



Online Data Collection

Assignment Delegation for Grantees

October 10, 2017

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About This Guide

The *Online Data Collection (OLDC) Assignment Delegation User Guide* is designed to assist grantees with administrative roles in creating new users, assigning job types and reports, assigning additional roles, copying permissions, and deleting users.

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, which is a title in the system such as Grant Director. Each Job Type consists of a group of roles (assigned permission). For example, the Data *Entry Job* Type contains the roles create, edit, validate, and attach documents to 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.

OLDC **Assignment Delegation** allows grantees with the *Grant Administrator* Job Type to create new, or modify existing accounts. Each account must have at least one **Program** and one **Job Type** assigned.

The Grant Administrator can assign permissions by either using the “Edit Assignments” **or** the “Copy Assignments” feature.

- Use **Edit Assignments** to manually assign Programs and Job Types to a new user.
- Use **Copy Assignments** to copy all permissions from an existing user to a new user.

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

Lesson 2: Add a New Account

ADD NEW USER

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

1. From an Internet browser (such as Internet Explorer Mozilla Firefox, or Google Chrome), go to www.grantsolutions.gov.
2. The “GrantSolutions” Home page appears. Click the **Login** button.

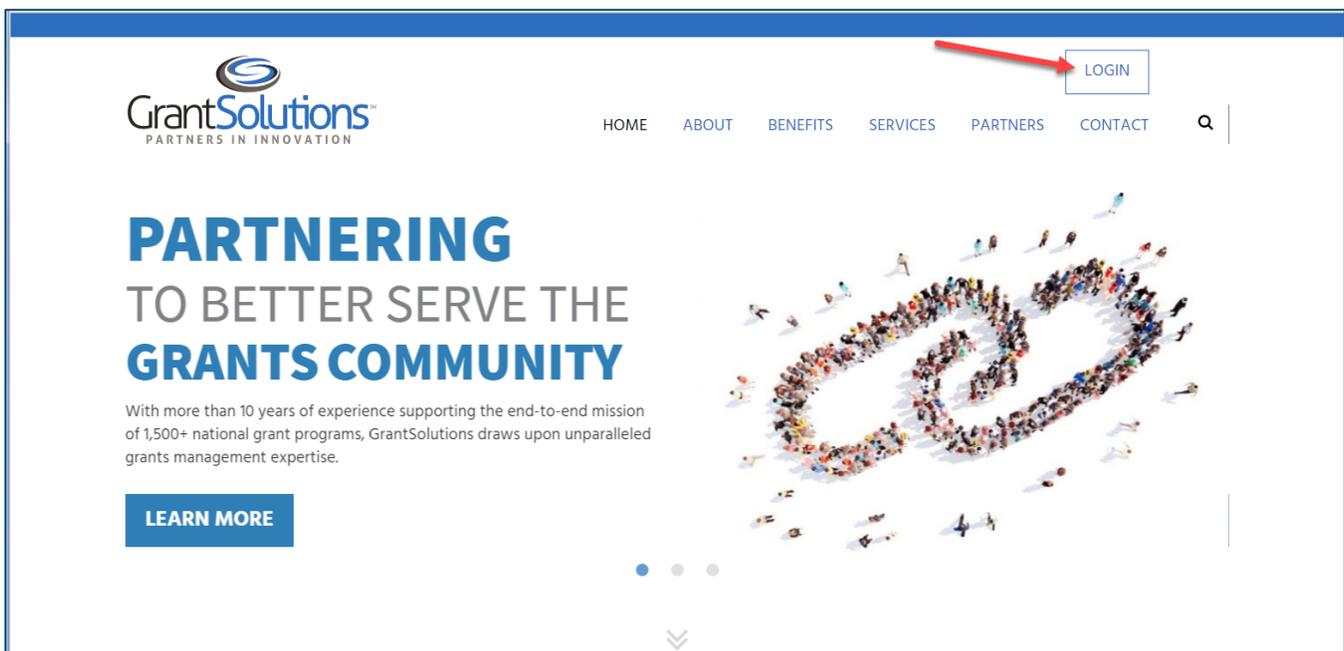


Figure 1: GrantSolutions public website - Login button

3. The “GrantSolutions.gov” login screen displays. Enter your existing GrantSolutions Grants Management Module (GMM) username in the **Username** field and the password in the **Password** field.
4. Click the **Login** button.

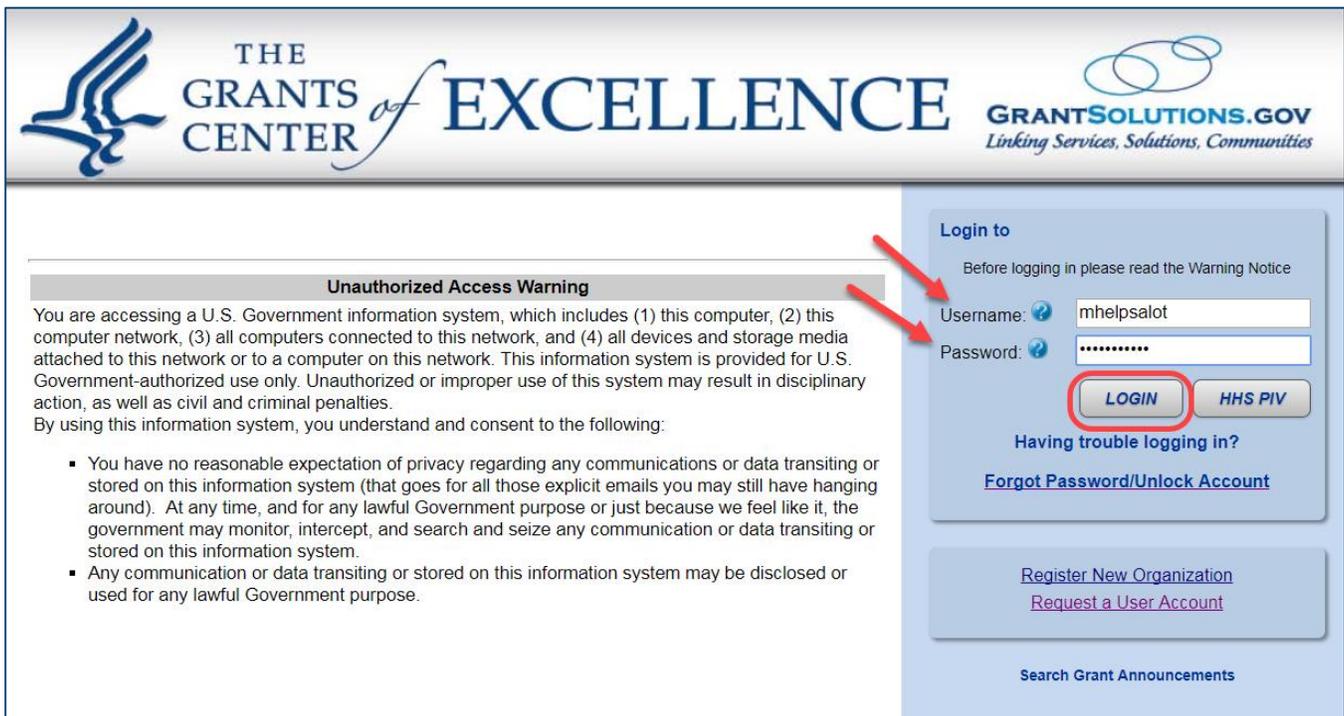


Figure 2: GrantSolutions login screen

5. The “My Grants List” screen appears. From the menu bar, select **Online Data Collection**.

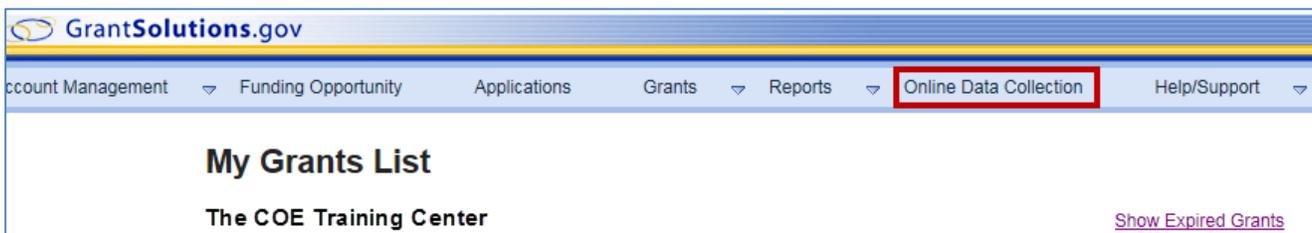


Figure 3: My Grants List - Online Data Collection menu option

6. The Online Data Collection “Home” page appears.

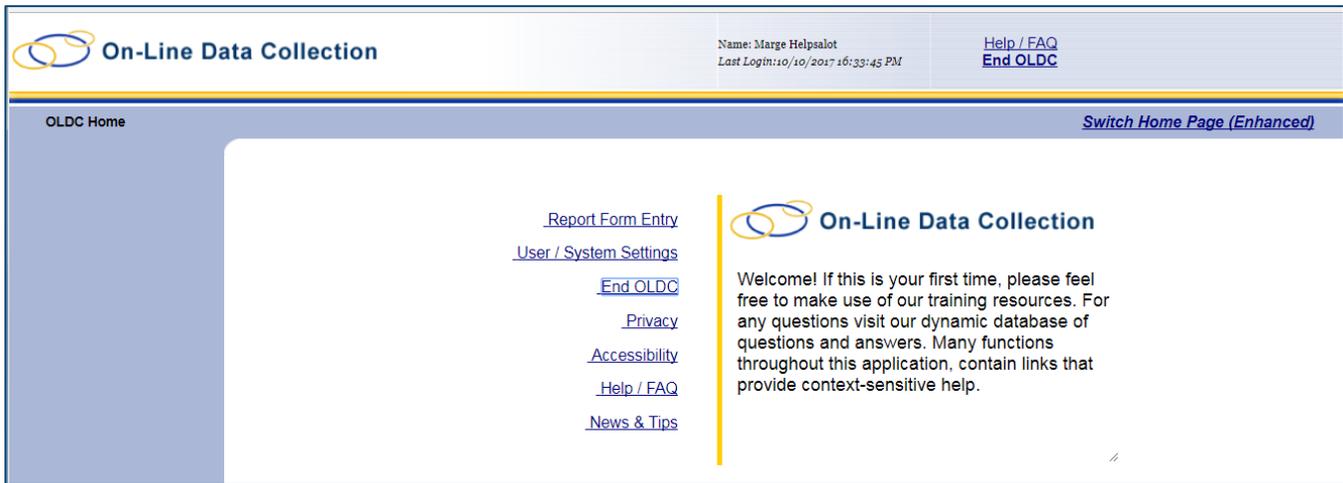


Figure 4: OLDC Home page

Login for Grantees That Do Not use the GrantSolutions GMM

Important! Grantees that do not use the GrantSolutions GMM access OLDC from the GrantSolutions “Portal” screen.

From the GrantSolutions Login screen, enter your **username** in the Username field and your **password** in the Password field. Click the **Login** button.

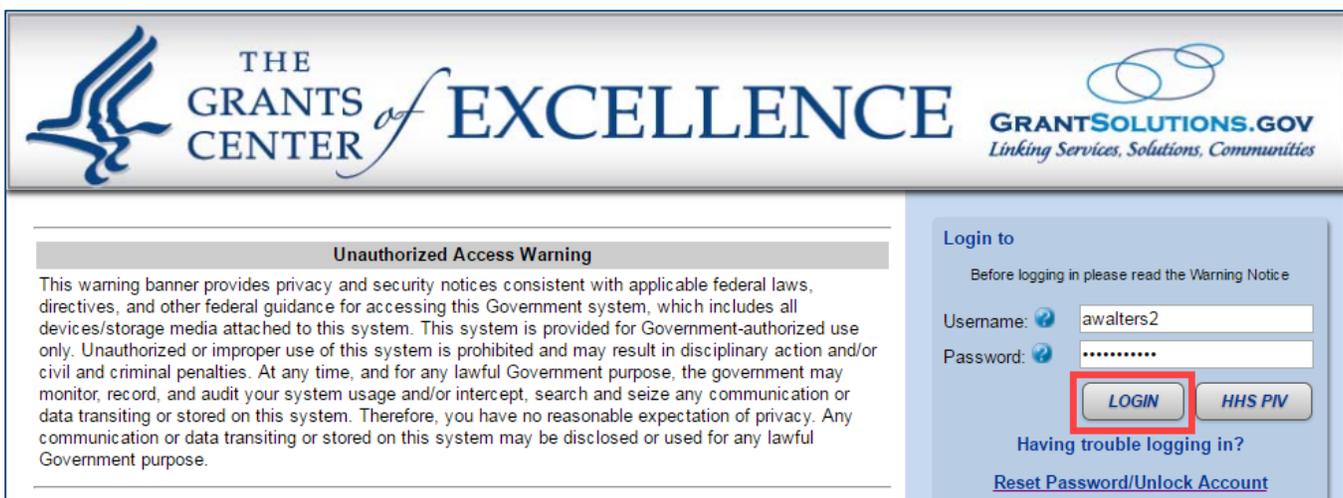


Figure 5: GrantSolutions login screen

The GrantSolutions “Portal” screen appears. From the menu bar, click **OLDC** to open the Online Data Collection “Home” page in a new window.

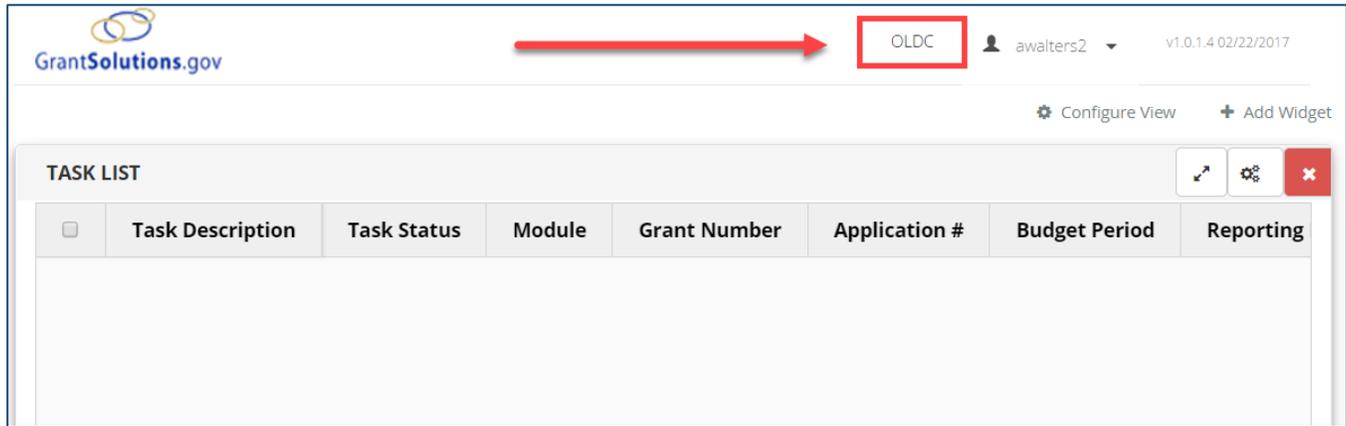


Figure 6: GrantSolutions "Portal" screen - OLDC menu

The Online Data Collection “Home” page appears.

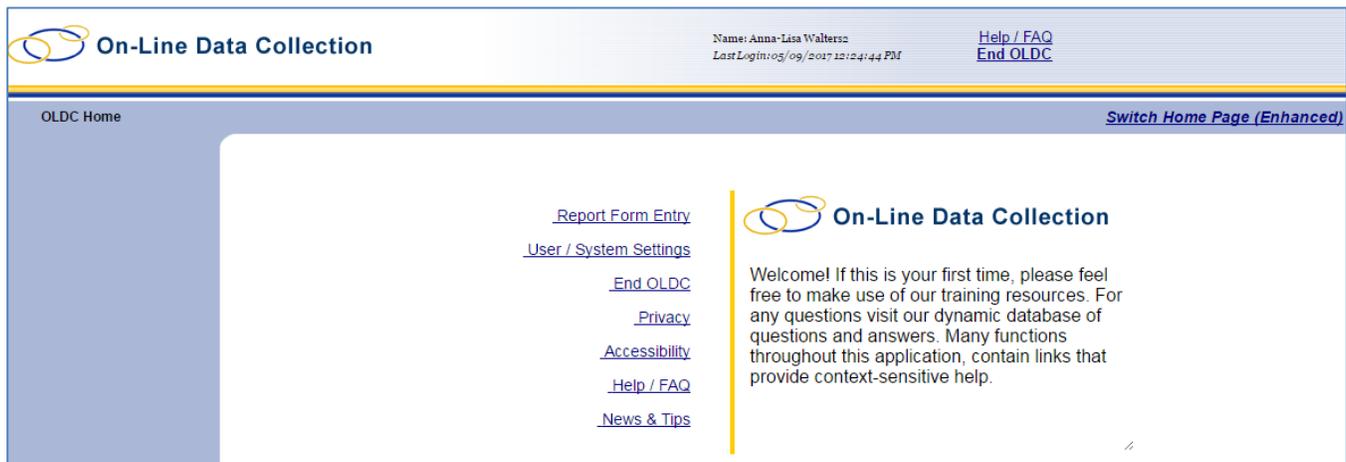


Figure 7: Online Data Collection “Home” page

7. From the menu list, click **User/System Settings**.

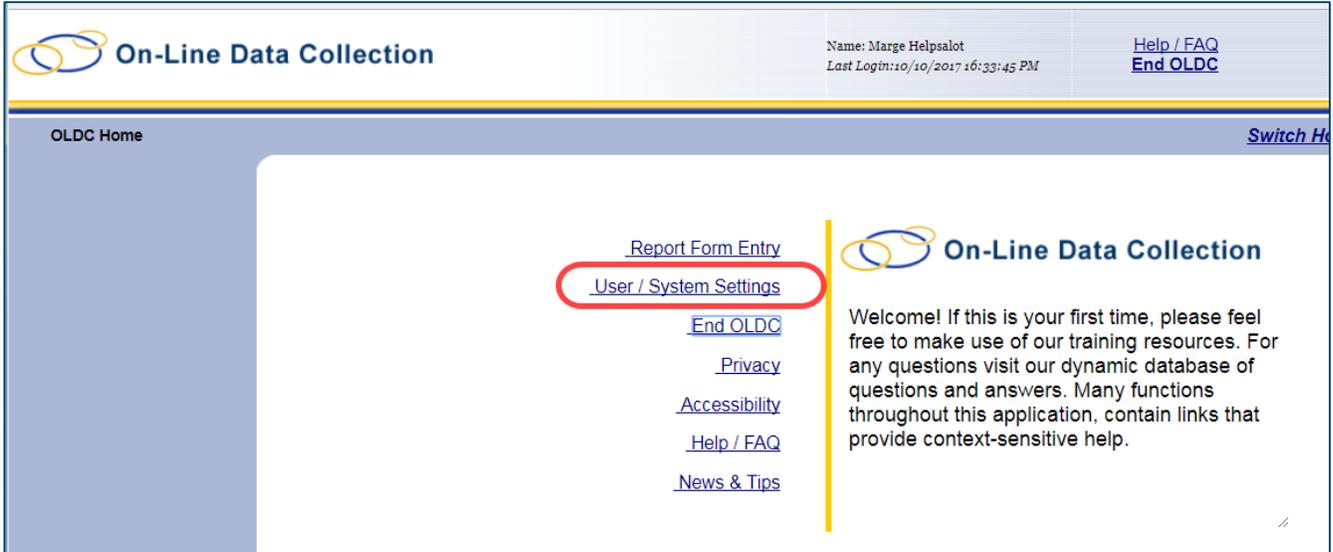


Figure 8: OLDC Home - User/System Settings

8. The “User/System Settings” page appears. Under *System Settings*, click **Assignment Delegation**.

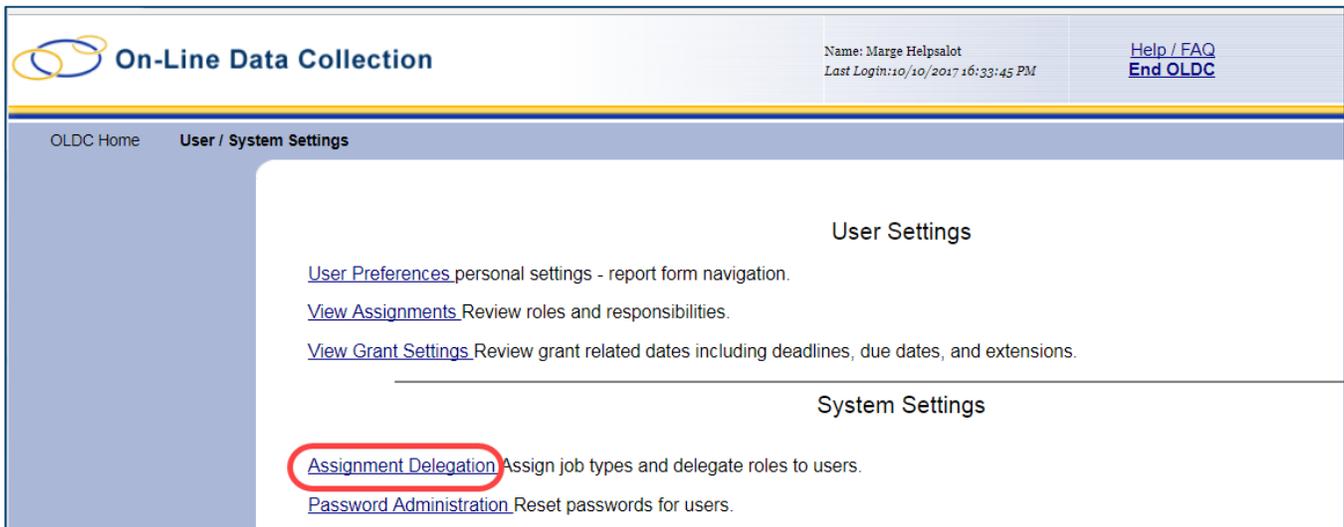


Figure 9: User/System Settings page - Assignment Delegation link

9. The “Roles and Assignments” screen displays.

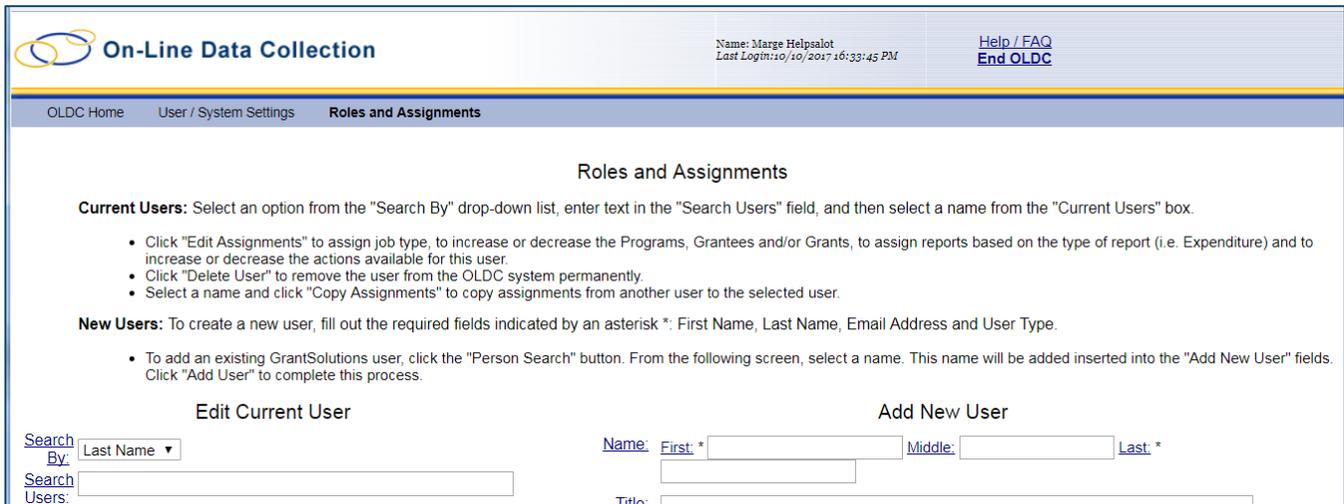


Figure 10: Roles and Assignments screen

10. In the *Edit Current User* portion of the screen, the *Search By* drop-down box defaults to Last Name. To determine if the user already has access to OLDC in GrantSolutions, enter their last name in the *Search Users* field.

Note: Use the Search By box to search by Last Name, First Name, or User Name.

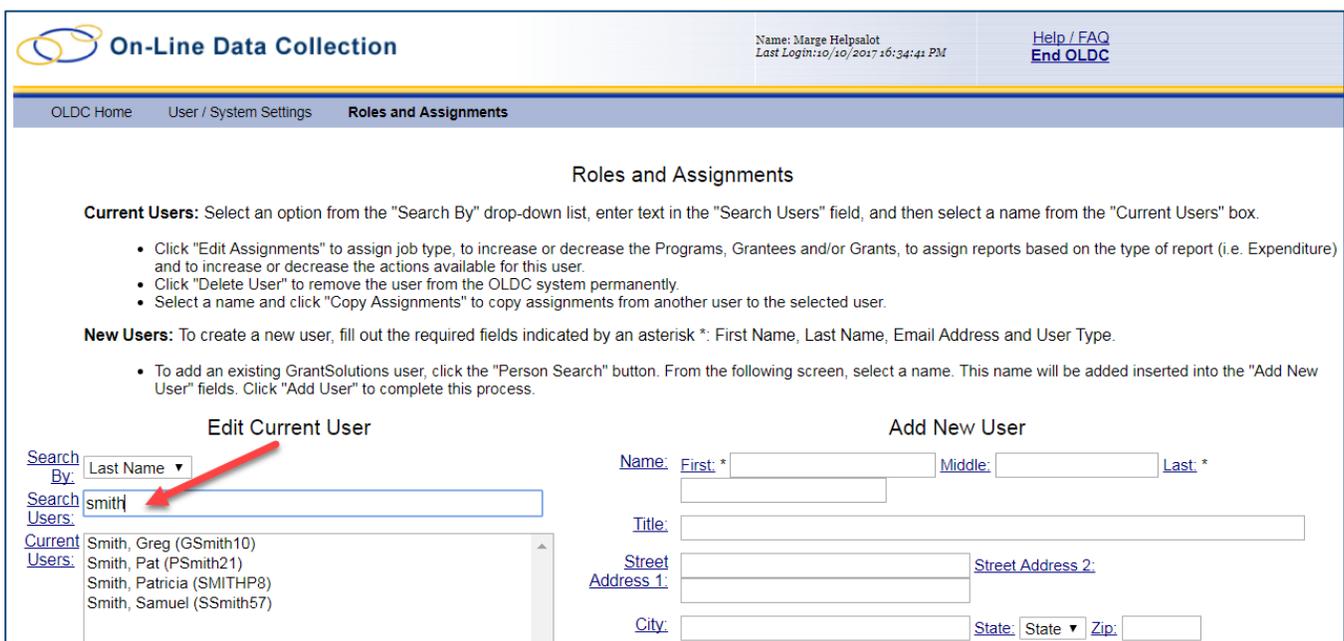


Figure 11: Roles and Assignments - Edit Current User list

- If the user appears in the Current Users list, select their name to make the assignments. If the user's name does not appear, they may still have a GrantSolutions account but do not yet have access to OLDC.

Click the **Person Search** button to search for the user in GrantSolutions.

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 an existing GrantSolutions user, click the "Person Search" button. 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 By: Last Name ▾

Search Users:

Current Users:

[Edit Assignments](#) [Copy Assignments](#) [Delete User](#)

Add New User

Name: First: * Middle: Last: *

Title:

Street Address 1: Street Address 2:

City: State: State ▾ Zip:

Email: *

Telephone: Ext.

[Add User](#) [Person Search](#) [Refresh Screen](#)

Figure 12: Roles and Assignments screen - Person Search button

- The "Person Search" screen appears. Enter search criteria (User ID, First and Last Name, or Email Address) and then click the **Person Search** button.

Name: Marge Helpsalot
Last Login: 10/11/2017 11:34:20 AM

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

OLDC Home
User / System Settings
Roles and Assignments
Person Search

Person Search

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

User ID:	<input type="text"/>	OR		
First Name:	<input type="text" value="Matt"/>	AND	Last Name:	<input type="text" value="Smith"/>
Email Address:	<input type="text"/>			

[Person Search](#) [Refresh Screen](#) [Help](#)

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

Select:	Last Name, First Name, MI:	Email Address:	User ID:	User Type:
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[Select Person](#)

Figure 13: Person Search screen - Criteria

13. If the users name appears, click the **checkbox** next to their name and then click the **Select Person** button.

Note: If the person's name does not appear, click the Roles and Assignments link towards the top of the page to return to the previous screen.

Figure 14: Person Search screen - Select Person

14. The “Roles and Assignments” screens appears. If the user selected from the Person Search has a GrantSolutions account but not access to OLDC, their profile information appears in the *Add New User* section of the screen. To provide access to OLDC, click the **Add User** button.

Note: If the user does not have a GrantSolutions account, the Grant Administrator can enter their information in the Add New User section and then click the Add User button.

Figure 15: Add New User section - Add User button

15. The security message appears. Click **OK** to continue.

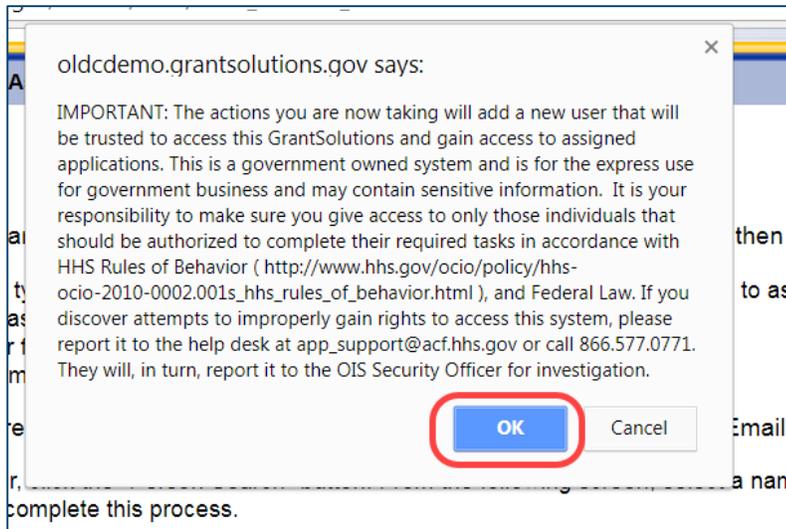


Figure 16: Security Message

16. The “User created successfully in OLDC” message box appears. Click **OK**.

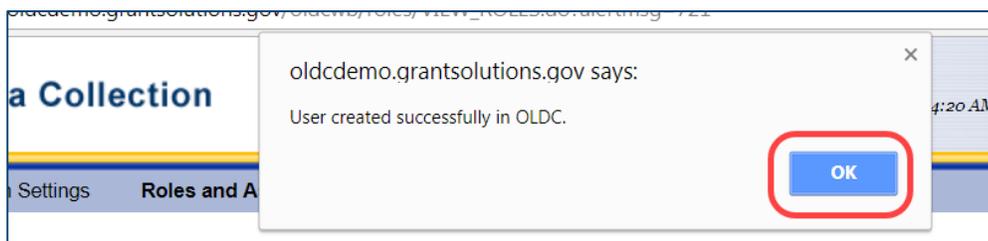


Figure 17: User Created Successfully message

17. The user’s name appears pre-selected in the *Edit Current User* list.



Figure 18: Roles and Assignments screen - Edit Current User list

New users (previously without a GrantSolutions account) do 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 Job Type and Program. 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 data into OLDC. The Data Entry Person can create and edit forms 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 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 accounts and assigning roles to Grantee staff. A Grant Administrator can create an account 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 - View and print forms, but cannot perform any action such as data entry.

BE AWARE

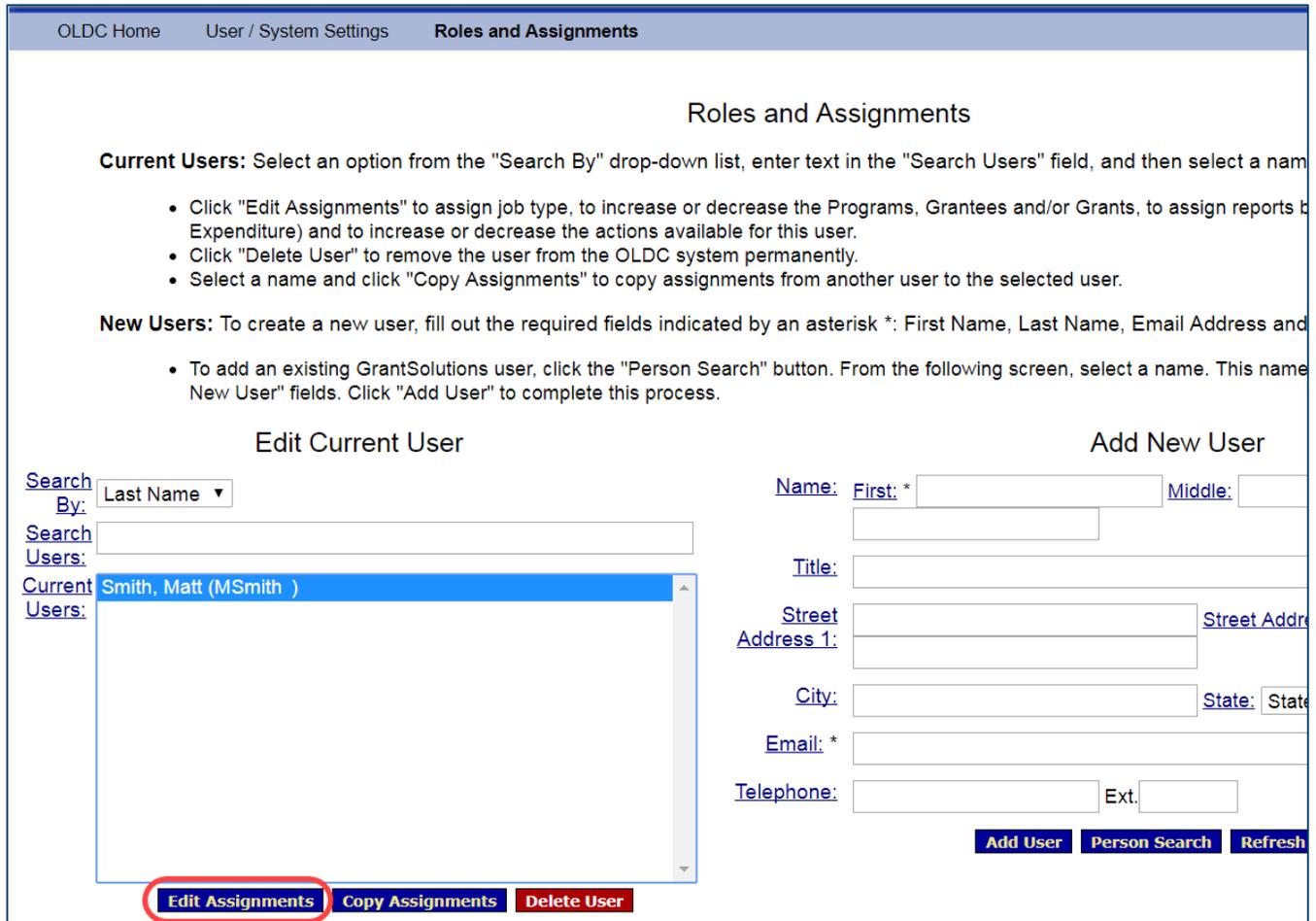
Grant Administrators do not have the ability to create another user with the Grant Administrator Job Type. Only Federal or Service Center staff can assign that Job Type.

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

Assign Program and Job Type

After a 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. Search for and select the user’s **name** in the *Edit Current User* box.
2. Click the **Edit Assignments** button.



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

Roles and Assignments

Current Users: Select an option from the "Search By" drop-down list, enter text in the "Search Users" field, and then select a name

- Click "Edit Assignments" to assign job type, to increase or decrease the Programs, Grantees and/or Grants, to assign reports to (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

- To add an existing GrantSolutions user, click the "Person Search" button. From the following screen, select a name. This name will appear in the "New User" fields. Click "Add User" to complete this process.

Edit Current User

Search By: Last Name ▾

Search Users:

Current Users: **Smith, Matt (MSmith)**

Add New User

Name: First: * Middle:

Title:

Street Address 1: Street Address 2:

City: State:

Email: *

Telephone: Ext.

Figure 19: Roles and Assignments screen - Edit Assignments button

- The “Assign Programs” screen displays. For new users without any previous assignments, the left side *Current Assignments* section is blank. As permissions are added, an assignment “tree” grows allowing the Grant Administrator to navigate permissions directly from the side bar.

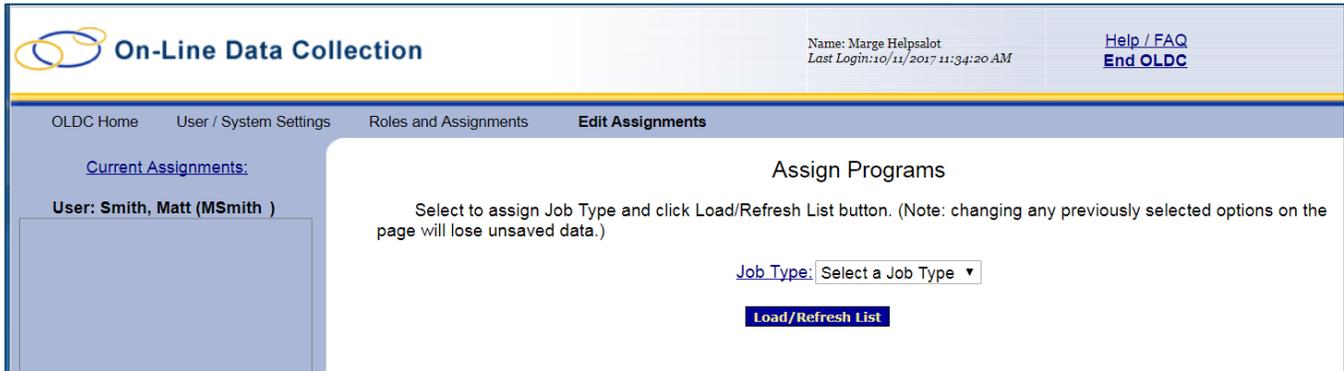


Figure 20: Assign Programs screen

- From the *Assign Programs* portion of the screen, select a **Job Type** and click the **Load/Refresh List** button.

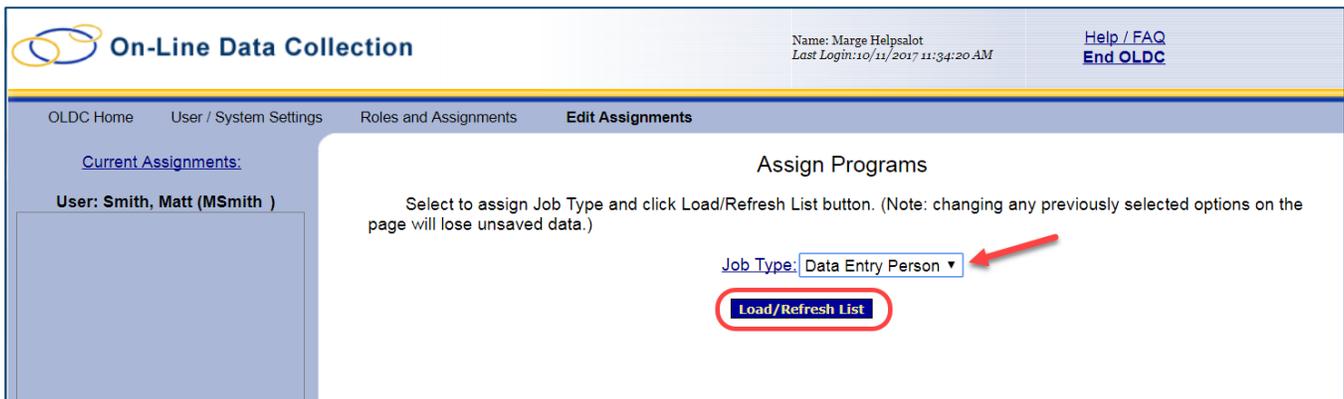
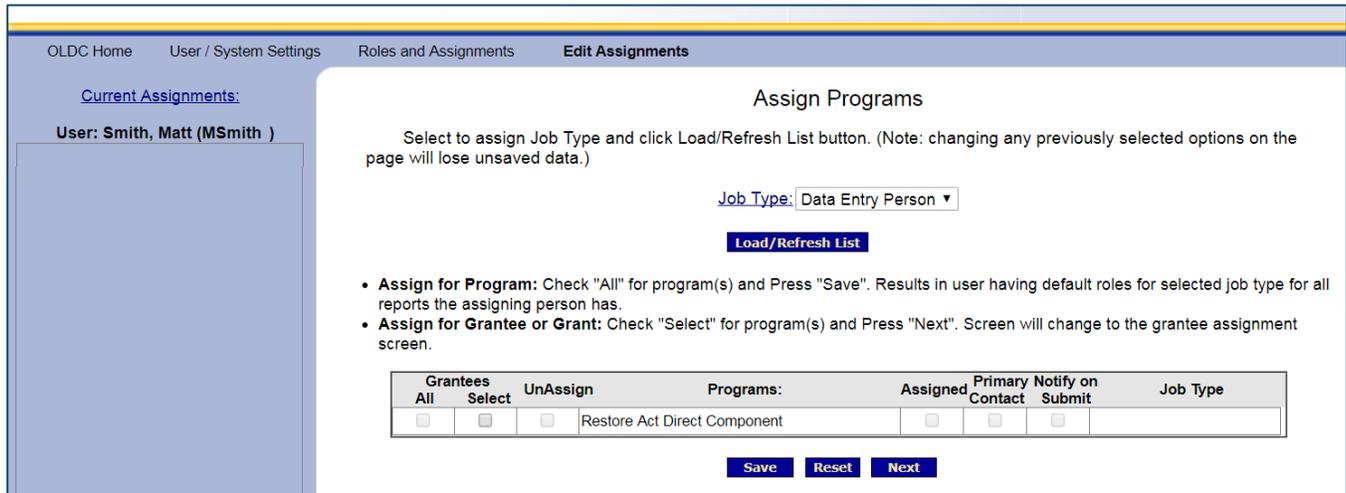


Figure 21: Assign Programs screen - Job Tye drop-down list and Load/Refresh List button

- All programs assigned to the Grant Administrator display. In this example, the Grant Administrator is only assigned to the program Restore Act Direct Component.



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

[Current Assignments:](#)

User: **Smith, Matt (MSmith)**

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

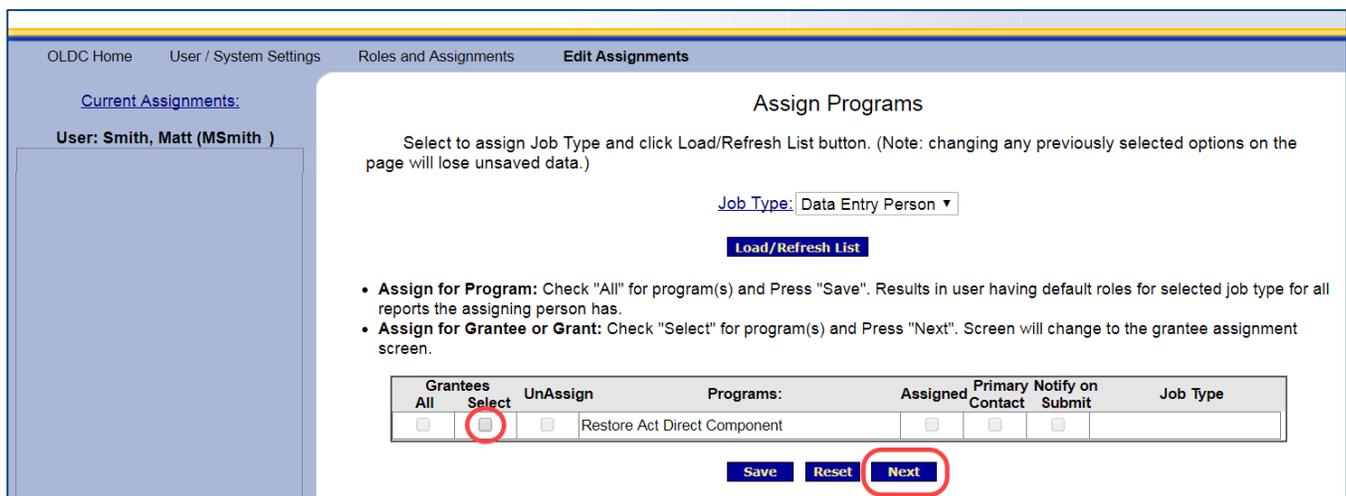
- Assign for Program:** Check "All" for program(s) and Press "Save". Results in user having default roles for selected job type for all reports the assigning person has.
- Assign for Grantee or Grant:** Check "Select" for program(s) and Press "Next". Screen will change to the grantee assignment screen.

Grantees		UnAssign	Programs:	Assigned	Primary Contact	Notify on Submit	Job Type
All	Select						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Restore Act Direct Component	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Reset Next

Figure 22: Assign Programs screen with Program assignment

- To assign one or more grants to the user for the program, click the **Select** checkbox from the *Grantees* column and then click the **Next** button.



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

[Current Assignments:](#)

User: **Smith, Matt (MSmith)**

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"/>	Restore Act Direct Component	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Save Reset Next

Figure 23: Assign Programs screen with Program assignment - checkboxes and Next button

- The "Assign Grantees" screen displays. Select the desired **program** and click the **Load/Refresh Grantee List** button.

Figure 24: Assign Grantees screen

- The grantee list displays below the previously selected program. Under the Grants column, click the **All** checkbox next to the grantee organization name to assign all grants available for the program.
 - Click the **Primary Contact** checkbox to indicate 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 form is submitted.
- Click the **Save** button.

Note: To only assign one of the available grants, click the Select checkbox and click the Next button. From the "Assign Grants" screen, select the desired grants and then click Save.

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"/>	Restore Act Direct Component

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 04		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bay County Board of County Commissioner [(2015-----)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Previous Save Reset Next

Figure 25: Assign Grantees screen - checkboxes and Save button

- The “Assign Grantees” screen refreshes and the *Current Assignments* Assignment Tree is populated. Expand the tree to view the new assignments.

New users (did not previously have a GrantSolutions account) are now e-mailed an automatically generated GrantSolutions username and Password. The Grant Administrator is e-mailed confirmation that the new user is created. Existing GrantSolutions users do not receive email notification.

A

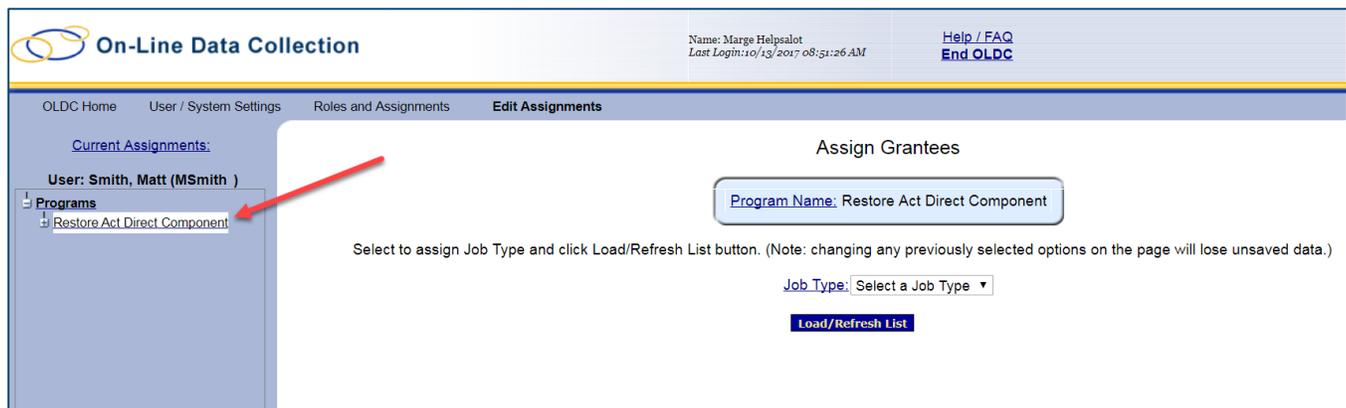


Figure 26: Assign Grantees screen and new Assignment Tree

CUSTOMIZE ROLES

Additional roles can be assigned to users (such as Submit and Unsubmit) as needed. To add or remove roles, perform the following steps.

- Use the Current Assignments tree to drill-down to the “Customize Report for Grantee Level Assignments” screen.

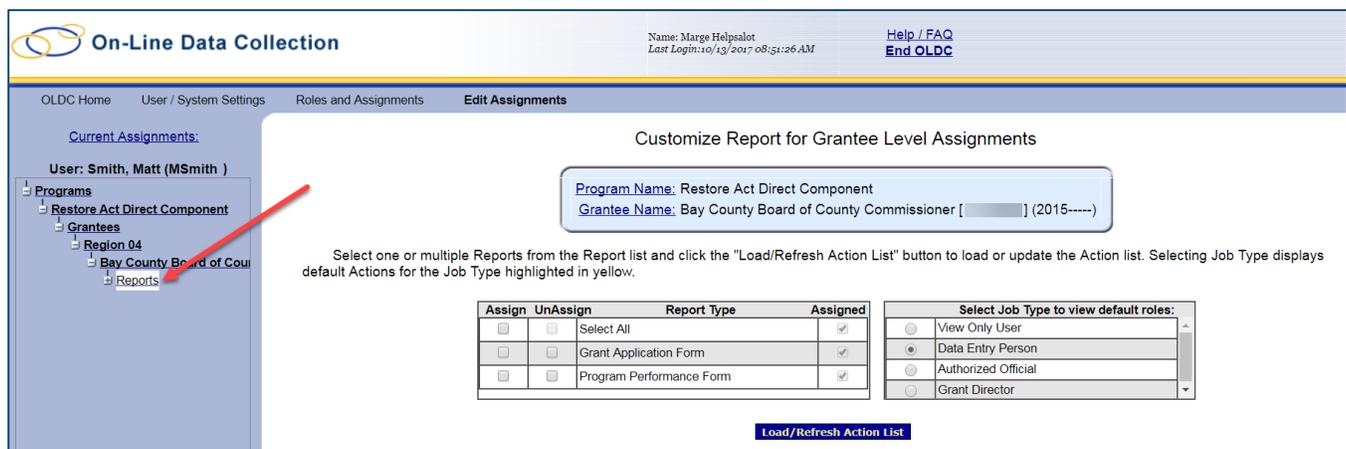


Figure 27: Expanded Assignment Tree and Customize Report for Grantee Level Assignments screen

- All available reports display in the *Report Type* 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 *Job Type list* and then click the *Load/Refresh Action List* button.

Note: Selecting a Job Type from this screen does not change the Job Type assignment, but instead highlights the default roles associated with the Job Type in the Action List.

Figure 28: Customize Report for Grantee Level Assignments screen with possible selections highlighted

- The screen refreshes and the *Action(s) List* displays towards the bottom of the screen. The Action list is used to add or remove individual roles. **Check** or **uncheck** roles to assign from the Select checkbox.

Note: Select one report at a time from the Report Type list to view previously assigned roles in the Action List.

- Click the **Save** button.

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

Select	Action(s):	Can Delegate	Assigned
<input checked="" type="checkbox"/>	Add File Attachments	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Add New User	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Add/Edit/Delete Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Certify with Signature Authority	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Create New Grant Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Delete Existing User	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Delete Grant Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Director Certify Authority	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Edit Existing Grant Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Existing User	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Help/FAQs	<input type="checkbox"/>	<input checked="" 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 type="checkbox"/>	Submit Grant Form	<input type="checkbox"/>	<input type="checkbox"/>

Save **Reset**

Figure 29: Customize Report for Grantee Level Assignments screen - Action List

- The screen refreshes and the changes are made. Reports and Roles may be added or removed at any time.

Customize Report for Grantee Level Assignments

Program Name: Restore Act Direct Component
Grantee Name: Bay County Board of County Commissioner [] (2015-----)

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 Job 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"/>	Grant Application Form	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Program Performance Form	<input checked="" type="checkbox"/>

Select Job Type to view default roles:	
<input type="radio"/>	View Only User
<input checked="" type="radio"/>	Data Entry Person
<input type="radio"/>	Authorized Official
<input type="radio"/>	Grant Director

Load/Refresh Action List

Figure 30: Customize Report for Grantee Level Assignments screen

- If no additional changes are necessary, End OLDC.

Lesson 4: Copy Assignments

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

Note: 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’s *Edit Current User* list, search for and select a user to receive roles.
2. Click the **Copy Assignments** button.

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

Roles and Assignments

Current Users: Select an option from the "Search By" drop-down list, enter text in the "Search Users" field, and then select a name

- Click "Edit Assignments" to assign job type, to increase or decrease the Programs, Grantees and/or Grants, to assign reports to (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

- To add an existing GrantSolutions user, click the "Person Search" button. From the following screen, select a name. This name will be used in the "New User" fields. Click "Add User" to complete this process.

Edit Current User

Search By: Last Name ▾

Search Users:

Current Users: Smith, Matt (MSmith)

Edit Assignments Copy Assignments Delete User

Add New User

Name: First: * Middle:

Title:

Street Address 1: Street Address 2:

City: State:

Email: *

Telephone: Ext.

Add User Person Search Refresh

Figure 31: Roles and Assignments screen - Copy Assignments button

3. The “Copy Assignments” screen displays. Search for and choose a user from the *Current Users* list to copy their assignments to the person selected on the previous screen.
4. Click the **Copy Assignments** button.

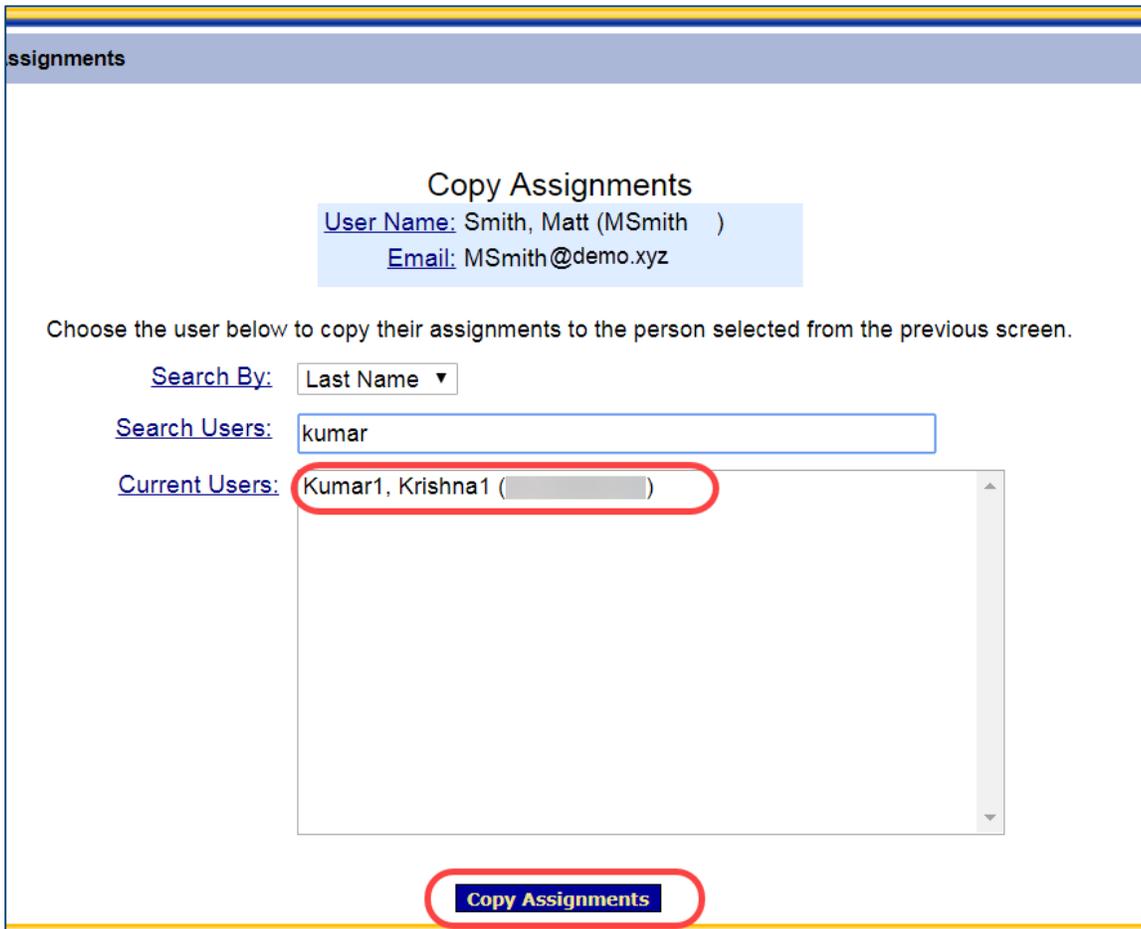


Figure 32: Copy Assignments screen

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

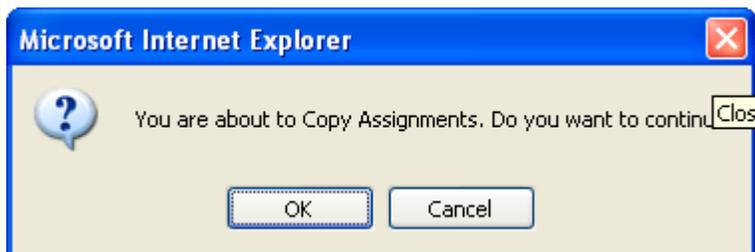


Figure 33: Confirmation Message

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



Figure 34: Copied Assignments Successful message

7. The two users now have the exact same permissions. If the assignments were copied to a new account (no previous GrantSolutions account), the user name and password e-mails would now be sent to the new user.
8. 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.

Roles and Assignments

Current Users: Select an option from the "Search By" drop-down list, enter text in the "Search Users" field, and then select a name

- Click "Edit Assignments" to assign job type, to increase or decrease the Programs, Grantees and/or Grants, to assign reports to (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

- To add an existing GrantSolutions user, click the "Person Search" button. From the following screen, select a name. This name will be added to the "New User" fields. Click "Add User" to complete this process.

Edit Current User

Search By: Last Name ▾

Search Users:

Current Users: Smith, Matt (MSmith)

Users:

Add New User

Name: First: * Middle:

Title:

Street Address 1: Street Address 2:

City: State:

Email: *

Telephone: Ext.

Figure 35: Roles and Assignments screen - Delete User button

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



Figure 36: Warning Pop-up Message

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



Figure 37: Deletion Confirmation Message

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**.

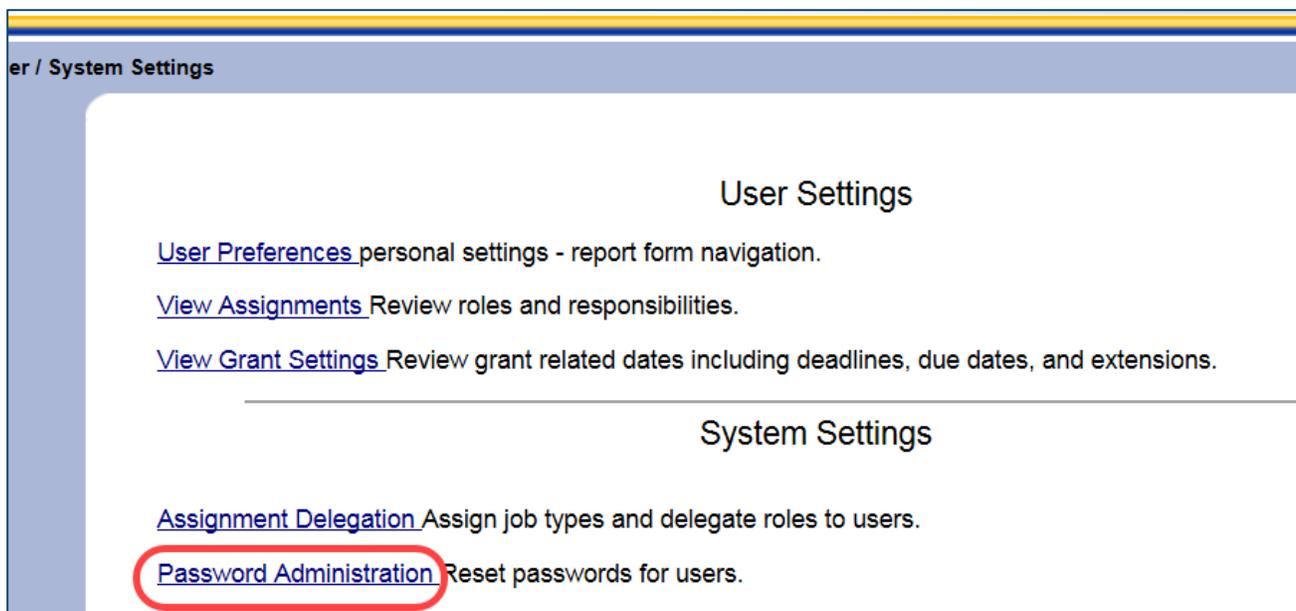
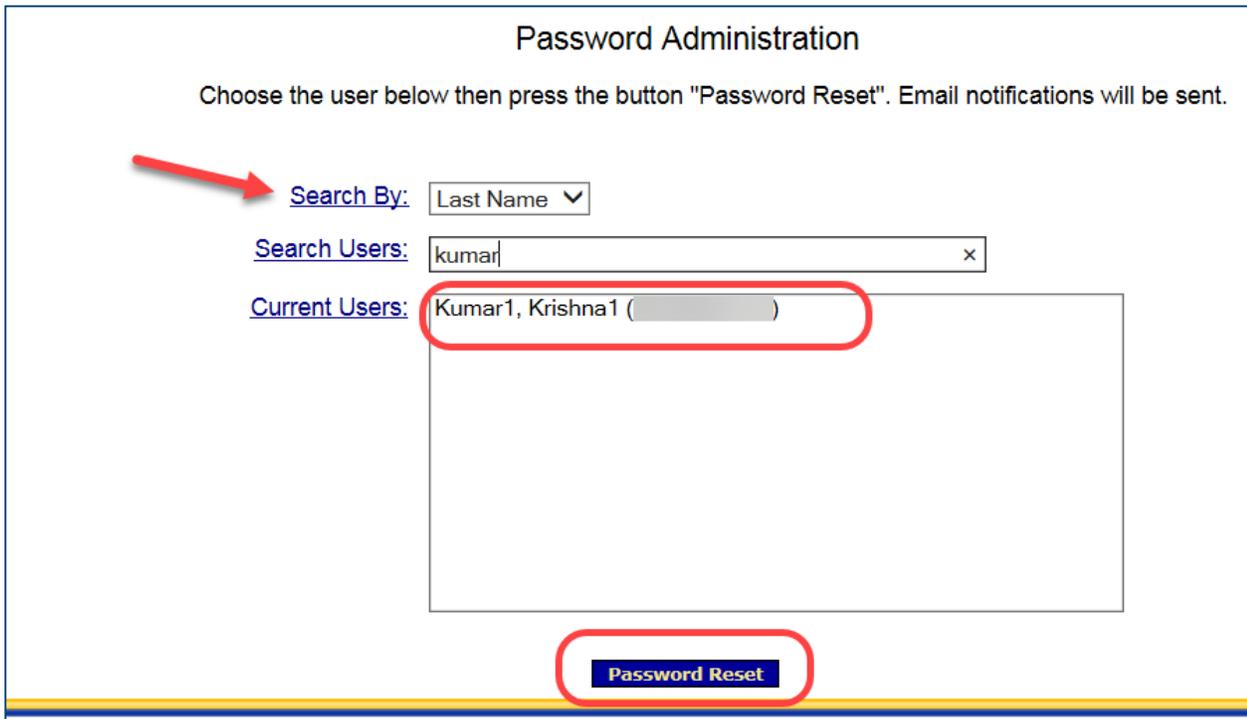


Figure 38: User/System Settings - Password Administration link

3. The “Password Administration” screen displays. Search for the user that needs their password reset, and then select their **name** from the *Current Users* box.
4. Click the **Password Reset** button.



Password Administration

Choose the user below then press the button "Password Reset". Email notifications will be sent.

Search By: Last Name ▾

Search Users: kumar x

Current Users: Kumar1, Krishna1 ()

Password Reset

Figure 39: Password Administration screen

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**.

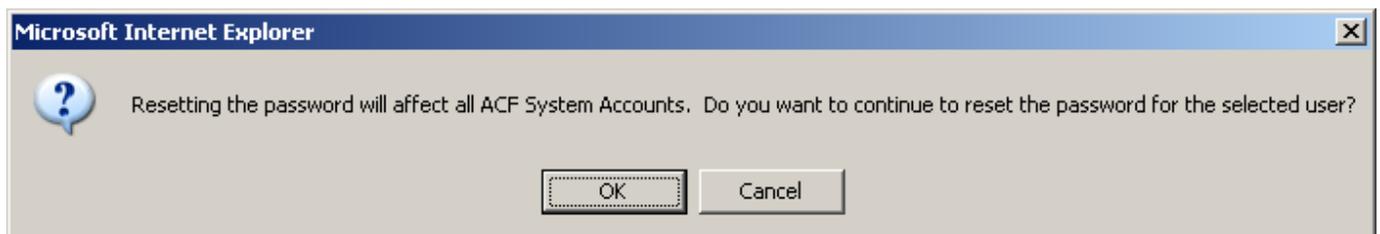


Figure 40: Pop-up warning message

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



Figure 41: Confirmation message

7. The user now receives an e-mail with the new temporary password.

Appendix A: Job Types and Roles

LIST OF JOB TYPES

Grant Partners
<p>Grant Administrator - Person responsible for creating user accounts and assigning roles to Grantee staff. A Grant Administrator can create accounts and assign roles to staff members working with a specific program or grant.</p>
<p>Data Entry Person - Person responsible for entering data into OLDC. The Data Entry Person can create and edit reports by default. Additional roles may be given, including Certify, Submit, and Unsubmit.</p>
<p>Authorized Official – Person directly involved in the processing of the grant. This might be a Financial Officer (FO) in charge of budgeting the grant, or a member of an audit team. An Authorized Official has view-only and Certify roles by default. Additional roles such as Submit may be assigned to the Authorized Official.</p>
<p>Grant Director - Manager of the grant recipient. The default roles are View-only and Certify. The Grant Director may be given other available permissions if more direct control over grants is required.</p>
<p>View-Only – Read and print report forms, but cannot perform any action such as data entry.</p>

LIST OF ROLES

Role	Assignment
Add File Attachments	Adds attachments to a report for submission.
Add New User	Creates new users within the organization to have access to the OLDC system. It also defines the job type and delegate roles.
Add/Edit/Delete 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.
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.

Role	Assignment
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.