

# 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.



NEW MEXICO Public Education Department

OPERATING BUDGET MANAGEMENT SYSTEM (TESTING ENVIRONMENT) Logged In: elizabethhughart

PERSON Person | Grants | Home

Search Person

Last Name: Bock  
 First Name: Michael  
 Middle Name:  
 Login ID:

Sounds Like (First or Last Name search only)

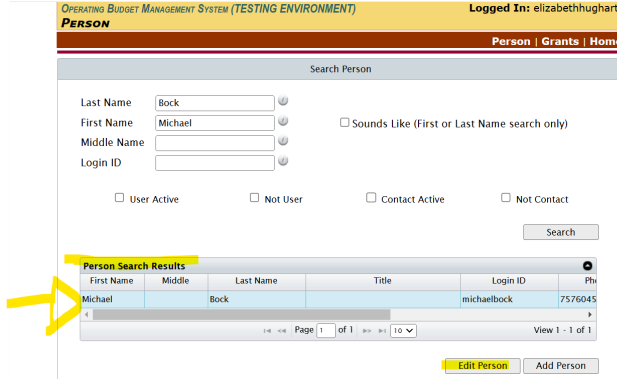
User Active  Not User  Contact Active  Not Contact

Search

Person Search Results					
First Name	Middle	Last Name	Title	Login ID	Ph
Michael		Bock		michaelbock	7576045

- 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”.



OPERATING BUDGET MANAGEMENT SYSTEM (TESTING ENVIRONMENT) Logged In: elizabethhughart

**PERSON** Person | Grants | Home

Search Person

Last Name: Bock  
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Login ID:   
 Sounds Like (First or Last Name search only)

User Active  Not User  Contact Active  Not Contact

Search

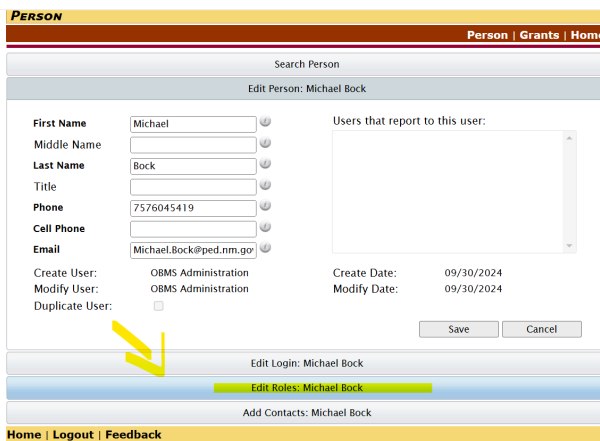
**Person Search Results**

First Name	Middle	Last Name	Title	Login ID	Ph
Michael		Bock		michaelbock	7576045

Page 1 of 1

**Edit Person** Add Person

5. Next, click “Edit Roles”.



**PERSON** Person | Grants | Home

Search Person

Edit Person: Michael Bock

First Name: Michael  
Middle Name:   
Last Name: Bock  
Title:   
Phone: 7576045419  
Cell Phone:   
Email: Michael.Bock@ped.nm.gov

Create User: OBMS Administration  
Modify User: OBMS Administration  
Duplicate User:

Create Date: 09/30/2024  
Modify Date: 09/30/2024

Users that report to this user:

Save Cancel

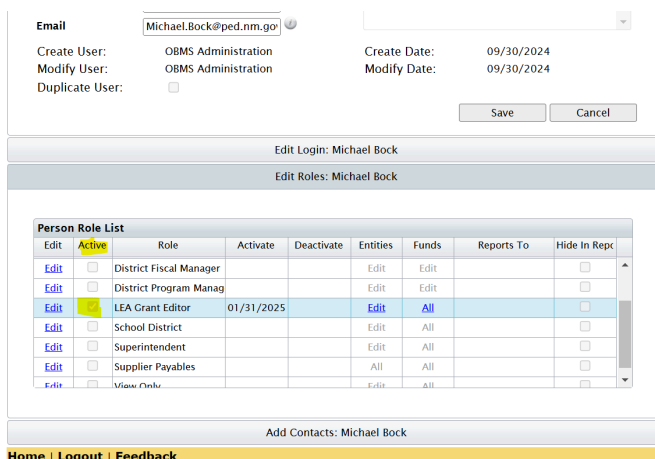
Edit Login: Michael Bock

**Edit Roles: Michael Bock**

Add Contacts: Michael Bock

Home | Logout | Feedback

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



Email: Michael.Bock@ped.nm.gov

Create User: OBMS Administration  
Modify User: OBMS Administration  
Duplicate User:

Create Date: 09/30/2024  
Modify Date: 09/30/2024

Save Cancel

Edit Login: Michael Bock

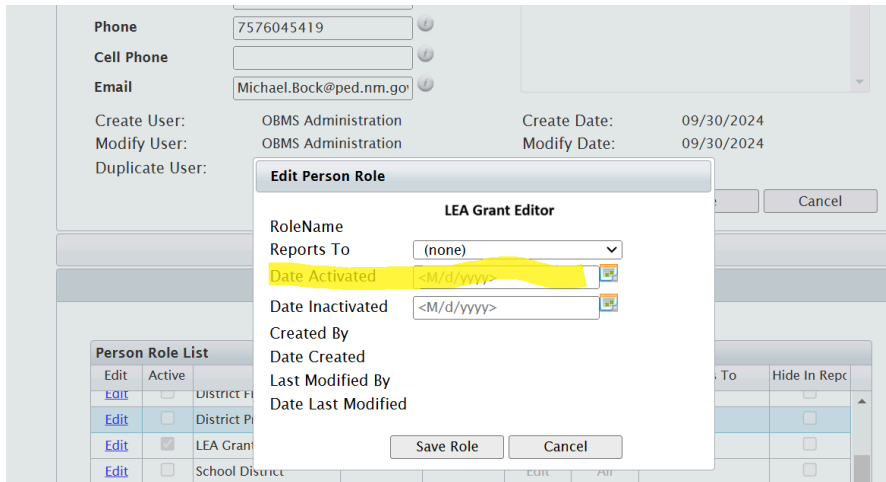
Edit Roles: Michael Bock

Edit	Active	Role	Activate	Deactivate	Entities	Funds	Reports To	Hide In Repr
Edit	<input type="checkbox"/>	District Fiscal Manager			Edit	Edit		<input type="checkbox"/>
Edit	<input type="checkbox"/>	District Program Manag			Edit	Edit		<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>	LEA Grant Editor	01/31/2025		Edit	All		<input type="checkbox"/>
Edit	<input type="checkbox"/>	School District			Edit	All		<input type="checkbox"/>
Edit	<input type="checkbox"/>	Superintendent			Edit	All		<input type="checkbox"/>
Edit	<input type="checkbox"/>	Supplier Payables			All	All		<input type="checkbox"/>
Edit	<input type="checkbox"/>	View Only			Edit	All		<input type="checkbox"/>

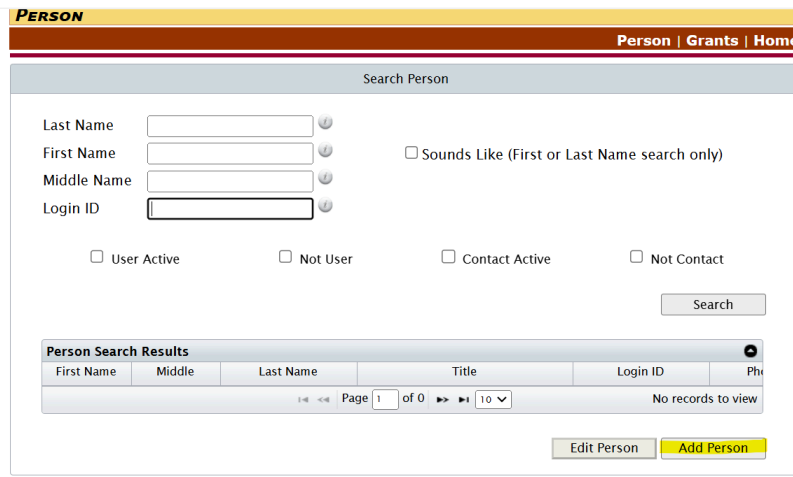
Add Contacts: Michael Bock

Home | Logout | Feedback

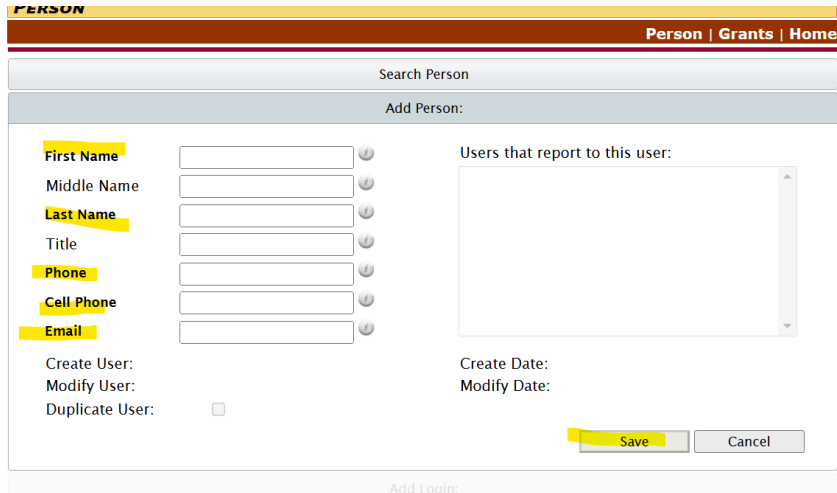
7. Click “Edit” to the left of the role and then click on the mini-calendar in the “Date Activated Field” to add the date of activation, which would be the day you add the role to the person in OBMS.



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”

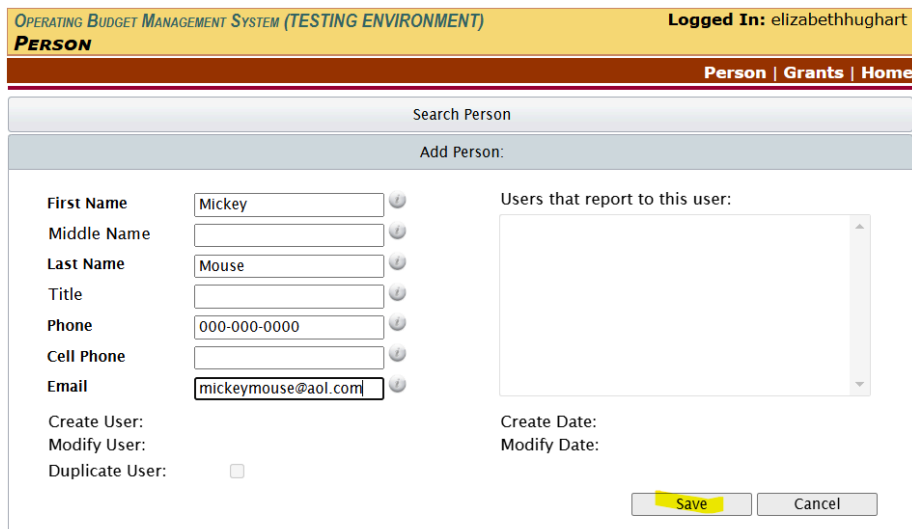


- c. Then you will see the following screen and complete the required fields to add the individual:

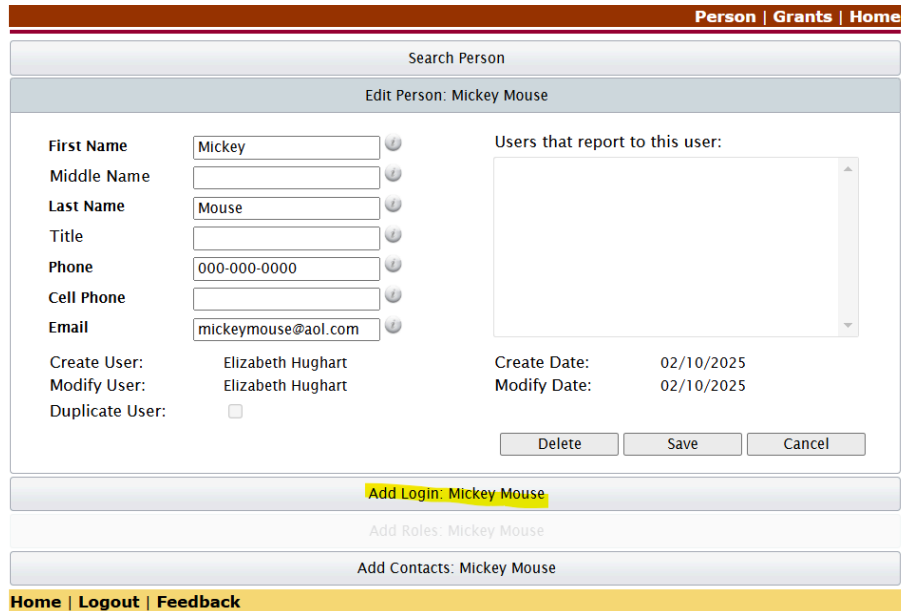


\*Note: Adding a person's Cell Phone number is not required.

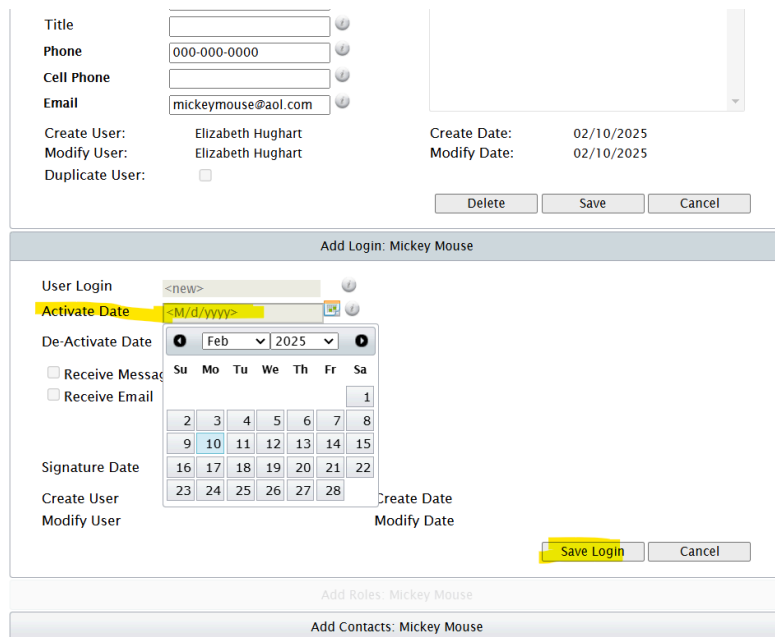
- d. Hit the "Save" button.



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.