Chapter 34: Data Uploads

Chapter 34: Data Uploads

This Chapter provides procedures for uploading data directly into DRGR using spreadsheets instead of entering the data manually across DRGR pages.

DRGR uploads can be accessed in three DRGR Modules:

- **Administration Module** – Access upload links from the dropdown menus
- **Manage My Grants Module** – Access uploads from Manage Action Plan and Manage Performance Report
- **Manage My Financials Module**- Access uploads from Search/Edit Obligations and Vouchers

TIP! HUD provides templates that must be used for data uploads. See the HUD Exchange for a list of current templates. All templates must be saved in the .CSV file format. See Section B2 for more tips.

This Chapter describes actions for Grantee Users and HUD Users, and is divided into subsections:

Grantee Users

Menu Option	Subsection	Action
Manage Action Plan	B1 – B3	Upload Action Plan, Projects and Activities, and TA Work Plans
Manage Performance Report	B4	Upload Performance Report accomplishments
Search/Edit Obligation	C1	Upload Obligations
Create a Voucher	C2	Upload New Vouchers
Upload User Requests	D1	Upload New and Edit Users
Upload Responsible Organizations	D2	Upload New and Edit Responsible Organizations
Upload	D4	Upload Batch Data

HUD Users

Menu Option	Section	Action
Manage Action Plan	B3	Upload TA Work Plans
Upload User Requests	D1	Upload New and Edit Users
Upload Staff Data	D3	Upload and Edit Staff Data
Upload	D4	Upload Batch Data

A. Data Uploads Overview

TIP! Refer to Report A42 to view existing Grantee User access to Grants.

Data Uploads offer DRGR Users the option of uploading data into DRGR in-lieu of entering the information into DRGR manually across multiple pages. For example, if a Grantee needed to create a voucher for several line items, or upload quarterly accomplishments across several activities, data upload templates can be used to upload the data directly into DRGR.

The upload feature is meant to save Grantees time by allowing them to enter larger volumes of data into a template and avoid having to navigate through multiple DRGR pages. If used properly, data upload templates can also be a great tool for Grantees to collect information that must be input into DRGR from their subgrantees and subrecipients. DRGR Users should use this Section of the User Manual with the supplemental DRGR Factsheet: Data Uploads, which is available under the Factsheet link online at https://www.hudexchange.info/drgr.

A1. Steps to Complete Data Uploads

The following steps describe the process for uploading data into DRGR. Each step is explained in more detail throughout this Chapter of the DRGR User Manual:

- Section A2: Download and enter all necessary data into the Upload Template(s) using local records and DRGR reports.
- Section B-D: Log into DRGR and navigate to the appropriate upload function.
- Section E1: Upload the data using the completed Upload Template.
- Section E2: Verify results of data upload.

A2. Data Upload Templates

DRGR Grantee users authorized to complete DRGR data uploads must use pre-designed Upload Templates found at https://www.hudexchange.info/resource/3703/drgr-data-upload-templates/. Users with advanced knowledge of .CSV file formats may create their own upload templates, so long as the created templates are identical to the pre-designed templates. The following criteria **MUST** be met in order for the DRGR System to successfully process data uploads:

- Files uploaded into DRGR must be .CSV formatted. To ensure the file is .CSV formatted prior to upload into the DRGR System, save the file as '.csv – comma delimited' file.
- Upload Templates are case-sensitive and should not contain any formatting (e.g., $ dollar signs, semi-colons, or other special characters).
- Users cannot alter the column order of the Upload Templates.
- The data entered into the Upload Templates must match the values that appear in the DRGR System (e.g., Activity Status = Underway; National Objective: Low/Mod). These fields typically correspond to the dropdown menus or radio buttons users see on their screen in DRGR.
- The data entered into the Upload Templates must also match the data already entered into the DRGR System by the Grantee, if applicable (e.g., when editing an activity, the existing Activity # already entered into DRGR must match the Activity # entered into the data Upload Template).

A3. Data Upload Types

DRGR supports the following data uploads:

- Regular Uploads – individual Upload Templates for each Upload Type (e.g., Action Plan Project, Voucher, etc.)
- Batch Data Uploads – multiple Upload Types in a single Upload Template

A list of Data Upload Types for all users can be found in the “DRGR Data Upload Types and Associated Columns Quick Guide” on the HUD Exchange.

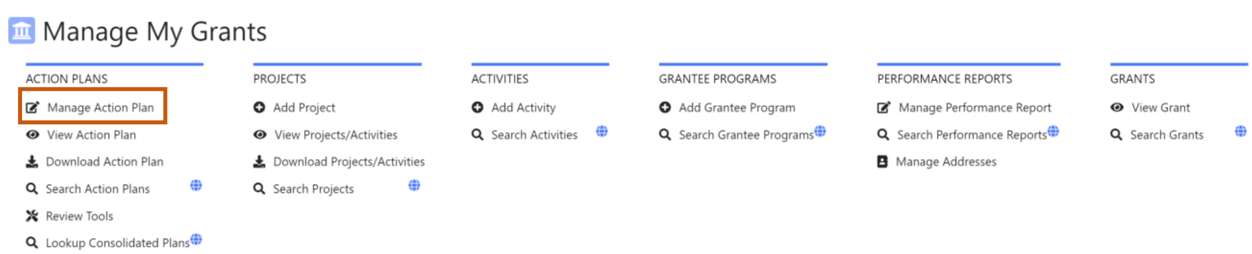
B. Manage My Grants Module Uploads

The following steps describe how to access the appropriate DRGR pages based on the Upload Template that is ready to be uploaded into the DRGR System.

B1. Grantee| Upload Action Plan and Activities

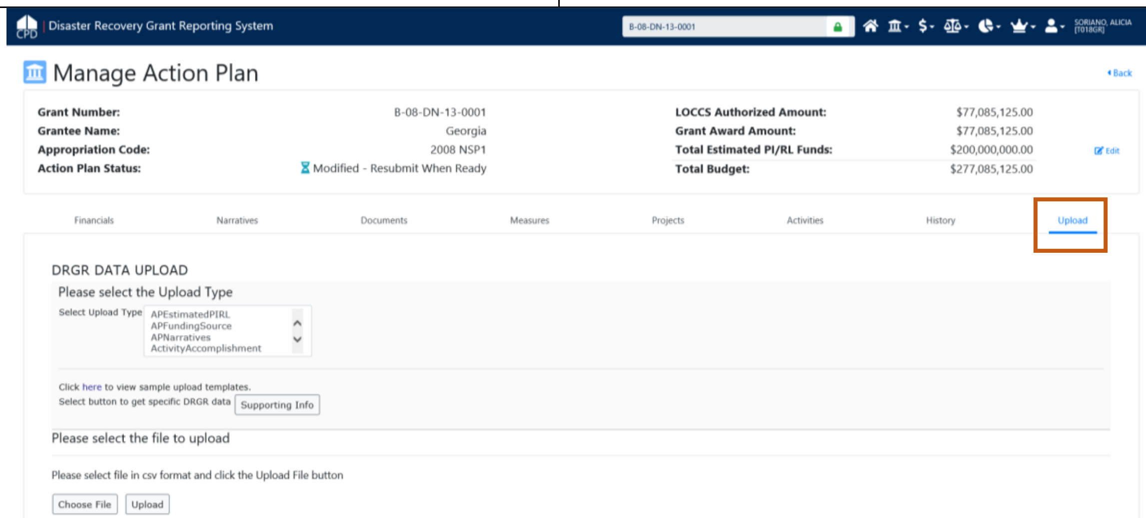
User Role: Grantee User	**Menu Option:** Manage Action Plan
Purpose: Allow Grantee Users to access Action Plan and Activity Uploads.	
Complete the following steps to access Action Plan and Activity Uploads:	

1 Navigate to the **Manage My Grants** module, locate the **Action Plans** menu, and select **<Manage Action Plan>**. The **“Manage Action Plan”** page will load.



2 On the **“Manage Action Plan”** page, select the “Upload” tab.

User Role: Grantee User	Menu Option: Manage Action Plan



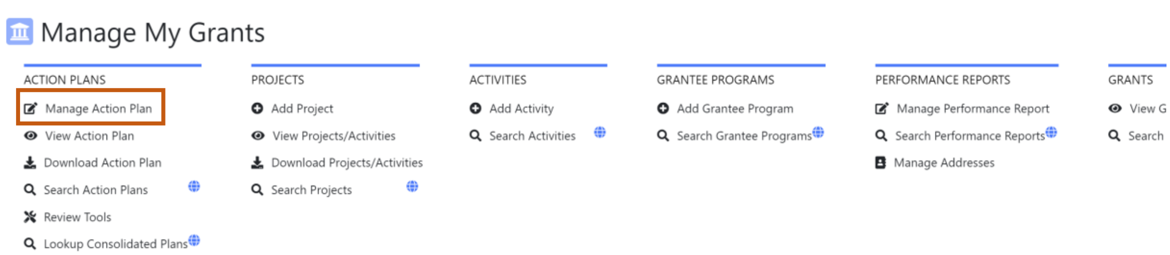
3 Proceed to Section E Completing Data Uploads to complete the process.

B2. Grantee| Upload Project

User Role: Grantee User	Menu Option: Manage Action Plan
Purpose: Allow Grantee Users to access Project Uploads.	

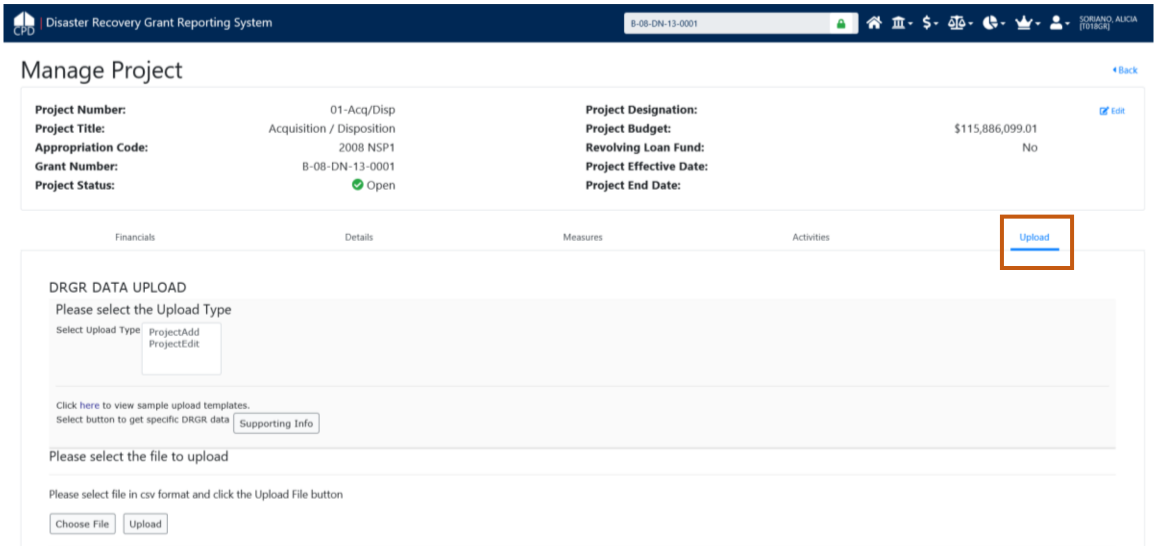
Complete the following steps to access Project Uploads:

1 Navigate to the **Manage My Grants** module, locate the **Action Plans** menu, and select **<Search Project>**. The **"Search Projects"** page will load. Select any project to edit, the **"Manage Project"** page will load.



2 On the **"Manage Project"** page, select the "Upload" tab.

User Role: Grantee User | **Menu Option:** Manage Action Plan



3 Proceed to Section E Completing Data Uploads to complete the process.

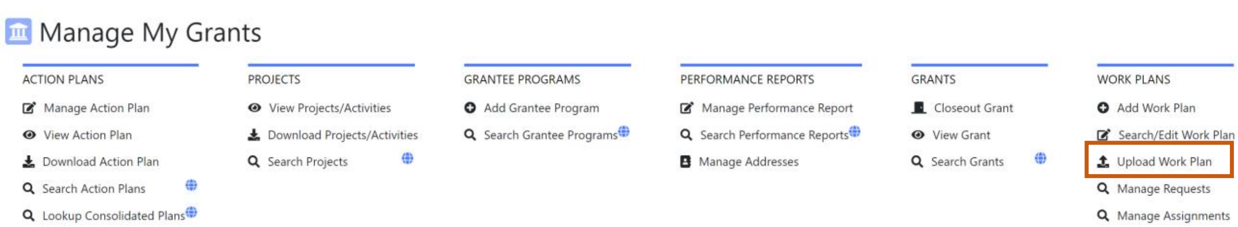
B3. Grantee and HUD Users| Upload TA Work Plan

User Role: Grantee and HUD User | **Menu Option:** Manage Action Plan

Purpose: Allow Grantee and HUD Users to access TA Work Plan Uploads.

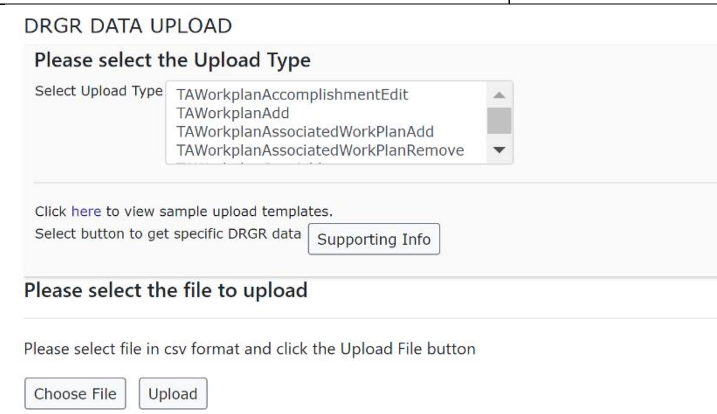
Complete the following steps to access TA Work Plan Uploads:

1 Navigate to the **Manage My Grants** module, locate the **Work Plans** menu, and select **<Upload TA Work Plan>**. The **"DRGR Data Upload"** page will load.



2 Once the **"DRGR Data Upload"** page loads, proceed to Section E Completing Data Uploads to complete the process.

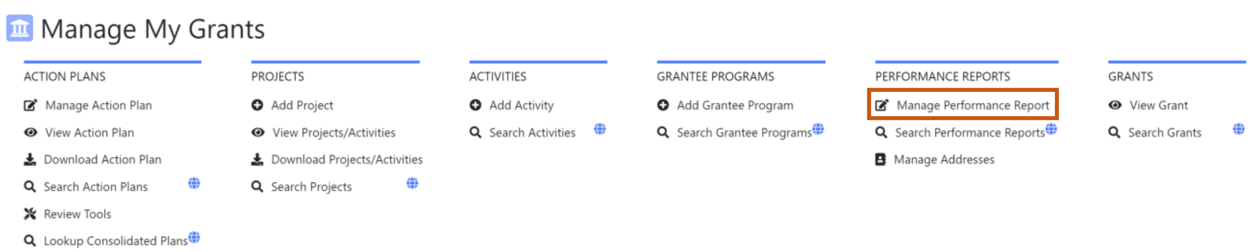
User Role: Grantee and HUD User	Menu Option: Manage Action Plan



B4. Grantee| Upload Performance Reports

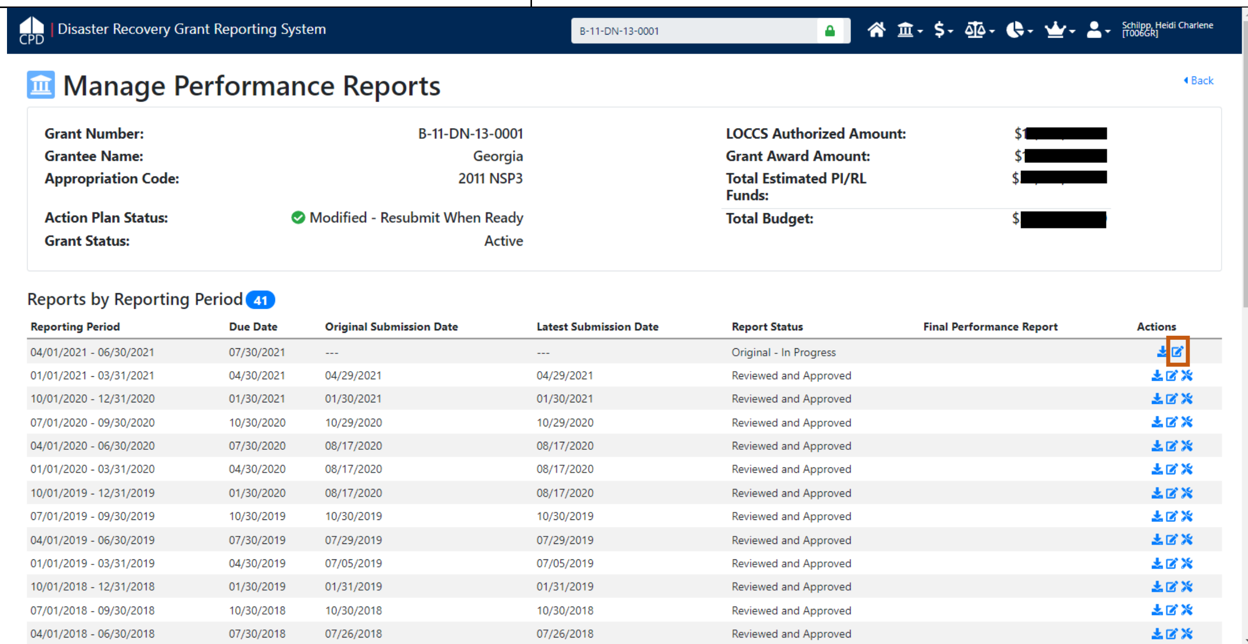
User Role: Grantee User	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to access Performance Report Uploads.	
Complete the following steps to access Performance Report Uploads:	

1 Navigate to the **Manage My Grants** module, locate the **Performance Report** menu, and select **<Manage Performance Report>**. The **"Performance Report"** page will load.

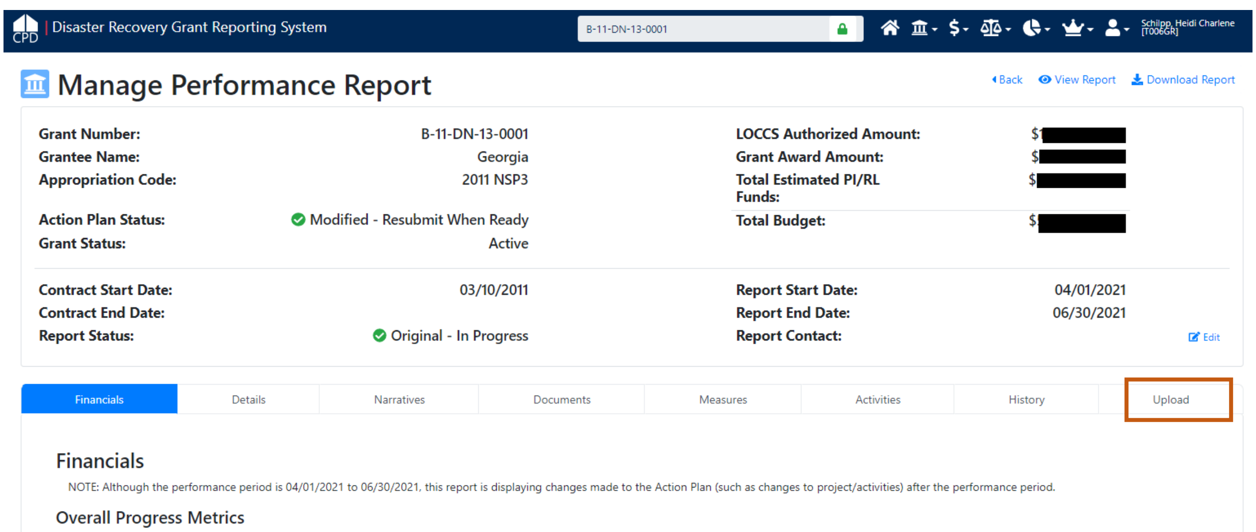


2 On the **"Performance Report"** page, select **<Manage>** under the "Actions" column next to the desired Performance Report.

User Role: Grantee User	Menu Option: Manage Performance Report



2 On the **"Edit Peformance Report"** page, select **<Upload>**.



3 Proceed to Section E Completing Data Uploads to complete the process.

C. Manage My Financials Module Uploads

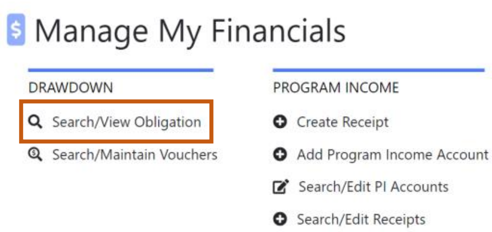
C1. Grantee| Upload Obligations

User Role: Grantee Drawdown User	Menu Option: Search/Edit Obligation
Purpose: Allow Grantee Users to access Obligation Uploads.	

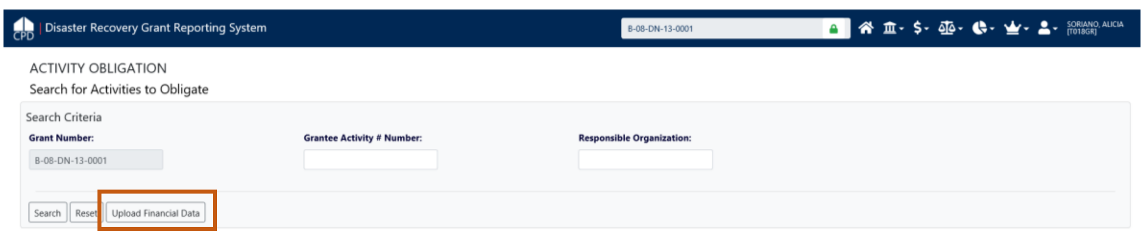
User Role: Grantee Drawdown User	Menu Option: Search/Edit Obligation

Complete the following steps to access Obligation Uploads:

1 Navigate to the **Manage My Financials** module, locate the **Drawdown** menu, and select **<Search/View Obligations>**. The **"Activity Obligation"** page will load.



2 On the **"Activity Obligation,"** select **<Upload Financial Data>.**



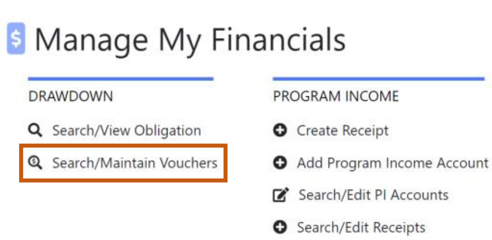
3 Proceed to Section E [Completing Data Uploads] to complete the process.

C2. Grantee| Upload Vouchers

User Role: Grantee Drawdown Request User	Menu Option: Create a Voucher
Purpose: Allow Grantee Users to access Voucher Uploads.	

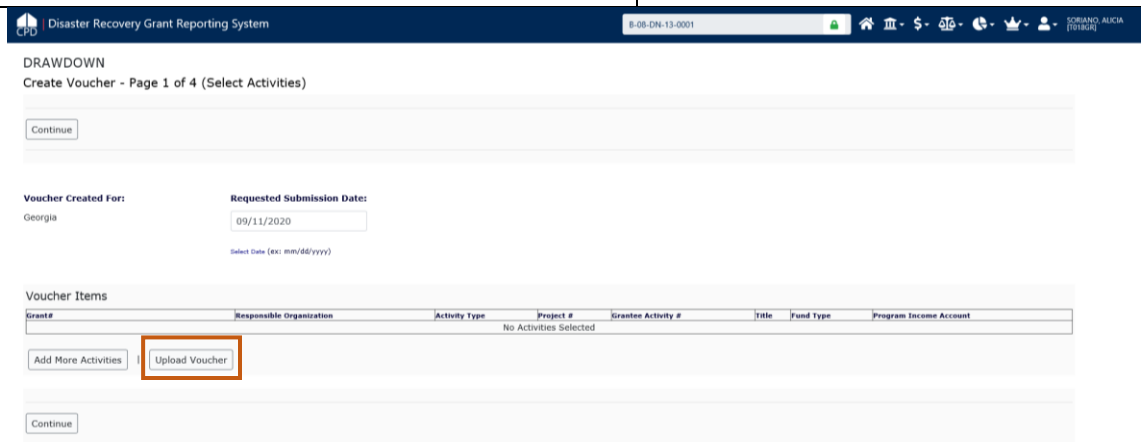
Complete the following steps to access Voucher Uploads:

1 Navigate to the **Manage My Financials** module, locate the **Drawdown** menu, and select **<Search/Maintain Vouchers>**. The **"Drawdown"** page will load.



2 On the **"Drawdown"** page, select **<Upload Voucher.>**

User Role: Grantee Drawdown Request User	**Menu Option:** Create a Voucher



3 Proceed to Section E [Completing Data Uploads](#) to complete the process.

D. Administration Module Uploads

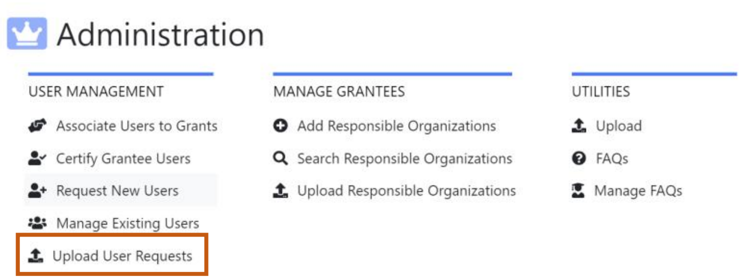
D1. Grantee and HUD | Upload User Requests

User Role: Grantee and HUD User Profile Request	**Menu Option:** Upload User Requests

Purpose: Allow Grantee and HUD Users to access User Request Uploads.

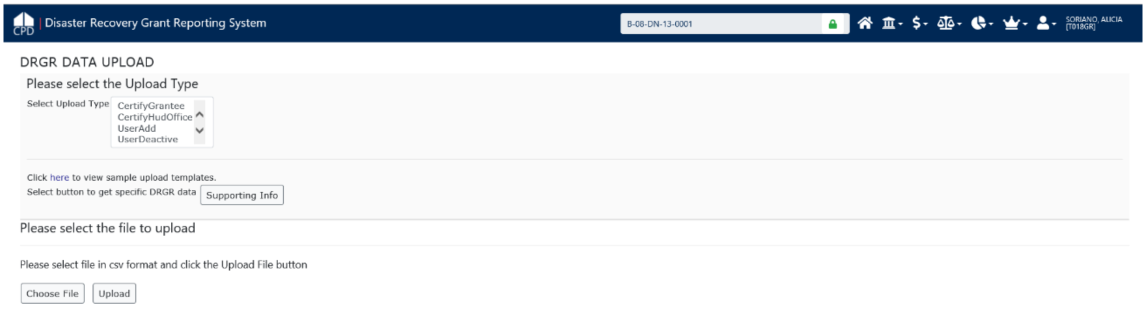
Complete the following steps to access User Request Uploads:

1 Navigate to the **Administration** module, locate the **User Management** menu, and select **<Upload User Requests>**. The **"DRGR Data Upload"** page will load.



2 Once the **"DRGR Data Upload"** page loads, proceed to Section E [Completing Data Uploads](#) to complete the process.

User Role: Grantee and HUD User Profile Request	Menu Option: Upload User Requests

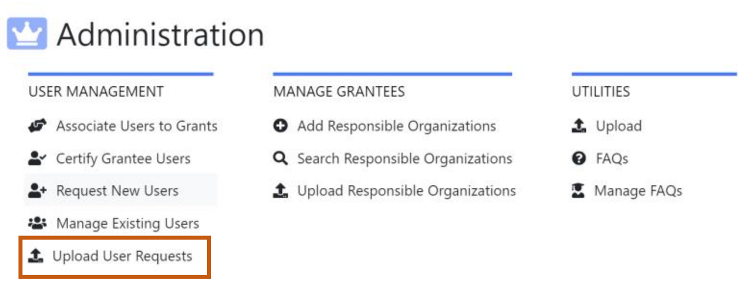


D2. Grantee | Upload Responsible Organizations

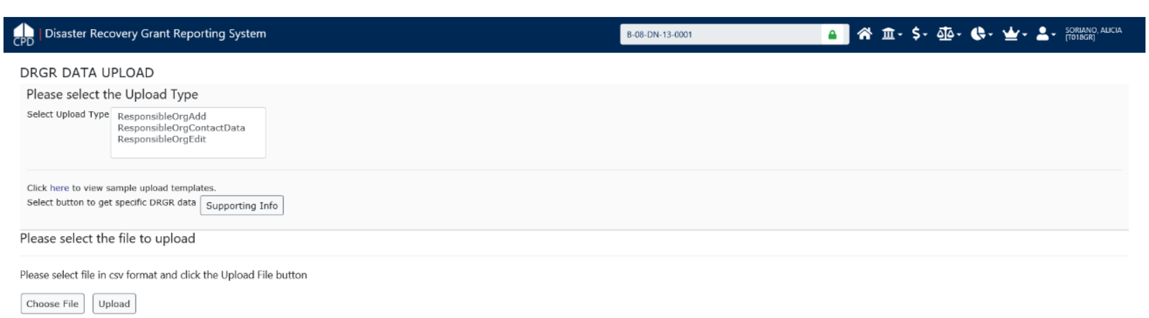
User Role: Grantee User	**Menu Option:** Upload Responsible Organizations
Purpose: Allow Grantee Users to access Responsible Organization Uploads.	

Complete the following steps to access Responsible Organization Uploads:

1 Navigate to the **Administration** module, locate the **User Management** menu, and select **<Upload User Requests>**. The **"DRGR Data Upload"** page will load.

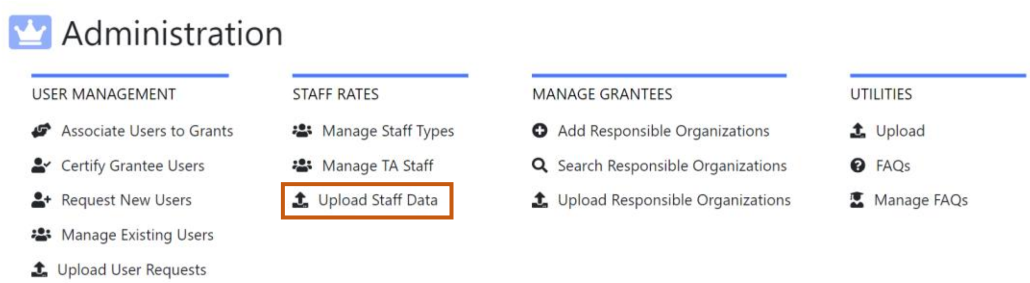


3 Once the **"DRGR Data Upload"** page loads, proceed to Section E [Completing Data Uploads](#) to complete the process.



D3. Grantee and HUD | Upload Staff Data

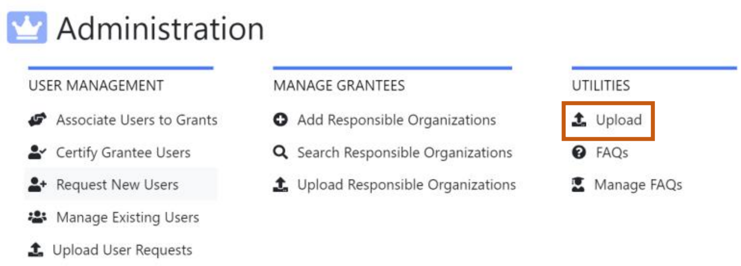
User Role: HUD User	**Menu Option:** Upload Staff Data
Purpose: Allow HUD Users to access Staff Data Uploads.	
Complete the following steps to access Staff Data Uploads:	
1 Navigate to the **Administration** module, locate the **Staff Rates** menu, and select **<Upload Staff Data>**. The **"DRGR Data Upload"** page will load. **TIP!** Users must have the Staff Rate role to perform these functions.	
2 Once the **"DRGR Data Upload"** page loads, proceed to Section E [Completing Data Uploads](#) to complete the process.	



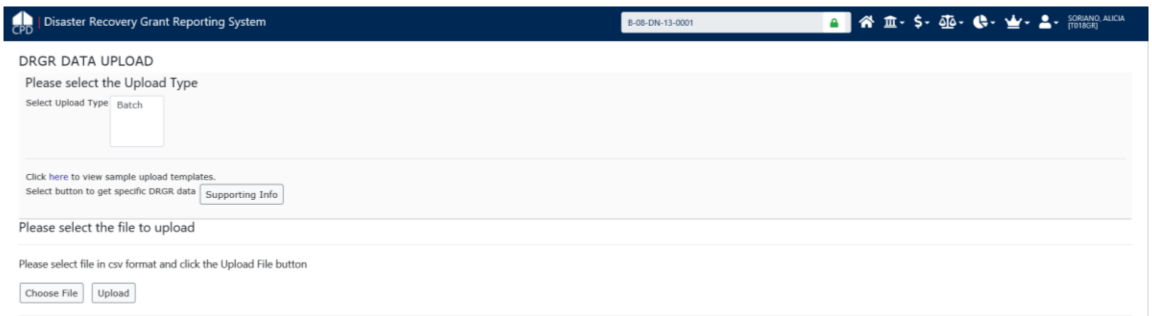
D4. Grantee and HUD | Batch Uploads

User Role: Grantee and HUD User	**Menu Option:** Upload
Purpose: Allow Grantee and HUD Users to access Batch Uploads.	
Complete the following steps to access Batch Uploads:	
1 Navigate to the **Administration** module, locate the **Utilities** menu, and select **<Upload.>**	

User Role: Grantee and HUD User	**Menu Option:** Upload



2 The **"DRGR Data Upload"** page will load.



3 Proceed to Section E [Completing Data Uploads](#) to complete the process.

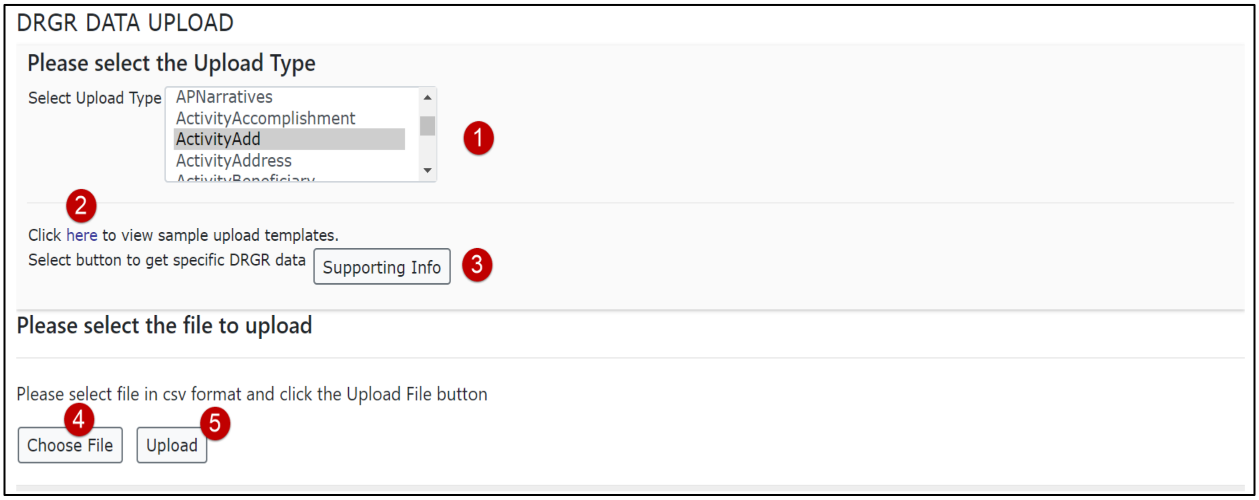
The remainder of this page is intentionally left blank.

E. Completing Data Uploads

DRGR Users should only complete the following steps after completing the steps in Sections B, C, or D.

E1. Grantee and HUD | Select Upload Template and File

The following page/options will load regardless of the Upload Template selected for upload.



#	Function
1	Select the Upload Type – this tells DRGR what Upload Template the user is trying to upload (type of data upload the user is attempting, and where to place the uploaded data).
2	**Optional:** Selecting the "here" link is optional and will navigate the user to the predesigned templates available for use at https://www.hudexchange.info/resource/3703/drgr-data-upload-templates/.
3	**Optional:** Selecting **<Supporting Info>** is optional and will allow users to see existing data already entered into DRGR. For example, if a user is not sure about the data, they have previously entered into DRGR, they can use the "Supporting Information" function. Users will be brought to a MicroStrategy page where they can run the report with the existing data. Grantees are encouraged to use this feature to assist with creating upload files; and/or to pull existing data such as DRGR Activity # and Responsible Organization names that can be used for uploads. **Note:** the "Supporting Information" files have additional reference data to help Grantees conduct an analysis and quality control for uploads. This information might include budgets and projected accomplishments. All extra columns must be deleted before any files are uploaded.
4	Select **<Choose File>** to locate the template the user has already completed and is attempting to upload (e.g., the file the user saved to their computer).
5	Select **<Upload>** to complete the upload for the template the user located in Step #4.

E2. Grantee and HUD | Verify Results of Data Upload

The following page/options will load regardless of the Upload Template selected for upload and will display after the steps in Section E1 are completed.

#	Function
1	Option to return to the previous screen (Upload Page) to upload another file.
2	Displays the total number of rows in the uploaded file.
3	Displays the total number of rows successfully uploaded from the uploaded file.
4	Displays the status of the upload: • "Completed Successfully" indicates that the upload was a success with no errors; or • "Completed with Errors" indicates that some or all rows were not uploaded successfully.
5	Shows the user the errors or successes of each row. To review error messages associated with each Data Upload Type, consult the "DRGR Data Upload Error Messages Quick Guide" on the HUD Exchange.
6	Shows the user which data was successfully uploaded. If the "Status of the Uploading" returned "Completed with Errors", selecting **<View Upload Data>** will show the user only the line items that uploaded successfully.