



## ezFedGrants External Portal User Profile Management Job Aid

### Purpose

This job aid provides details on updating your ezFedGrants External Portal user profile contact information, educational credentials, and/or your availability for panel participation.

### Trigger

Perform this procedure when you need to update your ezFedGrants External Portal profile information and/or change your availability for participation in review panels.

### Prerequisites

- Access to the ezFedGrants External Portal

### Menu Path

Use the following menu path to begin this procedure:

- **eAuthentication > ezFedGrants External Portal Home Screen**

Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM
Test External	7/25/16 1:12 PM
News and Notes Post - NO3 ht	7/14/16 5:36 PM
News and Notes Post - NO2	7/14/16 5:13 PM

### Helpful Hints

- On certain screens you may need to scroll to view additional data fields.
- Certain screenshots may display only a portion of the screen. Note that when working within a system, only the center body of the screen will change. The navigation options along the left side of the screen and the header bar across the top of the screen will remain the same.

**Note:** Data used in this procedure is a representative sample for the purpose of training. Actual data in the system may vary based on agency and scenario.



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### Procedure

1. Start the procedure by accessing the **ezFedGrants External Portal Homepage** screen.

Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM
Test External	7/25/16 1:12 PM
News and Notes Post - NQ3 hc	7/14/16 5:36 PM
News and Notes Post - NQ2	7/14/16 5:13 PM

2. Click your username in the top right corner of the **ezFedGrants External Portal Homepage** screen.

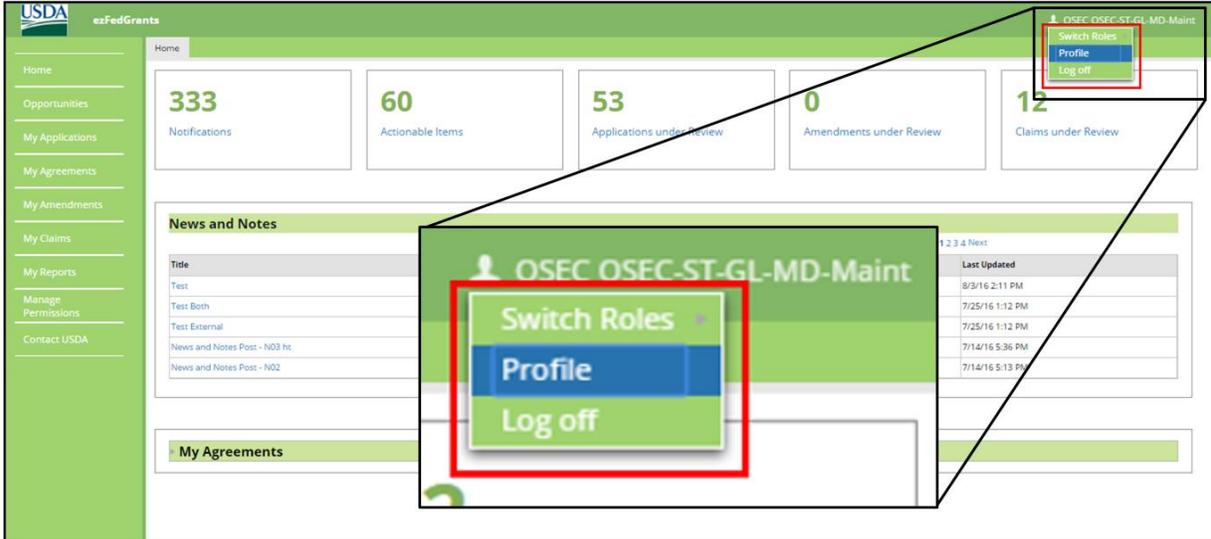
**Note:** You can access your profile from anywhere on the ezFedGrants external portal, you do not have to be on the **ezFedGrants External Portal Homepage** screen.

Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM
Test External	7/25/16 1:12 PM
News and Notes Post - NQ3 hc	7/14/16 5:36 PM
News and Notes Post - NQ2	7/14/16 5:13 PM

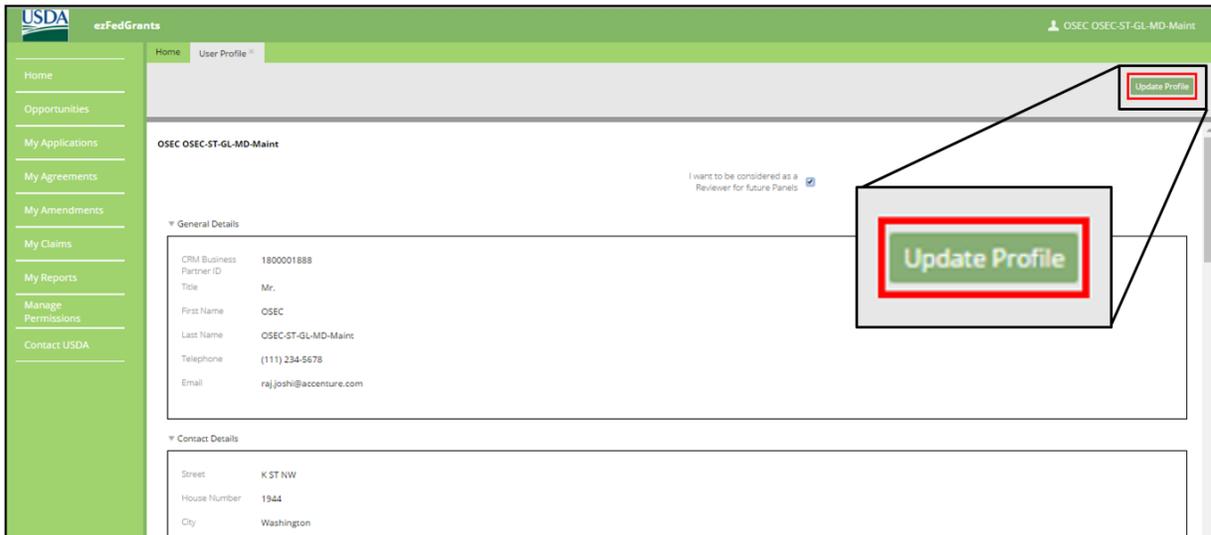


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3. Click the **Profile** option from the **Username** dropdown menu.



4. From the **User Profile** screen, click the **Update Profile** button to enable changes to your profile information.





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- The **Edit Operator Profile** popup window will appear when you click the **Update Profile** button. Scroll along the window to view all of the fields available for editing and make any changes you desire.

The screenshot shows the 'Edit Operator Profile' window with two sections: 'General Details' and 'Contact Details'. The 'General Details' section includes fields for CRM Business Partner ID (1800001888), Title (Mr.), First Name (OSEC), Last Name (OSEC-ST-GL-MD-Maint), Telephone ((111) 234-5678), and Email (raj.joshi@accenture.com). The 'Contact Details' section includes fields for Street (K ST NW), House Number (1944), City (Washington), State (District of Columbia), and Zip (20006).

- When you have made all of your desired changes, click the **OK** button to save your changes and return to the **User Profile** screen.

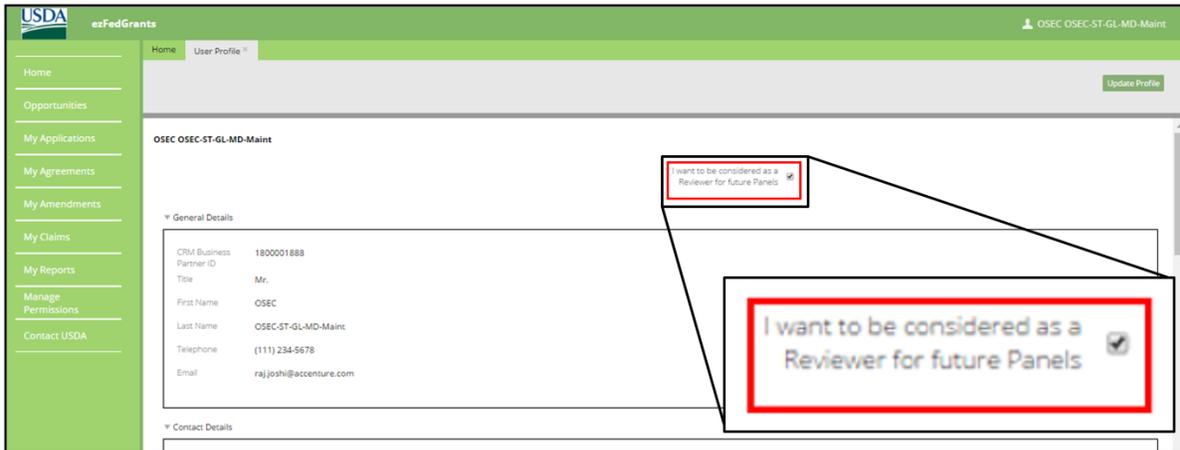
**Note:** To exit the **Edit Operator Profile** popup window without saving, click the **Cancel** button.

The screenshot shows the 'Edit Operator Profile' window with the 'Contact Details' section expanded. The 'OK' and 'Cancel' buttons are highlighted with a red box. The 'OK' button is orange and the 'Cancel' button is grey. The 'Contact Details' section includes fields for Street (K ST NW), House Number (1877), City (Washington), State (District of Columbia), Zip (20006), Country (United States), Academic Title (Bachelor of Arts), Occupation (Director), Fax ((222) 333-4444), Website, Communication Method (E-Mail), and Language.



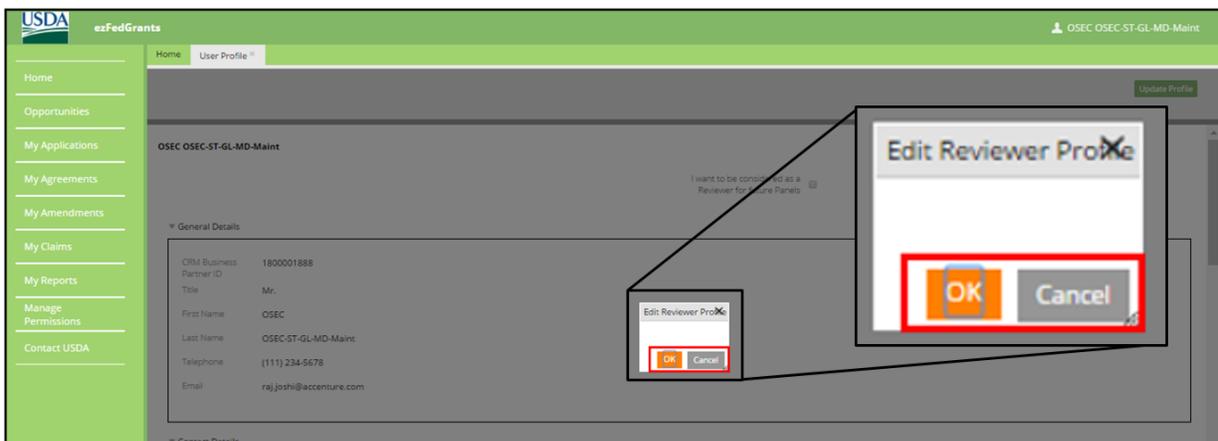
## ezFedGrants External Portal User Profile Management Job Aid

- To be considered as a reviewer for panels, you must indicate this preference on your ezFedGrants External Portal user profile. On the **User Profile** screen, click the checkbox to the right of the **I want to be considered as a Reviewer for future Panels** statement.



- The system will generate a popup to confirm your desire to be considered as a reviewer for future panels. Click the **OK** button if you are sure you would like to be considered as a reviewer for future panels. Click the **Cancel** button if you do not wish to be considered as a reviewer for future panels.

**Note:** Should you wish to withdraw your availability as a reviewer for future panels, click the **I want to be considered as a Reviewer for future Panels** checkbox on the **User Profile** screen to remove the checkmark. When the popup appears to confirm your choice, click the **OK** button to proceed to withdraw your availability as a reviewer, or click the **Cancel** button to remain available as a reviewer.





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- Once you have confirmed your desire to be considered as a reviewer for future panels, the system will generate a **Reviewer Profile** section on the **User Profile** screen. Scroll down the **User Profile** screen to view the **Reviewer Profile** section.

The screenshot shows the 'User Profile' page in the ezFedGrants system. The 'Reviewer Profile' section is highlighted with a red border. The information displayed is as follows:

Highest Education	BA
Degree Area	
Professional Title/Rank	Assistant Professor
Organization Type	Academia
Institution Type	1862 Land-grant university
Percentage of Appointment	% Research
	% Teaching
	% Extension / Outreach
	% Administration
Department/Unit	
Gender	Male
Race	<input type="checkbox"/> American Indian or Alaska Native
	<input type="checkbox"/> Asian
	<input type="checkbox"/> Black or African American
	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander
	<input type="checkbox"/> White

- Click the **Update Profile** button to make changes to the information in the **Reviewer Profile** section.

The screenshot shows the 'User Profile' page with the 'Update Profile' button highlighted by a red box. A callout box with a red border and the text 'Update Profile' is positioned over the button. The 'Reviewer Profile' section is visible in the background.



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11. Scroll down on the **Edit Operator Profile** popup window to view the **Reviewer Details** section to make changes to the **Reviewer Profile** section of your user profile.

The screenshot shows the 'Edit Operator Profile' window with the 'Reviewer Details' section expanded. The fields are as follows:

- Highest Education: BA
- Degree Area: (empty)
- Professional Title/Rank: Assistant Professor
- Organization Type: Academia
- Institution Type: 1862 Land-grant university
- Percentage of Appointment: % Research, % Teaching, % Extension / Outreach, % Administration
- Department/Unit: (empty)
- Gender: Male
- Race:  American Indian or Alaska Native,  Asian

12. When you have updated the desired fields in the **Reviewer Details** section, click the **OK** button to save your changes.

**Note:** To exit the **Edit Operator Profile** popup window without saving, click the **Cancel** button.

The screenshot shows the 'Edit Operator Profile' window with the 'Reviewer Details' section expanded. The fields are updated as follows:

- Highest Education: MA
- Degree Area: Agricultural Sciences
- Professional Title/Rank: Assistant Professor
- Organization Type: Academia
- Institution Type: 1862 Land-grant university
- Percentage of Appointment: % Research, % Teaching, % Extension / Outreach
- Department/Unit: (empty)
- Gender: (empty)
- Race:  American Indian or Alaska Native,  Asian,  Black or African American,  Native Hawaiian or Other Pacific Islander,  White
- Ethnicity: Hispanic or Latino

The OK and Cancel buttons are highlighted with a red box. A black triangle points from this box to a smaller red box highlighting the OK and Cancel buttons at the bottom of the window.



## ezFedGrants External Portal User Profile Management Job Aid

13. Scroll along the **User Profile** screen to confirm your changes have been applied.

USDA ezFedGrants OSEC OSEC-ST-GL-MD-Maint

Home User Profile Update Profile

OSEC OSEC-ST-GL-MD-Maint

I want to be considered as a Reviewer for future Panels

▼ General Details

CRM Business Partner ID	1800001888
Title	Mr.
First Name	OSEC
Last Name	OSEC-ST-GL-MD-Maint
Telephone	(111) 234-5678
Email	raj.joshi@accenture.com

▼ Contact Details

Street	K ST NW
House Number	1877
City	Washington
State	District of Columbia



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### Comments

Refer to the following additional materials:

- ezFedGrants External Portal Access Requests Job Aid
- ezFedGrants External Portal Overview & Navigation for External Users Job Aid