Manage Users - GRT2160

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This page is used to manage user accounts in Grants and Projects and MemberPortal. In order for users to have the appropriate access to a grant, user profiles must be completed by linking the user to a specific member and grant type, and assigning the level of access the user has to a grant type. Fiscal agents can use this page to add, change, and delete user accounts in both Grants and Projects and MemberPortal.

Member users can create an account via MemberPortal; however, they will not have access to any grant information until the fiscal agent or MemberPortal admin user completes their user profile.

TIP: **It is recommended** that fiscal agents create at least one MemberPortal user with admin permission for each member LEA. Admin users will have access to a Manage Users page in MemberPortal where they can perform all of these same tasks for users within their member LEA.

Retrieve a record:

❑ Under **Users**, use the following fields to narrow your search results:

First Name	Type the MemberPortal user's first name.
Last Name	Type the MemberPortal user's last name.
Member	Type the member name or county district number.
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 user's **First Name**, **Last Name**, **E-mail**, and **User Name** fields are automatically populated.

Add a record:

❑ Click **Add User** to open the User detail pop-up window and enter the applicable data to add a new user and complete the user's 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	Begin typing a member name or six-digit county district number. As you type the data, a drop-down list of corresponding data is displayed. Select a member. If the member name or county district number is not known, click ⋮ to select a member from the Member lookup or press the SPACEBAR to view a list of members.
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 (*A - Active* or *I - Inactive*).
E-mail	Type the user's email address. The field can be a maximum of 250 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	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. Requirements: Between 16 and 46 characters. Must include at least one of each of the following character types: • Uppercase letters (A–Z) • Lowercase letters (a–z) • Numbers (0–9) • At least one allowed special character

❑ 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	Click ⌄ to select the user's level of access to the corresponding grant type. • All • Inquire Only • Enter and Save Data • Submit Reimbursement Request • Submit Budget Revision Request **Note**: If a user only has access to enter and save requests, they can only update their requests.

❏ Click **+Add** to add additional rows.

❏ Click **Save**. Otherwise, click **Cancel** to return to the Manage Users page without adding data.

Other functions and features:

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.


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