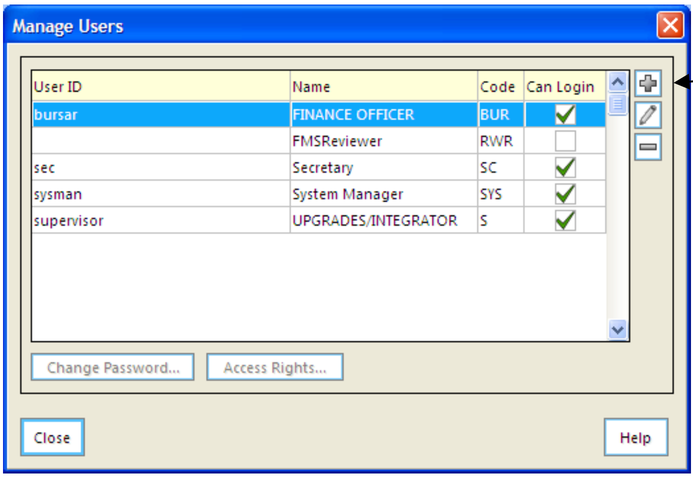
Procedure 1 - Setting Up a New User

There will already be at least one User – **SYSMAN** with a default password. Access Rights for SYSMAN cannot be amended and **under no circumstances must the password be changed.**

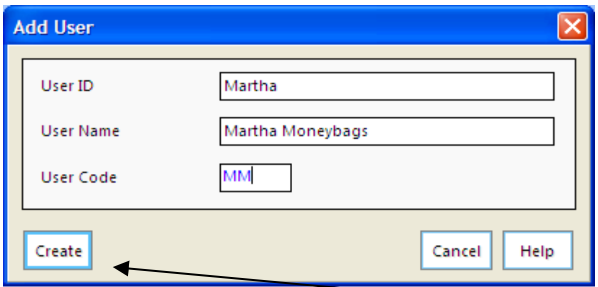
Tools | Manage Users

- Click on on the right hand side to add new user
- Type in User ID e.g. **Martha**
- Type in User name e.g. **Martha Moneybags (**use middle name also if known to avoid duplication of user code**)**
- Type in User Code e.g. **MM** (must be unique for each user)
- Click on **Create**
- Say 'Yes' to the warning message
- Type in Password e.g**. MILLIONAIRE** (this must have a minimum of 6 characters)
- Re-enter the Password e.g. **MILLIONAIRE**
- Click on the **Save** button

*Note: In school you will need to set up all new users of FMS. Remember that this information is **not** stored in the SIMS System Manager module.*



Click to add a new User

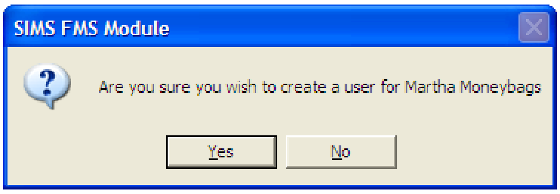


Use the ID that will be used to log on to FMS

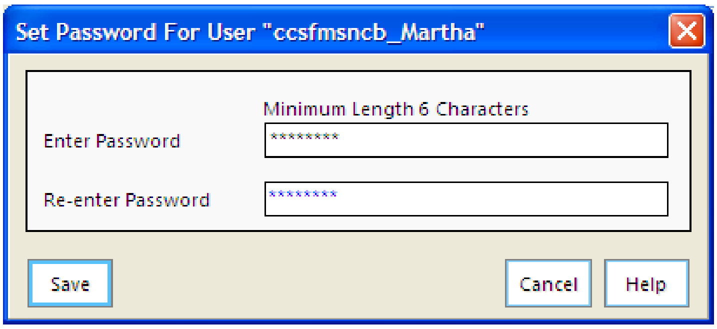
User Name; usually the user's full name

User Code: User's initials

Click on **Create**

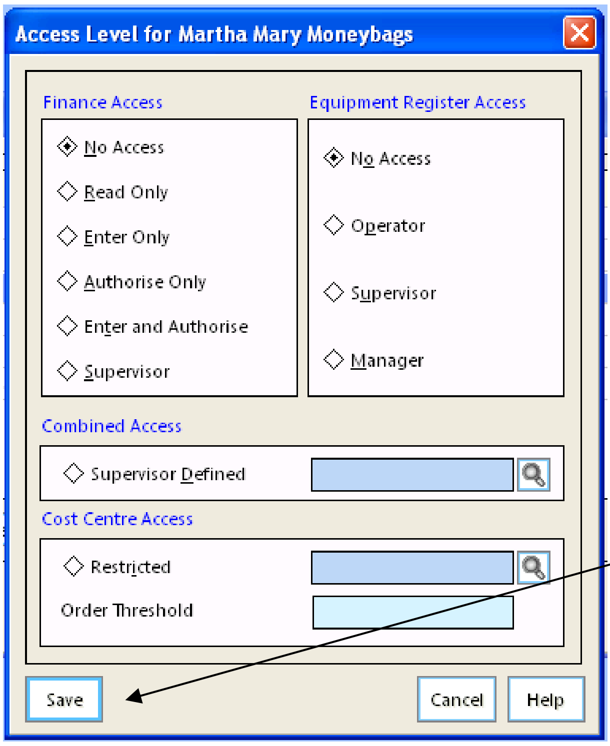


Say ‘Yes’ to the warning message



Enter and Re-enter the Password, then click on **Save**

Passwords should be kept confidential at all times. When setting up a new user, as System Administrator you may wish to issue a generic password which must be changed by the user the first time they log on to FMS.



At this point, the new user has no access rights to the FMS system

Click on **Save**

You have now added a new user but still need to allocate access rights as detailed in the procedure below.

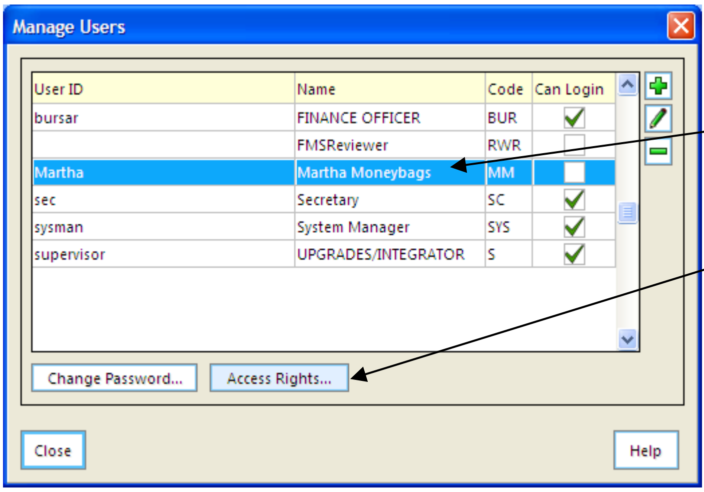
Procedure 2 – Setting Up Access Rights

Once a user has been set up on the system, they must be allocated Access Rights before they can process any transactions.

Log onto FMS as SUPERVISOR

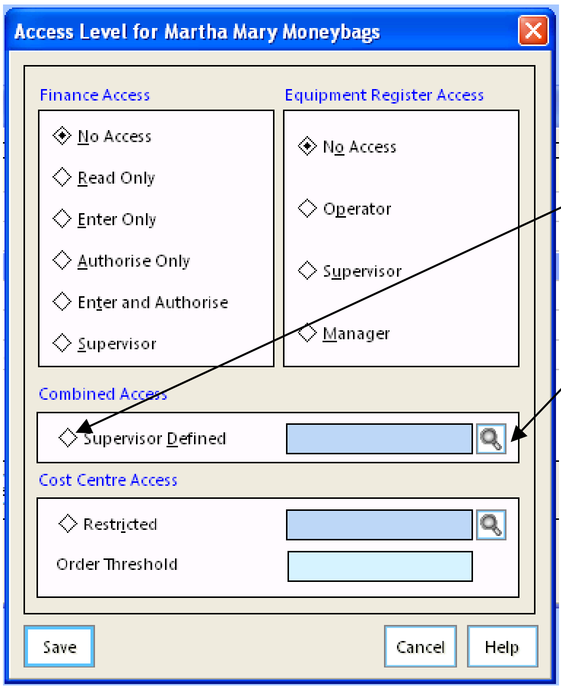
Tools | Manage Users

- Highlight a User
- Click on the **Access Rights** button
- Click on the **Supervisor Defined** radio button then click on the **browser**. Financial Regulations state that all users have Supervisor Defined access to FMS.
- Highlight and **Select** the appropriate Access Level OR click on the button to add a new Access Level

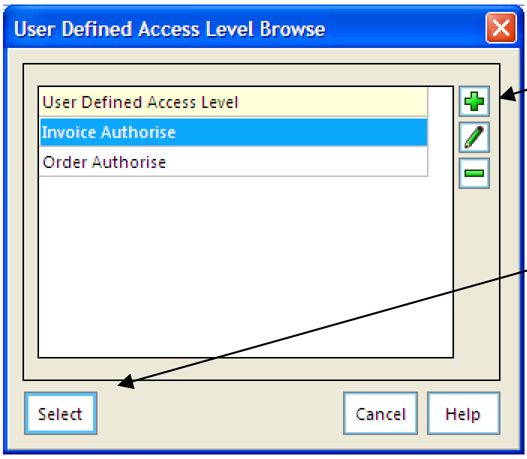


Highlight a User

Click on the **Access Rights** button



Click on the **Supervisor Defined** radio button, then click on the **browser**.



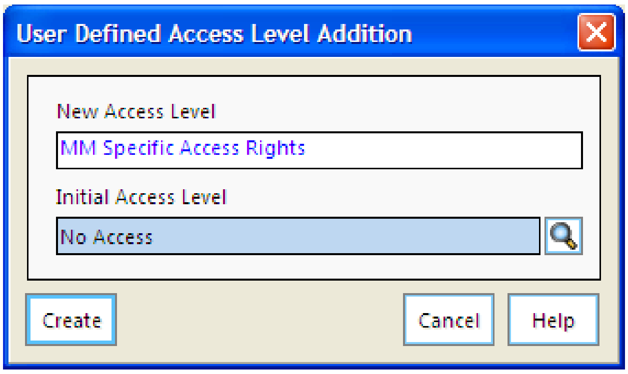
Click on the button to add a new Access Level

OR

Highlight and **Select** the appropriate Access Level

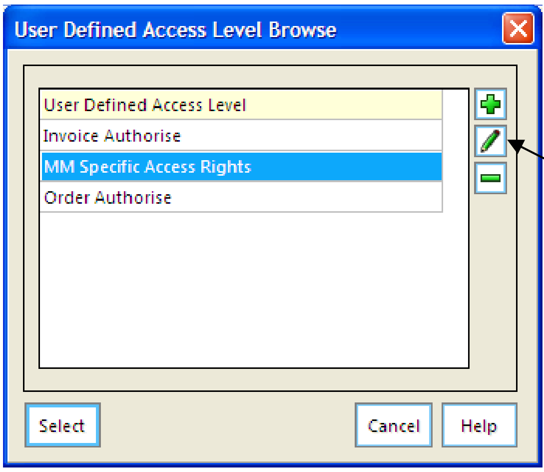
If a New Access Level is to be Created

- Type in a name for the new Access Level (be descriptive) and click on **Create,** leaving the Initial Access Level as ‘No Access’
- **Highlight** the new level that has been created and click on **Edit Key**



Type in the name of the new Access Level

Click on Create

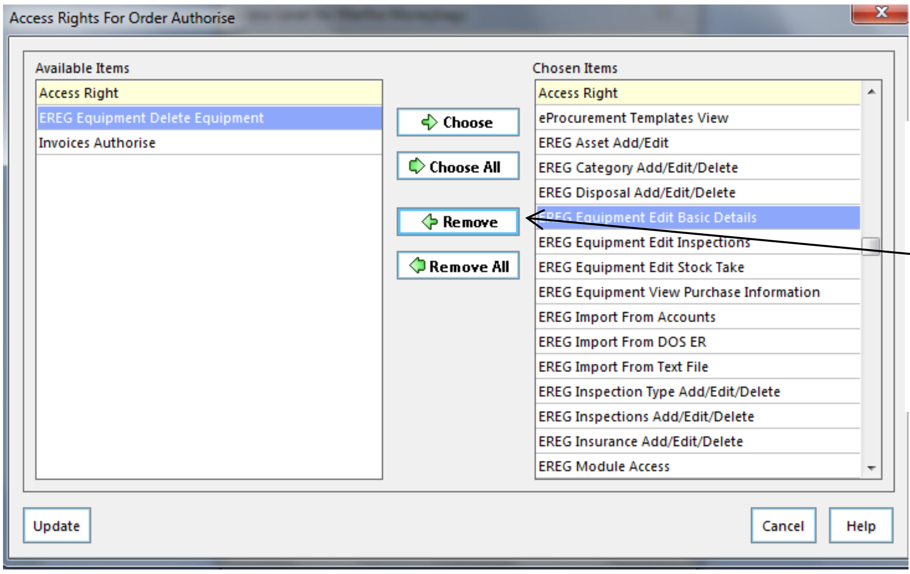


Highlight the new level that has been created

Click on **Edit Key**

- **At this point you will see two columns, one column of ‘Available Items’ and the other ‘Chosen Items’**
- Click on the **Choose All** button at the top, this will choose all processes on the system, all items will then appear under the **Available Items** column. Scroll down the list of **Chosen Items** and highlight a process that is NOT to be chosen and click on the **Remove** button in the middle of the screen (not the remove all button)

- Repeat this process until all items that are not required have been moved back to the Available Items column (e.g. Invoices Authorise, Orders Authorise, etc)
- Click on **Update**
- Making sure the correct Access Level is still highlighted, click on **Select**
- Click on **Save** – Access Rights will now start to initialise
- Click on **Close**



- Highlight the appropriate Access Level
- Click on Remove

IMPORTANT NOTES re Access Rights

- Please ensure that **'MIS Settings Edit'** is chosen for all Access Rights
- No Access Rights should include 'Authorise Invoices' AND 'Authorise Orders' in the Chosen Items column
- The following Access Rights must always remain in the Available Items column:
  - EREG Equipment Delete Equipment