

# Best Practices for Deactivating Team Members

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Prior to deactivating a user account there are steps we recommend taking that will ensure assigned work and incoming requests don't fall through any cracks.



We strongly recommend working with team members to document screenshots and report criteria members use to manage their work so that when a team member leaves, the team knows how to recreate these views/reports. **Be sure to create any custom views and reports using the "assignees" filter before deactivating your team member.**

## Templates and Settings

1. Request forms:
  - If the team member is a request acceptor on a concierge form and assigned to receive new request notifications, reach out to our [Support Team](https://guide.lytho.com/help/contact-feedback) to have that person removed as a request acceptor. If you know the person replacing them, ask support to reassign to the newly designated request acceptor. For any forms you or your team member manage, please update accordingly.
  - If the team member is included in any lists within your concierge request form(s) reach out to our [Support Team](https://guide.lytho.com/help/contact-feedback) to request they be removed. For any forms you or your team member manage, please update accordingly.
2. Remove and/or reassign team member from any [project templates](https://guide.lytho.com/help/project-templates#assigning-team-members) they are assigned.
3. Remove and/or reassign team member from any [route templates](https://guide.lytho.com/help/review-routes#creating-a-route-template) they are assigned.
4. If the team member is included in any [custom fields](https://guide.lytho.com/help/managing-custom-fields), remove them. **If replacing with another team member, be sure to delete and add a new field to ensure historical information is not impacted.**

## Reassigning Work

**Before deactivating a user** run the following reports (if applicable) or create a custom view and filter on "assignees" for the team member who is leaving. \*Unassign and reassign (if replacement has been designated) for all open items.

1. **All work** – Include additional filters for work status & select all open work statuses
  - If you are using Specialties, see Step 3.
2. **Projects** – Include additional filters for project status & select all open project statuses

- If you are using Specialties, reassign using [Specialties](https://guide.lytho.com/help/resource-management-specialties#managing-specialties-in-projects) (https://guide.lytho.com/help/resource-management-specialties#managing-specialties-in-projects) at this level.
- 3. **Campaign** – Include additional filters for campaign status & select all open campaign statuses
- 4. **Reviews** - If the team member was responsible for submitting reviews, also run a Reviews report. Add additional filters for “Reviewer Name” and select the team member, filter on “Review Status” and select all open review statuses. Assign the newly designated replacement and select to skip the team member who is leaving.
- 5. **Request** - If the team member was a request acceptor, run a request report or create a request custom view. Add an additional filter for request status “Submitted and Accepted”.

*\*If you don't have enough open seats in your account to do so, please reach out to your CSM or [success@lytho.com](mailto:success@lytho.com).*

*\*If you need to keep legacy data for reporting purposes, only assign the newly designated replacement.*



Note that when a user is deactivated, you will still be able to access historical data on that user via reporting. Run the needed report and filter and sort via Excel. If you worked with your CSM for this process, please let them know once the above steps are complete.

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