Budget Systems User Verification Process

Located in your agency's main SharePoint folder is a list of your agency's current users for the Budget Planning & Analysis System (BPAS), Capital Budget System (CBS), and MMB Budget Division Document Management SharePoint site.

How to Access Your Agency's User Verification Form

Navigate to the pre-filled PDF file named "Budget-Systems-User-Verification..." (or similar) in the main SharePoint folder for your agency.

Budget Division Document Management										
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	-	LAC	5 days ago	Helmers, Jessica A (She/Her/Hers) (MMB)						
	-	Legislative Initiatives	5 days ago	Helmers, Jessica A (She/Her/Hers) (MMB)						
	-	Spending Plan	5 days ago	Helmers, Jessica A (She/Her/Hers) (MMB)						
		Test Agency - Budget Systems User Verificatio	A few seconds ago	Helmers, Jessica A (She/Her/Hers) (MMB)						

You have two options for verifying and/or editing your agency's Budget Systems user list: in your browser window or by downloading a copy to your device.

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Edit the form in your bro	wser	Download a copy, say reupload any chan	ve, and liges	
	Agen	cy: Budget Systems and Operation	ons (TESTING)	
	Budge	et Director/Coordinator Na	Jessica	He
	New		State Employee ID or	
	User	Name Jessica Helmers	8-digit User ID	jes

Recommendation

- *If you have only a few changes:* You can click to edit and save any changes to the file within your browser window.
- If you have more complex changes (edits) or several users needing to be added or removed: You can download and edit a saved copy on your device.

Tip: Remember where you save this file and note the file name if using the Download method – this will help with replacing the current version found in the SharePoint folder after you have reviewed your agency's list of Budget Systems users.

Reviewing Your Agency's List

1. Review each user listed for your agency and confirm that it is accurate.

No Changes Needed

2. *If no change* is needed, email us (<u>budget.finance.mmb@state.mn.us</u>) with the Subject Line, "Systems Users Verification" or similar indicating that no change is needed.

Adding New Systems Users

3. Check the "New User" checkbox to the left of the user's name.

Budge	et Director/Coordinator Na	me:	Jessica	Helmers
New		St Emplo	ate oyee ID	
User	Name	8-digit	User ID	Use
	Jessica Helmers			jessica.helmers@stat
	Aisha Ahmed			Aisha.Ahmed@outloo
	Hiroshi Nakamura			Hiroshi.Nakamura@o
	Miguel Rodri			Miguel.Rodriguez@o
	Prive			Priya.Patel@outlook.
-	avid Martinez			David.Martinez@outl
	Mei Chen			Mei.Chen@outlook.co
	Robert Brown			Robert.Brown@outlo
	Linds			Linda.Wilson@outloo
 Image: A second s	atima Al-Mansouri			Fatima.Al-Mansouri@

- 4. Enter the new user's: Name, Employee ID (if available), and Email Address.
- 5. Choose the "Role" from the dropdown and type in the *3-digit agency code* for each system the user should have access to:

Agenc	y: Budget Systems and Operatio	ons (TESTING)			
Budge	et Director/Coordinator Na	me: Jessica	Helmers		Email:
New User	Name	State Employee ID or 8-digit User ID	User Email	CBS Role	CBS Agency Code
	Jessica Helmers		jessica.helmers@state.mn.us	Agency -	A001
	Aisha Ahmed		Aisha.Ahmed@outlook.com	Agency -	A001
	Hiroshi Nakamura		Hiroshi.Nakamura@outlook.com	No Acces 👻	A001
	Miguel Rodriguez		Miguel.Rodriguez@outlook.com	No Acces 🝷	A001
	Priya Patel		Priya.Patel@outlook.com	Ag. cy -	A001
	David Martinez		David.Martinez@outlook.com	Agency	A001
	Mei Chen		Mei.Chen@outlook.com	Agency	A0 <mark>(</mark> 1
	Robert Brown		Robert.Brown@outlook.com	No Access	A0 <mark>1</mark>
	Linda Wilson		Linda.Wilson@outlook.com	THU ALLES	10001
	Fatima Al-Mansouri		Fatima.Al-Mansouri@outlook.com	No Acces 👻	A001
				•	

6. Repeat for multiple users who need system access.

Tip: If you need more room to add users, download a blank <u>Budget Systems User Authorization Form</u> from the Statewide Budget Systems webpage.

Removing Systems Users

7. Check the *Remove All System Access* checkbox if the user should be **removed from ALL systems** (BPAS, CBS, and MMB Budget Division SharePoint Site).

Idge	t Director/Coordinator Na	me: Jessica	Helmers			Email	jessica.heli	mers	@state.m	n.us			
ew ser	Name	State Employee ID or 8-digit User ID	User Email	CBS Role		CBS Agency Code	BPAS Role		BPAS Agency Code	SharePoint Role		Share- Point Agency Code	Remove All Systems Access
	Jessica Helmers		jessica.helmers@state.mn.us	Agency	•	A001	Agency	•	A001	Agency Legislative Init	- /	A001	
	Aisha Ahmed		Aisha.Ahmed@outlook.com	Agency	•	A001	Agency	•	A001	Agency	- /	A001	
	Hiroshi Nakamura		Hiroshi.Nakamura@outlook.com	No Acces	•	A001	Agency	•	A001	Agency	- /	A001	
	Miguel Rodriguez		Miguel.Rodriguez@outlook.com	No Acces	•	A001	Agency	•	A001	Agency	- /	A001	
	Priya Patel		Priya.Patel@outlook.com	Agency	•	A001	Agency	•	A001	Agency	- /	A001	
✓	David Martinez		David.Martinez@outlook.com	Agency	•	A001	Agency	•	A001	Agency	- /	A001	
	Mei Chen		Mei.Chen@outlook.com	Legislativ	-	A001	Legislative	-	A001	Gov Office Policy Advis	- /	A001	
	Robert Brown		Robert.Brown@outlook.com	Agency	-	A001	Agency	•	A001	Agency	- /	A001	1
	Linda Wilson		Linda.Wilson@outlook.com	No Acces	•	A001	Agency	•	A001	Agency	- /	A001	
✓	Fatima Al-Mansouri		Fatima.Al-Mansouri@outlook.com	No Acces	•	A001	Agency	•	A001	Agency	- /	A001	
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8. If a user should be **removed from a single system**, select the "No Access" option from the Role dropdown menu, and delete the agency code.

	Budget Systems User Authorization Form												
Agen	gency: Budget Systems and Operations (TESTING)												
Budg	et Director/Coordinator Na	me: Jessica		Email	jessica.helm	ners(@state.m	n.us					
New User	Name	State Employee ID or 8-digit User ID	User Email	CBS Role	CBS Agency Code	BPAS Role		BPAS Agency Code	si				
	Jessica Helmers		jessica.helmers@state.mn.us	Agency 👻	A001	Agency	-	A001	Agency Le				
	Aisha Ahmed		Aisha.Ahmed@outlook.com	Agency 🔫	A001	Agency	-	A001	Agency				
	Hiroshi Nakamura		Hiroshi.Nakamura@outlook.com	No Acces 🔫	A001	Agency	-	A001	Agency				
	Miguel Rodriguez		Miguel.Rodriguez@outlook.com	No Acces 🝷	A001	Agency	-	A001	Agency				
	Priya Patel		Priya.Patel@outlook.com	Agency 👻	A001	Agency	-	A001	Agency				
	David Martinez		David.Martinez@outlook.com	Agenc	A001	Age,		A001	Agency				
	Mei Chen		Mei.Chen@outlook.com	Legislativ	A001	Legislative	-	201	Gov Office				
	Robert Brown		Robert.Brown@outlook.com	No Acces 👻		No Access	<u>}-</u> [-	No Access				
	Linda Wilson		Linda.Wilson@outlook.com	No Acces 👻	A001	Agency		A(01	Agency				
	Fatima Al-Mansouri		Fatima.Al-Mansouri@outlook.com	No Acces 🝷	A001	No Access		AC 01	Agency				
				-			- 1						
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- 9. Repeat for multiple users who need access removed.
- 10. Save changes to the PDF with your agency's user list in the browser or upload your saved file.

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Bud	get Director/Coordinat	or Name: Jessic	a Helmers	_	Emai	e jessca.heim	ors.Putate.#	H-101		
		State Employee ID W	line final	CB	CBS Agency Code	BPAS	BPAS Agency Code	SharePoint	Share Paire Agene	All Systems Access
	TODICA Pathana	Figt our o	jesses helmen@state.mn.as	Agency	AULT	Agency	ADDI	Agency Legislative Initiative	ADES	- ALLER
	Aisha Ahmed		Akha Ahmedi@outlack.com	Agency	AUDS	Agency	A001	Agency	A001	
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11. Reload your browser window or refresh your agency's folder page and confirm that those changes have been successfully updated.

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	B	Test Agency - Budget Systems User Verificatio 🔅	A few seconds ago	Helmers, Jessica A (She/Her/Hers) (MMB)	

Timely certification of your agency users will ensure that your team has appropriate systems access for the Biennial Budget process.

Questions

If new Budget Systems users need to be added after the User Verification due date, download and send a new Budget Systems Authorization Form to MMB Budget Operations at <u>budget.finance.mmb@state.mn.us.</u>

Contact us at <u>budget.finance.mmb@state.mn.us</u>, if you have questions about the user verification process or system roles.

• **Note:** The Fiscal Note Tracking System (FNTS) access and authorization is administered by the <u>Legislative Budget</u> <u>Office</u>. Appropriation Maintenance Application (AMA) security access and roles are tied to the security for the State of Minnesota accounting system, <u>SWIFT</u>.