

Disabling Users

Browser: Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

NOTE: It is the Organization's responsibility to maintain their account Users.

Overview

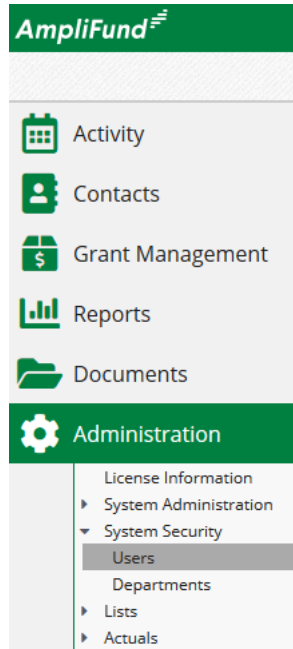
This guide describes the steps that must be taken to disable or delete a user from your account if you have staff leaving their positions or who no longer need access to the account.

Who can disable other users?







You must have a Security Role of **Organizational Admin** to disable users.

How to disable users

1. Click on the Administration (left navigation) > System Security > Users




2. Click the edit pencil on the user you want to disable.


Display Name ▲		Role
Jerry Gergich	  	Department User (No Salary)
John Doe	  	Organizational Admin / Account Owner

3. Scroll to the bottom of the page.
4. Change the **Staff Record Information** Status to 'Disable'.
5. Change the **User Record Information** Status to 'Disable'.

NOTE: You want to 'Disable' users, do not 'Delete' users.

Staff Record Information

Last Contacted 

Last Verified 

Unique Identifier

Status* ▼

User Record Information

User Identifier

Status* ▼

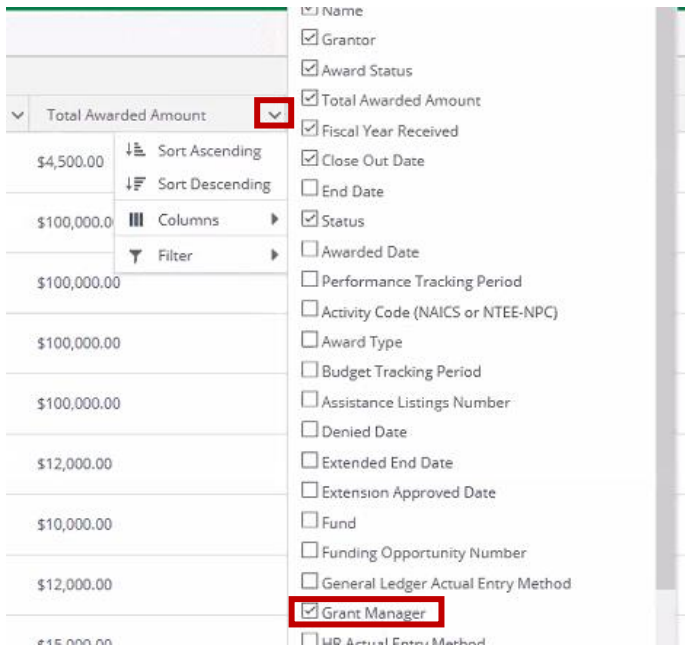
6. Click **Update**.

Next Steps

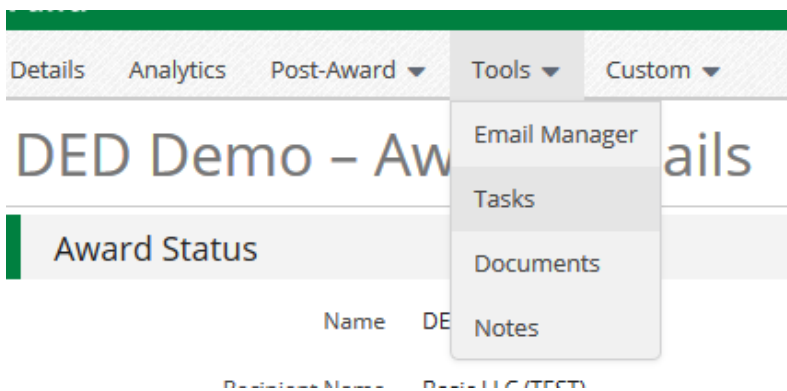
After you have disabled a user, you need to assign any awards they manage or tasks they are assigned to a new user.

- Navigate to any open awards previously managed by the disabled user. Click on Grant Management (left-hand navigation) > Grants

NOTE: If you are unsure which awards they managed, click a dropdown arrow on any column and add the 'Grant Manager' column. It will be blank if the disabled user was previously assigned to it.






- Assign a new Grant Manager to any awards previously managed by the disabled user. If you need directions, see [FAQ – Award Management > General](#): 'What to Do When You Receive a Grant – Assign Recipient Grant Manager'.
- After you've assigned a new Grant Manager, you need to re-assign any tasks from the disabled user to the new Grant Manager. Click on Tools (top navigation) > Tasks









10. You will see a list of tasks. If the 'Responsible Individual' is the disabled user, click the edit pencil.

Details Analytics Post-Award Tools Custom


DED Demo – Tasks

Actions   

<input type="checkbox"/> Select All	Name	Responsible Individual	Due Date ↑	Task Status
<input type="checkbox"/>	Download Contract, Sign and Reupload   	John Doe	3/19/2021	Completed
<input type="checkbox"/>	Complete 'State of Nebraska W-9 and ACH Enrollment Form'   	John Doe	3/19/2021	Completed

11. Highlight and delete the responsible individual. A dropdown of all your staff will appear. Choose the new staff person to assign to the task.

NOTE: If the dropdown doesn't come up automatically, start typing in the name of the person you wish to assign.

Responsible Individual* 

Additional Individuals

- Jerry Gergich
- John Doe

12. Click **Save**.