Chapter 7: My Profile

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Chapter 7: My Profile

This Chapter provides procedures for the functions under **My Profile**. **My Profile** functions allow users to view his/her roles and associated grantee profile(s), make requests for changes to the profile contact information, manage subscriptions, logout of DRGR, and, for users with access to more than one Grantee, switch profiles.

This Chapter describes actions for Grantee Users and HUD Users and is divided into subsections. The following actions are covered in this Chapter:

Grantee Users and HUD Users

Menu Option	Subsection	Action
My Profile	A	Access My Profile menu
Logout	B	Logout
Manage My Account	C	Request edits to profile information and check user roles
Manage My Subscriptions	D	Edit subscription preferences by opting in or out of subscriptions
Switch Profile	E	For users with access to multiple Grants, switch profiles

A. Access My Profile

The **My Profile** module includes the **<Logout>**, **<Manage My Profile>**, and **<Manage My Subscription>** functions for all users. For users with access to multiple Grants, the **My Profile** functions also include a link to **<Switch Profiles>**.

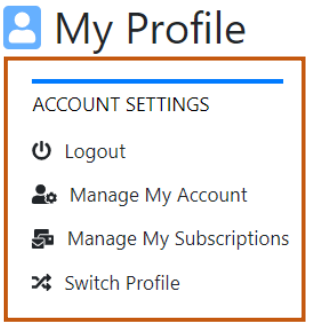
A1. Grantee and HUD | Access My Profile

User Role: Grantee User and HUD User	**Menu Option:** **My Profile**
Purpose: Allow Grantee Users and HUD Users access to functions under **My Profile**.	

Complete the following steps to access My Profile:

1 In the DRGR System, select the **My Profile** module, or icon, located in the navigation menu.

2 This opens the dropdown menu items for **My Profile**. The System displays the relevant menu items based on user type and user roles.



B. Logout

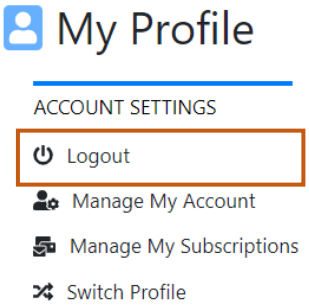
It is important for both Grantee users and HUD users to logout of DRGR using the **<Logout>** link under **My Profile**. Ending a DRGR session by closing the browser or letting the session expire due to lack of action over a twenty (20) minute period does NOT securely end the session and will cause a user to be locked out of its account for up to a thirty (30) minutes. The following subsection explains how to logout of DRGR properly.

TIP! Any user locked out of DRGR for more than thirty minutes can e-mail DRGRHelp@hud.gov and ask for a "Session reset."

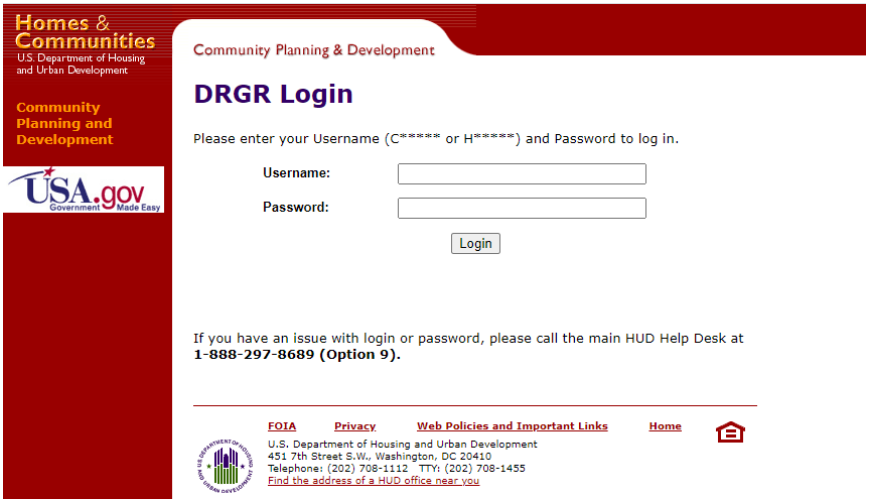
B1. Grantee and HUD | Logout

User Role: Grantee User and HUD User	**Menu Option:** Logout
Purpose: Allow Grantee Users and HUD Users to log out securely from DRGR.	
Complete the following steps to logout securely from DRGR:	

1 In the **My Profile** menu, select **<Logout>**.



2 This ends the DRGR session securely and redirects the user to the **"Login"** page.

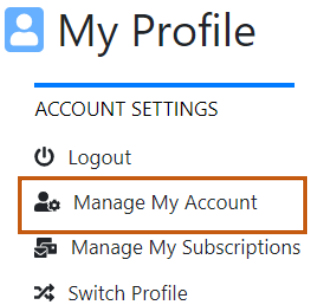


C. Manage My Account

C1. Grantee and HUD | Manage My Account

User Role: Grantee User and HUD User	**Menu Option:** Manage My Account
Purpose: Allow Grantee Users to request edits to contact information and check user roles.	
Complete the following steps to update contact information and check user roles.	

1 In the **My Profile** menu, select **<Manage My Account>**.



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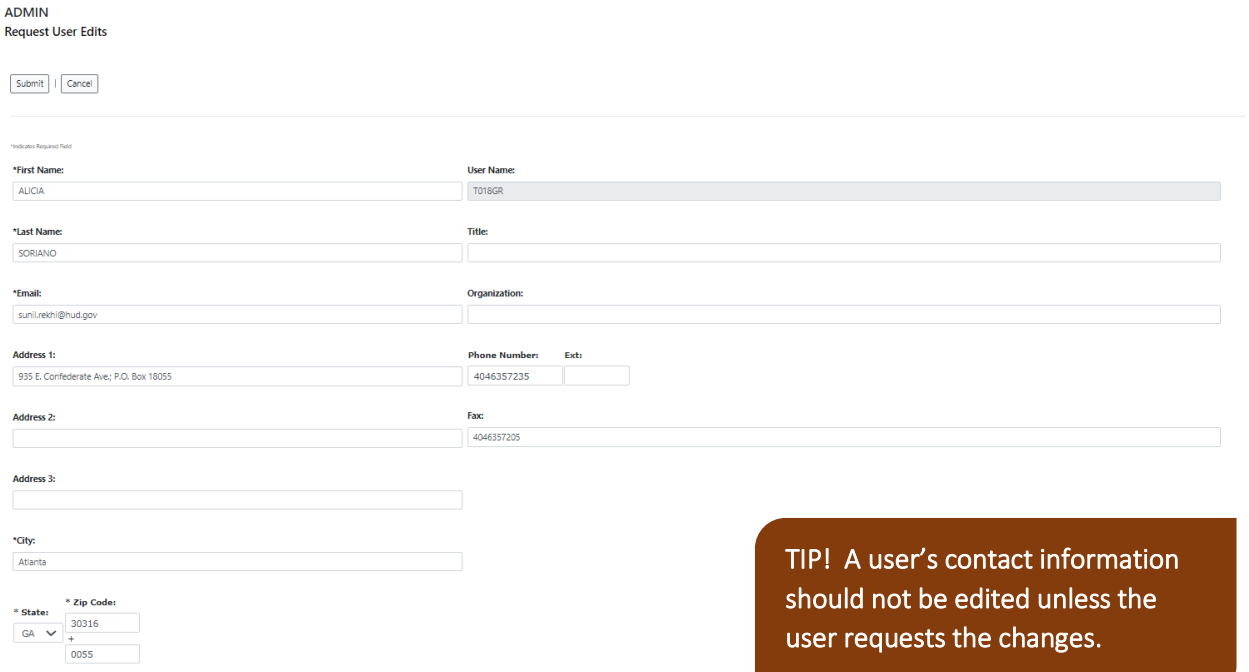
2 On the **"Manage My Account"** page, users can edit contact information, however, changes to user's first and last name, user name, and profile rights require DRGR Administrator approval. Information marked with an asterisk is mandatory.



TIP! A user's contact information should not be edited unless the user requests the changes.

3 Once information is updated, users select **<Submit>** to save information.

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4 To check user roles assigned to a user's account, the user may scroll down on the **"Manage My Account"** page to review the assigned user roles. More information on user roles can be found in Chapter 5 – User Management and Certifications. In the Grantee example below, this user has the "Request Drawdown", "Submit Action Plan", "Submit Performance Reports", "User Profile Request", and "Update FAQ roles." This view also shows that the user's account is Active. NOTE: The Staff Rate Role is applicable to TA Providers only. The Update FAQ role is applicable to HUD staff only.

EX. GRANTEE PROFILE -

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

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	Submit Voucher Docs to HUD	Active
Georgia	28	☐	☐	☑	☐	☑	☑	☐	☐	☑	☑	☐	☑

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf
None
Add Additional Documents | Remove Selected Document

Comments:

Submit | Cancel

EX. HUD PROFILE:

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

HUD Profile:

HUD Office	HUD Program	View Only	HQ Admin	Super User	Approve Drawdown	User Profile Request	Update FAQ	Office of Inspector General	Active
LOS ANGELES	100226	☐	☐	☐	☐	☑	☐	☐	☑

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	Submit Voucher Docs to HUD	Active
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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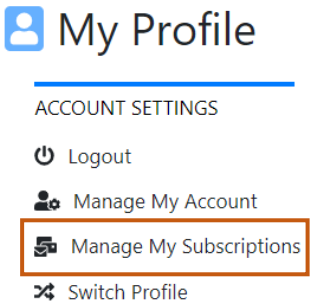
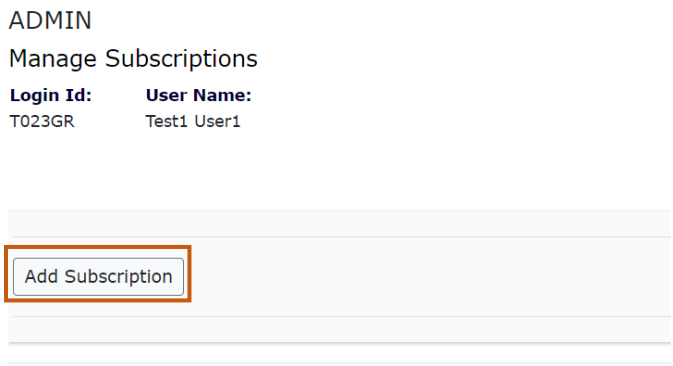
D. Grantee and HUD | Manage My Subscriptions

Grantee Users and HUD Users may opt in or out of subscriptions that provide alerts when certain actions are completed in DRGR. See subsection D2 for a list of subscriptions available in the System.

D1. Grantee and HUD | Manage My Subscriptions

User Role: Grantee User and HUD User	**Menu Option:** Manage My Subscriptions
Purpose: Allow Grantee Users and HUD Users to edit subscription preferences.	
Complete the following steps to edit subscription preferences:	
1 In the "**My Profile**" menu, select **<Manage My Subscriptions>**. 	
2 A new page will load. Select **<Add Subscription>**. 	

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3 A new **"Add Subscriptions"** page will load, and users can make preferences for managing their subscriptions. Users can:

(a) set a custom subscription name;

(b) choose the event that they would like to be notified about from the dropdown list of options;

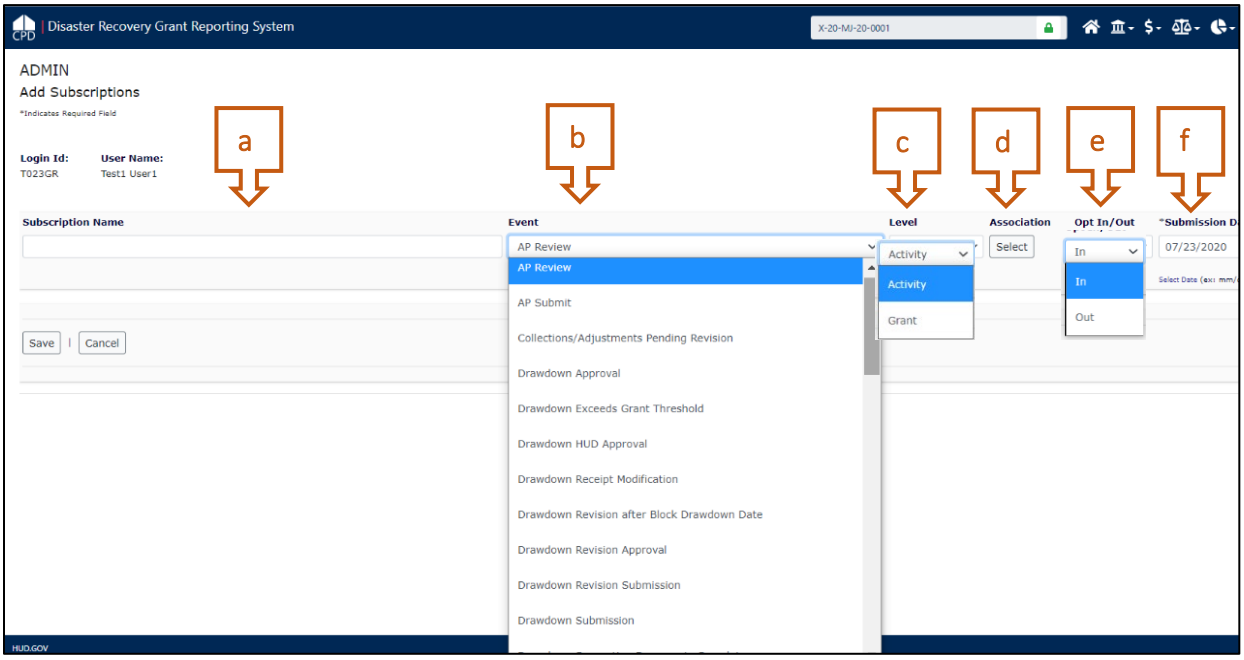
(c) select whether subscriptions will be delivered for an Activity or a Grant from the **<Level>** dropdown field;

(d) choose the Activity or Grant with which the subscription should be associated by clicking on **<Select>**;

(e) opt in or out of the subscription from the dropdown field; and

(f) set the start of the subscription period.

Note: The list of available subscriptions is provided at subsection D2 below.



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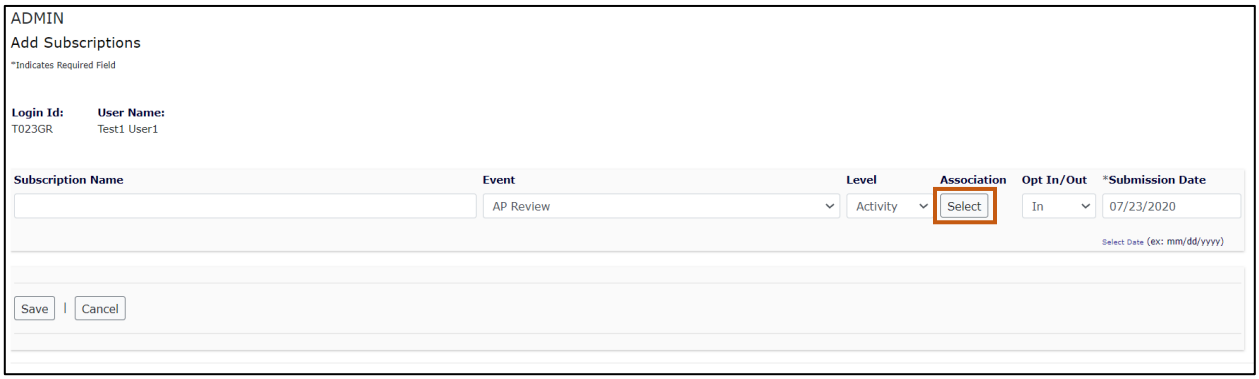
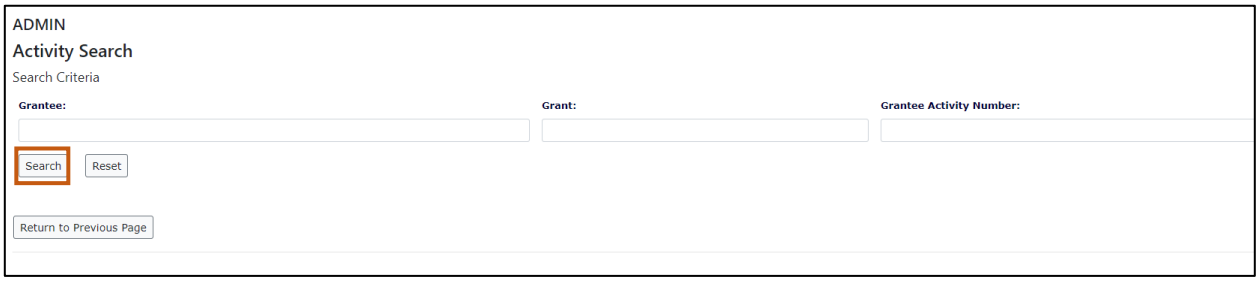
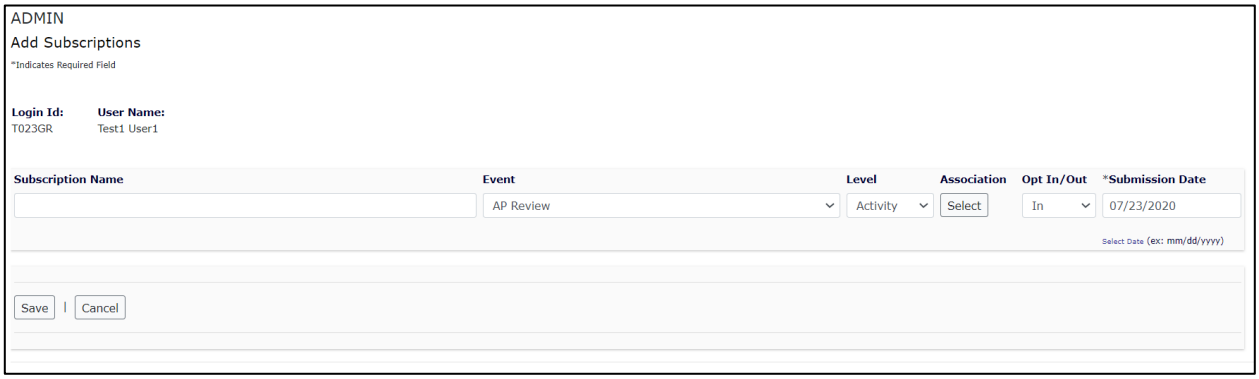
4 When selecting the Activity or Grant to which the subscription will be applied (step 3d above), click on **<Select>** to search the Activities or Grants.



5 A new **"Activity Search"** page will load. On this page, users may enter information to refine their search or leave the fields blank and simply select **<Search>**. A list of Activities or Grants will be returned from which the user may select.



6 After the user has populated all fields on the **"Add Subscriptions"** page, select **<Save>** to activate the subscription.



D2. Grantee and HUD | List of Available Subscriptions

The following is the list of available subscriptions on the **"Add Subscriptions"** page under **Manage My Subscriptions**. By adding a subscription for one or more of these actions, users will be notified when activity occurs on these functions.

AP Review
AP Submit
Collections/Adjustments Pending Revision
Drawdown Approval
Drawdown Exceeds Grant Threshold
Drawdown HUD Approval
Drawdown Receipt Modification
Drawdown Revision after Block Drawdown Date
Drawdown Revision Approval
Drawdown Revision Submission
Drawdown Submission
Drawdown Supporting Documents Complete
Drawdown Supporting Documents InComplete
Drawdown Supporting Documents Request
Drawdown Supporting Documents Review Request
Drawdown Supporting Documents Submit
Drawdown Supporting Documents Undo
Grant Checklist Approve
Grant Checklist Reject
Grant Checklist Submit
New User Request completed
New User Request pending HQ completion
New User Request pending review
New User Request rejected
New User Request rejected by HQ
QPR Review
QPR Submit
Receipt Creation
Staff Rate Approve
Staff Rate Reject
Staff Rate Submit
TA Work Plan Approve
TA Work Plan Submit
TA Workplan Reject
Update User Request completed
Update User Request pending HQ completion
Update User Request pending review
Update User Request rejected by HQ
User Deactivation Request completed
User Deactivation Request pending HQ completion
User Deactivation Request pending review
User Deactivation Request rejected
User Deactivation Request rejected by HQ

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E. Grantee and HUD | Switch Profile

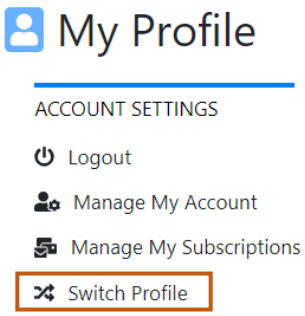
E1. Grantee and HUD | Switch Profile

In DRGR, users may have access to multiple Grants and, therefore, multiple profiles.

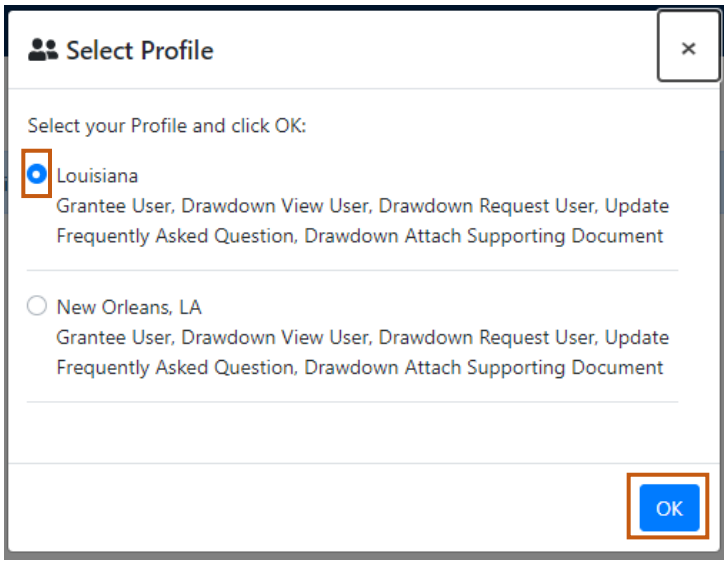
User Role: Grantee and HUD User	**Menu Option:** Switch Profile
Purpose: Allow Grantee and HUD Users to switch between DRGR profiles.	

Complete the following steps to switch between profiles:

1 In the **My Profile** menu, select **<Switch Profile>**.



2 The **"Select Profile"** box will display. Choose the desired profile and select **<OK>**.



Note: The HUD approved roles associated with each profile are included in the "Select Profile" window. The list may not include pending roles.