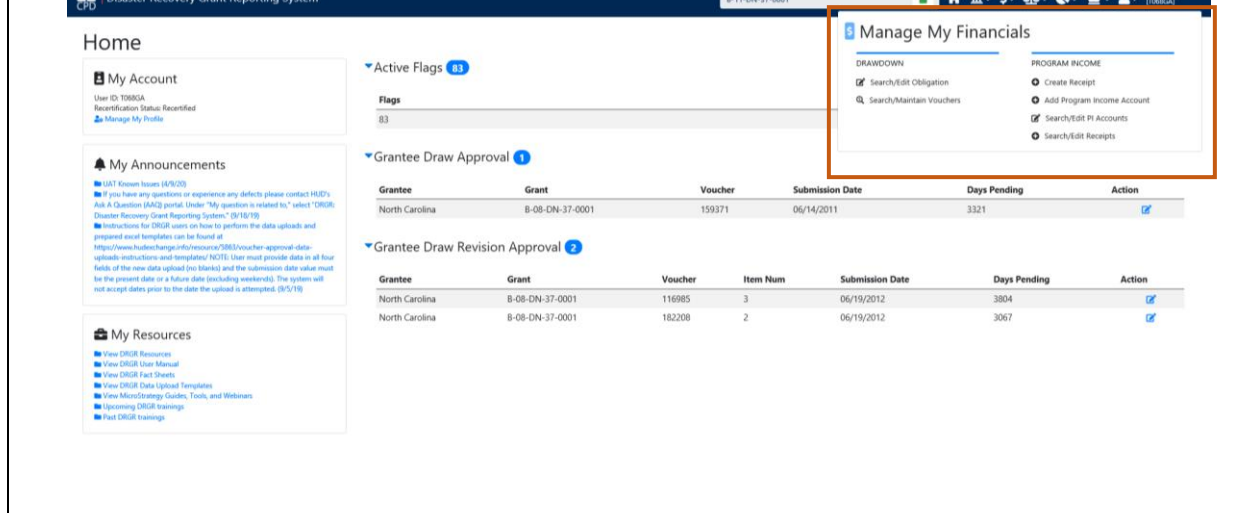
This section provides the basic navigation of the DRGR System modules after login. The DRGR System contains seven modules that can be accessed via the Navigation Bar at the top of the page.

The Navigation Bar also contains the “Select Grant,” also referred to as the “Locked Grant” feature. Most results returned for each module are dependent on this grant, however, some functions offer global searches that are not dependent on the selected grant. The DRGR System automatically defaults to the most recently awarded grant.

User Role: Grantee Users and HUD Users	Menu Option: N/A
Purpose: Allow Grantee Users and HUD Users to select a Grant and navigate the DRGR System.	
1 To select a Grant to work in across the modules, select the Grant Number in the Navigation Bar.	
	
2 The “Select Grant” page will load. Select the desired Grant from the dropdown menu and select <Save>.	
	











- To navigate to a DRGR module, select one of the icons in the Navigation Bar. A menu of options unique to the selected DRGR module will appear. Select the desired action and a new page will load.



























D2. Grantee | Basic Navigation

The following tables show the menu options available to DRGR Grantee Users and a brief description of each option. Some menu options are dependent on user roles and permissions (see DRGR User Manual Chapter 5).

























Grantee Menu Options

Module	Menu	Submenu Options	Description
 Manage My Grants	Action Plans	 Add Action Plan	Add a new Action Plan in DRGR
		 Manage Action Plan	Edit an existing Action Plan
		 View Action Plan	View an existing Action Plan
		 Download Action Plan	Download Action Plan PDF
		 Search Action Plans	Search for Action Plans in DRGR
		 Review Tools	Access Action Plan Review Tools
		 Lookup Consolidated Plans	Lookup Consolidated Plans in DRGR



Module	Menu	Submenu Options	Description
 Manage My Grants	Projects	 Add Project	Add a new Project to the Action Plan
		 Search Projects	Search for existing Projects
 Manage My Grants	Activities	 Add Activity	Add a new Activity to the Action Plan
		 Search Activities	Search for existing Activities
		 Restore Activities	Restore Activities that were previously deleted
 Manage My Grants	Grantee Programs	 Add Grantee Program	Add a new Program to the Action Plan
		 Search Grantee Programs	Search for existing Programs
 Manage My Grants	Performance Reports	 Manage Performance Report	View, edit, and submit Quarterly Performance Reports
		 Search Performance Reports	Search for Quarterly Performance Reports
		 Manage Addresses	Add Addresses to a Quarterly Performance Report
 Manage My Grants	Grants	 Closeout Grant	Initiate and submit closeout of a Grant
		 View Grant	View existing Grants
		 Search Grants	Search existing Grants
 Manage My Grants	Work Plans (TA Only)	 Manage Assignments	Search and Edit Assignments
		 Add Work Plan	Add a work plan to an Action Plan
		 Manage Work Plans	Search for and edit existing work plans
		 Upload Work Plan	Upload work plan data directly to DRGR
	Drawdown	 Search/Edit Obligation	Search and edit Activity Obligations



Module	Menu	Submenu Options	Description
 Manage My Financials		 Search/View Obligation	Search and view Activity Obligations
		 Create a Voucher	Create a Voucher
		 Search/Maintain Vouchers	Search existing Vouchers to view, approve/reject, or revise
 Manage My Financials	Program Income	 Create Receipt	Create Program Income Receipts
		 Add Program Income Account	Create Program Income Accounts
		 Search/Edit PI Accounts	Search and edit existing Program Income Accounts
		 Search/Edit Receipts	Search and edit existing Program Income Receipts
 Manage My Financials	Invoice	 Add Invoice	Create Invoices
		 Search/Edit Invoices	Search and Edit Existing Invoices
 Manage My Compliance	Manage Flags	 Search Flags	View and remediate or resolve existing Flags
 Manage My Compliance	Monitoring / Audit / TA Events	 Add Event	Add a new Monitoring/Audit/TA Event
		 Search Events	Search and edit existing Monitoring/Audit/TA Events
		 Search Event Topics	Search and edit existing Event Topics
 Data Analytics	Analytics	 Reports	Access MicroStrategy Reports
		 Public Data Portal	Access the DRGR Public Data Portal
 Administration	User Management	 Associate Users to Grants	Grant DRGR Users permission to view and/or edit selected Grant(s)
		 Certify Grantee Users	(Re)certify DRGR Users





Module	Menu	Submenu Options	Description
		Request New Users	Request a New User be granted a DRGR User Account and/or Profile
		Manage Existing Users	Request edits to an existing DRGR User Profile
		Upload User Requests	Upload DRGR User data directly into DRGR
 Administration	Staff Rates (TA)	Add Labor Category	Add Labor Category and enter data on personnel and rates
		Manage Labor Categories	Search and edit existing Labor Categories
		Manage TA Staff	Enter personnel data
		Upload Staff Data	Upload Staff Data directly into DRGR
 Administration	Manage Grantees	Add Responsible Organizations	Add Responsible Organizations
		Search Responsible Organizations	Search and edit existing Responsible Organizations
		Upload Responsible Organizations	Upload Responsible Organization data directly into DRGR
 Administration	Utilities	Upload	Upload multiple types of data directly into DRGR
		FAQs	View and search Frequently Asked Questions
 My Profile	Account Settings	Logout	Logout of the DRGR System
		Manage My Account	View and edit user account information
		Manage My Subscriptions	View and Edit email subscriptions
		Switch Profile	Switch to another Grantee Profile

D3. HUD | Basic Navigation
























The following tables show the menu options available to DRGR HUD Users and a brief description of each option. Some menu options are dependent on user roles and permissions (see DRGR User Manual Chapter 5). Contact DRGRHelp@hud.gov if a menu option is missing.


















HUD Menu

Module	Menu	Submenu Options	Description
 Manage My Grants	Action Plans	Manage Action Plan	Edit an existing Action Plan
		View Action Plan	View an existing Action Plan
		Download Action Plan	Download Action Plan PDF
		Review Action Plan	Review a submitted Action Plan
		Search Action Plans	Search for Action Plans in DRGR
		Review Tools	Access Action Plan Review Tools
		Lookup Consolidated Plans	Lookup Consolidated Plans in DRGR
	Projects	Add Project	Add Project to Action Plan
		View Projects/Activities	
		Download Projects/Activities	
		Search Projects	Search for Grantee Projects
	Activities	Search Activities	Search for Grantee Activities
	Grantee Programs	Search Grantee Programs	Search for Grantee Programs
 Manage My Grants	Performance Reports	Manage Performance Report	Create and Edit Grantee Performance Reports
		Review Performance Report	Review Grantee Performance Reports
		Search Performance Reports	Search Grantee Performance Reports
	Grants	Manage Grant	Manage grants on behalf of grantees



 Manage My Grants		 Closeout Grant	Manage grant closeout
		 View Grant	View existing Grants
		 Search Grants	Search existing Grants
 Manage My Grants	Work Plans	 Upload Requests	Upload TA Requests
		 Manage Requests	Search and Edit TA Requests
		 Manage Assignments	Search and Edit TA Assignments
		 Add Assignment	Add TA Assignments
		 Manage Work Plans	Search for and view existing TA work plans
 Manage My Financials	Drawdown	 Search/View Obligation	Search and view Grantee Obligations
		 Search/Maintain Vouchers	Search Grantee Vouchers
		 Search/View Invoices	Search, view, and approve/reject Grantee Invoices
		 Add Document Review	Add a Document Review Event
		 Search Document Review	Search and edit existing Document Review Events
 Manage My Financials	Program Income	 Search/View PI Accounts	Search and view Grantee Program Income Accounts
		 Search/View Receipts	Search and view Grantee Program Income Receipts
	Manage Flags	 Search Flags	Search and View Grantee Flags and Remediation Comments



Manage My Compliance			
 Manage My Compliance	Monitoring / Audit / TA Events	 Add Event	Add a new Monitoring/Audit/TA Event
		 Search Events	Search and edit existing Monitoring/Audit/TA Events
		 Search Event Topics	Search and edit existing Event Topics
 Data Analytics	Analytics	 Reports	Access MicroStrategy Reports
		 Public Data Portal	Access the DRGR Public Data Portal
 Administration	User Management	 Certify Grantee Admin Users	Review and approve Grantee Administrators requests; (re)certify Grantee Administrators
		 Certify Grantee Users	Review and approve Grantee User requests; (re)certify Grantee Users
		 Certify HUD Office Users	(Re)certify HUD Office Users
		 Request New Users	Request a New User be granted a DRGR User Account and/or Profile
		 Manage Existing Users	Request edits to an existing DRGR User Profile
		 Review Staff Types	Used to review TA staff rates
		 Upload User Requests	Upload DRGR User data directly into DRGR
	Staff Rates	 Manage Labor Categories	Search and edit existing Labor Categories



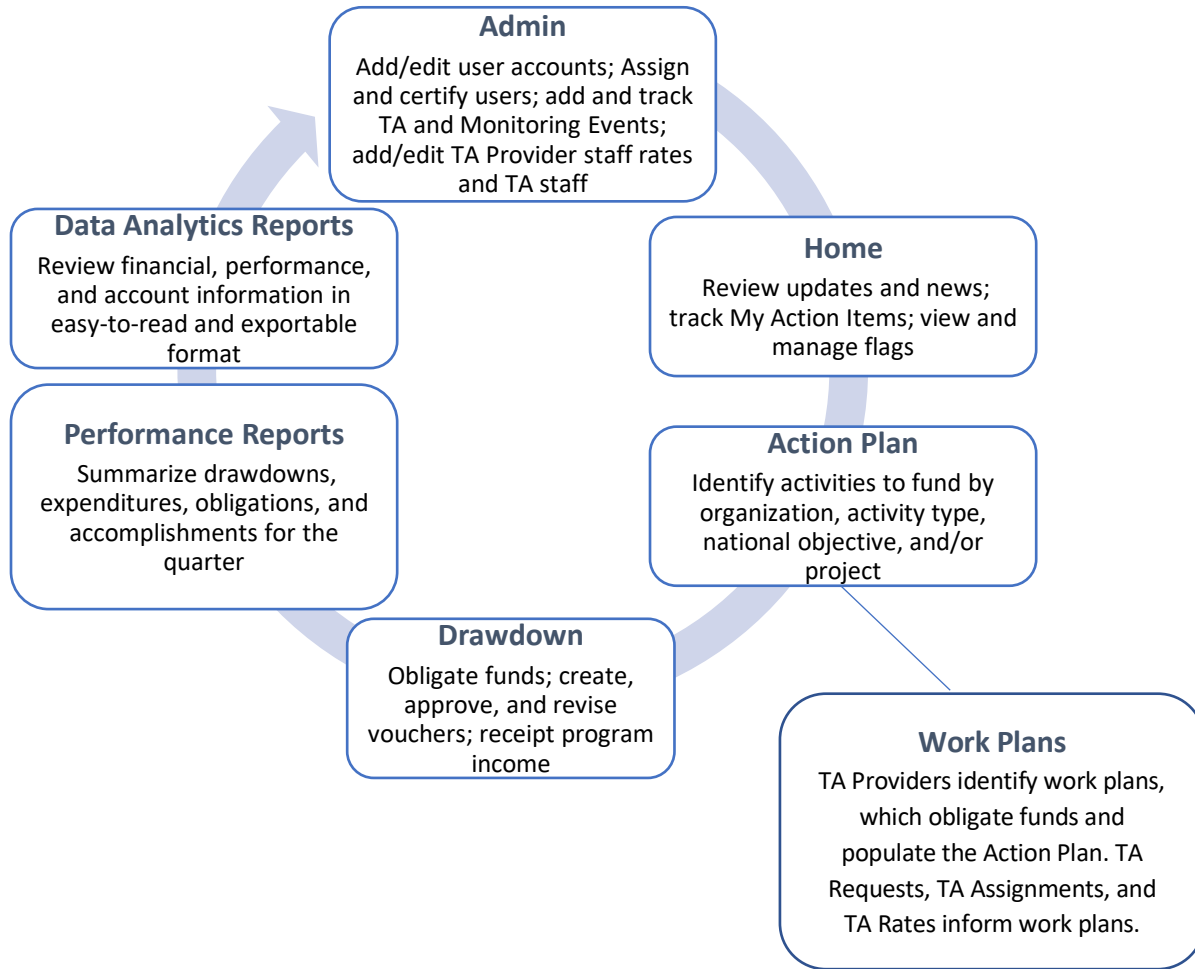
Administration	(TA)	Review Labor Categories	Search and review existing Labor Categories
		Upload Staff Data	Upload Staff Data directly into DRGR
 Administration	Manage Grantees	Search Grantees	Search for existing Grantees
		Search/View Responsible Organizations	Search and view Grantee Responsible Organizations
 Administration	Utilities	Upload	Upload multiple types of data directly into DRGR
		FAQs	View and search Frequently Asked Questions
 My Profile	Account Settings	Logout	Logout of the DRGR System
		Manage My Account	View user account information
		Manage My Subscriptions	View and Edit email subscriptions
		Manage My Office	View and Edit your Office
		Switch Profile	Switch to another Grantee Profile

E. Summary of DRGR System Workflow

The dropdown menus for each DRGR module vary depending on the user’s role and privileges. The following figure depicts the typical DRGR System workflow. Work Plans, Personnel (Staff) Rates, and Invoices apply to TA Providers only. The sections below provide an introductory overview of the typical workflow for Action Plans, Financials, and Performance Reports, which are the modules where the majority of implementation activity occurs in the System. Information on these functions is outlined in detail in the applicable sections of the DRGR User Manual.



DRGR System Workflow



E1. DRGR Action Plans and Work Plans

To enter an Action Plan or a TA Work Plan in the DRGR System, the following key steps must occur:

Step	Entity Responsible	Task
1	HUD	HUD Headquarters (HQ) staff add Grant and Grantee Profiles to the DRGR System.
2	HUD	HUD Office of the Chief Financial Officer (CFO) staff add account information after the Grant Agreement is fully executed from HUD’s Line of Credit Control System (LOCCS).



3	Grantee	Grantee submits request for user accounts with appropriate user roles to CPD field staff in DRGR via the Administration module.
4	Grantee	After DRGR user accounts have been created, DRGR Grantee Administrators authorize access to DRGR Grantee User accounts in DRGR via the Administration module.
5	Grantee	<p>DRGR Grantee Users (not associated with a TA Provider) create an Action Plan in DRGR via the Manage My Grants module by:</p> <ul style="list-style-type: none"> • Entering overall narratives. • Entering projects to group activities. • Entering programs to group activities. • Entering activities with budgets, performance measures, and assigning said activities to the appropriate project.
6	Grantee	Grantee submits Action Plan in the DRGR System once completed. Grantee will repeat step 5 (above) when new activities must be added, or changes need to be made to existing activities.
7	HUD	HUD staff reviews the DRGR Action Plan. If edits are needed, HUD staff can reject the Action Plan, returning the Action Plan to the Grantee to be revised and resubmitted. Otherwise, HUD staff approve the Action Plan. HUD TA staff take approval action using the TA Work Plan rather than the Action Plan.
8	TA Provider	Upon HUD setup of the DRGR Action Plan, TA Providers create and submit TA Labor Categories and Rates for HUD approval. TA Providers also assign staff and other personnel to approve rates.
9	HUD	HUD TA staff review and approve Labor Rates, TA Requests, and TA Assignments before TA Providers can submit work plans.
10	TA Provider	Upon HUD approval of the TA Labor Rates, TA Requests, and TA Assignments, TA Providers create and submit TA work plans for HUD TA staff approval. TA Providers can also close, cancel, or put on hold any work plan. TA work plans created by HUD will automatically populate the Action Plan and obligate program funds.
11	HUD	HUD TA staff review and approve TA work plans. If edits are needed, HUD staff can reject or cancel the work plan.



E2. DRGR Drawdown

Upon HUD approval of the DRGR Action Plan, authorized Grantee Users can obligate funds to activities as well as create and approve vouchers in DRGR via the **Manage My Financials** module. TA Providers are not required to manually obligate funds by activity; funds are automatically obligated based on HUD approval of TA Work Plans.

Step	Entity Responsible	Task
1	Grantee	Grantee obligates funds to activities.
2	Grantee	Authorized Grantee Users create voucher in DRGR.
3	Grantee	Authorized Grantee Users review and approve voucher in DRGR.
4	HUD	If a voucher line item exceeds the drawdown threshold, it is forwarded to HUD for approval before being submitted to LOCCS.

E3. DRGR Performance Reports

The DRGR System automatically includes any activities in the DRGR performance reports if any funds were drawn down or obligated for those activities during the reporting period. To enter performance report data into DRGR via the **Manage My Grants** module, the following key steps must occur:

Step	Entity Responsible	Task
1	Grantee	Grantee adds the performance report for the upcoming due date if the DRGR System did not create the performance report automatically.
2	Grantee	Grantee enters progress narrative information to describe accomplishments across programs and projects.
3	Grantee	Grantee enters SF-425 Grant-level financial information, if necessary.
4	Grantee	Grantee enters information on activities with activity progress narratives, addresses assisted (if applicable), performance accomplishments, and financial updates.
5	Grantee	Authorized Grantee User submits performance report in DRGR once completed in accordance with the appropriation deadline. QPR submissions are typically due within 30 days after the end of each quarter but check program requirements for specific due dates.
6	HUD	HUD staff reviews the performance report. If edits are needed, HUD staff can reject the performance report, returning the performance report to the



Grantee to be revised and resubmitted. Once the performance report is approved, no further action is necessary.