Attachment D



Office of Temporary and Disability Assistance

Biennial Employment Plan System (BEPS): District System Administrator

User Manual

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For Training Purposes Only

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Brief Description

This manual provides the District LAN Administrators with instruction on how to add users, edit user details, inactivate users, and update commissioner information for the Biennial Employment Plan System (BEPS) application. Access to the BEPS system in managed in the Flexible Fund for Family Services (FFFS) system.

The Home Screen

The **Home** (Welcome) screen is the first screen to display upon logging into the FFFS system. The screen provides tabs at the top of the screen to navigate to additional screens.

- Access the FFFS system via the intranet at <u>https://fffs.otda.ny.gov</u> or via CentraPort.
- The NY.gov ID Login screen displays. Enter a username and password in the appropriate fields and then click the Sign in button.

Note: Users who are locked out of their account and need support accessing the system should contact the Human-Services-Information Technology Services (HS-ITS) Enterprise Service Desk: (800) 697-1323.

• The **Home** screen displays, tabs appropriate to the user's role located at the top of the screen in the Navigation Bar. These tabs allow users to navigate to additional FFFS screens.

Note: The system displays the full name and the roles assigned to the user.

	Flexible Fund for Family Services	FFFS 1.1.30.1
Home System	Admin Documents	
Welcome District L Role(s) Assigned: D	_ Admin Jistrict System Administrator	
	WELCOME TO THE NEW FFFS SYSTEM! Thank you for participating in the District User Train	ning Session!
		v
	Last Modified:	4/4/2019 11:29:24 AM by Norma MacDonald

Figure 1: Sample FFFS Home screen

Manage District Users

To view District Users, click the **System Admin** tab located in the Navigation Bar and select the **Manage District Users** tab.

			Flexible Fund for Family Services FFFS 1.1.30.1	
Home	System Admin	Reports	Documents	
Wolcome	Manage District	Users		
Role(s) As	Manage Commi	ssioner	inistrator	_
			WELCOME TO THE NEW FFFS SYSTEM!	^
	Th	ank you	for participating in the District User Training Session!	
				~
			Last Modified: 4/4/2019 11:29:24 AM by Norma MacDona	ald

Figure 2: Tab selection from the Navigation Bar

The system displays the **District User** screen. A new user can be added or the details of an existing user can be modified.

District User Status:	ACTIVE V	Search			
			Crea	te New User	ear Filter
▼ Full Name	Email	Phone	▼ Roles	Y Contact Type	▼ Status
Admin, District L.	Test@email.com	(123) 456-7890	District System Administrator		Active
	District User Status: , Y Full Name Admin, District L.	District User Status: ACTIVE T Full Name Email Admin, District L. Test@email.com	District User Status: ACTIVE Search T Full Name Email Phone Admin, District L. Test@email.com (123) 456-7890	District User Status: ACTIVE Search Creat T Full Name Email Phone T Roles Admin, District L. Test@email.com (123) 456-7890 District System Administrator	District User Status: ACTIVE Search Create New User Ct Test@email.com (123) 456-7890 District System Administrator

Figure 3: Sample District User Screen

The list can be filtered using the filter icon available next to the column names. When the filter icon is clicked, a filter pop-up box will display.

- The column can be sorted in ascending or descending order.
- Additional search parameters can be entered in the fields.
- Click the **Apply** button to apply the selected filters.

Click the Clear Filter button on the District User screen to clear any filters applied.

Add New User

To add a new district user, click the **Create New User** button on the **District User** screen. The **Add District User** screen displays.

Add District User									
User Information									
District:*	Select		~						
User ID:*					Status:	Active	Inactive		
First Name:*				MI:			Last Name:*		
Email:*									
Phone:*					Ext:				
Roles:	District S	System Administrator							
	۲	None			BEPS District Submitt	ter			
	0	District Viewer		0	BEPS District User				
	0	District User		0	BEPS District Viewer				
	0	District Submitter		۲	None				
	0	District Reporting							
Contact Type:	🗌 Fiscal	Program							
Notes:									
								Return to List Save	•

Figure 4: Sample Add District User Screen

- The User ID is the NY.gov ID assigned to the user. The field is not case-sensitive.
- Enter the First Name and Last Name of the user, Middle Initial (MI) is optional.
- Enter the email address that the user wants all BEPS emails sent to in the Email field.
- Enter the **Phone** number and extension if any.
- The user must be assigned a role. Select the appropriate role from the list. BEPS roles are in the box to the right (the left box contains FFFS roles).

Role	Permissions
District System Administrator	Add/Edit District user Information Edit Commissioner information
BEPS District Viewer	Read-Only access to all functionalities View Documents uploaded in the system
BEPS District User	All the functionalities of "District Viewer" plus Modify the Plan View Documents uploaded in the system
BEPS District Submitter	All the functionalities of "District User" plus Submit the Plan View Documents uploaded in the system

- Ignore Contact Type, it is for FFFS users.
- Click the **Save** button to create a new user record.

Modify User

To **Modify** a district user, click the **Name** hyperlink under the column **Full Name** on the **District User** screen.

Modify District User User Information							Last Modified: 4	I/17/2019 1:47:12 PM	/ by Sanus Sharma	a Dulal
District:*	Albany									
User ID:*	BEPSuse	r01			Status:	Active	○ Inactive			
First Name:*	John		MI:	X			Last Name:*	Doe		
Email:*	Test@emai	l.com								
Phone:*	(123) 456-7	890			Ext:					
Roles:	District S	ystem Administrator								
	۲	None			0	BEPS Distri	ct Submitter			
	0	District Viewer			۲	BEPS Distri	ct User			
	0	District User			0	BEPS Distri	ct Viewer		1	
	0	District Submitter			0	None			1	
	0	District Reporting							1	
Contact Type: Notes:	Fiscal	☑ Program								
									Return to List	Save

Figure 5: Sample Modify District User Screen

- The user can be inactivated by selecting the status **Inactive**.
- The **User Information** section can be updated as needed.
- Role assignment can be updated by selecting the desired role.
- Click the **Save** button to update the record with changes made.

Manage Commissioner

To view the Commissioner information, click the **System Admin** tab located in the Navigation Bar and select the **Manage Commissioner** tab.

			Flexible Fund for Family Services	FFFS 1.1.30.1	
Home	System Admin	Reports	Documents		
Welcome	Manage District	Users			
Role(s)	Manage Commi	issioner	inistrator		
	WELCOME TO THE NEW FFFS SYSTEM!				
	Thank you for participating in the District User Training Session!				
				~	
	Last Modified: 4/4/2019 11:29:24 AM by Norma MacDonald				

Figure 6: Tab selection from the Navigation Bar

The system displays the **District Commissioner** screen. The details of the Commissioner can be modified from this screen.

District Commissioner							
Commissioner Info							
Note: Commissioner designation	Note: Commissioner designation requires user role assignment for system access						
Current Commissioner				Last Modified:	8/3/2018 10:24:32 AM by Norma MacDonald		
District:*	Albany						
Title:*	Acting Commissioner						
First Name:*	Albany	MI:		Last Name:*	Commissioner		
Email:*	albanycommish@albany.com						
Phone:*	(555) 555-1212		Ext:				
					Cancel Changes Save		

Figure 7: Sample District Commissioner Screen

- The **Title** for the Commissioner must be kept up to date. The title entered here will be used to prepopulate the title on certification screen.
- All FFFS related emails, with the Commissioner as a recipient, will be sent to the email provided in the **Email** field.
- Click the **Save** button to update the Commissioner info with the changes made.

Note: Entering information in this screen does not grant the Commissioner access to the system. Commissioner designation is separate from user role assignment for system access.

Entitlements

Users must be granted entitlement to BEPS. BEPS entitlements are managed through the Delegated Administration site.

Log in to the **Delegated Administration** site.

🥖 Delegated Administration - Internet Explorer						
🔄 💽 🗢 🖪 https://da.its.ny.gov/da/login.jsp	🔎 🔄 🔄 💶 Delegated Administration 🛛 🗙 📃					
🗙 📆 Convert 🔻 🗃 Select 🛛 File Edit View Favorites Tools	Help					
NY.gov ID Delegated Adminis	tration					
Login to your User ID : Password :	Delegated Administration Account WR9271-DA Submit					
<u>About ITS Privacy Policy Contact ITS </u> Version 2.5.04, Build Date	opyright © 2020 - New York State Office of Information Technology S and Time: 6/9/2020 4-27 PM Web: 163P App: 169PB_1					

Figure 8: Delegated Administration site

Search for the user that needs entitlement to BEPS.

Update Entitleme	ents	
Please enter your <u>Advanced Search</u> . additional limiting characters, may be	search criteria according Searches returning too many criteria. A wildcard charact used on any text field.	to the following or perform an y matches will require the entry of ter (*), following a minimum of 3
User ID :	Last Name : Submit	NYS DMV Client ID :

Figure 9: Search User Screen

Grant the user entitlement to the Flexible Find for Family Services/Biennial Employment Plans application.

U	Update Entitlements : WR9271				
Pl M	Please select the attribute values you want this user to possess. Multi-value attribute selection is valid on the list box.				
	Application	Attribute			
	Flexible Fund For Family Services / Biennial Employment Plans	Flexible Fund For Family Services / Biennial Employment Plans			
		Submit			

Figure 10: Update Entitlements Screen