How to Submit an eUMB User Authorization Form

Use the online eUMB User Authorization Form when requesting access to any of the following applications:

- eUMB Financials
- eUMB HRMS
- eForms (eTravel, Taleo)
- RAVEN Inquiry (Financials Inquiry, COEUS Inquiry, PCard Inquiry, Statement of Payroll Charges Inquiry)

UMID and **Password Are Required**: A UMID and password are required to complete an online user authorization form. If you do not have a UMID/password yet, ask the appropriate person in your department to submit the form on your behalf.

Locate the Forms: To complete and submit a User Authorization Form, point your browser to the <u>login</u> <u>page</u> (https://cf.umaryland.edu/eumb-forms/). You will be required to authenticate by entering your UMID, password and by responding to Duo. Click the link titled, "Submit an eUMB Authorization Form".

Select the Desired Form: Review the applications listed and select the form you need. A link to role descriptions is included to the right of each application's form options. (Central office staff: Most central office roles are <u>not</u> included in the role descriptions documents. Please talk with your manager for details on the roles you will need.) Click to select the desired form.



Figure 1 - Screenshot of Applications and Role Descriptions

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Identify User Requesting Access: After selecting a form, you are prompted to choose whether you are submitting this form for yourself or on someone else's behalf.

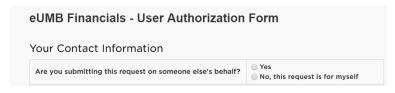


Figure 2 - Screenshot of Contact Information Options

- For Yourself: If you are completing the form for yourself, the form will auto-populate your name.
- On Someone Else's Behalf: If you are submitting a form on behalf of someone else, begin typing
 their name. A directory of valid names will pop open. Select the correct user name.
 IMPORTANT: As soon as you submit the form, the user you select will receive an email request.
 For the authorization request to move to the Approver, the named user must respond to this
 email.

Request Type: After selecting from the following options, click the Next button.

- New: User does not currently have any [application name] access add role.
- <u>Change</u> User currently has [application name] access change role(s) or department(s) for workflow routing.
- <u>Delete</u> Completely remove user's [application name] access for all departments delete role(s). (Caution: This options removes <u>all</u> access for <u>all</u> departments not just your department.)

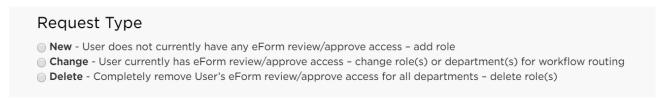


Figure 3 - Screenshot of Request Type for eForms application

Specify Approver in Employing Unit: Begin typing the name of the Department Chair/Unit Director who must approve this access request. A directory of valid names will pop open. Select the correct name.

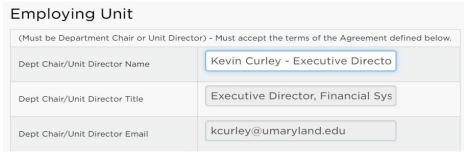


Figure 4 - Sample Showing Employing Unit Section

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When you submit the request, the form generates an email to the approving manager you specified. IMPORTANT: For the authorization request to move to the next step - the CITS team - the named Department Chair/Unit Director must respond to this email.

The balance of the user authorization form deals with adding or removing the role(s) you specify. You will be prompted to fill out each section as you move through the form.

Where Department IDs are requested, they are REQUIRED (see screenshot).



Figure 5 - Sample Showing Required Field

Options for Including Additional Information: The form provides two options for sharing additional information. After completing any uploads (if necessary), click the Next button.

Upload Documents (acceptable file formats: Word, Excel and PDF)

Click Here to upload documents (i.e. transcripts, certificates)
Uploaded files will appear on the confirmation page.
Comments:

Figure 6 - Sample of Upload Documents Section

- <u>Upload documents</u>: The form supports uploading Word, Excel or PDF documents. Uploaded documents are attached to your access request form and are available for review by your department's approver and the CITS team.
- <u>Comments field</u>: Add comments which may be useful in clarifying as it is reviewed by approvers and/or the CITS security team.

Final Review and Edit: The data you've entered is presented for a final review. Use the Edit link next to each of the 6 sections to correct or update any information before submitting the form.

Request Type <u>Edit</u>

Employing Unit <u>Edit</u>

Assign/Remove Access <u>Edit</u>

Figure 7 - Sample of Edit Links for Final Review

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Submitting Your Form: After completing your review and any edits, click the Submit Form button to send your form for approval. The route your form follows depends on whether you are submitting the form for yourself or on behalf of someone else.



Figure 8 - Submit Form Button

- <u>Submitting Form for Yourself:</u> If you are submitting the form for yourself, the form routes to the Department Chair/Unit Director you specified earlier.
- <u>Submitting on Behalf of Another:</u> If you are submitting this form on behalf of another person, the form routes to that person first. On their approval, the form routes to the Department Chair/Unit Director you specified earlier.
- <u>Final Approval and Access:</u> On completion of the approvals above, the form is routed to the CITS team. The team reviews your form for data needed to grant access, grants access in the application and marks the form complete.
- <u>Notification of Access:</u> When your form is marked complete, the requesting user is sent an email notifying you (or the other user) that the request for access has been granted.

NOTE: All email correspondence from the online User Authorization forms will come from webdevelopment@umaryland.edu. If for some reason you do not see any of these emails in your Inbox, please check your Clutter or junk mail folders.

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