

Quick Sheet: Grant Administrator Overview

Audience: Grantees Using the Online Data Collection System (OLDC)

INTRODUCTION

The Online Data Collection (OLDC) system is role-based, which means that permissions for each user are assigned to fit that user's needs. The **grantee user responsible** for assigning roles is the Grant Administrator. A Grant Administrator can assign roles to staff members working with a specific program or grant.

JOB TYPES

There are four other job types under the direction of the Grant Administrator: **Grant Director, Authorized Official, Data Entry Person, and View-Only.**

1. **Grant Director:** Manager of the grant recipient. The default roles are view-only and certify, which means they can only view and electronically sign the form. The Grant Administrator can assign the Grant Director other available permissions if more direct control over grants is required.
2. **Authorized Official:** A person who is directly involved in the processing of the grant. This might be a Financial Officer (FO) who oversees budgeting the grant, or a member of an audit team in the Grant Administrator's office. Like the Grant Director, an Authorized Official has certify and view-only roles by default. A Grant Administrator can assign additional roles to the Authorized Official if necessary.
3. **Data Entry Person:** A person who is responsible for entering data into OLDC. Unlike a Grant Director or Authorized Official, a Data Entry Person can create, edit, and validate forms by default. A Grant Administrator may assign additional roles to the Data Entry Person if necessary.
4. **View-Only:** A person who may only view and print forms, but cannot perform any action such as data entry.

ROLES

Roles permit access to various sections of OLDC and are assigned by a Grant Administrator to staff members responsible for various tasks. All the roles listed below are available to a Grant Administrator by default. If a role listed below is not available, contact the help desk for assistance.

Note: The "Submit", "Unsubmit", and "Revise Submitted Grant Form" roles are not automatically assigned to the job types listed above (except for the Grant Administrator). These roles must be assigned individually to the appropriate user.

Role	Assignment
Add File Attachments	Adds attachments to a form for submission.
Add New User	Creates new users within the organization to have access to the OLDC system. Also assigns the job type and delegates roles.
Certify with Signature Authority	Officially signs a form for submission. This does not submit the form to the grantor. Forms must be certified prior to submission. Users with both Certify and Submit roles must certify a report form before submitting.
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.
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.

Role	Assignment
Help/FAQs	Allows access to the features and functions of the OLDC Help program and Frequently Asked Questions (FAQ) database. Recommended for all users.
Management Status/Remarks	Enables the Report Status History and Remarks section of the Report Form Status page.
Revise Submitted Grant Form	Creates a revision 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.
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 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.