



ezFedGrants External Portal Access Request Review Job Aid



Purpose

This job aid provides details on approving or rejecting ezFedGrants External Portal access requests for External Users (non-USDA individuals, such as grants staff at recipient/cooperator organizations).

Trigger

Perform this procedure when an individual has submitted an access request for the ezFedGrants External Portal.

Prerequisites

- Access to the ezFedGrants External Portal
- The Grants Administrative Officer (GAO) Role

Menu Path

Use the following menu path to begin this procedure:

- [Launch ezFedGrants](#) > [eAuthentication](#) > [ezFedGrants External Portal](#)

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

- Some Internet browsers may fail to display the X button on certain popup windows. The functionality for this button is still present in the system, but the icon is not visible. Please try clicking in the area where the X button should be displayed (usually the upper right corner of the window header), or try using another Internet browser (Internet Explorer 10 is recommended).
 - This guidance applies for other buttons, icons, etc. that may not appear correctly in unsupported browsers.
- 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.

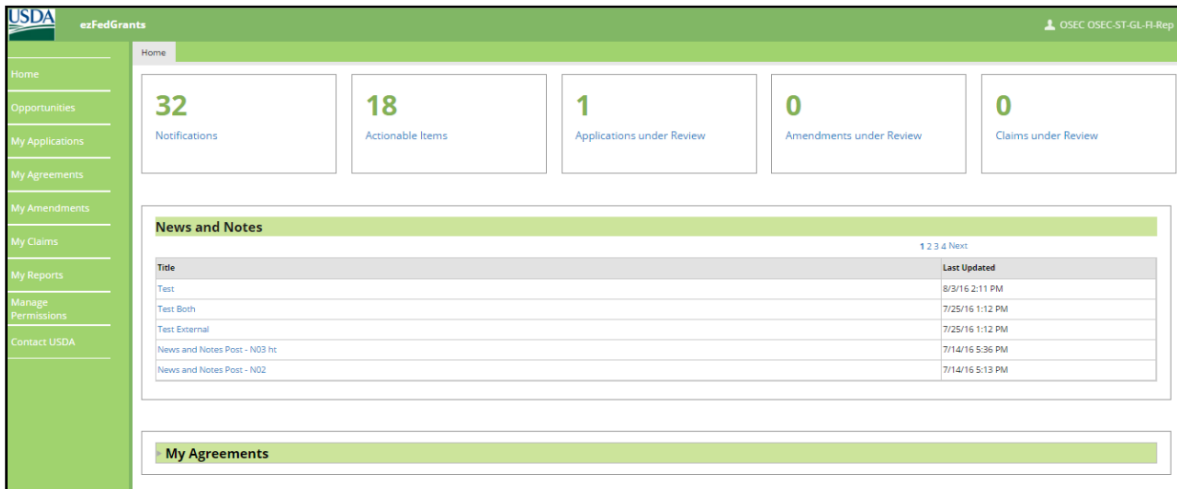


ezFedGrants External Portal Access Request Review Job Aid



Procedure

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



2. Click the **Actionable Items** tile and locate the access request in the **Actionable Items for Past 90 Days** popup window.

Click the **Request ID** to open the **Request Access** screen and review the access request.





ezFedGrants External Portal Access Request Review Job Aid



- Once you have reached the **Request Access** screen, review the information on the **Role Selection**, **Organization**, and **Personal Information** tabs. If any of the information on these tabs is incorrect, select the **Reject** option in the next step.
- Once you have reviewed the information and are ready to accept or reject the request, locate the **DECISION** section and click the **Please select an option** field.

Note: Please ensure the user has selected the correct organization before proceeding. This is best verified by confirming the DUNS number and/or CRM Organization ID number. If an access request is approved with the incorrect organizational association, the only way to rectify this is to deactivate the user's access and have the user submit a new access request.

The screenshot shows the 'Request Access (RA-522)' interface. At the top right are 'Print' and 'Close' buttons. The status is 'Submitted to APHIS'. Below this is a 'DECISION:' section with a dropdown menu that says 'Please select an option'. A red box highlights this dropdown. Below the dropdown is a 'Request Access' section with tabs for 'Role Selection', 'Organization', and 'Personal Information'. Under 'Role Selection', there is a list of roles: 'User Role' and 'Grant Administrative Officer'. A larger red box highlights the 'DECISION:' section and the dropdown menu.

- Based on your assessment of the information in the access request, click the appropriate option from the **Please select an option** dropdown menu. Once an option is selected, additional fields will appear related to your decision.

To approve the request: Click the **Accept** option and proceed to step 6 of this document.

To reject the request: Click the **Reject** option and proceed to step 12 of this document.

This screenshot is similar to the previous one but shows the 'DECISION:' dropdown menu expanded. It now displays three options: 'Please select an option' (highlighted with a red box), 'Accept' (in a blue button), and 'Reject' (in a white button). The 'Request Access' section below is partially visible.



ezFedGrants External Portal Access Request Review Job Aid



- If you are approving the request, locate the **Role Selection** section, and click the **User Role** field. Select the appropriate role to assign to the user from the **User Role** dropdown menu.

Note: You may change a user's role at any time after they are granted access to the External Portal by clicking the **Manage Permissions** tile on the left-hand navigation menu. Please refer to the **ezFedGrants External Portal User Role Management Job Aid** for more information on managing user roles and access.

Request Access (RA-522)

Role Selection

* User Role

- Scroll down to the **Contact Details** section and click the **Find Contact** button to open the **Find Contact** popup window.

At this stage, you will complete a search to check for any existing record of this individual in the ezFedGrants System.

If a record exists: You will link the existing record with their External Portal account.

If a record does not exist: Leave this section blank. Linking to a record is not required. If a user does not have a record, a record will automatically be created once the access request is fully approved.

Contact Details

Please search for the contact information of the user requesting access.

- Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request.
- If the user is aligned with the correct organization, use the "Find Contact" button to determine if the user already has a contact record created on approval.

First Name	<input type="text" value="LAURA"/>
Last Name	<input type="text" value="KAVANAUGH"/>
City	<input type="text" value="slidell"/>
State	<input type="text" value="LA"/>
Phone	<input type="text" value="(504) 555-1212"/>
Email	<input type="text" value="laura.kavanaugh@nfc.usda.gov"/>



ezFedGrants External Portal Access Request Review Job Aid



- In the **Find Contact** popup window, complete at least one **Search Criteria** field.

Note: To view all users in your organization with a record (the broadest possible search), type a single asterisk (*) into any one field and leave all other fields blank.

Find Contact

Organization FMMI Lab 1

First Name	<input type="text"/>
Last Name	<input type="text" value="Doe"/>
Email Address	<input type="text"/> ?
CRM Business Partner ID	<input type="text"/>

- Click the **Search** button.

Find Contact

Organization FMMI Lab 1

First Name	<input type="text"/>
Last Name	<input type="text" value="Doe"/>
Email Address	<input type="text"/> ?
CRM Business Partner ID	<input type="text"/>



ezFedGrants External Portal Access Request Review Job Aid



10. Review the **Search Results** table to confirm if any of the retrieved records are a match.

Matching Record Found: Link the record with the External Portal profile (which you are currently approving) by clicking the **Select Contact** link. This link is not pictured in the below screenshot.

The system will display a warning message if you select a record that does not match the first and last name of the individual who has submitted the access request.

No Matching Record Found: Simply close the **Find Contact** popup window by clicking the **X** button in the upper right corner (as indicated in the screenshot below). A new contact record will automatically be created in the ezFedGrants Internal Portal once you finalize your approval of the access request.

Note: Some Internet browsers may not display the **X** button image. In many cases the functionality of this button is still available, but the icon will not appear. Please try closing the **Find Contact** popup window by clicking the area of the screen where the **X** button image would normally appear (indicated by the red arrow in the screenshot below), or try using a different Internet browser. Internet Explorer 10 is the recommended browser for using the ezFedGrants External Portal.

First Name	Last Name	Email Address	City	State	CRM Business Partner
------------	-----------	---------------	------	-------	----------------------



ezFedGrants External Portal Access Request Review Job Aid



11. Review the **Contact Details** section of the **Request Access** screen to ensure it is correct.

- **No Matching Record Found:**
 - The **Contact Details** fields should be blank.
 - If you have mistakenly selected a record, you can clear your selection by clicking the **Clear Contact Selection** button.
- **Matching Record Found:**
 - Ensure you have selected the correct record by confirming the information from the following three sections is generally congruent:
 - The **Search Results** table in the **Find Contact** popup window
 - The **Your Contact Details** section of the **Request Access** screen
 - The **Personal Information** tab of the **Request Access** screen.
 - If you have selected the incorrect record from the search results, click the **Find Contact** button again to repeat the search.

Contact Details

Please search for the contact information of the user requesting access.

- Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request.
- If the user is aligned with the correct organization, use the "Find Contact" button to determine if the user already has a contact record created on approval.

First Name	LAURA
Last Name	KAVANAUGH
City	slidell
State	LA
Phone	(504) 555-1212
Email	laura.kavanaugh@nfc.usda.gov



ezFedGrants External Portal Access Request Review Job Aid



- Whether you are approving or rejecting the access request, provide comments relevant to your decision into the available text box, which will be labeled either **Acceptance Comments** or **Rejection Comments**.

Request Access (RA-522) Print Close

Status: Submitted to APHIS

DECISION:

Please select an option

Accept

Acceptance Comments

This user is a Grants Administrative

- Click the **Submit** button to finalize the approval/rejection.

Request Access (RA-522)

Status: Submitted to APHIS

DECISION:

Please select an option



ezFedGrants External Portal Access Request Review Job Aid



14. If the acceptance/rejection is successful, the system will display a confirmation message.

If there are any issues, an error message will be displayed.

Note: If the user's access request was rejected, the user will need to create and submit a new access request.

Request Access (RA-522) Print Close

Status: Approved

Access Request RA-522 has been approved.

Request Access

Role Selection Organization Personal Information Comments

Role Selection

* User Role	Grant Administrative Officer
* Agency	APHIS



ezFedGrants External Portal Access Request Review Job Aid



Comments

Additional Information

Refer to the following additional materials:

- ezFedGrants External Portal Onboarding and Basics Job Aid
- Onboarding and Accessing ezFedGrants FAQs
- ezFedGrants External Portal User Role Definitions
- ezFedGrants External Portal User Role Management Job Aid

Version Control

Name	Date	Changes Made
April Murphy	Prior to 2/22/2017	Initial document created
April Murphy	2/22/2017	Comments: Added version control table, updated Additional Information; Procedure: Added additional clarifying information on contact search Purpose: Added a helpful hint reference to troubleshooting overwritten contact records and incorrect organizational associations Throughout: Revised information to apply to both internal and external users
April Murphy	3/2/2017	Throughout: Clarified information throughout; Clarified and improved 508 alt text and descriptions for some images Procedure: Added Note to step 9 and 12. Added information to Note for step 14.
April Murphy	4/4/2017	Purpose: Clarified Helpful Hint on X button & recommended browser. Procedure: Step 2 – Added Note about zooming Step 10 – Clarified recommended browser in Note .
April Murphy	5/9/2017	Procedure: Updated step 7, 10, & 11 based on updates to the Find Contact search & related screens. Removed confirmation email information from Note on step 14.
April Murphy	5/16/2017	Procedure: Added Launch ezFedGrants link to Menu Path. Comments: Corrected document title
April Murphy	5/19/2017	Procedure: Step 2: Added content to address both internal and external worklists. Removed a step that related only to internal user worklists (combined this information into Step 2).
Takia Glover	9/13/2017	Comments: Updated document title
April Murphy	11/1/2017	Removed all content specific to Internal Users