

This job aid includes information for agency security officers using the FNS tools menu.

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Security Officer Administration

Agency security officers use the tools menu to manage user account information. For example, you can create new user accounts, add/remove roles, update user information, and maintain location/division information.

✓ Agency users are also referred to as ‘customers’ in FNS. For example, the security officer administration page includes the ability to search for customer information.

- Select:** Security Officer Administration.
→ FNS will display the customer search page.



In this example, the security officer administration page is displayed.

Security Officer Administration - Customer Search

First Name	<input type="text"/>	Last Name	<input type="text"/>	<input checked="" type="checkbox"/> Active Accounts	<input checked="" type="checkbox"/> Pin Criteria Open
Agency	123 Sample Agency			<input type="checkbox"/> Expired Accounts	<input type="button" value="Search"/>
Division	<input type="text" value=""/>			<input type="checkbox"/> Show User ID	
<input type="button" value="Roles"/>		<input type="button" value="Locations"/>		<input type="button" value="Divisions"/>	
		<input type="button" value="New Account"/>		<input type="button" value="Clear Criteria"/>	

Search Tools

Use the search option to quickly find information. For example, you can search for a list of all users in your agency or input specific search criteria to narrow the list of results.

- Select:** Search.
→ FNS will display a list of users for your agency.



In this example, the search criteria is available with the search results because the checkbox is checked for ‘pin criteria open’.

✓ If you want search results only, uncheck the checkbox for ‘pin criteria open’.

First Name	<input type="text" value="Sample"/>	Last Name	<input type="text" value="Sample"/>	<input checked="" type="checkbox"/> Active Accounts	<input checked="" type="checkbox"/> Pin Criteria Open
Agency	123 Sample Agency			<input checked="" type="checkbox"/> Expired Accounts	<input type="button" value="Search"/>
Division	<input type="text" value="Sample"/>			<input checked="" type="checkbox"/> Show User ID	
<input type="button" value="Roles"/>		<input type="button" value="Locations"/>		<input type="button" value="Divisions"/>	
		<input type="button" value="New Account"/>		<input type="button" value="Clear Criteria"/>	

Search Results (1 found)

First Name	Last Name	Agency Division	Authorized User ID	Phone Number
Sample	Sample	Sample	Sample	Sample

New Account (New User ID)

Use the tools menu with security officer administration options to create a new user account.

1. Select: New Account.

→ FNS will display the customer account page.

New Account

2. Input: Name. This is the name of the new user.

Customer Name* (First, Middle, Last)

3. Input: Employment mailing address.

→ Use the dropdown to select an existing location then select 'use this location' and FNS will auto-fill the address for you.

Employment Mailing address*

 City* State * Zip *

Or use this location

Use this location

4. Input: Mailstop.

Mail Stop *

5. Input: Phone Number.

Phone Number *

6. Input: Fax Number.

Fax Number

7. Input: Email Address.

Email Address *

8. Select: Checkbox next to account expires only if this is a temporary account.

→ If this is a temporary account, select an expiration date and reason for expiration.

In this example, we do not want to expire the account.

✓ Low visual acuity is currently not used for FNS users.

Low Visual Acuity

Account Expires

Reason for expiration

9. Select: Agency Division.

Employing Agency * 123 Sample Agency

Agency Division *

10. Input: Customer ID. This is the user ID to log in to FNS.

→ Most agencies use a minimum of 8 characters and maximum of 13 characters for the customer ID.

Customer ID *

OR

Propose Customer ID

→ Use the propose customer ID option if you want FNS to suggest a unique customer ID for the user.

11. Select: Save.

→ Remember to add roles for the user after you save their new account.

Save

→ FNS will send an email to the new user with instructions to change their password using the log in page.

User Roles and Security/Permissions

Agency data is secured by user roles with security/permission levels. This helps to ensure agencies control and manage their information.

1. Select: Roles.

→ FNS will display a list of user names (agency customers).

Roles

2. Select: User.

→ FNS will display a list of roles.

Agency Customers

Sample, Name

3. Select: Checkbox next to roles you want to add.

→ You can also uncheck the checkbox next to roles you want to remove.

In this example, we select the roles needed for an agency user who will create, delete, approve, and release fiscal notes.

Existing Roles

- Agency Security Officer
- Prior Agency Access
- Fiscal Note Approver
- Assigned Agency Override
- Fiscal Note Releaser
- Fiscal Note Author
- Extractor
- Delete FN
- XML Upload
- Read Only

4. Select: Save.

Save

Role	Additional Information
Agency Security Officer	✓ Manages user account information and roles/permissions. ✓ Manages agency account information for locations, divisions, and contacts.
Prior Agency Access	✓ Restricted access (exception only). Used by some agencies for access to information from a previous agency.
Fiscal Note Approver	✓ Approve fiscal notes for the agency.
Assigned Agency Override	✓ Restricted access (exception only). Used by some agencies for access to override assigned agency.
Fiscal Note Releaser	✓ Release agency approved fiscal notes to OFM.
Fiscal Note Author	✓ Create and edit fiscal notes for the agency.
Extractor	✓ Restricted access (exception only). Used by some agencies to extract data from FNS.
Delete FN	✓ Delete fiscal note if it is not released.
XML Upload	✓ Restricted access (exception only). Used by some agencies to transfer fiscal notes electronically (upload fiscal notes from agency system to FNS).
Read Only	✓ Display fiscal notes and status (can view information only).

Expire User Account

Use the customer search option to find an agency user and expire their account. For example, you cannot delete a user so you will expire the account if the user transfers to a different agency.

1. **Select:** Search.

First Name Last Name Active Accounts Pin Criteria Open
 Agency 123 Sample Agency Expired Accounts
 Division Show User ID

2. **Select:** User.

→ FNS will display the customer account page with information about the user.

Search Results

First Name	Last Name	Agency Division
Sample	Sample	Sample

3. **Select:** Checkbox next to account expires.

Account Expires

4. **Select:** Date. This is the effective date for the account expiration.

Account Expires Reason for expiration

5. **Select:** Reason for expiration.

→ To activate an expired account, uncheck the checkbox next to account expires and remove the reason for expiration.

6. **Select:** Save.

Reset User Password

Use the customer search option to find an agency user and reset their password.

✓ Password reset options are also available for users on the FNS log in page. For example, a user can select the 'forgot password' link on the FNS log in page to reset their own password.

1. **Select:** Search.

First Name Last Name Active Accounts Pin Criteria Open
 Agency 123 Sample Agency Expired Accounts
 Division Show User ID

2. **Select:** User.

→ FNS will display the customer account page with information about the user.

Search Results

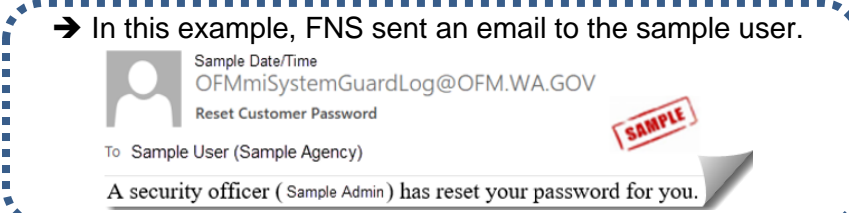
First Name	Last Name	Agency Division
Sample	Sample	Sample

3. **Select:** Reset Password.

→ The reset password option is currently located near the bottom of the customer account page.

→ FNS will send an email to the user with instructions to change their password using the log in page. If the user does not receive an email, verify their email address on the customer account page.

→ In this example, FNS sent an email to the sample user.



Sample Date/Time
OFMmiSystemGuardLog@OFM.WA.GOV
Reset Customer Password
To: Sample User (Sample Agency)
A security officer (Sample Admin) has reset your password for you.

Locations

Agency security officers can create new locations and manage location information for their agency.

1. **Select:** Locations.

Locations

2. **Select:** Existing Location
-- Or --
Select: New.

→ FNS will display the security officer administration – location management page.

Security Officer Administration - Location Management

Existing Locations

3. **Input:** Location information.
4. **Select:** Save.

Location Name *

Address *

City State Zip

Mail Stop

Special Procedures

Location Local Phone Number *

Location Contact

* Required

Divisions

Agency security officers can create new divisions and manage division information for their agency.

1. **Select:** Divisions.

Divisions

2. **Select:** Existing Division.
-- Or --
Select: New.

→ FNS will display the security officer administration – division management page.

Security Officer Administration - Division Management

Agency
123 Sample Agency

Existing Divisions

3. **Input:** Division Title.
4. **Select:** Save.

Division Title

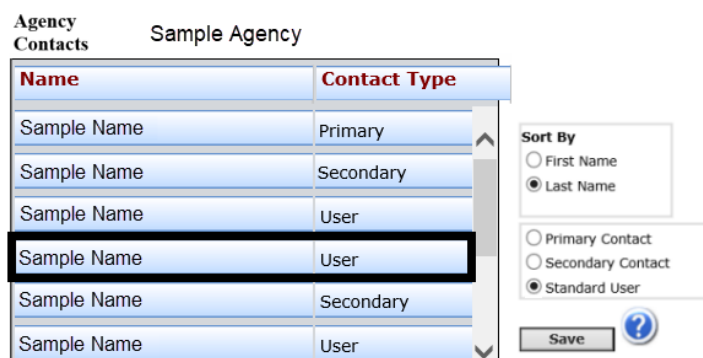
Agency Contacts Management

Agency security officers use the tools menu to manage agency contacts information. For example, you can designate a user as a primary contact or secondary contact for your agency and FNS will use that information with the automated email notification for fiscal notes.

- 1. Select:** Agency Contacts Management.
→ FNS will display a list of agency contacts. These are your FNS agency users.

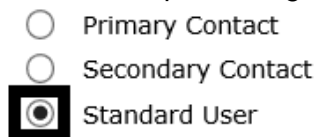


- 2. Select:** Agency contact.
→ You can only update one agency contact at a time. For example, select one agency contact only (not multiple). If you need to update multiple contacts, follow the steps for each contact.



- 3. Select:** Designation.
→ FNS uses the agency contact designation for automated email notification.

In this example, the agency contact will be a standard user.



- 4. Select:** Save.



Designation	FNS Automated Email Notification for Fiscal Notes
Primary Contact	✓ Automated email notifications are sent to primary contacts.
Secondary Contact	✓ Automated email notifications are sent to secondary contacts as 'cc' (copy).
Standard User	✓ Not applicable (automated email notifications are not sent for fiscal notes).

Additional Information – Help Desk

For additional information about Fiscal Notes System contact the OFM Help Desk.



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