

# User Manual “Maintenance” / “Person” for Business Managers

Version 1.0 Created on 2/16/2024		Dr. Reiner Martens

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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

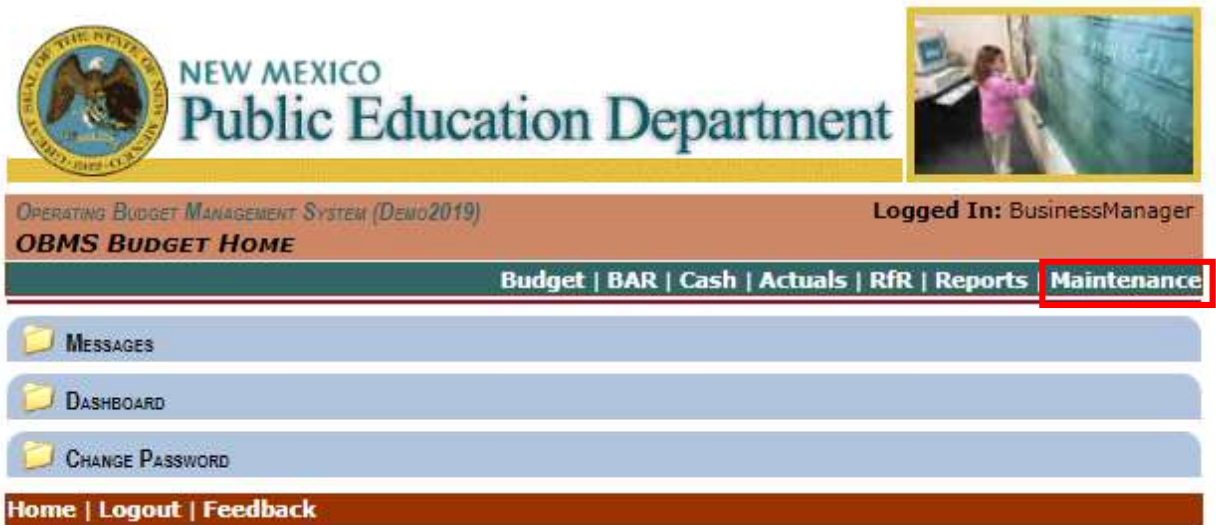
The District Fiscal Manager role only applies to **Districts with LOCAL Charter Schools**. This role gives access to Approve or Disapprove RfRs submitted by the District's Dependent Charter(s). This role cannot approve RfRs before the District Program Manager. Generally this role is assigned to the District's 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”.





**NEW MEXICO**  
**Public Education Department**

OPERATING BUDGET MANAGEMENT SYSTEM (Demo2019) Logged In: BusinessManager

**PERSON** Person | Home

---

Search Person

Last Name:    
 First Name:    
 Middle Name:    
 Login ID:

Sounds Like (First or Last Name search only)

User Active     Not User     Contact Active     Not Contact

Person Search Results					
First Name	Middle	Last Name	Title	Login ID	Ph
Rainer		Martens	Director	reinermartens	505-500
Rainer		Martens	CFO	(none)	5058273
Delton		Martin	Student Services Director	deltonmartin	5052853
Joey	F	Martin	Business Manager	(none)	505-998
Joey	F	Martin	Program Manager	joeyfmartin	505-827
Kitty		Martin	Federal Programs Director	kittymartin	575-653
Logan		Martin	Business Manager	loganmartin	505-982
Marvin	L	Martin	Superintendent	marvinimartin	575-653
nancy		martinealonzo	Asst. Secretary	nancymartinealonzo	505-827
Sally		Martinet	Accountant	sallymartinet	505-467

Page 1 of 10    View 1 - 10 of 100

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.)



**NEW MEXICO**  
**Public Education Department**

OPERATING BUDGET MANAGEMENT SYSTEM (Demo2019) Logged In: BusinessManager

**PERSON** Person | Home

---

Search Person

Add Person:

First Name:    
 Middle Name:    
 Last Name:    
 Title:    
 Phone:    
 Cell Phone:    
 Email:


Users that report to this user:

Create User:     Create Date:   
 Modify User:     Modify Date:   
 Duplicate User:

Add Login:  
Add Roles:  
Add Contacts:

**Home | Logout | Feedback**

To add a new user or contact, enter the person’s data and click “Save”



**NEW MEXICO**  
**Public Education Department**

OPERATING BUDGET MANAGEMENT SYSTEM (DEMO2019) Logged In: BusinessManager

**PERSON** Person | Home

---

Search Person

Edit Person: Test First 1 Test Last 1

<b>First Name</b>	<input type="text" value="Test First 1"/>	Users that report to this user:
Middle Name	<input type="text"/>	
<b>Last Name</b>	<input type="text" value="Test Last 1"/>	
<b>Title</b>	<input type="text" value="Test Title"/>	
<b>Phone</b>	<input type="text" value="5059998877"/>	
<b>Cell Phone</b>	<input type="text" value="5058889977"/>	
<b>Email</b>	<input type="text" value="fist.last@test.edu"/>	

Create User:	Reiner Dr. Martens	Create Date:	12/26/2023
Modify User:	Reiner Dr. Martens	Modify Date:	12/26/2023
Duplicate User:	<input type="checkbox"/>		


**Add Login: Test First 1 Test Last 1**

Add Roles: Test First 1 Test Last 1

Add Contacts: Test First 1 Test Last 1

Home | Logout | Feedback

Now click on “Add Login”.



**NEW MEXICO**  
**Public Education Department**

OPERATING BUDGET MANAGEMENT SYSTEM (DEMO2019) Logged In: BusinessManager

**PERSON** Person | Home

---

Search Person

Edit Person: Test First 1 Test Last 1

<b>First Name</b>	<input type="text" value="Test First 1"/>	Users that report to this user:
Middle Name	<input type="text"/>	
<b>Last Name</b>	<input type="text" value="Test Last 1"/>	
<b>Title</b>	<input type="text" value="Test Title"/>	
<b>Phone</b>	<input type="text" value="5059998877"/>	
<b>Cell Phone</b>	<input type="text" value="5058889977"/>	
<b>Email</b>	<input type="text" value="fist.last@test.edu"/>	

Create User:	Reiner Dr. Martens	Create Date:	12/26/2023
Modify User:	Reiner Dr. Martens	Modify Date:	12/26/2023
Duplicate User:	<input type="checkbox"/>		

Edit Login: Test First 1 Test Last 1

User Login	<input type="text" value="testfirst1testlast1"/>		
Activate Date	<input type="text" value="12/26/2023"/>	<input type="button" value="D"/>	
De-Activate Date	<input type="text" value="&lt;M/d/yyyy&gt;"/>	<input type="button" value="D"/>	
<input type="checkbox"/> Receive Messages	<input type="checkbox"/> Batch Email	<input type="button" value="Reset Password"/>	
<input type="checkbox"/> Receive Email	<input type="checkbox"/> Hide in Reports		
Signature Date	<input type="text" value="&lt;M/d/yyyy&gt;"/>	<input type="button" value="D"/>	
Create User:	Reiner Dr. Martens	Create Date:	12/26/2023
Modify User:	Reiner Dr. Martens	Modify Date:	12/26/2023

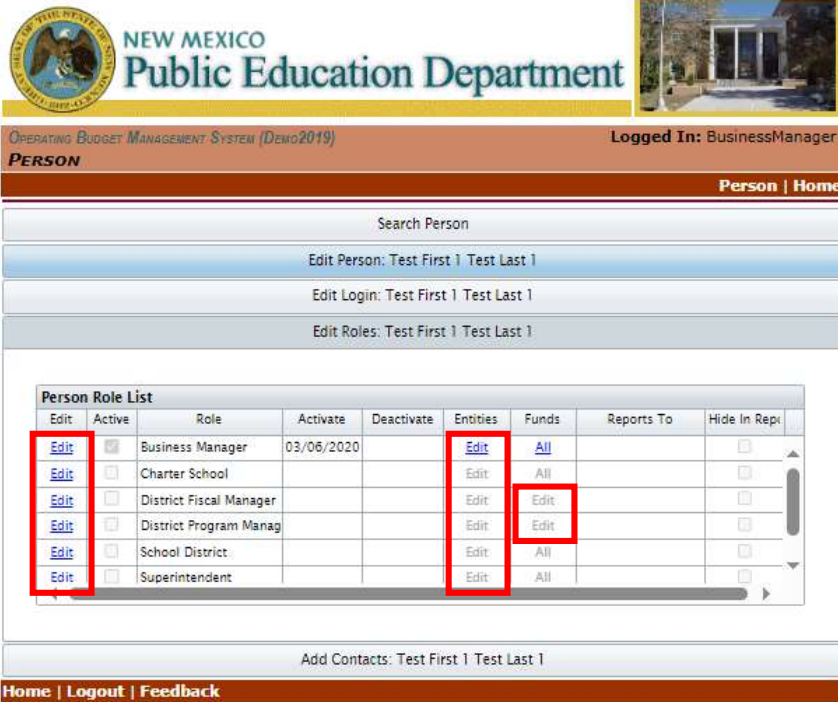
**Add Roles: Test First 1 Test Last 1**

Add Contacts: Test First 1 Test Last 1

Home | Logout | Feedback

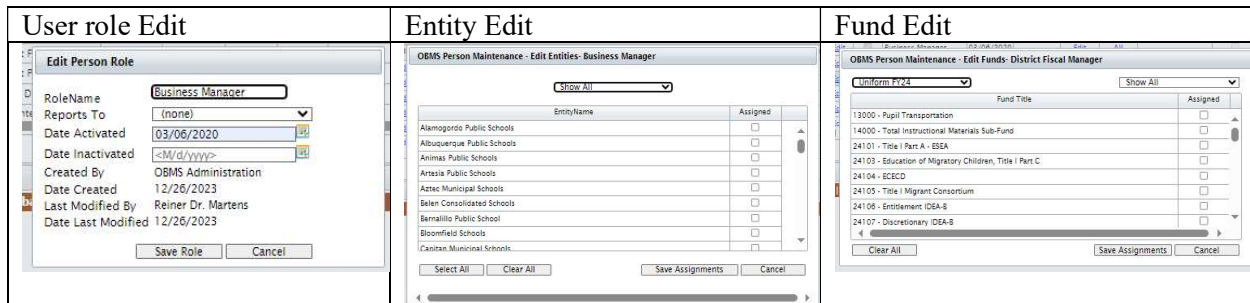
Now click on “Save Login”.

Now click on “Edit Roles”

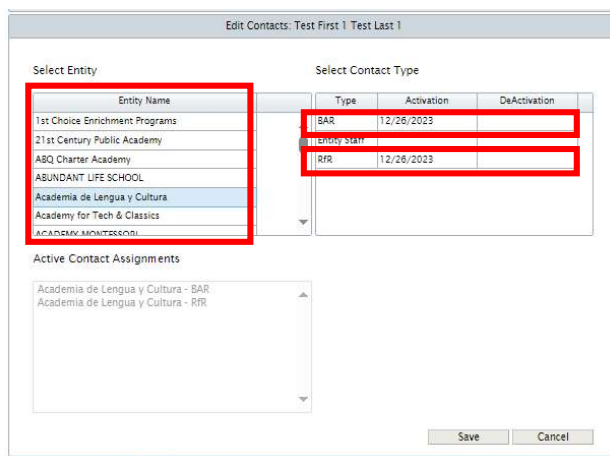


To assign a role to the user, use the appropriate “Edit” and provide the “Activate” Date and click “Save Role”. Click on the “Edit” Entities to assign the correct budget entity to this user and click on “Save Assignments”. In case of the User roles “District Fiscal Manager” and “District Program Manager” 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 for multiple fiscal years, each fiscal year fund combination

must be configured. And always click on “Save Assignments”.



### 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

NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM (Demo2019) Logged In: BusinessManager

PERSON Person | Home

Search Person

Last Name

First Name

Middle Name

Login ID

Sounds Like (First or Last Name search only)

User Active  Not User  Contact Active  Not Contact

Person Search Results

First Name	Middle	Last Name	Title	Login ID	Ph
No records to view					

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

NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM (Demo2019) Logged In: BusinessManager

PERSON Person | Home

Search Person

Last Name

First Name

Middle Name

Login ID

Sounds Like (First or Last Name search only)

User Active  Not User  Contact Active  Not Contact

Person Search Results

First Name	Middle	Last Name	Title	Login ID	Ph
POD		Test		podtest	505-243
Test Contact Fi		Test Contact Last		(none)	5055556
TEST Contact Fi		TEST Contact Last		(none)	5058273
Test First		Test Last	School Board President	testfirsttestlast	505 555
Test First 1		Test Last 1	Test Title	testfirst1testlast1	5059996
test1		test2	test tie1	test1test2	505

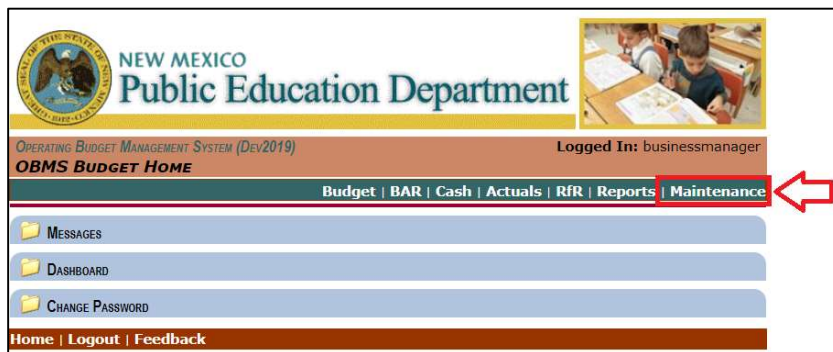
Click “Edit Person” and update the data as learned in “Create a New User”.



## 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

OPERATING BUDGET MANAGEMENT SYSTEM (Dev2019) Logged In: businessmanager

**PERSON** Person | Home

---

Search Person

Add Person:

First Name	Jason	⌵	Users that report to this user:
Middle Name		⌵	
Last Name	Garcia	⌵	
Title	Contact Example	⌵	
Phone	5051234567	⌵	
Cell Phone		⌵	
Email	Jason.Garcia@Example.co	⌵	

Create User:       Create Date:   
 Modify User:       Modify Date:   
 Duplicate User:

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"

OPERATING BUDGET MANAGEMENT SYSTEM (Dev2019) Logged In: businessmanager

**PERSON** Person | Home

---

Search Person

Edit Person: Jason Garcia

First Name	Jason	⌵	Users that report to this user:
Middle Name		⌵	
Last Name	Garcia	⌵	
Title	Contact Example	⌵	
Phone	5051234567	⌵	
Cell Phone		⌵	
Email	Jason.Garcia@Example.co	⌵	

Create User: Business Manager      Create Date: 11/07/2023  
 Modify User: Business Manager      Modify Date: 11/07/2023  
 Duplicate User:

Add Login: Jason Garcia

Add Roles: Jason Garcia

Add Contacts: Jason Garcia

Home | Logout | Feedback

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

Edit Contacts: Jason Garcia

Select Entity

Entity Name
Albuquerque Institute for Math and Science
Coral Community Charter
Middle College High School
NM School for the Blind and Visually Impaired
Robert F Kennedy Charter
Ruidoso Municipal Schools

Select Contact Type

Type	Activation	DeActivation
BAR		
Entity Staff	11/7/2023	
RFR		

Active Contact Assignments

Coral Community Charter - Entity Staff

Save Cancel

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.

Edit Contacts: Test First 1 Test Last 1

Select Entity

Entity Name
1st Choice Enrichment Programs
21st Century Public Academy
ABQ Charter Academy
ABUNDANT LIFE SCHOOL
Academia de Lengua y Cultura
Academy for Tech & Classics
ACADEMY MONTESSORI

Select Contact Type

Type	Activation	DeActivation
BAR		
Entity Staff	12/26/2023	12/26/2023
RFR		

Active Contact Assignments

ABQ Charter Academy - Entity Staff

Save Cancel

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.

Add Contacts: Test First 1 Test Last 1

Select Entity

Entity Name
1st Choice Enrichment Programs
21st Century Public Academy
ABQ Charter Academy
ABUNDANT LIFE SCHOOL
Academia de Lengua y Cultura
Academy for Tech & Classics
ACADEMY MONTPELIER

Select Contact Type

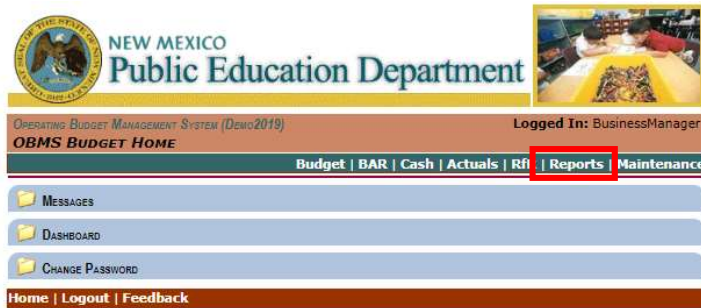
Type	Activation	DeActivation
BAR		
Entity Staff	12/26/2023	12/26/2023
RFR		

Active Contact Assignments

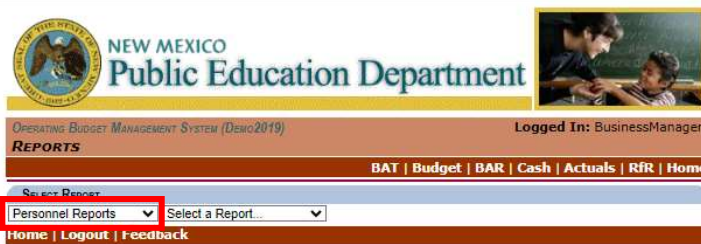
The Contact is removed from the entity.

## 7. Personnel Reports

OBMS has several “Personnel Reports” allowing users to verify personnel OBMS data.

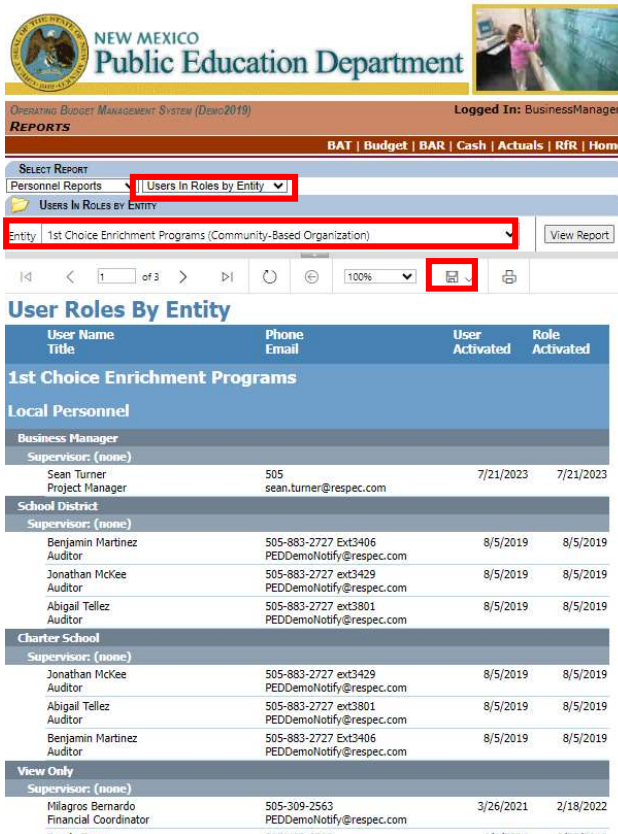


Click on Reports



Within the Personnel Reports several reports exist.

### 7.1. User Role by Entity Report



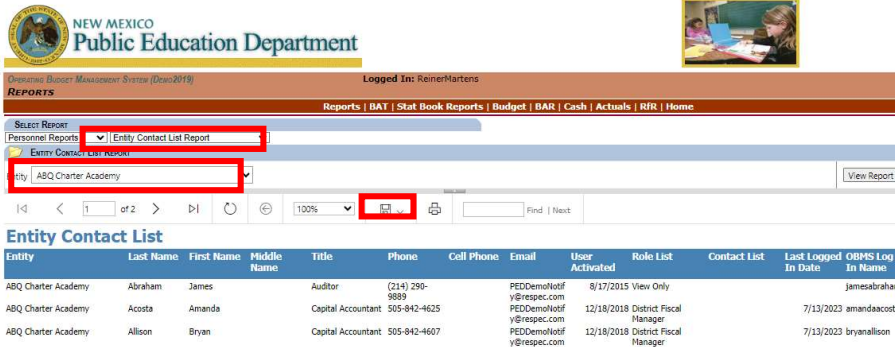
Select the report.

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



NEW MEXICO Public Education Department

Operating Budget Management System (Demo2019) Logged In: ReinerMartens

REPORTS | BAT | Stat Book Reports | Budget | BAR | Cash | Actuals | RFR | Home

Select Report: Personnel Reports | Entity Contact List Report

Entity: ABQ Charter Academy

Entity Contact List

Entity	Last Name	First Name	Middle Name	Title	Phone	Cell Phone	Email	User Activated	Role List	Contact List	Last Logged In Date	OBPMs Log In Name
ABQ Charter Academy	Abraham	James		Auditor	(214) 290-9889		PEDDemoNotif y@respec.com	8/17/2015	View Only			jamesabraham
ABQ Charter Academy	Acosta	Amanda		Capital Accountant	505-842-4625		PEDDemoNotif y@respec.com	12/18/2018	District Fiscal Manager		7/13/2023	amandasacosta
ABQ Charter Academy	Allison	Bryan		Capital Accountant	505-842-4607		PEDDemoNotif y@respec.com	12/18/2018	District Fiscal Manager		7/13/2023	bryanallison

Select the report.

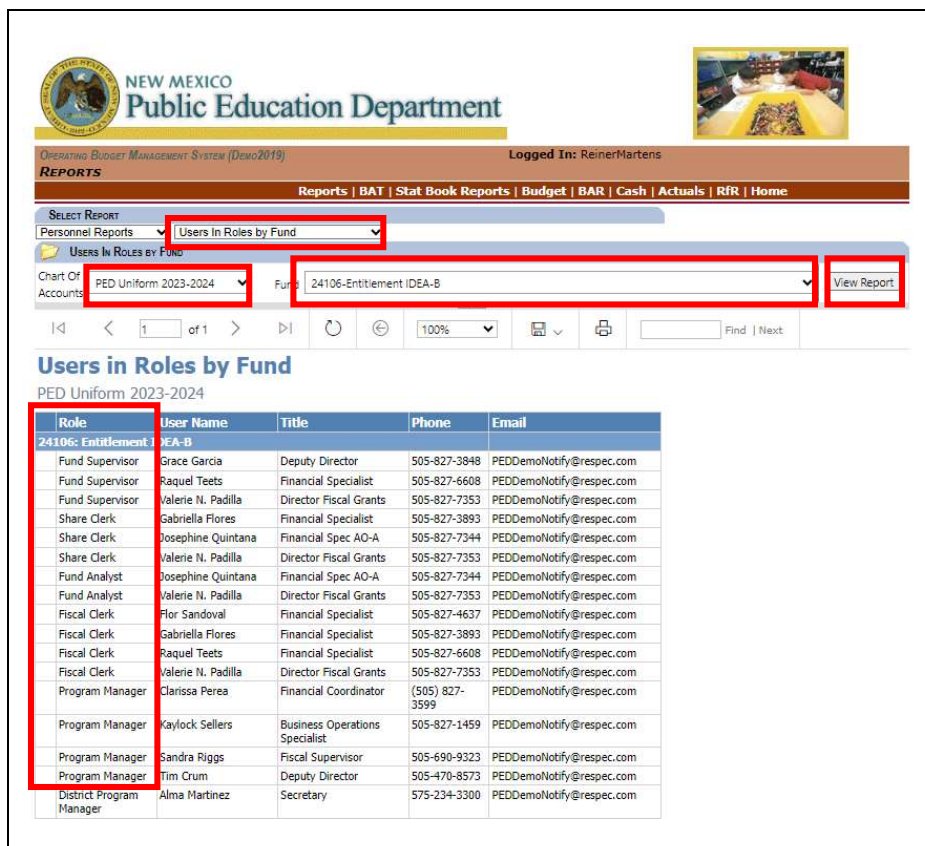
Choose the entity.

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.



NEW MEXICO Public Education Department

Operating Budget Management System (Demo2019) Logged In: ReinerMartens

REPORTS | BAT | Stat Book Reports | Budget | BAR | Cash | Actuals | RFR | Home

Select Report: Personnel Reports | Users in Roles by Fund

Chart Of Accounts: PED Uniform 2023-2024 Fund: 24106-Entitlement IDEA-B

Users in Roles by Fund

PED Uniform 2023-2024

Role	User Name	Title	Phone	Email
24106- Entitlement: IEA-B				
Fund Supervisor	Grace Garcia	Deputy Director	505-827-3848	PEDDemoNotif y@respec.com
Fund Supervisor	Raquel Teets	Financial Specialist	505-827-6608	PEDDemoNotif y@respec.com
Fund Supervisor	Valerie N. Padilla	Director Fiscal Grants	505-827-7353	PEDDemoNotif y@respec.com
Share Clerk	Gabriella Flores	Financial Specialist	505-827-3893	PEDDemoNotif y@respec.com
Share Clerk	Josephine Quintana	Financial Spec AO-A	505-827-7344	PEDDemoNotif y@respec.com
Share Clerk	Valerie N. Padilla	Director Fiscal Grants	505-827-7353	PEDDemoNotif y@respec.com
Fund Analyst	Josephine Quintana	Financial Spec AO-A	505-827-7344	PEDDemoNotif y@respec.com
Fund Analyst	Valerie N. Padilla	Director Fiscal Grants	505-827-7353	PEDDemoNotif y@respec.com
Fiscal Clerk	Flor Sandoval	Financial Specialist	505-827-4637	PEDDemoNotif y@respec.com
Fiscal Clerk	Gabriella Flores	Financial Specialist	505-827-3893	PEDDemoNotif y@respec.com
Fiscal Clerk	Raquel Teets	Financial Specialist	505-827-6608	PEDDemoNotif y@respec.com
Fiscal Clerk	Valerie N. Padilla	Director Fiscal Grants	505-827-7353	PEDDemoNotif y@respec.com
Program Manager	Clarissa Perea	Financial Coordinator	(505) 827-3599	PEDDemoNotif y@respec.com
Program Manager	Kaylock Sellers	Business Operations Specialist	505-827-1459	PEDDemoNotif y@respec.com
Program Manager	Sandra Riggs	Fiscal Supervisor	505-690-9323	PEDDemoNotif y@respec.com
Program Manager	Tim Crum	Deputy Director	505-470-8573	PEDDemoNotif y@respec.com
District Program Manager	Alma Martinez	Secretary	575-234-3300	PEDDemoNotif y@respec.com

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).