Accessing the Application

1.002

Lesson Details

🖵	Learning Objectives:	To ensure that users understand how to register for and access the application.
⏱	Duration:	15 minutes
⬦	Pre-requisites:	None
⬦	Recommended:	None

Agenda

Registering for the Application   Q&A

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Registering for the Application   Q&A

1. Active Directory User Request

Step	Who	Action
1.	User	**Submit Active Directory User Request to OTech** **Active Directory & Email User Request**
2.	User	Login to the Budget module and complete a User Access Request GFMIS Budget Module
3.	BBMR	Review User Access Request and Approve or Reject
4.	User	Login to the Budget module and commence working

The first requirement for accessing the Budget application is to have an account in the Government of Guam's Active Directory (AD). If you don't already have one, you can request OTech to create one using the Active Directory & Email User Request form illustrated above.

1. Provide your relevant details
2. The minimum requirement is an AD User Account
3. Provide the Required Agency Approvals
4. Sign the request
5. Complete and sign the Rules of Behavior.

You can download form OTECH 19-005 (AD and Email Request) from:
https://otech.guam.gov/wp-otech-content/uploads/2022/04/OTECH-19-005-AD-and-Email-Request_v6-mod-3.31.2022-FINAL.pdf

OTech can provide further information on completing this request.

2. Login to the Budget Module

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech Active Directory & Email User Request
2.	**User**	**Login to the Budget module and complete a User Access Request** **GFMIS Budget Module**
3.	BBMR	Review User Access Request and Approve or Reject
4.	User	Login to the Budget module and commence working

Once OTech has given you your Active Directory account details, you can access the Budget Module using your internet browser.

The web address is: http://10.1.32.4/Budget-DEV

When you "log into" the system for the first time, you have been granted no access permissions. You cannot see any reports, any data, or perform any system functions. You must submit a User Access Request to ask permission to see various components, such as the portion of your agency and your role within that agency.

The User Access Request document is an electronic form which you complete to provide your details, and to request access to various system components. After you submit the request, BBMR will review it and, if approved, you will be given the required system permissions.

RE0   Needs a screenshot of the menu
Ray Elliott, 2023-09-02T02:18:49.593

The User Access Request document consists of four main sections:

1. User Details*:* Here you provide details about yourself.
- **Full Name**: You must provide your full name, such as Joanne Smith.
- **Contact Phone**: You must enter your phone number for contact.
- **Email**: You must provide a valid contact email address.
- **Mobile Phone**: You must enter you cell/mobile phone number for contact.
- **Local User Name**: You must enter the Active Directory name that OTech gave you.
- **Report User Name**: You must enter the Active Directory name that OTech gave you.
- **Culture**: By default, the Budget Module uses your local PC's culture setting for language and date formatting. You can override this by entering a valid culture value in this field; usually it is best to leave this empty.
- **Active**: This needs to be ticked for you to have access to the Budget Module. Only change this if you want to disable your access.

…2b. User Access Request: Security
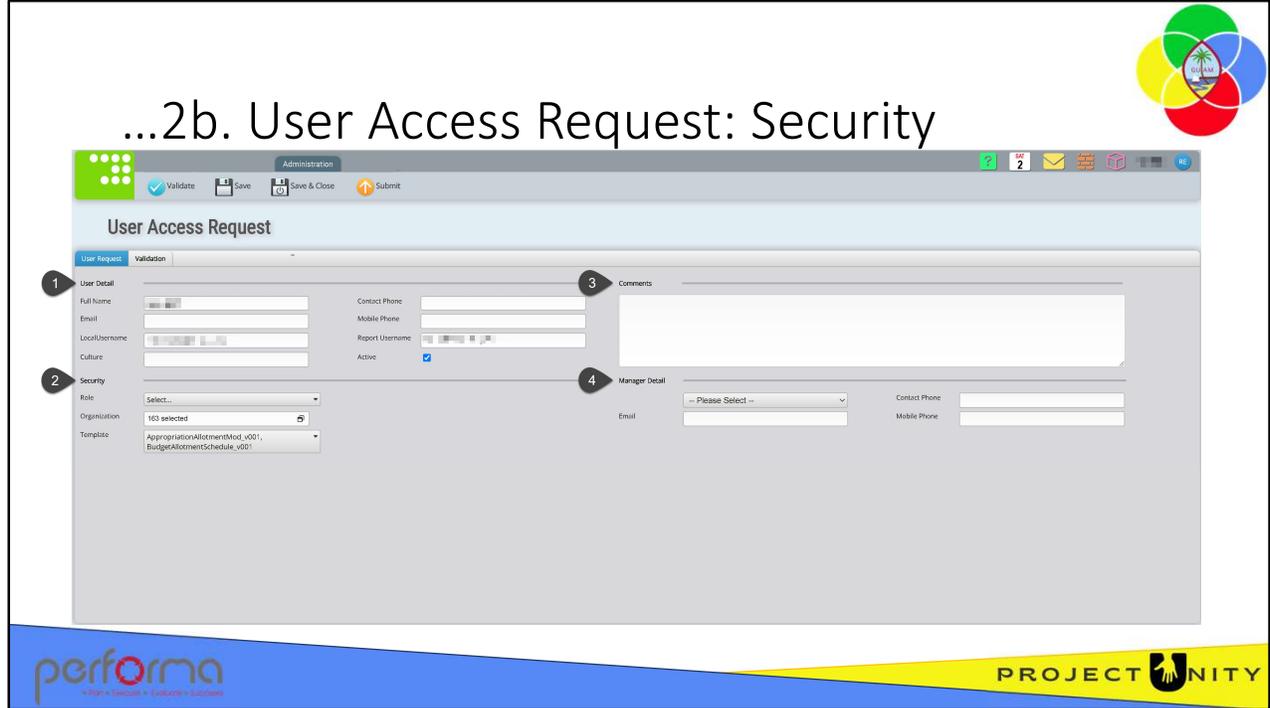
2. Security: Here you request access to various system functionality and components.

- **Role**: Select the role that matches what you need to do within the Budget Module:
  At BBMR:

  Role   Description

  Budget Office Enquirer
  >   The BudgetOffice Enquirer reviews documents and reports for
  >   information purposes only, will not enter or approve documents

  Budget Office Analyst
  >   The BudgetOffice Analyst is responsible for:
  >   • reviewing documents submitted from Departments and returning them
  >   with commentary to the Department for revision if required, or
  >   submitting them to the BudgetOffice Supervisor role for review
  >   • creating documents and submitting them to the BudgetOffice
  >   Supervisor role for review

  Budget Office Supervisor
  >   The BudgetOffice Supervisor is responsible for:
  >   • reviewing documents and either forwarding them to the BudgetOffice
  >   Approver or returning them with commentary to the BudgetOffice
  >   Analyst for revision

2. Security: *(…continued)*

> • creating documents and submitting them to the BudgetOffice Approver role for approval

Budget Office Approver

> The BudgetOffice Approver is responsible for:
>
> • reviewing documents and either returning them with commentary to the BudgetOffice Supervisor for revision, or approving them

At Departments and Divisions: The roles at Departments or Divisions are similar. If you work in a department, such as DoA, you would select one of the Department roles. If you work in a division of DoA, such as General Service Agency, you would select one of the Entity roles.

Department Enquirer

> The Department Enquirer reviews documents and reports for information purposes only, will not enter or approve documents

Department Analyst

> The Department Analyst is responsible for:
>
> • reviewing documents submitted from Divisions and returning them with commentary to the Divisions for revision if required, or submitting them to the Department Approver role for approval
>
> • creating documents and submitting them to the Department Approver role for approval

Functional Security: User Roles

Division/Agency Roles	Department Roles	BBMR Roles
Entity Enquirer Entity Analyst Entity Approver	Department Enquirer Department Analyst Department Approver	BudgetOffice Enquirer BudgetOffice Analyst BudgetOffice Supervisor BudgetOffice Approver Administrator

2. Security: *(…continued)*

       Department Approver
           The Department Approver is responsible for:
           • reviewing documents submitted by a Department Analyst and either forwarding them to the BudgetOffice Analyst for review or returning them with commentary to the Department Analyst for revision
           • creating documents and submitting them to the BudgetOffice Analyst for review

       Entity Enquirer
           The Entity Enquirer reviews documents and reports for information purposes only, will not enter or approve documents

       Entity Analyst
           The Entity Analyst is responsible for:
           •creating documents and submitting them to an Entity Approver for approval

       Entity Approver
           The Entity Approver is responsible for:
           • reviewing documents submitted by an Entity Analyst and either forwarding them to the Department Analyst for review or returning them with commentary to the Entity Analyst for revision
           • creating documents and submitting them to the Department Analyst for review

…2e. User Access Request: Security

2. Security: *(…continued)*

- **Organization**: A popup window will open when you click the Organization field. The popup contains a hierarchical list of all Departments and Divisions within the Government of Guam. You can select as many items from the list as you need. Selecting a parent by default selects its descendants, however you can deselect any that are not required. When you have finished your selections, click the green OK button in the top left corner of the popup.

- **Template**: When you click on the Template field you can select one or more templates from the list. A template is an electronic document that fulfils a business process. The options available are:
    - **AppropriationAllotmentModification**: The Appropriation/Allotment Modification document is used for the entry of Revision adjustments (modifications) against the active, legislative approved Current Year budget by Division, Object and Fund Type.
    - **BudgetAllotmentSchedule**: The Budget Allotment Schedule document is used to break down the annual budget, by Division, Fund, and Object, across the 12 periods for the upcoming Budget Year.

…2f. User Access Request: Comments/Manager

3. Comments: You can enter descriptive text to support your request

4. Manager Detail: Here you provide contact details for your line supervisor/manager.
- **Please Select**: Click the dropdown and selected your manager from the list
- **Contact Phone**: Optionally, enter your manager's phone number for contact.
- **Email**: Optionally, enter your manager's valid contact email address.
- **Mobile Phone**: Optionally, enter your manager's cell/mobile phone number for contact.

…2g. User Access Request: Administrator Role

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech Active Directory & Email User Request
2.	**User**	**Login to the Budget module and complete a User Access Request** **GFMIS Budget Module**
3.	BBMR	Review User Access Request and Approve or Reject
4.	User	Login to the Budget module and commence working

If you need to be granted the Administrator role you can request this by entering the request in the Comments field. BBMR will review the request and respond.

…2g. User Access Request: Submit

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech *Active Directory & Email User Request*
2.	**User**	**Login to the Budget module and complete a User Access Request** **GFMIS Budget Module**
3.	BBMR	Review User Access Request and Approve or Reject
4.	User	Login to the Budget module and commence working

Once you have completed your User Access Request, you submit it to BBMR for their review and approval. To do that, you click the Submit icon on the toolbar just below the menu tabs.
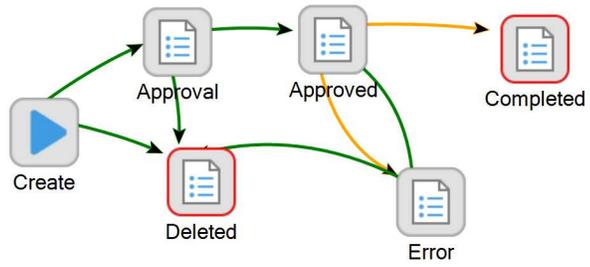
3. BBMR Review

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech Active Directory & Email User Request
2.	User	Login to the Budget module and complete a User Access Request GFMIS Budget Module
3.	**BBMR**	**Review User Access Request and Approve or Reject**
4.	User	Login to the Budget module and commence working

A BBMR Administrator will receive the submitted User Access Request in their Work Tray. They will open the document, review and take the appropriate actions as discussed in the User Management training module.

Workflow

4. Login to the Budget Module

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech Active Directory & Email User Request
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Supported browsers
✓ New Edge (Chromium-based)
✓ Chrome
✓ Firefox

Not Supported
✕ Old Edge
✕ Internet Explorer

Pop-up blockers
Please ensure pop-up blockers are disabled for the site in your browser. Refer to your browser documentation for information on allowing pop-ups.

After BBMR have advised you that your User Access Request has been approved, you can log in to the Budget module using your internet browser. The application supports the latest versions of the most common web browsers; Microsoft Edge, Chrome, and Firefox.

Microsoft's Internet Explorer and the old version of Edge are not supported.

The application uses pop-ups, so please disable pop-blockers in your browser. Refer to your browser documentation for information on how to do that.

The address for the Budget module is: http://10.1.32.4/Budget-TST
Now when you login to the application you will see all the menu tabs:
- **Work Tray**: This is the application's central hub for document retrieval and workflow management. This feature is used daily to retrieve documents for update, review, approval and workflow progression. Bu default, it lists all documents that you are working on, which initially will be empty.
- **Budget Execution**: This gives access to creating the documents used in managing the Budget; The Budget Allotment Schedule, and Appropriation/Allotment Modification.
- **Administration**: Most users will only see the User Access Request Document under this tab, but Administrators will have access to the system administration documents as well.
- **Reports**: This tab opens the application's report portal.

Changing Access Permissions

Step	Who	Action
1.	User	Submit Active Directory User Request to OTech Active Directory & Email User Request
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4.	User	Login to the Budget module and commence working

It's quite possible that over time you will need to update your permissions, whether that is because your role has changed, or your Division/Department of responsibility has changed.

Simply login to the budget module and complete a new User Access Request. Make sure to deselect any Roles, Organization items, or Templates you no longer require, and select the new options that you do need.

If you no longer want access to the Budget Module, uncheck the Active checkbox.

Submit the document for review by BBMR.

Agenda

Registering for the Application

Q&A

Thank you for undertaking the lesson:
Accessing the Application

Please complete the survey:
https://s.surveyplanet.com/enve289v