

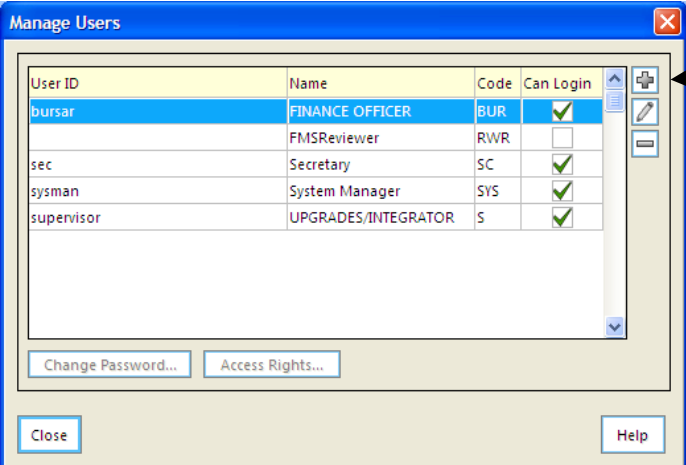
Procedure 1 - Setting Up a New User

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

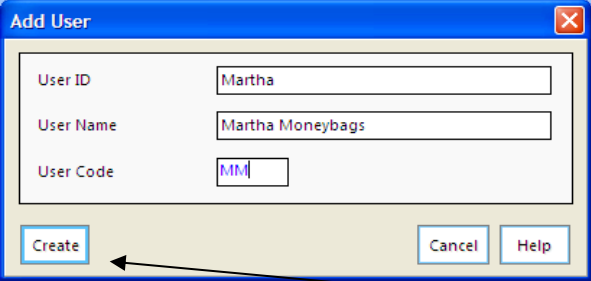
*Note: In school you will need to set up all new users of FMS. Remember that this information is **not** stored in the SIMS System Manager module.*



User ID	Name	Code	Can Login
bursar	FINANCE OFFICER	BUR	☒
	FMSReviewer	RWR	☐
sec	Secretary	SC	☒
sysman	System Manager	SYS	☒
supervisor	UPGRADES/INTEGRATOR	S	☒

Buttons: Change Password..., Access Rights..., Close, Help

Click  to add a new User



Fields:

- User ID: Martha
- User Name: Martha Moneybags
- User Code: MM

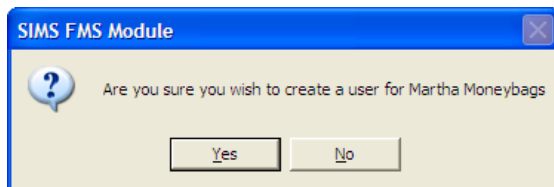
Buttons: Create, Cancel, Help

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

A screenshot of a dialog box titled "Set Password For User 'ccsfmsncb_Martha'". It has two password input fields. The first is labeled "Enter Password" and the second "Re-enter Password". Above the first field is a note "Minimum Length 6 Characters". At the bottom, there are three buttons: "Save", "Cancel", and "Help".

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.

A screenshot of a dialog box titled "Access Level for Martha Mary Moneybags". It contains several sections for setting access rights: "Finance Access" with options like "No Access", "Read Only", "Enter Only", "Authorise Only", "Enter and Authorise", and "Supervisor"; "Equipment Register Access" with options like "No Access", "Operator", "Supervisor", and "Manager"; "Combined Access" with a "Supervisor Defined" option and a search button; and "Cost Centre Access" with a "Restricted" option and an "Order Threshold" field. At the bottom, there are three buttons: "Save", "Cancel", and "Help".

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.

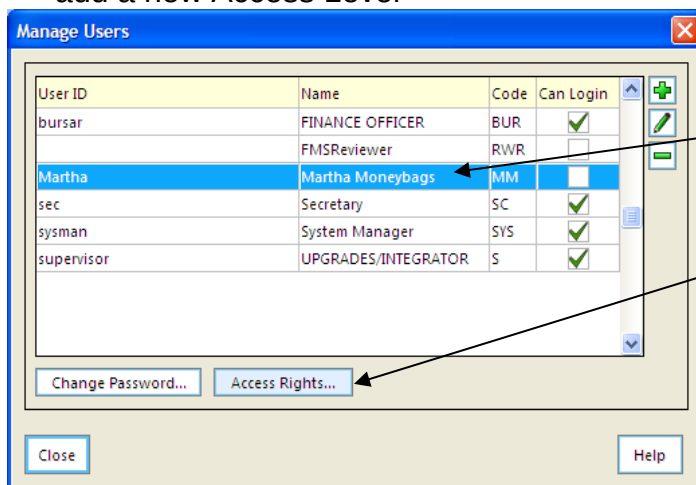
Procedure 2 – Setting Up Access Rights

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

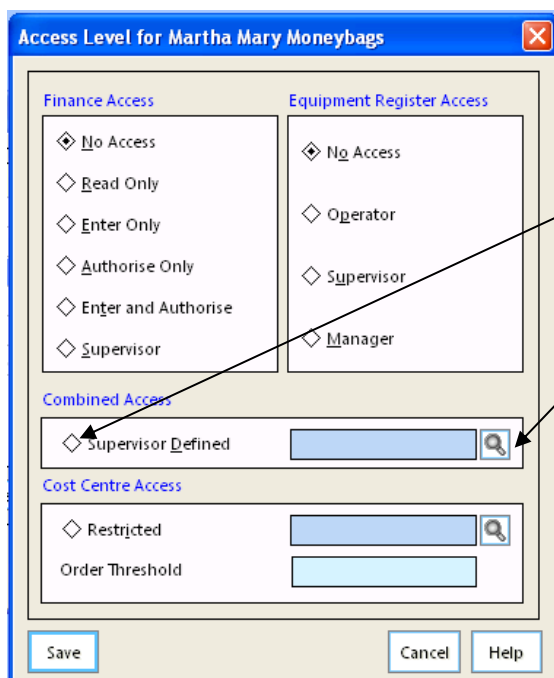


User ID	Name	Code	Can Login
bursar	FINANCE OFFICER	BUR	☒
	FMSReviewer	RWR	☐
Martha	Martha Moneybags	MM	☐
sec	Secretary	SC	☒
sysman	System Manager	SYS	☒
supervisor	UPGRADES/INTEGRATOR	S	☒

Buttons: Change Password..., Access Rights..., Close, Help

Highlight a User

Click on the **Access Rights** button



Finance Access

- ☒ No Access
- ☐ Read Only
- ☐ Enter Only
- ☐ Authorise Only
- ☐ Enter and Authorise
- ☐ Supervisor

Equipment Register Access

- ☒ No Access
- ☐ Operator
- ☐ Supervisor
- ☐ Manager

Combined Access

- ☒ Supervisor Defined

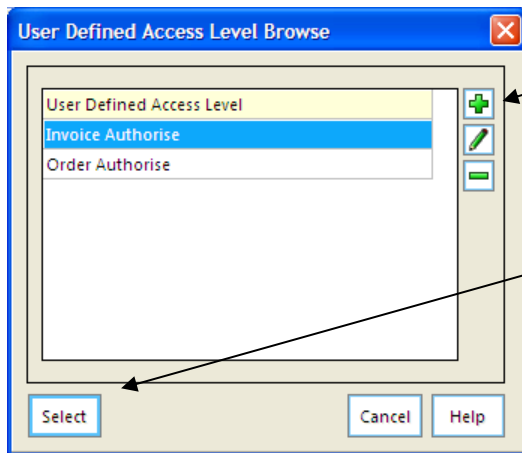
Cost Centre Access

- ☐ Restricted

Order Threshold

Buttons: Save, Cancel, Help

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



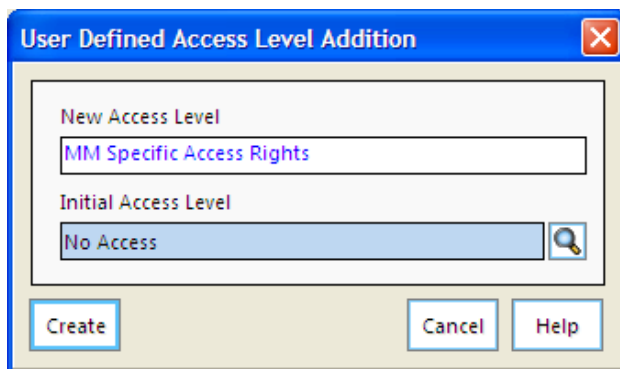
Click on the  button to add a new Access Level

OR

Highlight and **Select** the appropriate Access Level

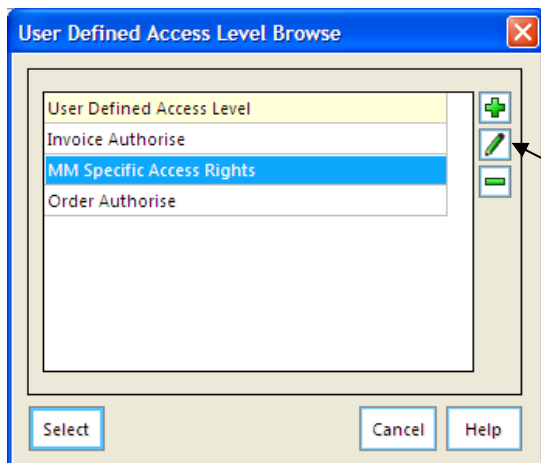
If a New Access Level is to be Created

- 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

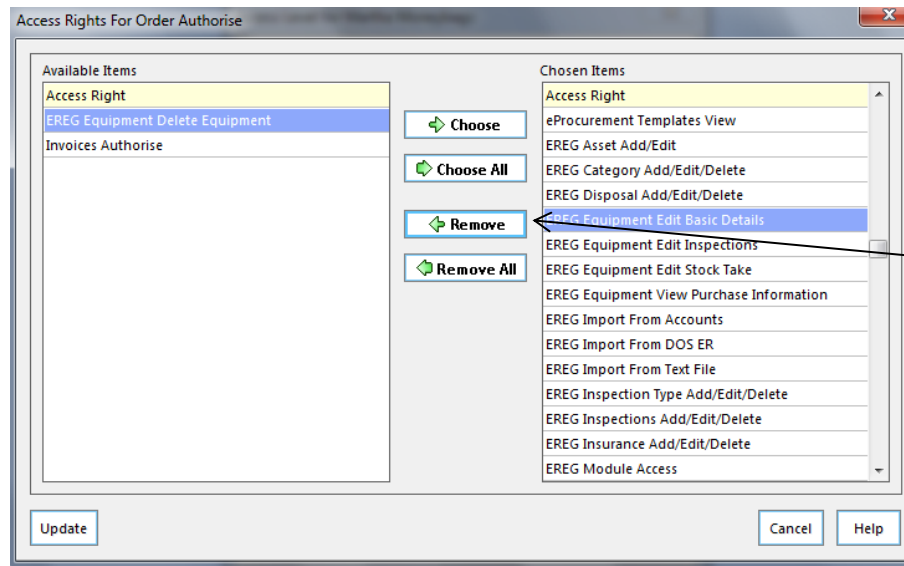


Highlight the new level that has been created

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