

# User Management Security Access Request Portal

## Guide for Requesting Officials



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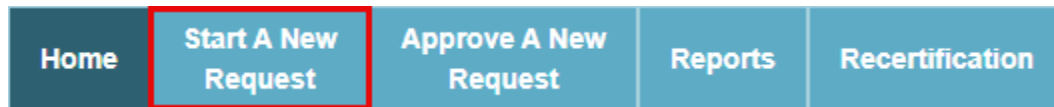
To access the Manager Request Portal login screen, visit: <http://umsap-manager.mcpsmd.org>  
Use your MCPS Outlook username and password to log in.

*Note: You must use the Chrome browser to access this application.*

## Create a New Request

1. On the UMSAP homepage, click **Start a New Request**.

*Note: If you would like to delegate this process to someone else, see 'Add a Requester.'*



2. Search for the employee who requires access using the search box. Select the correct employee from the results and click **Add**.
3. The employee's information will populate below. Confirm the correct employee has been identified, then click the green **Start** button.
4. The Create a User Request form will appear with the employee's information.  
*Note: Multiple results may appear. Only one result may be selected at a time.*

5. Complete the additional required fields.

- **Request Type:** Click **New** (see 'Modify a Request' to learn about modifying an existing request).
- **Business System:** Using the drop-down menu, select the business system to which the employee requires access.

*Note: Users requesting access to School Funds Online (SFO) or the Business Hub+ MUST complete the corresponding PDO training prior to requesting access. Please allow 24 hours after training completion to see it reflected in UMSAP. An error message will be displayed if the employee has not completed all required training. No new request should be initiated until training has been satisfied.*

- **Access Form:** Using the drop-down menu, select the form name/number required to complete the request.

- **Job@Location:** Using the drop-down menu, select the correct position and location for the request.

*Note: The job/location selected will impact the access request. If the job selected ends or changes, access will be revoked.*

6. When all required fields have been completed, click **Next**.

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All employees have the Expenses role in the Hub+ by default, so no UMSAP request is required for this role. However, those required to submit expenses for reimbursement are highly encouraged to take the Expenses online training.

7. You will now complete the electronic form of the access request. Complete all required fields (indicated with an asterisk '\*').

Optional - if additional access beyond the standard access given is being requested, or if access is being requested for an atypical position, you must complete the **Justification** section.

*Note: Requests that include special access follow an extended approval process.*

8. Click **Next**.
9. Type your **Employee ID Number** in the text box, and click, "**I Agree**".

The initial request has been submitted. Both the requesting official and the employee will receive a confirmation email.

The requesting official can view the status of the request by running a report.

After the request has been submitted by the requesting official, the end-user (employee who needs access) will need to take the following steps to continue the approval process:

1. From the confirmation email, the end-user will click on the link provided in the body of the e-mail.  
*Note: The link is single use. Once the user has clicked on the link and logged into the portal, they will not be able to use this link again to access the portal. Only end-users with active requests will be able to access the portal.*

**MONTGOMERY COUNTY PUBLIC SCHOOLS**  
Office of Strategic Initiatives  
User Management Security Access Request Portal

Your director, principal, or supervisor has submitted a request for you to receive access to [MCPS Business Hub](#). This process replaces the paper request form, which is no longer accepted.

**Action is required on your part:** To complete the request process, click on the link below to accept the terms of this access.  
[User Management Access Request - End User Portal](#)

**Request Details:**  
User:  
Login:  
Location:  
Requesting Official:

This is an automated message, please do not reply. If you need additional assistance, please submit a Help Desk ticket by emailing [helpdesk@mcpsmd.org](mailto:helpdesk@mcpsmd.org).

2. The end-user will log into the UMSAP system using their MCPS Outlook credentials and will be prompted to review the MCPS IGT-RA Guidelines.
3. After inputting their Employee ID Number in the field provided, the end user will need to click, "I Agree".
4. Once access has been granted, the end-user will receive a final confirmation email stating that access has been granted.

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## Modify a Request

When the user needs additional access to the same business system you will **modify** the existing request.

*Note: Creating additional new requests can result in a loss of access.*

Examples of when a user might need additional access include:

- A user needs additional roles in the Hub+.

1. Click **Start a New Request** on the UMSAP homepage.
2. Search for the employee using the search box. Then click **Add**. The employee's information will populate in the section below. Confirm the correct employee has been identified.
3. Click **Start**.
4. Complete all required fields (indicated with an asterisk '\*').
  - **Request Type:** Click **Modify**
  - **Business System:** Using the drop-down menu, select the business system to which the employee requires access. In our example, the employee previously had access to Hub+ and requires additional roles.
  - **Access Form:** Using the drop-down menu, select the form name/number required to complete this request.
  - **Job@Location:** Using the drop-down menu, select the correct position and location for the request.  
*Note: The same job/location used on the initial request should be selected.*
5. Click **Next**.
6. You will now complete the electronic form of the access request.  
*Note: You MUST include the roles/responsibilities to which the employee previously had access.*
7. Complete the new section with relevant information including the **position type** for the access requested. If the position is not listed, check "Position not listed, please enter position title in the following field." Then in the Justification field, include the employee's current position and reason for requesting access.  
*Note: If requesting additional or atypical access, there is an extended approval process.*
8. When the form is complete, click **Next**.
9. Type your employee ID number in the **Authorizing Employee ID** text box, and then click "**I Agree**".

The modified request has now been submitted. Both the requesting official and the employee will receive a confirmation email.

The employee for whom access was requested will receive a confirmation email once access has been granted. The requesting official can check the status of the request by running a report.

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### Add a Requester

A requesting official can delegate duties to other staff members in the UMSAP Portal.

*Note: All access requests initiated by an assigned requester must be approved by the requesting official. Delegating a requester gives that individual the right to submit UMSAP requests ONLY, and does not give them roles on any other business applications.*



1. Click **Assign a Requester** on the UMSAP homepage.
2. Search for the employee you wish to add as a requester in the **Choose requester** box.
3. Click **Add Requester**.
4. The employee's information will populate in the **Current Requesters** section of the page. You and the employee will receive a confirmation email notifying you the employee has been added as a requester.
5. To revoke privileges, in the Current Requesters list, click the **Remove Requester Access** button next to the name of the person.

### Run a Report

The requesting official can run a report to view the status of requests for their staff.

1. On the UMSAP homepage, click on **Reports**.
2. Enter **Filtered By** parameters for the employee, ie., Start and End date range, End User id, Location, and/or Business System for which you wish to view.
3. Click **Search**.
4. If you do not enter search parameters, your user ID is pre-filled as the Requester and you will be able to view all requests that have been submitted by you, and/or on your behalf after clicking **Search**.
5. Click **View Detail** to see a copy of the request that was submitted. The report will open in a new browser tab.

When finished, click the **Logout** button from any page in the UMSAP Portal.

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### Cancel a Request

A requesting official can submit a request to cancel end user access via the UMSAP Reports module.

1. On the UMSAP homepage, click on **Reports**.
2. Enter **Filtered By** parameters for the employee whose access is to be canceled, ie., End User id, Location, and/or Business System.
3. UMSAP pre-fills your ID as the Requester and you will be able to view all requests that have been submitted by you, and/or on your behalf after clicking **Search**.  
*Note: If you are not the original requester for the access to be canceled, delete your ID from the Requester (MELT ID) field.*
4. Select Access Granted from the **Request Status** dropdown menu. Only requests with this status can be canceled.
5. Click **Search**.
6. Click **Cancel Access** in the results row that identifies the access to be canceled.



7. Enter the reason in the **Request to Cancel Access** pop-up window. A reason is required for all cancellation requests.
8. Click **Yes** to confirm and submit the cancellation.

### Recertification

Recertification is processed by administrative and supervisory staff identified as having ownership of a business system, or module of a business system, in which assigned users are required to be recertified twice annually in accordance with MD State and MCPS audit regulations. At the start of each [recertification period](#), you will receive a notification informing you that you may begin your review. Follow the steps below to complete the recertification process:

1. On the UMSAP **Home** page, click on the **Recertification** tab.



2. In the **Filtered By** area, click on the **Business System** drop-down menu for a list of business systems assigned to your business unit for validation. Select a business system from the list.

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The additional filters available are dependent on the selected business system and may include **Environment, Security Class Group, DocuWare Cabinet, Hub+ Department, or UMSAP Role**. Select any of the additional filter values to display the user records to be validated. To filter the records further, either by **Location** or **End User**, enter the value in the appropriate field(s) and click **Search**.

2 records found. 0 record removal requested.

Employee ID	Melt ID	First Name	Last Name	Email	DocuWare Group	UMSAP Role	UMSAP Job Title	Current Location	Current Job Title	Remove Access?	Recertification Completed	Removal Completed	By	Date	Note
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*Note: the total number of user records will be displayed at the top left of the **Recertification Table** and the information fields displayed will vary depending on the business system being reviewed.*

- Use the **Page Size** drop-down to edit the number of records displayed on the screen. The number of records displayed allows you to incrementally manage recertification at the rate desired.

Page Size	10
	10
	20
	50
	100
	All

- As you review records, click on the **View Detail** button to the left of a record to see the corresponding UMSAP access request. A new screen will appear with more details, click the **Close** button to return to the Recertification screen.  
*Note: Only access records that have a corresponding, active, UMSAP Access Request will display the **View Detail** button.*
- Click the **Remove Access?** check-box to identify which user access should be deprovisioned.
- Continue reviewing records until you have completed the list. You will know you have reached the end of the list of records by the page count details shown at the bottom right of the results table.  
*Note: The larger your selected page size, the fewer the number of pages that will be displayed.*
- After all records have been reviewed, click the green **Recertification Review Complete** button, at the top right of the screen. Clicking this button marks the completion of the recertifying process for the business system user group active in the Business System filter.  
*Note: If you have filtered your data set down to a particular user role, security class, location, or specific employee, this action will complete the process for that filtered set of records only.*
- Click **'Yes, mark this review complete.'** in the pop-up window to accept the changes or click **'Cancel'** to reject. Once accepted, you will receive an email notification confirming your actions.

After all business systems have been marked "Recertification Review Complete", any user access that has been marked for Removal will be deprovisioned by DBIS by the end of the recertification period. You may review this progress by clicking on the Recertification Tab to view the completion status of each row.

## Assigning Additional Recertifying Managers

As the Primary Recertifying Manager for your business unit, you can assign all or part of a business system to other administrative and/or supervisory members on your team. The feature allows for collaboration, and oversight, of the ongoing recertification process.

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1. Click on the **Reassign Recertification** button to open the Assign Recertification Manager form.

2. Select the **Business System** the new manager will be assigned to. Then select the next applicable filter to further refine the user records for the new manager's assignment. The available filters are dependent on the selected business system and may include **Environment**, **Security Class Group**, **DocuWare Cabinet**, or **Hub+ Department**.
3. Click on the magnifying glass in the **Manager** field to search for the manager's name or Employee ID and select from the results.
4. Click the **Primary Manager** checkbox only if the newly assigned manager should have the ability to assign additional Recertification Managers.
5. Click **Add** to complete the assignment. Once the assignment is complete, the newly assigned Manager will be able to access the **Recertification** tab in UMSAP to review the user record(s) that they have been assigned.

### User Recertification Period Notifications

Throughout each recertification period, notifications will be sent to inform, and/ or remind all parties involved of important dates and milestones. Below are the details of each notification.

	Message Title	Description
1	Start of User Recertification Period	Received by Primary Recertification Managers at the start of each recertification period (Spring/Fall).
2	Reminder of Closing User Recertification Period	Received by Primary Recertification Managers, and their assigned Secondary Recertification Managers, 5 business days before the period due date.
3	User Recertification Period Due Date has Passed	Received by <i>Primary Recertification Managers</i> , their assigned <i>Secondary Recertification Managers</i> , and the <i>Executive Staff</i> member(s) responsible for the business system in question, who have not completed user recertification by the close of business on the specified due date.
4	Recertification Review Complete confirmation	Received by Primary and Secondary Recertification managers when they click "Recertification Review Complete" for their assigned business system(s).

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5	OSI-DBIS Spring/Fall Recertification period closed	Received by all participants notifying them that the current recertification period (Spring/Fall) has officially closed.
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