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

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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
• 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
• “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
Add New User

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

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.
Add New User

- Click **Assignment Delegation**
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
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
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.
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
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.
• Click the **Load/Refresh List** button
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
The “Assign Grantees” screen displays. Select one or more checkboxes next to desired programs and click the **Load/Refresh Grantee List** button.
• 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
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
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.
• To assign grant specific assignments, use the tree to return to the Programs list
  – Click Programs
The *Assign Programs* screen displays
- Select a Job Type and click the **Load/Refresh Grantee List** button
Edit Assignments

• The list of available programs displays
  – Select one or more programs from the Select column and click the Next button
The “Assign Grantees” screen displays
- Select a program and click the **Load/Refresh Grantee List** button
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
The “Assign Grants” screen displays

- Select a Grantee Organization to view its grants, and then click the **Load/Refresh Grant List** button
Edit Assignments

- All grants available for assignment display
  - Select the grants to assign, and whether they should be Primary Contact or have Notify on Submit. Click the **Save** button

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[Image of chart showing Edit Assignments interface]
Edit Assignments

- The Program and Grant are now assigned
- Click **Program** from the assignment tree to view all active 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
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.
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
- 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
From the “Roles and Assignments” screen, select a user to receive roles and click the Copy Assignments button.
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.

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

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

  ![Warning Message]

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

  ![Confirmation Message]
LESSON 5 – 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 current users and allows for password reset.
Password Administration

- From the *Current Users* box, click the name of the person who needs their password reset
- Click the **Password Reset** button
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.
From the “Roles and Assignments” screen, select the user to delete from the “Edit Current User” list

Click the **Delete User** button
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
Custom Application Help Desk

• Need help? Contact us at:
  – App_support@acf.hhs.gov
  – 1-866-577-0771
Questions and Answers