ezFedGrants Administrative Reports
Job Aid

Before You Begin

This document explains how Grants Administrative Officers (GAOs) can run administrative reports in ezFedGrants.

The **Organization User Report** displays the name, user role, and organization(s) for all users within the GAO's organization(s). This allows the GAO to review information such as which users have which role, how many users there are of each role, and which users are associated with which specific organizations.

The **Work Item Management Report** displays information about applications, claims, financial/performance reports, repayment requests, and agreements that are awaiting action by the organization or have been submitted to an agency. This report allows the GAO to track the status of work items and see who is assigned to which work items.

You Will Need
- An eAuthentication Verified Identity Account
- The Grants Administrative Officer (GAO) role in ezFedGrants

Contents

Data Note

The screenshots provided with these instructions are a representative sample for the purpose of training, which contain sample data and may not depict the entire screen.

In addition, these instructions focus on the **minimum system requirements** for the above-described procedure(s). You may need to complete additional fields or provide additional information not specifically described in this document.
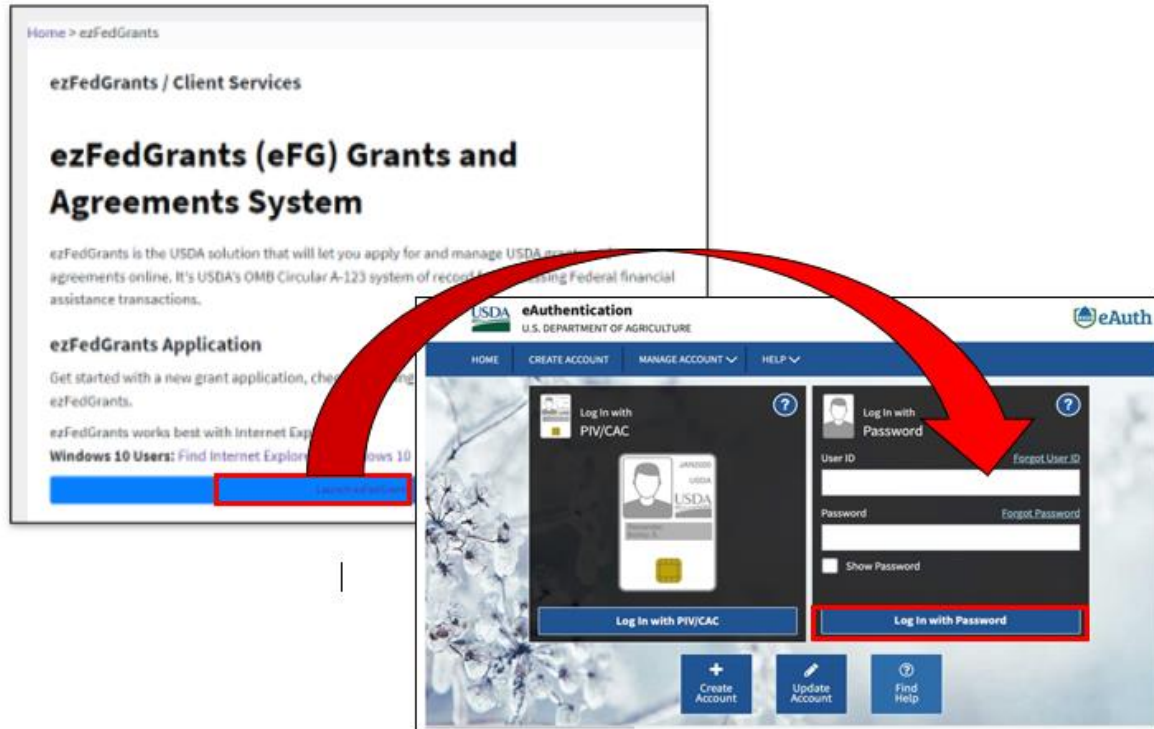
![USDA logo]

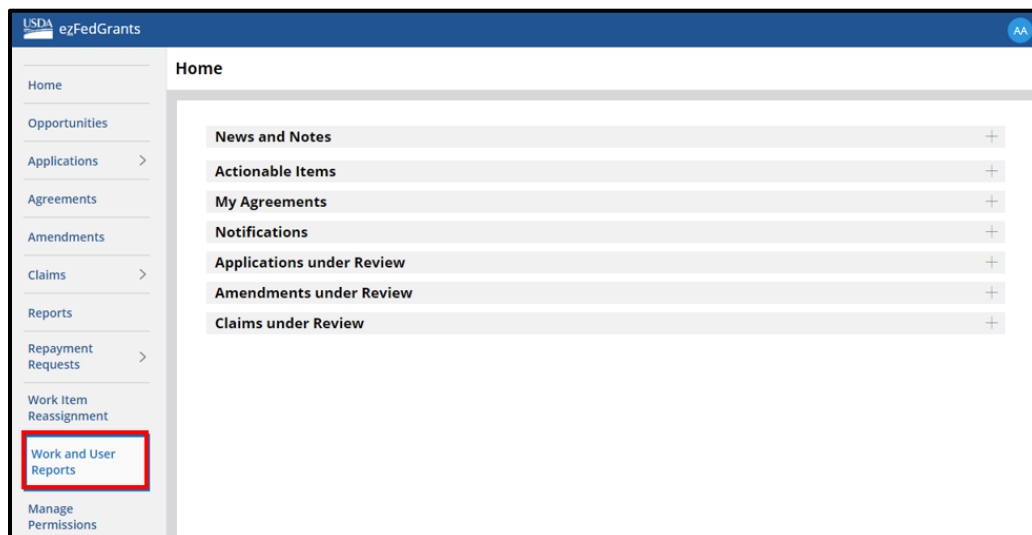**ezFedGrants Administrative Reports**
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Getting Started

Launch the ezFedGrants External Portal from the OCFO ezFedGrants website and log in with your eAuthentication Verified Identity Account.

For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the Onboarding and Accessing ezFedGrants FAQs located on the OCFO ezFedGrants website.

Running Reports

1. From the **ezFedGrants External Portal Home** screen, click the **Work and User Reports** tile to open the **User Reports** screen.

2. Follow the directions below for the report you wish to run:
   - **Organization User Report:** Simply click **Organization User Report** in the **Report title** column to open the **Organization User Report** screen.
   - **Work Item Management Report:** You can only run this report for one agency at a time. Select an agency from the **Agency Selection** dropdown menu at the top of the **User Reports** screen and then click **Work Item Management Report** in the **Report title** column to open the **Work Item Management Report** screen.

3. The relevant data will be displayed on the **Organization User Report** or **Work Item Management Report** screen.

   Note: The reports will include information for all organization IDs you are affiliated with in ezFedGrants. Please refer to the **Working with Multiple Organizations in ezFedGrants Quick Reference** for more information.

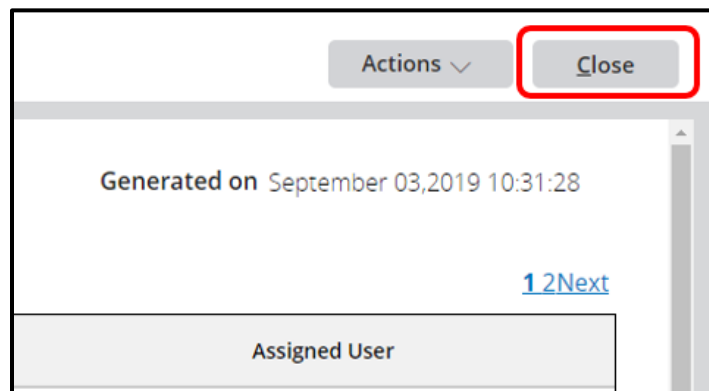4. Click the **Actions** button to refresh or export the report.

   Note: Exported reports are static; they are not linked to ezFedGrants and the data will not update. If you need new data, you must come back to ezFedGrants and generate a fresh report.
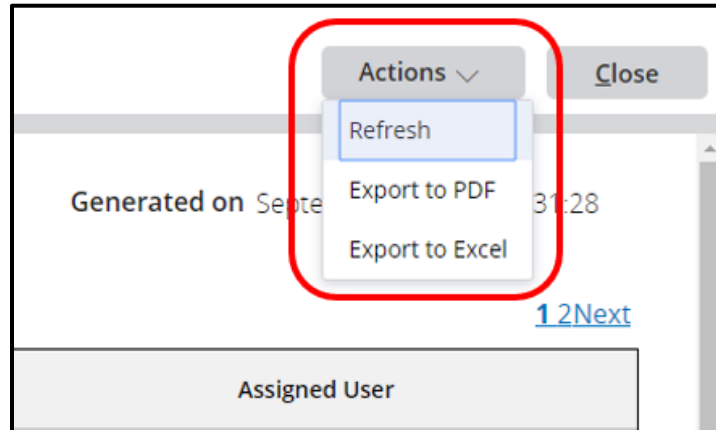
5. To run another report or exit the report, click the **Close** button to go back to the **User Reports** screen.

Understanding the Reports

Organization User Report

The **Organization User Report** displays the first name, last name, user role (access group), and organization name for all users within your organization(s).

With this report you can see:
- The role assignment for all users
- How many Signatory Officials, Grants Processors, and GAOs there are for your organization(s)
- The total number of users under each of your organization(s)

If you are affiliated with multiple organizations, the report will include users for all your organizations. If a single user is affiliated with multiple organizations, that user will appear on the report multiple times.

Work Item Management Report

The **Work Item Management Report** displays information about applications, claims, financial/performance reports, repayment requests, and agreements that are awaiting action by someone in your organization or have been submitted to an agency.

This report allows the GAO to track the status of work items and see who is assigned to which work items.

Specifically, the report displays:
- The relevant agency (selected before the report was generated)
- The associated Federal Award Identification Number (FAIN) (for all except applications)
- The item's type
- The item's ID number
- The item's status (see below for more details)
- The user who created the item or who is currently assigned to the item (for all except **Submitted** status, in which case this column is blank)

Click the text in the **FAIN** and **Item ID** columns to open the associated agreement or other associated screens. Regarding the **Status** column, the report does not show "non-actionable" items. Non-actionable items include cancelled, withdrawn, or rejected items, and any items that have been accepted by the associated agency. The possible statuses the report may show are:
- **Applications:** Draft, Pending Signature, Returned by Signatory Official, Submitted, and Returned by Agency
- **Claims & Repayments:** Draft, Pending Signature, Returned by Certifying Official, Submitted, and Returned by Agency
- **Reports:** Same statuses as claims and repayments plus Not Started.
- **Agreements:** Awaiting Recipient Signature

If you are affiliated with multiple organizations, the report will include work items for all of your organizations. Click the **Item ID** link to view the organization details for a specific item.

See Also

Job Aids

- ezFedGrants External Portal User Roles Quick Reference
- Reassigning Work Items in ezFedGrants Quick Reference
- ezFedGrants Permissions Screen Quick Reference

ezFedGrants Hyperlinks

ezFedGrants Home page
ezFedGrants FAQs general

Need Help?

Contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov.

Version Control

Name	Date	Changes Made
Kandice Whitaker	**March 2022**	• Added Wiki Grants Section in See also • ezFedGrants email address • Removed FAQ hyperlink
Abael Solomon	Jan. 2022	• Updated OCFO Website Link
April Murphy	Sept. 2019	• Initial Document Created