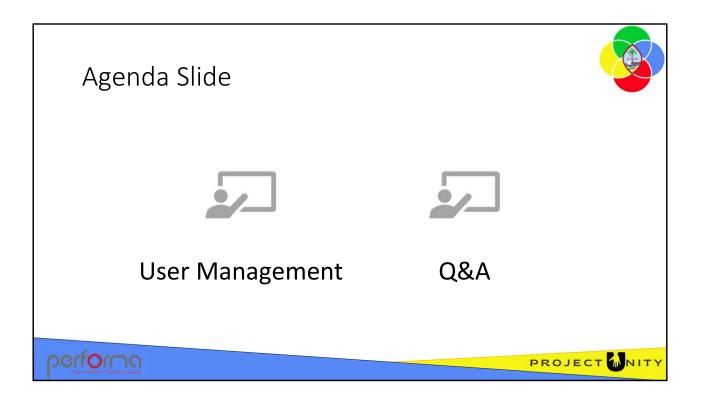
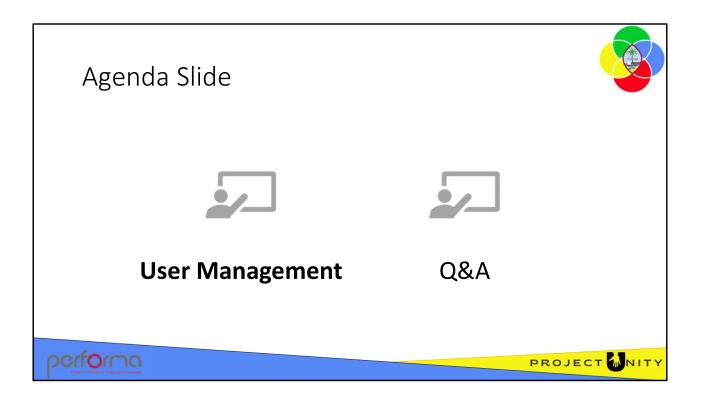


	Lesso	on Details			
	2	Learning Objectives:	To provide Administrators with the knowledge to add and maintain users within the Budget module.		
	Ō	Duration:	30 minutes		
	÷	Pre-requisites:	1.002 Accessing the Application		
	٦.	Recommended:	None		
perf	í <mark>o</mark> rno		PROJECT MIT	Y	





Who Action User Submit Active Directory User Request to OTech Active Directory & Email User Request Image: Comparison of the second of the secon	• Second of Second 4: COSC (Second Academic Second Academic
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GFMIS Budget Module	
BBMR Review User Access Request and	
Approve or Reject	
User Login to the Budget module and commence working	
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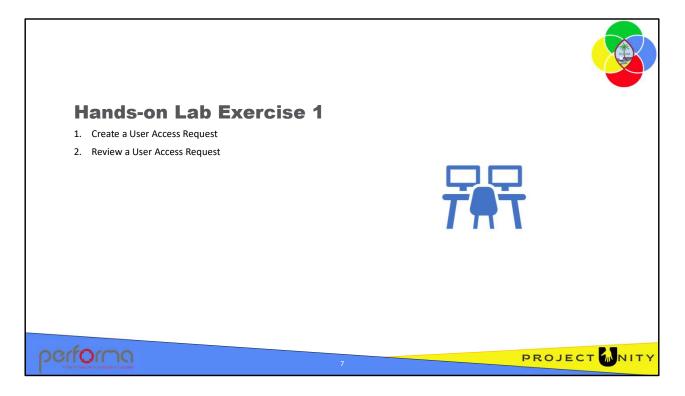
The first steps in the User Management process are carried out by the user, As discussed in the Accessing the Application training module, the user requests an Active Directory account from OTech (if they don't already have one) and then accesses the Budget Module and submits a User Access Request document.

Step	Who	Action	Work Tray
1.	User	Submit Active Directory User Request to	Global Worksny, Analabie To Calm V Pendito V Newton's State I = v Availabie .
		OTech Active Directory & Email User Request	Work Item Name Infrash Assocs Y Work Item Code Workflow Step
2.	User	Login to the Budget module and	UK255 In III UK255 In IIII UK255 In III UK255 UK25 UK255 UK25 UK255 UK25 UK255 UK25 UK25 UK25 U
		complete a User Access Request	
		GFMIS Budget Module	•
3.	BBMR	Review User Access Request and	(We Two Conferences Advances Another Conferences)
4.	User	Approve or Reject Login to the Budget module and	User Access Request
ч т .	0361	commence working	USEI ALUESS REQUEST
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Once a user has submitted a User Access Request, an Administrator will see it in their Work Tray as at the Available Workflow Step and with a Workflow State of Available. The Work Item Name will be like UAR.[*nn*]-[*FullName*] (for example, UAR.59-Joanne Smith.

The internal checks required by BBMR are beyond the scope of this training, however in general the Administrator will then:

- 1. Claim the document
- 2. Review the access requested by the user, paying particular attention to the Role(s), Organization(s), and Templates they've requested. If necessary, contact the user's line supervisor/manager to clarify or confirm the request.
- 3. Enter some comments in the Approval Comments text box.
- 4. Submit the document, The available submission paths are Approve, Delete, or Save and Release (which allows you to save any changes you've made and release your claim on the document). When Approved, the specified options are granted within the Budget Module.



Objective

- 1. Create a User Access Request to modify your Organization access permissions
- 2. Review a User Access Request

Duration: 10 minutes

Process

Create a User Access Request

- 1. From the Administration menu, select User Access Request
- 2. Click the Organization lookup, and either de-select an option or select an additional option
- 3. Click the Submit icon and select the Submit for Approval submission path

Review a User Access Request

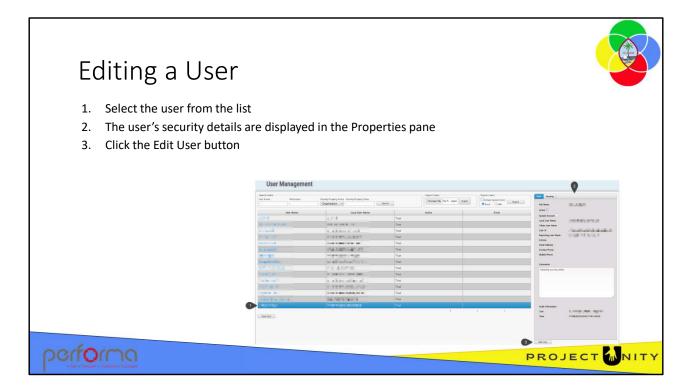
- 1. From the Work Tray, claim a User Access Request document
- 2. Review the information provided
- 3. Click the Submit icon and select the Approve submission path

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	Jser	Submit Active Directory User Request to		Local User Name		Adive	truel	Active System Account	1.00
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The User Access Request document does not provide an option to request that they be given the Administrator role. This prevents a user getting that role inadvertently if the request is approved without a thorough review.

A user can request they be made an Administrator by any means of communication with BBMR (for example, email or verbal), however, the recommended approach is that they enter a comment in the Comments field on the User Access Request document and submit the request.

To grant a user the Administrator role, an Administrator uses the User Management page from under the Administration menu tab. This page presents a list of all users within the application and allows an Administrator to set a user's roles and permissions directly.



To edit a user's security properties, first find and select the user from the user list. Then click the Edit User button under the Properties pane.

Pro	oper	ties Pane								
	Main Security			Main Security						
	User Id	Charles and the second		Security Properties		Effective Permissions				
	Full Name			Property Name	Property Value	AppropriationAllotmentMod_v001				
	Active 🗹			Organization	100 of 3334 selected *	BudgetAllotmentSchedule_v001				
	System Account			User Role	Entity Analyst *	UserManagement_v001				
	Local User Name	(PRODUCT)		Template	5 of 12 selected *	UserRegistration_v001				
	Token User Name				[]	SysUserActive				
					V Add Add All	Org0101				
	Reporting Uper Name	(and the state of				Org0201				
	Culture	Not specified		No Explicit Pe	ermissions Defined	Org0301				
	Email Address									
	Contact Phone					Org01				
	Mobile Phone					Org02				
						Org03				
	Comments					EnAn				
	Added by security utility					AppropriationAllotmentMod_v001_EnAn				
						BudgetAllotmentSchedule_v001_EnAn				
						UserManagement_v001_EnAn				
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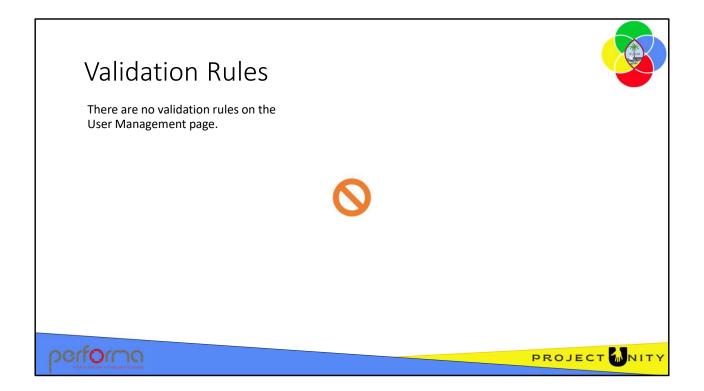
To edit a user's security properties, first find and select the user from the user list. Then click the Edit User button under the Properties pane. The Properties pane has two tabs; Main and Security.

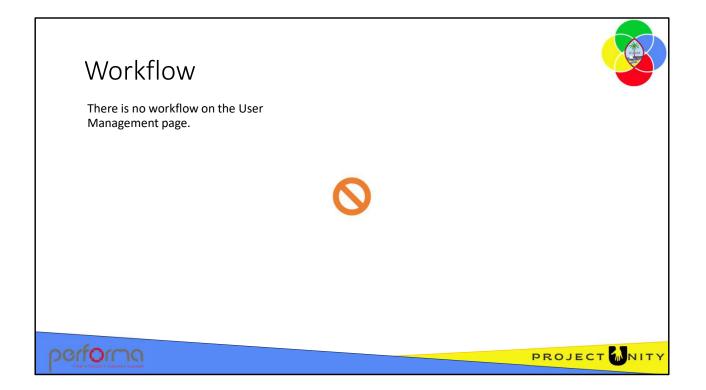
- **Main**: Usually, the only thing that you would change on the Main tab is the Active flag. When a user no longer requires access to the Budget Module you can disable their access by unchecking this. If they need access again later, you can simply reset them as Active
- **Security**: The Security tab is where the user's roles and security properties are managed.
 - In the Security Properties are, you can modify the user's Organization access, their role, and which document templates the user can access.
 - You should not modify anything in the Explicit Permissions area except on advice from a Support analyst.

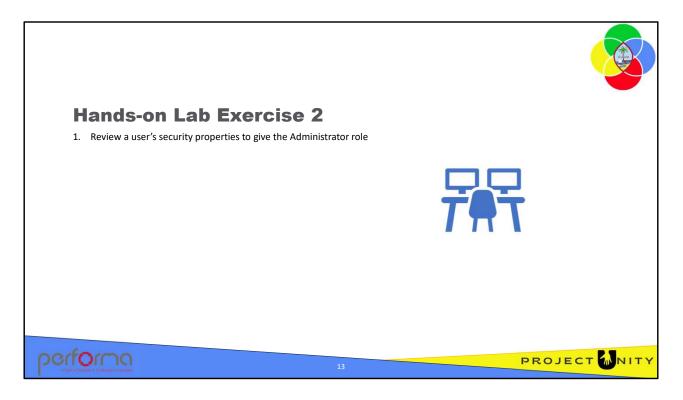
To grant a user the Administrator role:

1. Click the User Role dropdown and deselect their current role, then select the Administrator role. If not, the lesser role will be applied.

2. Click the Template dropdown and select each template the user will be able to access. Typically, an Administrator will have access to all templates.







Objective

1. To review editing a user's security properties to give the Administrator role

Duration: 5 minutes

Process

- 1. From the Administration menu, select User Management
- 2. Search for your User Name and select it
- 3. Click the Edit User button below the Properties pane
- 4. On the Security tab, click the User Role lookup
- 5. Scroll down the list and note that the Administrator option is checked. Check this option to give the user the Administrator role. Note: all other roles should also be unchecked!
- 6. Click Cancel

