



ezFedGrants External Portal User Role Management Job Aid

Purpose

This job aid provide details on accepting new ezFedGrants External Portal access requests, deactivating user access, and/or changing existing user roles for users within your recipient organization.

Trigger

Perform these procedures when a member of your organization has requested access to the ezFedGrants External Portal, when a member's access should to be deactivated, and/or when a member's user role needs to be changed.

Prerequisites

- In order to accept access requests, change use roles, or deactivate user access, you must have a Grants Administrative Officer user role in the ezFedGrants External Portal for your recipient organization.

Menu Path

Use the following menu path to begin this procedure:

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

The screenshot shows the ezFedGrants External Portal Home Screen. The page has a green header with the USDA logo and the text "ezFedGrants". On the right side of the header, there is a user profile icon and the text "OSEC OSEC-ST-GL-FI-Rep". A left-hand navigation menu lists various options: Home, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, Manage Permissions, and Contact USDA. The main content area features five summary cards: "32 Notifications", "19 Actionable Items", "1 Applications under Review", "0 Amendments under Review", and "1 Claims under Review". Below these cards is a "News and Notes" section with a table listing recent posts. The table has columns for "Title" and "Last Updated".

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 - N03 ht	7/14/16 5:36 PM
News and Notes Post - N02	7/14/16 5:13 PM



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Helpful Hints

- On certain screens you may need to scroll to view additional data fields.
- The process of changing or deactivating existing user access/roles begins on step 14.
- 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 - N03 ht	7/14/16 5:36 PM
News and Notes Post - N02	7/14/16 5:13 PM

2. Click the **Actionable Items** tile.

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 - N03 ht	7/14/16 5:36 PM
News and Notes Post - N02	7/14/16 5:13 PM



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3. In the **Actionable Items for Past 90 Days** popup window, locate the **Transaction ID** column, and click the transaction ID of the user access request you wish to take action on. To see access requests that were submitted more than 90 days ago, click the **View All Actionable Items** link at the bottom of the popup window.

Note: User access requests can be differentiated from other actionable items by their transaction ID, which begins with "RA-".

Transaction	Transaction ID	RAIN	Status	Due Date	Last Updated
Request Access	RA-533		Submitted		8/24/16
Claim	CLM-687	AP1612-APACXG036	Draft		8/24/16
Financial Report	AP16ACXXXXX002-FI-Q4-16	AP16ACXXXXX002	Not started	9/22/16	8/23/16
Performance Report	AP16ACXXXXX002-PE-Q4-16	AP16ACXXXXX002	Not started	9/22/16	8/23/16
Performance Report	AP1612-APPPQC005-PE-Annual-16	AP1612-APPPQC005	Not started	11/2/16	8/23/16
Financial Report	AP1612-A				
Performance Report	AP16ACX				
Report					
Financial Report	AP16 2-P				
Report					

4. On the **Request Access** screen, click each of the three tabs in the **Request Access** section (**Role Selection**, **Organization**, and **Personal Information**) to review the access request. Then locate the **DECISION** section, and click the **Please select an option** field.

Request Access (RA-533)

Status: Submitted

DECISION:

Please select an option

Request Access

Role Selection Organization Personal Information

Role Selection

User Role Grant Processor

Justification Narrative

I am a grants processor for the university



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- Click the appropriate option from the **Please select an option** dropdown menu to take action on the access request. To approve the access request, select the **Accept** option. To deny the request click the **Reject** option.

Note: Depending on the option you select, additional fields will appear on the **Request Access** screen relevant to the chosen option.

The screenshot shows the 'Request Access (RA-533)' page. The status is 'Submitted'. A dropdown menu labeled 'Please select an option' is highlighted with a red box, showing 'Accept' and 'Reject' options. A larger callout box on the right shows a 'DECISION:' section with the same dropdown menu and 'Accept' and 'Reject' buttons highlighted with a red box.

- Some agencies may require justification or comments for request access approvals. If needed, type these comments into the **Acceptance Comments** text box.

Note: If you are rejecting an access request, this text box will be labeled "Rejection Comments". Please proceed to the note for step 13 to conclude the access request rejection process.

The screenshot shows the 'Request Access (RA-533)' page. The status is 'Submitted'. The 'Acceptance Comments' text box is highlighted with a red box, containing the text 'This individual is a grants processor for the university'. A larger callout box on the right shows a 'DECISION:' section with the 'Accept' button highlighted with a red box and the 'Acceptance Comments' text box highlighted with a red box.



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- If you wish to accept the access request with a role other than the one the user has requested, click the **User Role** field to select a different user role.

The screenshot shows the 'Request Access (RA-533)' page in the ezFedGrants system. The status is 'Submitted'. Under the 'DECISION' section, there is a 'Please select an option' dropdown and a 'Submit' button. Below this, there is an 'Accept' section with an 'Acceptance Comments' field. A callout box labeled 'Role Selection' points to a dropdown menu that currently shows 'Grant Processor'. Another callout box labeled 'Role Selection' points to a 'User Role' dropdown menu in the 'Your Contact Details' section, which also shows 'Grant Processor'.

- Select the role you would like the user to have from the **User Role** dropdown menu.

This screenshot is similar to the previous one, but the 'User Role' dropdown menu in the 'Your Contact Details' section is open, showing a list of roles: 'Grant Processor', 'Grant Processor', 'Signatory Official', 'Grant Administrative Officer', and 'Reviewer'. A callout box labeled 'Role Selection' points to this dropdown menu. Another callout box labeled 'Role Selection' points to the 'User Role' dropdown menu in the 'Your Contact Details' section, which is also open and showing the same list of roles.



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9. When accepting a user access request, the system will require you to check that the user does not already have a role in the **ezFedGrants External Portal**. To begin this search, click the **Find Contact** button.

The screenshot shows the 'Request Access' page in the ezFedGrants system. The page title is 'Request Access (RA-533)'. The status is 'Submitted'. There is a 'DECISION:' section with a dropdown menu and a 'Submit' button. Below that is an 'Accept' section with an 'Acceptance Comments' field containing the text 'This individual is a grants processor for the university'. There is a 'Role Selection' section with a dropdown menu set to 'Grant Processor'. At the bottom, there is a 'Your Contact Details' section with a 'Find Contact' button highlighted in red. The 'Find Contact' button is also highlighted in a callout box with the text 'Your Contact Details' and 'Find Contact'.

10. In the **Find Contact** popup window, enter the applicable/known search criteria in the search fields.

The screenshot shows the 'Find Contact' popup window. The organization is 'CALIFORNIA DAIRY RESEARCH FOUNDATIO N'. There are four search fields: 'First Name', 'Last Name', 'Email Address', and 'CRM Business Partner ID'. The 'Email Address' field has a help icon. There are 'Search' and 'Clear' buttons at the bottom. The search fields are highlighted in red in the original image.



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11. Once you have completed the relevant fields, click the **Search** button.

Find Contact

Organization CALIFORNIA DAIRY RESEARCH FOUNDATIO N

First Name

Last Name

Email Address ?

CRM Business Partner ID

12. If the search results show that the user already has a role in the ezFedGrants external portal, you may need to reject the request. Consult your agency-specific guidelines for further guidance on how to proceed.

If the search results show that the user does **not** already have a role, click the **X** button in the top right corner of the **Find Contact** popup window to exit the search and continue approving the access request.

Find Contact

Email Address ?

CRM Business Partner ID

Search Results

First Name	Last Name	Email Address	City	State	CRM Business Partner ID
No Search Results Were Found					



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13. To approve the access request, click the **Submit** button.

Note: If you are rejecting an access request, clicking the **Submit** button will finalize the rejection.

The screenshot shows the 'Request Access (RA-533)' page in the ezFedGrants portal. The status is 'Submitted'. A callout box labeled 'DECISION:' points to a dropdown menu with the text 'Please select an option' and a 'Submit' button, both of which are highlighted with red boxes. Below the decision section, there is an 'Accept' section with an 'Acceptance Comments' field containing the text 'This individual is a grants processor for the university'. There is also a 'Role Selection' section with a dropdown menu set to 'Grant Processor' and a 'Your Contact Details' section with input fields for 'First Name', 'Last Name', and 'City'.

14. After a user has gained access to the ezFedGrants External Portal, an individual with the Grants Administrative Officer role may change or deactivate the user access or role. To begin these procedures, click the **Manage Permissions** file.

The screenshot shows the 'Request Access (RA-533)' page in the ezFedGrants portal. The status is 'Approved'. A callout box labeled 'Manage Permissions' points to a green button with the text 'Manage Permissions', which is highlighted with a red box. Below the 'Manage Permissions' button, there is a 'Request Access' section with tabs for 'Role Selection', 'Organization', 'Personal Information', and 'Comments'. The 'Role Selection' tab is active, showing a 'User Role' dropdown set to 'Grant Processor' and a 'Justification Narrative' field containing the text 'I am a grants processor for the university'.



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15. On the **Manage Permissions** screen, enter the relevant information into the available search fields for the user(s) whose permissions you wish to amend.

Note: Using only the **Role** field will display all users with the selected role.

The screenshot shows the 'Manage Permissions' page in the ezFedGrants portal. The left sidebar contains navigation links: Home, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, Manage Permissions, and Contact USDA. The main content area has a breadcrumb trail: Home > RA-533 > Manage Permis... > Manage Permissions. Below the breadcrumb is a 'Search Criteria' section with three input fields: 'Name' (a text box), 'User ID' (a text box), and 'Role' (a dropdown menu with 'Select...' selected). Below these fields are 'Search' and 'Clear' buttons. A red box highlights the search criteria fields.

16. Once you have entered the applicable search criteria, click the **Search** button.

This screenshot is identical to the previous one, but the 'Search' button is now highlighted with a red box. The 'Role' dropdown menu is now set to 'Grant Processor'.



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17. You may make changes to user access and roles directly from the search results on the **Manage Permissions** screen. These actions are detailed further in the steps below.

Click the **Role** field next to the relevant user to view the role options for that user from the dropdown menu. Change the user's role by selecting one of the options.

Deactivate user access by clicking the red **Deactivate** button on the relevant user's role.

The screenshot shows the 'Manage Permissions' page in the ezFedGrants portal. The search criteria are: Name (empty), User ID (empty), and Role (Grant Processor). The search results table is as follows:

Name	User ID	Role	Options
NASS NASS-ST-FM-BUD-Cord	28200907270011146168664	Grant Processor	Change Deactivate
OSEC OSEC-ST-PP-FACT-Proc	28200907280011827439014	Grant Processor	Change Deactivate

18. In the below screenshot the second user's role has been updated from **Grant Processor** to **Grant Administrative Officer**. Click the **Change** button to apply a role change.

The screenshot shows the 'Manage Permissions' page with the search criteria: Name (empty), User ID (empty), and Role (Grant Processor). The search results table is as follows:

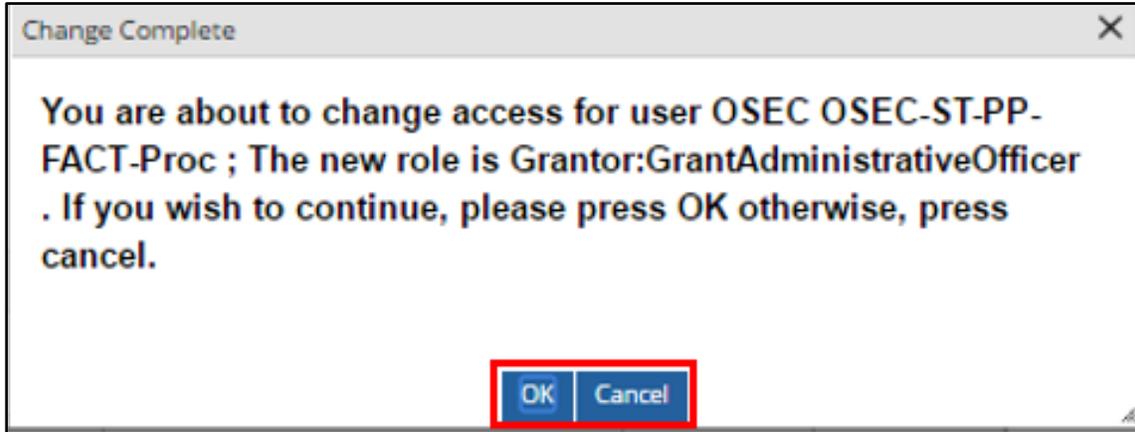
Name	User ID	Role	Options
NASS NASS-ST-FM-BUD-Cord	28200907270011146168664	Grant Processor	Change Deactivate
OSEC OSEC-ST-PP-FACT-Proc	28200907280011827439014	Grant Administrative Officer	Change Deactivate

A callout box highlights the role change for the second user, showing a dropdown menu with 'Grant Administrative Officer' selected and a 'Change' button next to it.



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19. The system will generate a warning that you are about to change a user's role/permissions. To proceed with and save the change, click the **OK** button. To cancel the change and return to the **Manage Permissions** screen, click the **Cancel** button.



20. To deactivate a user's access to the entire ezFedGrants External Portal for your recipient organization, click the **Deactivate** button on the relevant user's row.

The screenshot shows the 'Manage Permissions' interface. On the left is a navigation menu with options like Home, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, Manage Permissions, and Contact USDA. The main content area has search criteria for Name, User ID, and Role (set to Grant Processor). Below the search criteria is a table of search results. The table has columns for Name, User ID, Role, and Options. The 'Options' column contains 'Change' and 'Deactivate' buttons. A red box highlights the 'Deactivate' button for the user 'OSEC OSEC-ST-PP-FACT-Proc'. A callout box also highlights this 'Deactivate' button.

Name	User ID	Role	Options
NASS NASS-ST-FM-BUD-Cord	2820090727001146168664	Grant Processor	Change Deactivate
OSEC OSEC-ST-PP-FACT-Proc	28200907280011827439014	Grant Administrative Officer	Change Deactivate



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21. The system will generate a warning that you are about to deactivate a user's access to the ezFedGrants External Portal. To proceed with and save the deactivation, click the **OK** button. To cancel the deactivation and return to the **Manage Permissions** screen, click the **Cancel** button.





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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