



OCLQS Portal – ODJFS Add/Remove a System User

Description:

This Job Aid describes the process of Adding or Removing a System User on the OCLQS Portal. In order to edit an existing system user, first remove the system user's role(s) and then add a new system user with the correct information.

Alternate Flow A of the Job Aid describes the process of Removing a Role from an Existing System User.

Alternate Flow B of the Job Aid describes the process of Adding a Role to an Existing System User.

Appendix: The appendix at the end of this document includes a table of the key activities that each ODJFS system user role has permission to do in the OCLQS Portal.

Related Job Aid(s):

- OCLQS Portal – Account Management

Step 1: Log In to the OCLQS Portal

Click **Log in as ODJFS User**

Note: If you do not have an OCLQS account, refer to the OCLQS Portal - Account Management Job Aid for the steps to create an account.





Step 2: Enter Log In Information

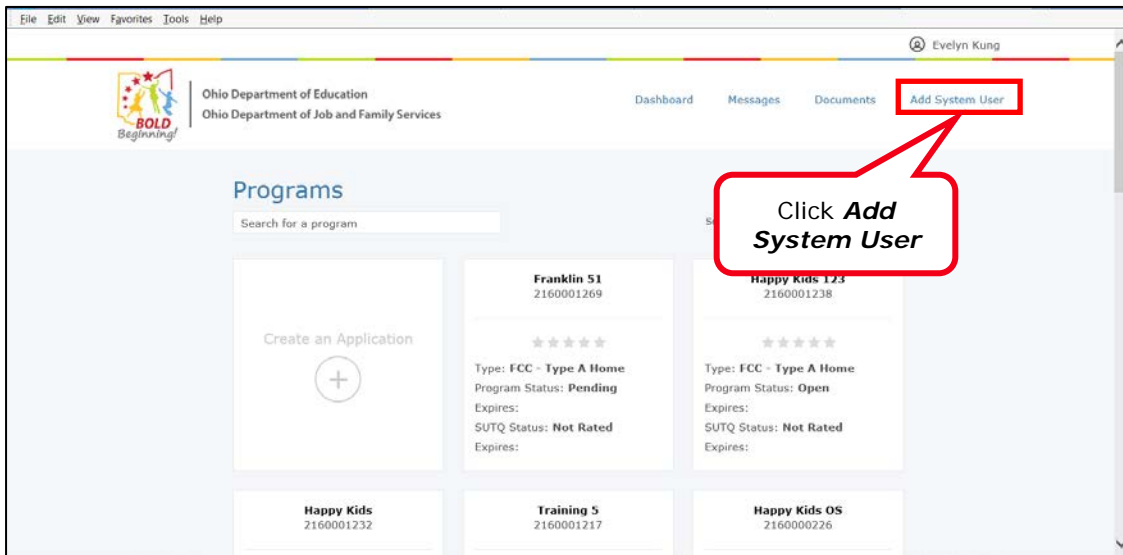
- 1) Enter **Email** address and **Password**
- 2) Click **Log In**

Note: If you do not remember your **Email** address and/or **Password**, refer to the OCLQS Portal - Account Management Job Aid for information on how to get log in information.



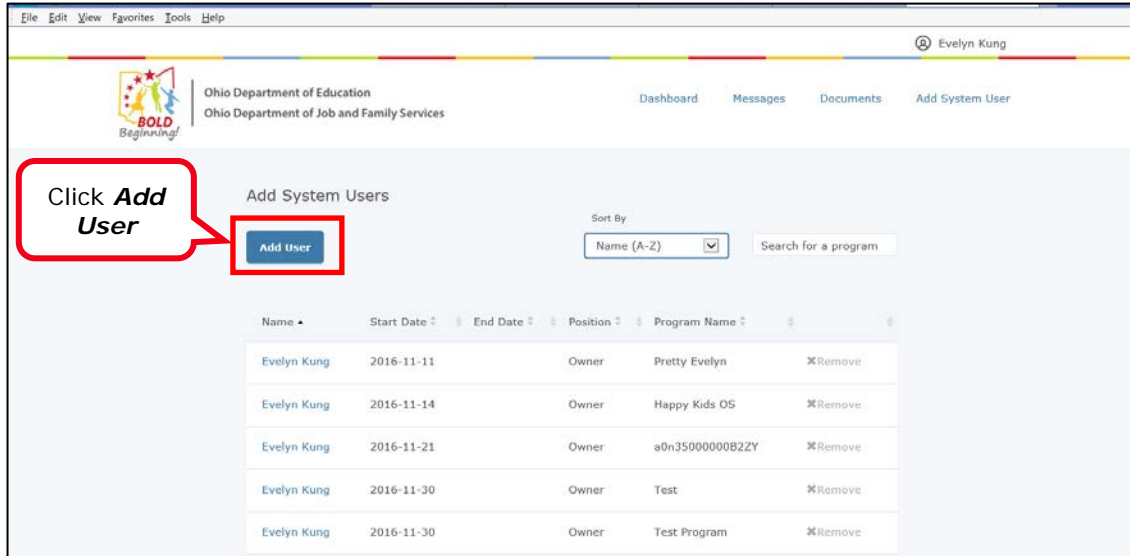
Step 3: Click Add System User

Click **Add System User**



Step 4: Add User

Click **Add User**



Click **Add User**

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Dashboard Messages Documents Add System User

Add System Users

Sort By
Name (A-Z)

Search for a program

Name	Start Date	End Date	Position	Program Name	
Evelyn Kung	2016-11-11		Owner	Pretty Evelyn	✕ Remove
Evelyn Kung	2016-11-14		Owner	Happy Kids OS	✕ Remove
Evelyn Kung	2016-11-21		Owner	a0n3500000B2ZY	✕ Remove
Evelyn Kung	2016-11-30		Owner	Test	✕ Remove
Evelyn Kung	2016-11-30		Owner	Test Program	✕ Remove



Step 5: Enter Information

Enter appropriate information for the user

Note: Each program that the user needs access to must be checked in the **Programs** section.

New System User Details

Basic Information

First Name *

Last Name *

Email *

Role Details

Role *

Access Start Date * Access End Date

Cancel

Programs

Access granted for

<input type="checkbox"/> another test 160015150	<input type="checkbox"/> dd 160014765
<input type="checkbox"/> Payment Test 160014811	<input type="checkbox"/> test for contact stickiness 160014623
<input type="checkbox"/> test for the rooms 160015098	<input type="checkbox"/> progress bar test 160014718
<input type="checkbox"/> Eddie's Kids Care 160014000	<input type="checkbox"/> Super Fun Kidzzzz 160014601
<input type="checkbox"/> Testing payments 160014951	<input type="checkbox"/> jk 170015246
<input type="checkbox"/> another test 160014747	<input type="checkbox"/> Documents Test 122916 160015161
<input type="checkbox"/> test 160014985	<input type="checkbox"/> Document Test > 5 MB 160015138
<input type="checkbox"/> test for doc upload 160014665	



Step 6: Save User

Click **Save**

New System User Details

Basic Information

First Name *

Last Name *

Email *

Role Details

Role *

Director

Access Start Date *

Access End Date

Cancel **Save**

Programs

Access granted for

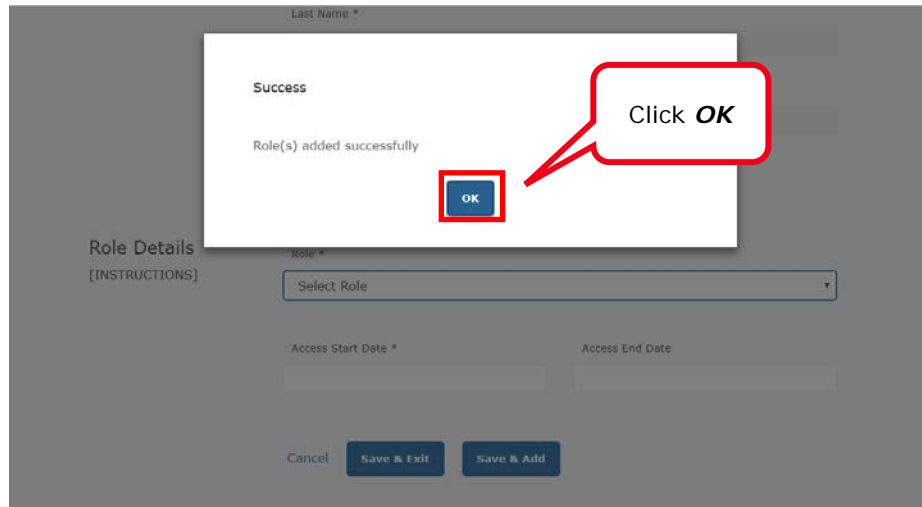
<input type="checkbox"/> another test 160015150	<input type="checkbox"/> dd 160014765
<input type="checkbox"/> Payment Test 160014811	<input type="checkbox"/> test for contact stickiness 160014623
<input type="checkbox"/> test for the rooms 160015098	<input type="checkbox"/> progress bar test 160014718
<input type="checkbox"/> Eddie's Kids Care 160014000	<input type="checkbox"/> Super Fun Kidzzzz 160014601
<input type="checkbox"/> Testing payments 160014951	<input type="checkbox"/> jk 170015245
<input type="checkbox"/> another test 160014747	<input type="checkbox"/> Documents Test 122916 160015161
<input type="checkbox"/> test 160014985	<input type="checkbox"/> Document test > 5 MB 160015138
<input type="checkbox"/> test for doc upload 160014665	

Back

Step 7: Click OK

Click **OK**

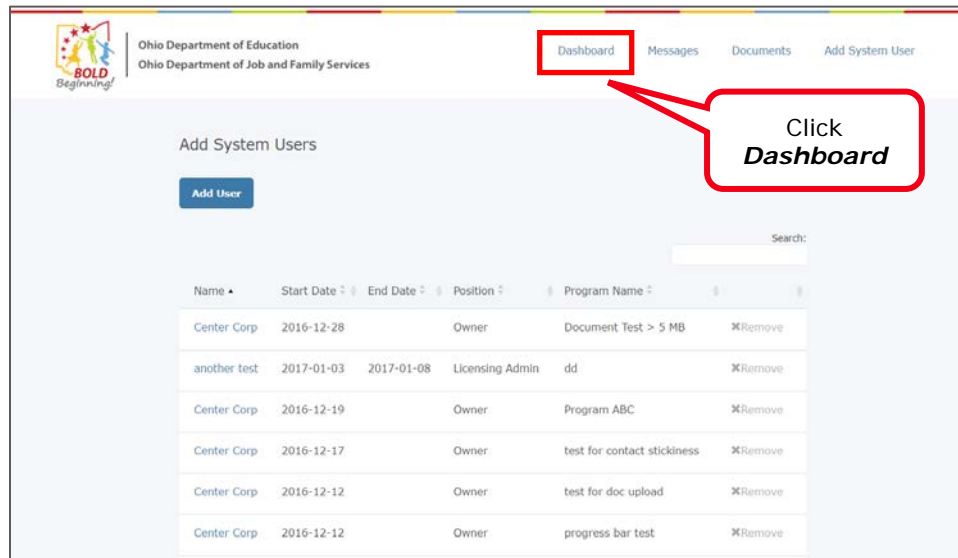
Repeat Steps 4 to 7 to add multiple system users.



Step 8: Add a User

Click **Dashboard** to return to the **Dashboard**

Note: The roles that have been added for this user will display in the list of users.



The process of Adding a System User is complete. The new user will receive an email with an activation link for the OCLOS account.



Alternate Flow A: Removing a Role for an Existing System User

Description:

This Job Aid describes the process of Removing a Role for an Existing System User on the OCLQS Portal. Complete Steps 1 to 3 of the main flow of this Job Aid and then start with Step A-1.

Step A-1: Search for Existing System User

Enter the name of the existing user in the **Search** field

The screenshot shows the 'Add System Users' interface. At the top left is an 'Add User' button. To the right is a search input field with the placeholder text 'Search:'. A red callout box points to this field with the text 'Enter name'. Below the search field is a table with columns: Name, Start Date, End Date, Position, Program Name, and a Remove button (✕). The table contains ten rows of user data. At the bottom right of the table area are pagination controls: 1, 2, 3, 4, 5, and Next.

Name	Start Date	End Date	Position	Program Name	
Center Corp	2016-12-28		Owner	Document Test > 5 MB	✕Remove
another test	2017-01-03	2017-01-08	Licensing Admin	dd	✕Remove
Center Corp	2016-12-19		Owner	Program ABC	✕Remove
Center Corp	2016-12-17		Owner	test for contact stickiness	✕Remove
Center Corp	2016-12-12		Owner	test for doc upload	✕Remove
Center Corp	2016-12-12		Owner	progress bar test	✕Remove
Center Corp	2016-12-13		Owner	another test	✕Remove
Center Corp	2016-12-13		Owner	dd	✕Remove
Center Corp	2016-12-15		Owner	Payment Test	✕Remove
Center Corp	2016-12-20		Owner	Eddie's Kids Care	✕Remove



Step A-2: Click Name

Click the name of the existing system user in the **Name** column

Add System Users

[Add User](#)

Search: tim

Name ▲	Start Date ▾	End Date ▾	Position ▾	Program Name ▾	
Tim Jefferson	2017-01-09		Licensing Admin	another test	✕Remove
Tim Jefferson	2017-01-09		Licensing Admin	dd	✕Remove

1 Next

Step A-3: Click Remove

Click **Remove** for the role that you would like to remove

Admin Details - Tim Jefferson

Basic Information

Enter the Name and Email Address of the person to whom you are granting access. An email will be sent to this email address for the new user to verify their account.

First Name *
Tim

Last Name *
Jefferson

E-mail *
timjefferson@mailinator.com

[+ Add Role](#)

Existing Roles

Role ID ▾	Access Start Date ▾	Access End Date ▾	Position ▾	Program Name ▾	
00097204	2017-01-09		Licensing Admin	another test	✕Remove
00097205	2017-01-09		Licensing Admin	dd	✕Remove

Step A-4: Remove Access User

Click **Remove Access**

Note: Repeat Steps A-3 to A-4 to remove multiple roles for the system user.

Remove Access ?

You are about to Remove Access , Are you sure ?

Cancel Remove Access

Name	Start Date	End Date	Position	Program Name	
Kelly Smith	2017-01-06		Director	Payment Test	✕Remove
Kelly Smith	2017-01-06		Director	test for the rooms	✕Remove
Kelly Smith	2017-01-06		Director	Documents Test 122916	✕Remove
Kelly Smith	2017-01-06		Director	Eddie's Kids Care	✕Remove

Step A-5: Return to Dashboard

Click **Dashboard** to return to the **Dashboard**

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Dashboard Messages Documents Add System User

Admin Details - Tim Jefferson

Basic Information

Enter the Name and Email Address of the person to whom you are granting access. An email will be sent to this email address for the new user to verify their account.

First Name *
Tim

Last Name *
Jefferson

E-mail *
timjefferson@mailinator.com

+ Add Role

Existing Roles

Role ID	Access Start Date	Access End Date	Position	Program Name	
00097204	2017-01-09		Licensing Admin	another test	✕Remove
00097205	2017-01-09		Licensing Admin	dd	✕Remove

The process of Removing a Role for an Existing System User is complete.

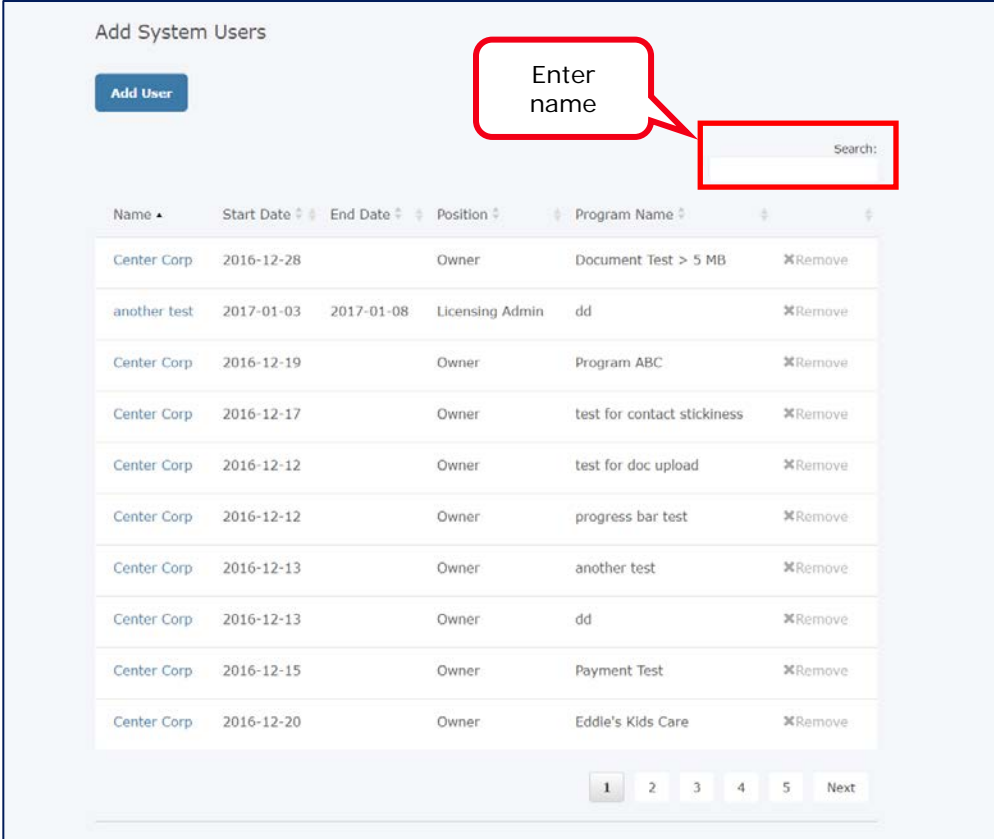
Alternate Flow B: Adding a Role for an Existing System User

Description:

This Job Aid describes the process of Adding a Role for an Existing System User on the OCLQS Portal. Complete Steps 1 to 3 of the main flow of this Job Aid and then start with Step B-1.

Step B-1: Search for Existing System User

Enter the name of the existing user in the **Search** field



Add System Users

[Add User](#)

Search:

Name	Start Date	End Date	Position	Program Name	
Center Corp	2016-12-28		Owner	Document Test > 5 MB	✕Remove
another test	2017-01-03	2017-01-08	Licensing Admin	dd	✕Remove
Center Corp	2016-12-19		Owner	Program ABC	✕Remove
Center Corp	2016-12-17		Owner	test for contact stickiness	✕Remove
Center Corp	2016-12-12		Owner	test for doc upload	✕Remove
Center Corp	2016-12-12		Owner	progress bar test	✕Remove
Center Corp	2016-12-13		Owner	another test	✕Remove
Center Corp	2016-12-13		Owner	dd	✕Remove
Center Corp	2016-12-15		Owner	Payment Test	✕Remove
Center Corp	2016-12-20		Owner	Eddie's Kids Care	✕Remove

1 2 3 4 5 Next



Step B-2: Click Name

Click the name of the existing system user in the **Name** column

Add System Users

[Add User](#)

Search: tim

Name ▲	Start Date ▾	End Date ▾	Position ▾	Program Name ▾	
Tim Jefferson	2017-01-09		Licensing Admin	another test	✕Remove
Tim Jefferson	2017-01-09		Licensing Admin	dd	✕Remove

1 Next

Step B-3: Add User Role

Click **Add Role**

Admin Details - Tim Jefferson

Basic Information

Enter the Name and Email Address of the person to whom you are granting access. An email will be sent to this email address for the new user to verify their account.

First Name *
Tim

Last Name *
Jefferson

E-mail *
timjefferson@mailinator.com

[+ Add Role](#)

Existing Roles

Role ID ▾	Access Start Date ▾	Access End Date ▾	Position ▾	Program Name ▾	
00097204	2017-01-09		Licensing Admin	another test	✕Remove
00097205	2017-01-09		Licensing Admin	dd	✕Remove



Step B-4: Enter Role Information

Enter appropriate information for the user

Note: Each program that the user needs access to must be checked in the **Programs** section.

Admin Details - Tim Jefferson

Basic Information

Enter the Name and Email Address of the person to whom you are granting access. An email will be sent to this email address for the new user to verify their account.

First Name *

Last Name *

E-mail *

Role Details

Choose the role you wish to assign this individual.

Role *

Access Start Date *

Access End Date

Cancel

Programs

Select the program(s) you wish this user to have access to. The user will have the same role at each program selected.

Access granted for

<input type="checkbox"/> another test 160015150	<input type="checkbox"/> dd 160014765
<input type="checkbox"/> Payment Test 160014811	<input type="checkbox"/> test for contact stickiness 160014623
<input type="checkbox"/> UAT Program 170015338	<input type="checkbox"/> test for the rooms 160015098
<input type="checkbox"/> progress bar test 160014718	<input type="checkbox"/> Eddie's Kids Care 160014000
<input type="checkbox"/> Program ABC 160014601	<input type="checkbox"/> Testing payments 160014951
<input type="checkbox"/> jk 170015246	<input type="checkbox"/> another test 160014747
<input type="checkbox"/> Documents Test 122916 160015161	<input type="checkbox"/> test 160014985
<input type="checkbox"/> Document Test > 5 MB 160015138	<input type="checkbox"/> test for doc upload 160014665

Existing Roles

Role ID	Access Start Date	Access End Date	Position	Program Name	
00097204	2017-01-09		Licensing Admin	another test.	<input type="button" value="Remove"/>
00097205	2017-01-09		Licensing Admin	dd	<input type="button" value="Remove"/>

Enter
information



Step B-5: Click Save

Click **Save**

Admin Details - Tim Jefferson

Basic Information
Enter the Name and Email Address of the person to whom you are granting access. An email will be sent to this email address for the new user to verify their account.

First Name *
Tim

Last Name *
Jefferson

E-mail *
timjefferson@mailinator.com

Role Details
Choose the role you wish to assign this individual.

Role *
Select Role

Access Start Date *
Access End Date

Cancel **Save**

Programs
Select the program(s) you wish this user to have access to. The user will have the same role at each program selected.

Access granted for

- another test 160015150
- Payment Test 160014811
- UAT Program 170015338
- progress bar test 160014718
- Program ABC 160014601
- jk 170015246
- Documents Test 122916 160015161
- Document Test > 5 MB 160015138
- dd 160014765
- test for contact stickiness 160014623
- test for the rooms 160015098
- Eddie's Kids Care 160014000
- Testing payments 160014951
- another test 160014747
- test 160014985
- test for doc upload 160014665

Existing Roles

Role ID	Access Start Date	Access End Date	Position	Program Name	
00097204	2017-01-09		Licensing Admin	another test	✕Remove
00097205	2017-01-09		Licensing Admin	dd	✕Remove

Back

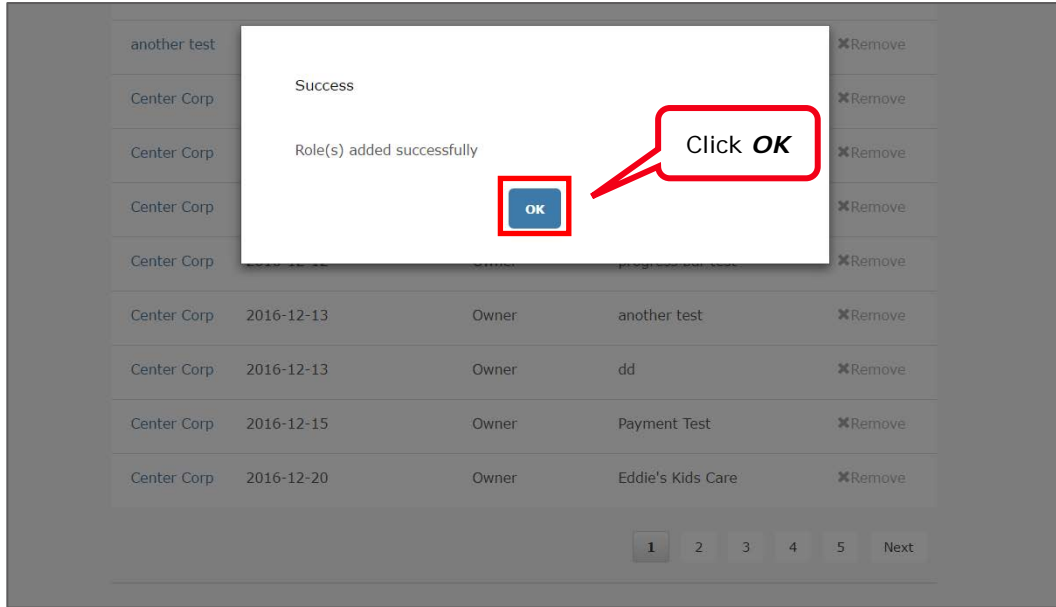
Click **Save**



Step B-6: Click OK

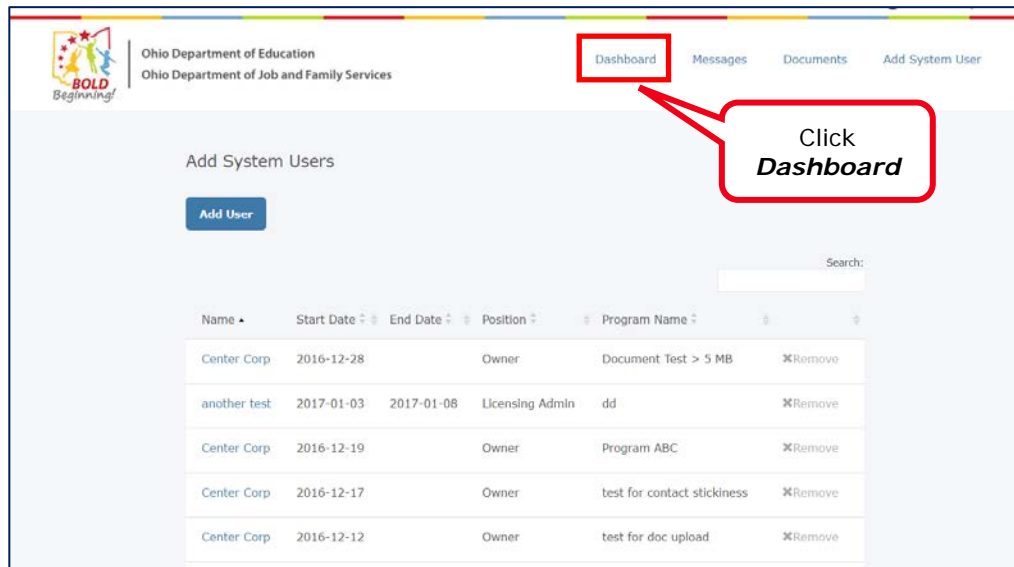
Click **OK**

Note: Repeat Steps B-1 to B-6 to add multiple roles for the system user.



Step B-7: Remove Access User

Click **Dashboard** to return to the **Dashboard**



The process of Adding a Role for an Existing System User is complete.



Appendix: Roles for ODJFS System Users

Description:

The table below describes the key activities that each ODJFS system user role has permission to do in the OCLQS Portal.

Owner	Director (Child Care Centers)	Licensing Admin	SUTQ Consultant
<ul style="list-style-type: none"> Respond to Corrective Action Plans Serious Incidents Amendments Updates 	<ul style="list-style-type: none"> Respond to Corrective Action Plans Serious Incidents Amendments Updates 	<ul style="list-style-type: none"> Respond to Corrective Action Plans Serious Incidents Amendments Updates 	
<ul style="list-style-type: none"> Initiate Licensing Applications Fill Licensing Applications Submit Licensing Applications Initiate SUTQ Registrations Fill SUTQ Registrations Submit SUTQ Registrations 	<ul style="list-style-type: none"> Initiate Licensing Applications Fill Licensing Applications Fill SUTQ Registrations Submit Licensing Applications 	<ul style="list-style-type: none"> Fill Licensing Applications Fill SUTQ Registrations 	<ul style="list-style-type: none"> Fill SUTQ Registrations
<ul style="list-style-type: none"> Create system users – can create users of any role except owner 	<ul style="list-style-type: none"> Create system users – can create Licensing Admin and SUTQ Consultant role users 		