
User Management
4.002
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# Lesson Details

| | |
|---|---|
| Learning Objectives: | To provide Administrators with the knowledge to add and maintain users within the Budget module. |
| Duration: | 30 minutes |
| Pre-requisites: | 1.002 Accessing the Application |
| Recommended: | None |

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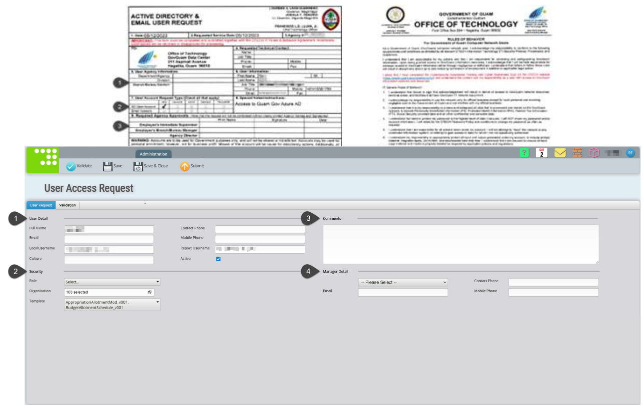
# User Steps

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

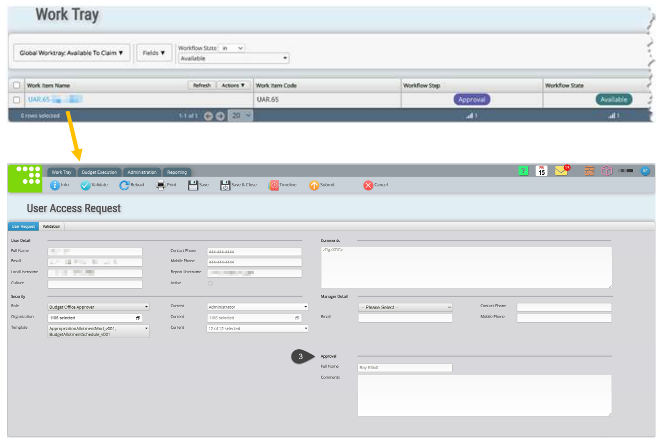





The first steps in the User Management process are carried out by the user, As discussed in the Accessing the Application training module, the user requests an Active Directory account from OTech (if they don't already have one) and then accesses the Budget Module and submits a User Access Request document.

# Review User Access Request

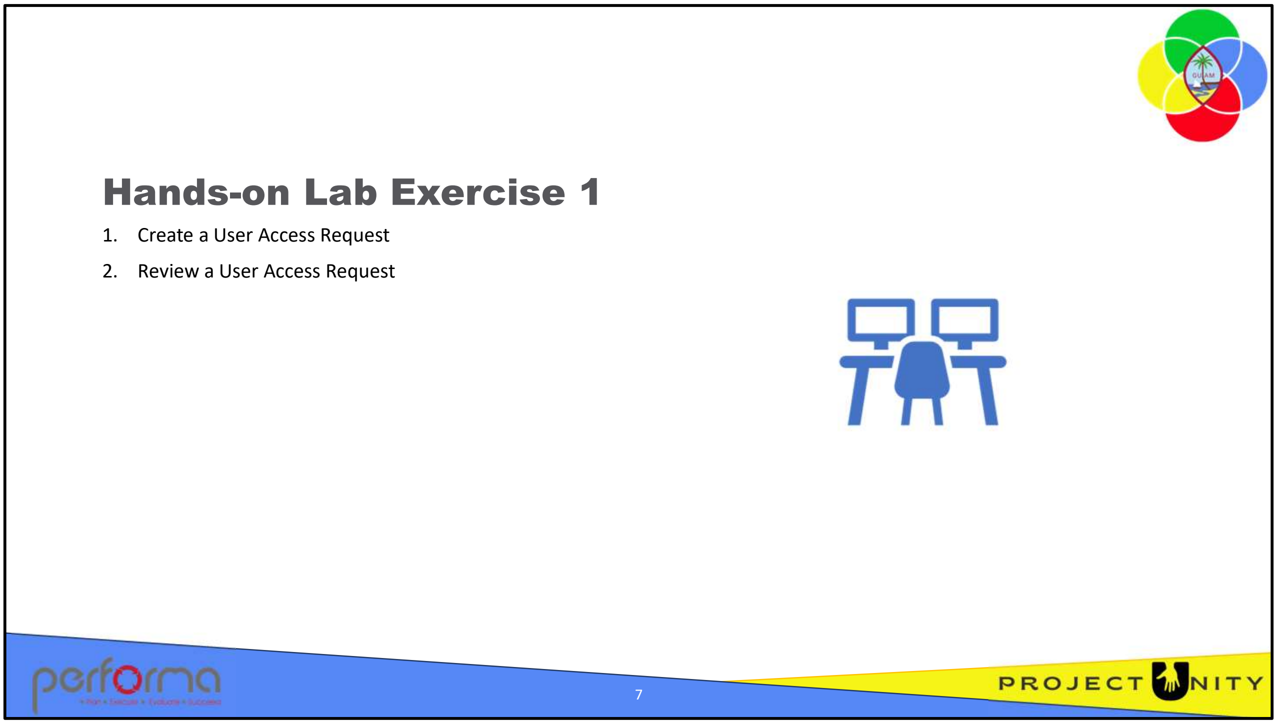
| Step | Who | Action |
|---|---|---|
| 1. | User | Submit Active Directory User Request to OTech<br>Active Directory & Email User Request |
| 2. | User | Login to the Budget module and complete a User Access Request<br>GFMIS Budget Module |
| **3.** | **BBMR** | **Review User Access Request and Approve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




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***

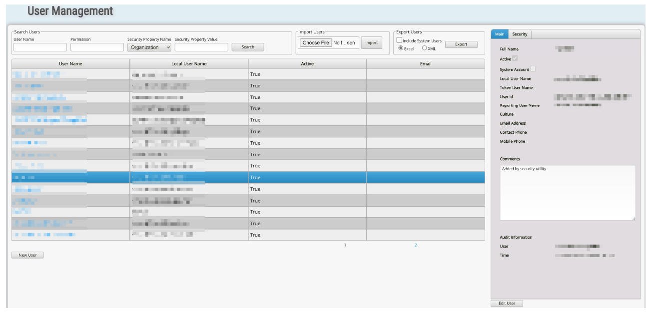
1. From the Administration menu, select User Access Request
2. Click the Organization lookup, and either de-select an option or select an additional option
3. Click the Submit icon and select the Submit for Approval submission path

***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

# Granting Administrator Role

| Step | Who | Action |
|---|---|---|
| 1. | User | Submit Active Directory User Request to OTech |
| 2. | User | Email BBMR to be given access to the Budget module |
| **3.** | **BBMR** | **Create user and assign user role and security properties** |
| 4. | User | Login to the Budget module |



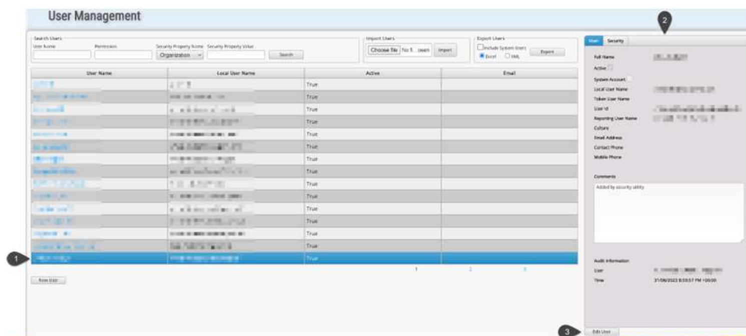

The User Access Request document does not provide an option to request that they be given the Administrator role. This prevents a user getting that role inadvertently if the request is approved without a thorough review.

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.

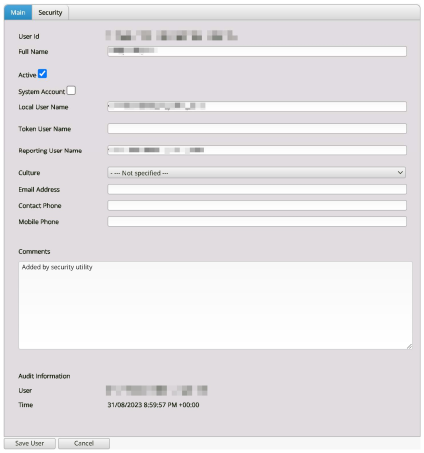
# Editing a User

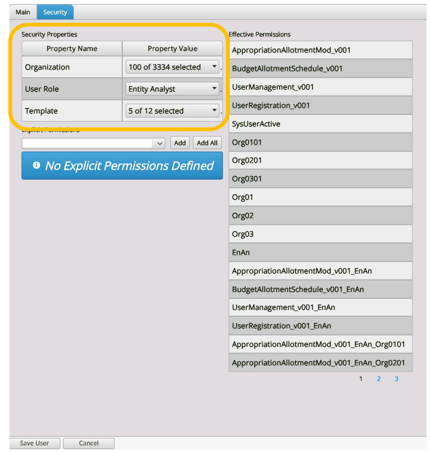
1. Select the user from the list
2. The user’s security details are displayed in the Properties pane
3. Click the Edit User button




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.

## Properties Pane

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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.

# Validation Rules

There are no validation rules on the User Management page.

# Workflow

There is no workflow on the User Management page.

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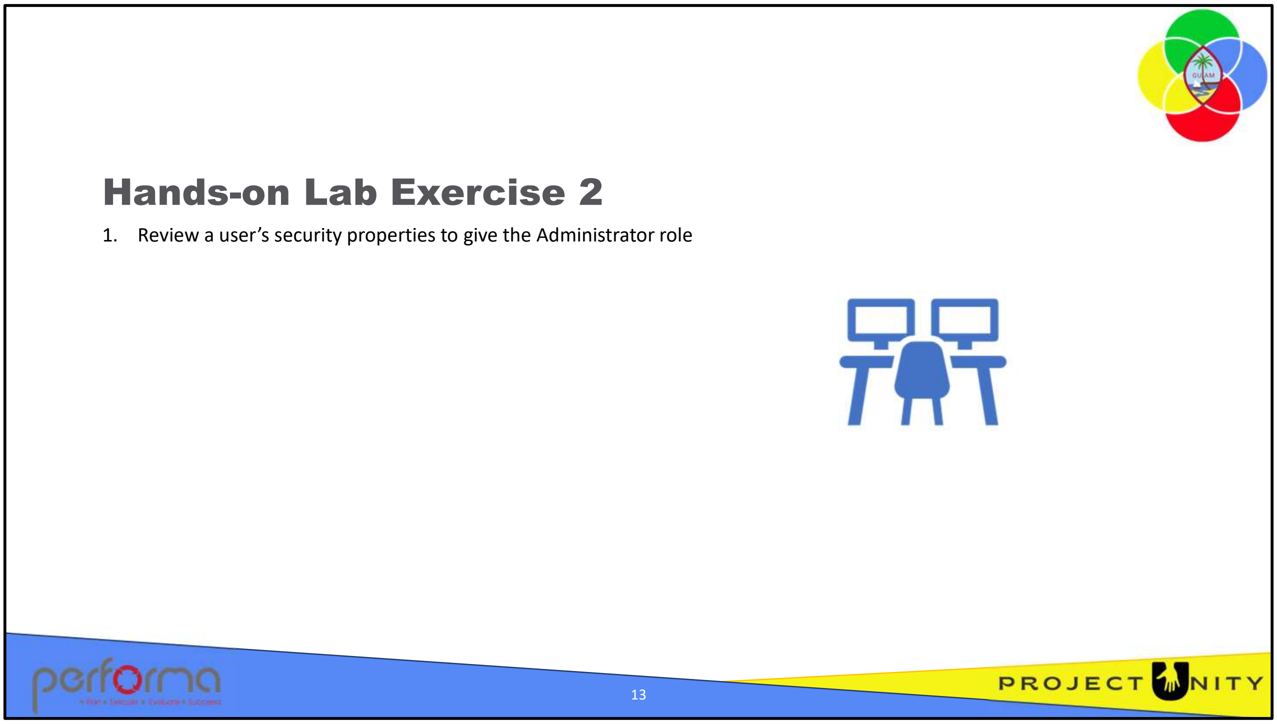


**Objective**

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

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Thank you for undertaking the lesson:
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