



Linking Services, Solutions, Communities

Online Data Collection System (OLDC) Assignment Delegation User Guide

October, 2012

The Grants Center of Excellence

www.grantsolutions.gov

OLDC ASSIGNMENT DELEGATION USER GUIDE

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NOTES:

OLDC ASSIGNMENT DELEGATION USER GUIDE

About this Guide

The *Online Data Collection (OLDC) Assignment Delegation User Guide* was developed to assist with the administrative roles of creating new users, assigning job types and report types, assigning additional roles, copying permissions, deleting users, and managing passwords for staff.

Guide Components

This guide contains the following sections:

- Topic 1: Add New User
- Topic 2: Edit Permissions
- Topic 3: Copy Assignments
- Topic 4: Delete User
- Topic 5: Password Administration

NOTES:

Introduction

OLDC is a role-based system, which means that permissions can be customized to meet the needs of each person. All users are given a Job Type (a title in the system such as Grant Director) which consists of a group of roles (assigned permission). For example, the Data Entry Job Type contains the roles create, edit, validate, revise, and attach documents to report forms. Other Job Types have fewer capabilities, but are often assigned additional roles. For example, the Grant Director has the Certify role but is also sometimes given the Submit role.

The Assignment Delegation module allows a person with the appropriate roles to create new accounts or modify existing ones. Each account must have at least one program, grantee organization, and Job Type assigned. This can be achieved through the “Edit Assignments” or the “Copy Assignments” section. The “Edit Assignments” section allows the administrator to assign programs, grantee organizations, and Job Types to a new user while the “Copy Assignments” section provides the capability to copy all permissions from an existing user to a new user. Each option is fully discussed in this manual.

TIPS

For more information about Job Types and Roles, see [Appendix A: Job Types and Roles](#).

Add New OLDC Account

Persons with the appropriate roles have the capability to add new OLDC users. OLDC Leads may create the following types of accounts:

- **Federal Leads:** Create any Federal user (new and existing employees), contractors, or non-Federal users.
- **Contactoer Leads:** Create accounts for existing Federal employees, contactors or non-Federal users.
- **Grantee Leads:** Create non-Federal users.

Before creating a new user, search the “Edit Current User” list to ensure a person does not already have an OLDC account.

OLDC Leads should use the **Person Search** before creating a new Federal or contract user to ensure the person does not already have an ID in Secure Sign-In.

DEFINITION

Existing Federal:

Employee has already been registered in the ACF payroll system. GATES PAs are able to see the record in “Staff & Roll Assignments” and OLDC Leads can search and find the record using the “Person Search”.

New Federal:

Employee has not been registered in the ACF payroll system. Their record does not appear in GATES “Staff & Roll Assignments” or in the OLDC “Person Search”.

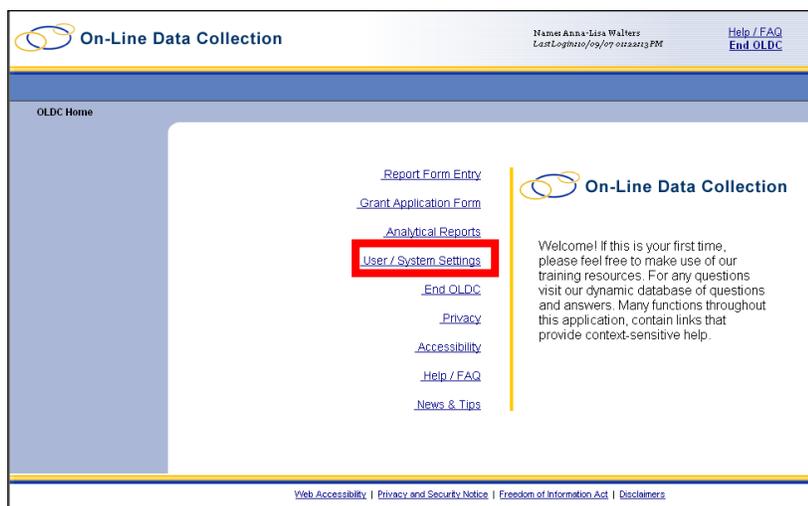
Add Existing User (Federal or Contractor)

Staff with Secure Sign-In access to GATES will use the same ID and password for OLDC. They do not receive e-mail notification when their OLDC account is created. Instead, the OLDC button appears under the GATES button in Secure Sign-In. The OLDC Lead who created the account receives e-mail confirmation of account creation.

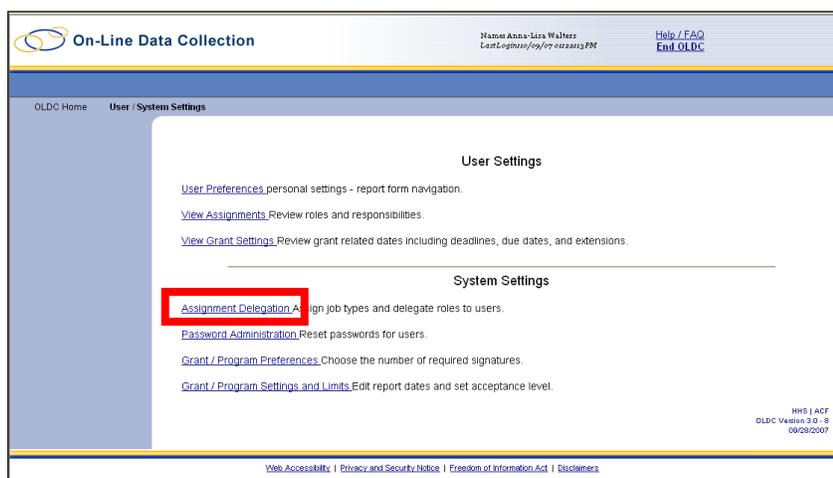
Existing Federal users without GATES access receive e-mail notification when their OLDC account is created. The OLDC Lead also receives an e-mail confirming account creation.

To add an existing **Federal** or **Contract** user to OLDC, complete the following steps.

1. From “OLDC Home”, click **User/System Settings**.



2. The “User/System Settings” screen displays. Under “System Settings”, click **Assignment Delegation**.



- The “Roles and Assignments” screen displays. Under the *Add New User* section, click the **Person Search** button.

- The “Person Search” screen displays. The first step in finding a user is to enter search criteria. The criteria section provides several possible options. You may enter one of the following:

- User ID (if known)
- First Name **AND** Last Name
- Select Program
 - ◆ Grantee (optional) – Grantee can only be selected after Program
- Zip Code
- City **AND** Postal code
- E-mail Address

TIPS

If you enter criteria in a row containing more than one text box that is separated by the word **AND** (for example, First Name **AND** Last Name), both text boxes must be completed for the search to proceed.

Partial Name Search - The Name search only searches for the first letter of the first name and the first three letters of the last name.

You may complete as many fields as you feel necessary (for example, Program and Zip Code)

5. Once search criteria are entered, click the **Person Search** button.

Person Search

Step 1:
Enter Search Criteria in at least 1 of the rows. Then press "Person Search" button for results.

User ID:

First Name: AND Last Name:

Select Program:
Select Grantee: (Optional)

Zip Code: -

City: AND Postal Code:

Email Address:

Person Search Refresh Screen Help

Step 2:
"Select" the person to add and press the "Select Person" button.

Select:	Last Name, First Name, MI:	Location:	Email Address:	User ID:	User Type:
<input type="checkbox"/>	Miller, Arthur, C	Washington, DC	arthur.miller@acf.hhs.gov	AMILLER1	Contractor
<input type="checkbox"/>	Miller01, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER01	Contractor
<input type="checkbox"/>	Miller02, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER02	Contractor
<input type="checkbox"/>	Miller03, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER03	Contractor

TIPS

Click the **Refresh Screen** button to clear any criteria currently on the form. Click the **Help** button for more information about using the Person Search.

6. Under Step 2, all possible results display. To select a user, click the check box next to their name and click the **Select Person** button.

SEARCH SUCCESSFUL

User ID:

First Name: arthur AND Last Name: miller

Select Program:
Select Grantee: (Optional)

Zip Code: -

City: AND Postal Code:

Email Address:

Person Search Refresh Screen Help

Step 2:
"Select" the person to add and press the "Select Person" button.

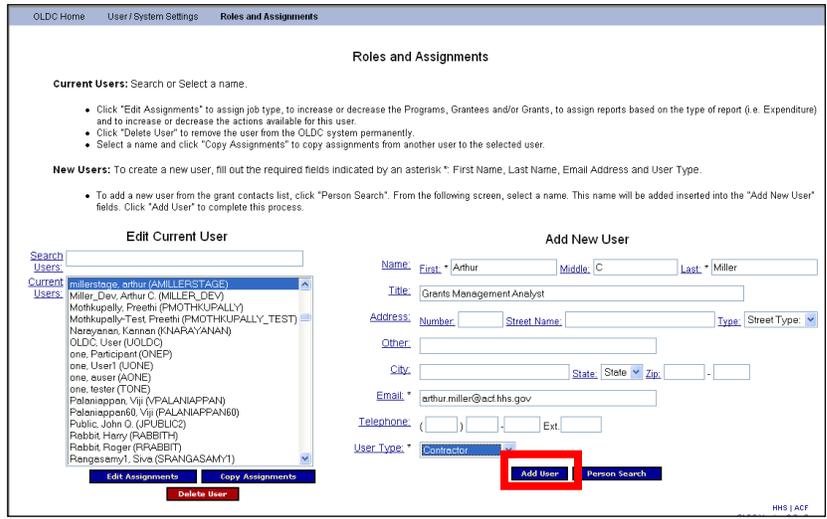
Select:	Last Name, First Name, MI:	Location:	Email Address:	User ID:	User Type:
<input checked="" type="checkbox"/>	Miller, Arthur, C	Washington, DC	arthur.miller@acf.hhs.gov	AMILLER1	Contractor
<input type="checkbox"/>	Miller01, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER01	Contractor
<input type="checkbox"/>	Miller02, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER02	Contractor
<input type="checkbox"/>	Miller03, Arthur, C		arthur.miller@acf.hhs.gov	AMILLER03	Contractor

Select Person

TIPS

In Step 2, only one user's name can be selected at a time.

- The “Roles and Assignments” screen displays. The new user’s name and e-mail information appear in the “Add New User” section. Click the **Add User** button.



- A pop-up message displays. Click **OK**.



Add New User (Federal, Contractor, or Grantee)

OLDC Leads with the appropriate permissions may create new user accounts.

Prior to creating a new account from the “Add User” section, search the “Edit Current User” list and the “Person Search” to ensure the customer does not already have an existing account.

To create a new OLDC account, complete the following steps:

1. Navigate to the “Roles and Assignments” screen, “Add New User” section.

The screenshot shows the 'Roles and Assignments' interface. At the top, there are instructions for 'Current Users' and 'New Users'. Below this, there are two main sections: 'Edit Current User' and 'Add New User'. The 'Edit Current User' section features a search bar and a list of users, including 'AddUser Test, Senthil (SADDUSERTEST)', 'Adm1, Gatesoldc (GATESOLDCADM1)', and others. The 'Add New User' section contains a form with fields for Name (First, Middle, Last), Title, Address (Number, Street Name, Type), Other, City, State, Zip, Email, Telephone, and User Type. There are also buttons for 'Edit Assignments', 'Copy Assignments', 'Delete User', 'Add User', and 'Person Search'.

2. Type the user’s **First Name**.
3. Type the user’s **Middle Initial** (optional).
4. Type the user’s **Last Name**.
5. Type the user’s **Title** (only required if person needs signature authority).
6. Type the user’s **Address** (optional).
7. Type the user’s **Telephone** (optional)
8. Type the user’s **E-mail address**.

TIPS

Verify e-mail addresses are correct as new user account information is sent via e-mail.

9. Select the **User Type** (Federal and Contract staff only).

IMPORTANT!

Only Federal staff is able to see the **Federal** option in the User Type drop-down menu.

Grantees do not see the User Type drop-down menu as they are only able to create other Grantees (Non-Federal).

10. Click the **Add User** button. A Rules of Behavior warning message appears. Click **OK**.

11. The “A new user has been added” message box appears. Click **OK**.



TIPS

OLDC automatically creates new User IDs and Passwords:

The Grantee (Non-Federal) - User ID convention is Last Name+First Initial (for example John Smith would be SMITHJ)

The Federal and Contract - User ID convention is First Initial+Last Name (John Smith would be JSMITH).

Edit Assignments

Once a new user is added to the system, the next step is to assign a program, grantee organization, and and *Job Type*. A Job Type is an OLDC title that contains a group of permissions called *Roles*. There are currently ten Job Types[†] in OLDC:

Grantee Only	Federal Only
Data Entry Person	Regional Office Grants Officer
Authorized Official	Regional Office Grants Specialist
Grant Director	Central Office Grants Officer
Grant Administrator	Central Office Grants Specialist
View-Only	Auditor

[†]See Appendix A for more detail on Job Types and Roles

Assign Program and Job Type

After a new user is created, their name automatically appears selected at the top of the “Edit Current User” box. To grant or edit permissions, complete the following steps.

1. Select the user’s name from the “Edit Current User” box.

Roles and Assignments

Current Users: Search or Select a name.

- Click "Edit Assignments" to assign job type, to increase or decrease the Programs, Grantees and/or Grants, to assign reports based on the type of report (i.e. Expenditure) and to increase or decrease the actions available for this user.
- Click "Delete User" to remove the user from the OLDC system permanently.
- Select a name and click "Copy Assignments" to copy assignments from another user to the selected user.

New Users: To create a new user, fill out the required fields indicated by an asterisk *. First Name, Last Name, Email Address and User Type.

- To add a new user from the grant contacts list, click "Person Search". From the following screen, select a name. This name will be added inserted into the "Add New User" fields. Click "Add User" to complete this process.

Edit Current User

Search:

Users:

Current User:

Users:

- Post/Junk (PROG)
- Gonzalez, Winston (W.GONZALEZ)
- G_Admin, Dads (G_ADMIN)
- G_Director, Dads (G_DIRECTOR)
- G_View, Dads (G_VIEW)
- Hess99, Paul E. (HSS299)
- Huey, Baby (BHUEY)
- Internal, Oldc (OLDC_INTERNAL)
- Junk, Junk (JUNK)
- Kausnik, Saket (KAUSHIK)
- Kesavadas, Chenfil (KESAVADAS)
- Kudaravalli, Krishnamohan (KUDARAVALLI)
- Kuruvilla, Jacob (KURUVILLA)
- m,h (M)
- Miller, Arthur C. (AMILLER1)
- n
- AGE)

Add New User

Name: First: Middle: Last:

Title:

Address: Number: Street Name: Type: Street Type:

Other:

City: State: Zip:

Email:

Telephone: () - Ext:

User Type:

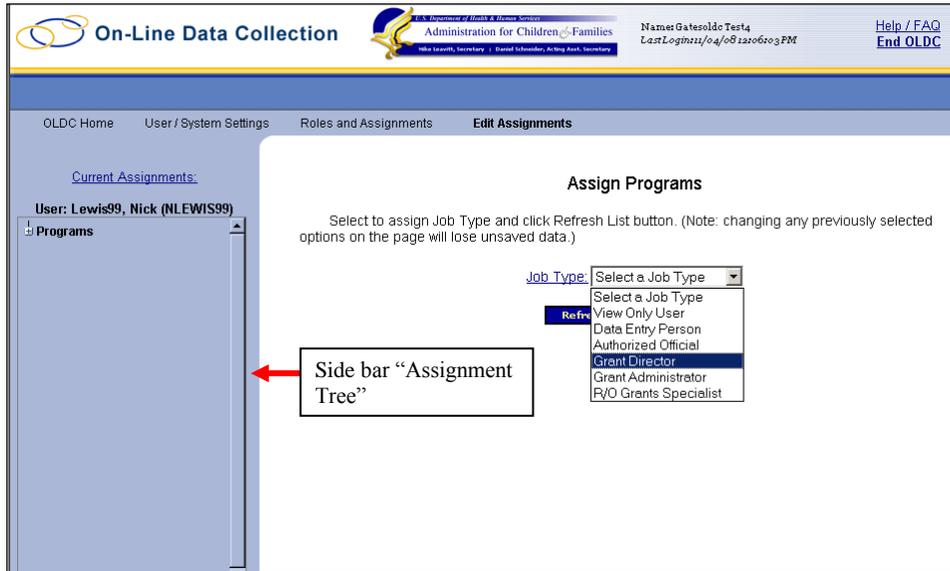
TIPS

Names in the Edit Current User list are sorted alphabetically by last name.

2. Click the **Edit Assignments** button.

Program Level Assignments

3. The “Assign Programs” screen displays. For new users without any previous assignments, the **left side bar** is blank. As permissions are added, the assignment “tree” grows allowing the OLDC Lead to navigate permissions directly from the side bar.



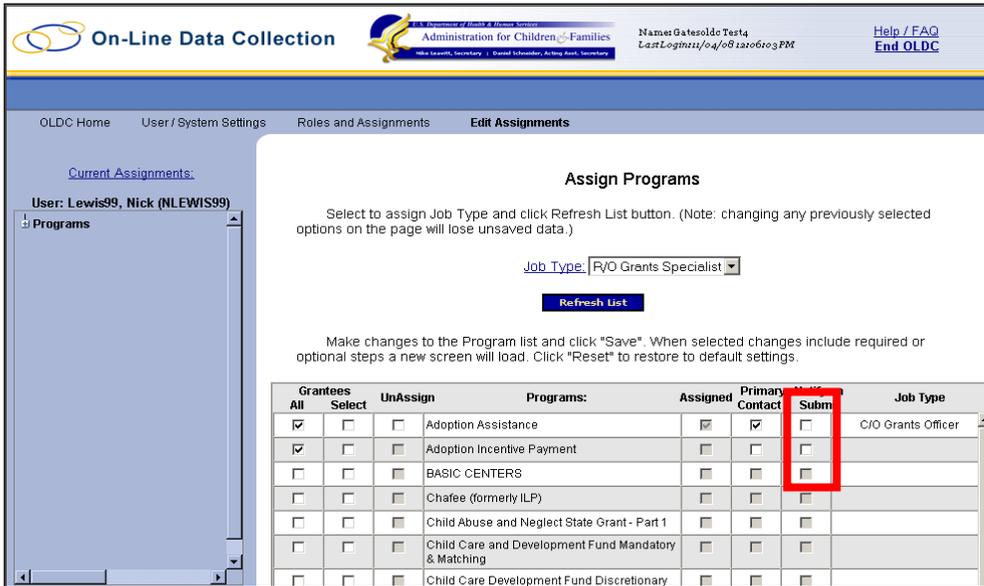
4. Select a Job Type from the drop down list and click the **Refresh List** button.
5. The “Program List” displays. Assign at least one Program from the list (multiple programs may be selected at one time). The Programs list provides the option to choose **All** grantees or **Select** grantees.
 - a. Choosing a checkbox under the **All** grantees column assigns all grantees available to the OLDC Lead for a Program (i.e. the OLDC Lead for Region V is able to assign all Region V grantees at once).
 - b. Choosing a checkbox under the **Select** grantees column allows the OLDC lead to assign individual grantees.
 - c. To Unassign a Program, click the Unassign checkbox next to a Program.

TIPS

If multiple Programs need to be assigned, but not all Programs require the same Job Type, select the first group of Programs and click **Save**. Next, change the Job Type from the “Assign Programs” screen and select the second group of Programs. Click **Save**. Continue as necessary.

Only Programs already assigned to the person creating the permissions are available. If the desired Program is not available for selection, please contact the ACF Regional Grants Office, Central Office Lead, or app_support@acf.hhs.gov.

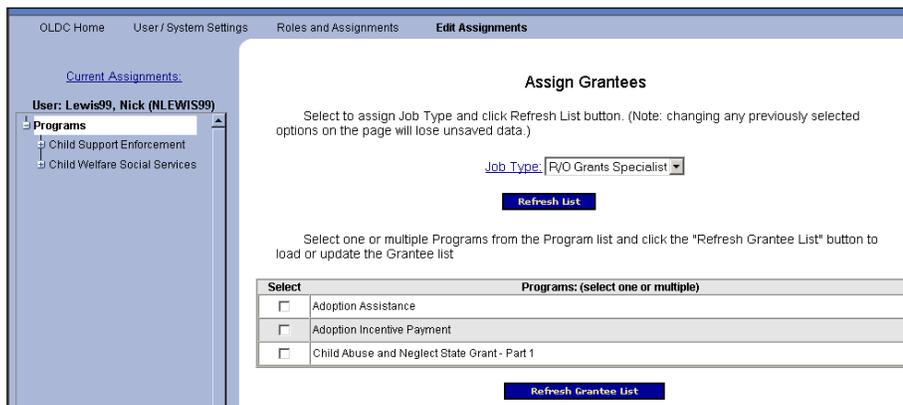
6. Select the **Primary Contact** checkbox next to the appropriate program if the user’s name should display under the Contacts section of the “Report Form Status” screen for a particular Program or if they should have the Certify capability.
7. Select the **Notify on Submit** checkbox next to the appropriate program if the user should receive e-mail notification when a report form is Submitted or Unsubmitted.



8. When assignments are complete, click the **Save** button if a checkbox was selected from the *All* column, or click **Next** if a checkbox was selected from the *Select* column.
9. If the **All** grantees checkbox was clicked in the Program list, the “Assign Programs” screen refreshes and the Job Type column in the Programs list is filled. New users (who do not already have access to Secure Sign-In) receive two e-mails, the first containing user ID information and the second with a temporary SSI password.

Grantee Level Assignments

10. If any **Select** grantees checkboxes were selected, the “Assign Grantees” screen displays.



11. In the Programs list, select one Program to add grantees. Click the **Refresh Grantees List** button.

Select to assign Job Type and click Refresh List button. (Note: changing any previously selected options on the page will lose unsaved data.)

Job Type:

Select one or multiple Programs from the Program list and click the "Refresh Grantee List" button to load or update the Grantee list

Select	Programs: (select one or multiple)
<input checked="" type="checkbox"/>	Adoption Assistance
<input type="checkbox"/>	Adoption Incentive Payment
<input type="checkbox"/>	Child Abuse and Neglect State Grant - Part 1

Make changes to the Grantee list and click "save" when selected changes include required or optional steps a new screen will load. Click "Reset" to restore to default settings.

Grants	Grantee(s):	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select	UnAssign	Filter by: All State Territory Tribe Other		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maine [1 016000001 A6]	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Massachusetts [1 046002284 K6]	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New Hampshire [1 026000618 B3]	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rhode Island [1 056000522 C6]	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vermont [1 036000274 A8]	<input type="checkbox"/>	<input type="checkbox"/>

12. All available grantees display in the Grantee list. The same options are available as from the Programs list. Click the **All** checkbox to the left of a program to assign by Region or grantee, or click the **Select** checkbox to assign by individual grants.
13. Once assignments are complete, click the **Save** button if an *All* checkbox was selected, or the **Next** button if a *Select* checkbox was selected.
14. If the **All** grants checkbox was clicked in the Grantee list, the “Assign Programs/Grantees” screen refreshes and the Job Type column in the Grantee list is filled. Select other Programs as necessary to make assignments.

Grant Level Assignments

15. If any **Select** grants checkboxes were clicked, the “Assign Grants” screen displays.

OLDC Home User / System Settings Roles and Assignments **Edit Assignments**

Current Assignments:

User: Lewis99, Nick (NLEWIS99)

Programs

- Child Support Enforcement
- Child Welfare Social Services

Assign Grants

Program Name: Adoption Assistance

Select to assign Job Type and click Refresh List button. (Note: changing any previously selected options on the page will lose unsaved data.)

Job Type:

Select a Grantee from the Grantee list and click the "Refresh Grant List" button to load or update the Grant list

Select	Grantees: (select one)
	Filter by: All State Territory Tribe Other
<input checked="" type="checkbox"/>	Vermont [1 036000274 A8]

16. Select one Grantee by clicking the checkbox and then clicking the **Refresh Grant List** button.

17. Select one or multiple grants, and click the **Save** button.

18. The “Assign Grants” screen refreshes and the Job Type column in the Grant list is filled.

Report Access

It is possible to assign or unassign specific report forms to a user. For example, a user may be assigned the CSE 157 Program Performance Report form for a grant while another user is responsible for completing the CSE 34A and 396A.

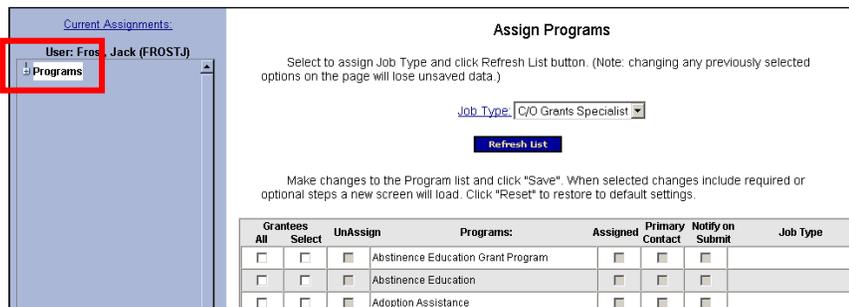
It is not necessary to modify report access if a user should be assigned all reports for a program.

TIPS

By default, users are automatically assigned to all available reports (availability of reports depends on reports already assigned to the OLDC Lead) when assigned to a Program.

To assign or unassign specific reports, follow these steps:

1. From the “Roles and Assignments” screen, select an account to modify and click **Edit Assignments**.
2. The “Assign Programs” screen displays. From the left side bar, click **Programs**.



3. Select the desired program from the side navigation.

At this point, one of two screens displays depending on the level of assignments:

- The “Customize Report for Program Level assignments” screen for Program Level assignments
- The “Assign Grantees” screen for Grantee and Grant Level assignments

Turn to the appropriate section for assigning Report Specific permissions.

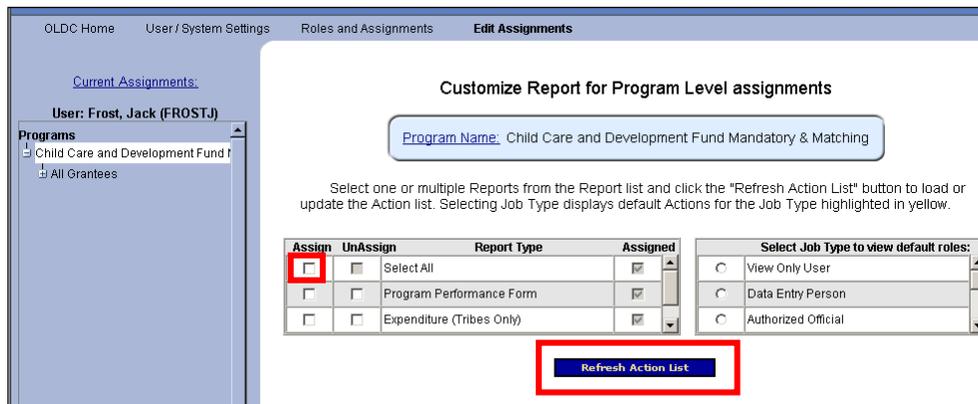
Program Level Assignments

The “Customize Report for Program Level assignments” screen displays if a user is assigned to all available grantees for a Program.

- a. The “Customize Report for Program Level assignments” screen displays.
- b. Assign or Unassign desired reports by clicking the appropriate checkboxes.
- c. Select a Job Type from the list and then click the **Refresh Action List** button.

TIPS

Please note that selecting a Job Type at this point does not change the job Type assignment, but instead highlights the default roles associated with the Job Type in the Action List.



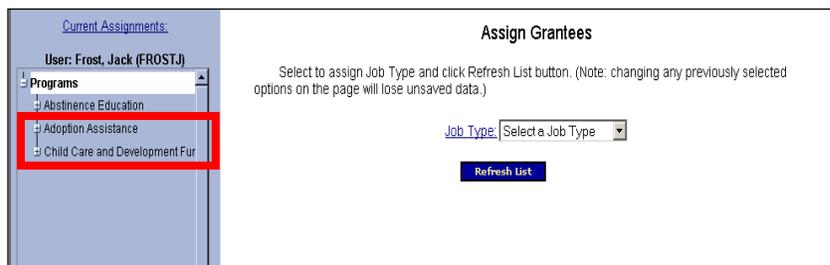
- d. The “Action List” list displays below the Report list. If no further changes to permissions are necessary, click **Save** and then End OLDC.

If roles should be changed according to report type, turn to the section [Action List](#) on page 17.

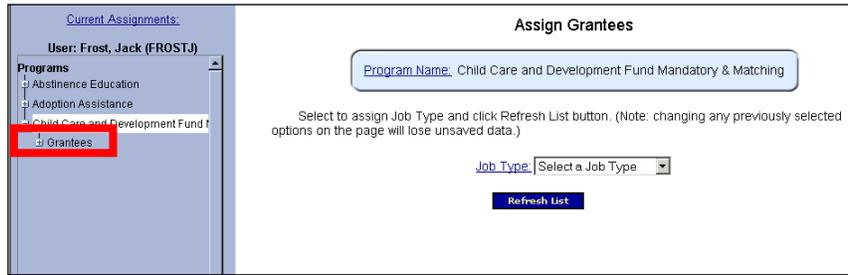
Grantee Level Assignments

The “Assign Grantees” screen displays if a user is assigned to a sub-set of grantees for a Program (i.e. a region, state, tribe, territory, or organization).

- a. The “Assign Grantees” screen displays. Click the desired **Program** from the left side bar navigation tree.



b. The “Assign Grantees” screen displays. From the navigation tree, click **Grantees**.



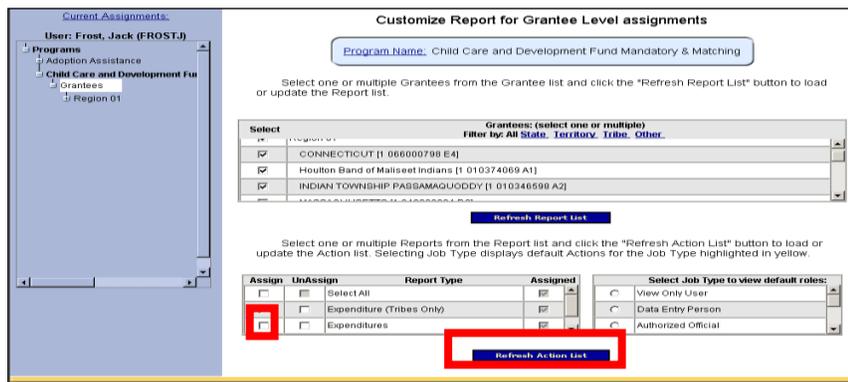
c. The “Customize Report for Grantee Level assignments” screen displays. Select one or multiple (can select an entire region) grantees and click the **Refresh Report List** button.



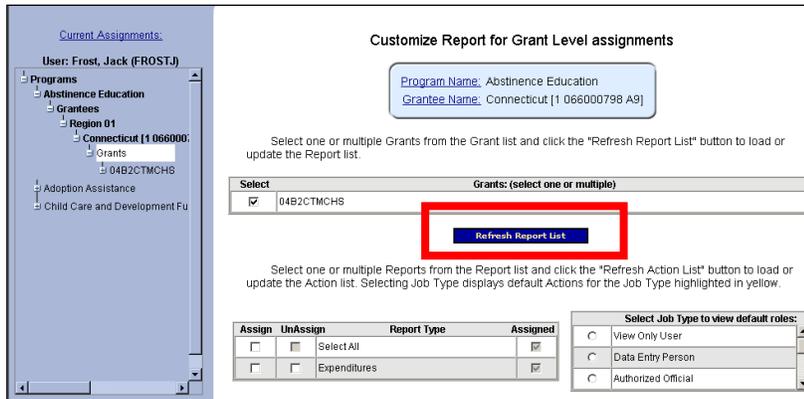
d. All available reports display below the grantee list. Assign or Unassign desired reports.

e. Select a Job Type from the list and then click the **Refresh Action List** button.

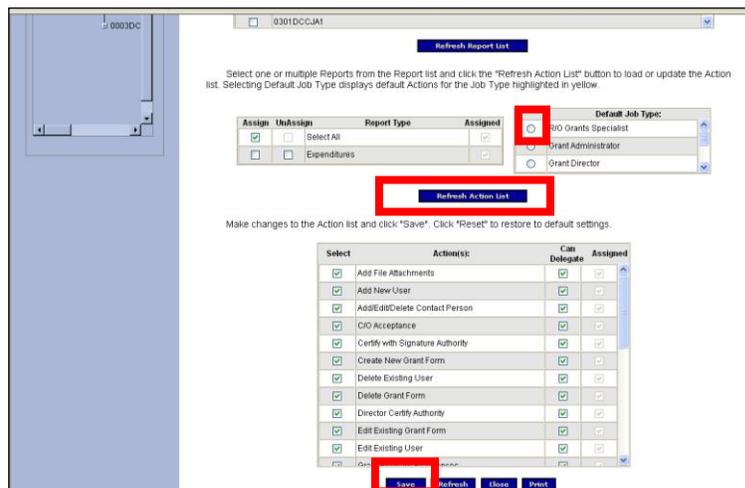
TIPS
Please note that selecting a Job Type at this point does not change the job Type assignment, but instead highlights the default roles associated with the Job Type in the Action List.



f. The “Action List” list displays below the Report list. If no further changes to permissions are necessary, click **Save** and then End OLDC.



- d. All available reports display below the Grant list. Assign or Unassign desired reports.
- e. Select a Job Type from the “Default Job Type” list and then click the **Refresh Action List** button.



TIPS
Please note that selecting a Job Type at this point does not change the job Type assignment, but instead highlights the default roles associated with the Job Type in the Action List.

- f. The “Action List” list displays below the Report list. If no further changes to permissions are necessary, click **Save** and End OLDC.

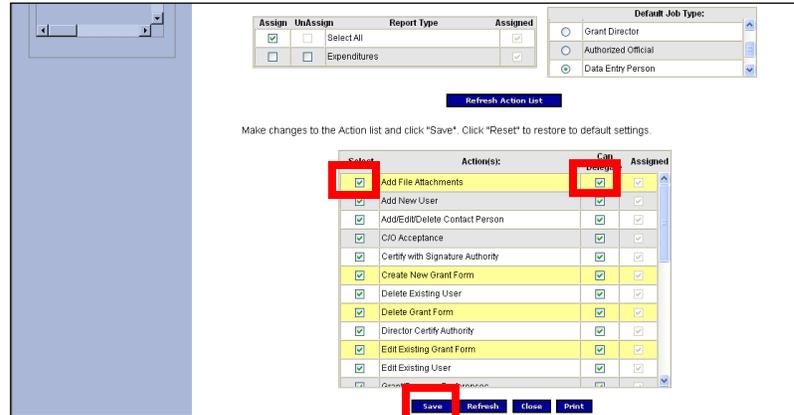
If roles should be changed according to report type, continue with the section [Action List](#) on page 17.

Action List

The Action list is used to add or remove individual roles. Roles are report specific and may be assigned either by Program, Grantee, or by Grant.

To provide additional *Roles*:

1. Complete the steps in the section “Report Access” (Program Level, Grantee Level, or Grant Level). The “Action List” displays.



2. Check or uncheck roles to assign from the **Select** checkbox. If the user should have the ability to grant roles to other users, also click the **Can Delegate** checkboxes.
3. Click the **Save** button. Once the screen re-appears, the changes are complete.

Copy Assignments

When creating a new user, it is possible to copy the assignments of an existing user to the new user. Copy Assignments may be used in place of Edit Assignments.

TIPS

If a user with existing permissions is selected to have assignments copied to them, the new permissions overwrite the existing ones.

To copy assignments from one user to another, follow these steps:

1. From the “Roles and Assignments” screen, select a user to receive roles and click the **Copy Assignments** button.

Roles and Assignments

Current Users: Search or Select a name.

- Click "Edit Assignments" to assign job type, to increase or decrease the Programs, Grantees and/or Grants, to assign reports based on the type of report (i.e. Expenditure) and to increase or decrease the actions available for this user.
- Click "Delete User" to remove the user from the OLDC system permanently.
- Select a name and click "Copy Assignments" to copy assignments from another user to the selected user.

New Users: To create a new user, fill out the required fields indicated by an asterisk *. First Name, Last Name, Email Address and User Type.

- To add a new user from the grant contacts list, click "Person Search". From the following screen, select a name. This name will be added inserted into the "Add New User" fields. Click "Add User" to complete this process.

Edit Current User

Search:

Current Users: T2,111 (1121)

- AddUser Test_Senthil (SADDUSERTEST)
- Adm1_Gatesoldc (GATESOLDCADM1)
- Adm1_Oldc (OLDCADM1)
- Adm2_Gatesoldc (GATESOLDCADM2)
- Adm2_Oldc (OLDCADM2)
- Adm3_Oldc (OLDCADM3)
- Adm4_Oldc (OLDCADM4)
- Adm5_Oldc (OLDCADM5)
- Adm6_Oldc (OLDCADM6)
- aku_wak (UAKU)
- Anderson, John (JANDERSON)
- asadad_adads (ASDAD)
- A_Official_Deads (A_OFFICIAL)
- Black_Andy (BLACK)
- Burtshev, Oleg (OBURTSEV)

Buttons: Edit Assignments, Copy Assignments, Delete User

Add New User

Name: First: Middle: Last:

Title:

Address: Number: Street Name: Type: Street Type:

Other:

City: State: Zip:

Email:

Telephone: Ext:

User Type:

Buttons: Add User, Person Search

HHS | ACF
OLDC Version 3.0 - 8

2. The “Copy Assignments” screen displays. Choose a user from the Current Users list to copy their assignments to the person selected on the previous screen.

Copy Assignments

User Name: Miller, Arthur C. (AMILLER1)

Email: arthur.miller@acf.hhs.gov

Choose the user below to copy their assignments to the person selected on the previous screen.

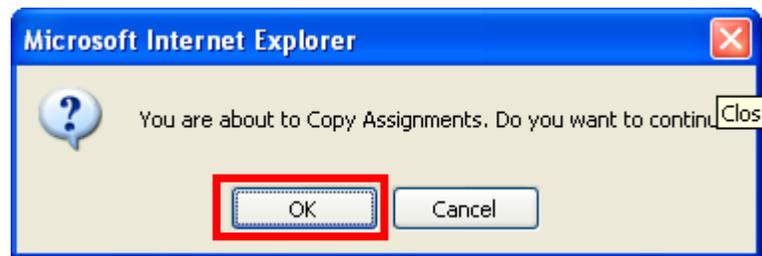
Current Users:

- Frederick, Gary W. (FREDERICK)
- Gonzalez, Winston (WGONZALEZ)
- G_Admin_Dads (G_ADMIN)
- G_Director_Dads (G_DIRECTOR)
- G_View_Dads (G_VIEW)
- Hasz93, Paul E. (HASZ99)
- Huey, Baby (BHUEY)

Buttons: Copy Assignments

HHS | ACF

3. Click the **Copy Assignments** button.
4. The message “You are about to Copy Assignments. Do you want to continue?” appears. Click **OK**.



5. The message “The Assignments for the User have been copied between selected users” appears. Click **OK**. At this point, new users are e-mailed their SSI IDs and passwords.



6. Click the **Roles and Assignments** link from the top of the screen to return to the “Roles and Assignments” screen.

Delete User

In OLDC, it is possible to delete a person’s access to the system. Although the account is deleted, their record remains in the database and information about that user can be retrieved upon request. This is necessary since actions performed by that user are tracked for historical purposes.

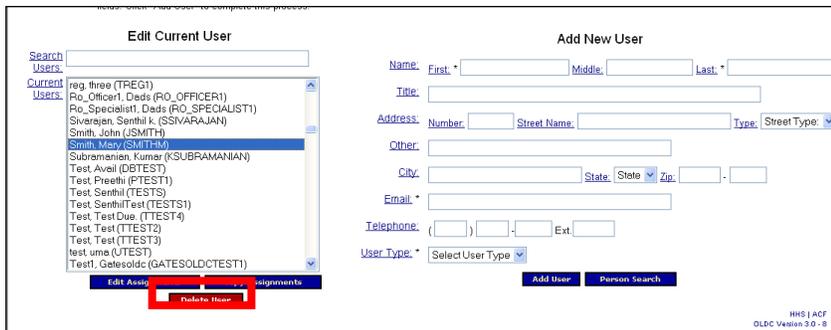
If a staff member permanently leaves the organization or a job, delete them from OLDC. If a staff member takes extended leave, do not delete them from OLDC but remove their assigned Programs.

TIPS

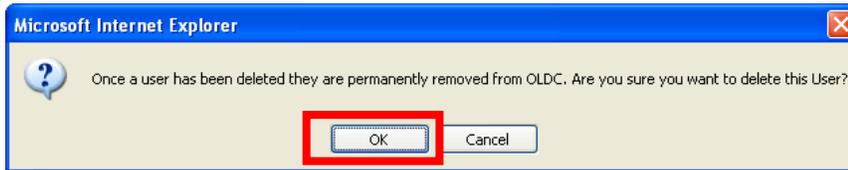
When a user’s assignments are removed, their name still displays in the “Edit Current User” list. The name only disappears once the user is deleted.

To delete a user from OLDC, follow these steps:

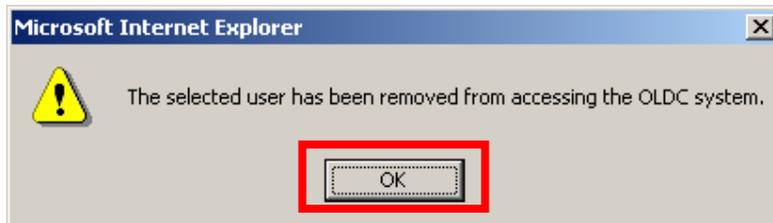
1. From the “Roles and Assignments” screen, select the user to delete from *Edit Current User*. Click the **Delete User** button.



2. The message “Once a user has been deleted they are permanently removed from OLDC. Are you sure you want to delete this User?” appears. Click **OK**.



3. A confirmation message appears stating the selected user has been removed from accessing the OLDC system. Click **OK**.



Password Administration

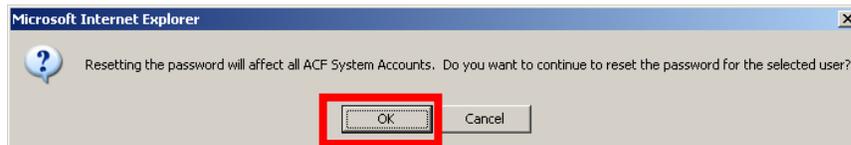
The Password Administration section gives users with the “Password Administration” role the capability to reset their staff’s passwords.

To reset a password, follow these instructions:

1. From OLDC Home, click the link **User/System Settings**
2. Under the heading “System Settings”, click the link **Password Administration**. The “Password Administration” screen displays.



3. From the “Current Users” box, click the name of the person who needs their password reset.
4. Click the **Password Reset** button.
5. The “Resetting the password will affect all ACF System Accounts. Do you want to reset the password for the selected user” message appears. Click **OK**.



6. The “Password has been successfully reset for the selected user and an e-mail has been sent to that user” message appears. Click **OK**.



The user now receives two e-mails: one advising the password was reset and the other containing the new password. The person who reset the password also receives e-mail confirmation.

Need Help?

Grant Partners should contact their Grants Office for assistance.

Federal staff should contact their OLDC Central Office Lead for assistance – or contact the Custom Application Support and Training help desk by phone at 1-866-577-0771 or via e-mail at app_support@acf.hhs.gov.

OLDC Help FAQ Site

From any OLDC screen, click the link Help/FAQ.

Existing answers to questions can be found in OLDC's Help/FAQ searchable database section **Find Answers**.

To submit a question to OLDC Technical staff, use the OLDC Help/FAQ – **Ask a Question** section.

NOTES:

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Appendix A: Job Types and Roles

List of Job Types

Federal Staff	Grant Partners
<p>C/O Grants Officer - All grant information from the Central Office Grants Specialists is reviewed by a Central Office Grants Officer. Central Office Grants Officers have the authority to review and approve the grant information of a specific program.</p>	<p>Grant Administrator - Person responsible for creating User IDs and assigning roles to Grantee staff. A Grant Administrator can create User IDs and assign roles to staff members working with a specific program or grant.</p>
<p>C/O Specialist - Receives Recommendations from the Regional Grants Officers and prepares the grant for the Central Office Grants Officer.</p>	<p>Data Entry Person - Person responsible for entering grant report data into OLDC. The Data Entry Person is able to create and edit grant reports by default. Additional roles may be given, including Certify, Submit, and Unsubmit.</p>
<p>R/O Grants Officer - The authority to review and approve the grant information of a specific grantee within a particular region.</p>	<p>Authorized Official – Person directly involved in the processing of the grant. This might be a Financial Officer (FO) in charge of budgeting the grant, or a member of an audit team. An Authorized Official has view-only and Certify roles by default. Additional roles such as Submit may be assigned to the Authorized Official.</p>
<p>R/O Specialist - The authority responsible for processing the grant information of a specific grantee within a particular region.</p>	<p>Grant Director - Manager of the grant recipient. The default roles are View-only and Certify. The Grant Director may be given other available permissions if more direct control over grants is required.</p>
<p>Auditor – Read and print report forms, but cannot perform any action such as data entry.</p>	<p>View-Only – Read and print report forms, but cannot perform any action such as data entry.</p>

List of Roles

Role	Assignment
Add File Attachments	Adds attachments to a report for submission.
Add New User	Creates new users within the organization to have access to the OLDC system. It also defines the job type and delegate roles.
Add/Edit/Delete Address	Allows access to the <i>Address</i> section of the OLDC application. Users can add new addresses, edit existing addresses, or delete addresses that no longer pertain to the program or grant.
Add/Edit/Delete Contact Person	Allows access to the <i>Contact Person</i> section of the OLDC application. Users can add new contacts, edit existing contacts, or delete contacts that no longer pertain to the program or grant.
Certify with Signature Authority	Officially signs a form for submission. This does not submit the report form to ACF. Report forms must be certified prior to submission. Users with both Certify and Submit roles must certify a report form before submitting it.
Director Certify Authority	Performs the same function as Certify with Signature Authority. This role must be assigned to at least one of the certifying officials for forms that require two signatures.
Create New Grant Form	Creates a new form or report for a specific time period pertaining to the requirements of the grant.
C/O Acceptance Review	Enables the Central Office user to “Review” a grantee submitted report prior to C/O Acceptance and change the status of the report to “In Review”.
C/O Acceptance	Enables the Central Officer to officially “Accept” a grantee submitted report as the legal document.
Delete Existing User	Delete users within the organization that have access to the OLDC system. Any defined job types and delegations of roles to that user are also deleted.
Delete Grant Form	Deletes a form, report, or revision after it has been created. Reports of Submitted status or higher cannot be deleted. This role also removes all previously entered data and any reference to the particular file or report.
Edit Existing Grant Form	Allows editing of any report, including revisions. Reports of Submitted status or higher cannot be edited.
Edit Existing User	Edits the roles, job types, and delegated roles of the users within the organization that have access to the OLDC system.
Export Files from OLDC	For advanced users. Allows downloading of any past or present reports from OLDC in different formats. This role is similar to the Read Only role and will not affect any reports or data in the OLDC application.

Role	Assignment
Grant/Program Preferences	Allows Grant and Program level changes to how the OLDC application process works at the user’s level. This area contains options that affect the submission of a specific report, such as requiring more than one signature or approval prior to submission.
Grant/Program Settings & Limits	Defines grant-related settings that affect only grants with which the user is associated, such as number of signatures required.
Help/FAQs	Allows access to the features and functions of the OLDC Help program and Frequently Asked Questions (FAQ) database. Recommended for all users.
Import Files to OLDC	For advanced users. Allows copying of files or reports from a local computer to the OLDC system. This process is similar to the Data Entry role but allows users to copy multiple reports at one time.
Management Status/Remarks	Enables the Report Status History and Remarks section of the Report Form Status page.
Remove Address From Database	Permanently deletes addresses that no longer pertain to the program or grant. This removes the address from OLDC.
Reports & Queries	Creates and runs summary reports based upon the information previously reported in OLDC.
Revise Submitted Grant Form	Creates a revision of a form or report for a specific time period related to the requirements of the grant. In some cases, this feature is only available upon approval from the ACF Grant or Program Office.
R/O Acceptance Review	Enables the Regional Office user to “Review” a grantee submitted report prior to R/O Acceptance and change the status of the report to “In Review”.
R/O Acceptance	Enables the Regional Officer to officially “Accept” a grantee submitted report as the legal document.
Search Contact Person	Allows access to the search function within the contact person section of the OLDC application. Users can search or browse other users listed, and choose to add them to the contacts list for the program or grant.
Submit Grant Form	Officially submits a report form for ACF approval. This role does not certify the report. A report must be certified prior to submission. Users with both Certify and Submit roles must still Certify a form before it can be submitted.
Submission Override	Allows Federal staff to submit a report form after the due date has passed. This is a restricted role.
Un-submit Grant Form	Unsubmits a report in two cases. The first case is after submission of a form but before the ACF Grants or Program Offices reviews it. The second case is upon notification from ACF Grants or Program Offices that form changes are necessary.

Role	Assignment
View Contact Person	Allows access to the contact person section of the OLDC application. Users can browse and view contacts that pertain to a user's program or grant.
View Grant Settings	View-only role. Allows access to a listing of important grant related dates including deadlines, due dates, and extensions applicable to a user's program or grant.
View Official Grantee Address	View-only role. Allows access to the address section of the OLDC application. Users can browse and view addresses that pertain to their program or grant.
View Personal Roles	View-only role. Reviews the roles and responsibilities assigned to the user. These also define the application capabilities and functions available to the user.
View/Print Grant Form	View-only role. Allows the user to view or print any and all reports, including revisions. Reports of any status can be viewed as well.
View Status/History	Permits the user to see the History and to enter public remarks in the Remarks section of the Report Form Status page.

Helpful Hints and Troubleshooting

- **Edit Assignments Breadcrumb (Navigation Link):** Clicking the **Edit Assignments** breadcrumb returns the user to the “Assign Programs” screen (same as clicking Programs from the Navigation Tree).
- **Modifying existing Permissions:** When modifying existing permissions such as Notify on Submit or Primary Contact, make sure the correct Job Type is selected at the top of the screen.