Adding/Inactivating Entity Users Instructions

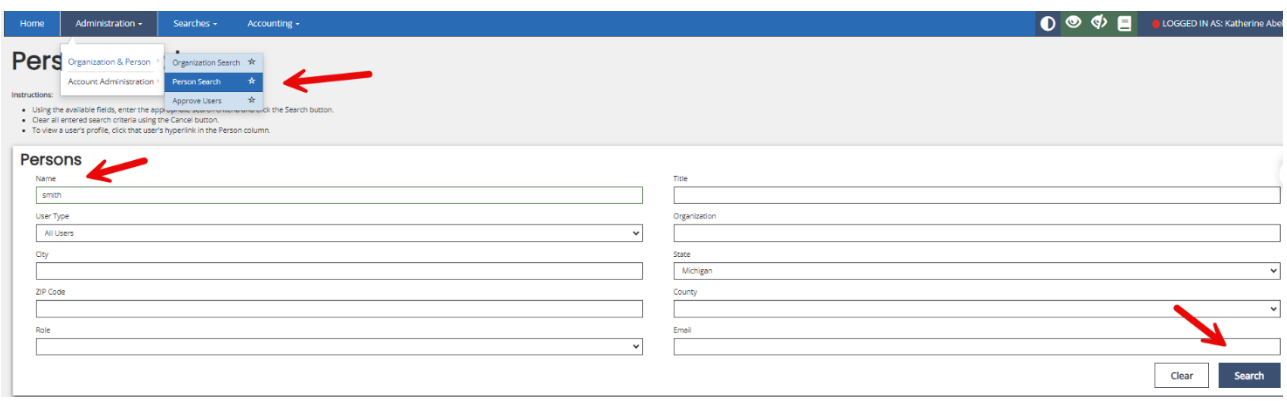
It is the responsibility of the entity Authorized Official and the entity Accounting – Entity Certifier to maintain the list of users for their entity/organization. This is done by assigning and inactivating lower security level users as needed. Remember, users only need to be assigned to the entity/organization 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 and submit it to mde-nexsys-applications@michigan.gov for review and processing.

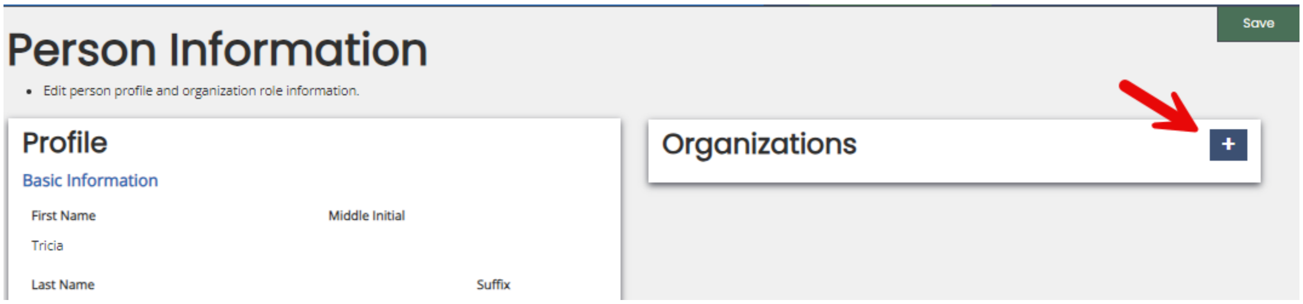
Assigning Lower Security Level Users:

- 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



- 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)

- 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)

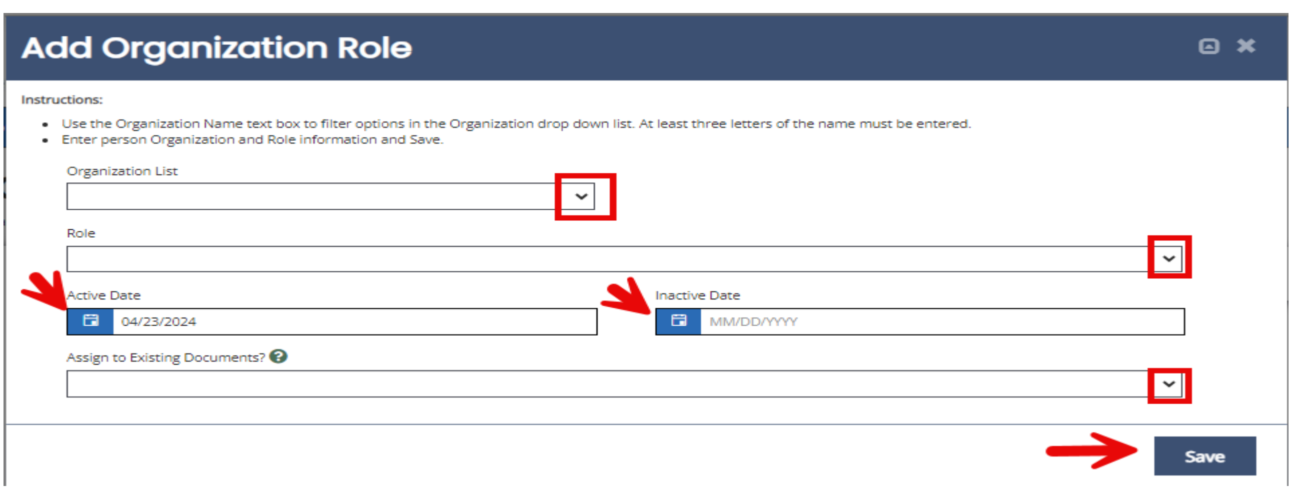
NOTE: Do **not** assign more than <u>one</u> **grant** access to a user:

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

  Do **not** assign more than <u>one</u> **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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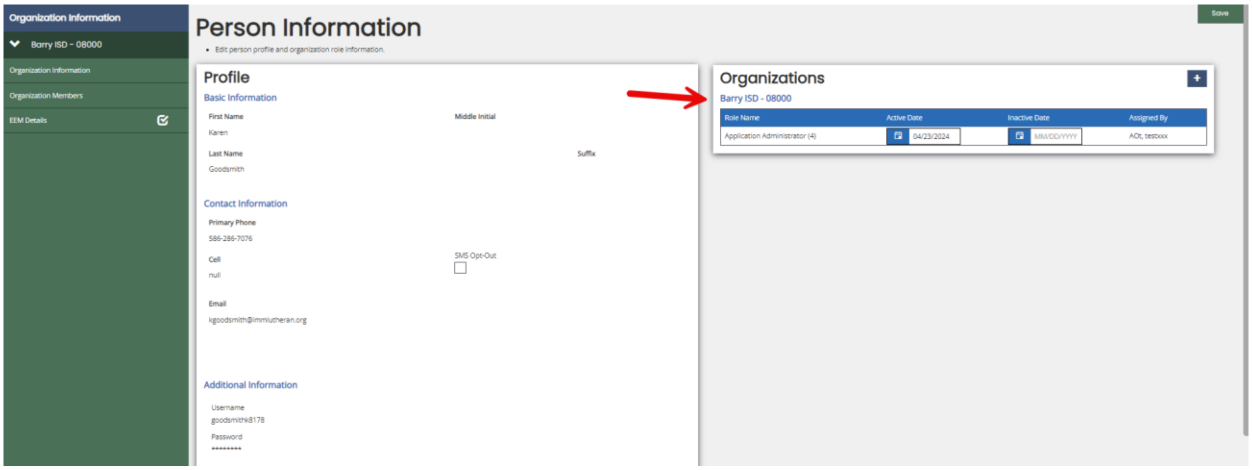
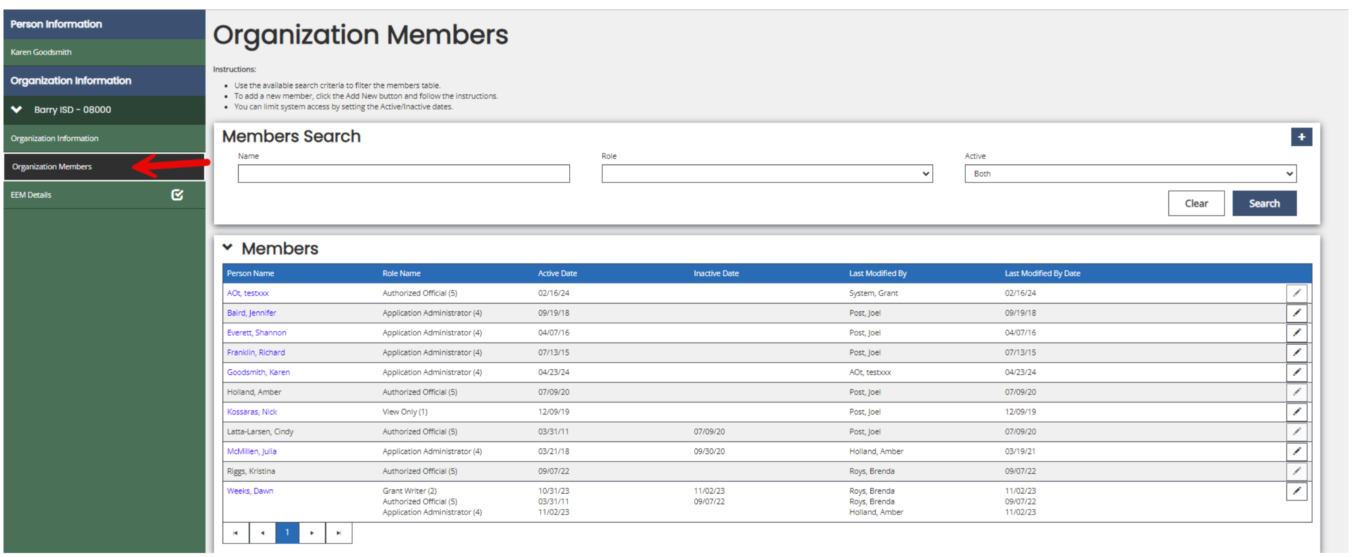
- When screen refreshes it will display the Organization Name:



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



Inactivating Users:

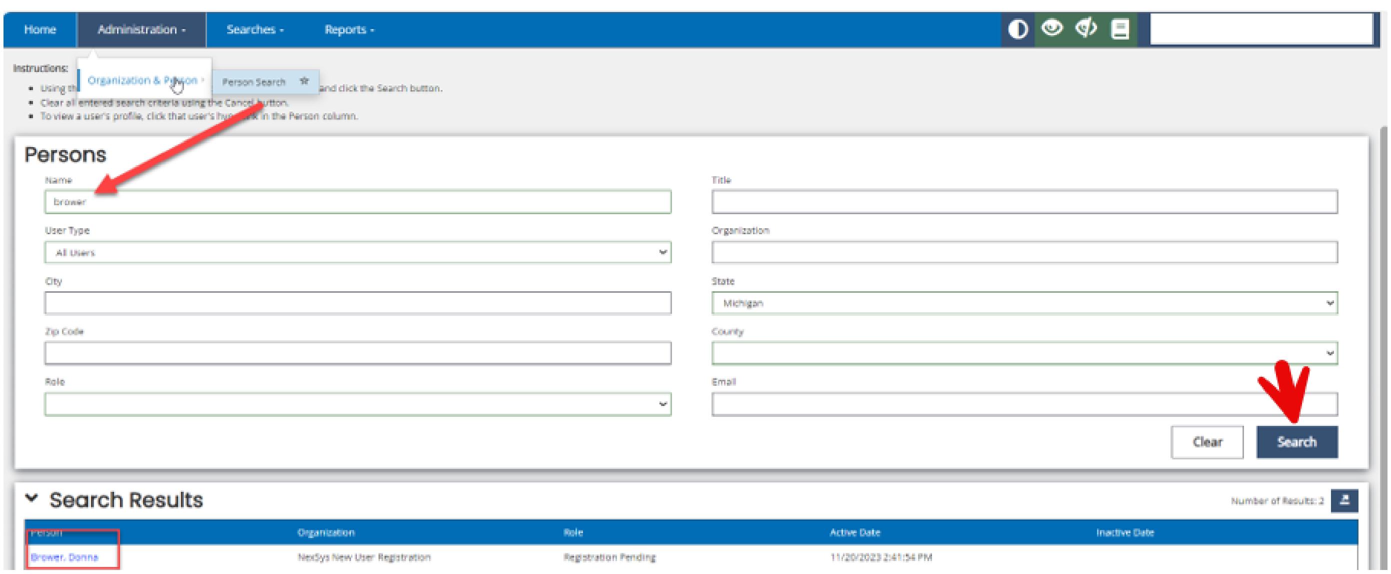
An Authorized Official (or Accounting – Entity Certifier) is only able to inactivate lower security level users.

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 and submit it to mde-nexsys-applications@michigan.gov for review and processing.

Should an Authorized Official (or Accounting – Entity Certifier) level user need to be inactivated, but a replacement is not yet hired, reach out to 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 inactivate from your entity (see screenshot)



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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