# Introduction to GrantSolutions Online Data Collection

**Grantee Guide**

November 2018

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# Introduction

Grantees use the GrantSolutions Online Data Collection (OLDC) system to enter data, attach documents, validate, certify, submit, and retrieve information pertinent to their forms or reports. This guide provides general instructions for using OLDC, including login and navigation.

**Important!** Although this guide contains several SF-424M screen images, they are used for example purposes only. For instructions on completing and submitting the SF-424M, please refer to the guide "Submit the SF-424M in the GrantSolutions Online Data Collection (OLDC) System."

REQUEST FOR OLDC ACCESS

Each person that uses GrantSolutions OLDC must have their own account. To request a new account or to modify an existing account, please submit the Request for OLDC Access form to your **ACF Regional Grants Office** point of contact.

https://www.acf.hhs.gov/sites/default/files/ofa/request_access_oldc.pdf

The first page of the *Request for OLDC Access* form contains instructions and Job Type/Role descriptions. The second page contains the form to complete.

When new accounts are created, the user receives two emails from GrantSolutions. The first email contains the username and the second contains the new "temporary" password. When logging into GrantSolutions for the first time, users are prompted to change their password for security purposes.

## Login

To log into GrantSolutions OLDC, complete the following steps:

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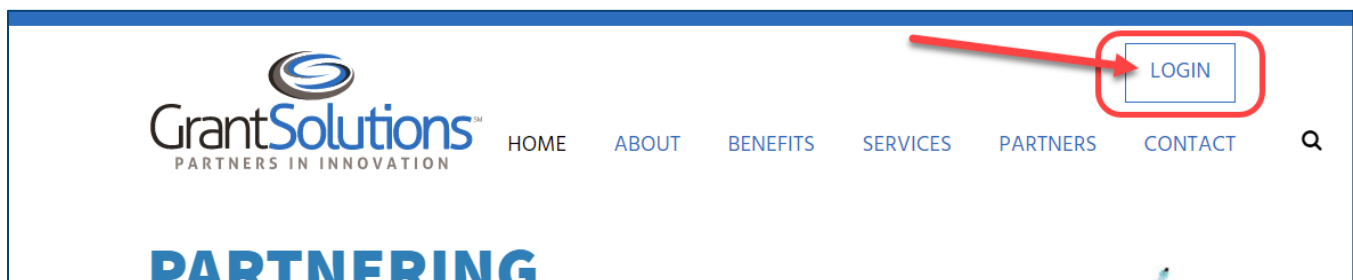


**Figure 2: The GrantSolutions Home page**

**Tip**: For easier access in the future, add GrantSolutions (www.grantsolutions.gov) to your browser's favorites/bookmarks.

3. The GrantSolutions login screen displays. Enter your **username** in the *Username* field and your **password** in the *Password* field. Click the **LOGIN** button.
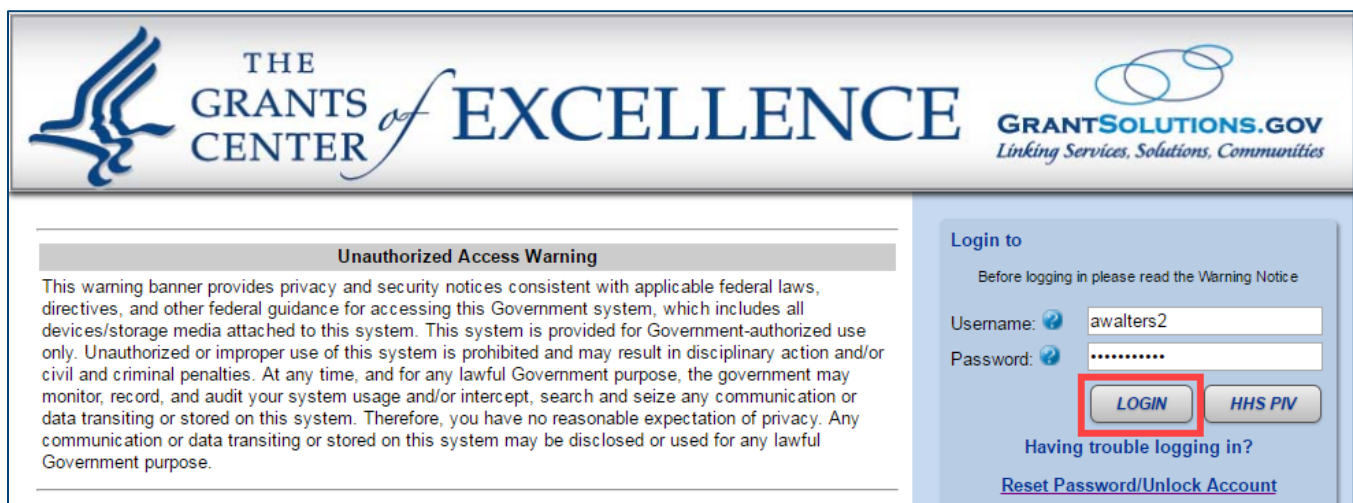


**Figure 3: GrantSolutions login screen - Username field, Password field, and LOGIN button**

The first time a Grantee logs into GrantSolutions, they are presented with the GrantSolutions Enhanced Security Option message. Click **Yes** to turn on two-factor authentication or click **No** to continue without enabling the feature.



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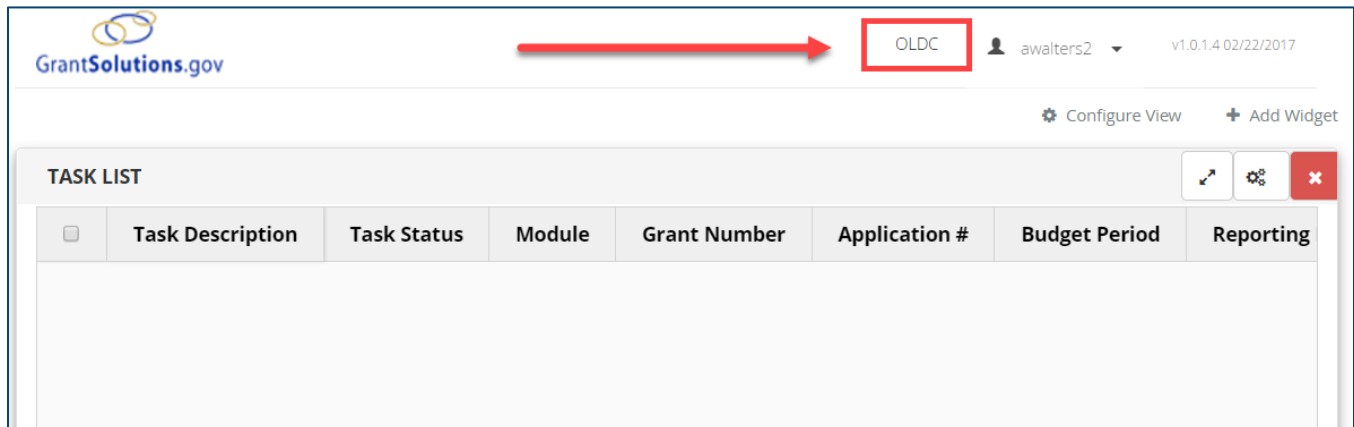


Figure 4: GrantSolutions "Portal" screen - OLDC menu

*Note: Some users may need to select **Post Award Monitoring – OLDC** from the Portal menu.*

5. The Online Data Collection "Home" page appears.



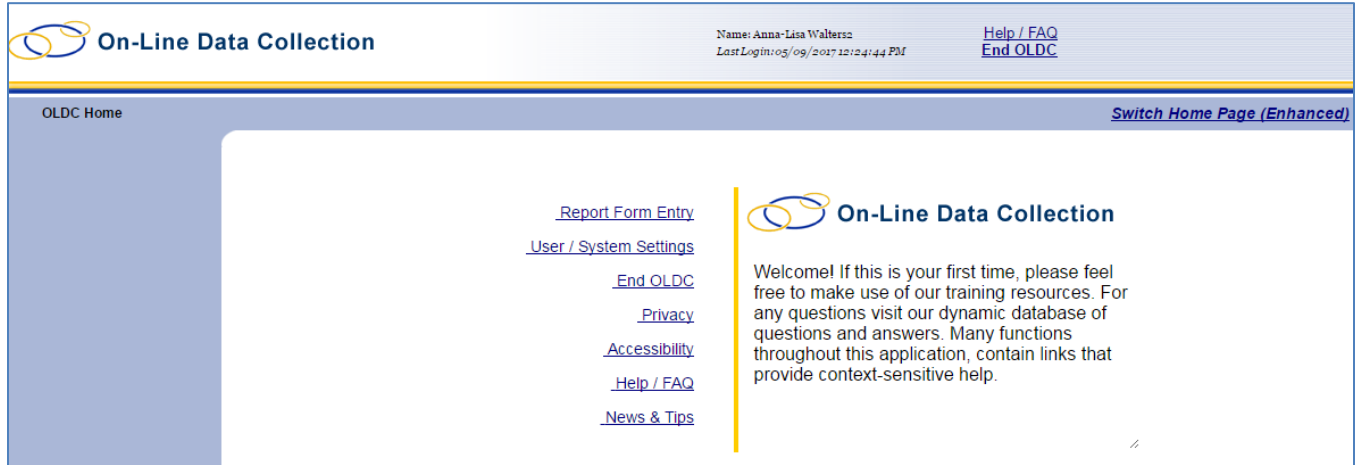**Figure 5: Online Data Collection "Home" page**

# Navigation

The OLDC menu list is available from the "Home" screen. The menu list contains useful links, some of which are detailed below:

- **Report Form Entry**: Access reports and forms
- **User/System Settings**: View assigned permissions and personal settings
- **End OLDC**: Close OLDC
- **News and Tips**: Access general and program specific OLDC documentation
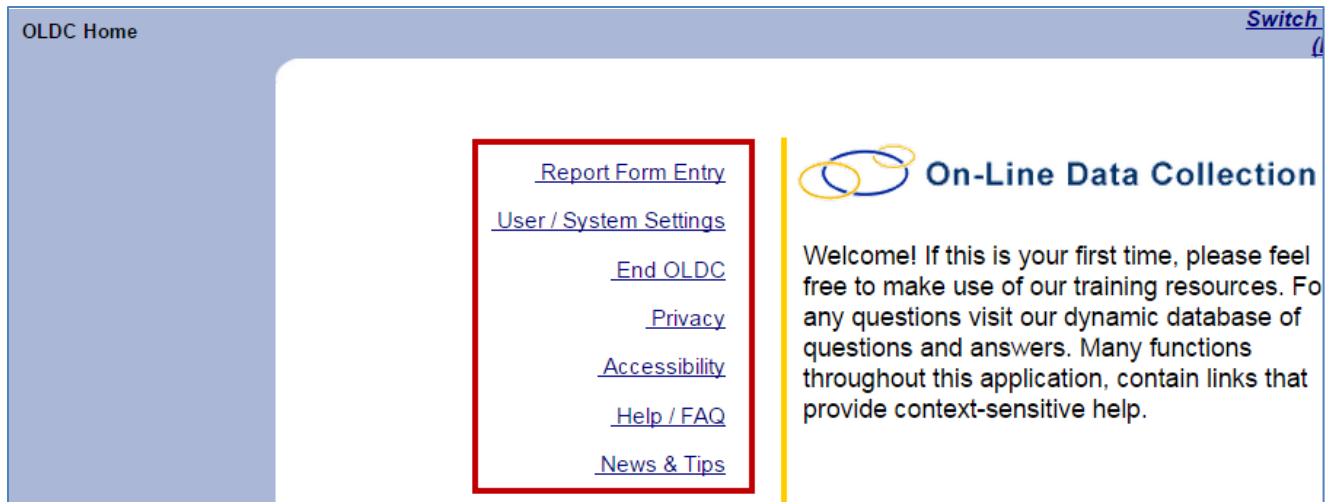
**Figure 6: Home screen**

Navigation links appear and disappear towards the top of each screen as different pages are accessed. Click any of the Navigation links (breadcrumbs) to return to previously visited screens. For security purposes, do not use the back button.
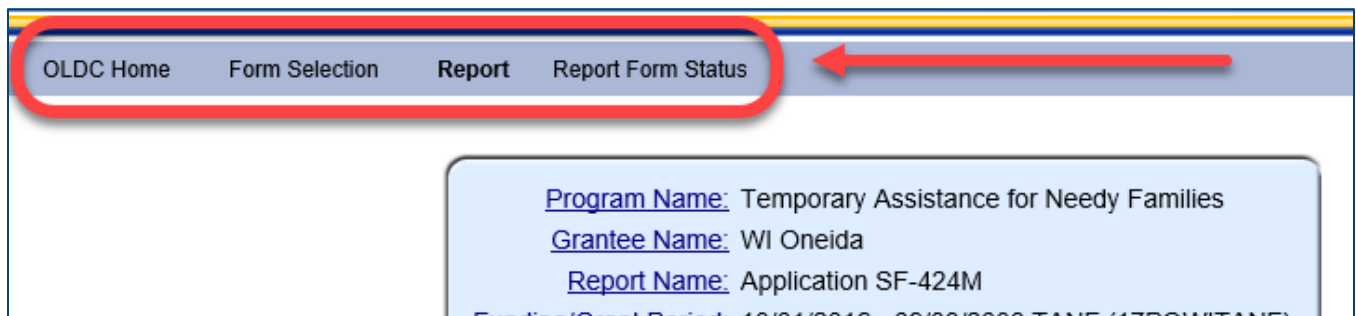


**Figure 7: Navigation links**

ENHANCED HOME PAGE

Switch to the enhanced Home page to improve navigation while retaining access to the menu list. The enhanced Home page contains three tabs: **My Recent Activity**, **Activity Report**, and **Report Due**. Use these tabs to quickly and easily access forms.

To activate the enhanced "Home" page:

1. From the right side of the "Home" screen, click the link **Switch Home Page (Enhanced)**.
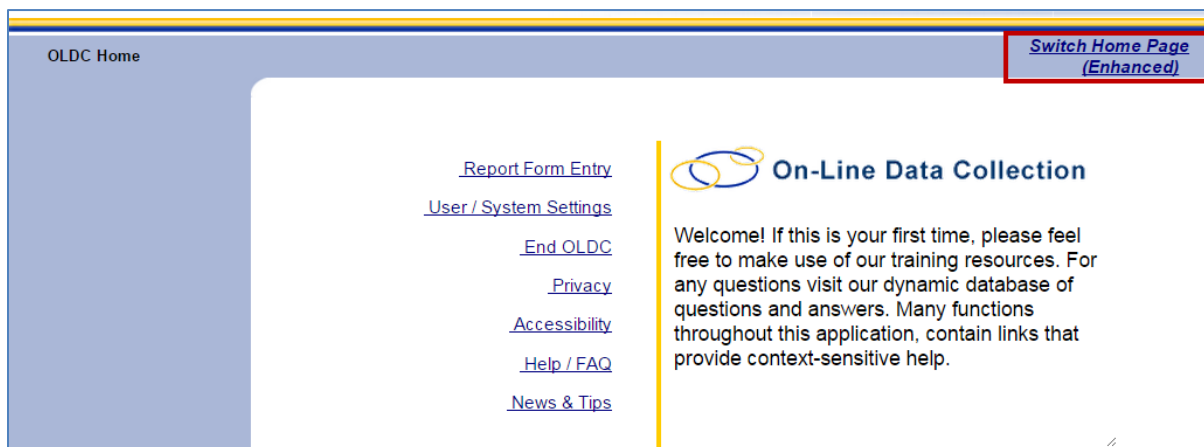


Figure 8: OLDC Home - Switch Home Page (Enhanced) link

2. A message may appear asking "Do you want to keep the enhanced OLDC home page as your default home page?"

   - Click **Yes** to set the enhanced page as the default each time OLDC is opened.

   - Click **No** to enable the enhanced home page now. However, the next time OLDC is opened, the regular Home screen appears.
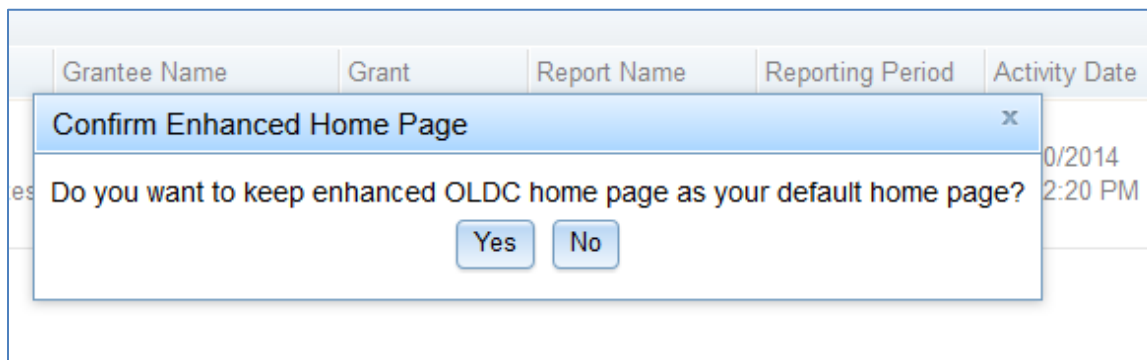


Figure 9: Confirmation Pop-up Message

3. The enhanced "Home" screen appears.



**Figure 10: OLDC Enhanced Home page**

4. Return to the regular view at any time by clicking the link **Switch Home Page (Regular)**.
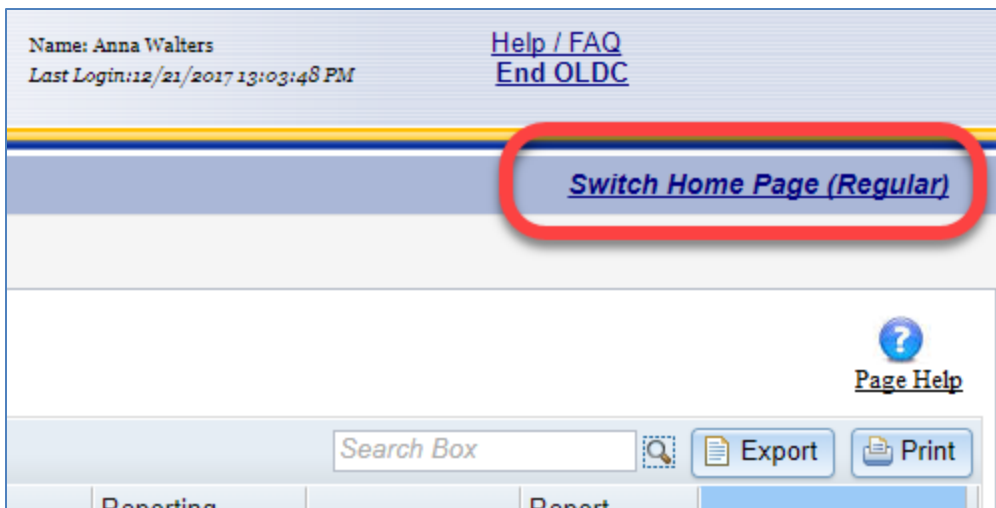


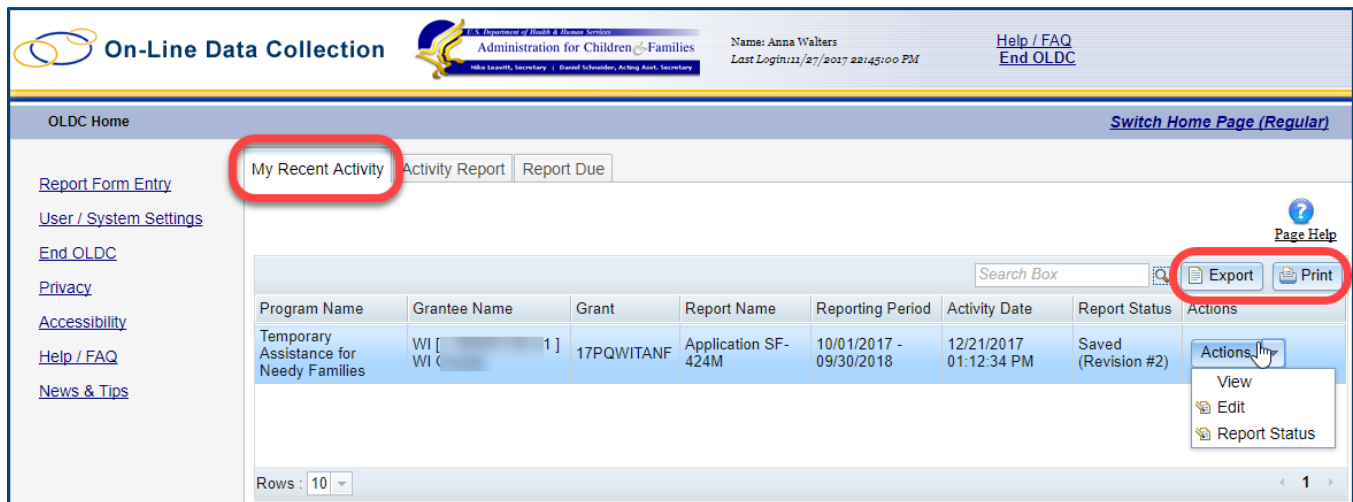**Figure 11: Enhanced OLDC Home screen - Switch Home Page (Regular) link**

## My Recent Activity

The "My Recent Activity" tab displays a list of forms in which the user has recently taken an action, such as save, validate, certify, or submit.

To access a form, click the **Actions** drop-down list and select one of the following options:

- **View**: Open a view-only version of the form

- **Edit**: Access a form for editing

- **Revise**: Create an exact copy of the submitted form where the data fields are open and modifications can be made

- **Report Status**: Open the "Report Form Status" page

*Note: Available actions depend on the user's permissions and the status of the form.*
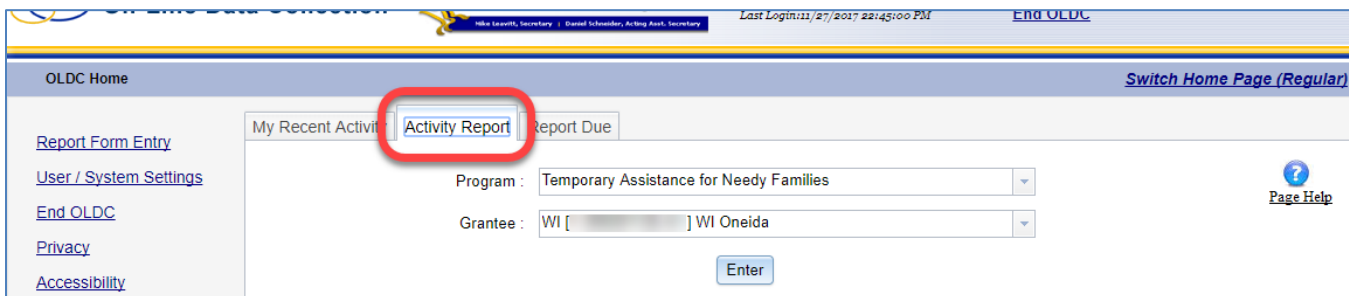


**Figure 12: My Recent Activity Tab**

Additionally, click the **Export** button to save the list of recently used forms to Excel, or click **Print** to print in a nice format. The Print and Export buttons are available from all three tabs.

## Activity Report

Use the "Activity Report" tab to search for forms in progress or submitted over the past two years. To access historical data, use the *Report Form Entry* link from the menu list. To search for forms (if not already pre-selected):

1. Select a **Program** from the *Program* drop-down list.

2. Select a **Grantee** from the *Grantee* drop-down list.

3. Click the **Enter** button.
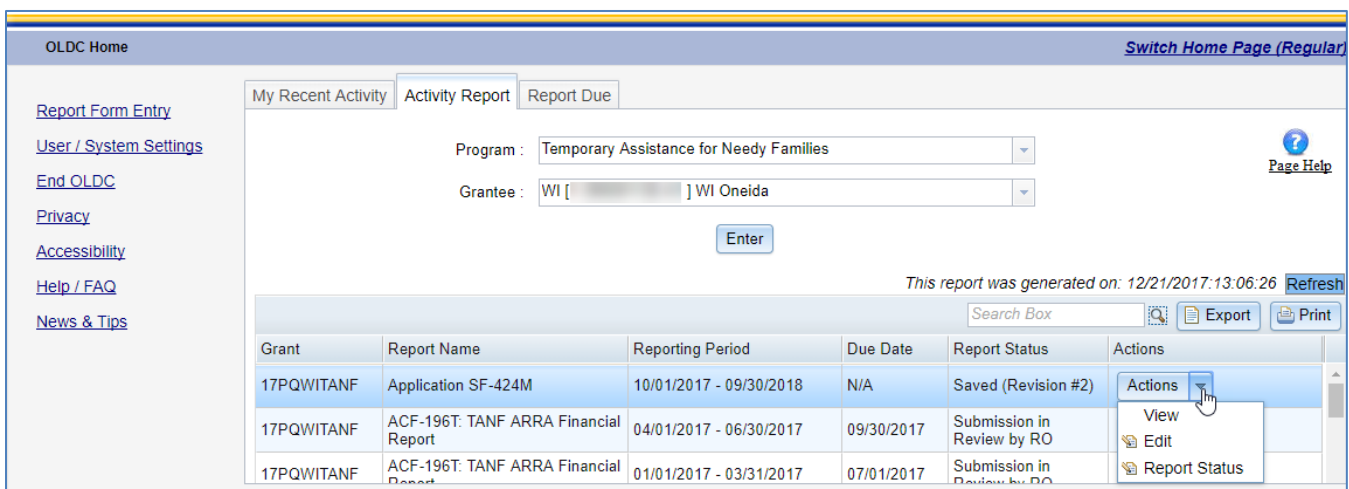


**Figure 13: Activity Report Search**

4. The Results table appears. Click the **Actions** drop-down list and select one of the following options:

- **View**: Open a view-only version of the form

- **Edit**: Access a form for editing

- **Revise**: Create a copy of the submitted form where the data fields are open and changes can be made

- **Report Status**: Open the "Report Form Status" page



**Figure 14: Activity Report Tab**

## Report Due Tab

Use the "Report Due" tab to access forms that are currently available for submission. Once a form is submitted, it is removed from this tab but can still be accessed from the *My Recent Activity* and *Activity Report* tabs, or from the *Report Form Entry* menu.

Forms are available from this tab going back two years from the current date. To access reports that were due over two years ago, use the *Report Form Entry* link from the menu list.

To search for reports or forms:

1.  Select a **Program** from the *Program* drop-down list.

2.  Select a **Grantee** from the *Grantee* drop-down list.

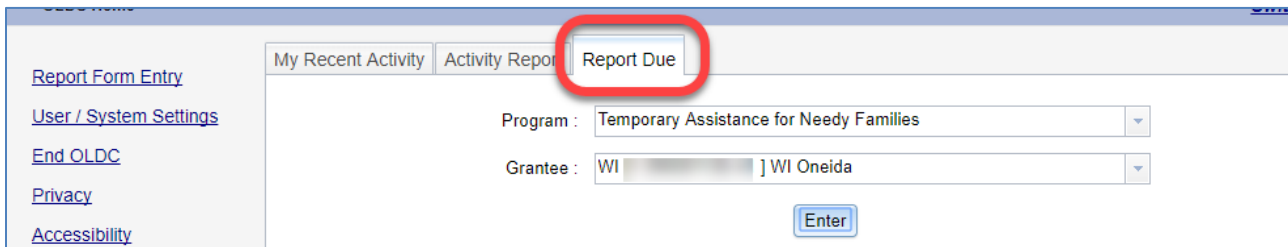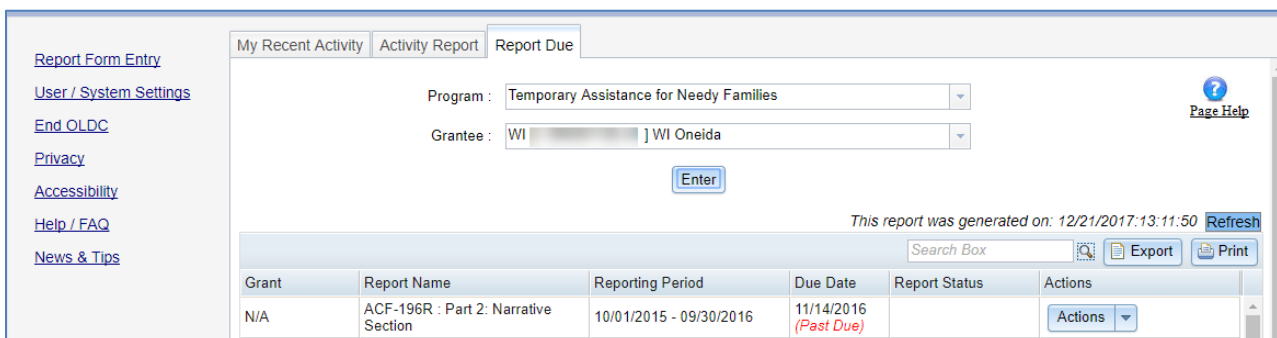3.  Click the **Enter** button.



**Figure 15: Report Due tab**

4.  The Results table appears. Click the **Actions** drop-down list and select one of the following options:

- **View**: Open a read-only version of the form
- **Create**: Start a new form and begin editing
- **Edit**: Access a form for editing
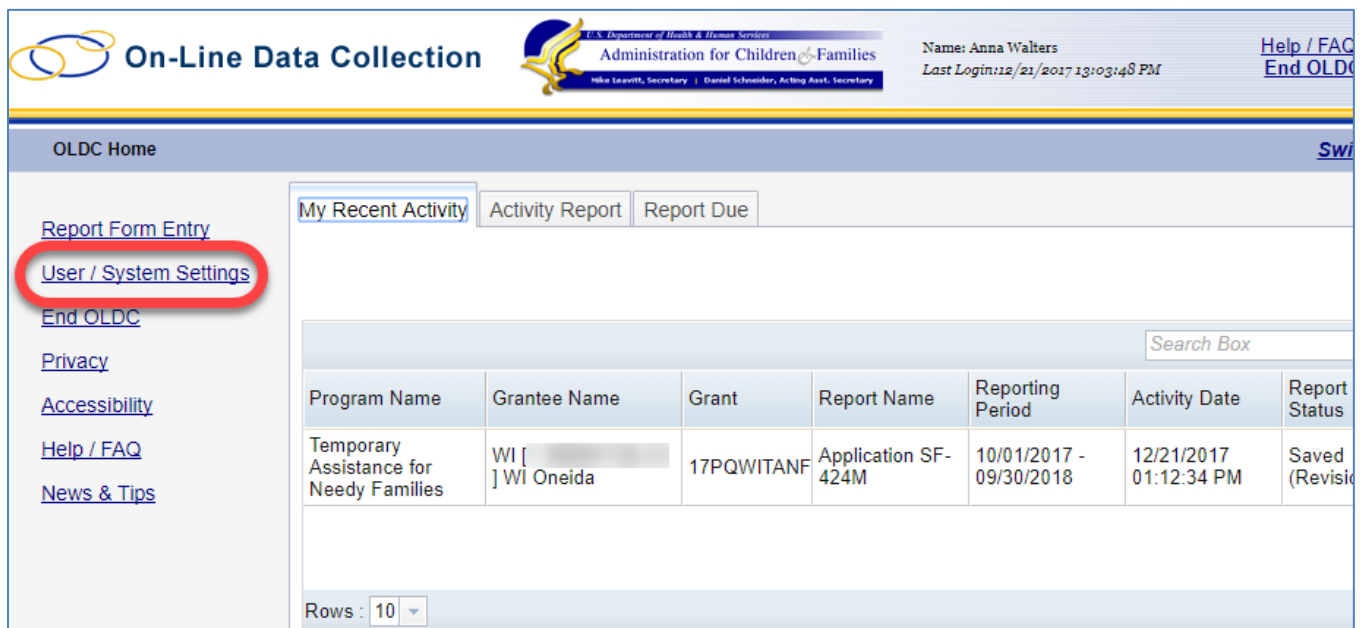- **Report Status**: Navigate to the "Report Form Status" page



**Figure 16: Report Due Results table**

# Verify Existing Permissions

Each user can view their own OLDC permissions. This is especially helpful in determining if a specific permission, such as **_Revise Submitted Grant Form_** which enables a user to create a revision once a form is submitted, is assigned.

To verify one's own permissions in OLDC:

1. From the menu list, select **User/System Settings**.



**Figure 17: Menu List - User/System Settings**

2. The "User Settings" screen appears. Click the link **View Assignments**.
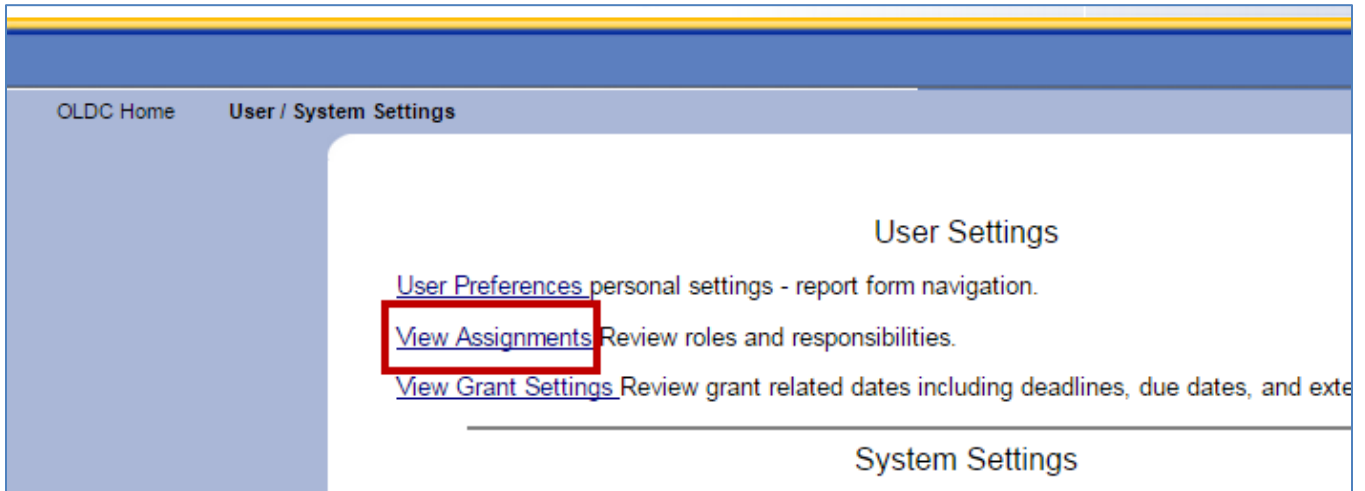


**Figure 18: User Settings - View Assignments**

3. The "Program & Grantee Selection" screen appears.

   Select a **Program** from the drop-down list.

4. Select the **Grantee name** (i.e. Grantee organization/Tribe name) from the *Grantee* drop-down list.
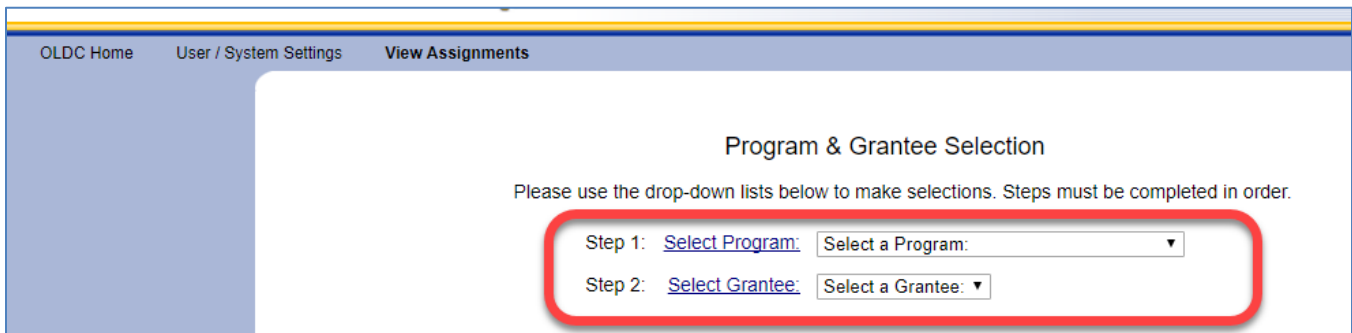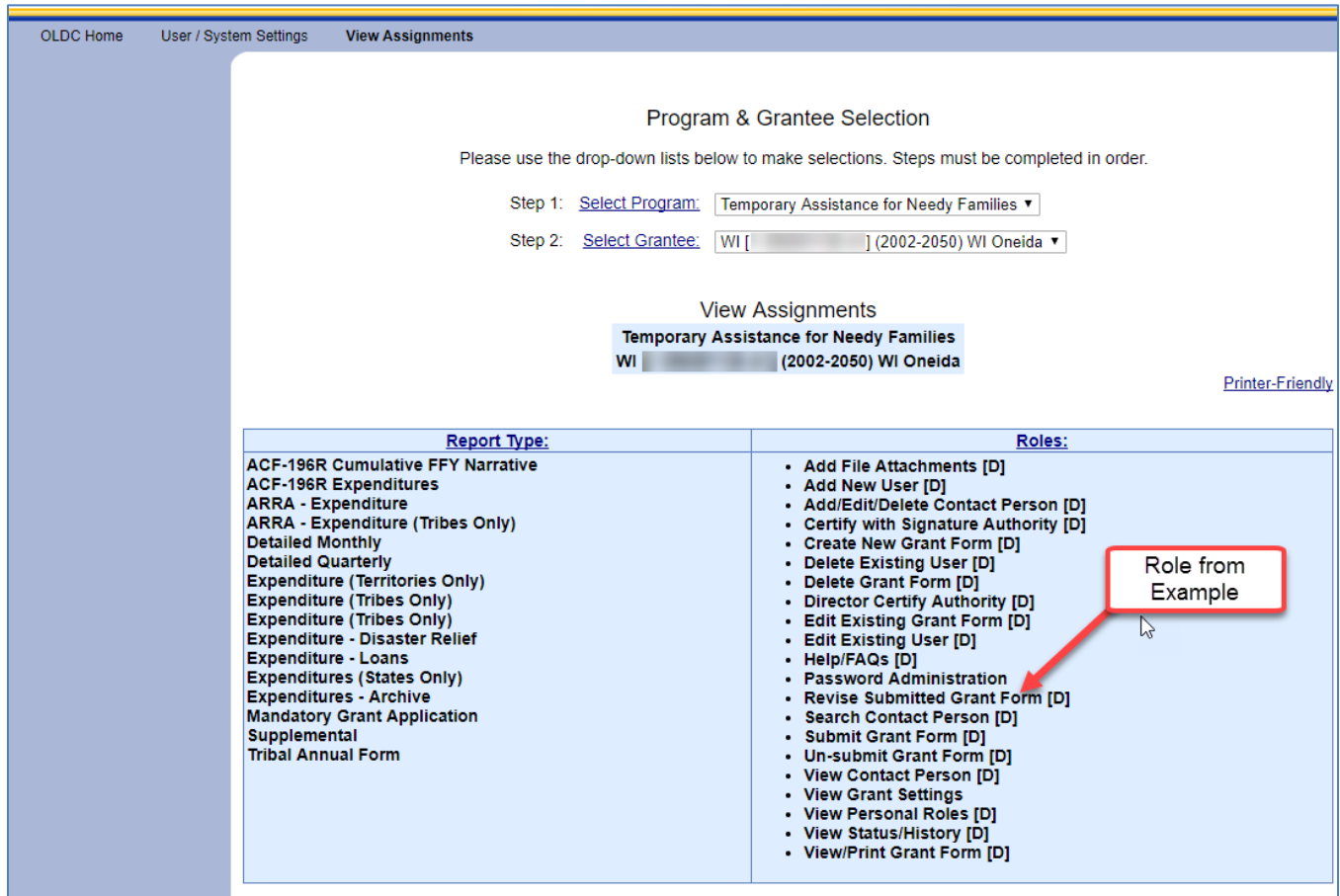


**Figure 19: Program & Grantee Selection screen**

5.  The screen refreshes and all assigned reports and roles are listed in *the View Assignments* section for the selected program.



**Figure 20: View Assignments table**

**Tip**: If you are missing a role needed to perform an action, please contact the GrantSolutions Help Desk for assistance. help@grantsolutions.gov | 866-577-0771

6. To print the list of assignments, click the **Printer Friendly** link.



**Figure 21: View Assignments - Printer-Friendly link**

7. A printable version of the list appears in a new window. Select the **print** option from the browser's menu. When done, click the **X** in the upper right corner to close the window.
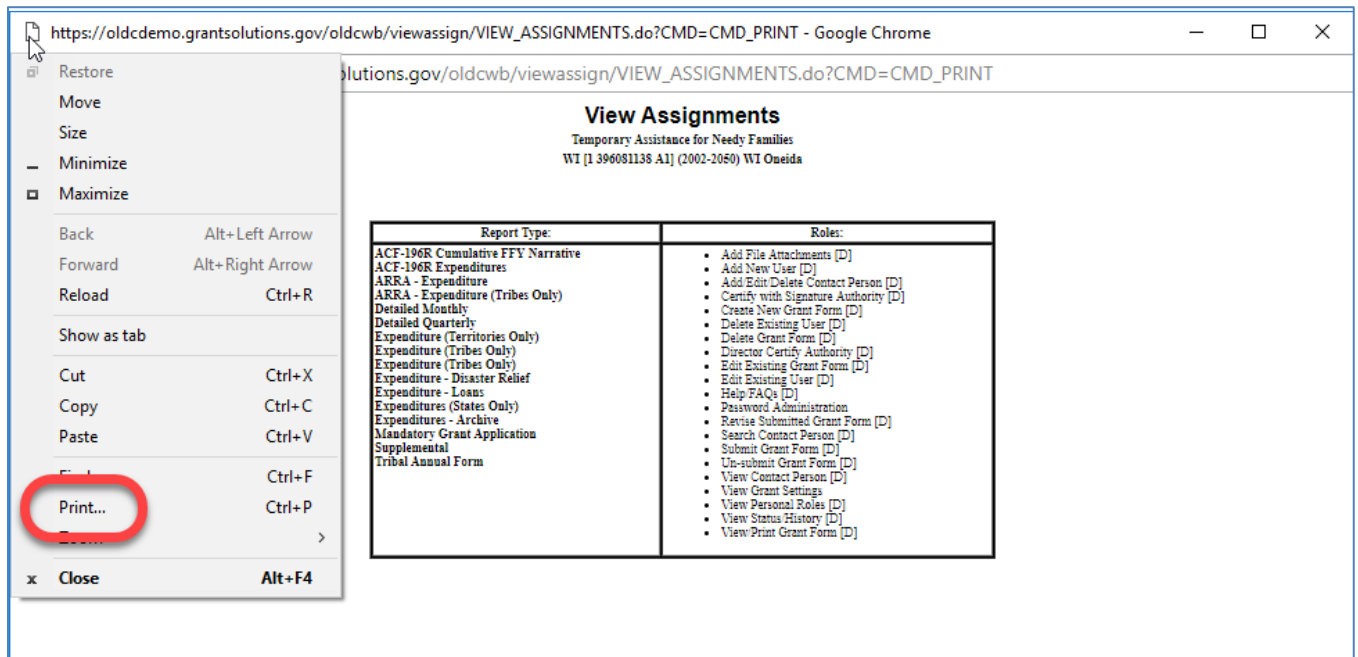


**Figure 22: View Assignments - Printer Friendly Version**

*Note: The location of the print menu varies by browser.*

# Access a Form from the Report Form Entry Menu

To access a form from the *Report Form Entry* menu, complete the following steps:

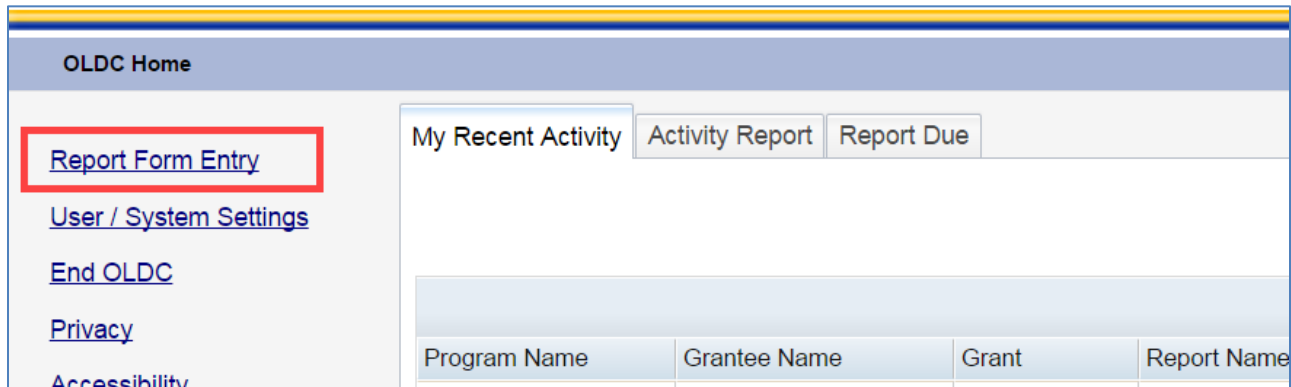1. From the OLDC Home menu list, select **Report Form Entry**.



**Figure 23: Home page - Report Form Entry link**

2. The "Form Selection" screen appears. Under Step 1, use the drop-down list to select the **Program Name**.

3. Under Step 2, use the drop-down list to select the **Grantee Name** (Grantee organization).

4. Under Step 3, use the drop-down list to select the **Report (Form) Name**.
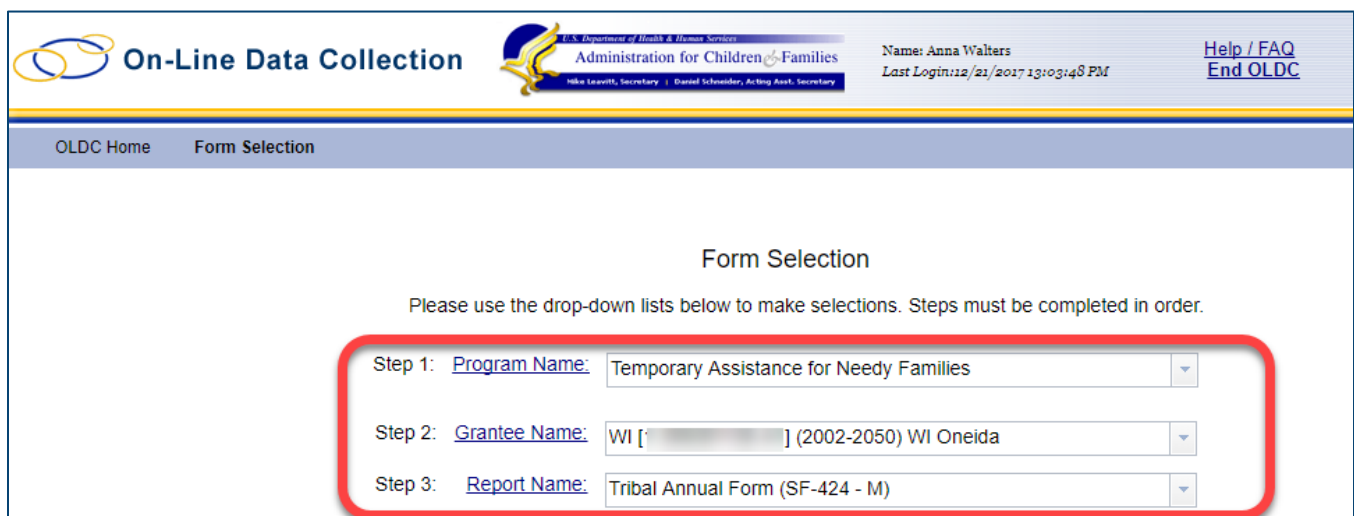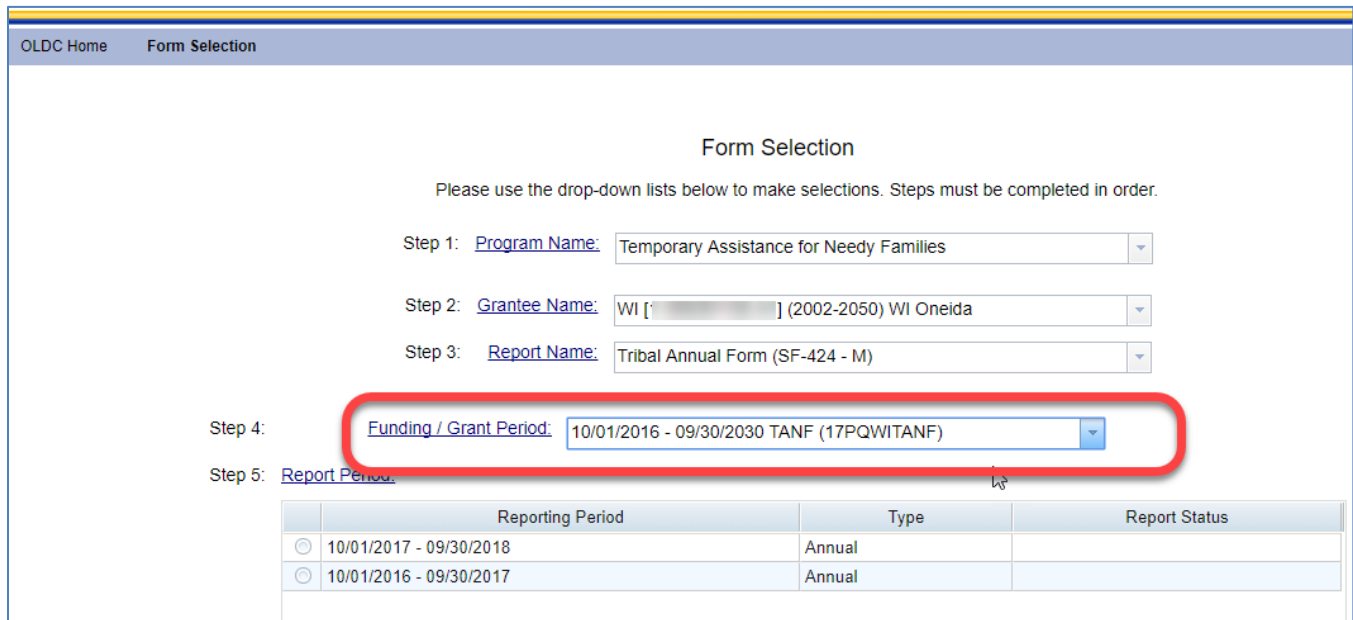


**Figure 24: Form Selection screen – steps 1 to 3**

5. The screen refreshes and steps 4 – 6 appear. Under Step 4, use the drop-down list to select the **Funding/Grant Period**.

*Note: Different forms may require fewer or more steps. The steps are based on the Program and Form selection.*
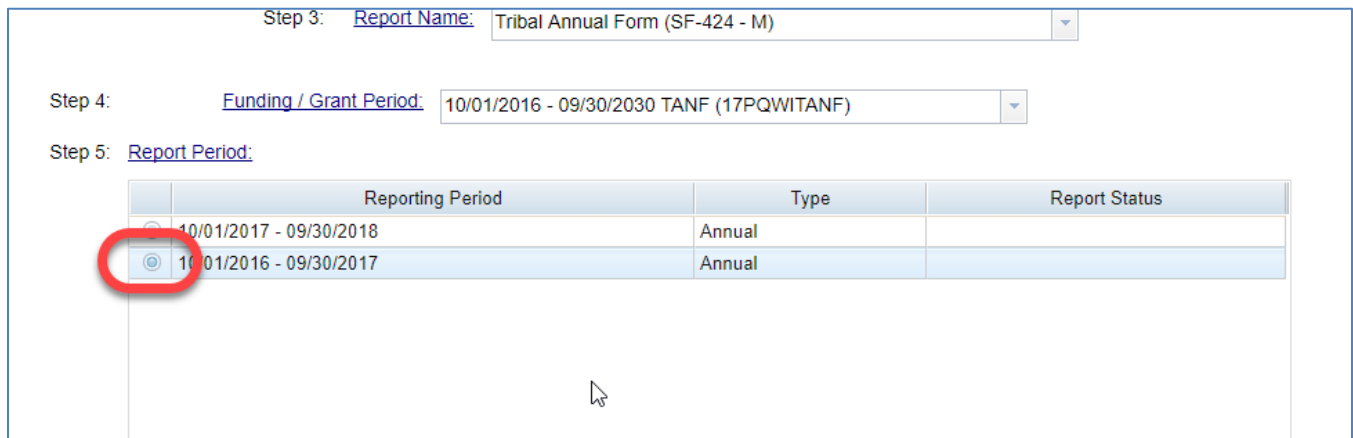


**Figure 25: Form Selection screen – step 4**

6. Under Step 5, use the drop-down list to select the **Report Period**.



**Figure 26: Form Selection screen – step 5**

7. Under Step 6, select the action **New/Edit/Revise Report** from the drop-down list.

8. Click the **Enter** button.



**Figure 27: Form Selection screen - Step 6 and the Enter button**

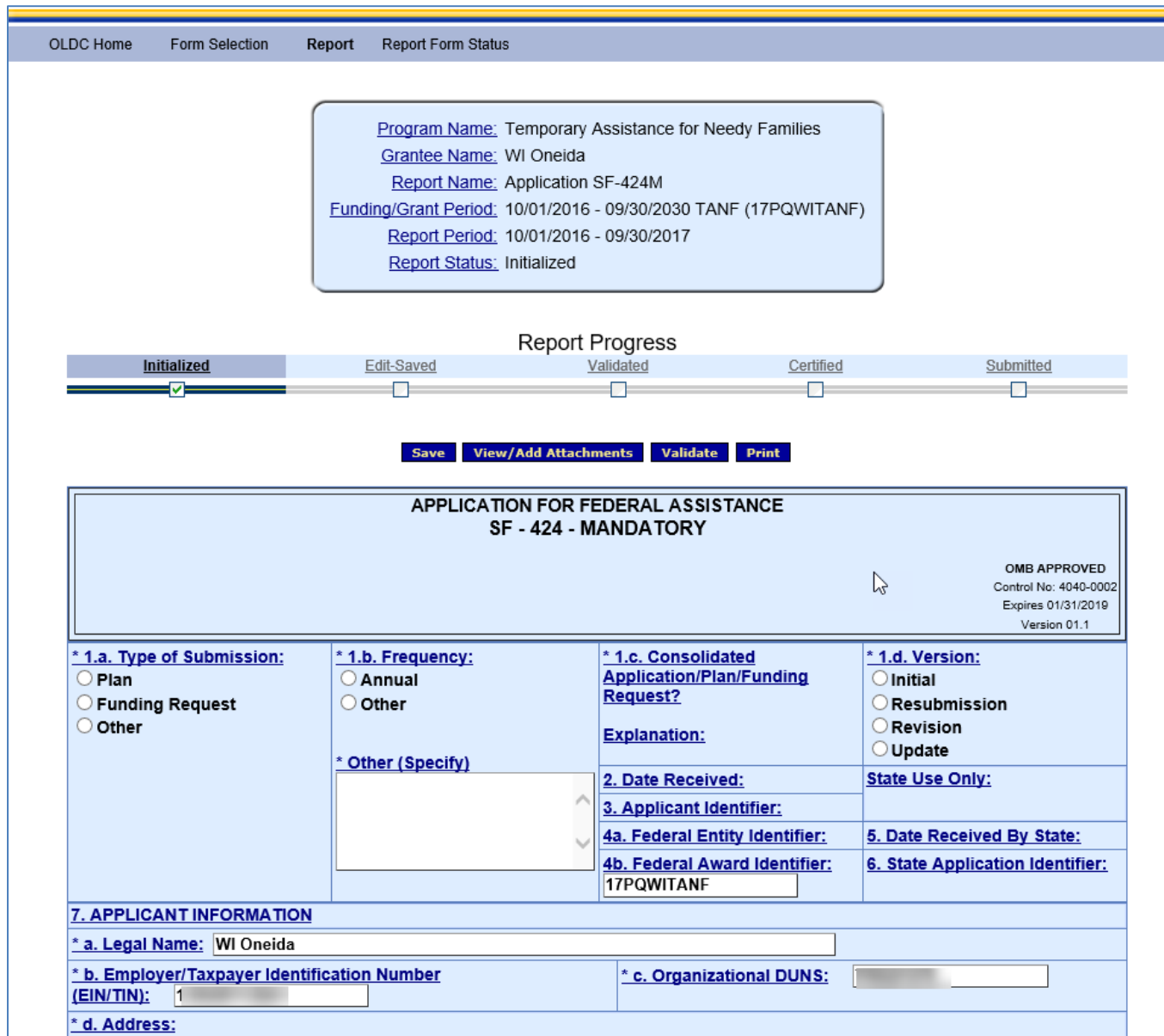Tip: The selections from the *Action* drop-down list are:

- **New/Edit/Revise**: Initialize (start) a new report, edit an existing report, or create a revision for a completed report that is already submitted.
- **View/Print/Status/Approve Report**: Navigate to the "Report Form Status" page where the report can be viewed, printed, and the report history is visible.
- **Print Latest Version (HTML)**: Open a printable version of the report in the browser window. Use the browser print option.
- **View Latest Report**: View a read-only version of the latest report.



**Figure 28: Available Actions**

9. The "Report" screen appears.



**Figure 29: Report screen**

**Tip:** Save often. A timeout warning message appears after 25 minutes of inactivity. Activity includes clicking any of the actions buttons (e.g. Save, Validate, Certify, and Submit) or navigating to another screen. Entering data and clicking help links are not considered actions. When the timeout warning message appears, click the **OK** button to continue working and restart the clock for another 25 minutes.

## Report Screen

The "Report" screen is divided into four parts: Information Box, Progress Bar, Action Buttons, and Data Entry.

The **Information box** includes all the selections used to create the report. The status is *Initialized* until the report is saved.

The **Report Progress bar** is a useful tool for visually representing the status of the report. The Progress bar displays the steps that are already finished as well as the steps that need to be taken to complete the process.

The Grantee process includes the following statuses/actions:

- Initialized
- Edit-Saved
- Validated
- Certified
- Submitted
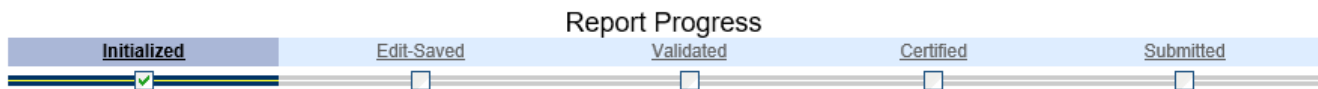


**Figure 32: Report Progress Bar**

**Action buttons** are located below the Information box and Report Progress bar. Users with data entry capabilities can Save, View/Add Attachments, Validate, and Print depending on the report's status.

Action buttons are also available towards the bottom of the screen.



**Figure 33: Action buttons**

Some fields are pre-populated from the grants system.



**Figure 34: Report screen - Cover Page**

Enter data in open fields.



**Figure 35: Report screen**

# Report Form Status Page

The "Report Form Status" page is an excellent resource for following a report's progress. From the Status page, easily check the form status, attachments, revision history, and contact information.

The Report Form Status page can be accessed in three ways:

Option 1: Select the action **Report Status** from a tab on the enhanced Home page.
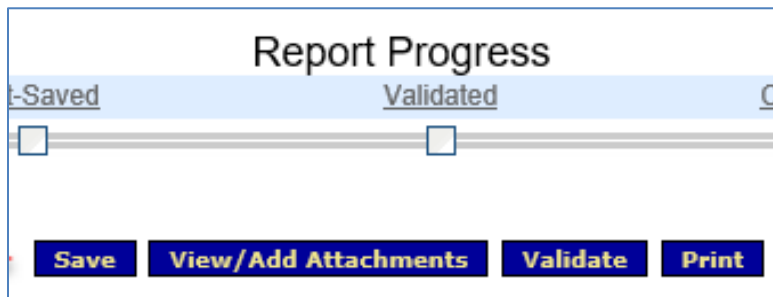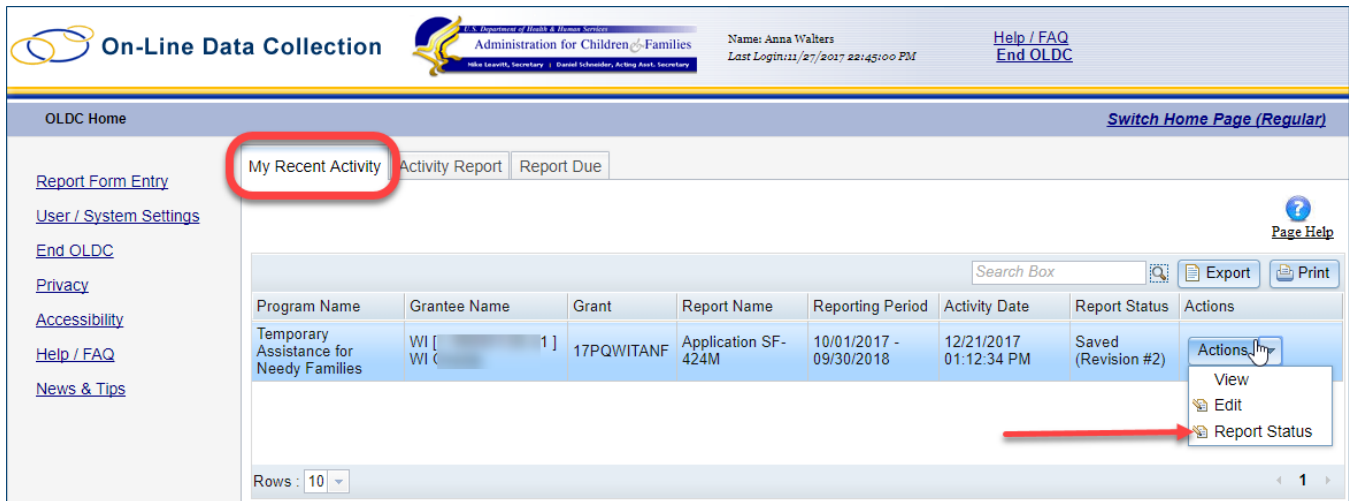


**Figure 36: Enhanced Home page - Report Status drop-down**

Option 2: From the "Form Selection" screen *Action* drop-down list, select **View/Print/Status/Approve Report** and then click the **Enter** button.
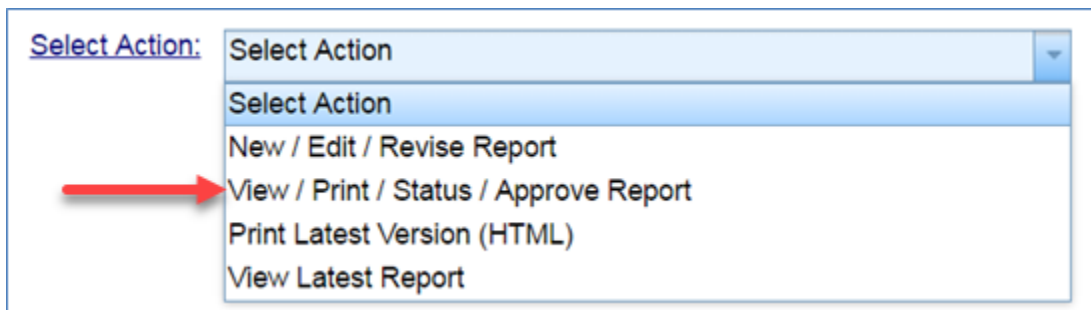


**Figure 37: Form Selection screen Select Action drop-down list - View/Print/Status/Approve Report**

**Option 3:** From the "Report" screen, select the **Report Form Status** navigation link.



## Report Form Status Table

The *Report Form Status* table contains the following columns:

- **Report Submissions:** Depending on a form's status, *Report Submissions* allows a user to either view submitted reports or edit forms in progress.
- **Report Status:** Tracks the steps a form has taken within OLDC. For example, a new form displays an "Initialized" status. After a form is saved, the status changes to "Saved".
- **Status Date:** The last time a change was made to the form.
- **Report Action:** The *Action* a user can perform depends on the status of the form and the user's permissions. For example, a Certified report can be Submitted from the Status page.
- **Print:** Allows the user to view or print the report in HTML (printer friendly from browser) format. Once the form is submitted, the print as PDF with Attachments is also available.



**Figure 38: Report Form Status Page - Report Form Status table**

## History

The Status page contains the history of the form, such as the name of the person who validated the form and the date and time the action was taken.

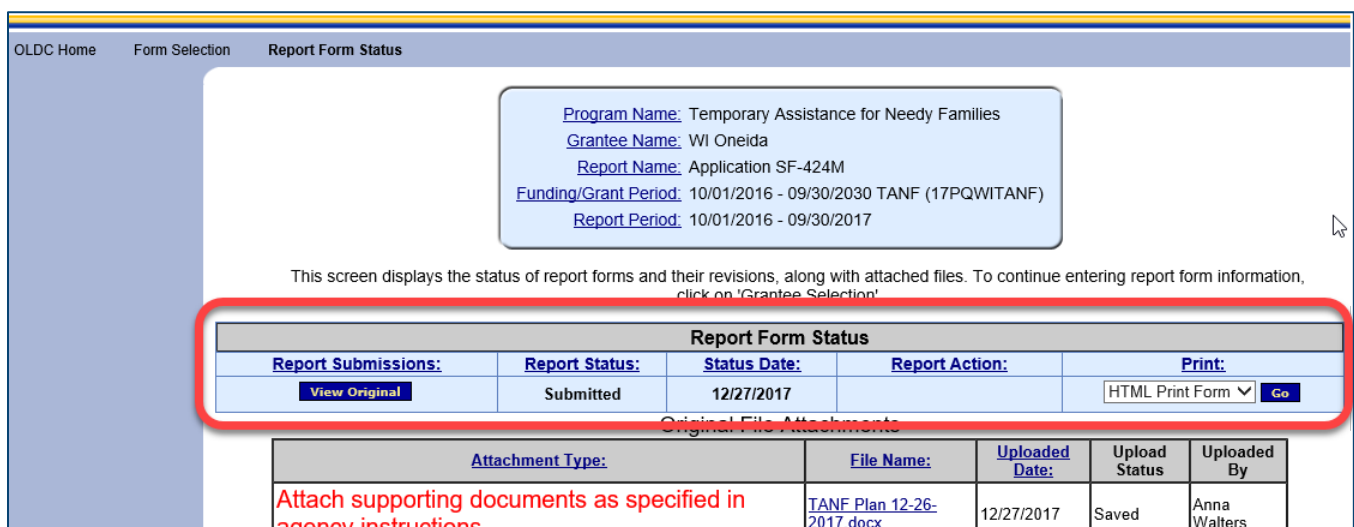| Report Submissions: | Report Action: | Date/Time: | User Name: | Change (if known): |
|---|---|---|---|---|
| Original | Submitted | 12/26/2017 04:17:35 PM | Anna Walters | |
| Original | Certified | 12/26/2017 04:14:04 PM | Anna Walters | Signed as Authorized Official |
| Original | Saved -- Validated | 12/26/2017 04:07:05 PM | Anna Walters | |
| Original | Saved | 12/26/2017 03:59:54 PM | Anna Walters | |
| Original | Validated - with Warnings | 12/26/2017 03:55:58 PM | Anna Walters | |
| Original | Saved -- with Errors | 12/26/2017 03:55:34 PM | Anna Walters | |
| Original | Saved -- with Errors | 12/26/2017 03:55:04 PM | Anna Walters | |
| Original | Saved | 12/26/2017 03:54:49 PM | Anna Walters | |
| Original | Saved | 12/26/2017 03:54:41 PM | Anna Walters | |
| Original | Saved -- with Errors | 12/26/2017 03:51:56 PM | Anna Walters | |

Report Status History — Show 10 entries — Search: — Showing 1 to 10 of 11 entries — Previous 1 2 Next

**Figure 39: Report Form Status Page - History**

## Contacts

A list of primary contact names, phone numbers, and e-mail addresses are listed under *Contacts* on the Status page.

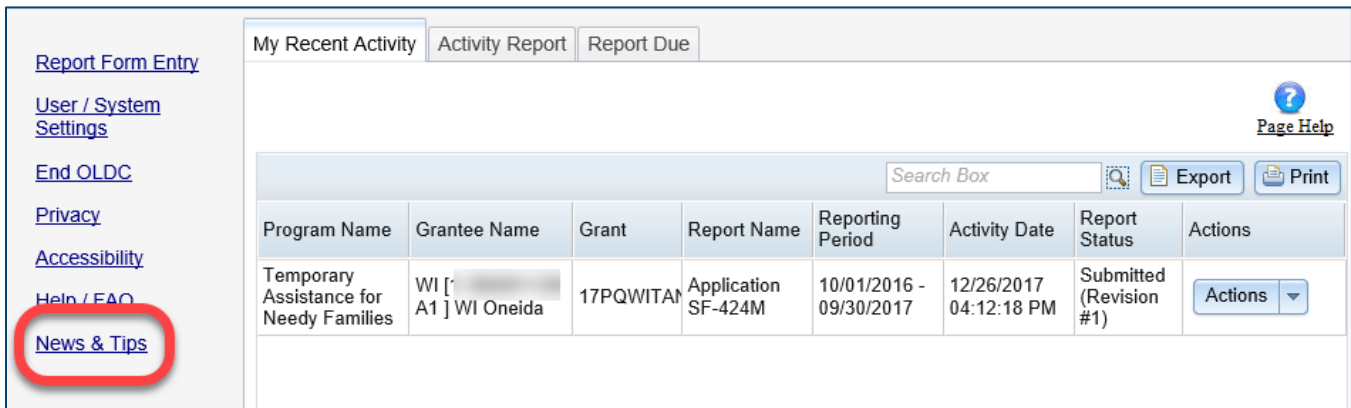| Contact Name: | Telephone #: | E-mail: |
|---|---|---|
| John Smith | (202) 555-1212 | jsmith@email.com |
| Mary Jones | Not Available | mjones@email.com |
| Mike Dough | (202) 555-1212 | mdough@email.com |

**Figure 40: Report Form Status Page – Contacts**

# Resources and Support

DOCUMENTATION RESOURCES

Documentation resources are available from the "OLDC Home" page by clicking **News & Tips** from the Menu list.



**Figure 41: OLDC Home screen with the New & Tips link**

The "Online Data Collection Resources" site appears in a new window.



**Figure 42: Online Data Collection Resources site**

This resources site contains links to the following information:

- **Release Notes**: Documents used to communicate enhancements and new features in OLDC. They are posted whenever there is a new OLDC version.

- **User Guides**: Detailed information for using OLDC.

- **Quick Sheets**: Brief and easy to follow instructions on targeted processes. These job aids are useful as quick starts and refresher documents.

- **Program Specific Documentation**: Tutorials, quick sheets, guides, and other documents customized for a Program Office. This **document** for TANF Tribal Grantees is available from the Program Specific Documentation page.

- **Frequently Asked Questions**: Links to the GrantSolutions FAQ page. Find useful information on questions such as how to reset a password.

GRANTSOLUTIONS PARTNER SUPPORT CENTER

The GrantSolutions Partner Support Center is available to provide technical GrantSolutions assistance. Support team personnel are available Monday through Friday 7 a.m. to 8 p.m. ET.

Contact the Support Center by email or by phone.

- **Email**: help@grantsolutions.gov

- **Phone**: 1-866-577-0771