

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: <u>OBMS Login Page</u>
- 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.

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RATING BUDGET N	lanagement S	YSTEM (TESTING ENVIRO	NMENT)	Logged In: eli	izabethhugh
RSON				Person (Grants Ho
		Se	earch Person		
Last Name First Name Middle Name Login ID	Bock Michael	۵ ۵ ۵	□ Sounds Like (First or	Last Name search	only)
🗆 Use	r Active	🗆 Not User	Contact Active	Not Co	ontact Search
Person Search	Results				0
First Name	Middle	Last Name	Title	Login ID	Pho

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".

RSON					
				Person (Grants Ho
			Search Person		
Last Name	Bock	0			
First Name	Michael	9	Sounds Like (First c	or Last Name search	onlv)
Middle Name		6			
Login ID		0			
					Search
Person Search	Results				Search
Person Search First Name	Results Middle	Last Name	Title	Login ID	Search Pho Pho
Person Search First Name Michael	Results Middle	Last Name Bock	Title	Login ID michaelbock	© Phr 7576045

5. Next, click "Edit Roles".

			Person	Grants n
	Sea	ch Person		
	Edit Perso	n: Michael Bock		
First Name	Michael	Users that report	t to this user:	
Middle Name	Ø			<u>^</u>
Last Name	Bock			
Title				
Phone	7576045419			
Cell Phone				
Email	Michael.Bock@ped.nm.go 🕖			Ψ.
Create User:	OBMS Administration	Create Date:	09/30/2024	
Modify User:	OBMS Administration	Modify Date:	09/30/2024	
Duplicate User:				
			Save	Cancel
	Edit Logi	n: Michael Bock		
	Edit Role	s: Michael Bock		
	Add Conta	cts: Michael Bock		
e Logout Fee	edback			

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

Create User: OBMS Adm Modify User: OBMS Adm Duplicate User:		iistration		Create Date: Modify Date:		09/30/2024 09/30/2024 Save Cancel		
			Ed	it Login: Mic	hael Bock			
			Ed	it Roles: Mic	hael Bock			
Perso Edit	n Role L Active	role	Activate	Deactivate	Entities	Funds	Reports To	Hide In Repo
C-die		District Fiscal Manager			Edit	Edit		
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Edit Edit		LEA Grant Editor	01/31/2025		Lun			
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Edit Edit Edit Edit Edit Edit		LEA Grant Editor School District Superintendent Supplier Payables	01/31/2025		Edit Edit All	All All All		

 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 add the role to the person in OBMS.



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Phone Cell Phone Email Create User: Modify User:	7576045419	Create Date: Modify Date:	09/30/2024 09/30/2024
Duplicate User:	Edit Person Role		
	RoleName Reports To (nor Date Activated	EA Grant Editor	Cancel
	Date Inactivated </th <th> /уууу></th> <th></th>	/уууу>	
Person Role List	Date Created		
Edit Active	Last Modified By Date Last Modified		To Hide In Repc
Edit Edit LEA 0	Grant Save	Role Cancel	

- 8. 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"

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		Se	arcn Person		
Last Name		٢			
First Name		Ø	□ Sounds Like (First or L	ast Name search or	ıly)
Middle Name		٢			
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c. Then you will see the following screen and complete the required fields to add the individual:

	0 h	D	
	Search	Person	
	Add P	erson:	
First Name	٢	Users that report to this user:	
Middle Name	Ú		-
Last Name	Ú		
Title	Ú		
Phone	Ú		
Cell Phone	Ú		
Email			∇
Create User:		Create Date:	
Modify User:		Modify Date:	
Duplicate User:			
		Save	Cancel

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

d. Hit the "Save" button.

OPERATING BUDGET MANA Person	AGEMENT SYSTEM (TESTING E	Logged In: elizabethhughart	
			Person Grants Home
		Search Pe	rson
		Add Pers	on:
First Name	Mickey	()	Users that report to this user:
Middle Name		Ø	A
Last Name	Mouse	(i)	
Title		()	
Phone	000-000-0000	(i)	
Cell Phone		i	
Email	mickeymouse@aol.com	i	·
Create User:			Create Date:
Modify User:			Modify Date:
Duplicate User:			
			Save Cancel



e. Next, click "Add Login: [new user's name]".

	Se	arch Person
	Edit Pers	on: Mickey Mouse
First Name	Mickey	Users that report to this user:
Middle Name	١	A
Last Name	Mouse	
Title	()	
Phone	000-000-0000	
Cell Phone		
Email	mickeymouse@aol.com	-
Create User:	Elizabeth Hughart	Create Date: 02/10/2025
Modify User:	Elizabeth Hughart	Modify Date: 02/10/2025
Duplicate User:		
		Delete Save Cancel
	Add Log	in: Mickey Mouse
	Add Conta	acts: Mickey Mouse

f. Fill in "Activate Date" and then click "Save Login".

Title Phone Cell Phone Email Create User: Modify User: Duplicate User:	000-0000000000000000000000000000000000	Create Date: 02/10/2025 Modify Date: 02/10/2025 Delete Save Cancel				
	Add Login:	Mickey Mouse				
User Login	<new></new>					
Activate Date	<m d="" yyyy=""></m>					
De-Activate Date	○ Feb ∨ 2025 ∨ ○					
Receive Messa	Su Mo Tu We Th Fr Sa					
Receive Email	1					
	2 3 4 5 6 7 8					
	9 10 11 12 13 14 15					
Signature Date	16 17 18 19 20 21 22					
Create User	23 24 25 26 27 28	eate Date				
Modify User	M	odify Date				
		Save Login Cancel				
	Add Contacts: Mickey Mouse					

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