



# Adding/Inactivating Entity Users Instructions

It is the responsibility of the entity Authorized Official and the entity Accounting – Entity Certifier to maintain the list of users for their entity/organization. This is done by assigning and inactivating lower security level users as needed. Remember, users only need to be assigned to the entity/organization once.

For lower security level users to have access to a grant application, the Authorized Official will need to assign them to each application (see Adding Entity Users to Grant Application Instructions).

NOTE: An Authorized Official (or Accounting – Entity Certifier) is only able to assign lower security level users. Should another Authorized Official (or Accounting – Entity Certifier) need to be assigned/replaced, please complete the Security Access form found at [www.michigan.gov/mde-nexsys](http://www.michigan.gov/mde-nexsys) and submit it to [mde-nexsys-applications@michigan.gov](mailto:mde-nexsys-applications@michigan.gov) for review and processing.

## Assigning Lower Security Level Users:

- Select the Administration tab
- Select Organization & Person link
- Select Person link
- Type in user’s last name
- Click on Search button
  - Note: if they do not reside in Michigan, select the blank option from the State textbox dropdown

The screenshot shows the 'Administration' tab selected in the top navigation bar. Under 'Organization & Person', the 'Person Search' link is highlighted with a red arrow. Below this, the 'Persons' search form is visible. A red arrow points to the 'Name' input field, which contains the text 'smith'. Another red arrow points to the 'Search' button at the bottom right of the form. The form includes fields for Name, Title, User Type (set to 'All Users'), City, ZIP Code, Role, Organization, State (set to 'Michigan'), County, and Email. There are also 'Clear' and 'Search' buttons at the bottom right.

- Once the screen refreshes, click the blue hyperlink under the Person column of the individual you are wanting to assign to your entity (see screenshot)

The screenshot shows the 'Search Results' section. A table with the following columns: Person, Organization, Role, and Active Date. The first row contains the following data: Jarrad (with a blue hyperlink), NexSys New User Registration, Registration Pending, and 4/18/2022. A red arrow points to the blue hyperlink 'Jarrad' in the 'Person' column.

Person	Organization	Role	Active Date
<a href="#">Jarrad</a>	NexSys New User Registration	Registration Pending	4/18/2022



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- Once the screen refreshes, select the + sign (upper right side) within the Organization panel (see screenshot)

- A popup screen will display (see screenshot)
- Organization: Select the Organization from the dropdown
- Role: Select the appropriate security level from the dropdown (see NexSys User Security Levels instructions for definitions)

NOTE: Do **not** assign more than one grant access to a user:

- Application Administrator (4)
- Grant Writer (2)
- View Only (1)

Do **not** assign more than one accounting access to a user:

- Accounting – Entity Enter
- Accounting – Entity View
- Activate Date: This textbox defaults to today’s date, but can be changed by selecting from the calendar or entering the date of when the access should begin
- Inactive Date: Select or type the date when access period should end **if** known, otherwise leave the textbox blank
- Assign to Existing Documents: Select Yes from dropdown
- Click the Save button



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- When screen refreshes it will display the Organization Name:

The screenshot shows the 'Person Information' page for user 'Karen Goodsmith'. The 'Organizations' section is highlighted with a red arrow. It contains a table with the following data:

Role Name	Active Date	Inactive Date	Assigned By
Application Administrator (4)	04/23/2024	04/23/2024	ADL testxxx

- To review the entire list of users for the Entity/Organization, click on the Organization Members link:

The screenshot shows the 'Organization Members' page. A red arrow points to the 'Organization Members' link in the left sidebar. The main content area shows a search bar and a table of members. The table has the following columns: Person Name, Role Name, Active Date, Inactive Date, Last Modified By, and Last Modified By Date. The table contains 14 rows of data.

Person Name	Role Name	Active Date	Inactive Date	Last Modified By	Last Modified By Date
ADL testxxx	Authorized Official (5)	02/16/24		System, Grant	02/16/24
Beird, Jennifer	Application Administrator (4)	09/19/18		Post, Joel	09/19/18
Everett, Shannon	Application Administrator (4)	04/07/16		Post, Joel	04/07/16
Franshi, Richard	Application Administrator (4)	07/13/15		Post, Joel	07/13/15
Goodsmith, Karen	Application Administrator (4)	04/23/24		ADL testxxx	04/23/24
Holland, Amber	Authorized Official (5)	07/09/20		Post, Joel	07/09/20
Kossares, Nick	View Only (1)	12/09/19		Post, Joel	12/09/19
Latta-Larsen, Cindy	Authorized Official (5)	03/31/11	07/09/20	Post, Joel	07/09/20
McMillen, Julia	Application Administrator (4)	03/21/18	09/30/20	Holland, Amber	03/19/21
Riggs, Kristina	Authorized Official (5)	09/07/22		Roys, Brenda	09/07/22
Weeks, Dawn	Grant Writer (2)	10/31/23	11/02/23	Roys, Brenda	11/02/23
	Authorized Official (5)	03/31/11	09/07/22	Roys, Brenda	09/07/22
	Application Administrator (4)	11/02/23		Holland, Amber	11/02/23



# Adding/Inactivating Entity Users Instructions

## Inactivating Users:

An Authorized Official (or Accounting – Entity Certifier) is only able to deactivate lower security level users.

Should an Authorized Official (or Accounting – Entity Certifier) level user need to be replaced, please complete the Security Authorization form found at [www.michigan.gov/mde-nexsys](http://www.michigan.gov/mde-nexsys) and submit it to [mde-nexsys-applications@michigan.gov](mailto:mde-nexsys-applications@michigan.gov) for review and processing.

Should an Authorized Official (or Accounting – Entity Certifier) level user need to be deactivated, but a replacement is not yet hired, reach out to [mde-nexsys-applications@michigan.gov](mailto:mde-nexsys-applications@michigan.gov) for a removal form.

## Inactivating Lower Security Level Users:

- Select the Administration tab
- Select Organization & Person link
- Select Person link
- Click on Search button
  - Note: if they do not reside in Michigan, select the blank option from the State textbox dropdown
- Once the screen refreshes, click the blue hyperlink under the Person column of the individual you are wanting to deactivate from your entity (see screenshot)

The screenshot shows the 'Persons' search interface in the NexSys application. The search criteria include Name (Brower), User Type (All Users), State (Michigan), and Email. A red arrow points to the 'Search' button. Below the search form, the 'Search Results' table shows one result for 'Brower, Donna' with a blue hyperlink under the 'Person' column. A red hand icon points to the 'Search' button.

Person	Organization	Role	Active Date	Inactive Date
<a href="#">Brower, Donna</a>	NexSys New User Registration	Registration Pending	11/20/2023 2:41:54 PM	



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- In the Inactivate textbox, type (or select the date from the calendar) the user's access termination date (see screenshot)
- Click the Save button
- Once the screen refreshes, the user is still visible, but no longer has access to the entity's information or grant applications/reports
  - NOTE: a user's record cannot be deleted once they have been assigned in order to maintain the integrity of the electronic records

The screenshot displays the 'Person Information' page for Barry ISD - 08000. The page is divided into several sections: 'Profile' (Basic Information), 'Organizations', and a 'Save' button in the top right corner. The 'Organizations' table is highlighted with a red box, showing the 'Inactive Date' column with a date of 04/29/2024. A red arrow points to the 'Save' button.

Role Name	Active Date	Inactive Date	Assigned By
Application Administrator (4)	04/23/2024	04/29/2024	A0t.testxxx