



Admin Guide: Manage Users

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Welcome to ASCENDER MemberPortal. This portal allows you to view grant details and create/submit budget revision and reimbursement requests to your fiscal agent.

Before You Begin

Review the [ASCENDER MemberPortal Navigation](#) page to familiarize yourself with the portal.

Create a MemberPortal Account & Log on

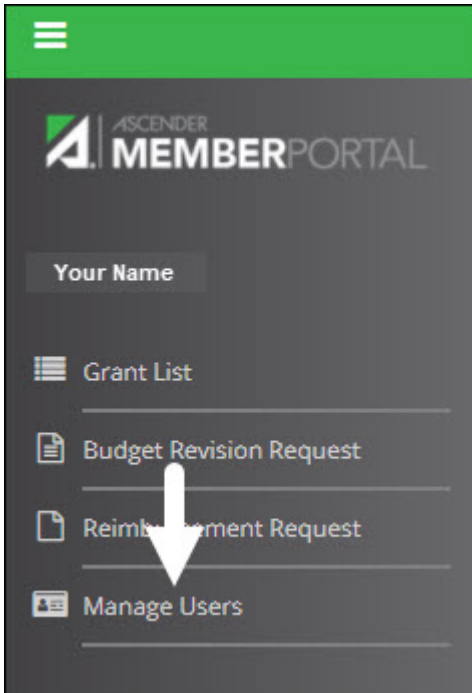
To access the ASCENDER MemberPortal, you must log on.

- If you are a new user and do not have an ASCENDER MemberPortal account, you must create an account.
- In some cases, your fiscal agent will create your account and provide you with a user name and password. In this scenario, use the information provided to log on. Upon initial logon, you will be prompted to reset your password and set up a security question.

At any point in the wizard, you can click **Back** to return to the previous page or click **Cancel** to cancel the process and return to the Login page.

It is recommended that fiscal agents create at least one MemberPortal user with admin permission for each member LEA. If you are an admin user, you will have access to the Manage Users page in MemberPortal where you can add, change, and delete user accounts in MemberPortal for users within your member LEA.

Admin users will have an additional menu item listed under Reimbursement Requests.



Set up & Manage Users

The following steps allow MemberPortal admin users to manage MemberPortal user profiles.

1. [Create and maintain user profiles.](#)

Create and maintain user profiles

[MemberPortal](#) > [Manage Users](#)



This page is only accessible by MemberPortal admin users. Admin users are designated by fiscal agents in ASCENDER Grants and Projects.

This page is used to manage MemberPortal user accounts. Member users can create an account via the MemberPortal; however, they will not have access to any grant information until the fiscal agent or an admin user for their assigned member LEA completes their MemberPortal user profile. Admin users can assign admin permissions to other MemberPortal users, tie users to specific members, and manage the level of access a user has to a grant type.

As a MemberPortal admin user, you can add, change, and delete MemberPortal users.

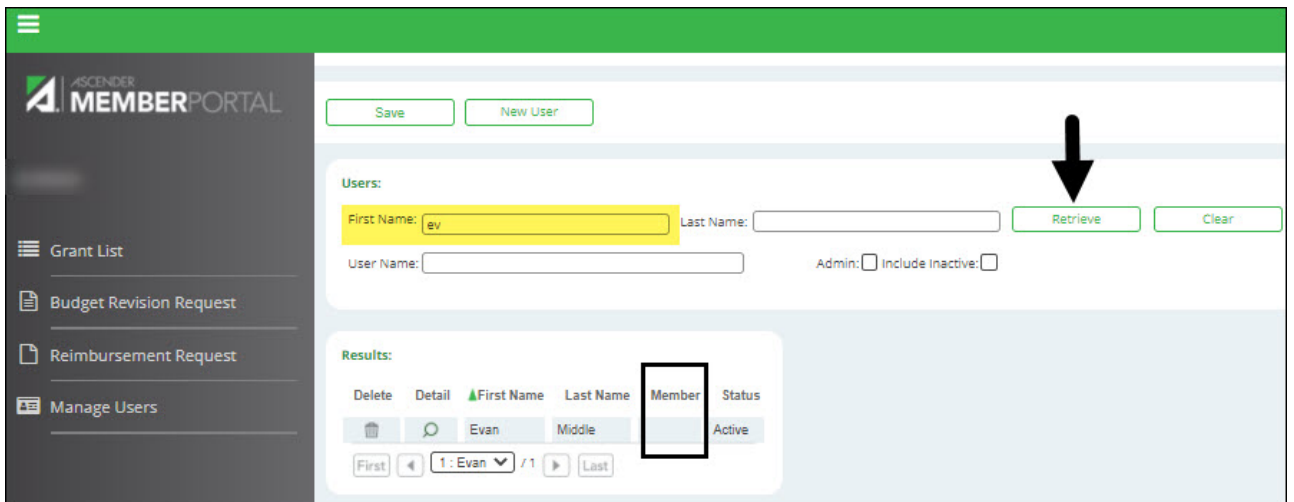
Retrieve a record:


- Under **Users**, use the following fields to retrieve a user record.

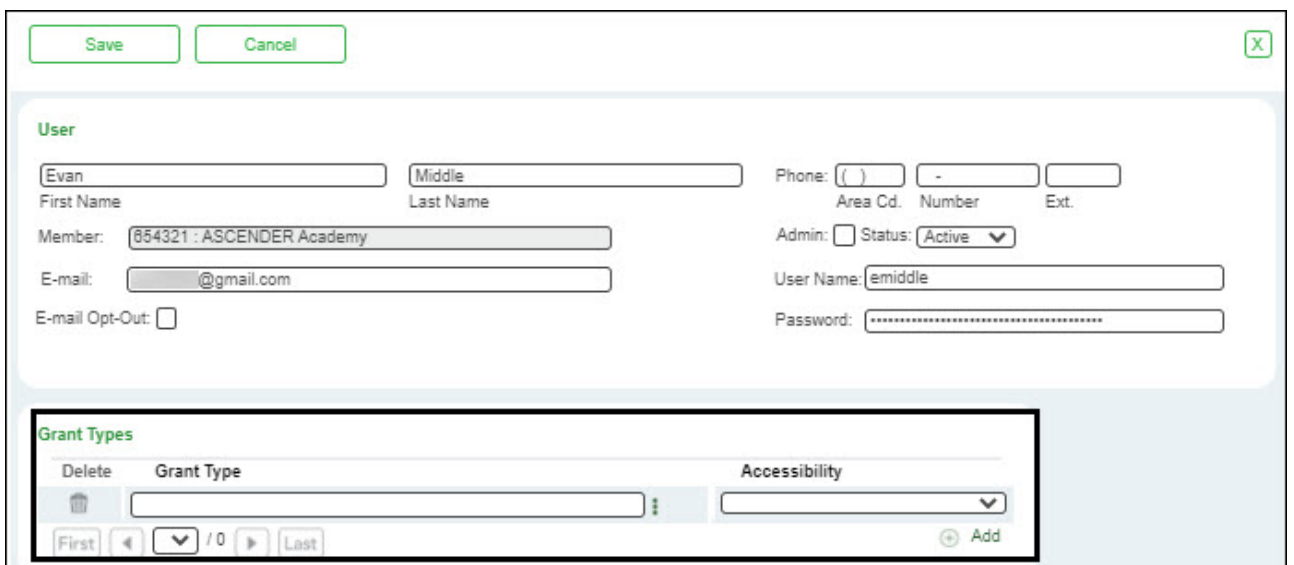
First Name	Type the MemberPortal user's first name.
Last Name	Type the MemberPortal user's last name.
User Name	Type the MemberPortal user's user name.
Admin	Select to only include admin users.
Include Inactive	Select to include users with an inactive status.

❑ Click **Retrieve**. A list of records matching your search criteria displays in the **Results** grid.

If the user created an account in MemberPortal, the user's information is displayed in the list of results. However, you will notice that the **Member** column is blank since their user profile has not been completed. At this point, the user does not have access to view any grant information in MemberPortal.



❑ Click  to open the User detail pop-up window and enter the applicable data to complete the user's MemberPortal profile. The **First Name**, **Last Name**, **Member**, **E-mail**, and **User Name** fields are automatically populated.



Add a record:

If the user did not create an account in MemberPortal, click **New User** to open the User detail pop-up window and enter the applicable data to create the user's MemberPortal profile.



When creating a new MemberPortal user or resetting a user's password, the change password date is set to 01/01/2000, which requires the user to change their password upon logging on to MemberPortal.



Under **User:**

First Name	Type the user's first name. This field can be a maximum of 50 characters.
Last Name	Type the user's last name. This field can be a maximum of 50 characters.

In the **Phone** fields:

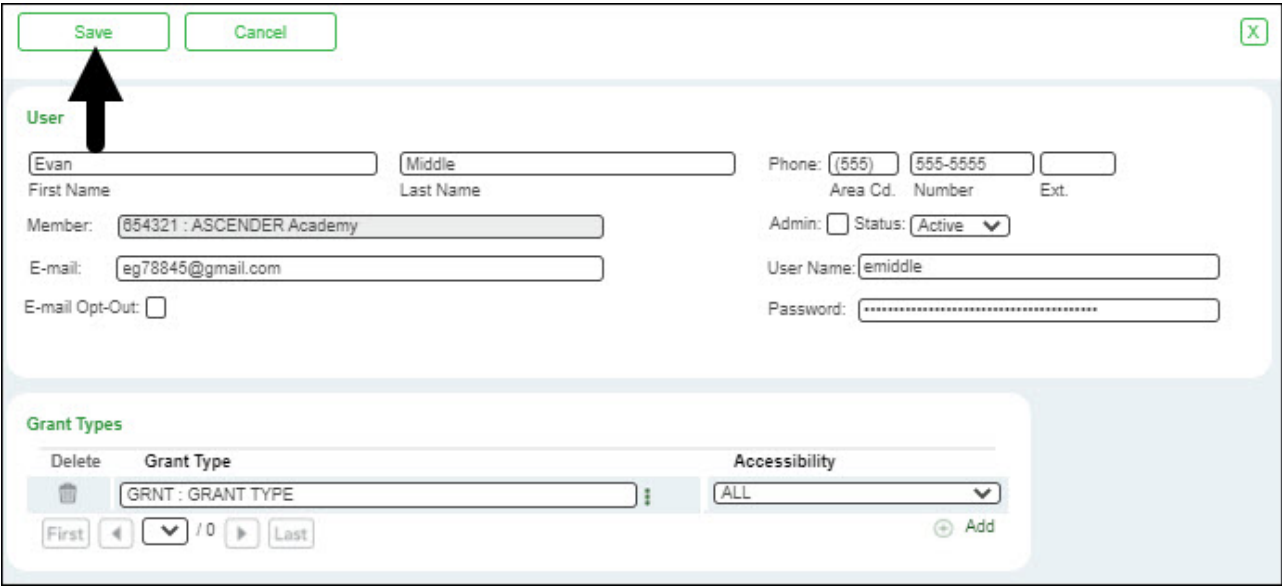
Area Cd	Type the three-digit area code of the phone number.
Phone Nbr	Type the seven-digit phone number.
Ext	Type the four-digit extension number if any.
Member	This field is automatically populated with your assigned Member information (six-digit county district number and name) as set up for your admin user profile in ASCENDER Grants and Projects.
Admin	Select to indicate that the user is an admin user. Users designated as Admin users will be able to manage users for their assigned member in MemberPortal.
Status	Click to select the user's status (<i>A - Active</i> or <i>I - Inactive</i>).
E-mail	Type the user's email address. The field can be a maximum of 45 characters.
E-mail Opt-Out	Select to indicate that this user is opted out of receiving emails.
User Name	Type a 6-25 character user name. (No embedded spaces are allowed.)
Password	<p>Type a new password. If the user initiated the account profile via MemberPortal, this field is populated with an encoded and masked version of the user's password to secure their credentials. Fiscal agents or admin users can update user passwords as needed.</p> <p>Requirements:</p> <ul style="list-style-type: none"> • 16-46 alphanumeric characters • Three of the following: uppercase, lowercase, numeric, and special characters <p>Allowed special characters: : " # \$ % ' () + , - . / : ; < = > @ [\] _ ` { } ~</p> <ul style="list-style-type: none"> • Case-sensitive

Under **Grant Types:**

Grant Type	Begin typing the grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant. If the grant type or description is not known, click  to select a grant from the Grant Types lookup or press the Spacebar to view a list of grant types.
Accessibility	<p>Click  to select the user's level of access to the corresponding grant type.</p> <ul style="list-style-type: none"> • All • Inquire Only • Enter and Save Data • Submit Reimbursement Request • Submit Budget Revision Request <p>Note: If a user only has access to enter and save data, they can only update their requests.</p>

- Click **+Add** to add additional rows.
- Click **Save**. Otherwise, click **Cancel** to return to the Manage Users page without adding data.

After you completed the user's profile, click **Save**.

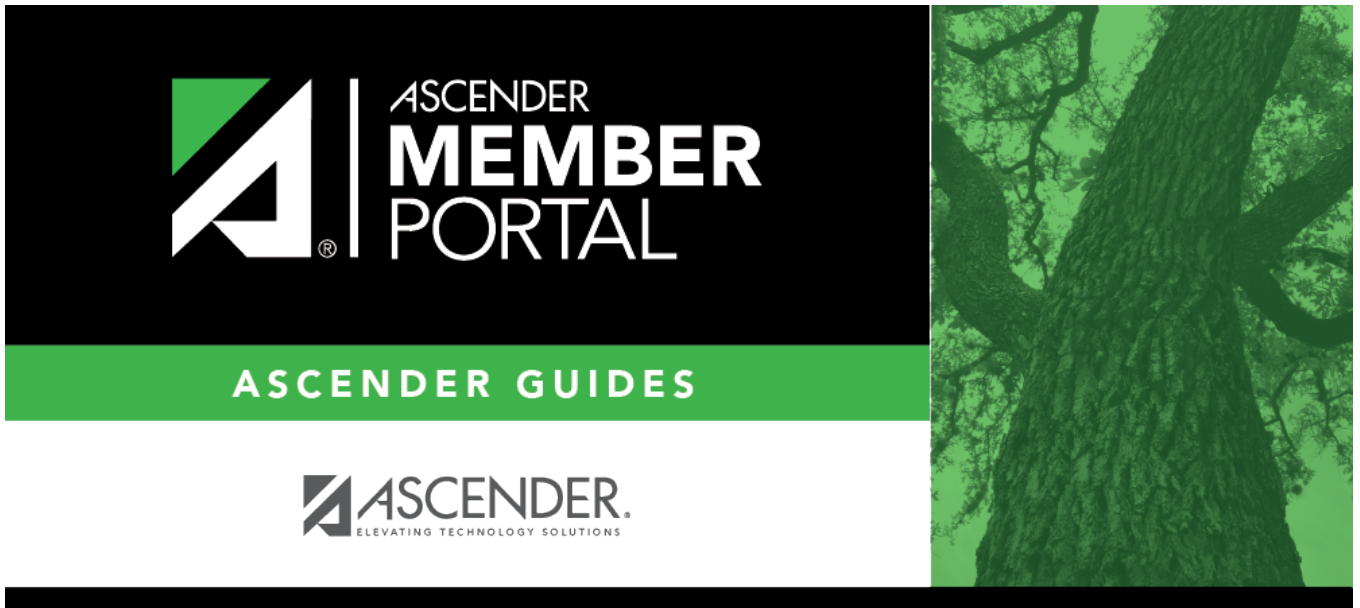


The screenshot shows a user profile form with the following fields:

- User Section:**
 - Buttons: Save, Cancel
 - First Name: Evan
 - Middle: (empty)
 - Last Name: (empty)
 - Phone: (555) 555-5555
 - Member: 854321 : ASCENDER Academy
 - E-mail: eg78845@gmail.com
 - E-mail Opt-Out:
 - Admin: Status: Active
 - User Name: emiddle
 - Password: (masked)
- Grant Types Section:**
 - Buttons: Delete, First, Last, Add
 - Grant Type: GRNT : GRANT TYPE
 - Accessibility: ALL

The user will now have access to the assigned grant type based on the level of accessibility. You will notice that the **Member** column is now populated for the user profile.

The screenshot displays the 'Manage Users' interface in the ASCENDER MemberPortal. On the left, a dark sidebar contains navigation links: 'Grant List', 'Budget Revision Request', 'Reimbursement Request', and 'Manage Users'. The main content area has a green header with a menu icon and two buttons: 'Save' and 'New User'. Below this is a search section labeled 'Users:' with input fields for 'First Name', 'Last Name', and 'User Name', along with 'Retrieve' and 'Clear' buttons. There are also checkboxes for 'Admin' and 'Include Inactive'. The 'Results:' section shows a table with columns for 'Delete', 'Detail', 'First Name', 'Last Name', 'Member', and 'Status'. A single user is listed with the name 'Evan Middle' and ID '854321 : ASCENDER Academy', with a status of 'Active'. The 'Member' cell is highlighted with a black box. At the bottom of the results section, there are pagination controls showing '1 : Evan' and '1 / 1'.



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