



Linking Services, Solutions, Communities

Family Violence Prevention Services (FVPS)

OLDC

(Online Data Collection)

Assignment Delegation – Grant Partners

Courseware

Version 2.0 – September 2012

The Grants Center of Excellence

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

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About This Guide

The *Online Data Collection (OLDC) Assignment Delegation User Guide* was developed to assist users 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:

- Lesson 1: Introduction
- Lesson 2: Add a New Account
- Lesson 3: Edit Assignments
- Lesson 4: Copy Assignments
- Lesson 5: Delete User
- Lesson 6: Password Administration

Lesson 1: Introduction

The Online Data Collection (OLDC) system is role-based and 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 sometimes given the Submit role.

The Assignment Delegation module allows the OLDC Grant Administrator to create new accounts or modify existing ones. Each account must have at least one program and one Job Type assigned. This can be achieved through the “Edit Assignments” section **or** the “Copy Assignments” section. The “Edit Assignments” section allows the administrator to assign programs 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](#).

Lesson 2: Add a New Account

Add New User

OLDC Grant Administrators may create new user accounts. To create a new OLDC account, complete the following steps:

1. Login to Secure Sign-In.

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.

Did you know

Did you know that OLDC has capabilities to assist users

Welcome to
Secure Sign-In

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 on the applications, please feel free to contact the

Sign-in to My Account

User Name

Password

Login

[Forgot Login Info?](#)

[Login Help](#)

2. Click the **OLDC** button.

United States Department of
Health & Human Services

Current User: awalters1
Current Environment: Training
Last Login: 08/30/12 10:00:20 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

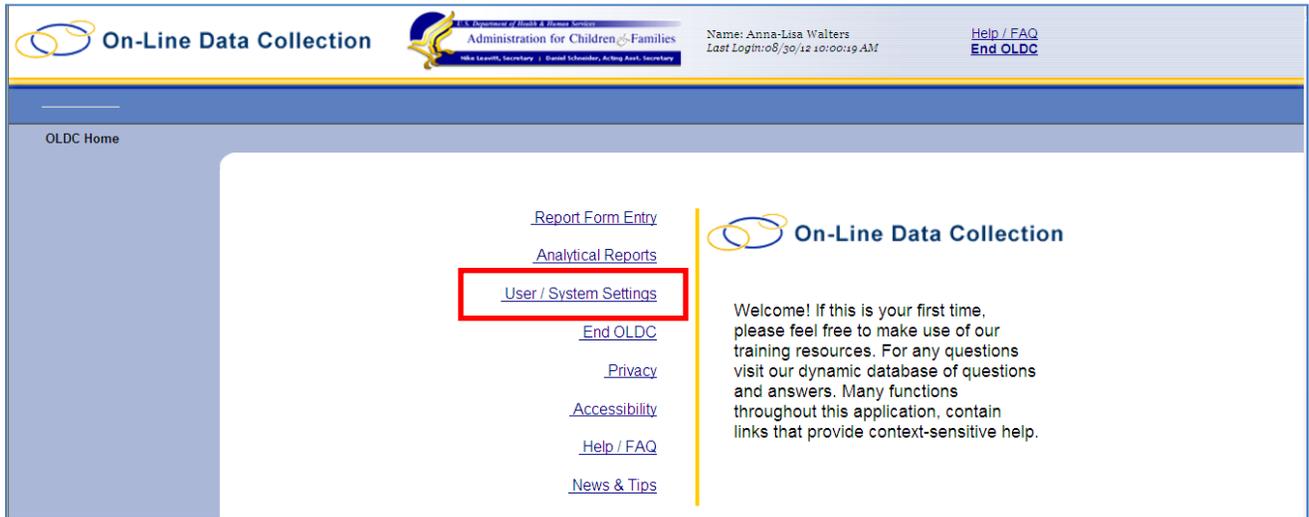
OLDC

Alerts & Announcements

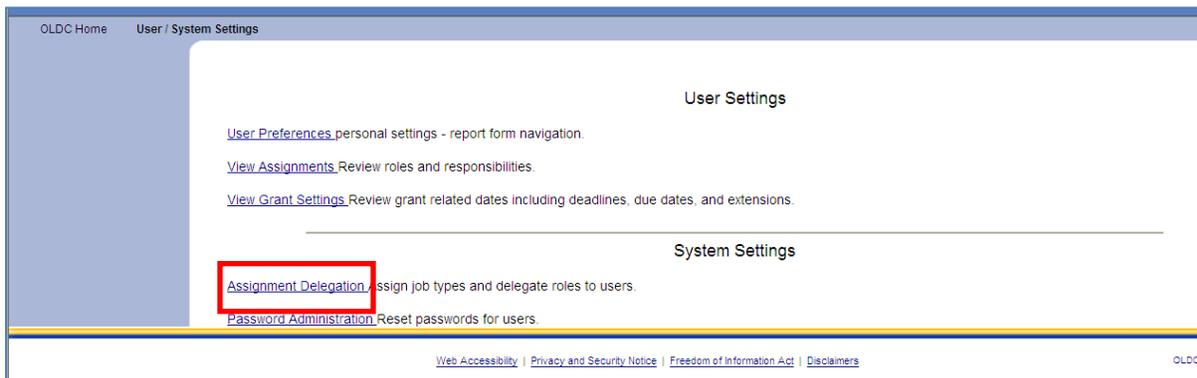
[HHS Home](#) | [Questions?](#) | [Contact HHS](#) | [Site Map](#) | [Accessibility](#) | [Privacy Policy](#) | [Freedom of Information Act](#) | [Disclaimers](#)

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

3. Click **User/System Settings**.



4. Under System Settings, click **Assignment Delegation**.



- The Assignment Delegation screen displays. To ensure the user does not already exist in the system, enter their last name followed by their first name in the “Edit Current User” search box.

The screenshot shows the 'Roles and Assignments' interface. It includes instructions for 'Current Users' and 'New Users'. The 'Edit Current User' section has a search box containing 'jones, anna' and a list of current users. The 'Add New User' section contains various input fields for user information.

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 action 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 the process.

Edit Current User

Search Users: jones, anna

Current Users: Coakley2, Brooke (BRCOAKLEY2)
Edelman, Peter R (PEDELMAN)
Freeman99, Latonya (LFREEMAN99)
FVPS, TEST (FVPST)
Internal, Eavs (EAVS_INTERNAL)
Internal, Oldc (OLDC_INTERNAL)
KK2, KK1 (KKK2)
KKM2, KKM1 (KKM2K)
Newssi, Testing30 (TNEWSSI)
Peel, Patricia (PEELP)
Randall99, Shervonne (SRANDALL99)
Robinson99, Antonio (AROBINSON99)
Rouse99, Richard (RROUSE99)
Stewart99, Lawanne (LSTEWART99)
Test, Avail (DBTEST)
TEST, FVPS (TESTF)

Add New User

Name: First: * [] Middle: [] Last: * []

Title: []

Address: Number: [] Street Name: [] Type: Street Type: []

Other: []

City: [] State: [] Zip: [] - []

Email: * []

Telephone: ([]) [] - [] Ext: []

Buttons: Add User, Person Search, Create/Assign Requested Accounts, Edit Assignments, Copy Assignments, Delete User

Once confirmed the person does not yet have an account, begin completing the information in the “Add New User” section on the right side of the screen.

- Type the user’s **First Name**.
- Type the user’s **Middle Initial** (optional).
- Type the user’s **Last Name**.
- Type the user’s **Title** (only required if person needs signature authority).
- Type the user’s **Address** (optional).
- Type the user’s **E-mail address**.

TIPS

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

- 12. Type the user's **Telephone Number**.
- 13. Click the **Add User** button.

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 process.

Edit Current User

Search Users: jone, anna

Current Users:

- Peel, Patricia (PEELP)
- Randall99, Shervonne (SRANDALL99)
- Robinson99, Antonio (AROBINSON99)
- Rouse99, Richard (RROUSE99)
- Stewart99, Lawanne (LSTEWART99)
- Test, Avail (DBTEST)
- TEST, FVPS (TESTF)
- Trainee100, Training (TRAINEE100)
- Trainee21, Training (TRAINEE21)
- Trainee22, Training (TRAINEE22)
- Trainee23, Training (TRAINEE23)
- Trainee24, Training (TRAINEE24)
- Trainee25, Training (TRAINEE25)
- Trainee26, Training (TRAINEE26)
- Trainee27, Training (TRAINEE27)
- Trainee28, Training (TRAINEE28)

Edit Assignments Copy Assignments Delete User

Add New User

Name: First: * Anna Middle: Last: * Jone

Title: Director

Address: Number: 1234 Street Name: Happy Type: Shoals

Other:

City: Rockville State: MD Zip: 20853

Email: * email@email.com

Telephone: (301) 555 - 1212 Ext:

Add User Person Search Create/Assign Requested Accounts

- 14. The Secure Sign-In security message appears. Click **OK**.



- 15. The "A new user has been added" message box appears. Click **OK**.



• 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 U process.

Edit Current User

Search Users:

Current Users:

- FVPS, TEST (FVPST)
- Internal, Eavs (EAVS_INTERNAL)
- Internal, Oldc (OLDC_INTERNAL)
- Jone, Anna (JONEA)**
- KK2, KK1 (KKK2)
- KKM2, KKM1 (KKM2K)
- Newssi, Testing30 (TNEWSSI)
- Peel, Patricia (PEELP)
- Randall99, Shervonne (SRANDALL99)
- Robinson99, Antonio (AROBINSON99)
- Rouse99, Richard (RROUSE99)
- Stewart99, Lawanne (LSTEWART99)
- Test, Avail (DBTEST)
- TEST, FVPS (TESTF)
- Trainee100, Training (TRAINEE100)
- Trainee21, Training (TRAINEE21)

Edit Assignments Copy Assignments Delete User

Add New User

Name: First * Middle: Last *

Title:

Address: Number: Street Name: Type:

Other:

City: State: Zip: -

Email: *

Telephone: () - Ext.

Add User Person Search Create/Assign Requested Accounts

TIPS

OLDC automatically creates new User IDs and Passwords:

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

The new user does not receive the e-mails with their User Name and Password until a program and Job Type are assigned.

Lesson 3: Edit Assignments

Once a new user is added to the system, the next step is to assign a program and *Job Type*. A Job Type is an OLDC title that contains a group of permissions called *Roles*. There are five grantee Job Types[†] 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. Grant Director may be given other available permissions if more direct control over grants is required.

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. Contact the Support Center to assign a new Grant Administrator.

View-Only - Read and print report forms, but cannot perform any action such as data entry.

BE AWARE

Grant Administrators do not have the ability to create another user with the Grant Administrator Job Type. Only Federal or Service Center staff can assign that Job Type. However, a Grant Administrator may give all roles with delegation capability to a user with a different Job Type.

[†]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 assign or edit permissions, complete the following steps:

1. Select the user’s name from the “Edit Current User” box.
2. Click the **Edit Assignments** button.

• 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 U process.

Edit Current User

Search Users:

Current Users:

- FVPS, TEST (FVPST)
- Internal, Eavs (EAVS_INTERNAL)
- Internal, Oldc (OLDC_INTERNAL)
- Jone, Anna (JONEA)
- KK2, KK1 (KKK2)
- KKM2, KKM1 (KKM2K)
- Newssi, Testing30 (TNEWS30)
- Peel, Patricia (PEELP)
- Randall99, Shervonne (SRANDALL99)
- Robinson99, Antonio (AROBINSON99)
- Rouse99, Richard (RROUSE99)
- Stewart99, Lawanne (LSTEWART99)
- Test, Avail (DBTEST)
- TEST, FVPS (TESTF)
- Trainee100, Training (TRAINEE100)
- Trainee21, Training (TRAINEE21)

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** **Create/Assign Requested Accounts**

TIPS

The Edit Current User list is sorted alphabetically by last name.

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 Grant Administrator to navigate permissions directly from the side bar.

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

[Current Assignments](#)

User: Jone, Anna (JONEA)

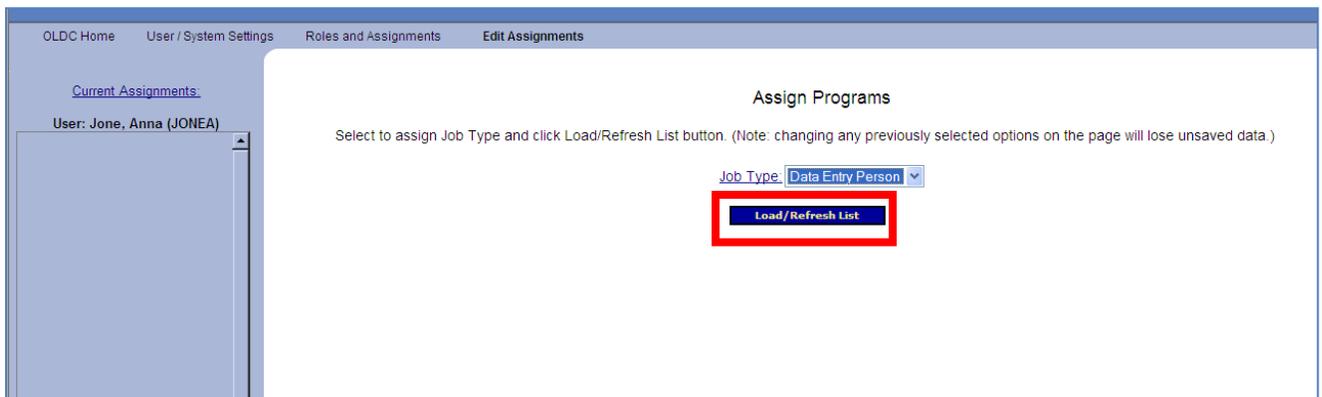
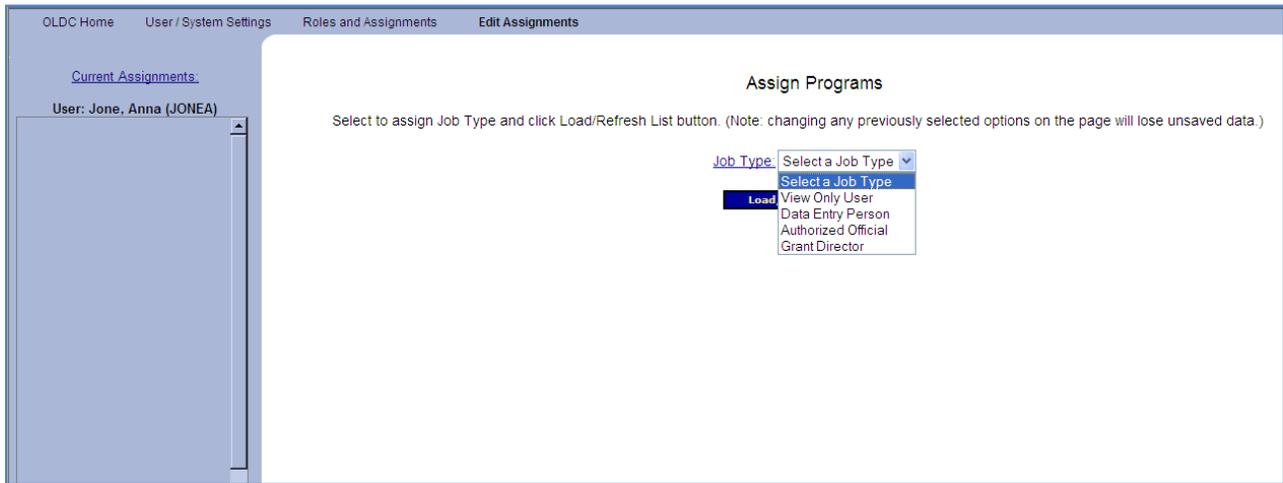
Assign Programs

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

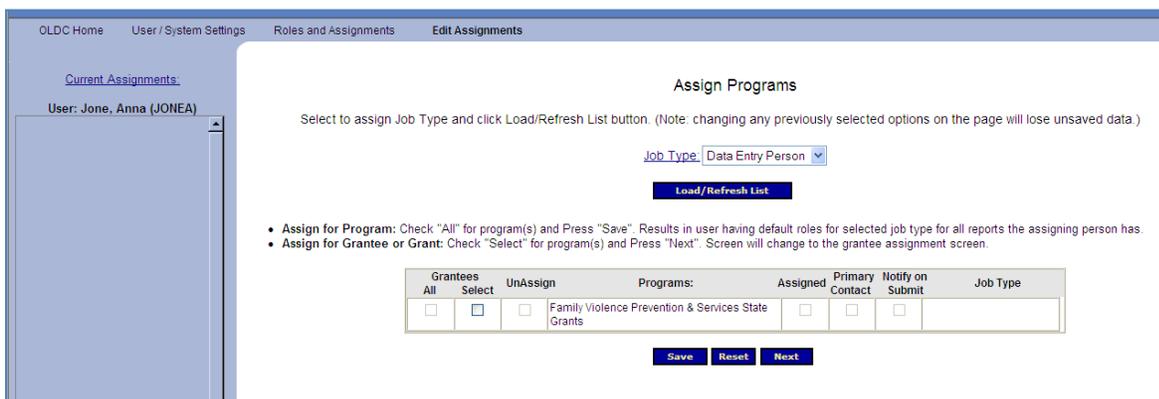
Job Type:

Load/Refresh List

- Select a Job Type and click the **Load/Refresh List** button. The program displays below the previously selected Job Type.



- All programs assigned to the Grant Administrator display. In this example, the Grant Administrator is only assigned to the program *Family Violence Prevention and Services State Grants*.



6. Click the **Select** checkbox under the Grantees column and click the **Next** button.

Roles and Assignments Edit Assignments

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: 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 assigning person has.
- **Assign for Grantee or Grant:** Check "Select" for program(s) and Press "Next". Screen will change to the grantee assignment screen.

Grantees		UnAssign	Programs:	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select						
<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"/>	

Save Reset Next

7. The "Assign Grantees" screen displays. Select the desired 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: 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"/>	Family Violence Prevention & Services State Grants

Load/Refresh Grantee List

8. The grantee list displays below the previously selected program. Under the Grants column, click the **All** checkbox next to the appropriate grantee. In this case, selecting **All** assigns all grants for the program Family Violence Prevention & Services State Grants for the state of Connecticut.

Click the **Primary Contact checkbox** if desired (use if the person is a Certifier or if their name should appear as a contact on the Report Form Status page) Click the **Notify on Submit** checkbox if the user should receive e-mails once the Report form is submitted.

9. 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: 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)

- 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 assigning 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 Other							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region 01				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CONNECTICUT [1 061274678 A1]				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connecticut [1 066000798 K3]				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Previous **Save** Reset Next

TIP

To assign specific grant numbers instead of all grants, click the check box under the *Grants - Select* column instead of the *Grants - All* column.

10. The "Assign Grantees" screen refreshes and the Sidebar Assignment Tree is populated. Click the **Load/Refresh** button again to view the new assignments.

The user is now e-mailed their automatically generated ID and Password. The Grant Administrator is e-mailed confirmation that the new user is created.

Assign Grantees

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 data.)

Job Type: Data Entry Person

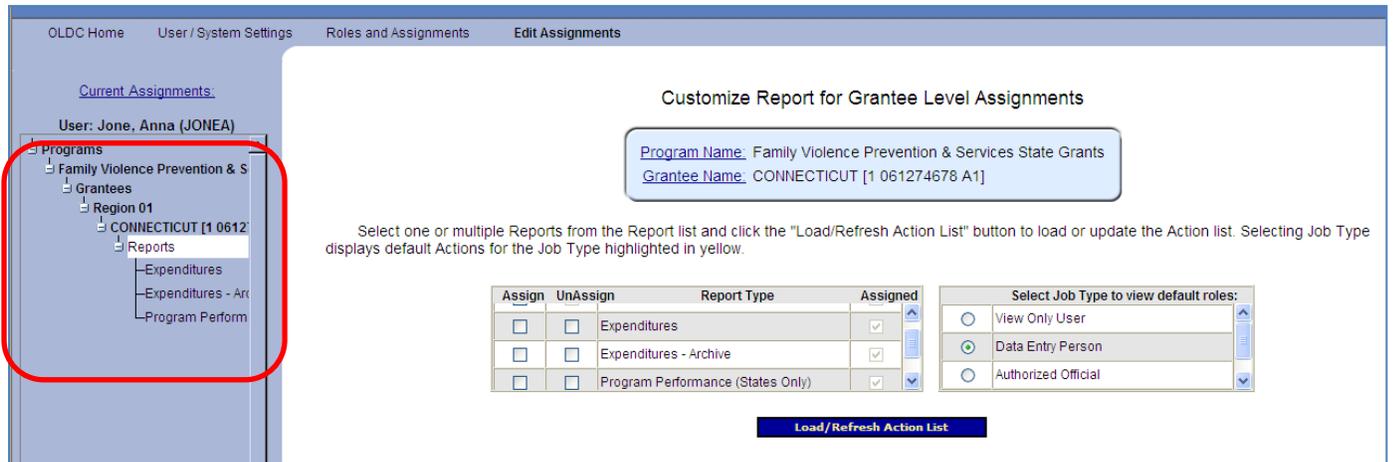
Load/Refresh List

- **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 assigning 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 Other							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region 01				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CONNECTICUT [1 061274678 A1]				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Data Entry Person
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connecticut [1 066000798 K3]				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Reset Next

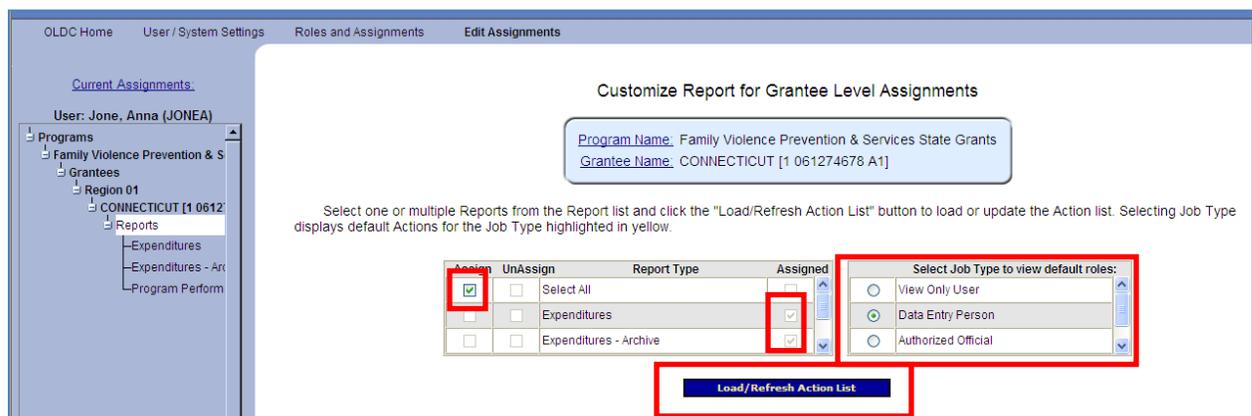
11. Additional permissions can be assigned to the user (such as Submit and Unsubmit). Use the Sidebar Tree to navigate to the “Customize Report for Grantee Level Assignments” screen.



12. 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 assignment, but instead highlights the default roles associated with the Job Type in the Action List.

Click the **Load/Refresh Action List** button.



13. The “Action List” displays. **The Action list is used to add or remove individual roles.** 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.

Please be aware that already assigned roles are only visible in the Action List when selecting one report at a time from the Report Type box.

Select	Action(s):	Can Delegate	Assigned
<input type="checkbox"/>	Director Query Authority	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Edit Existing Grant Form	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Edit Existing User	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Help/FAQs	<input type="checkbox"/>	<input type="checkbox"/>
<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 checked="" type="checkbox"/>	Submit Grant Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Un-submit Grant Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Personal Roles	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View Status/History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	View/Print Grant Form	<input type="checkbox"/>	<input type="checkbox"/>

14. Click the **Save** button. Once the screen re-appears, the changes are complete.

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

Lesson 4: Copy Assignments

When creating a new user, it is possible to copy the assignments from an existing user to a new account. 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.

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 U process.

Edit Current User

Search Users:

Current Users:

- Coakley2, Brooke (BRCOAKLEY2)
- Edelman, Peter R (PEDELMAN)
- Freeman99, Latonya (LFREEMAN99)**
- FVPS, TEST (FVPST)
- Internal, Eavs (EAVS_INTERNAL)
- Internal, Oldc (OLDC_INTERNAL)
- KK2, KK1 (KKK2)
- KKM2, KKM1 (KKM2K)
- NewsSI, Testing30 (TNEWSSI)
- Peel, Patricia (PEELP)
- Randall99, Shervonne (SRANDALL99)
- Robinson99, Antonio (AROBINSON99)
- Rouse99, Richard (RROUSE99)
- Stewart99, Lawanne (LSTEWART99)
- Test, Avail (DBTEST)
- TEST, FVPS (TESTF)

Add New User

Name: First: * Middle: Last: *

Title:

Address: Number: Street Name: Type:

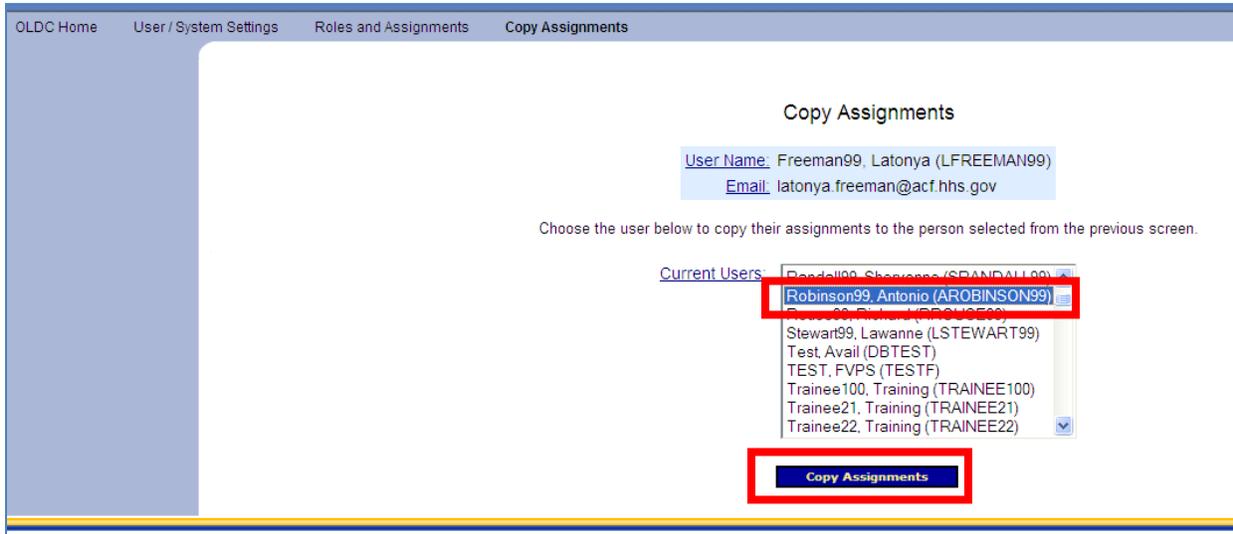
Other:

City: State: Zip: -

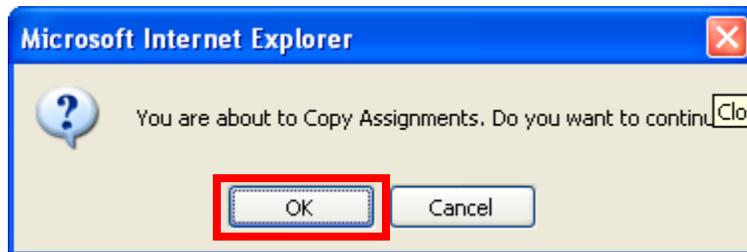
Email: *

Telephone: () - Ext.

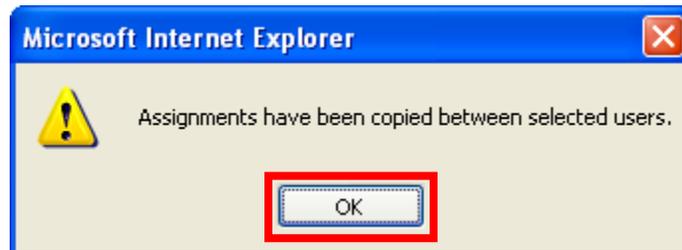
- The “Copy Assignments” screen displays. Choose a user from the Current Users list to copy assignments to the person selected on the previous screen.



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



- The message “The Assignments for the User have been copied between selected users” appears. Click **OK**.



6. The two users now have the exact same permissions. If the assignments were copied to a new account, the User Name and Password e-mails would now be sent to the new user.
7. Click the **Roles and Assignments** link from the top of the screen to return to the “Roles and Assignments” page or click the **End OLDC** button to exit the system.

Lesson 5: 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

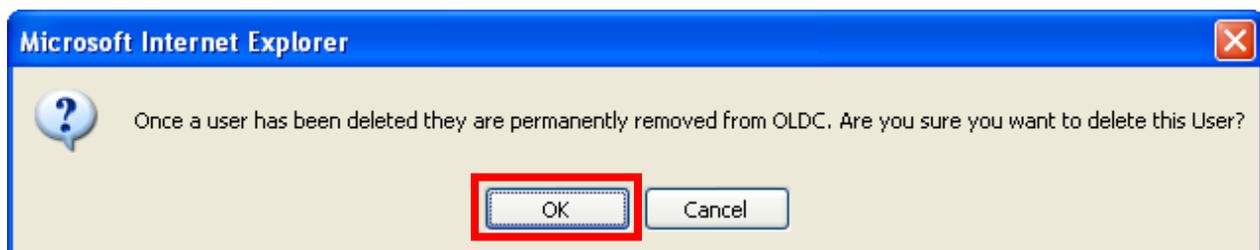
When a user's assignments are removed, their name still displays in the "Edit Current User" list. The name only disappears once the user is deleted.

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.

The screenshot shows the 'Edit Current User' interface. On the left, there is a list of 'Current Users' with 'Smith, Mary (SMITHM)' selected. Below the list, there are buttons for 'Edit Assignments', 'Remove Assignments', and 'Delete User'. The 'Delete User' button is highlighted with a red box. On the right, there is an 'Add New User' 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 'Add User' and 'Person Search' buttons at the bottom of the form.

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**.



Lesson 6: Password Administration

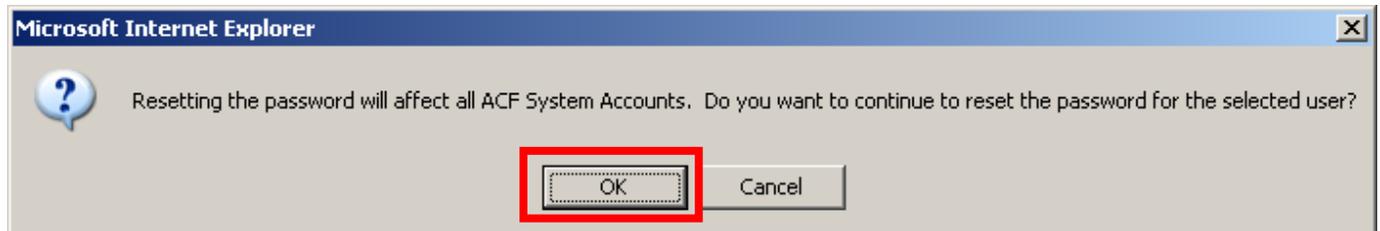
The Password Administration section gives users with the “Password Administration” role the capability to reset their staff’s passwords.

To reset a password, follow these instructions:

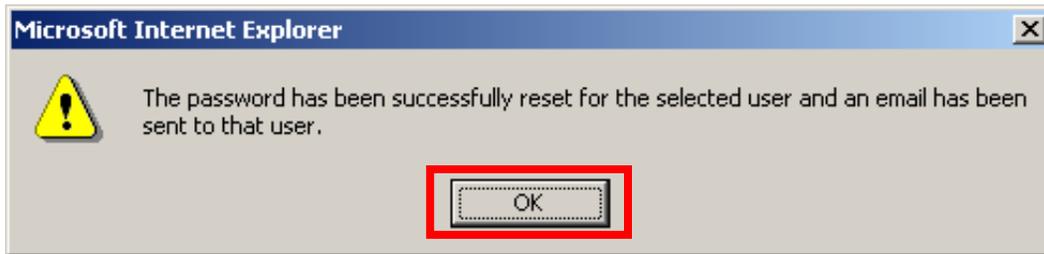
1. From OLDC Home, click the link **User/System Settings**
2. Under the heading “System Settings”, click the link **Password Administration**. The “Password Administration” screen displays.



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 email has been sent to that user” message appears. Click **OK**.



7. 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 ACF Grants Office for form assistance or the Support and Training Service Center for technical assistance 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.

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Appendix A: Job Types and Roles

List of Job Types

Grant Partners
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.
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.
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.

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 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.
Create New Grant Form	Creates a new form or report for a specific time period pertaining to the requirements of the grant.
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.
Director Certify Authority	"Officially" signs a form for submission. Is often used if a second signature is required for a report form. 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.
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.
Help/FAQs	Allows access to the features and functions of the OLDC Help program and Frequently Asked Questions (FAQ) database. Recommended for all users.
Password Administration	Allows the Grant Administrator to reset passwords for staff.

Role	Assignment
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.
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.
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.
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 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.



*The Grants Center
of Excellence*

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