



ezFedGrants External Portal Onboarding & Basics Job Aid



Purpose

This job aid provides details for external users (grant award applicants or recipients) on gaining access to the ezFedGrants External Portal, and describes basic content and navigation of the ezFedGrants External Portal.

For information on searching in the ezFedGrants External Portal and manipulating search results (filtering, exporting, etc.), refer to the **ezFedGrants External Portal Search Functionality Job Aid**.

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Trigger

Review this information in preparation for using the ezFedGrants External Portal.

Helpful Hints

- The term “external user” refers to non-USDA individuals such as grant applicants, award recipients, cooperators, etc.
- Internet Explorer 10 is the recommended browser for the ezFedGrants External Portal.
- The menu options, links and other features available in the ezFedGrants External Portal vary based on user role and permissions. Therefore, you may not have access to all of the functionalities described here.
- 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.

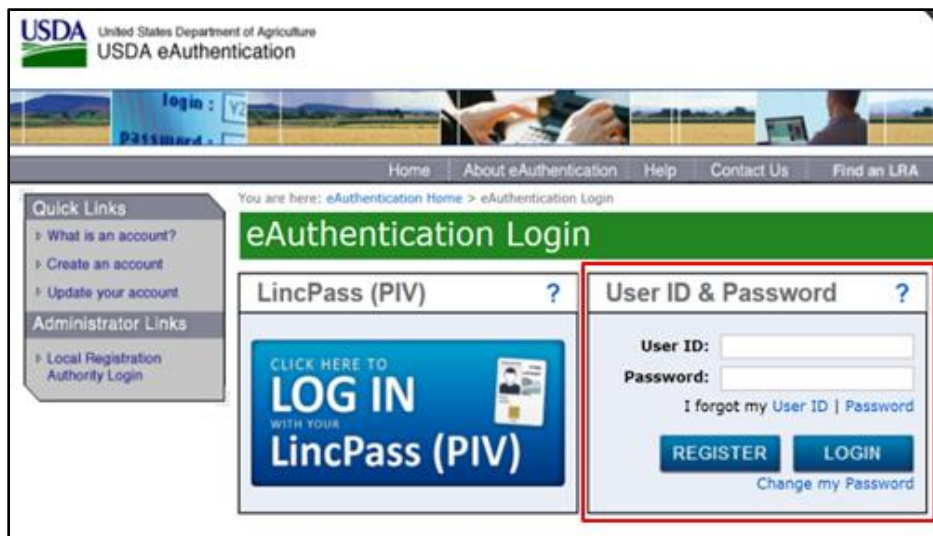


Procedure

Accessing the ezFedGrants External Portal

1. In order to access the ezFedGrants External Portal, you must meet the following prerequisites:
 - Your organization must be registered at SAM.gov and exist as a business partner in the USDA Financial Management Modernization Initiative System (FMMI).
 - You must have an eAuthentication Level 2 Account.
 - Please refer to the **eAuthentication Level 2 Account Creation Job Aid** for more information.
2. Once your organization is registered and you have an eAuthentication Level 2 Account, you must submit an access request for the ezFedGrants External Portal.

Log in to the ezFedGrants Portal by clicking the **Launch ezFedGrants** button on the [USDA Financial Shared Services ezFedGrants](#) website. Log in through the **eAuthentication** screen using your eAuthentication Account user name and password.



3. Submit an access request by following the instructions provided in the **ezFedGrants External Portal Access Request Submission Job Aid**.
4. Once your access request is approved, you can return to the ezFedGrants External Portal by the same method described in step two of this section.

The remainder of this document provides an introductory overview for understanding the basic components of the ezFedGrants External Portal and how to navigate within the ezFedGrants External Portal.

For details on the search functionality in the ezFedGrants External Portal, please refer to the **ezFedGrants External Portal Search Functionality Job Aid**.



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Navigation & Basics for All Users

The following section discusses the basic navigation options in the ezFedGrants External Portal for all roles except the **Reviewer** role.

For guidance on navigating as a Reviewer, please refer to the **Navigation & Basics for Reviewers** subsection of this document.

The center portion of the screen will change to display the active screen, but this does not mean the previous screen is gone. The ezFedGrants External Portal uses a tab system similar to many web browsers, in which new screens open in new tabs. Tabs appear along the top of the screen. You cannot have more than seven tabs open at once.

Action Tiles

Actions tiles appear across the top of the **Home** screen and include work items or business objects under review or awaiting action by yourself or another user. The five action tiles are:

- **Notifications**
- **Actionable Items**
- **Applications under Review**
- **Amendments under Review**
- **Claims under Review**

The **Notifications** tile provides read-only status updates on various ezFedGrants System processes and events, such as application statuses, access requests, reports, etc. When clicked, the **Notifications for Past 90 Days** popup window will appear, which displays replicas of any email messages sent to you through the ezFedGrants System in the past 90 days.

The screenshot shows the Home page of the ezFedGrants External Portal. The top navigation bar includes the USDA logo, the text 'ezFedGrants', and a user profile icon for 'OSEC OSEC-ST-GL-MD-Maint'. A left sidebar contains navigation links: Home, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, and Contact USDA. The main content area features five action tiles: Notifications (299), Actionable Items (45), Applications under Review (46), Amendments under Review (0), and Claims under Review (0). The Notifications tile is highlighted with a red border. Below the tiles is a 'News and Notes' section with a table listing recent updates.

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



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To view notifications older than 90 days, click the **View All Notifications** link at the bottom of the **Notifications for Past 90 Days** popup window.

You cannot take action on the referenced items in your **Notifications** list, these are read-only messages.

Filter and sort the columns in the **Notifications for Past 90 Days** popup window by clicking the small arrows in the top right corner of each column header.

View a notification message by clicking the **View Message** link. Once a message is viewed, the **View** column will display a green checkmark.

Transaction	Transaction	Status	Sent	View Message	View
Application	APP-3927	Considered	9/2/16	View Message	✓
Application	FAS-APP-54	Approved	8/25/16	View Message	✉
Application	FAS-APP-54	Grant Review	8/25/16	View Message	✉
Application	FAS-APP-54	Grant Review	8/25/16	View Message	✉
Application	FAS-APP-86	Considered	8/16/16	View Message	✉
Application	FAS-APP-54	Considered	8/1/16	View Message	✉

[View All Notifications](#)

The **Actionable Items** tile provides quick links to work items pending approval by the user. When clicked, the **Actionable Items for Past 90 Days** popup window will appear, displaying any items sent to you for action in the past 90 days.

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



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View the **Actionable Items for Past 90 Days** popup window often to ensure work items (such as grants applications) are not missed or delayed.

The work items sent to you will depend on your user role, the type of item (application, report, claim, etc.), and the stage of the workflow the item has reached.

Click the **View All Actionable Items** link at the bottom of the **Actionable Items for Past 90 Days** popup window to view actionable items older than 90 days. Clicking the **View All Actionable Items** link will close the **Actionable Items for Past 90 Days** popup window and open the **Actionable Items** screen (not a popup window)

Actionable Items for Past 90 Days

Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Performance Report	TA-CA-16-089-PE-Annual-16	TA-CA-16-089	Draft Pending Signature	5/1/16	8/24/16
Performance Report	AP16PPQFLDOPC001-PE-Q3-16	AP16PPQFLDOPC001	Draft Pending Signature	9/22/16	8/24/16
Financial Report	NI16AHDRXXXXG024-FI-Annual-16	NI16AHDRXXXXG024	Draft Pending Signature	11/21/16	8/24/16

[View All Actionable Items](#)

On the **Actionable Items** screen, you can filter your actionable items by selecting an option from the **Category** dropdown menu, or click the small arrow in the title cell of certain columns to view and apply filter and sort options based on the information in the selected column.

Actionable Items

Category

Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Performance Report	TA-CA-16-089-PE-Annual-16	TA-CA-16-089	Draft Pending Signature	5/1/16	8/24/16
Performance Report	AP16PPQFLDOPC001-PE-Q3-16	AP16PPQFLDOPC001	Draft Pending Signature	9/22/16	8/24/16
Financial Report	NI16AHDRXXXXG024-FI-Annual-16	NI16AHDRXXXXG024	Draft Pending Signature	11/21/16	8/24/16
Claim	CLM-617	TA-CR-16-111	Draft Pending Signature		5/23/16
Application	APP-874		Draft		4/27/16
Application	APP-772		Draft		4/19/16

In general, work items in the ezFedGrants External Portal are assigned by:

- **User Role:** Some work items are automatically assigned to all users with a certain user role or permission.
 - In this case you make not necessarily need to take action on an item, even though it appears in your worklist.
- **Specific Assignment:** Some work items are assigned directly to a few specific users.
 - You may be designated as a specific signatory or certifier for an item.
 - You may be the creator or manager of an item, such as an opportunity or panel, and therefore may be one of only a few users who may modify that item.



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Only one user can access a work item or modify a business object (i.e. a claim, report, or application) at a time. When another user has accessed a work item, the work item may disappear from your actionable items list until the user exits the work item. If another user completes the work item, the work item **will not** reappear on your actionable items list. If another user is modifying a business object (i.e. claim, report, application) you will only be able to view a “read-only” version of that business object.

The **Applications under Review**, **Amendments under Review**, and **Claims under Review** tiles contain status updates on your applications, amendments, and claims, respectively. Depending on your user role, you may see all items for your organization, or only those items you are directly associated with.

These tiles provide read-only versions of applications, amendments and claims current being reviewed by USDA Agencies.

Note: At this time, amendments are not submitted through the ezFedGrants External Portal. Until this functionality is released, the **Amendments under Review** tile will remain at zero. Any amendment work items pending your action will be available through the **Actionable Items** tile.

Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM

Navigation Menu

The navigation menu appears along the left side of the screen and contains links to different screens within the ezFedGrants External Portal. The navigation menu is always available, regardless of the screen you are currently viewing.

Small resolution screens and magnified or zoomed views may cause the left-hand navigation menu to collapse. If this is the case, click the icon in the top left corner of the screen to display the navigation menu, or try zooming out 100% or 75% by simultaneously pressing the **Control (ctrl)** and **minus (-)** keys on your keyboard. To zoom in, simultaneously press the **Control (ctrl)** and **plus (+)** keys.

Previously-created business objects (claims, reports, applications, etc.) accessed through the navigation menu are usually read-only, meaning they cannot be edited. If you need to take action on a draft business object (such as a draft application or report), you must access that item through the **Actionable Items** tile on the **Home** screen.



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The navigation menu options are **Home**, **Opportunities**, **My Applications**, **My Agreements**, **My Amendments**, **My Claims**, **My Reports**, and **Contact USDA**. Depending on your user role, upon clicking one of these options, you may see a dropdown menu with additional options related to that category. For example, if you click the **My Applications** option, you may see a dropdown menu with options for **Create Application** and **Search Applications**.

The **My Agreements** option opens the **Search Agreements** screen, where you may search for and view your organization's agreements. Depending on your user role, you may see all agreements for your organization, or only those agreements you are directly involved with. The ezFedGrants System **does not** currently include historical agreement data. At this time, you will only see agreements created after the awarding agency began using the ezFedGrants System. Some agencies are in the process of loading historical agreement data into ezFedGrants. If necessary, you can request historical agreement data directly from the relevant awarding agency.



Depending on your user role, the **My Applications** and **My Claims** options may display dropdown menus when clicked. The possible options on these menus are: **Create Application**, **Search Applications**, **Create Claim**, and **Search Claims**.

If your user role does not include the ability to create applications or claims, clicking the **My Applications** or **My Claims** options will automatically open either the **Search Applications** or **Search Claims** screens, respectively.

Only USDA staff may create opportunities, agreements, or amendments. Therefore, all external users, regardless of user role, will only have access to the **Search Opportunities**, **Search Amendments**, and **Search Agreements** screens for the **Opportunities**, **My Amendments**, or **My Agreements** options.





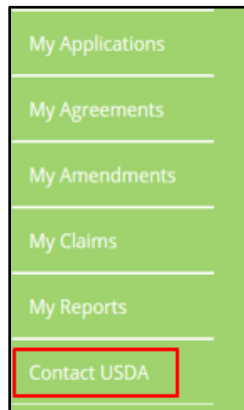
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The **My Reports** option allows you to search for and view relevant reports and report statuses.



The **Contact USDA** option allows you to contact the ezFedGrants Help Desk.



News and Notes

The **News and Notes** section of the **ezFedGrants External Portal Home** displays announcements about the ezFedGrants System. Upon clicking a link within the **Title** column of the **News and Notes** section, a popup window will appear which displays the full text of the announcement.

News and Notes	
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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Navigation & Basics for Reviewers

Applications against certain types of grant award opportunities must be reviewed and scored by a panel. This is referred to as the Application Review Panel (ARP) process. Not all agencies use this process, but those that do have the option to allow external users (grant award applicants & recipients) to participate in these panel reviews.

If you participate in the ARP process you must obtain the **Reviewer** role by:

- Checking the **I want to be considered a Reviewer for future Panels** checkbox on the **User Profile** screen in the ezFedGrants External Portal.
 - Please refer to the **ezFedGrants External Portal User Profile Management Job Aid** for more information on this.
- **OR** requesting the Reviewer role when submitting an access request for the ezFedGrants External Portal.

If you are assigned to a panel, you will receive various work items while the panel is reviewing an application. If you have another role in the ezFedGrants External Portal, you must switch to the **Reviewer** role in order to access your panel-related work items.

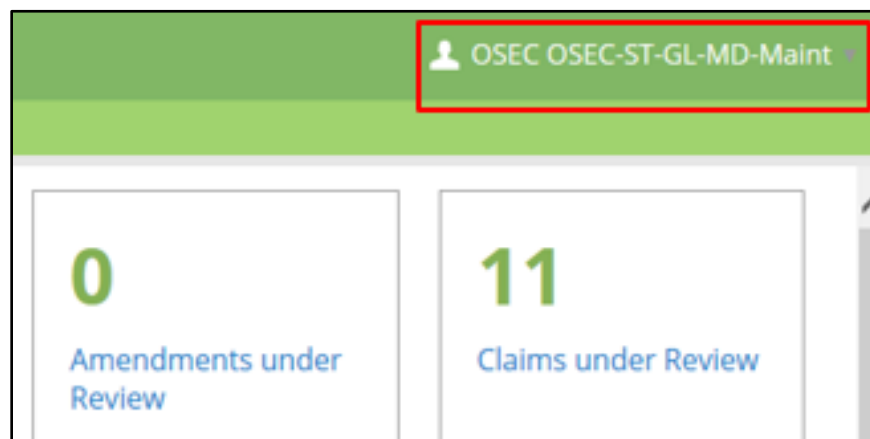
This section describes how to switch to the **Reviewer** role [for users who also have the Grants Administrative Officer (GAO), Grants Processor (GP), or Signatory Official (SO) role] and how to navigate the ezFedGrants External Portal as a Reviewer.

Switching Roles

If you have both the **Reviewer** role and a primary role [Grants Administrative Officer (GAO), Grants Processor (GP), or Signatory Official (SO)] in the ezFedGrants External Portal, you must switch to the **Reviewer** role in order to access panel-related work items and functionalities. The following procedure describes how to switch roles.

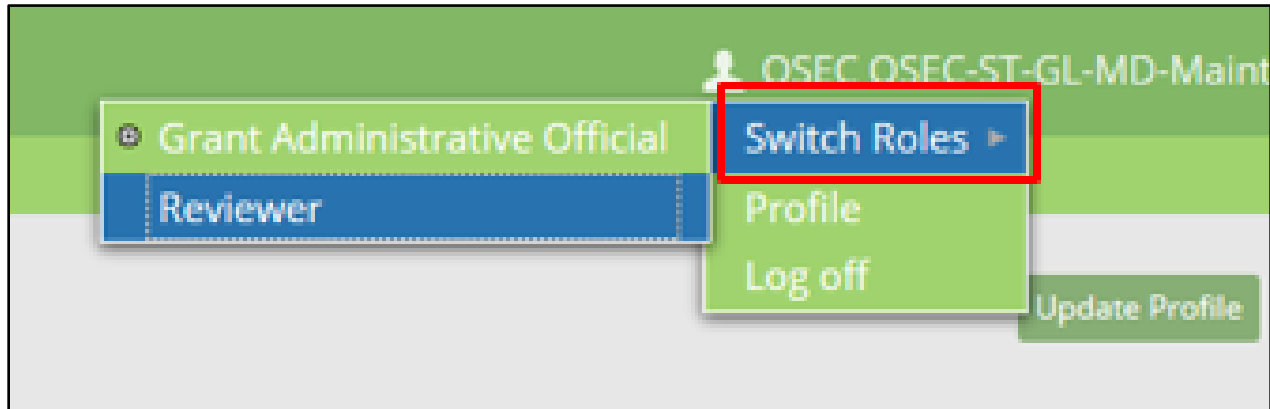
If you **only** have the **Reviewer** role, you do not need to switch roles. Please proceed to the subsequent subsection of this document.

1. From any screen in the ezFedGrants External Portal, click your user name in the upper right corner of the screen to display the **Username** dropdown menu.



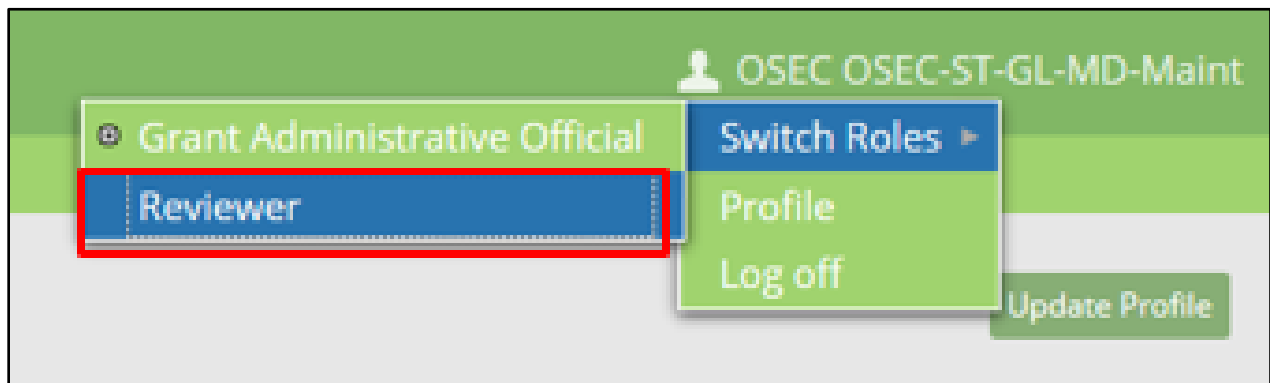


2. Click the **Switch Roles** option to view the **Switch Roles** dropdown menu.



3. Click the **Reviewer** option to switch to the Reviewer role. This will reload the ezFedGrants External Portal to display the **Reviewer Home** screen.

Note: Repeat this procedure to switch back to your primary role. While you are in the **Reviewer** role, you will not have access to work items, functionalities, etc. associated with your primary role.



Reviewer Navigation

The **Reviewer Home** screen is very similar to the default **Home** screen, in that there are action tiles, the navigation menu, and the **News and Notes** section. The primary difference is that there are fewer action tiles and navigation menu options, because while in the **Reviewer** role, you only have access to Application Review Panel (ARP) process-related work items, functionalities, etc.

The **Actionable Items** tile contains all ARP-related work items assigned to you. It is recommended to review the contents of the **Actionable Items** tile frequently to ensure work items are not missed.

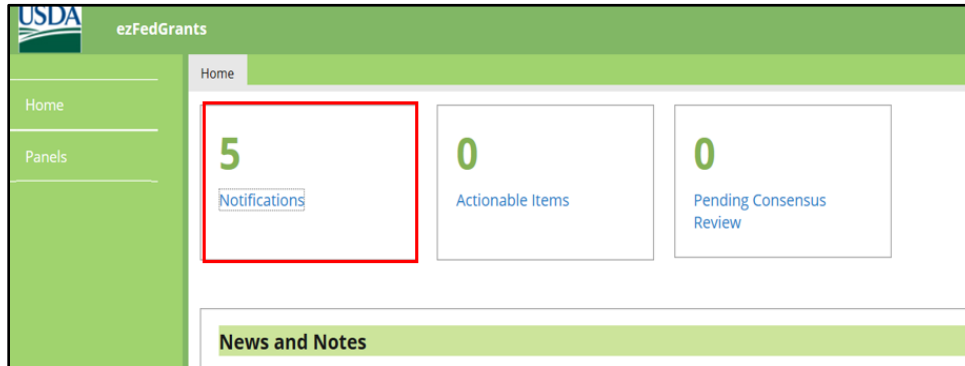
The **Pending Consensus Review** tile allows you to view applications that are pending consensus review and, in some cases, to access Consensus Review-related work items.



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The **Notifications** tile provides read-only messages, status updates, and work item notifications on panels you are assigned to and ARP processes you are currently participating in. This tile **only** displays copies of various notification messages. You **cannot** access or take action on work items through this tile. Work items must be accessed through the **Actionable Items** or (in some cases) the **Pending Consensus Review** tiles.



When you click the **Notifications** tile, the **Notifications for Past 90 Days** popup window will appear where you can view ARP-related messages that have been sent to you in the last 90 days.

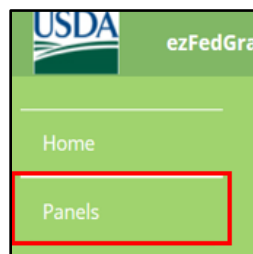
Click the small arrow in the title cell of any applicable columns to access sort and filter options.

To view a notification message click the **View Message** link. Once a message is viewed, the icon in the **View** column will change from an envelope to a check mark.

To view notifications older than 90 days, click the **View All Notifications** link at the bottom of the **Notifications for Past 90 Days** popup window.

Transaction	Transaction	Status	Sent	View
Application	APHIS-APP-256	Considered	8/11/16	View Message
Application	APHIS-APP-252	Considered	8/11/16	View Message
Application	APHIS-APP-251	Considered	8/10/16	View Message
Application	APHIS-APP-248	Considered	8/10/16	View Message

The **Panels** link in the navigation menu allows you to view information on panels you are assigned to.





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Comments

Additional Information

Refer to the following additional materials as found under the **Training** tab of the [NFC ezFedGrants website](#):

- Onboarding Summary - ezFedGrants External User Onboarding Summary Quick Reference
- USDA eAuthentication Level 2 Account Creation Job Aid
- ezFedGrants External Portal User Role Definitions Quick Reference
- ezFedGrants External Portal Access Request Submission Job Aid
- ezFedGrants External Portal User Profile Management Job Aid
- ezFedGrants External Portal Search Functionalities Job Aid

Version Control

Name	Date	Changes Made
Accenture Federal	9/13/2016	Initial Document Created
April Murphy	3/13/2017	<p>Comments: Added subsection headings; added version control table</p> <p>Purpose: Clarified information throughout; corrected contents in introductory paragraph</p> <p>Procedure: Added subsection headings; reorganized some information; clarified information throughout; removed steps which were duplicated from other job aids or sections</p> <p>Throughout: Corrected footer formatting; improved 508 alt text & image descriptions</p>
April Murphy	4/4/2017	<p>Purpose: Added Helpful Hint re: X Button and recommended browser; Corrected a formatting issue in Helpful Hints subsection.</p> <p>Procedure: Added information on zooming in/out to Navigation Menu subsection.</p>
April Murphy	5/16/2017	<p>Purpose: Added table of contents, removed Prerequisites and Menu Path because this document begins with the most basic onboarding information; Updated Helpful Hints</p> <p>Procedure: Accessing the External Portal: Added additional onboarding details; Removed "Checking Application Statuses": Moved information to Application Management Job Aid; Removed "Introduction to Searching": Moved information to External Portal Search Functionality Job Aid</p> <p>Throughout: Updated document title, header, & footer</p>
April Murphy	7/7/2017	<p>Purpose: Updated intro, updated helpful hints</p> <p>Procedure: Navigation & Basics for All Users: Added that only one user can access/edit a work item/business object at a time; Added lack of historical agreement data. Nav & Basics for Reviewers: General clarification & improvement of information throughout.</p> <p>Comments: Updated Additional Information section</p>