



ezFedGrants External Portal User Role Management Job Aid

Purpose

This job aid provide details for Grants Administrative Officers (GAOs) of external organizations (recipients, cooperators, etc.) on modifying user roles and deactivating user access for users within your organization.

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Trigger

Perform these procedures when you need to modify a user’s ezFedGrants External Portal role or deactivate a user’s access.

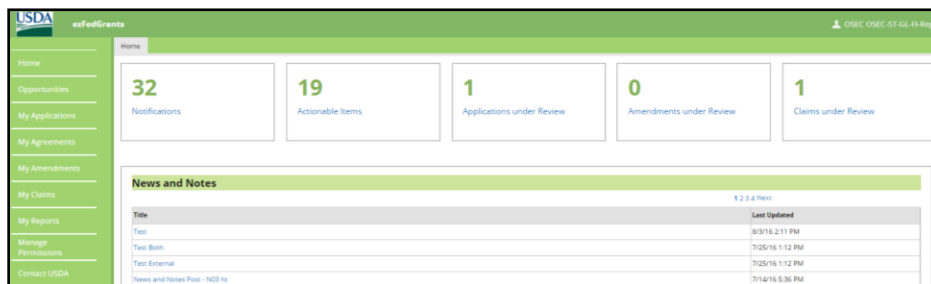
Prerequisites

- You must have the Grants Administrative Officer (GAO) role in 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

- GAOs cannot modify their own role or access. If you are a GAO and you need your role or access changed:
 - Another GAO from your organization can make modifications to your role/access.
 - If you are the only GAO, you must assign another user to the GAO role. This new GAO may then modify your role/access as necessary.
- 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.

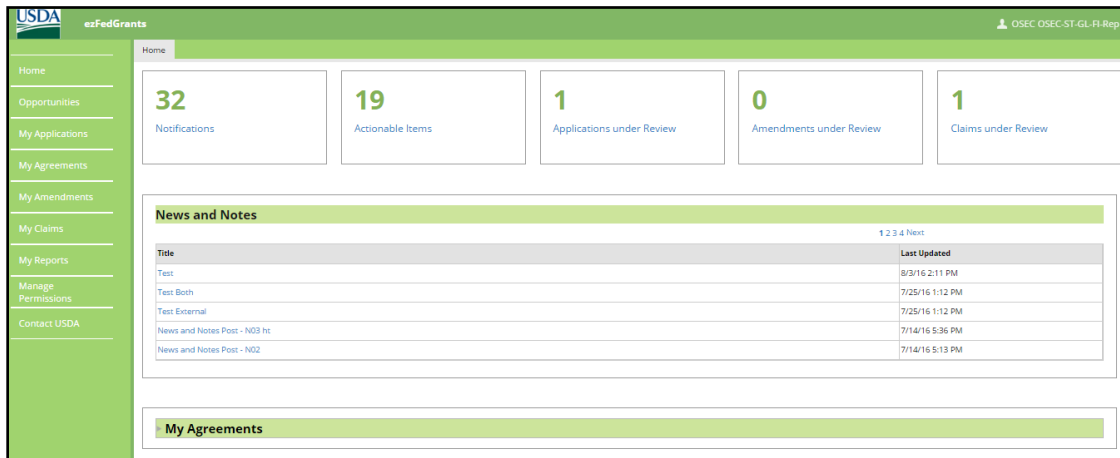
Note: Data used in this procedure is a representative sample for the purpose of training. Actual data in the system may vary based on agency and scenario.



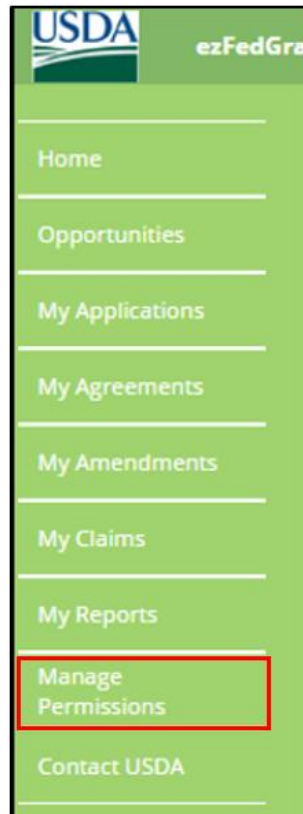
Procedure

Accessing the Manage Permissions Screen

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



2. Click the **Manage Permissions** tile to open the **Manage Permissions** screen.





3. On the **Manage Permissions** screen, enter information into the **Search Criteria** 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' interface. Under the 'Search Criteria' heading, there are three input fields: 'Name' (a text box with a search icon), 'User ID' (a text box), and 'Role' (a dropdown menu with 'Select...' selected). Below these fields are two green buttons: 'Search' and 'Clear'. A red rectangular box highlights the 'Name', 'User ID', and 'Role' fields.

4. Once you have entered your search criteria, click the **Search** button.

This screenshot shows the same 'Manage Permissions' interface. The 'Role' dropdown menu is now set to 'Grant Processor'. The 'Search' button is highlighted with a red rectangular box.



Changing Roles & Deactivating Access

Changes to user access and roles are made directly on the **Search Results** table of the **Manage Permissions** screen.

Note: Grants Administrative Officers (GAOs) **cannot** change their own role or deactivate their own access. If you are area GAO:

- Another GAO can change your role or deactivate your access for you.
- If you are the only GAO, you must assign another user to the GAO role. The new GAO can then change your role or deactivate your access.
- If you are the only user for your organization, you cannot have any other role than GAO. If you need your access deactivated, you must contact the Help Desk.

Manage Permissions

Search Criteria

Name

User ID

Role

Search Results

Name	User ID	Role	Options
NASS NASS-ST-FM-BUD-Cord	28200907270011146168664	<input type="text" value="Grant Processor"/>	<input type="button" value="Change"/> <input type="button" value="Deactivate"/>
OSEC OSEC-ST-PP-FACT-Proc	28200907280011827439014	<input type="text" value="Grant Processor"/>	<input type="button" value="Change"/> <input type="button" value="Deactivate"/>



Changing Roles

Please use caution when changing roles. Work items assigned to the user based on his/her previous role may be lost when the user's role is changed.

1. To change a user's role, select the new role from the dropdown menu in the **Role** column, and click the **Change** button to apply the role change.

Manage Permissions

Search Criteria

Name

User ID

Role

Search Results

Name	User ID	Role	Options
NASS NASS-ST-FM-BUD-Cord	28200907270011146168664	<input type="text" value="Grant Processor"/>	<input type="button" value="Change"/> <input type="button" value="Deactivate"/>
OSEC OSEC-ST-PP-FACT-Proc	28200907280011827359014	<input type="text" value="Grant Administrative Officer"/>	<input type="button" value="Change"/> <input type="button" value="Reactivate"/>

2. A small popup window will appear asking you to confirm your change. Click the **OK** button to save your change. Click the **Cancel** button if you do not wish to make this change.

Change Complete

You are about to change access for user OSEC OSEC-ST-PP-FACT-Proc ; The new role is Grantor:GrantAdministrativeOfficer . If you wish to continue, please press OK otherwise, press cancel.

3. To confirm your change was applied, you will need to close and reopen the **Manage Permissions** screen. Click the **X** button in the gray header to close the **Manage Permissions** screen. Then repeat procedure described in the **Accessing the Manage Permissions Screen** section.



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Deactivating Access

Use caution when deactivating user access. All work items assigned to a user will be frozen or lost when the user's access is deactivated. Please ensure all work items are completed or assigned to another user (if possible) **before deactivating access**. If the user is unable to complete the work items, you may need to contact the Help Desk for assistance reassigning or cancelling the work items.

Deactivating ezFedGrants External Portal access will not deactivate the user's eAuthentication Level 2 Account. The user may submit a new ezFedGrants External Portal access request after her/his access has been deactivated.

You may need to deactivate a user access when:

- A user is no longer affiliated with your organization and therefore should no longer have access to the ezFedGrants External Portal under your organization ID.
- The incorrected ezFedGrants Internal Portal contact record was selected when the user's access request was approved.
- A user was linked to the wrong organization ID during access request approval.
 - Currently, external users can only be linked to one organization ID (i.e. DUNS) at a time. In practice this means users can only complete actions in the ezFedGrants External Portal related to a single organization ID.

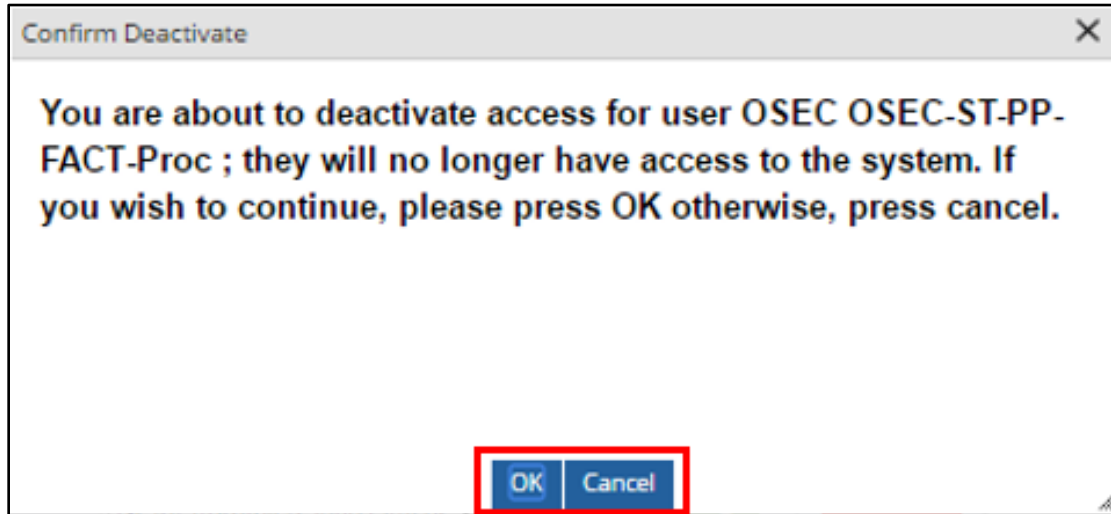
1. If you need to deactivate a user's access to the ezFedGrants External Portal, click the **Deactivate** button.

The screenshot shows the 'Manage Permissions' interface. It includes a 'Search Criteria' section with fields for Name, User ID, and Role (set to 'Grant Processor'), and 'Search' and 'Clear' buttons. Below is a 'Search Results' table with two rows. The first row shows a user with role 'Grant Processor' and a 'Deactivate' button. The second row shows a user with role 'Grant Administrative Officer' and a 'Deactivate' button. Both 'Deactivate' buttons are highlighted with red boxes. A callout box with a red border and the word 'Deactivate' in white text points to the 'Deactivate' button in the second row.

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



2. Once you click the **Deactivate** button, a small popup window will appear asking you to confirm the deactivation. Click the **OK** button to finalize the deactivation. Click the **Cancel** button if you do not wish to deactivate the user's access.



3. To confirm the deactivation was applied, you will need to close and reopen the **Manage Permissions** screen. Click the **X** button in the gray header to close the **Manage Permissions** screen. Then repeat steps in the **Accessing the Manage Permissions Screen** section.



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Comments

Additional Materials

Refer to the following additional materials:

- ezFedGrants External Portal Access Request Submission Job Aid
- ezFedGrants External Portal Access Request Review Job Aid
- ezFedGrants External Portal Onboarding and Basics Job Aid
- Onboarding and Accessing ezFedGrants FAQs

Version Control

Name	Date	Changes Made
April Murphy	Prior to 02/15/2017	Initial Document Created
April Murphy	2/15/2017	Throughout: Removed text duplicated in other documents. Corrected used of heading styles, and corrected document title and author. Comments: Added Version Control table
April Murphy	3/2/2017	Comments: Updated referenced job aid titles Throughout: Generally clarified text throughout; Corrected author and title in document properties; Updated header/footer Purpose: Added Helpful Hint on modification of GAO roles Procedure: Added deactivation details to step 8
April Murphy	5/16/2017	Purpose: Added Contents; Added Launch ezFedGrants link to Menu Path Procedure: Added subsection headings; Changing & Deactivating section: added intro information; Changing Roles subsection: added Step 3 (confirm change); Deactivating Access subsection: added Step 3 (confirm deactivation); Corrected 508 text where applicable Comments: Corrected document title
Takia Glover	9/13/2017	Comments: Updated document title