



NEW MEXICO
Public Education Department

OBMS USER MAINTENANCE MANUAL

2012

PREFACE

The Operating Budget Management System (OBMS) User Maintenance Manual is designed to assist Business Managers with setting up New Users, De-Activating Previous Users and the Maintenance of Existing Users in OBMS.

TABLE OF CONTENTS

	Page
Section I.....OBMS User Roles Defined.....	2-3
Section II..... How to Access your Personnel Reports.....	4-6
Section III.....How to Create New Users.....	7-14
Section IV.....How to Edit Current Users.....	15-20
Section V.....How to De-Activate Current Users.....	20-25
Section VI.....Resetting Passwords.....	25-26

- I. **OBMS User Roles Defined** - These are the definitions of the roles in OBMS along with the access and limitations they provide for Reports, Actuals, Budget, Budget Adjustment Requests (BARs) and Requests for Reimbursements (RfRs).
1. **View Only – V**: The View Only role has access to View Actuals, Budget, BAR and RfR Reports. Generally this role is assigned to Auditors and PED staff. This role does not give access to Create, Edit, Approve or Submit a BAR, RfR, Actuals or Budget.
 2. **School District – SD**: The School District role can View all Reports. They also have access to upload Actuals and Budgets as well as Create or Edit BARs and RfRs. They do not have access to Submit a BAR, RfR, Actuals or Budget. They can only prepare a BAR or RfR for submission to the Business Manager. Generally this role is assigned to bookkeepers and office clerks within the District’s Business Office.
 3. **Charter School – CS**: The Charter School role can View all Reports. They also have access to upload Actuals and Budgets as well as Create or Edit BARs and RfRs. They do not have access to submit a BAR, RfR, Actuals or Budget. They can only prepare a BAR or RfR for submission to the Business Manager. Generally this role is assigned to bookkeepers and office clerks within the Charter’s Business Office.
 4. **Superintendent – S**: The Superintendent role can View all Reports. They also have access to upload Actuals and Budgets as well as Create or Edit BARs and RfRs. They do not have access to submit a BAR, RfR, Actuals or Budget. They can only prepare a BAR or RfR for submission to the Business Manager. Generally this role is assigned to the District Superintendent or Charter School Head Administrator.
 5. **Business Manager – BM**: The Business Manager role has access to View all Reports. They also have access to upload Actuals and Budgets as well as Create or Edit BARs and RfRs. This is the only role with permission to Submit BARs, RfRs, Actuals or Budget in OBMS. The Business Manager also has access to Create, Edit or De-activate users. They can also create contacts for BARs and RfRs. Generally this role is assigned to the District or Charter School Business Manager. ***The Business Manager role is the ONLY role with access to the OBMS User Maintenance functions.***

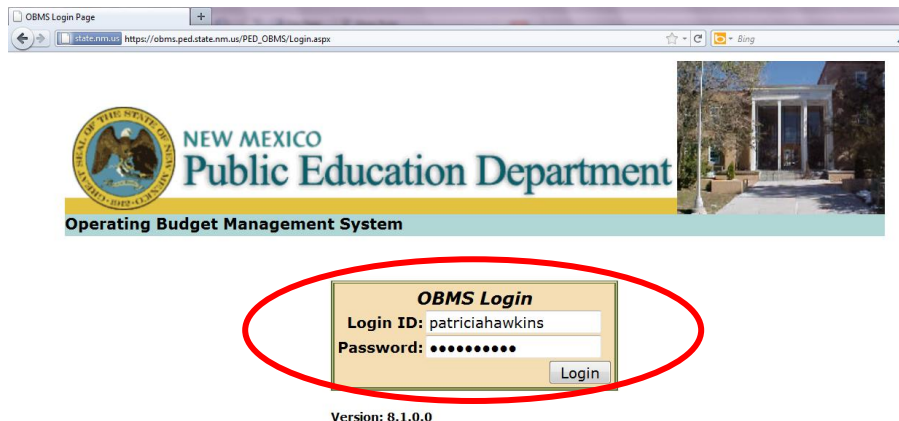
IMPORTANT: *The Public Education Department (PED) OBMS User Administrator(s) must initially assign the Business Manager role in OBMS.*

6. **District Program Manager – DPM**: The District Program Manager role only applies to Districts with LOCAL Charter Schools. This role gives access to Approve or Disapprove RfRs submitted by the District's Dependent Charter(s). This role must approve RfRs before the District Fiscal Manager. Generally this role is assigned to the District's Program Manager but can be assigned to the Business Manager if the District does not have a Program Manager.
7. **District Fiscal Manager – DFM**: The District Fiscal Manager role only applies to Districts with LOCAL Charter Schools. This role gives access to Approve or Disapprove RfRs submitted by the District's Dependent Charter(s). This role cannot approve RfRs before the District Program Manager. Generally this role is assigned to the District's Fiscal Manager or the Business Manager if the District does not have a Fiscal Manager.

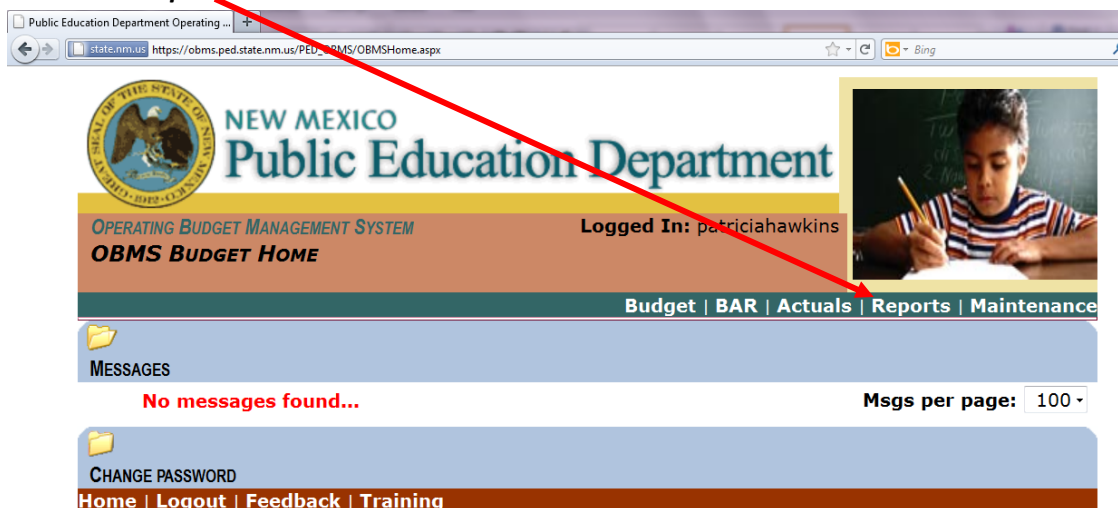
II. How to Access your Personnel Reports

Before you begin updating or maintaining Users in OBMS we recommend you review the existing users in OBMS for your District or Charter. The first step in this process is as follows:

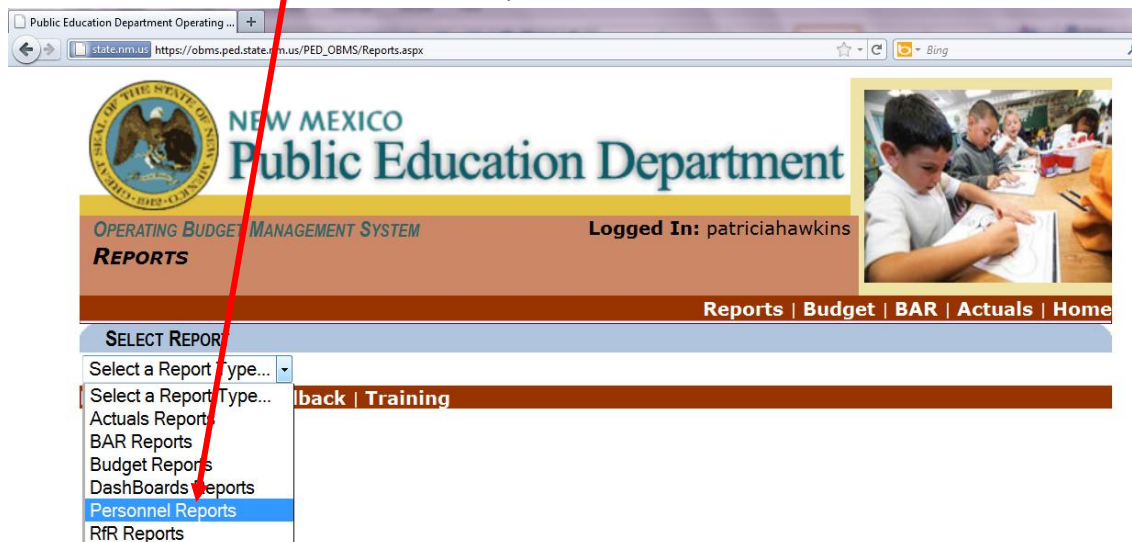
Step 1: Log in to OBMS.



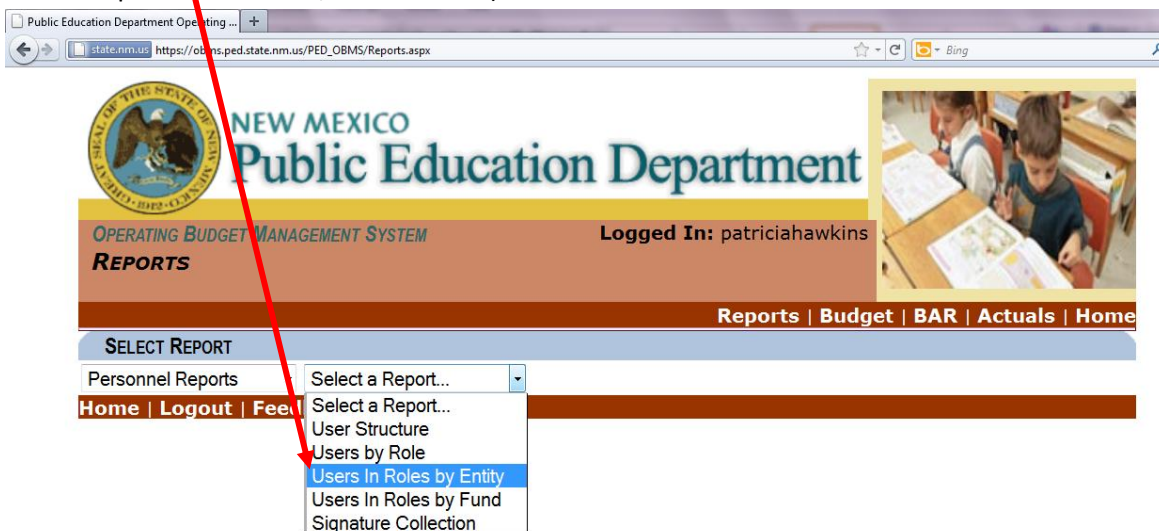
Step 2: Click on **Reports**.



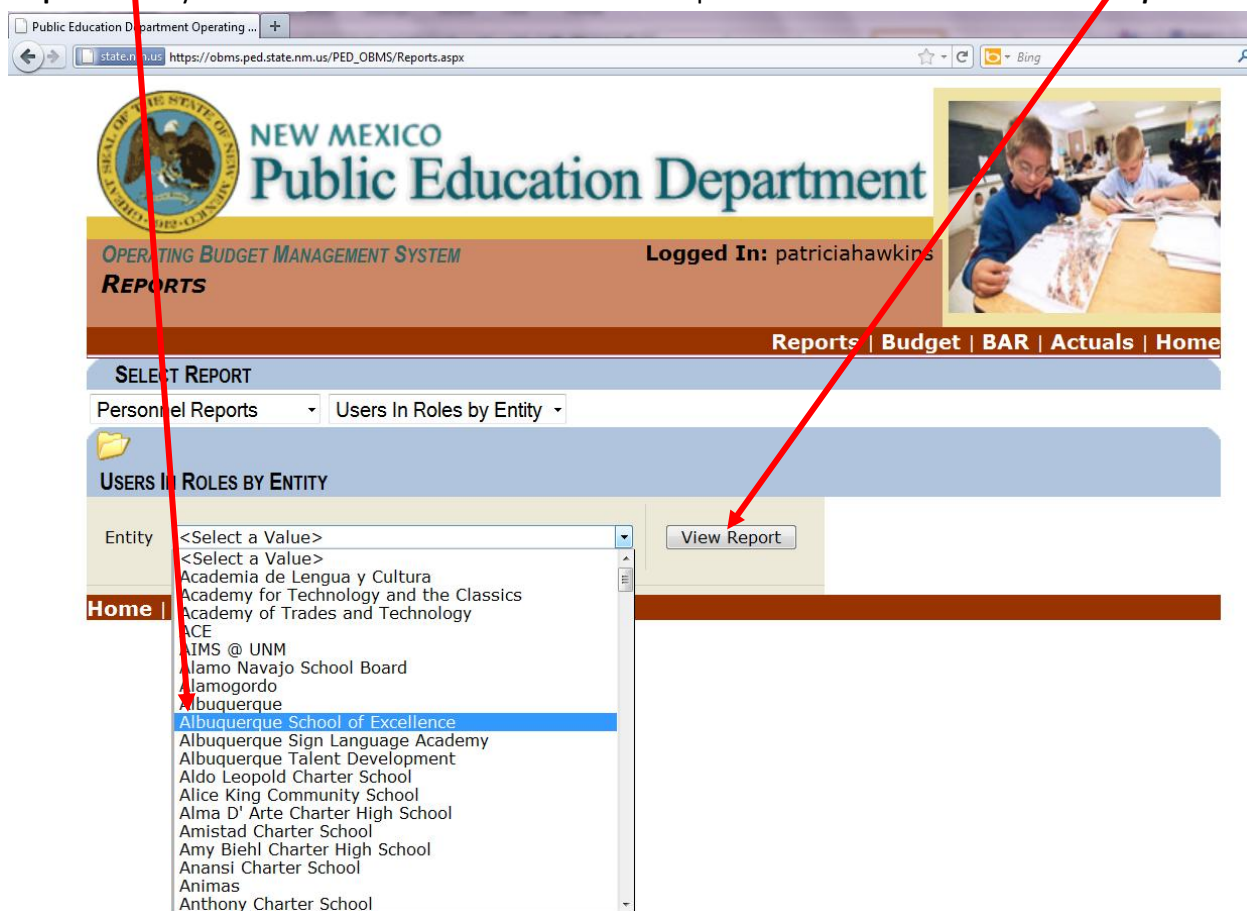
Step 3: Select **Personnel Reports** from the drop-down menu.



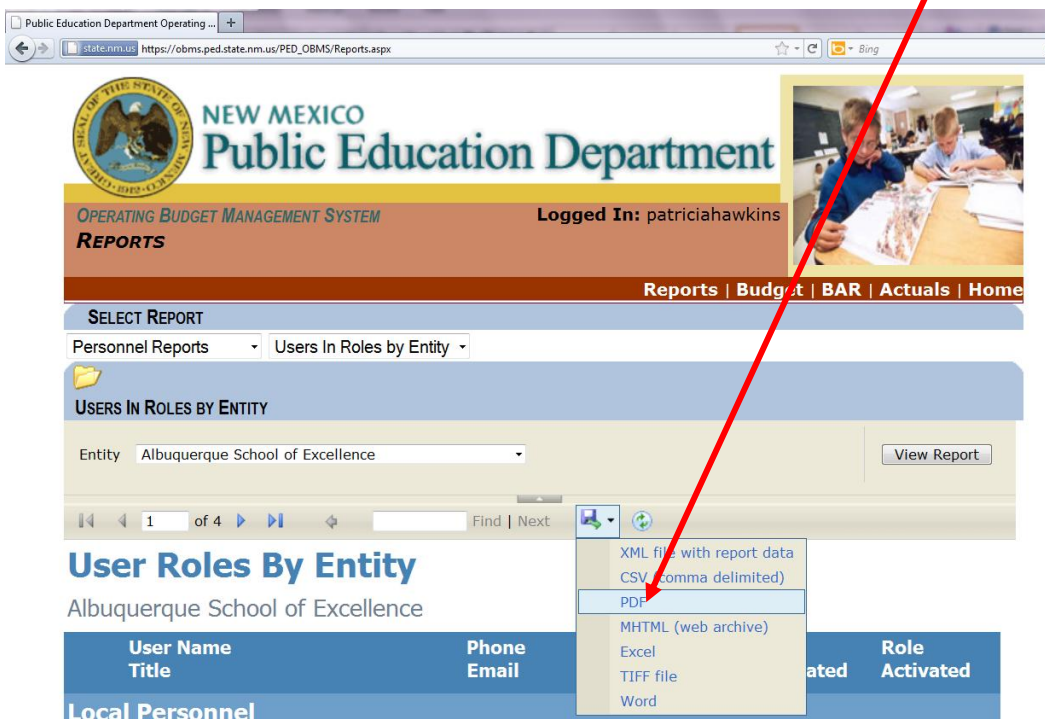
Step 4: Select *Users in Roles by Entity* from the drop-down menu. (You also have the option to run a Personnel Report by *Structure, Role* or *Fund*.)



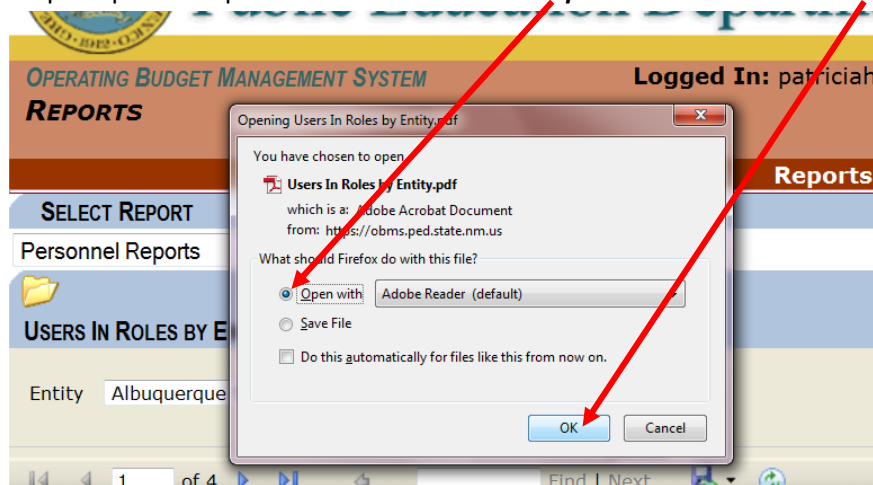
Step 5: Select your *District or Charter School* from the drop-down menu and then Click **View Report**.



Step 6: The report opens as shown below. You can now Print the report by Selecting **PDF** from the drop-down menu.



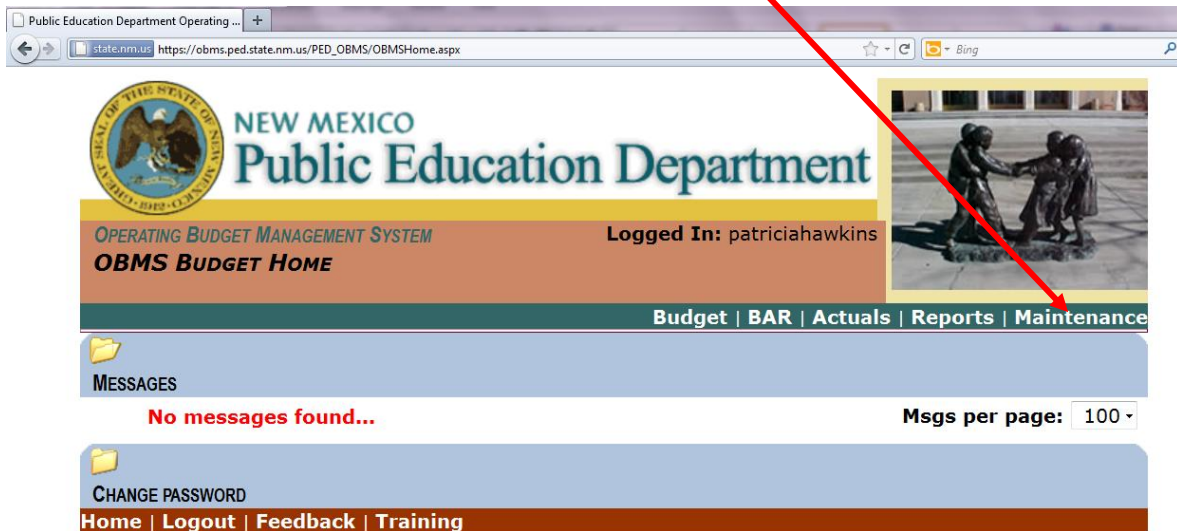
Step 7: You will be prompted to Open or Save the file. Select **Open with** and Click on **OK**.



Once the report opens you can print it so that you can examine who is assigned to your District or Charter School by Role, Structure or Fund. Keep in mind you only have access to Edit the V, SD, CS, S, BM, DPM and DFM roles in OBMS as defined in Section I. The **User Roles by Entity** report also lists PED Personnel. If you have PED Personnel changes you must contact a PED User Administrator.

III. How to Create New Users

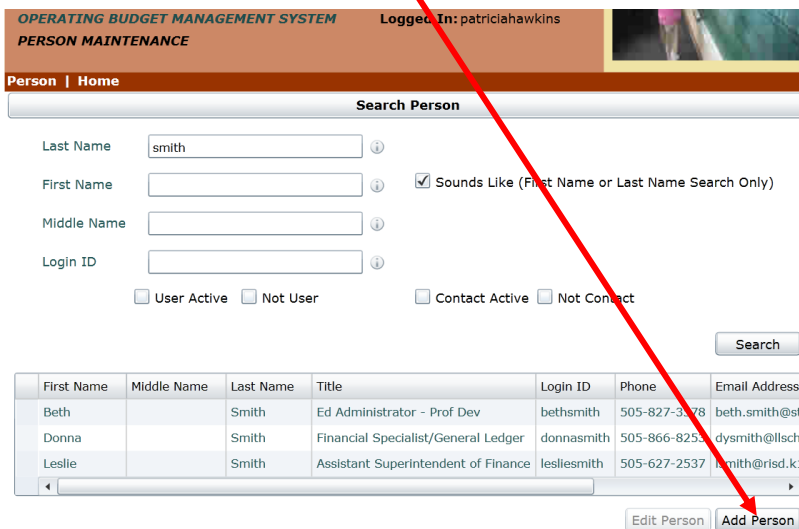
Step 1: After you login as the Business Manager, Click on **Maintenance**.



Step 2: Enter the **Last Name** of the New User. We recommend you Select the **Sounds Like** box. Then Click on **Search**.

The screenshot shows the 'PERSON MAINTENANCE' page. The 'Search Person' section contains input fields for 'Last Name', 'First Name', 'Middle Name', and 'Login ID'. The 'Last Name' field contains the text 'smith'. Below these fields are checkboxes for 'User Active', 'Not User', 'Contact Active', and 'Not Contact'. A checkbox labeled 'Sounds Like (First Name or Last Name Search Only)' is checked. A red arrow points from the 'Last Name' input field to the 'Search' button. A purple arrow points from the 'Sounds Like' checkbox to the 'Search' button. A red arrow points from the 'Search' button to the 'Search' button.

Step 3: OBMS will Search for the last name and generate a list of all Users with the same last name (see below). If the New User is not on the list Click on **Add Person**.



OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person

Last Name ⓘ
First Name ⓘ ☒ Sounds Like (First Name or Last Name Search Only)
Middle Name ⓘ
Login ID ⓘ

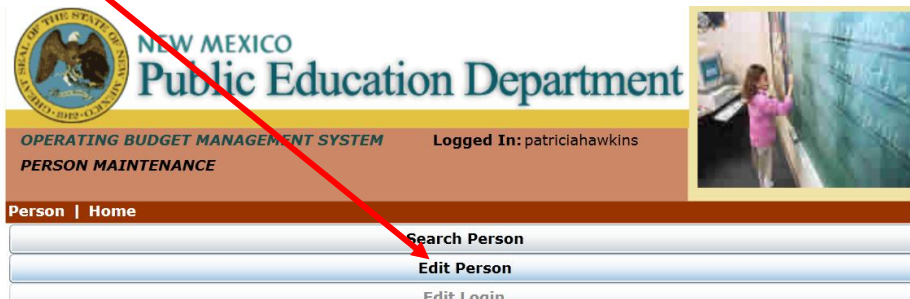
☐ User Active ☐ Not User ☐ Contact Active ☐ Not Contact

Search

First Name	Middle Name	Last Name	Title	Login ID	Phone	Email Address
Beth		Smith	Ed Administrator - Prof Dev	bethsmith	505-827-3378	beth.smith@st
Donna		Smith	Financial Specialist/General Ledger	donnasmith	505-866-8253	dysmith@llsch
Leslie		Smith	Assistant Superintendent of Finance	lesliesmith	505-627-2537	smith@risd.k

Edit Person Add Person

Step 4: Click on **Edit Person**.



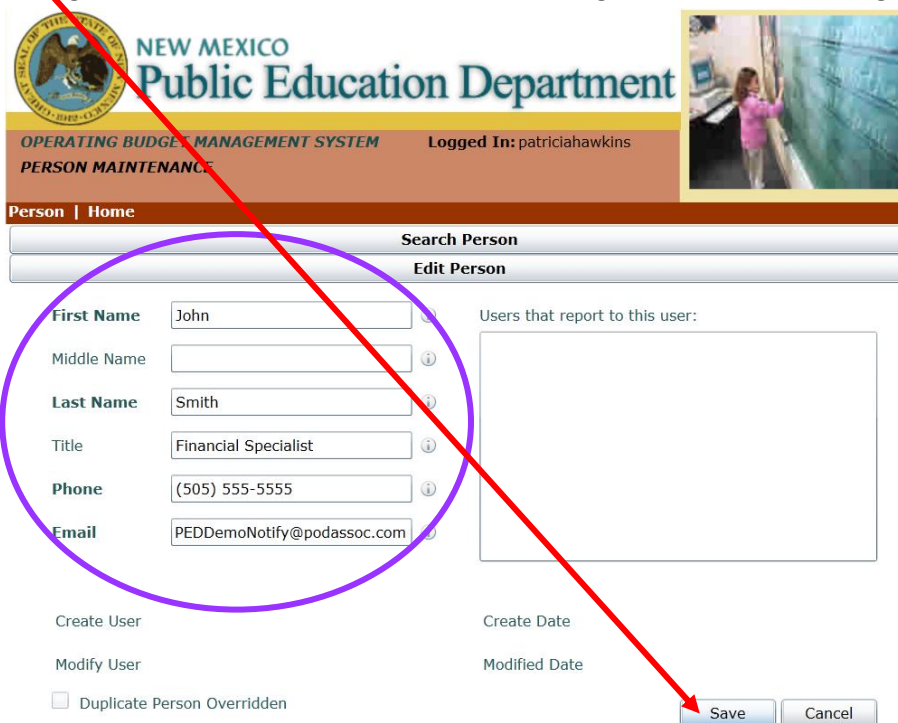
NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person
Edit Person
Edit Login

Step 5: Enter the New OBMS User's **First Name**, **Last Name**, **Title**, **Phone** number and **Email** address. Then Click on **Save**. (Important: BEFORE you SAVE verify the First and Last Name. OBMS automatically creates your User Login ID based on this information. A User's Login ID CANNOT be changed.)



NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person
Edit Person

First Name ⓘ
Middle Name ⓘ
Last Name ⓘ
Title ⓘ
Phone ⓘ
Email ⓘ

Users that report to this user:

Create User Create Date
Modify User Modified Date

☐ Duplicate Person Overridden

Save Cancel

Step 6: Click on **Edit Login**.

Person Maintenance Page

https://obms.ped.state.nm.us/PED_OBMS/SilverlightMaintenance.aspx?xapmodule=SLPersonMaintenance#/Views/PersonMaintenancePage.xaml

NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 7: To generate an email to the new user with a temporary password from OBMS Click on **Save Login**.

Person Maintenance Page

https://obms.ped.state.nm.us/PED_OBMS/SilverlightMaintenance.aspx?xapmodule=SLPersonMaintenance#/Views/PersonMaintenancePage.xaml

NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Person | Home

Edit Person: John Smith

Edit Login: John Smith

User Login <new>

Activate Date 2/9/2012

De-Activate Date <M/d/yyyy>

☒ Receive Messages ☐ Batch Email

☐ Receive Email ☐ Hide in Reports

Signature Date <M/d/yyyy>

Create User Create Date

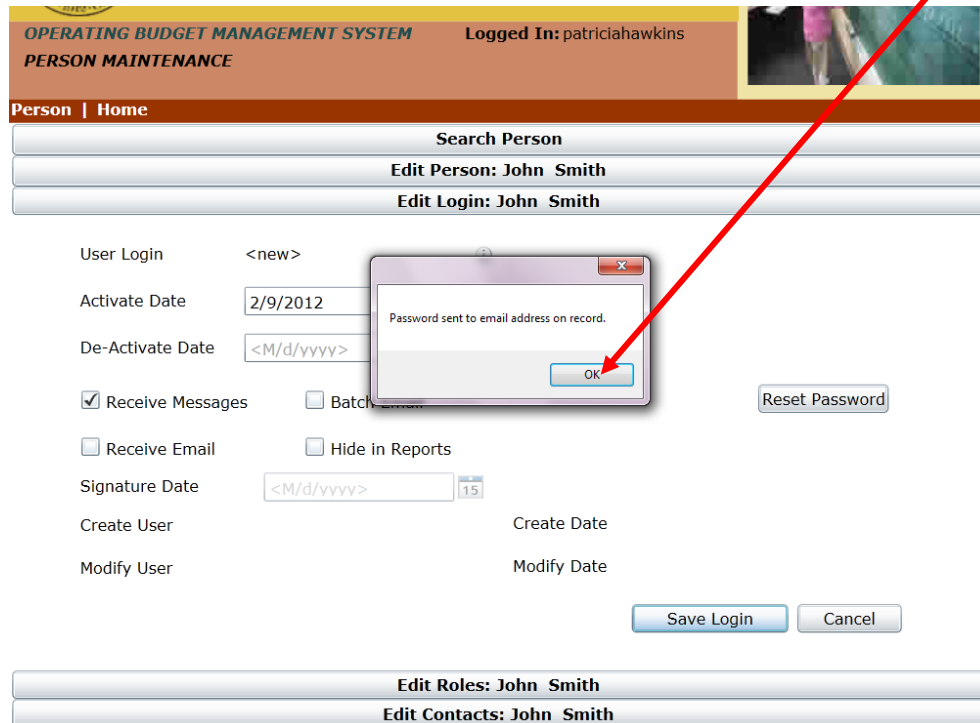
Modify User Modify Date

Save Login **Cancel**

Edit Roles: John Smith

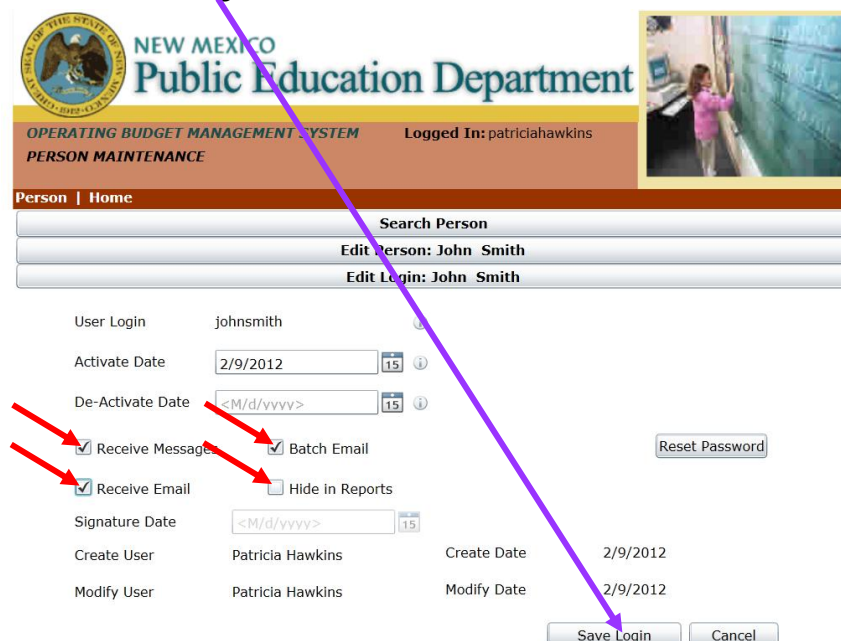
Edit Contacts: John Smith

Step 8: A message will appear saying **Password sent to email address on record.** Click **OK**.



The screenshot shows the 'PERSON MAINTENANCE' screen in the 'OPERATING BUDGET MANAGEMENT SYSTEM'. The user is logged in as 'patriciahawkins'. A modal dialog box is displayed in the center with the message 'Password sent to email address on record.' and an 'OK' button. A red arrow points from the 'OK' button to the text in Step 8. The background form shows fields for 'User Login' (set to '<new>'), 'Activate Date' (2/9/2012), 'De-Activate Date' (<M/d/yyyy>), and checkboxes for 'Receive Messages', 'Batch Email', 'Receive Email', and 'Hide in Reports'. There are also buttons for 'Reset Password', 'Save Login', and 'Cancel'.

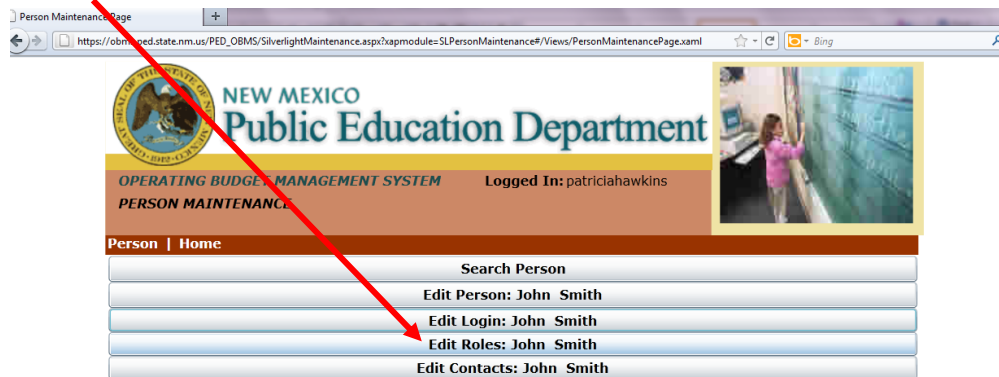
Step 9: Select the box next to **Receive Messages** and/or **Batch Email** and/or **Receive Email** (see descriptions below). Then Click **Save Login**.



The screenshot shows the 'PERSON MAINTENANCE' screen for user 'johnsmith'. The 'Receive Messages', 'Batch Email', and 'Receive Email' checkboxes are all checked. A purple arrow points from the 'Save Login' button to the text in Step 9. Red arrows point to each of the three checked checkboxes. The background form shows fields for 'User Login' (johnsmith), 'Activate Date' (2/9/2012), 'De-Activate Date' (<M/d/yyyy>), and checkboxes for 'Receive Messages', 'Batch Email', 'Receive Email', and 'Hide in Reports'. There are also buttons for 'Reset Password', 'Save Login', and 'Cancel'.

- Receive Messages – This option will allow a User to see messages on the OBMS Home Page but will not send notifications to the Users email.
- Batch Email – This option will allow a User to receive one email on a daily basis that includes all the current day activities.
- Receive Email – This option will allow a User to receive OBMS notifications to their email address on record.
- Hide in Reports – This option will Hide a User in the Personnel Reports.

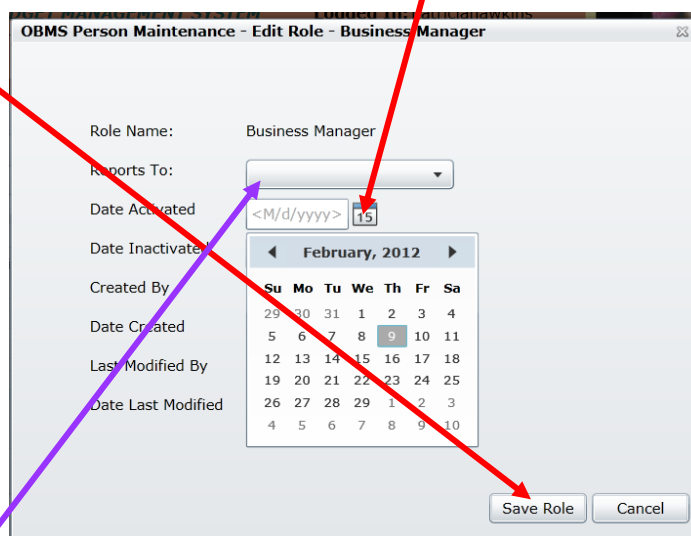
Step 10: Click on **Edit Roles**.



Step 11: Click on the **Edit** link, next to the Role you are assigning to the User.

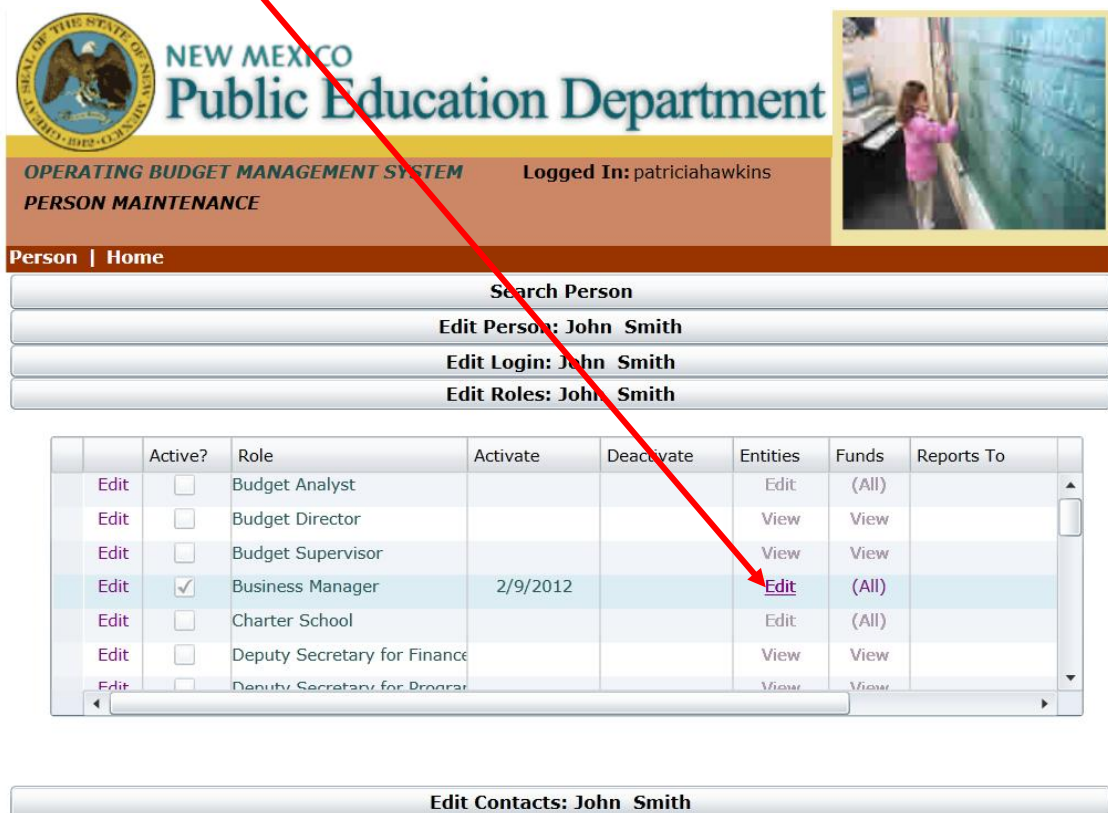


Step 12: Enter the **Date Activated** by Clicking on the **Calendar icon** and Selecting the **current date**. Then Click on **Save Role**.



Note: The **Reports To** drop-down menu will automatically populate once you have successfully assigned the Entity (refer to step 15).

Step 13: Click on the **Edit** link under *Entities* next to the role you are creating. (**Note:** The only roles that allow you to edit Funds are the DPM and DFM roles.)



NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

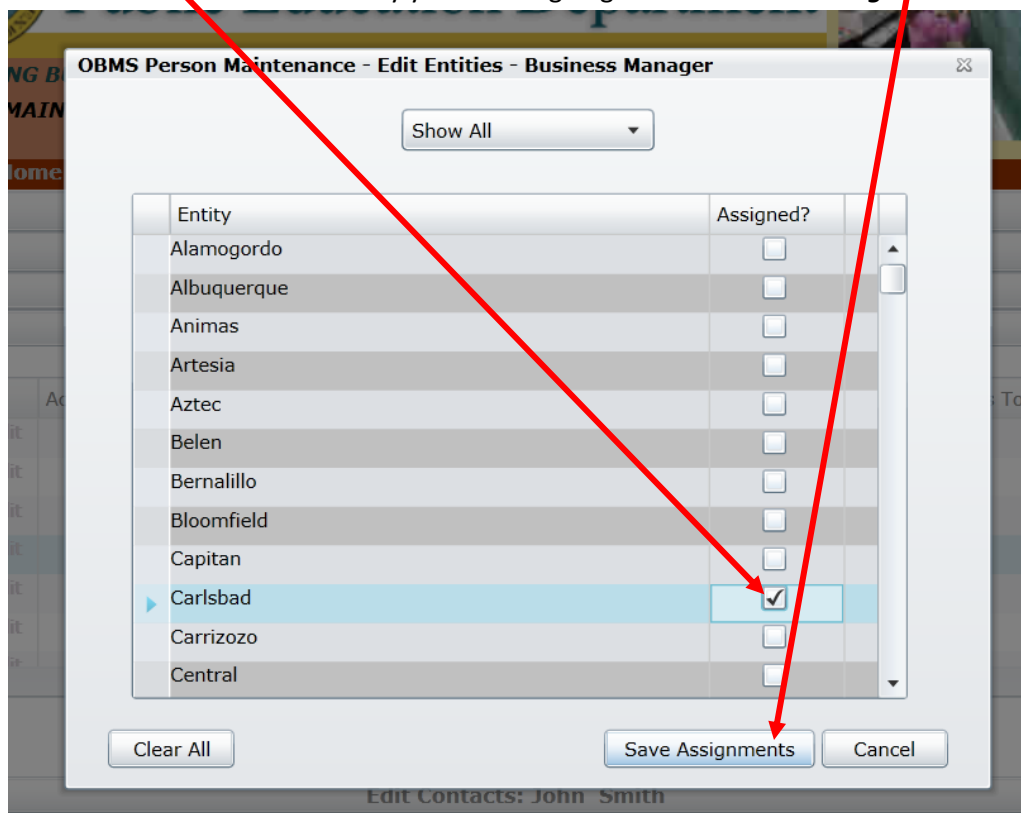
Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Budget Analyst			Edit	(All)	
Edit	<input type="checkbox"/>	Budget Director			View	View	
Edit	<input type="checkbox"/>	Budget Supervisor			View	View	
Edit	<input checked="" type="checkbox"/>	Business Manager	2/9/2012		Edit	(All)	
Edit	<input type="checkbox"/>	Charter School			Edit	(All)	
Edit	<input type="checkbox"/>	Deputy Secretary for Finance			View	View	
Edit	<input type="checkbox"/>	Deputy Secretary for Program			View	View	

Edit Contacts: John Smith

Step 14: Select the **Check Box** for the Entity you are assigning. Then Click **Save Assignments**.



OBMS Person Maintenance - Edit Entities - Business Manager

Show All

Entity	Assigned?
Alamogordo	<input type="checkbox"/>
Albuquerque	<input type="checkbox"/>
Animas	<input type="checkbox"/>
Artesia	<input type="checkbox"/>
Aztec	<input type="checkbox"/>
Belen	<input type="checkbox"/>
Bernalillo	<input type="checkbox"/>
Bloomfield	<input type="checkbox"/>
Capitan	<input type="checkbox"/>
Carlsbad	<input checked="" type="checkbox"/>
Carrizozo	<input type="checkbox"/>
Central	<input type="checkbox"/>

Clear All Save Assignments Cancel

Step 15: Now you can assign who the New User will *Report to*. Click on the **Edit** link, next to the Role.

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Budget Analyst			Edit	(All)	
Edit	<input type="checkbox"/>	Budget Director			View	View	
Edit	<input type="checkbox"/>	Budget Supervisor			View	View	
Edit	<input type="checkbox"/>	Business Manager			Edit	(All)	
Edit	<input type="checkbox"/>	Charter School			Edit	(All)	
Edit	<input type="checkbox"/>	Deputy Secretary for Finance			View	View	
Edit	<input type="checkbox"/>	Deputy Secretary for Program			View	View	

Step 16: Select the **User Name** from the drop-down menu next to *Reports To*. Click on **Save Role**.

OBMS Person Maintenance - Edit Role - Business Manager

Role Name: Business Manager

Reports To: [Perkowski, Gary](#)

Date Activated: (none)

Date Inactivated: [Perkowski, Gary](#)

Created By: OBMS Administration

Date Created: 2/9/2012

Last Modified By: Patricia Hawkins

Date Last Modified: 2/9/2012

[Save Role](#) [Cancel](#)

Step 17: Assign Contacts. This option is to be used to assign the New User as a contact for BARs and RfRs only. Click on **Edit Contacts**.

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 18: Select the **Entity**.

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Entity

Carlsbad De Los Ninos

Carlsbad

Carrizozo

Central

Central NM CC

Central REC #5

Select Contact Types

Type	Activation	DeActivation

Active Contact Assignments

Step 19: Select the *Activation* date for BARs and/or RfRs by Clicking the **Calendar icon** and Selecting the *current date*. Then Click **Save**. Repeat this step to assign this user as a contact for RfRs.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Contact Types

Type	Activation	DeActivation
BAR	<M/d/yyyy> 15	<M/d/yyyy> 15
RfR	February, 2012	15

Select Entity

- Carinos De Los Ninos
- Carlsbad
- Carrizozo
- Central
- Central NM CC
- Central REC #5

Active Contact Assignments

Save Cancel

After you have successfully edited and saved your contact information. The entity assigned will show in the *Active Contacts Assignments* box (shown below).

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Contact Types

Type	Activation	DeActivation
BAR	2/9/2012 15	<M/d/yyyy> 15
RfR	2/9/2012 15	<M/d/yyyy> 15

Select Entity

- Carinos De Los Ninos
- Carlsbad
- Carrizozo
- Central
- Central NM CC
- Central REC #5

Active Contact Assignments

- Carlsbad - BAR
- Carlsbad - RfR

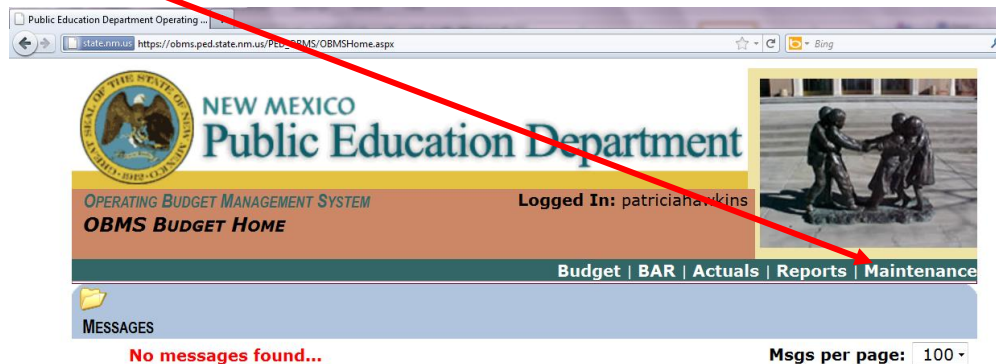
Save Cancel

Home | Logout

Generally not all Users will be assigned as a Contact. The Contact option is designed for personnel who supervise, manage or direct BARs and RfRs for specific funds.

IV. How to Edit Current Users: This option allows you to Edit an existing User's Login Information, Role or Contact Information.

Step 1: Click on **Maintenance**.



Step 2: Enter the **Last Name** of the User you are going to Edit. Click on **Search**. (Reminder: We recommend checking the **Sounds Like** box before you Click on **Search**.)

The screenshot shows the 'PERSON MAINTENANCE' search form. The 'Last Name' field contains 'smith'. The 'Sounds Like' checkbox is checked. A red arrow points from the 'Last Name' field to the 'Search' button. A purple arrow points from the 'Sounds Like' checkbox to the 'Search' button.

Step 3: Click on the **Users Name**. Then Click on **Edit Person**.

The screenshot shows the 'PERSON MAINTENANCE' search results page. The 'Last Name' field contains 'smith'. The 'Sounds Like' checkbox is checked. A table lists the search results. A red arrow points from the 'John' user name in the table to the 'Edit Person' button.

First Name	Middle Name	Last Name	Title	Login ID	Phone	Email Address
Beth		Smith	Ed Administrator - Prof Dev	bethsmith	505-827-3578	beth.smith@
Donn		Smith	Financial Specialist/General Ledger	donnasmith	505-866-8253	dysmith@llsc
John		Smith	Financial Specialist	johnsmith	(505) 555-5555	PEDDemoNo
Leslie		Smith	Assistant Superintendent of Finance	lesliesmith	505-627-2537	lsmith@risd.

Step 4: To Edit the *First Name, Last Name, Title, Phone number* or *Email* address Click on **Edit Person**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 5: Edit all applicable fields. Then Click on **Save**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

First Name: John

Middle Name:

Last Name: Smith

Title: Financial Specialist

Phone: (505) 555-5555

Email: PEDDemoNotify@podassoc.com

User that report to this user:

Create User Patricia Hawkins Create Date 2/9/2012

Modify User Patricia Hawkins Modified Date 2/9/2012

☐ Duplicate Person Overridden

Save Cancel

Edit Login: John Smith

Step 6: To change the Message and Email Notification status Click on **Edit Login**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 7: Edit all applicable fields. Then Click on **Save Login**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins
PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

User Login johnsmith

Activate Date 2/9/2012

De-Activate Date <M/d/yyyy>

☒ Receive Messages ☒ Batch Email

☒ Receive Email ☐ Hide in Reports

Signature Date <M/d/yyyy>

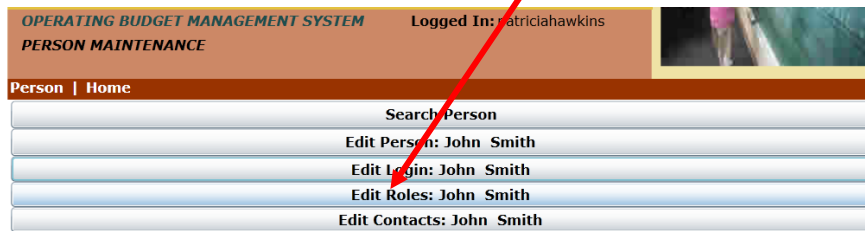
Create User Patricia Hawkins Create Date 2/9/2012

Modify User Patricia Hawkins Modify Date 2/9/2012

Reset Password

Save Login Cancel

Step 8: To Edit a User's *Role* or *Fund Assignment* Click on **Edit Roles**. (Note: Fund Assignments only apply to the DPM and DFM Roles).



OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

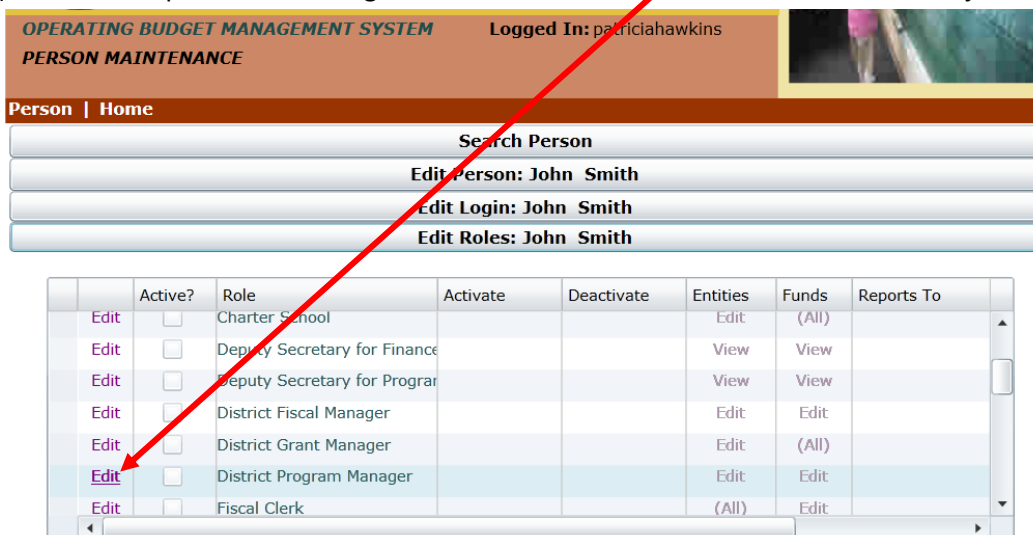
Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Generally Roles will not change. However, in some cases the Business Manager may be assigned additional roles such as the DPM and DFM.

Step 9: To assign an additional role for an existing User, Click the **Edit** link next to the role you are adding. (For this example we are adding the DPM as an additional role to the BM role we just created.)



OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

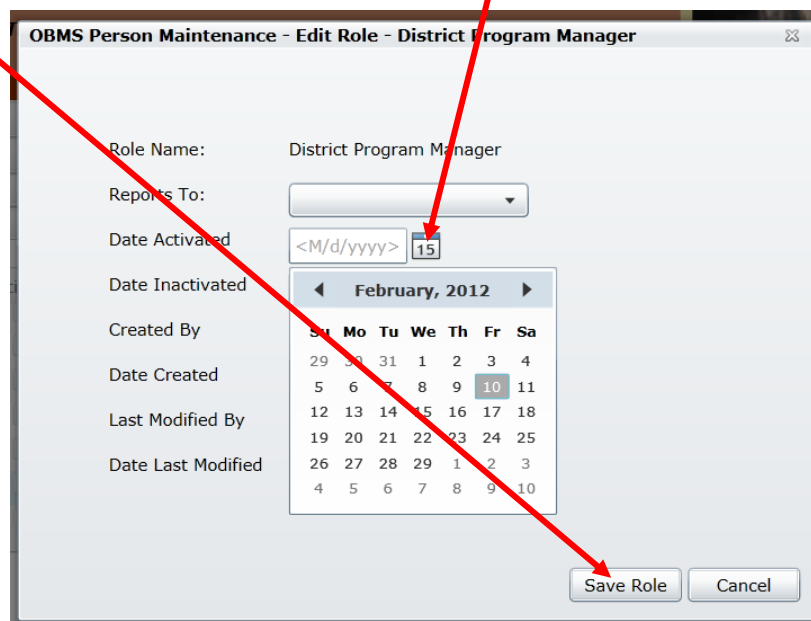
Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Charter School			Edit	(All)	
Edit	<input type="checkbox"/>	Deputy Secretary for Finance			View	View	
Edit	<input type="checkbox"/>	Deputy Secretary for Program			View	View	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input type="checkbox"/>	District Program Manager			Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	

Step 10: Enter the *Date Activated* by Clicking on the **Calendar icon** and Selecting the *current date*. Then Click on **Save Role**.



OBMS Person Maintenance - Edit Role - District Program Manager

Role Name: District Program Manager

Reports To:

Date Activated: <M/d/yyyy> 15

Date Inactivated:

Created By:

Date Created:

Last Modified By:

Date Last Modified:

February, 2012

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	1	2	3
4	5	6	7	8	9	10

Save Role Cancel

Step 11: Click on the **Edit** link under *Entities*.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Deputy Secretary for Program			view	view	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input checked="" type="checkbox"/>	District Program Manager	2/10/2012		Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	
Edit	<input type="checkbox"/>	Fiscal Director			(All)	(All)	
Edit	<input type="checkbox"/>	Fund Analyst			(All)	Edit	

Step 12: Select the **Checkbox** next to the Entity you are assigning. Click on **Save Assignments**.

OBMS Person Maintenance - Edit Entities - District Program Manager

Show All

Entity	Assigned?
Benning Cesar Chavez Charter High School	<input type="checkbox"/>
Digital Arts and Technology Academy	<input type="checkbox"/>
El Camino Real Academy	<input type="checkbox"/>
Espanola Military Academy (Inactive)	<input type="checkbox"/>
Gordon Bernell Charter School	<input type="checkbox"/>
Horizon Academy Technology and Arts High School (Inactive)	<input type="checkbox"/>
Jefferson Montessori Academy	<input checked="" type="checkbox"/>
La Academia de Esperanza	<input type="checkbox"/>
La Academia Dolores Huerta	<input type="checkbox"/>
Lacy Simms Middle School (Inactive)	<input type="checkbox"/>
Las Montañas Charter School	<input type="checkbox"/>
Life Skills Center of Albuquerque (Inactive)	<input type="checkbox"/>

Clear All Save Assignments Cancel

Step 13: Click the **Edit** link under *Funds*. (**Note:** The only roles that allow you to edit *Funds* are the DPM and DFM roles.)

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Deputy Secretary for Program			view	view	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input checked="" type="checkbox"/>	District Program Manager	2/10/2012		Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	
Edit	<input type="checkbox"/>	Fiscal Director			(All)	(All)	
Edit	<input type="checkbox"/>	Fund Analyst			(All)	Edit	

Step 14: Select the **Checkbox** next to the *Fund(s)* you are assigning to the DPM role. Then Click **Save Assignments**.

OBMS Person Maintenance - Edit Funds - District Program Manager

UniformFY12 Show All

Fund	Assigned?
13000 - Pupil Transportation	<input type="checkbox"/>
14000 - Total Instructional Materials Sub-Fund	<input type="checkbox"/>
24000 - Federal Flow-through Grants	<input type="checkbox"/>
24101 - Title I - IASA	<input checked="" type="checkbox"/>
24103 - Migrant Children Education	<input type="checkbox"/>
24104 - CNM Foundation	<input type="checkbox"/>
24105 - Title I Migrant Consortium	<input type="checkbox"/>
24106 - Entitlement IDEA-B	<input type="checkbox"/>
24107 - Discretionary IDEA-B	<input type="checkbox"/>
24108 - Competitive IDEA-B	<input type="checkbox"/>
24109 - Preschool IDEA-B	<input type="checkbox"/>
24110 - Federal Admin (CILT)	<input type="checkbox"/>

Clear All Save Assignments Cancel

Step 15: To Add or Delete BAR and RfR access, Click on **Edit Contacts**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 16: To Add access to a BAR or RfR for an existing User **Select the Entity**, Enter the **Activation** date by Clicking on the **Calendar icon** and Selecting the **current date**. Then Click on **Save**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Contact Types

Type	Activation	DeActivation
BAR	<M/d/yyyy> 15	<M/d/yyyy> 15
RfR	<M/d/yyyy> 15	<M/d/yyyy> 15

Select Entity

- J. Paul Taylor
- Jal
- Jefferson Montessori Academy
- Jemez Mountain
- Jemez Valley
- Juvenile Justice Services - CYFD

Active Contact Assignments

- Carlsbad - BAR
- Carlsbad - RfR

Save Cancel

Once you have successfully saved the changes the entity assigned will appear in the *Active Contact Assignments*' box (shown below).

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Entity

- J. Paul Taylor
- Jal
- Jefferson Montessori Academy
- Jemez Mountain
- Jemez Valley
- Juvenile Justice Services - CYFD

Active Contact Assignments

- Carlsbad - BAR
- Carlsbad - RFR
- Jefferson Montessori Academy - BAR
- Jefferson Montessori Academy - RFR

Select Contact Types

Type	Activation	DeActivation
BAR	2/10/2012	<M/d/yyyy>
RFR	2/10/2012	<M/d/yyyy>

Save Cancel

How to De-activate Current Users:

Step 1: After you Click on the *Maintenance* from the OBMS Home Page enter the **Last Name** of the User you are going to De-activate. Click on **Search**. (Reminder: We recommend checking the **Sounds Like** box before you Click on **Search**.)

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Last Name

First Name

Middle Name

Login ID

☐ User Active ☐ Not User ☐ Contact Active ☐ Not Contact

☒ Sounds Like (First Name or Last Name Search Only)

Search

Step 2: Click on the **User's Name** you want to De-activate. Then Click on **Edit Person**.

OPERATING BUDGET MANAGEMENT SYSTEM
PERSON MAINTENANCE

Logged In: patriciahawkins

Person | Home

Search Person

Last Name

First Name

Middle Name

Login ID

☐ User Active ☐ Not User ☐ Contact Active ☐ Not Contact

☒ Sounds Like (First Name or Last Name Search Only)

Search

First Name	Middle Name	Last Name	Title	Login ID	Phone	Email Address
Beth		Smith	Ed Administrator - Prof Dev	bethsmith	505-827-3578	beth.smith@
Donna		Smith	Financial Specialist/General Ledger	donnasmith	505-827-8253	dysmith@llsc
John		Smith	Financial Specialist	johnsmith	(505) 827-5555	PEDDemoNo
Leslie		Smith	Assistant Superintendent of Finance	lesliesmith	505-827-2537	lsmith@risd.

Edit Person Add Person

Step 3: Always start with *Edit Contacts* when *De-activating* a User. Click on **Edit Contacts**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Step 4: To *De-activate* the BAR or RfR Contact you must first Click on the **Entity**. Then Enter the *DeActivation* date under *Select Contact Types* by clicking on the **Calendar icon** and Selecting the *current date*. Click on **Save**. (Note: This step must be repeated for each *entity* and type (BAR or RfR) assigned to this User.)

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Contact Types

Select Entity

Capitan

Career Academic Technical Academy

Carinos De Los Ninos

Carlsbad

Carrizozo

Central

Active Contact Assignments

Carlsbad - BAR

Carlsbad - RfR

Jefferson Montessori Academy - BAR

Jefferson Montessori Academy - RfR

Type Activation DeActivation

BAR 2/9/2012 15 <M/d/yyyy> 15

RfR 2/9/2012 15

February, 2012

Su Mo Tu We Th Fr Sa

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 1 2 3

4 5 6 7 8 9 10

Save Cancel

Once you have successfully *De-activated* the *Active Contact Assignments* you will no longer see *Assignments* for this user (shown below).

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

Edit Contacts: John Smith

Select Contact Types

Select Entity

J. Paul Taylor

Jal

Jefferson Montessori Academy

Jemez Mountain

Jemez Valley

Juvenile Justice Services - CMB

Active Contact Assignments

Type Activation DeActivation

BAR 2/10/2012 15 2/13/2012 15

RfR 2/10/2012 15 2/13/2012 15

Save Cancel

Step 5: Click on **Edit Roles**. Then Click on the **Edit** link under **Entities**.

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Deputy Secretary for Finance			View	View	
Edit	<input type="checkbox"/>	Deputy Secretary for Program			View	View	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input checked="" type="checkbox"/>	District Program Manager	2/10/2012		Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	
Edit	<input type="checkbox"/>	Fiscal Director			(All)	(All)	

Step 6: De-select the **checkbox(es)** next to the **Entity** assigned to this user. Click on **Save Assignments**.

OBMS Person Maintenance - Edit Entities - District Program Manager

Show Checked

Entity	Assigned?
Carlsbad	<input checked="" type="checkbox"/>
Jefferson Montessori Academy	<input checked="" type="checkbox"/>

Clear All Save Assignments Cancel

Step 7: Click on the **Edit** link under **Funds**. (**Note:** The only roles that allow you to edit **Funds** are the DPM and DFM roles.)

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Deputy Secretary for Program			view	view	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input checked="" type="checkbox"/>	District Program Manager	2/10/2012		Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	
Edit	<input type="checkbox"/>	Fiscal Director			(All)	(All)	
Edit	<input type="checkbox"/>	Fund Analyst			(All)	Edit	

Step 8: De-select the **checkbox** next to the Fund(s) Assigned to this user. Click on **Save Assignments**.

OBMS Person Maintenance - Edit Funds - District Program Manager

UniformFY12 Show Checked

Fund	Assigned?
24101 - Title I - IASA	<input checked="" type="checkbox"/>

Clear All Save Assignments Cancel

Step 9: Click on the **Edit** link next to the role you are *De-activating*. (Note: All Entities and Funds must be *De-activated* BEFORE you Click on the *Edit* link to *De-activate* each role.)

OPERATING BUDGET MANAGEMENT SYSTEM Logged In: patriciahawkins

PERSON MAINTENANCE

Person | Home

Search Person

Edit Person: John Smith

Edit Login: John Smith

Edit Roles: John Smith

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Charter School			Edit	(All)	
Edit	<input type="checkbox"/>	Deputy Secretary for Finance			View	View	
Edit	<input type="checkbox"/>	Deputy Secretary for Program			View	View	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input checked="" type="checkbox"/>	District Program Manager	2/10/2012		Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	

Step 10: Enter the *Date Inactivated* by Clicking on the **Calendar icon** and Selecting the *current date*. Click on **Save Role**.

OBMS Person Maintenance - Edit Role - District Program Manager

Role Name: District Program Manager

Reports To:

Date Activated: 2/10/2012

Date Inactivated: <M/d/yyyy>

Created By:

Date Created:

Last Modified By:

Date Last Modified:

February, 2012

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	1	2	3
4	5	6	7	8	9	10

Save Role Cancel

After successfully *De-activating* ALL Roles, Entities and Funds you will see a date under *Deactivate* as shown below.

	Active?	Role	Activate	Deactivate	Entities	Funds	Reports To
Edit	<input type="checkbox"/>	Deputy Secretary for program			View	View	
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit	
Edit	<input type="checkbox"/>	District Grant Manager			Edit	(All)	
Edit	<input type="checkbox"/>	District Program Manager	2/10/2012	2/13/2012	Edit	Edit	
Edit	<input type="checkbox"/>	Fiscal Clerk			(All)	Edit	
Edit	<input type="checkbox"/>	Fiscal Director			(All)	(All)	
Edit	<input type="checkbox"/>	Fund Analyst			(All)	Edit	

Step 11: Click on **Edit Login**. Enter a *De-Activate* date by Clicking on the **Calendar icon** and Selecting the *current date*. Click on **Save Login**.

User Login: johnsmith

Activate Date: 2/9/2012

De-Activate Date: <M/d/yyyy> 2/9/2012

☒ Receive Messages

☒ Receive Email

Signature Date: <M/d/yyyy> 2/9/2012

Create User: 2/9/2012

Modify User: 2/9/2012

[Reset Password](#)

[Save Login](#) [Cancel](#)

Step 12: Once you Click on **Save Login** the message below will appear. Click **Ok** to close the message. You will need to go back to *Edit Roles* and ensure ALL Roles, Entities and Funds have been *De-activated*. Then you must refresh the screen by clicking on **Home**. After you refresh your screen, Click on *Maintenance* and *Search* for the User you are *De-activating*. Then you must Repeat Step 11 to successfully *De-activate* the User.

User Login: johnsmith

Activate Date: 2/9/2012

De-Activate Date: 2/13/2012

☒ Receive Messages ☒ Batch Email

☒ Receive Email ☐ Hide in Reports

Signature Date: <M/d/yyyy> 2/9/2012

Create User: Patricia Hawkins 2/9/2012

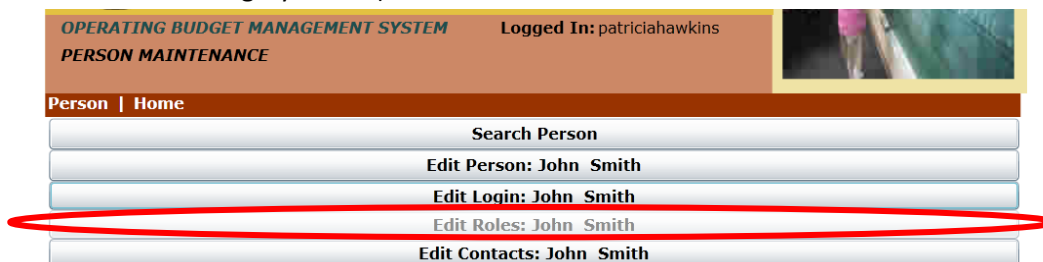
Modify User: Patricia Hawkins 2/9/2012

[Reset Password](#)

[Save Login](#) [Cancel](#)

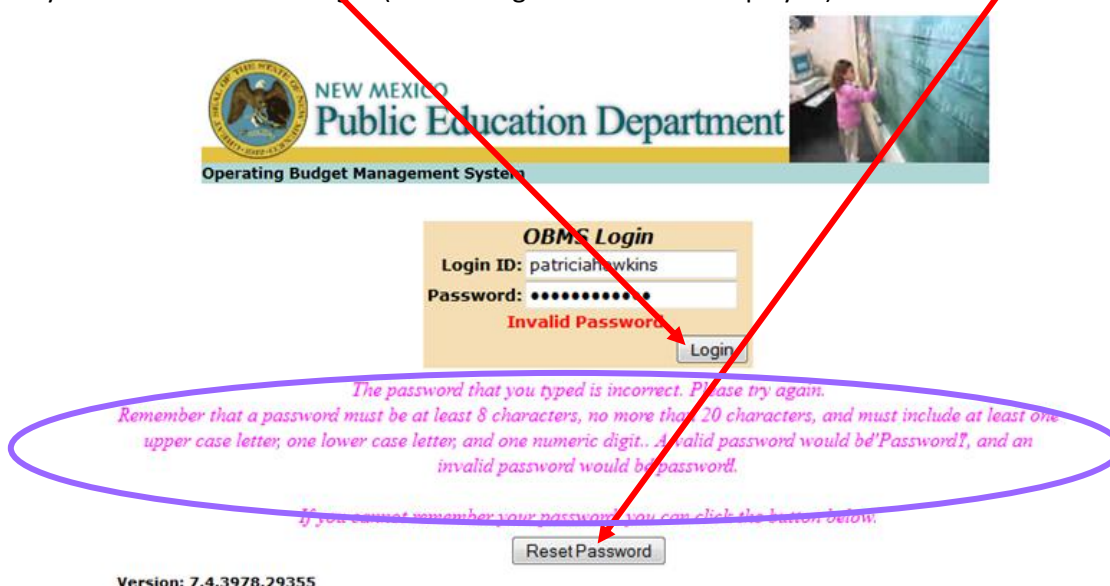
User Deactivation
User has active roles, cannot deactivate.
[Ok](#)

The following screen shot shows the User has been successfully *De-Activated*. (**Note:** The *Edit Roles* toolbar for this User is now grayed out.)

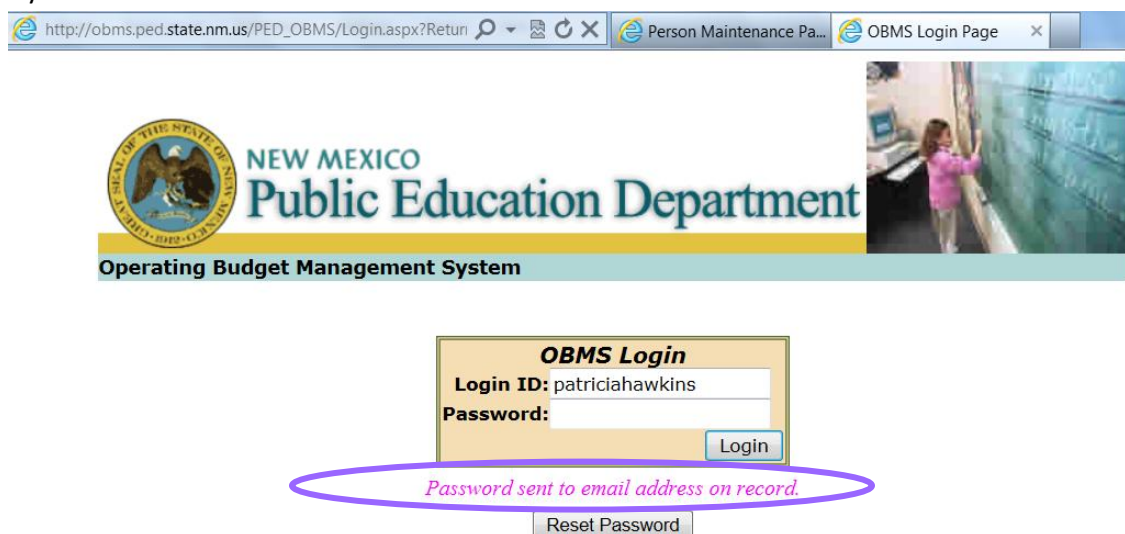


V. Resetting Passwords

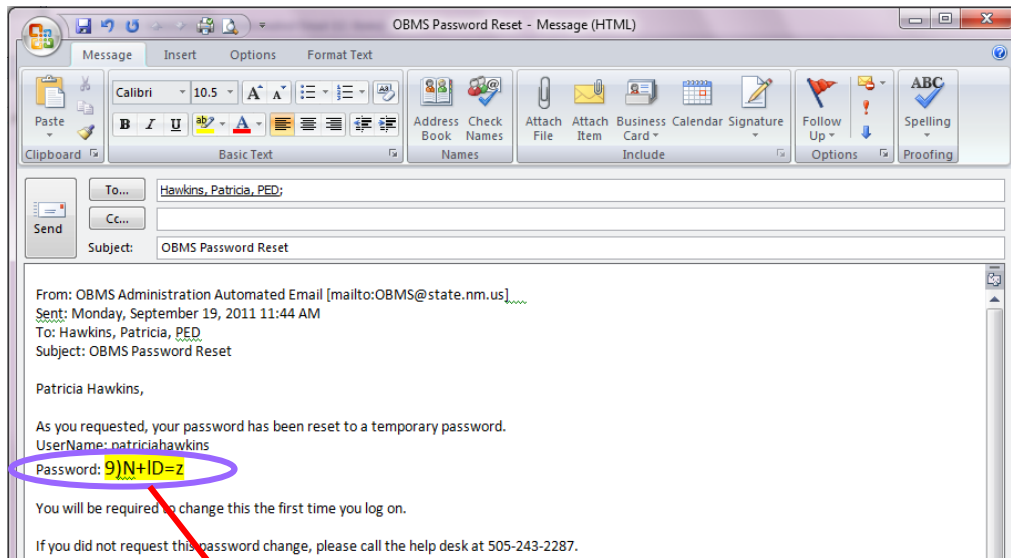
Step 1: In the event you forget your Password you can reset your own Password. Enter your *Login ID* and any *Password* then Click **Login** (the message below will be displayed). Click on **Reset Password**.



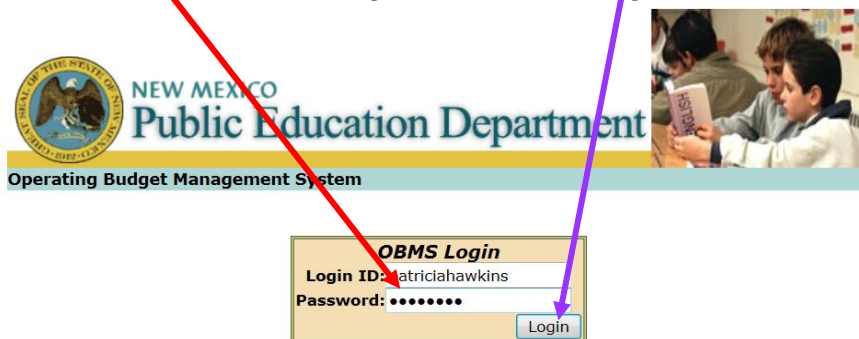
Step 2: OBMS will display a message saying **Password sent to email address on record** (shown below). Check your email.



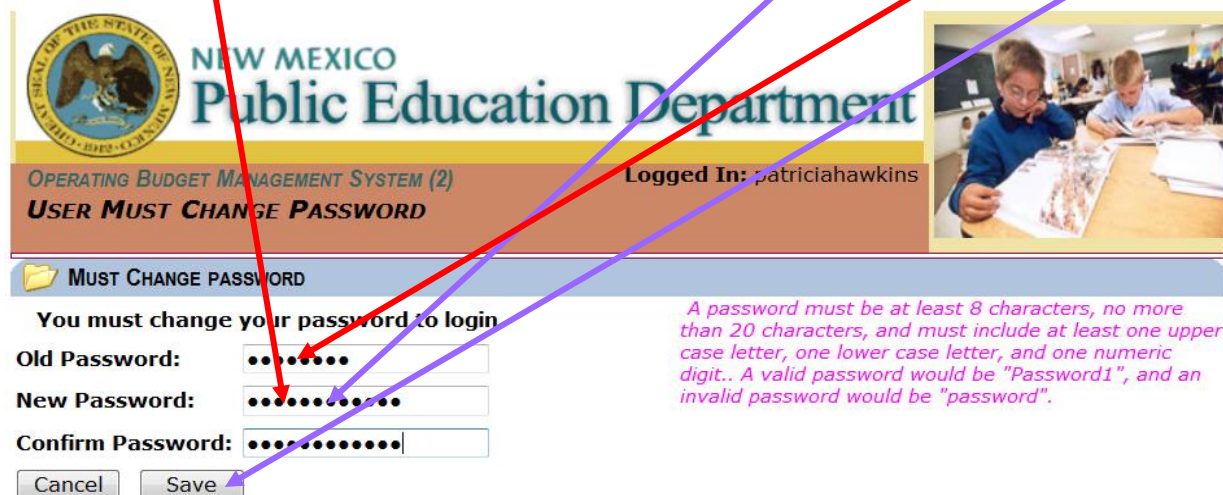
Step 3: This is an example of the OBMS email notification that includes your *temporary password*.



Step 4: We recommend that you *Copy and Paste* your temporary password directly from the email notification to the *Password* field on the OBMS Login screen. Click on **Login**.



Step 5: Upon Login you will be prompted to *change your password*. We recommend you *Copy and Paste* your temporary password from the OBMS email notification in the box next to **Old Password**. Type your personalized **New Password**. Re-type your **New Password** to **Confirm Password**. Click on **Save**.



Reminder: The next time you log into OBMS use your assigned OBMS User Login ID and your *New Password*.