



Linking Services, Solutions, Communities

Online Data Collection (OLDC) System Creating and Modifying Grantee Accounts

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Public Class

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Agenda

- Lesson 1: Introduction
- Lesson 2: Add New User
- Lesson 3: Edit Assignments
- Lesson 4: Copy Assignments
- Lesson 5: Password Administration
- Lesson 6: Delete User
- Resources
- Questions and Answers

LESSON 1: INTRODUCTION

Introduction

- Persons with appropriate roles can create new OLDC accounts or modify existing ones
- Each account must have at least one Job Type, Program, and Grantee Organization assigned
- Use either the “Edit Assignments” section **or** the “Copy Assignments” section to grant permissions

Introduction

- “Edit Assignments” allows Federal Staff to give a Job Type to a new user
- “Copy Assignments” provides the capability to copy all permissions from an existing user to a new user

LESSON 2: ADD NEW USER

Add New User

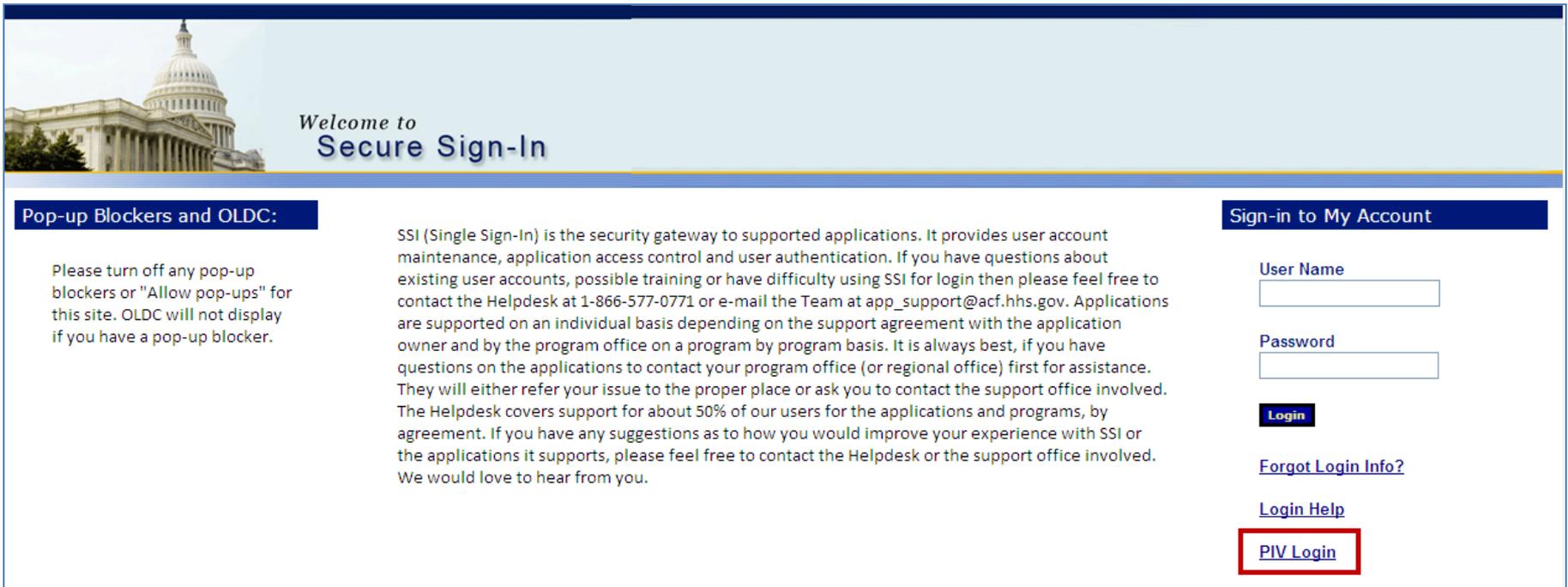
- Enter the secure web address in the browser Address line (Internet Explorer recommended)

<https://extranet.acf.hhs.gov/ssi/>

- Save the web address as a Favorite for quick access

Add New User

- The Secure Sign-In Login screen displays
- Click **PIV Login** and enter credentials



Pop-up Blockers and OLDC:

Please turn off any pop-up blockers or "Allow pop-ups" for this site. OLDC will not display if you have a pop-up blocker.

Sign-in to My Account

User Name

Password

Login

[Forgot Login Info?](#)

[Login Help](#)

PIV Login

SSI (Single Sign-In) is the security gateway to supported applications. It provides user account maintenance, application access control and user authentication. If you have questions about existing user accounts, possible training or have difficulty using SSI for login then please feel free to contact the Helpdesk at 1-866-577-0771 or e-mail the Team at app_support@acf.hhs.gov. Applications are supported on an individual basis depending on the support agreement with the application owner and by the program office on a program by program basis. It is always best, if you have questions on the applications to contact your program office (or regional office) first for assistance. They will either refer your issue to the proper place or ask you to contact the support office involved. The Helpdesk covers support for about 50% of our users for the applications and programs, by agreement. If you have any suggestions as to how you would improve your experience with SSI or the applications it supports, please feel free to contact the Helpdesk or the support office involved. We would love to hear from you.

Add New User

- From the Secure Sign-In main screen, click the **OLDC** button

United States Department of Health & Human Services

Current User: walters99
Current Environment: Training
Last Login: 10/30/07 11:12:25 AM

[Personal Information](#)
[Change Password](#)
[Change Challenge Question](#)
[Log Off](#)
[Privacy](#)
[Accessibility](#)
[Help / FAQ](#)

Please choose Application then press the Application Button.
System alerts and announcements are displayed below the Application Launch table.

Select Application
OLDC

Alerts & Announcements

[HHS Home](#) | [Questions?](#) | [Contact HHS](#) | [Site Map](#) | [Accessibility](#) | [Privacy Policy](#) | [Freedom of Information Act](#) | [Disclaimers](#)

[The White House](#) | [FirstGov](#)

Current Version: Version 1.1.2.1.1

If OLDC does not open, you may have a pop-up blocker on your computer. Hold down the *Control* button from your keyboard and then click the *OLDC* button. Continue holding *Control* until OLDC opens

Add New User

- Begin making assignments by selecting the **User/System Settings** link

On-Line Data Collection

Name: Anna-Lisa Walters
Last Login: 08/14/07 10:25:25 AM

[Help / FAQ](#)
[End OLDC](#)

OLDC Home

[Report Form Entry](#)

[Analytical Reports](#)

[User / System Settings](#)

[End OLDC](#)

[Privacy](#)

[Accessibility](#)

[Help / FAQ](#)

[News & Tips](#)

On-Line Data Collection

Welcome! If this is your first time, please feel free to make use of our training resources. For any questions visit our dynamic database of questions and answers. Many functions throughout this application, contain links that provide context-sensitive help.

HHS | ACF
OLDC Version 3.0
08/02/2007

Add New User

- Click **Assignment Delegation**

OLDC Home User / System Settings

User Settings

[User Preferences](#) personal settings - report form navigation.

[View Assignments](#) Review roles and responsibilities.

[View Grant Settings](#) Review grant related dates including deadlines, due dates, and extensions.

System Settings

[Assignment Delegation](#) Assign job types and delegate roles to users.

[Password Administration](#) Reset passwords for users.

[Web Accessibility](#) | [Privacy and Security Notice](#) | [Freedom of Information Act](#) | [Disclaimers](#)

OLDC

Add New User

- The “Roles and Assignments” screen displays
- Before adding a new user, search for their name in the *Edit Current User* list to prevent duplicate accounts

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 Users:](#)

- Acyf1, Training (ACYF1)
- Acyf10, Training (ACYF10)
- Acyf11, Training (ACYF11)
- Acyf12, Training (ACYF12)
- Acyf13, Training (ACYF13)
- Acyf14, Training (ACYF14)
- Acyf15, Training (ACYF15)
- Acyf2, Training (ACYF2)
- Acyf3, Training (ACYF3)
- Acyf4, Training (ACYF4)
- Acyf5, Training (ACYF5)
- Acyf6, Training (ACYF6)
- Acyf7, Training (ACYF7)
- Acyf8, Training (ACYF8)
- Acyf9, Training (ACYF9)
- Anaya, Arianta (AANAYA99)

[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:](#) *

[Add User](#) [Person Search](#) [Create/Assign Requested Accounts](#)

Add New User

- If no account exists, add the new user
 - In the *Add New User* section, enter the new user's complete information, including First Name, Last Name, and Email address
 - Title is recommended if the person is a Certifier
 - From the User Type drop-down menu, select **Non-Federal** for grantee accounts

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 "Person Search" to complete this process.

Edit Current User

Search Users:

Current Users:

- Acyf1, Training (ACYF1)
- Acyf10, Training (ACYF10)
- Acyf11, Training (ACYF11)
- Acyf12, Training (ACYF12)
- Acyf13, Training (ACYF13)
- Acyf14, Training (ACYF14)
- Acyf15, Training (ACYF15)
- Acyf2, Training (ACYF2)
- Acyf3, Training (ACYF3)
- Acyf4, Training (ACYF4)
- Acyf5, Training (ACYF5)
- Acyf6, Training (ACYF6)
- Acyf7, Training (ACYF7)
- Acyf8, Training (ACYF8)
- Acyf9, Training (ACYF9)
- Anaya, Arianta (AANAYA99)

Add New User

Name: First: * Middle: Last: *

Title:

Address: Number: Street Name: Type:

Other:

City: **State:** **Zip:** -

Email: *

Telephone: () - Ext.

User Type: *

- Select User Type
- Non-Federal**
- Contractor
- Federal

Add New User

- Click the **Add User** button
- A warning message displays. Click the **OK** button
- The “A new user has been added. The user is selected in the Current User List.” message displays. Click **OK**
 - **Note:** The user does not yet receive their account information



Add New User

- The new user's name and ID are selected in the *Edit Current User* list

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 to complete this process.

Edit Current User

[Search Users:](#)

[Current Users:](#)

- Prince, Diana (PRINCED)
- Prince, Fiona (PRINCEP)
- Randall99, Shervonne (SRANDALL99)
- Rangasamy99, Siva (RANGASAMY99)
- Region101, Training (REGION101)
- Region102, Training (REGION102)
- Region103, Training (REGION103)
- Region104, Training (REGION104)
- Region105, Training (REGION105)
- Region106, Training (REGION106)
- Region107, Training (REGION107)
- Region108, Training (REGION108)
- Region109, Training (REGION109)
- Region110, Training (REGION110)
- Region201, Training (REGION201)
- Region202, Training (REGION202)

Edit AssignmentsCopy 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: *

Add UserPerson SearchCreate/Assign Requested Accounts

Add New User

- Once a new user is added to the system, the next step is to assign a **Job Type, Program, Grantee Organization**, and in some cases, the **Grant Number**
 - You may only assign the Programs, Job Type, and Grantee Organizations that you are assigned
- A **Job Type** is an OLDC title that contains a group of permissions called Roles

Add New User

- There are Five grantee Job Types in OLDC
 - **Grant Administrator** - Person responsible for creating User IDs and assigning roles to Grantee staff. A Grant Administrator is assigned all grantee roles in OLDC.
 - **Data Entry** - 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
 - **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
 - **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
 - **View-Only** - Read and print report forms, but cannot perform any action such as data entry

LESSON 3 – EDIT ASSIGNMENTS

Edit Assignments

- Ensure the new user is highlighted in the *Edit Current User* list
- Click the **Edit Assignments** button

Edit Current User

[Search](#)

[Users:](#)

[Current](#) **Prince, Diana (PRINCED)**

[Users:](#) Prince, Fiona (PRINCEF)
Randall99, Shervonne (SRANDALL99)
Rangasamy99, Siva (RANGASAMY99)
Region101, Training (REGION101)
Region102, Training (REGION102)
Region103, Training (REGION103)
Region104, Training (REGION104)
Region105, Training (REGION105)
Region106, Training (REGION106)
Region107, Training (REGION107)
Region108, Training (REGION108)
Region109, Training (REGION109)
Region110, Training (REGION110)
Region201, Training (REGION201)
Region202, Training (REGION202)

[Name:](#) First: *

[Title:](#)

[Address:](#) Number:

[Other:](#)

[City:](#)

[Email:](#) *

[Telephone:](#) ()

[User Type:](#) *

Edit Assignments **Copy Assignments** **Add User**

Delete User

Edit Assignments

- The “Edit Assignments” 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 Grant Administrator to navigate permissions directly from the side bar
- Select a **Job Type** from the *Job Type* drop-down list

OLDC Home User / System Settings Roles and Assignments Edit Assignments

[Current Assignments](#)

User: Prince, Diana (PRINCED)

Assignment Tree Area

Assign Programs

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

Job Type:

- Select a Job Type
- Auditor
- View Only User
- Data Entry Person**
- Authorized Official
- Grant Director
- Grant Administrator
- R/O Grants Specialist
- R/O Grants Officer
- C/O Grants Specialist
- C/O Grants Officer

Load

Edit Assignments

- Click the **Load/Refresh List** button

The screenshot displays a web application interface for editing assignments. At the top, a navigation bar includes links for 'OLDC Home', 'User / System Settings', 'Roles and Assignments', and 'Edit Assignments'. On the left side, there is a sidebar with a link for 'Current Assignments:' and the text 'User: Prince, Diana (PRINCED)'. The main content area is titled 'Assign Programs' and contains the instruction: 'Select to assign Job Type and click Load/Refresh List button. (Note: changing any previously selected options on the page will refresh the data.)'. Below this instruction, there is a 'Job Type:' label followed by a dropdown menu currently set to 'Data Entry Person'. A red rectangular box highlights the 'Load/Refresh List' button, which is a dark blue button with white text.

Edit Assignments

- All available programs display below the previously selected Job Type
- Click one or more **Select** checkboxes under the Grantees column and click the **Next** button

Assign Programs

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

Job Type: Data Entry Person

Load/Refresh List

- Assign for Program: Check "All" for program(s) and Press "Save". Results in user having default roles for selected job type for all reports the assignee is associated with.
- Assign for Grantee or Grant: Check "Select" for program(s) and Press "Next". Screen will change to the grantee assignment screen.

Grantees			Programs:	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select	UnAssign					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Care Development Fund Discretionary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHILD CARE RESEARCH PARTNERSHIPS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Development Associate Scholarship Assistance (Inactive)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Health Practitioner Support Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Neurology Society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Child Support Enforcement - States	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Child Support Enforcement - Tribes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHILD SUPPORT ENFORCEMENT DEMONSTRATIONS AND SPECIAL PROJECTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHILD WELFARE RESEARCH AND DEMONSTRATIONS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHILD WELFARE SERVICES TRAINING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child Welfare Social Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Children & Youth Projects (CYP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Children's Justice Act	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Reset **Next**

Edit Assignments

- The “Assign Grantees” screen displays. Select one or more checkboxes next to desired programs and click the **Load/Refresh Grantee List** button

Settings Roles and Assignments Edit Assignments

Assign Grantees

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

Job Type: Data Entry Person

Load/Refresh List

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

Select	Programs: (select one or multiple)
<input checked="" type="checkbox"/>	Adoption Assistance
<input checked="" type="checkbox"/>	Child Support Enforcement - States
<input checked="" type="checkbox"/>	Child Support Enforcement - Tribes
<input checked="" type="checkbox"/>	Foster Care

Load/Refresh Grantee List

- The screen refreshes and the grantee list displays. If no records appear in the grantee list, it may be necessary to deselect all but one program and click the **Load/Refresh Grantee List** button
 - A different set of grantees may be available to various programs

Assign Grantees

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

Job Type:

Load/Refresh List

Select one or multiple Programs from the Program list and click the "Load/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"/>	Child Support Enforcement - States
<input type="checkbox"/>	Child Support Enforcement - Tribes
<input type="checkbox"/>	Foster Care

Load/Refresh Grantee List

Edit Assignments

- The Grantee List displays. Under the Grants column, click the **All** checkbox next to the appropriate grantee
 - Assigns all grants associated with the selected organization

- Optional: Click the **Primary Contact** (name appears on the Report Form Status Page) and **Notify on Submit** (receives emails upon report submission) checkboxes if desired

- Click the **Save** button

Assign Grantees

Select to assign Job Type and click Load/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 "Load/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"/>	Child Support Enforcement - States
<input type="checkbox"/>	Child Support Enforcement - Tribes
<input type="checkbox"/>	Foster Care

- Assign for Grantee:** Check "All" for region(s) or grantee(s) and Press "Save". Results in user having default roles for selected job type for all reports the person has.
- Assign for Grant:** Check "Select" for region(s) or grantee(s) and Press "Next". Screen will change to the grant assignment screen.

Grants			Grantee(s):				Assigned	Primary Contact	Notify on Submit	Job Type
All	Select	UnAssign	Filter by: All	State	Territory	Tribe				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region 01							
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connecticut [1 06000798 F0]					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maine [1 23000001 40]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Massachusetts [1 340002284 K0]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New Hampshire [1 33000018 B0]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rhode Island [1 080000522 C0]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vermont [1 030000274 40]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region 02							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New Jersey [1 210000028 F0]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New York [1 360013200 00]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Puerto Rico [1 690433481 B0]							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region 03							

Edit Assignments

- The “Assign Grantees” screen refreshes and the Assignment Tree is populated
- The user is now emailed their automatically generated ID and Password
- The account creator is also emailed confirmation that the new user is established

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

[Current Assignments:](#)

User: Prince, Diana (PRINCED)

Programs
Adoption Assistance

Assign Grantees

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

Job Type: Data Entry Person

Load/Refresh List

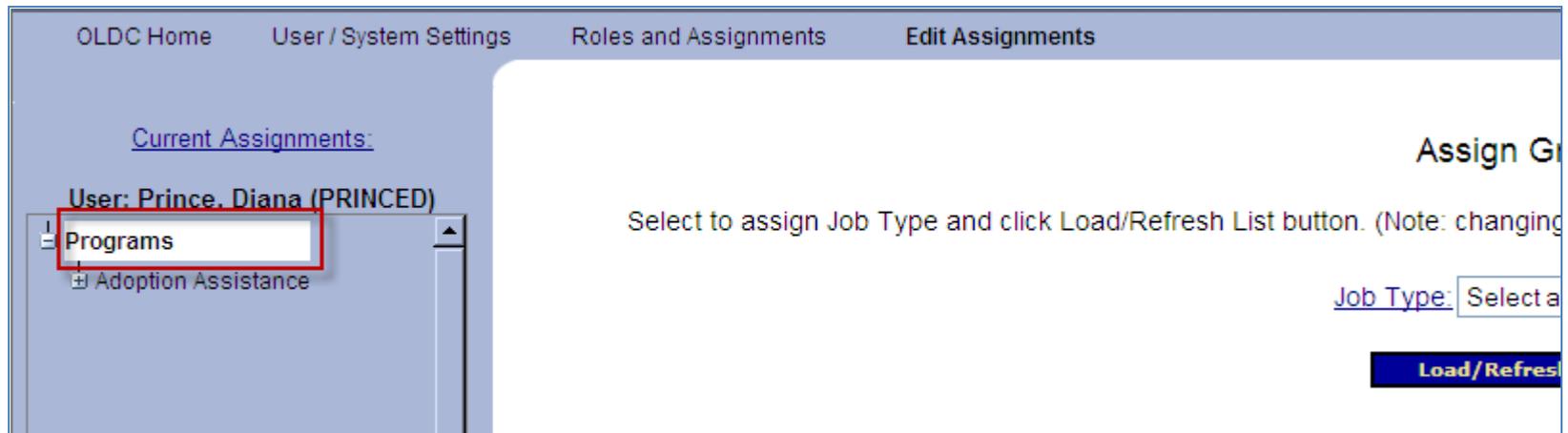
Select one or multiple Programs from the Program list and click the "Load/Refresh Grantee List" button to load or update the Grantee List.

Select	Programs: (select one or multiple)
<input checked="" type="checkbox"/>	Adoption Assistance
<input type="checkbox"/>	Child Support Enforcement - States
<input type="checkbox"/>	Child Support Enforcement - Tribes
<input type="checkbox"/>	Foster Care

Load/Refresh Grantee List

Edit Assignments

- To assign grant specific assignments, use the tree to return to the Programs list
 - Click **Programs**



Edit Assignments

- The *Assign Programs* screen displays
 - Select a Job Type and click the **Load/Refresh Grantee List** button

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

[Current Assignments:](#)

User: Prince, Diana (PRINCED)

- Programs
 - Adoption Assistance

Assign Grantees

Select to assign Job Type and click Load/Refresh List button. (Note: changing any previously selected options

Job Type:

Load/Refresh List

Edit Assignments

- The list of available programs displays
 - Select one or more programs from the *Select* column and click the **Next** button

Load/Refresh List

Instructions: Check "All" for program(s) and Press "Save". Results in user having default roles for selected job type for all reports the assigning user is responsible for.
or Grant: Check "Select" for program(s) and Press "Next". Screen will change to the grantee assignment screen.

Grantees			Programs:	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select	UnAssign					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Professional Partnership/CSHCN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Family Violence Prevention & Services State Grants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FAMILY VIOLENCE PREVENTION & SERVICES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Violence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family/Professional Partnership/ CSHCN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fetal Alcohol Spectrum Disorders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Field Experiences in Public Health Nursing in State and Local Health Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FIELD-INITIATED RESEARCH ON FAITH AND COMMUNITY BASED ORGANIZATIONS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FIP Verification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Flex Rural Veterans Health Access Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foster Care Voluntary (Title IV-E) Inactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foster Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Frontier Community Health Integration Demonstration Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save **Reset** **Next**

Edit Assignments

- The “Assign Grantees” screen displays
 - Select a program and click the **Load/Refresh Grantee List** button

Assign Grantees

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

Job Type:

Load/Refresh List

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

Select	Programs: (select one or multiple)
<input type="checkbox"/>	Adoption Assistance
<input checked="" type="checkbox"/>	Family Violence Prevention & Services State Grants

Load/Refresh Grantee List

Edit Assignments

- The available Grantees list displays. Click the checkbox from the *Select* column next to the desired grantee organization's name
 - Click the **Next** button

Select	Programs: (select one or multiple)
<input type="checkbox"/>	Adoption Assistance
<input checked="" type="checkbox"/>	Family Violence Prevention & Services State Grants

Load/Refresh Grantee List

- Assign for Grantee: Check "All" for region(s) or grantee(s) and Press "Save". Results in user having default roles for selected job type for all reports the assign
- Assign for Grant: Check "Select" for region(s) or grantee(s) and Press "Next". Screen will change to the grant assignment screen.

Grants			Grantee(s):	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select	UnAssign	Filter by: All <u>State</u> <u>Territory</u> <u>Tribe</u> <u>Other</u>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connecticut [1 00000790 A3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MA Wampanoag Tribe of Gay Head [1 042549130 A2]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAINE [1 00000001 F3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MASSACHUSETTS [1 040002284 A2]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ME Aroostook Band of Micmacs [1 010472707 A3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ME Houlton Band of Maliseet Indians [1 010274000 A1]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ME Pleasant Point Passamaquoddy Tribe [1 010336717 A1]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NEW HAMPSHIRE [1 020000100 B3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RHODE ISLAND [1 000000022 A3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RI Narragansett Indian Tribe [1 000402000 A2]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Previous
Save
Reset
Next

Edit Assignments

- The “Assign Grants” screen displays
 - Select a Grantee Organization to view its grants, and then click the **Load/Refresh Grant List** button

Assign Grants

Program Name: Family Violence Prevention & Services State Grants

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

Job Type: Data Entry Person

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

Select	Grantees: (select one)
<input type="checkbox"/>	Filter by: All State Territory Tribe Other
<input checked="" type="checkbox"/>	ME Aroostook Band of Micmacs [1010472707A1]

Edit Assignments

- The Program and Grant are now assigned
- Click **Program** from the assignment tree to view all active assignments

The screenshot shows a web application interface. On the left, there is a sidebar with a tree view under the heading "Current Assignments:". Below this heading, it says "User: Prince, Diana (PRINCED)". The tree view has a "Programs" folder selected, which is highlighted with a red box. Under "Programs", there are two sub-items: "Adoption Assistance" and "Family Violence Prevention & Ser".

The main content area is titled "Assign Grantees". It contains the following text: "Select to assign Job Type and click Load/Refresh List button. (Note: changing any previously selected of". Below this text, there is a "Job Type:" label followed by a dropdown menu showing "Auditor". Below the dropdown menu is a blue button labeled "Load/Refresh List".

Edit Assignments

- Additional permissions can be assigned to the user (such as Submit and Unsubmit)
 - Use the Sidebar Tree to navigate to the “Customize Report for Grantee Level Assignments” screen

Current Assignments:
User: Prince, Diana (PRINCED)

Customize Report for Grantee Level Assignments

Program Name: Adoption Assistance
Grantee Name: Connecticut [066000798 F0]

Select one or multiple Reports from the Report list and click the "Load/Refresh Action List" button to load or update the Action list. Selected displays default Actions for the Job Type highlighted in yellow.

Assign	UnAssign	Report Type	Assigned
<input type="checkbox"/>	<input type="checkbox"/>	Select All	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Budget Projections	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Demonstrations	<input checked="" type="checkbox"/>

Select Job Type to view default roles:

- Auditor
- View Only User
- Data Entry Person

Load/Refresh Action List

Edit Assignments

- All available reports display in the Report List box. Assign or Unassign desired reports or click the Select All checkbox to add additional permission to all assigned reports
- Select a Job Type from the “Default Job Type” list and then click the **Load/Refresh Action List** button
 - Selecting a Job Type at this point does not change the Job Type, but instead highlights the default roles associated with the Job Type in the Action List

Customize Report for Grantee Level Assignments

[Program Name:](#) Adoption Assistance
[Grantee Name:](#) Connecticut [1 066000798 F6]

Select one or multiple Reports from the Report list and click the "Load/Refresh Action List" button to load or update the Action list. Selecting displays default Actions for the Job Type highlighted in yellow.

Assign	UnAssign	Report Type	Assigned
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Select All	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Budget Projections	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Demonstrations	<input checked="" type="checkbox"/>

Select Job Type to view default roles:

<input type="radio"/>	Auditor
<input type="radio"/>	View Only User
<input checked="" type="radio"/>	Data Entry Person

Load/Refresh Action List

Edit Assignments

- The “Action List” displays. Click one or more Select boxes to assign or unassign roles
 - Click the **Can Delegate** checkboxes only in the user should have the ability to assign those roles to other users
- Click the **Save** button

Load/Refresh Action List

Make changes to the Action list and click "Save". Click "Reset" to restore to default settings.

Select	Action(s):	Can Delegate	Assigned
<input type="checkbox"/>	Revise Submitted Grant Form	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Search Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Submission Override	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Submit Grant Form	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Un-submit Grant Form	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Grant Settings	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Official Grantee Address	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	View Personal Roles	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	View Status/History	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	View/Print Grant Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save **Reset**

Edit Assignments

- If no additional changes are necessary, End OLDC
- Reports and Roles may be added or removed at anytime

LESSON 4: COPY ASSIGNMENTS

Copy Assignments

- It is possible to copy the assignments from an existing user to a new user. Copy Assignments may be used in place of Edit Assignments
 - If a user with existing permissions is selected to have assignments copied to them, the new permissions overwrite the existing ones

Copy Assignments

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

The screenshot displays two side-by-side panels. The left panel, titled 'Edit Current User', features a search bar and a list of users. The 'Copy Assignments' button is highlighted with a red box. The right panel, titled 'Add New User', contains various input fields for user details and two buttons at the bottom: 'Add User' and 'Person Search'.

Edit Current User

Search Users:

Current Users:

- Acharya-Train, Hari (HACHARYATRAIN1)
- Acyf1, Training (ACYF1)
- Admin, Grant (ADMINING)
- Alexander-Train, Abigail (AALEXANDERTRAIN)
- Amara-Train, Roel (RAMARATRAIN)
- Behr-Train, Jeanne (JBEHRTRAIN)
- Berthold-Train, Megan (MBERTHOLDTRAIN)
- Berthrong-Train, Bill (BBERTHRONGTRAIN)
- Bieg-Train, Scott (SBIEGTRAIN)
- Bullock-Train, Allyce (ABULLOCKTRAIN)
- Cason99, Tymel (TCASON99)
- Christie, Amy (CHRISTIEA)
- Clements, Jaye Neice (CLEMENTSJ)
- Coakley2, Brooke (BRCOAKLEY2)
- Congdon-Train, Tonya (TCONGDONTRAIN)
- Delete, Train (DELETE1)

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.

Add User **Person Search**

Copy Assignments

- 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
- Click the **Copy Assignments** button

System Settings Roles and Assignments **Copy Assignments**

Copy Assignments

User Name: Delete, Train (DELETET)
Email: annalisa.walters@acf.hhs.gov

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

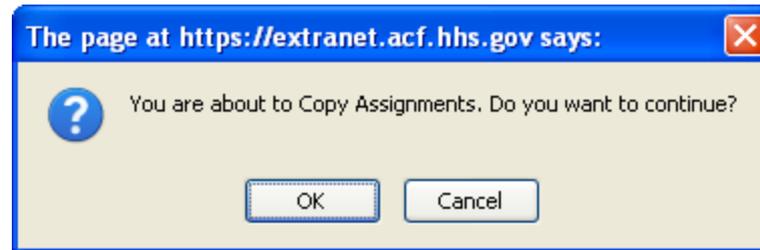
Current Users:

- Thompson, Jo (THOMPSONJ)
- Tijerina, Catherine (TIJERINAC)
- Tommet-Train, Pat (PTOMMETTRAIN)
- Torres-Train, Donald (DTORRESTRAIN)
- Trainee100, Training (TRAINEE100)**
- Trainee25, Training (TRAINEE25)
- Trainee26, Training (TRAINEE26)
- Trainee27, Training (TRAINEE27)
- Trainee28, Training (TRAINEE28)

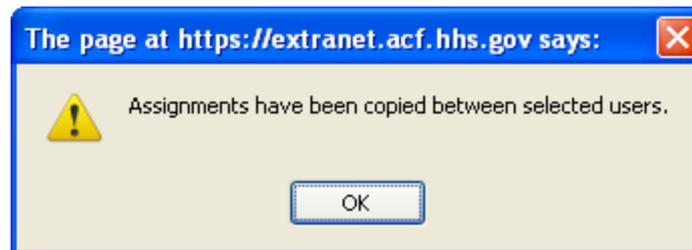
Copy Assignments

Copy Assignments

- A warning message appears to ensure you want to continue. Click **OK**



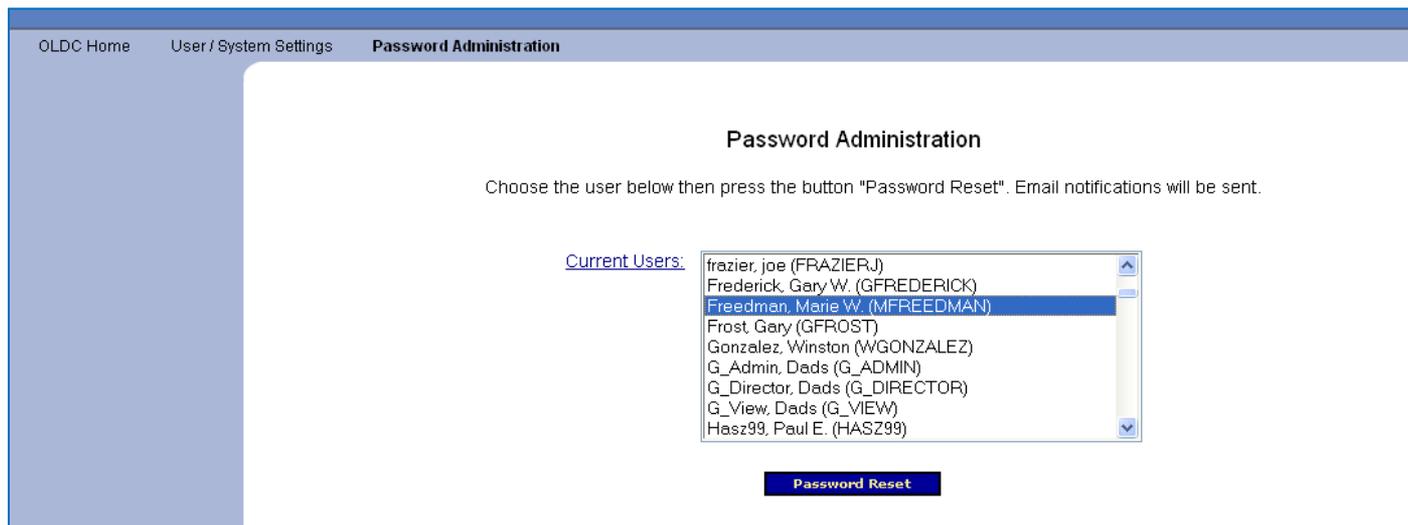
- A confirmation message appears. Click **OK**
 - For new users, this is the point where they will receive their User ID and Password



LESSON 5 – PASSWORD ADMINISTRATION

Password Administration

- Federal staff have the capability to reset passwords
- From OLDC Home, click the link **User/System Settings**
- Under the heading “System Settings”, click the link **Password Administration**. The “Password Administration” screen displays



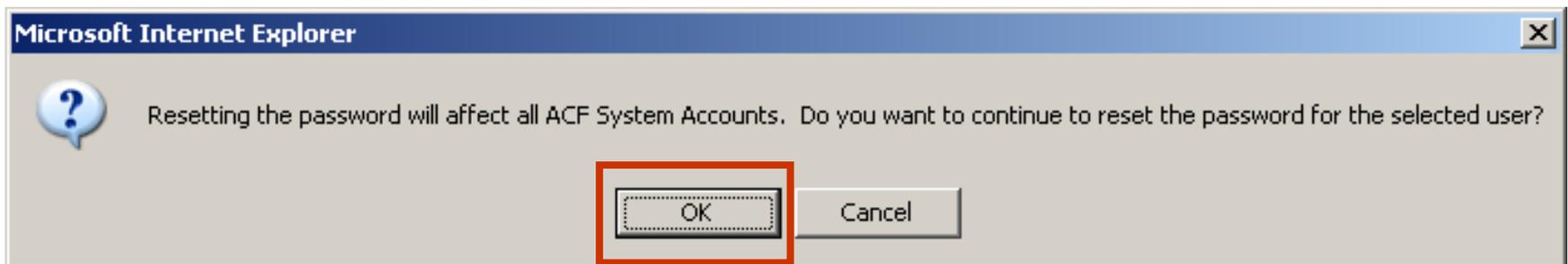
Password Administration

- From the *Current Users* box, click the name of the person who needs their password reset
- Click the **Password Reset** button

The screenshot shows a web application interface for password administration. At the top, there is a navigation bar with links for "OLDC Home", "User / System Settings", and "Password Administration". The main content area is titled "Password Administration" and contains the instruction: "Choose the user below then press the button 'Password Reset'. Email notifications will be sent." Below this instruction is a section labeled "Current Users:" followed by a list box containing the following entries: "frazier, joe (FRAZIER,J)", "Frederick, Gary W. (GFREDERICK)", "Freedman, Marie W. (MFREEDMAN)", "Frost, Gary (GFROST)", "Gonzalez, Winston (WGONZALEZ)", "G_Admin, Dads (G_ADMIN)", "G_Director, Dads (G_DIRECTOR)", "G_View, Dads (G_VIEW)", and "Hasz99, Paul E. (HASZ99)". The entry "Freedman, Marie W. (MFREEDMAN)" is currently selected. Below the list box is a blue button labeled "Password Reset", which is highlighted with a red rectangular border.

Password Administration

- 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**



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

Password Administration

- 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

LESSON 6 – DELETE USER

Delete User

- 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
- 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

Delete User

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

The screenshot displays two web forms side-by-side. The left form, titled "Edit Current User", features a search bar and a scrollable list of users. The user "Delete, Train (DELETET)" is selected and highlighted in blue. Below the list are buttons for "Edit Assignments", "Copy Assignments", and "Delete User", with the latter being highlighted by a red rectangular box. The right form, titled "Add New User", contains fields for Name (First, Middle, Last), Title, Address (Number, Street Name, Type, Street Type), Other, City, State, Zip, Email, and Telephone, along with "Add User" and "Person Search" buttons.

Edit Current User

Search Users:

Current Users:

- Acharya-Train, Hari (HACHARYATRIN1)
- Acyf1, Training (ACYF1)
- Admin, Grant (ADMINING)
- Alexander-Train, Abigail (AALEXANDERTRAIN)
- Amara-Train, Roel (RAMARATRIN)
- Behr-Train, Jeanne (JBEHRTRAIN)
- Berthold-Train, Megan (MBERTHOLDTRAIN)
- Berthrong-Train, Bill (BBERTHRONGTRAIN)
- Bieg-Train, Scott (SBIEGTRAIN)
- Bullock-Train, Allyce (ABULLOCKTRAIN)
- Cason99, Tymel (TCASON99)
- Christie, Amy (CHRISTIEA)
- Clements, Jaye Neice (CLEMENTSJ)
- Coakley2, Brooke (BRCOAKLEY2)
- Congdon-Train, Tonya (TCONGDONTRAIN)
- Delete, Train (DELETET)**

Delete User

Add New User

Name: First: * Middle: Last: *

Title:

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

Other:

City: State: Zip: -

Email: *

Telephone: () - Ext.

Add User **Person Search**

Delete User

- A message displays asking for verification to delete the user. Click **OK**



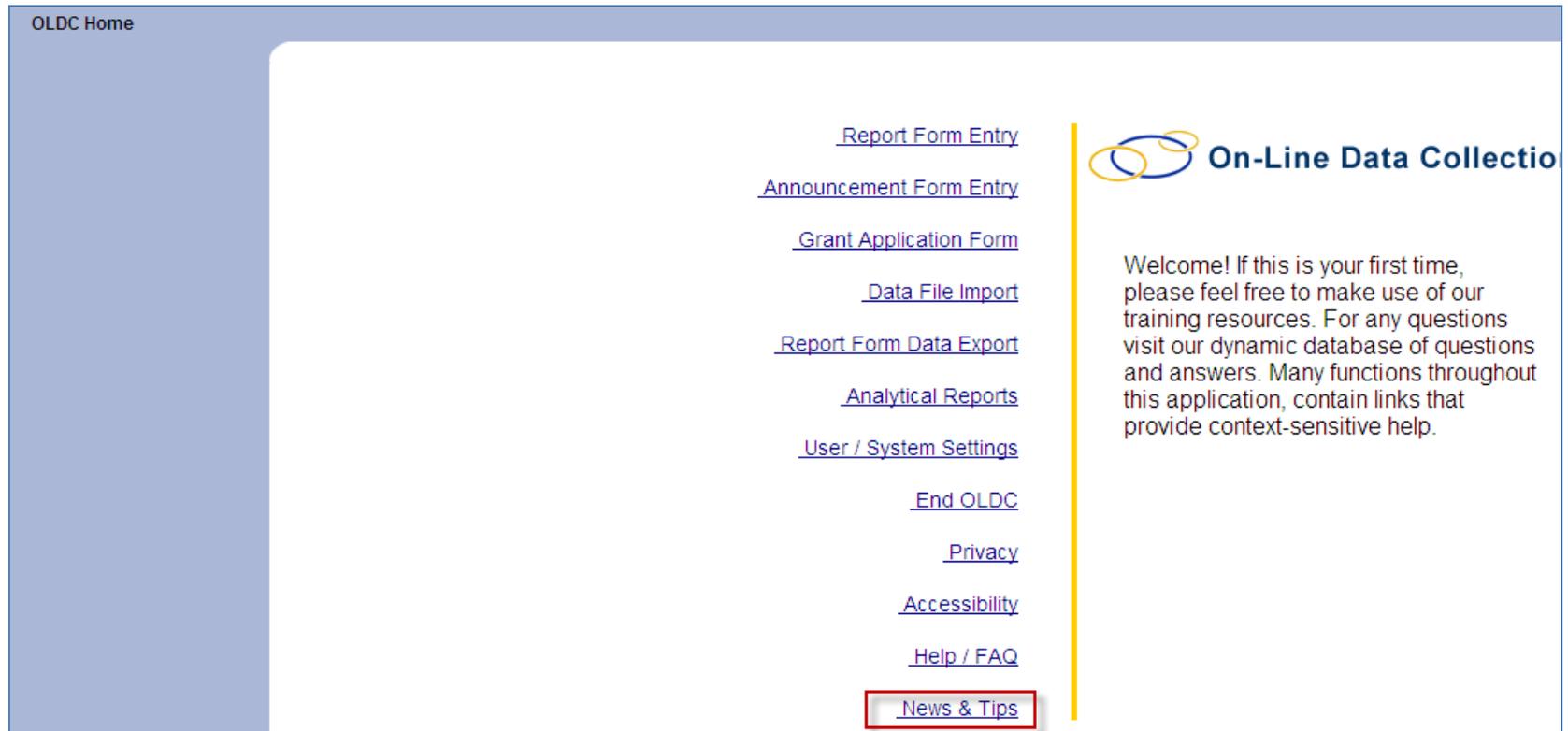
- A confirmation message displays



Resources

OLDC Support Site

- OLDC support materials are available from the Home screen by clicking the link **News & Tips**
 - Help Sheets, Tutorials, Guides



OLDC Home

[Report Form Entry](#)

[Announcement Form Entry](#)

[Grant Application Form](#)

[Data File Import](#)

[Report Form Data Export](#)

[Analytical Reports](#)

[User / System Settings](#)

[End OLDC](#)

[Privacy](#)

[Accessibility](#)

[Help / FAQ](#)

[News & Tips](#)

 **On-Line Data Collectio**

Welcome! If this is your first time, please feel free to make use of our training resources. For any questions visit our dynamic database of questions and answers. Many functions throughout this application, contain links that provide context-sensitive help.

Custom Application Help Desk

- Need help? Contact us at:
 - App_support@acf.hhs.gov
 - 1-866-577-0771

Questions and Answers