



ezFedGrants External Portal User Profile Management Job Aid



Purpose

This job aid provides details on your ezFedGrants External Portal user profile, including updating your profile and indicating your availability for participation in Application Review Panels.

Contents

- Purpose**..... 1
 - Contents..... 1
 - Trigger..... 1
 - Prerequisites..... 1
 - Menu Path..... 1
 - Helpful Hints..... 2
- Procedure**..... 3
 - Accessing Your User Profile..... 3
 - Editing Your Profile..... 4
 - Toggle Application Review Panel Participation..... 6
- Comments**..... 8
 - Additional Information..... 8
 - Version Control..... 8

Trigger

Perform this procedure when you need to update your ezFedGrants External Portal profile information or change your availability for participation in Application Review Panels.

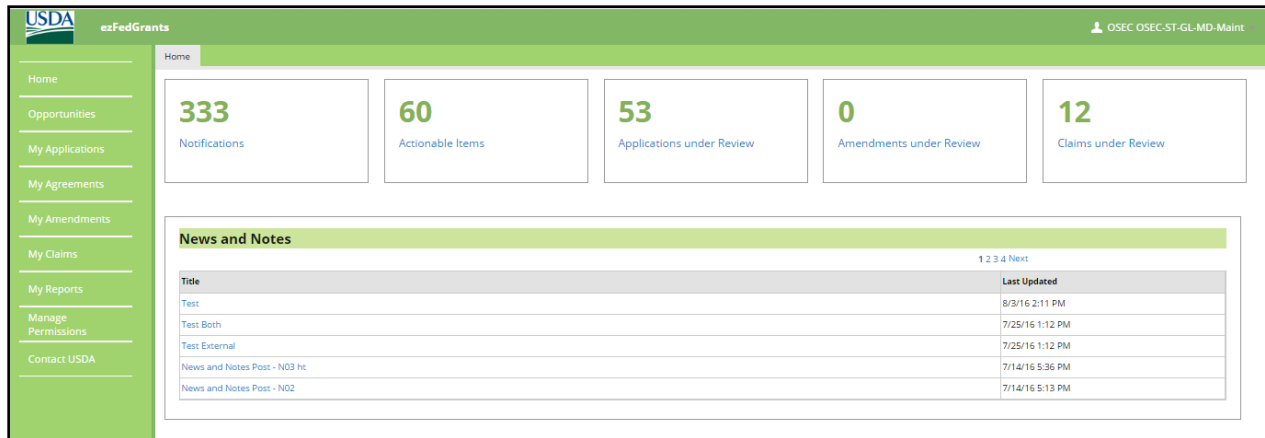
Prerequisites

- Access to the ezFedGrants External Portal

Menu Path

Use the following menu path to begin this procedure:

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





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.

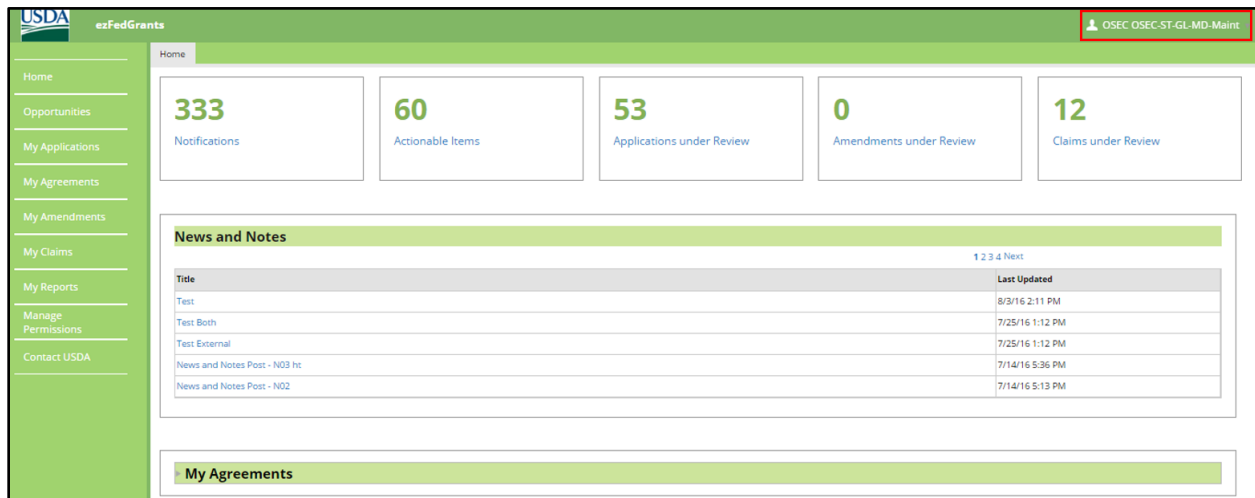


Procedure

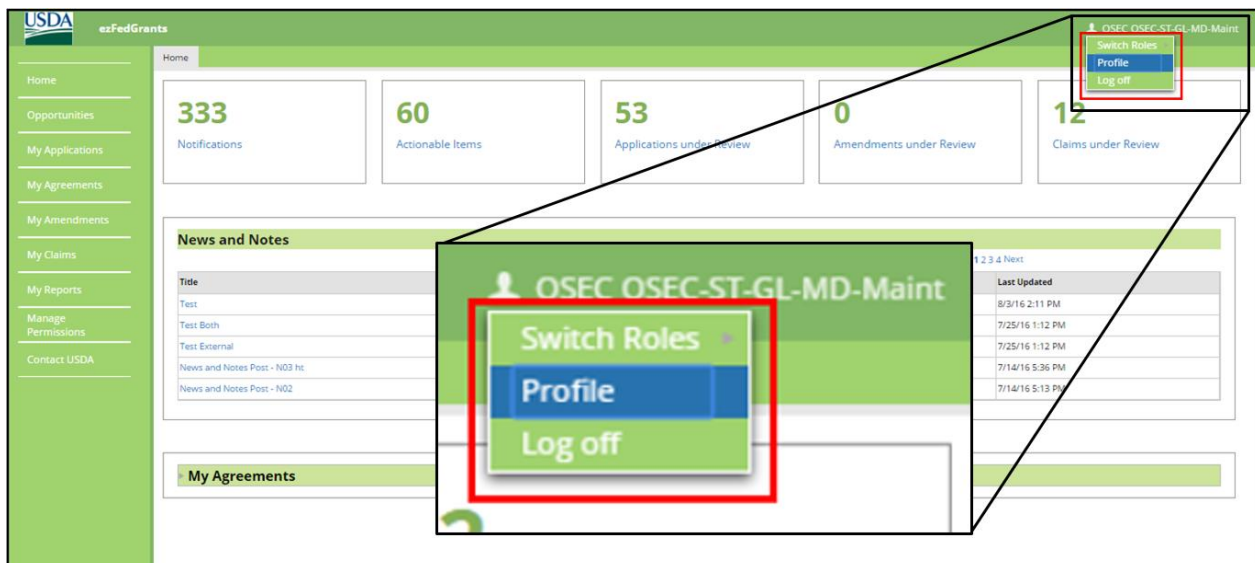
Accessing Your User Profile

1. Click your username in the top right corner of any ezFedGrants External Portal screen.

Note: The screenshot below uses the **Home** screen as an example, but you can access your profile from anywhere in the ezFedGrants External Portal.



2. Click the **Profile** option from the **Username** dropdown menu. This will open the **User Profile** screen.





Editing Your Profile

This section describes how to update the information on your ezFedGrants External Portal profile. If you update any of the information in the **General Details** section, please contact Agency representatives for all active Agreements you are currently involved with to ensure that your information is updated internally as well.

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

The screenshot shows the 'User Profile' page for 'OSEC OSEC-ST-GL-MD-Maint'. It includes a checkbox for 'I want to be considered as a Reviewer for future Panels' which is checked. The profile is divided into two sections: 'General Details' and 'Contact Details'. The 'Update Profile' button is highlighted with a red box and a callout line pointing to a larger 'Update Profile' button in a separate box.

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	1944
City	Washington

2. The **Edit Operator Profile** popup window will appear when you click the **Update Profile** button. Scroll along the window to view and edit all sections of your User Profile.

The 'Edit Operator Profile' popup window shows the same profile information as the main page, but with input fields for editing. The 'General Details' section includes fields for CRM Business Partner ID, Title, First Name, Last Name, Telephone, and Email. The 'Contact Details' section includes fields for Street, House Number, City, State, and Zip.

General Details	
CRM Business Partner ID	<input type="text" value="1800001888"/>
Title	<input type="text" value="Mr."/>
First Name	<input type="text" value="OSEC"/>
Last Name	<input type="text" value="OSEC-ST-GL-MD-Maint"/>
Telephone	<input type="text" value="(111) 234-5678"/>
Email	<input type="text" value="raj.joshi@accenture.com"/>

Contact Details	
Street	<input type="text" value="K ST NW"/>
House Number	<input type="text" value="1944"/>
City	<input type="text" value="Washington"/>
State	<input type="text" value="District of Columbia"/>
Zip	<input type="text" value="20006"/>



ezFedGrants External Portal User Profile Management Job Aid



- When you have made all desired changes, click the **OK** button to save your changes and close the **Edit Operator Profile** popup window.

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

The screenshot shows a window titled "Edit Operator Profile" with a close button (X) in the top right corner. The window contains a form with the following fields: 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. Below the form, there are two buttons: "OK" and "Cancel". A red box highlights these two buttons. A callout box also highlights the "OK" and "Cancel" buttons at the bottom of the window.

- The **User Profile** screen will refresh to display the updated information. You can scroll along the **User Profile** screen to confirm that your changes have been applied.

The screenshot shows a user profile page. At the top right, there is a green "Update Profile" button. The main content area is titled "OSEC OSEC-ST-GL-MD-Maint". Below this, there is a checkbox labeled "I want to be considered as a Reviewer for future Panels" which is checked. The profile is divided into two sections: "General Details" and "Contact Details".

General Details	
CRM Business	1800001888
Partner ID	
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



Toggle Application Review Panel Participation

1. Willingness to participate in Application Review Panels must be indicated on your ezFedGrants External Portal User Profile by checking the **I want to be considered as a Reviewer for future Panels** checkbox, located in the upper-right corner of the **User Profile** screen.

You can also withdraw your willingness to participate in Application Review Panels by unchecking this box.

The screenshot shows the 'User Profile' screen for 'OSEC OSEC-ST-GL-MD-Maint'. In the upper right corner, there is a green 'Update Profile' button. Below it, the checkbox 'I want to be considered as a Reviewer for future Panels' is checked. A red box highlights this checkbox, and a callout line points to a larger red-bordered box containing the text 'I want to be considered as a Reviewer for future Panels' with a checked checkbox icon.

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

2. Click the **Update Profile** button to save the checkbox.

The screenshot shows the 'User Profile' screen for 'OSEC OSEC-ST-GL-MD-Maint'. The checkbox 'I want to be considered as a Reviewer for future Panels' is now unchecked. A red box highlights the green 'Update Profile' button in the top right corner, and a callout line points to a larger red-bordered box containing the text 'Update Profile'.

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

Street	K ST NW
House Number	1944
City	Washington



ezFedGrants External Portal User Profile Management Job Aid



3. At this point, if you have **checked** the checkbox, you will be granted the **Reviewer** role (if you did not already have this role, see **Note** below), the **Reviewer Profile** section will be added to your User Profile, and the **Edit Operator Profile** window should appear so that you can provide information for the **Reviewer Profile** section.

Note: If you have **unchecked** the checkbox, the **Reviewer Profile** section will be removed your User Profile, but you will retain the Reviewer role. This role is retained so that you can view and access work items and information for any Panels you participated in historically or that you are currently participating in. However, your name will not appear in the list of available Panel Members for Panel Managers creating new panels or beginning new Application Review Panel assignments.

Edit Operator Profile

▼ Reviewer Details

Highest Education: BA

Degree Area: [Text Field]

Professional Title/Rank: Assistant Professor

Organization Type: Academia

Institution Type: 1862 Land-grant university

Percentage of Appointment:

- % Research: [Text Field]
- % Teaching: [Text Field]
- % Extension / Outreach: [Text Field]
- % Administration: [Text Field]

Department/Unit: [Text Field]

Gender: Male

Race:

- American Indian or Alaska Native
- Asian



Comments

Additional Information

Refer to the following additional materials:

- ezFedGrants External Portal Access Request Submission Job Aid
- ezFedGrants External Portal Onboarding and Basics Job Aid
- ezFedGrants External Portal User Role Definitions

Version Control

Name	Date	Changes Made
April Murphy	Prior to 2/20/2017	Initial Document Creation
April Murphy	3/10/2017	Comments: Added subsection headings; added version control table Purpose: added information specific to internal users Procedure: cropped some images to improve visibility Throughout: Improved 508 alt text and image descriptions; corrected document properties; corrected footer formatting; clarified information throughout
April Murphy	5/16/2017	Purpose: Added Contents; Added Launch ezFedGrants link to Menu Path Procedure: Added subsection headings; Editing Your Profile: Added step 4 (confirming changes); corrected 508 text where applicable Comments: Corrected document title
April Murphy	5/26/2017	Procedure: Editing Your Profile: Added introduction
April Murphy	11/2/2017	Updated entire document by removing Internal User-specific information. Internal User information has been converted to HTML. Removed duplicated information from Toggle Application Review Panel section.