User Manual "Maintenance" / "Person" for Business Managers

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2. Introduction

OBMS contains a user role, "Business Manager" (BM). This role is required to perform all tasks described in this manual.

The BM is responsible for configuring all users and contacts for the assigned budget entity (District, Local, or State Charter).

3. OBMS User Role Definitions

These are the definitions of the roles in OBMS and the access and limitations they provide for Reports, Actuals, Budgets, Budget Adjustment Requests (BARs), and Requests for Reimbursements (RfRs) as user maintenance.

3.1. 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.**

3.2. 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 / Representative.

3.3. 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.

3.4. 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.

3.5. 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.

3.6. 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.

3.7. 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.

4. Create a New User

Log in as BM to OBMS. Click on **Maintenance.**
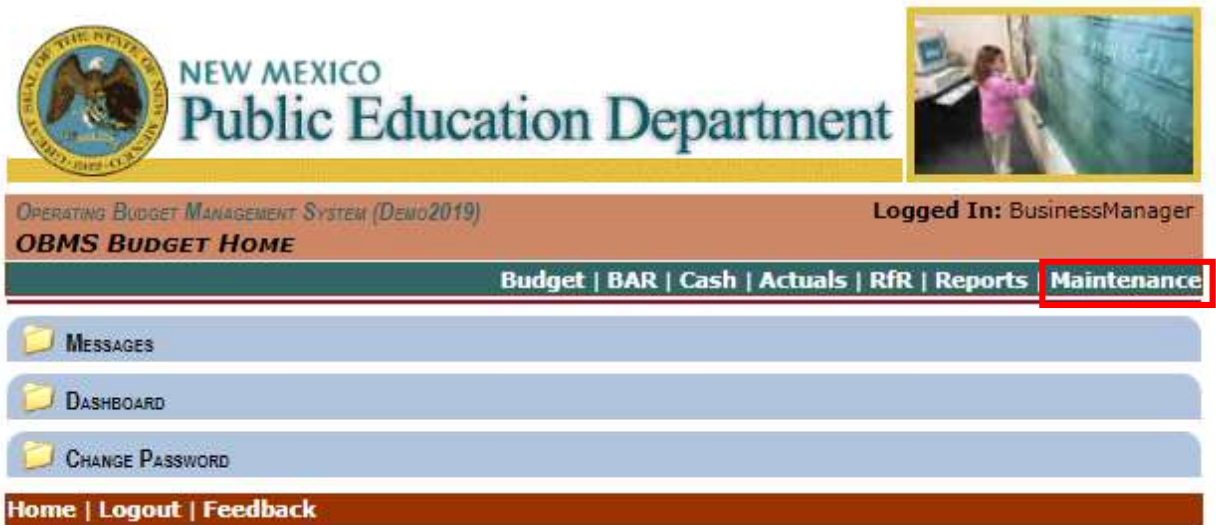
To avoid duplication of users, verify if the user to be entered already exists. Enter the "Last Name" and check the "Sounds Like" box, and click "Search".

Now, OBMS searches for the last name and generates a list of all Users with the same last name. Either update a current user or create a new User by clicking "Add Person". (To update a current user, click on the user and click on "Edit Person". In case you see a duplicate, verify which user shall be kept and deactivate the other one. See more below.)

To add a new user or contact, enter the person's data and click "Save"

Now click on "Add Login".

Now click on "Save Login".

Now click on "Edit Roles"
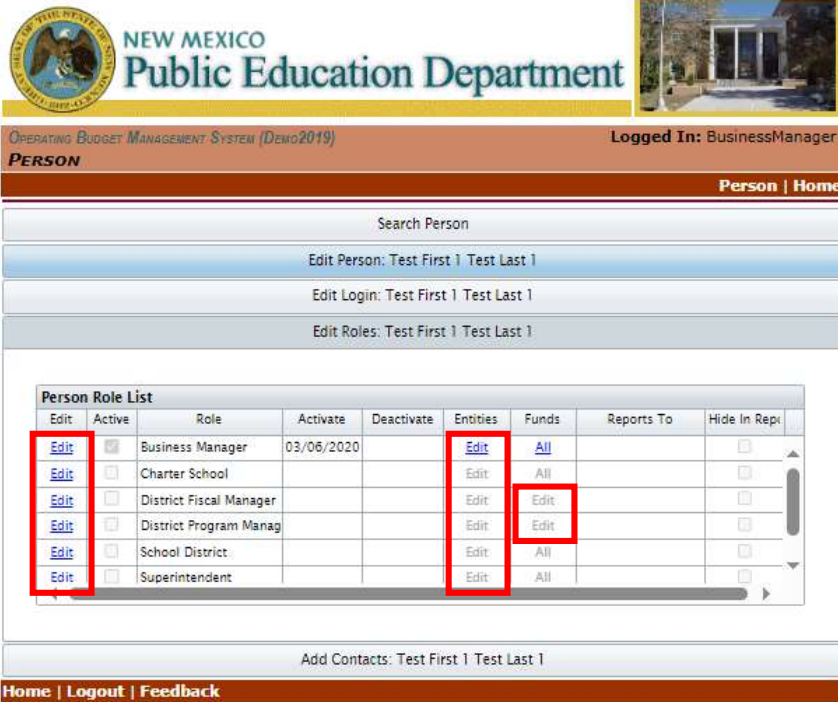
To assign a role to the user, use the appropriate "Edit" and provide the "Activate" Date and click "Save Role". Click on the "Edit" Entities to assign the correct budget entity to this user and click on "Save Assignments". In case of the User roles "District Fiscal Manager" and "District Program Manager" not only the entity needs to be assigned but also the funds. In this case, pay careful attention to which uniform chart of account the user shall have access. If the user shall have access for multiple fiscal years, each fiscal year fund combination must be configured. And always click on "Save Assignments".

User role Edit	Entity Edit	Fund Edit
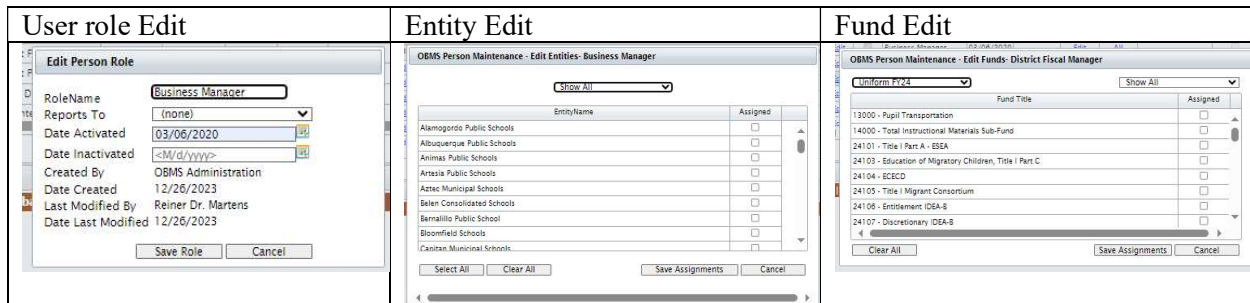
Special configuration for District Fiscal Manager and District Program Manager
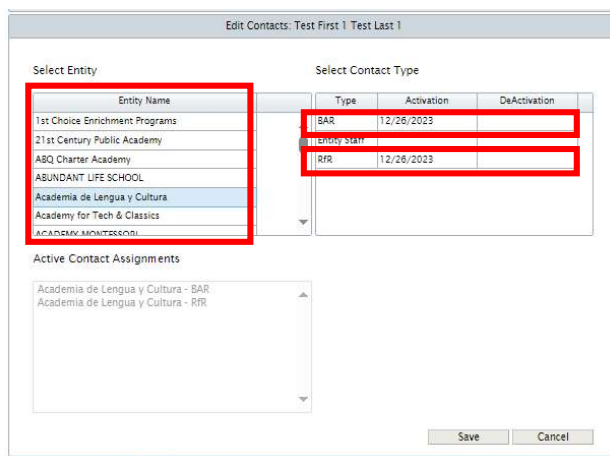
For both roles it must be defined if they can act on BARs and RfRs.

Select an Entity.

Select a date for BAR and/or RfR activation.

For deactivation, enter a data.

Click "Save" to update OBMS.

5. Edit an existing user

Search for an existing user by e.g. entering the last name and check "Sounds Like" and click on "Search".

Click "Edit Person" and update the data as learned in "Create a New User".

6. Adding and Removing a Contact in OBMS

The following requires an OBMS user role, "Business Manager".

A user, who does not need a Login ID or Password for OBMS access, may be created and configured as a Contact for an entity. This bypasses the need to configure roles or funds for a user. The main reason for this role is to enable Districts to provide all (PED) required contacts, like Title I director, Special Ed Director, or Federal Program Director, etc..
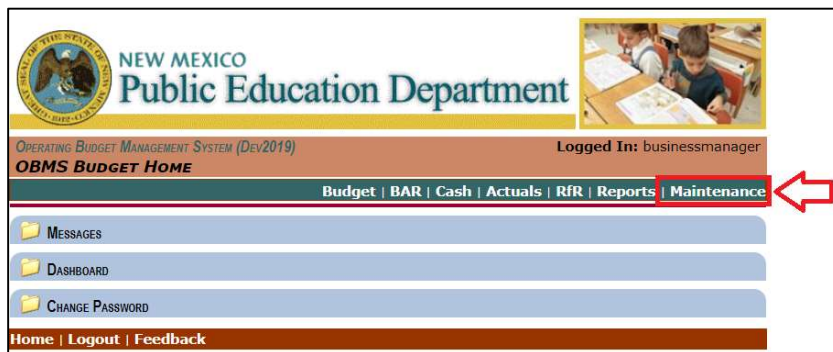
A user may be created and configured as a Contact in for an entity who does not need a Login ID or Password for OBMS access. This bypasses the need to configure roles or funds for a user.
From the home page, click Maintenance, then Person, on the top right corner.

Click Add Person

Enter the 4 mandatory fields: First Name, Last Name, Phone, and Email, then click Save.

Enter a Title which explains to PED the function of this contact, e.g. Federal Program Director, Special Ed Director, Title I director, Program Manager Family Income Index, State Program Director, School Board President, NOVA Coordinator, etc..

Click "Save"

Click on "Add Contacts" at the bottom of the screen to expand it.

Select the entity you wish to assign, then enter an activation date for Entity Staff, then click save. *Note: Business Managers can only create a contact for entities the BM has assigned to their role.* Once saved, the Entity and Contact Type will display under "Entity Staff", Activation.

To remove someone as a contact, search for the person like you learned before, select the person, and click on "Add Contract." Enter a date in the DeActivation box and save.

The Contact is removed from the entity.

7. Personnel Reports

OBMS has several "Personnel Reports" allowing users to verify personnel OBMS data.
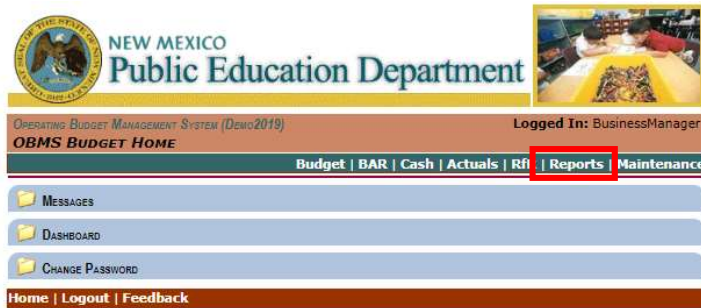
Click on Reports
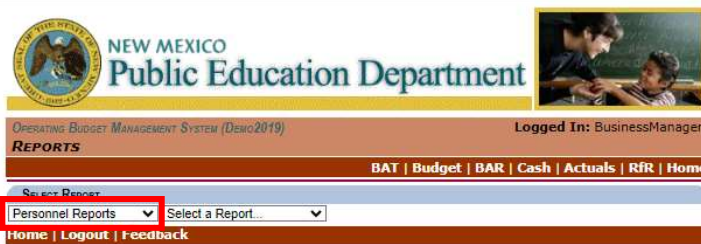
Within the Personnel Reports several reports exist.
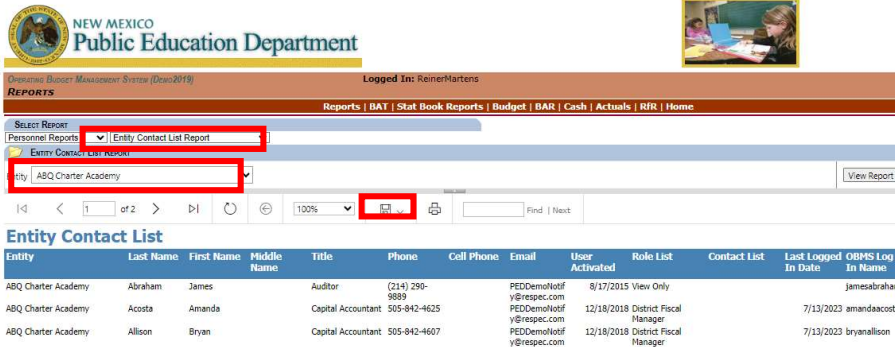
7.1. User Role by Entity Report
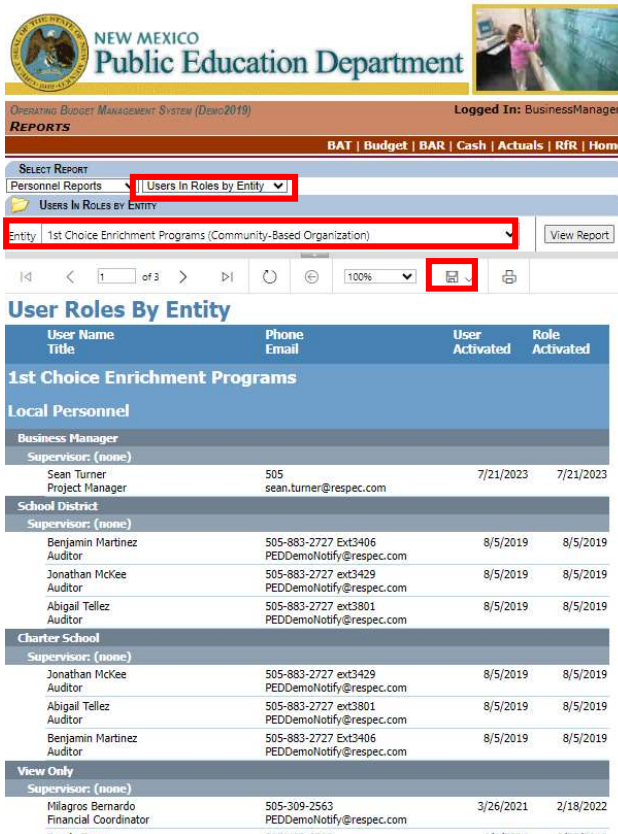
Select the report.

Choose the entity.

Download the data to EXCEL or PDF to see all data immediately.

This report provides all users configured for the entity. It is recommended that you verify this report at least once a year to ensure that the users of your entity are configured properly.

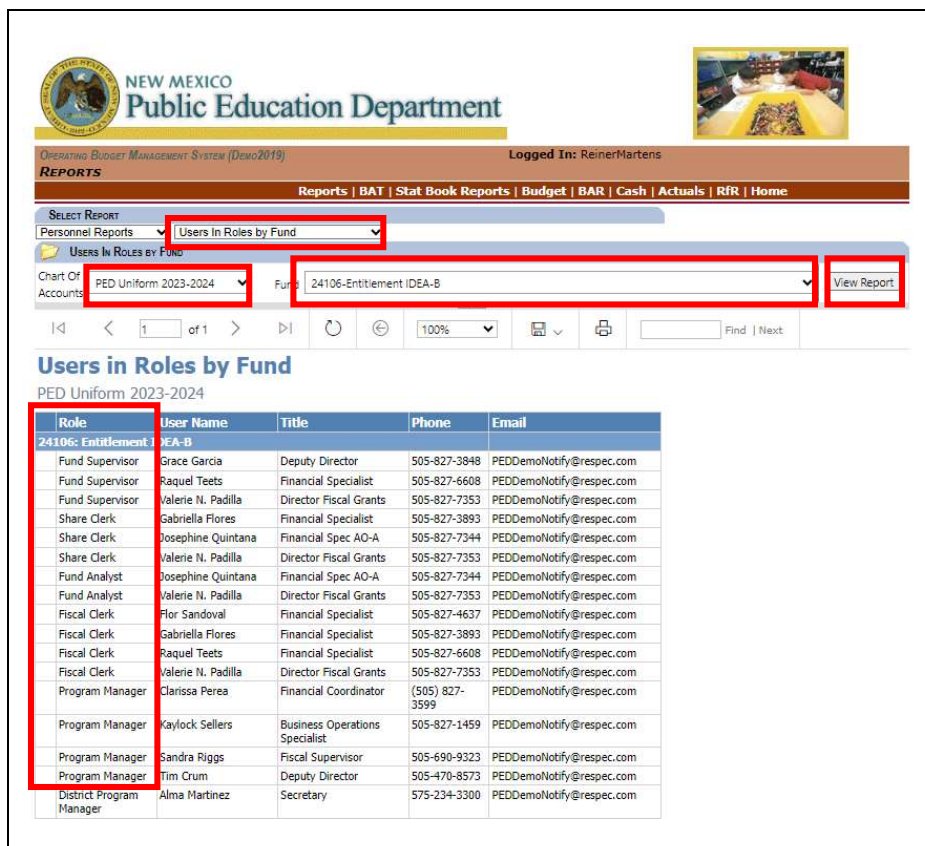## 7.2. Entity Contact List Report

Select the report.

Choose the entity.

Download the data to EXCEL or PDF to see all data immediately.

The report shows all of the entity-configured users and contacts.

7.3. Fund Contact List Report

The fund contact list identifies the PED personnel able to help about specific fund questions.

Select within the Personnel Reports, "Users in Roles by Fund".

Pick the UCoA FY.

Pick the Fund.

Click on "View Report".

Look for the PED employee you want to contact. Let it be an RfR questions (Fund Analyst, Share Clerk, Fund Supervisor, Fiscal Clerk) or a programmatic questions like allowable expenditures (Program Manager).