COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

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AMIS User Account Management Guide

July 2016

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1 Introduction

The purpose of this supplemental guide is to provide further instructions on managing user accounts in AMIS. As an AMIS user, you need only one account (i.e., one AMIS username) to support multiple organizations, and to perform tasks related to managing organization and program profiles, which includes creating and submitting applications for programs implemented in AMIS.

An AMIS user can support an organization in one of two ways – as a Contact or as an External Contact. AMIS requires that each user be assigned one primary organization. For this primary organization, you will be listed as a Contact. You can only be a Contact for one organization. Each Contact has one of the following Profiles: Admin User (full control); User (same as Admin User, but cannot create or change the permissions of other Contacts); and Viewer (read-only).

To support another organization (other than your primary), you become an External Contact for that organization. Your identification as a Contact or an External Contact will not restrict what access you have to that organization with one exception. An External Contact cannot create or change the Profile (i.e., permissions) of Contacts at that organization. The key Access Control settings associated with an External Contact are Edit (read and write access); Read (read-only access); and Pending (access requested, but not yet granted).

The remainder of this guide provides instructions on how to create and disable Contacts, and how enable and remove External Contacts.

2 Managing Contacts

2.1 Creating Contacts

2.1.1 Registering a New Organization and the First Contact

To register a new organization in AMIS, the registering user accesses the AMIS Landing Page and selects the login tab in the top right corner. This will display the AMIS "Terms and Use of Acceptance" and the text boxes for logging into AMIS.

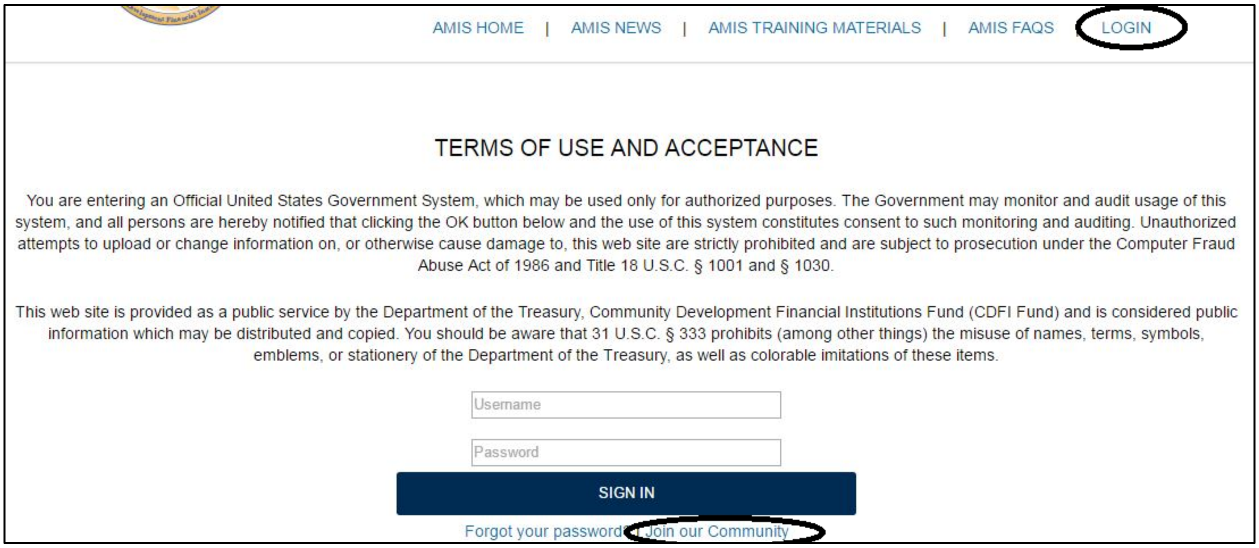
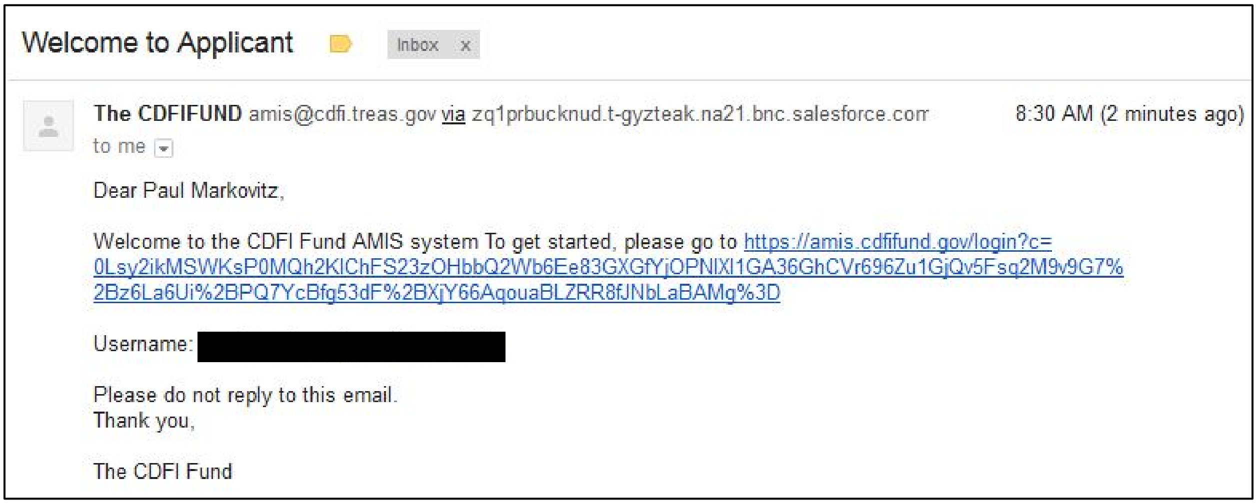


Figure 1. AMIS Login Screen

Underneath the "Sign In" button, the registering user selects the "Join our Community" link to begin the registration process. AMIS displays the New User Registration form.

Figure 2. New User Registration Form

The registering user completes and submits the registration form. Upon submission, AMIS displays a "Thank you for registering" message and sends the following "create password email message" to the email address provided on the registration form. Note that the email address provided must be unique within AMIS.



Welcome to Applicant   Inbox x

The CDFIFUND amis@cdfi.treas.gov via zq1prbucknud.t-gyzteak.na21.bnc.salesforce.com   8:30 AM (2 minutes ago)
to me

Dear Paul Markovitz,

Welcome to the CDFI Fund AMIS system To get started, please go to https://amis.cdfifund.gov/login?c=0Lsy2ikMSWKsP0MQh2KIChFS23zOHbbQ2Wb6Ee83GXGfYjOPNIXI1GA36GhCVr696Zu1GjQv5Fsq2M9v9G7%2Bz6La6Ui%2BPQ7YcBfg53dF%2BXjY66AqouaBLZRR8fJNbLaBAMg%3D

Username: [redacted]

Please do not reply to this email.
Thank you,

The CDFI Fund

Figure 3. Create Password Email Message

Selecting the link in the email displays the AMIS "Change Your Password" page, where the registering user creates the password for the AMIS account. The password must be at least 8 characters, and contain letters, numbers, and at least one special character from the following:

! # $ % - _ = + < >

After entering the new password, the registering user is logged into AMIS. The registering user is made an Admin User Contact for the newly created organization.

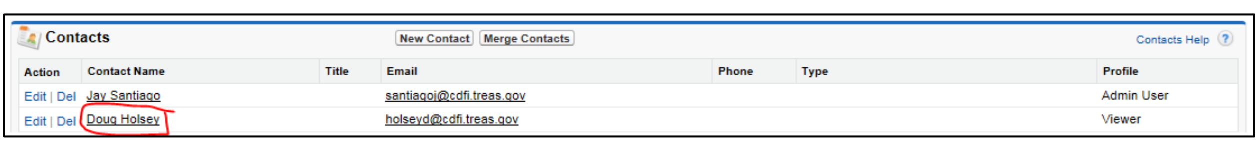
2.1.2 Registering as a New Contact

Additional Contacts for an organization can be created in one of two ways. The preferred way is for the new user to go to the AMIS Login Page and click the "Join our Community" link. This will display the New User Registration page (see Figure 2. New User Registration Form).

The new user completes and submits the registration form. Upon submission, AMIS creates a Contact record (profile of Viewer) for that user for the organization requested. The new Contact has read-only permissions until an Admin User elevates the Profile to User or Admin User.

To elevate the Profile, the Admin User performs the following steps:

1. Go to the list of contacts on the Organization Detail page and click on the name of the Contact.



Contacts   New Contact   Merge Contacts   Contacts Help

Action	Contact Name	Title	Email	Phone	Type	Profile
Edit | Del	Jay Santiago		santiagoj@cdfi.treas.gov			Admin User
Edit | Del	Doug Holsey		holseyd@cdfi.treas.gov			Viewer

Figure 4. Organization List of Contacts

2. This displays the Contact Detail Page. Select View Partner User from the Manage External User drop-down.

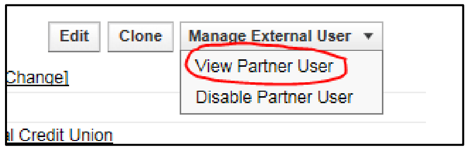


Figure 5. Manage External User Options – View Partner User

3. This displays the User Detail page. Click Edit, change the Profile setting, and click Save.

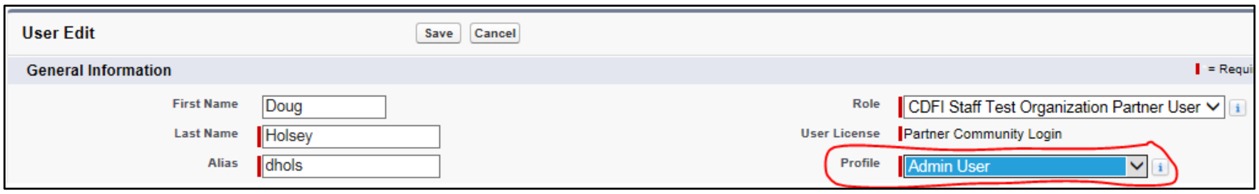


Figure 6. Contact User Edit Screen

The new user will now have the appropriate type of access based on the Profile selected.

2.1.3 Creating a New Contact Manually

The second way to create a new Contact is for an Admin User to create the Contact manually. To create a new Contact, the Admin User performs the following steps:

1. Go to the list of contacts on the Organization Detail page and click on the New Contact button.

Figure 7. New Contact Button

2. This displays the Contact Edit page. Complete the information for the new Contact and click Save.

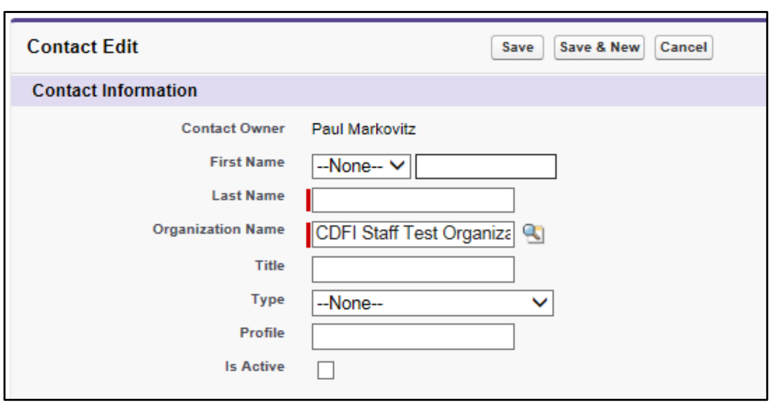


Figure 8. Contact Edit Page

3. This creates the new Contact, but does not assign a Profile to the new Contact. Follow steps 2 and 3 from section 2.1.2 to make the new Contact an Admin User, User, or Viewer.

2.2 Disabling Contacts

Within AMIS, Contacts cannot be deleted or removed, but they can be disabled by an Admin User. A disabled Contact cannot log into AMIS. To disable a Contact, the Admin User performs the following steps:

1. Go to the list of contacts on the Organization Detail page and click on the name of the Contact.

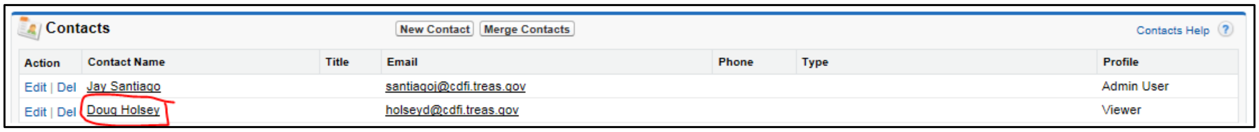


Figure 9. Organization Contacts List

2. This displays the Contact Detail Page. Select Disable Partner User from the Manage External User drop-down.

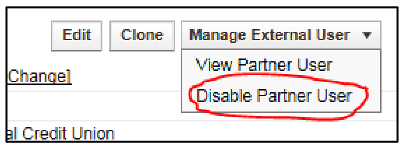


Figure 10. Manage External User Options – Disable Partner User

The Contact no longer has access to AMIS. The CDFI Fund is currently developing an enhancement that will show in the list of Contacts the ones that are active versus the ones that have been disabled.

3 Managing External Contacts

3.1 Enabling External Contacts

Unlike Contacts, a user must request to become an External Contact for an organization. An Admin User cannot manually create an External Contact. To request to become an External Contact, a user performs the following steps.

1. Go to the AMIS Home tab. If the side bar is not expanded, there will be a small triangle inside an oval just under and to the left of the Home tab. Click that.

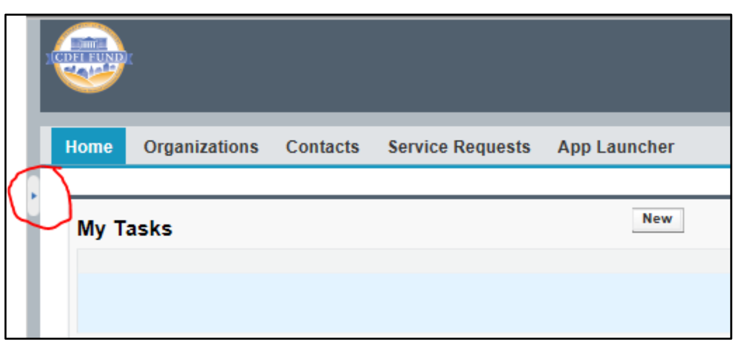


Figure 11. AMIS Home Page

2. This exposes the side bar. On the side bar, under Custom Links, click “Access to Additional Organizations”.

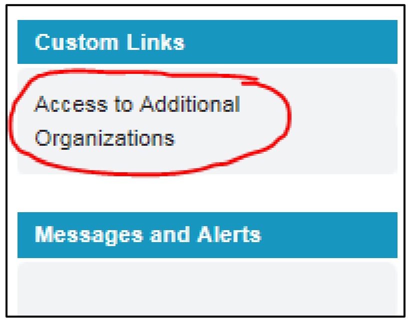


Figure 12. Access to Additional Organizations Link

3. Enter the EIN for the organization you are requesting access and click Search. Check the box next to the name, then click the Process Selected button.

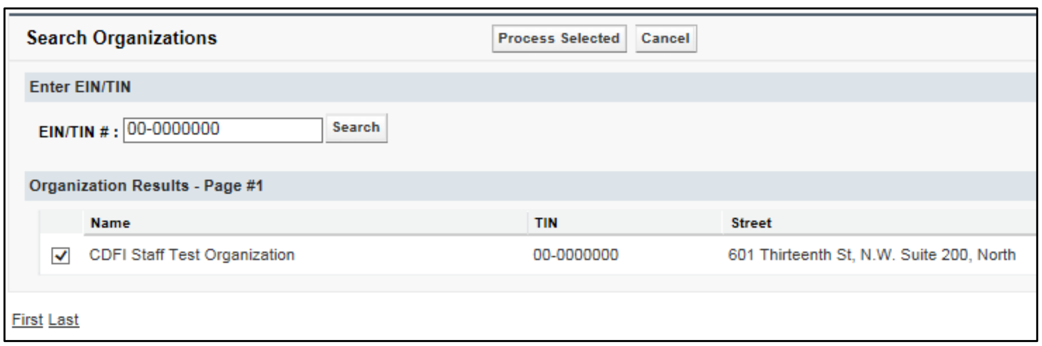


Figure 13. Search Organizations Page

4. This will create a record for you as an External Contact under the requested organization. Your Access Control will be set to Pending. At this time, you do not have access to the organization. The screen shots below are now relevant to an Admin User, User, or an External Contact with “Edit” access at the requested organization.

5. On the Organization Detail page, scroll down to the External Contacts. Click on the External Contact name (i.e., EC-xxxxxxx).

Figure 14. External Contacts List

6. This displays the External Contact Detail page. Click the Edit button.

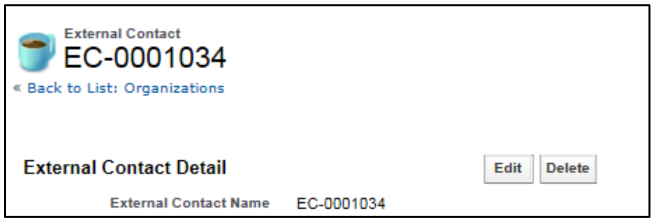


Figure 15. External Contact Details Page

7. This displays the External Contact Edit screen. Change the Access Control setting to Edit or Read, then click Save.

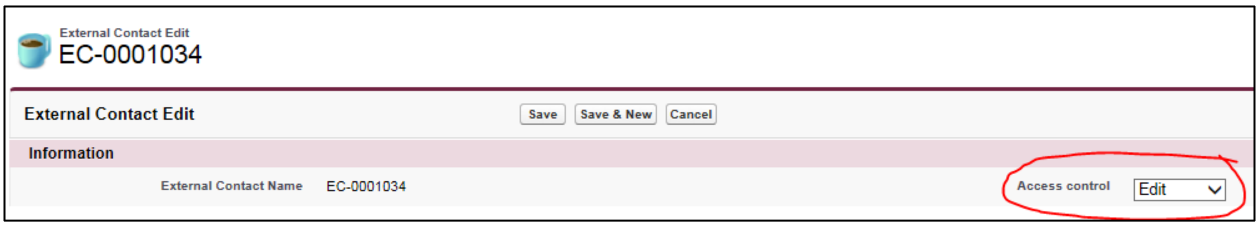


Figure 16. External Contact Edit Page

The External Contact will now have the needed permissions for that organization.

3.2 Removing External Contacts

Unlike Contacts, External Contacts can be removed. To remove an External Contact, an Admin User, User, or another External Contact (with Edit access) performs the following steps.

1. On the Organization Detail page, scroll down to the External Contacts. Click on the External Contact name (i.e., EC-xxxxxxx).

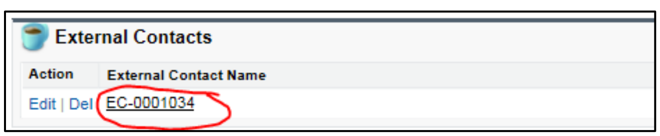


Figure 17. Organization External Contacts List

2. This displays the External Contact Detail page. Click the Edit button. **<u>Do NOT</u>** select Delete.

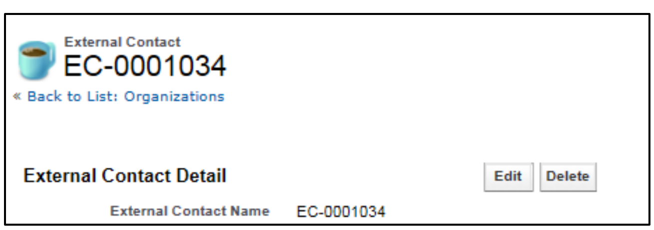


Figure 18. External Contact Edit Button

3. This displays the External Contact Edit screen. Change the Access Control setting to Remove, then click Save.

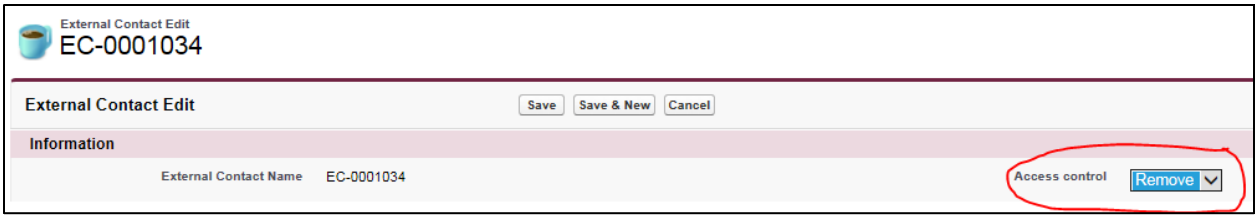


Figure 19. External Contact Remove Option

This will remove access to the organization for that External Contact. It will also remove the External Contact from the list of External Contacts on the Organization Detail page.