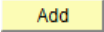



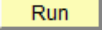
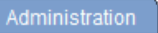


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eUMB HRMS Role Validation Instructions

Purpose: Instructions for accessing the eUMB HRMS User Security Roles report and DocuSign to complete the role validation process. **Note:** to run this report you must hold the eUMB HRMS Department Administrator or the Department HR Representative role.

1. Open **eUMB HRMS**.
2. Navigate to **UMB Utilities Menu > UMB Security > UMB Roles Validation Report**
3. If you already have a **Roles Validation Run Control ID**, search, select it and move on to Step
4. For those who need to **create a Run Control ID** for the Roles Validation Report:
 - a. The Run Control ID stores settings for running a report. If you have not done so already, you should **create a Run Control ID for the Roles Validation Report**. Use this Run Control ID each time you run this report.
 - b. **To create a new Run Control ID: click the Add a New Value tab.**
 - c. **Enter a name** for your new Run Control ID. Run Control IDs can contain up to 30 characters - uppercase, lowercase or mixed including numbers, dashes or underscores. They cannot include spaces. Some valid examples are: RolesValidationRpt or Roles_Validation_Rpt123 or Roles-validation-rpt)
 - d. Click the **Add** button. 
4. The report can be setup several ways:
 - a. To run for **all of your departments** at once:
 - i. Leave the **Dept ID** field blank.
 - b. To run for a **specific department or group of related departments**:
 - i. Enter a Department ID in the **Dept ID** field.
 - c. If you **don't know the Department ID**, search by (department) Description:
 - i. Click the **Lookup** button. 
 - ii. Click the **Advanced Lookup** link. [Advanced Lookup](#)
 - iii. In the **Description** field, click the dropdown. Select 'Contains'. 
 - iv. In **Description**, enter a key word from the department name. Examples: Enter Medicine to search for 'Department of Medicine'. Enter Pharm to search for any department containing words which begin with those characters (such as Pharmacology, SOP Pharm Hlth Srv Rsch, SOP Pharmaceutical Sci Dept or School of Pharmacy).
 - v. Click the **Department** ID to select. [Department](#) The Dept ID and name now appear on the report setup page. 
5. Click the **Run** button. 
6. The Process Scheduler Request page opens. Do not change any settings. Click **OK**.
7. If you are running more than one instance of the report, write down the **Process Instance ID**. [Process Instance:2386359](#)
8. **REMINDER:** Allow reports to run to completion before re-using a Run Control ID.

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9. **View results** from the Report Manager > Administration tab or the Process Monitor page. The following steps refer to viewing from the **Report Manager > Administration tab**. If you prefer to run reports and return later to view them, navigate directly to the page by following Reporting Tools > Report Manager > Administration tab.
 - a. Report information appears on the **Report Manager > Administration tab** as soon as the report has run to success and Status=Posted. For most Roles Validation reports this takes a few minutes at most.
 - b. Click the **Report Manager** link. [Report Manager](#)
 - c. Click the **Administration** tab. 
 - d. Click the **Details** link [Details](#) on the appropriate row. (Use the Prcs Instance column to identify the correct instance of a report if you've run it more than once.)
 - e. Click the **PDF** link [umrhr368_930594.PDF](#) to open the report and validate that everyone is still a valid employee and has the appropriate roles for their job duties, using the [eUMB HRMS Role Definitions](#) document where needed.

NOTES on Using the Roles Validation Report in eUMB HRMS:

1. **Includes Active Employees and Affiliates Only:** The UMB Roles Validation Report displays data only for Active Employees or Affiliates. Be sure to **REMOVE roles for Affiliates** who change responsibilities or leave the department. If the role is not removed, the Affiliate will continue to have access until their access expires (up to 12 months).
2. **Access Dept ID** = the named user has access to view and/or complete role-related transactions for the listed department ID.
3. **User Dept ID** = the department which “owns” the named user; the user’s home department.
4. **Access Dept ID = Dept ID outside your area:** In most cases the named user’s home department is outside the department you are viewing. The named user has access to view and/or complete a role-related transaction for the department you are viewing. Example: A user in another department may have access to serve as a backup for your department when requested.
RECOMMENDED ACTION: Research further to determine if such access is still required.
5. **‘Outside Home Dept?’ column** = a user “owned” by another department has access to view and/or complete role-related transactions for the department you are viewing.

Using DocuSign to sign and date the report validation statement.

1. Access DocuSign and set up your account with the following steps:
 - a) To Login, click: <https://account.docusign.com>
 - b) At the DocuSign Login page, enter your UMB email address
 - c) Click the yellow “CONTINUE” button
 - d) You will be directed to the UMB Login to DocuSign page
 - e) Enter in your UMID and Password
 - f) Click the “Login” button
 - g) Complete DUO authentication
 - h) Once authentication is complete then you will arrive at your DocuSign home page
 - i) Watch the [DocuSign Account Video Tour](#) to learn how to navigate within DocuSign

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2. If you are not already set up as a DocuSign Sender, request the Sender role using the [DocuSign Security Change Request form](#) before you continue. It may take one business day to process so please plan accordingly. Training is not required before the role request is granted, but it is suggested. Training information is available at www.umaryland.edu/docusign.
3. As a DocuSign sender, you can now start to sign your own document. Click the red Start button, choose Sign a Document and Upload the User Security Roles PDF report you saved earlier. Clicking Sign will open that document in DocuSign. Click the red Continue button and page down to the last page with the certification statement and signature lines.
4. You can then drag and drop the appropriate fields from the left menu options onto the lines of the report. When you are done, click the red Finish button.
5. Fill in the Sign and Return box with the name and email address as follows (see below) and **change the Subject line to the School, Department or Org number(s) the signed report represents**. When completed, click Send and Close.

Sign and Return ×

Send your signed document to anyone you would like. Enter an optional email address below.

Full Name: **Email Address:**

+ADD RECIPIENT

Subject:

Message:

250 characters remaining

SEND AND CLOSE **NO THANKS**

6. That will send the completed and signed Quantum Financials User Security Roles report to the role validation email box. CMAS will monitor this box and follow-up with the sender if there are any questions. You can now log out of DocuSign.
7. For assistance with the DocuSign process outlined here, view this [video](#). You can also contact CMAS using rolevalidation@umaryland.edu.