Assigning OBMS Access for the New Mexico Unified Application

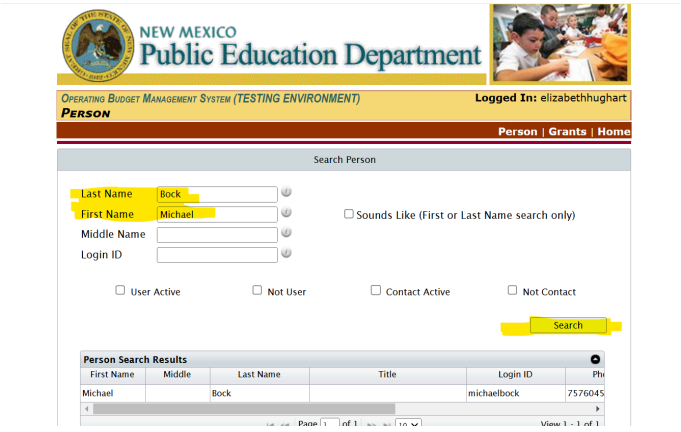
Planning Lead

As the UA Planning Lead, you have been given access to the UA in OBMS. Here are a few important points to remember about your role:

1. The Planning Lead is the only individual who can submit the Unified Application on behalf of their LEA.
2. The Planning Lead will grant UA access to the appropriate LEA personnel involved in completing the UA. These personnel will have a Grant Editors role in OBMS.
    a. The Planning Lead will have discretion to assign personnel as Grant Editors in the UA in OBMS.
    b. The Planning Lead and the Grant Editors will work together to develop, revise, and update the application so that the Planning Lead can eventually submit it. Grant Editors can edit the modules/sections of the application, but cannot submit the application.

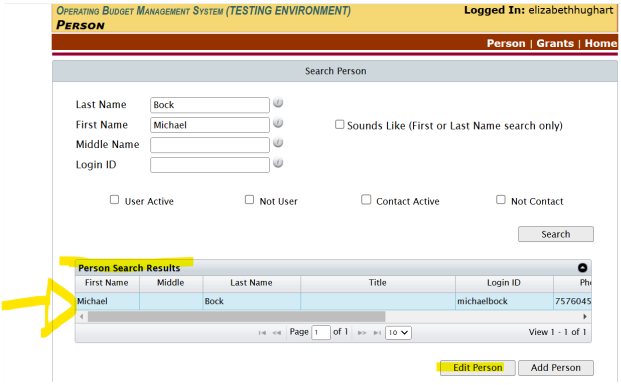
How to Assign Grant Editors

1. Open your web browser.
2. Log in to OBMS: [OBMS Login Page]
3. Go to the toolbar ribbon and click on “Maintenance”.
4. Once you are in “Maintenance”, you can either edit a user’s role or you can add a person to the system.
    a. To edit the role of a user already in the system, type in either the person’s last or first name in the information fields and click “Search”. You may also use * to broaden your search.

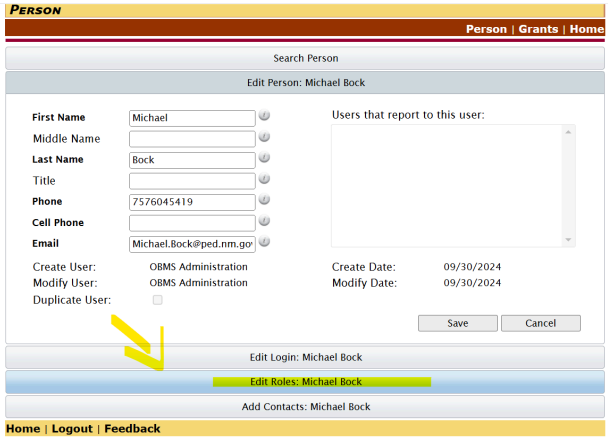


    b. You will see the person’s name appear at the bottom under “Person Search Results”.

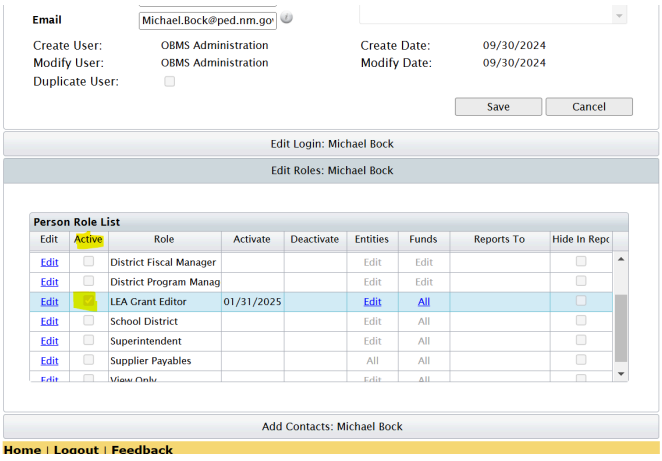
c. Click on their name to highlight it; then click “Edit Person”.



5. Next, click “Edit Roles”.

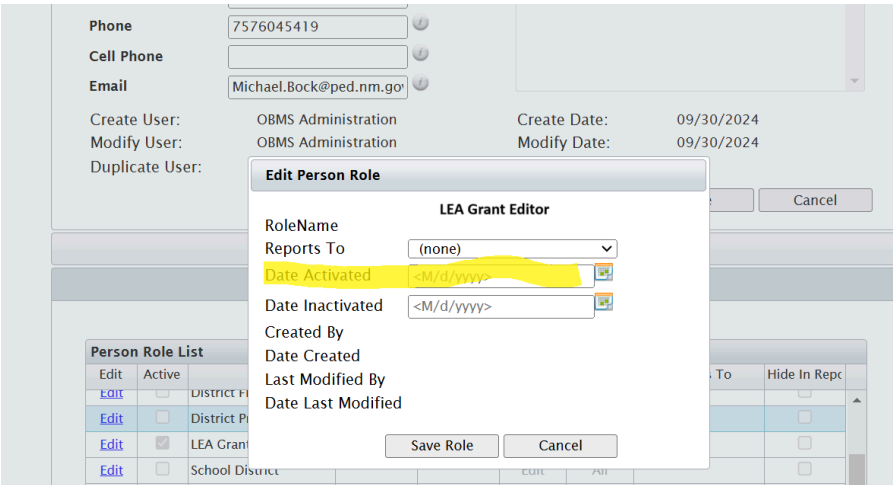


6. Once you click “Edit Roles”, you will see a list of available roles. You will assign the person as “LEA Grant Editor”.

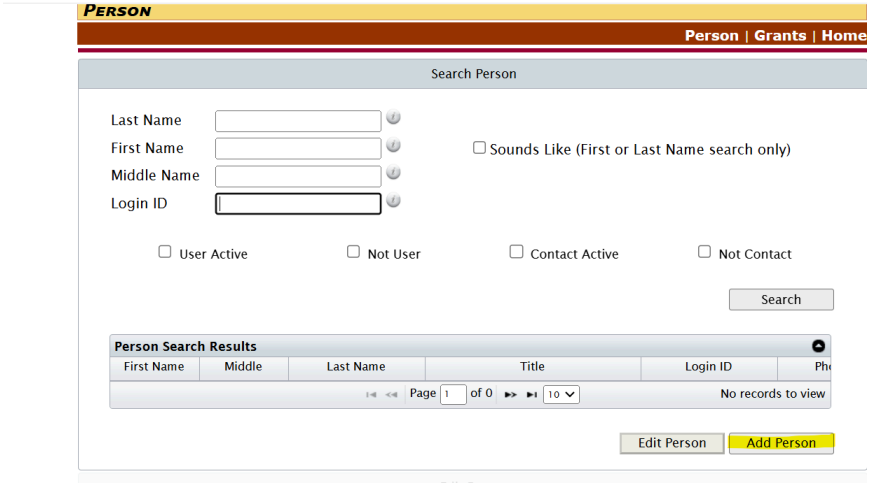


7. Click “Edit” to the left of the role and then click on the mini-calendar in the “Date Activated Field” to add the date of activation, which would be the day you assign the role to the individual in OBMS.

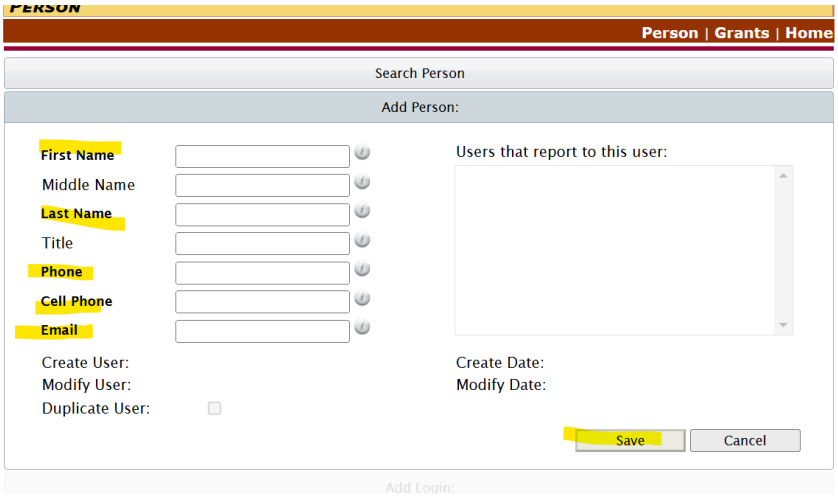
8. Next, click “Edit” under the “Entities” column to add your LEA. This step assigns the Grant Editor to your LEA’s application. If this step is not completed, the Grant Editor will not be able to access the application.



9. Adding an individual to OBMS as a grant editor:
    a. You will need to add someone in OBMS as a Grant Editor if you search for their name in “Maintenance” and cannot find them or you already know that they are not in the system.
    b. Go to “Maintenance” and then click “Add Person”

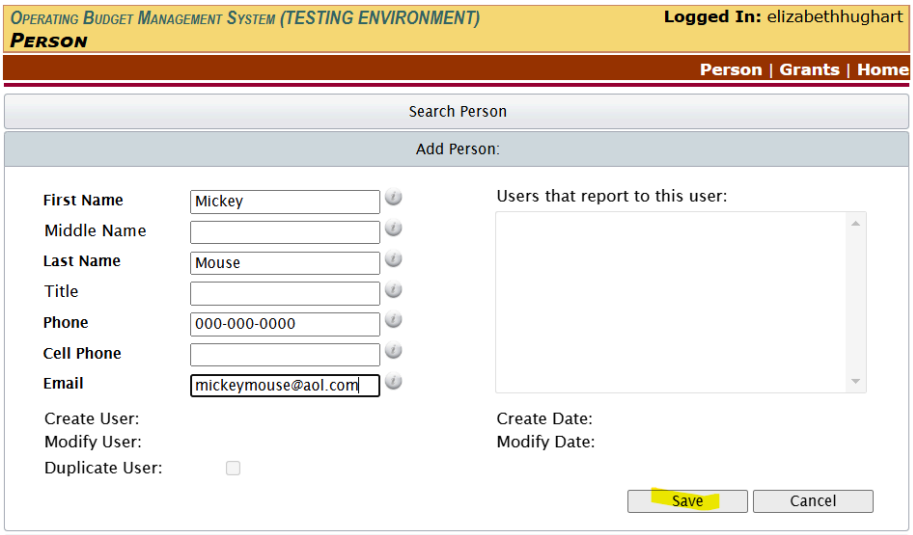


c. Then you will see the following screen and complete the required fields to add the individual:

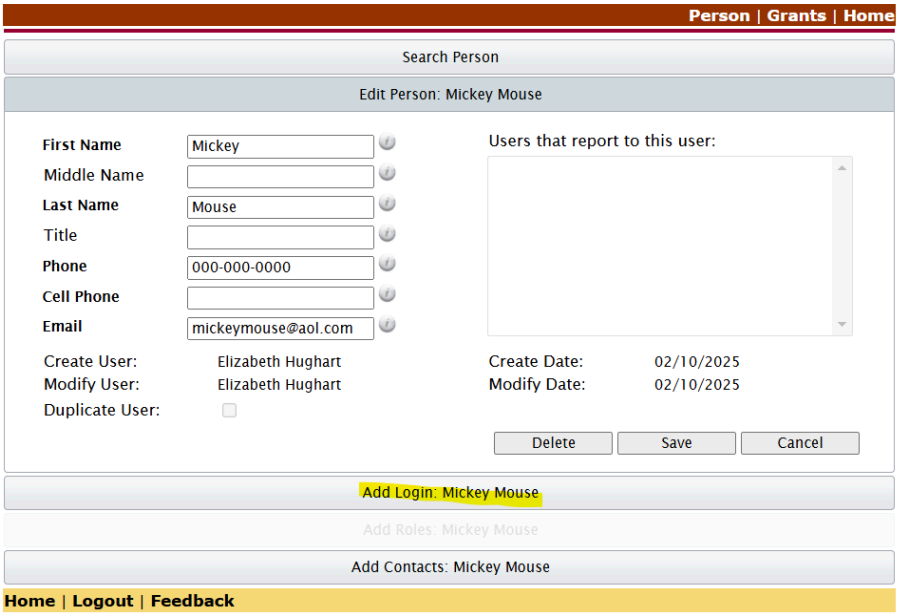


*Note: Adding a person's Cell Phone number is not required.

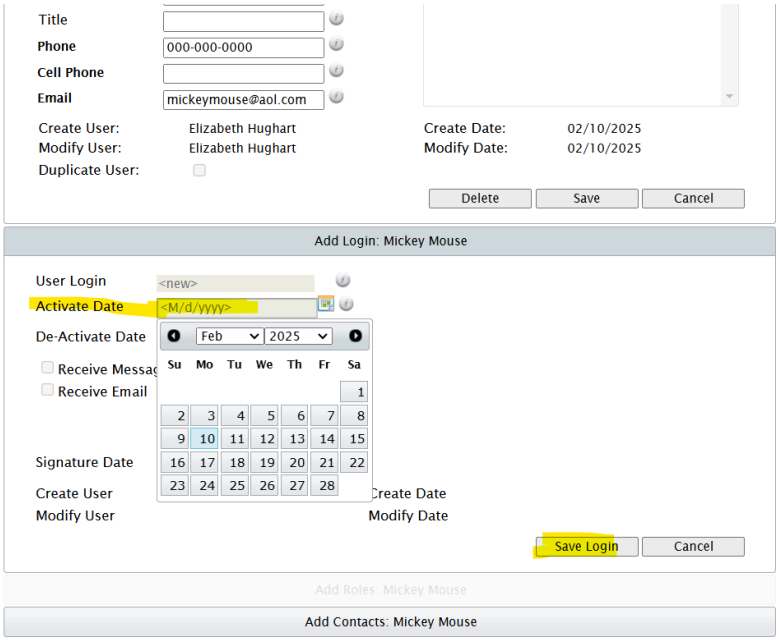
d. Hit the "Save" button.



e. Next, click “Add Login: [new user’s name]”.



f. Fill in “Activate Date” and then click “Save Login”.



g. Now complete steps 4-7 to assign the individual the LEA Grant Editor role.