** Security User Permissions Instructions**

Please read the following instructions before completing the **SHARE Security User Permission form** for **HCM** or **Financials**.

The **SHARE Security User Permission** **Form** is required for the following:

* To assign security roles and request user ID’s and passwords for new users.
* To add security roles to existing user profiles.
* To remove security roles from existing users.
* To modify authorized workflow approvals.

**How to fill out the SHARE Security User Permission Form**

Any text in BLUE represents a field that is editable. These fields may be data entry fields or drop down boxes with a list of options. Fields labeled as Select are drop down boxes with limited options and fields labeled as Click here to enter text are text fields where you enter data.

Any text in RED are instructions to you to assist you in filling out the form. It is important to pay attention to the RED text.

It is **REQUIRED** that you fill out the following fields:

* Agency Name
* Business Unit
* Submitted By
* Employee Name
* SHARE Employee ID
* Employee E-Mail
* Employee Phone
* Effective Date
* Employee Status
* Employee Position Type

Once you have provided the above information, you will select which roles the user needs **Added** or **Deleted** by clicking on the **Select** text. This will give you a drop down box with the options of Add, Delete, or Select.

**PLEASE NOTE:** **Select** is a default value. If you want to add a role, you must change this to **Add**. If you want to delete a role, you must select **Delete**. A value of **Select** means that we will not change the security relating to the user for that role.

**Roles that Require Training (to be determined post Go Live)**

Some roles require that training is completed before they can be assigned. These roles are marked on the form with a **[REQUIRES TRAINING]** tag. Training for these roles is provided on a regular basis. More information can be found at this link: <http://share.state.nm.us/training.html>

If a role that requires training is selected, you must submit proof of the users training completion along with the SHARE Security User Permission Form upon submission.

**Security User Permissions Instructions **

**View Only Roles**

Some roles only allow a user to view information instead of update/change/add/remove information, and they are marked with a ***View Only*** tag in their descriptions. Roles without this tag are able to view and update information relating to that role.

**Agency Human Resources Authorization**

This form must be signed by an appropriate officer within your agency. For the HCM form, the signature must be signed by a human resources agency director or officer.

**Non-HR Personnel Roles**

Roles on this form that are designated as “Non-HR” are for employees working in other non-human resources job functions that still require access to HCM to perform their jobs. These roles cannot be assigned to HR personnel. Conversely, a Non-HR employee cannot be assigned a role unless it is designated as “Non-HR”. Assignment of Non-HR access requires both an HR department head signature and CFO initials.

**Privacy Statement**

Employees granted access to HCM will be given access to view sensitive and personal identifying information. Employees are expected to treat this information securely and not to abuse this access or disclose any information to other employees or non-state personnel.

** HCM Security User Permission Form**

**If a requested Role is added that denotes [REQUIRES TRAINING], please attach a copy of certificate of completion to the security form.**

**Agency Name:** Click here to enter text. **Employee Name:** Click here to enter text. **Employee E-Mail:** Click here to enter text.

**Business Unit:** Click here to enter text. **SHARE Emp. ID:** Click here to enter text. **Employee Phone:** Click here to enter text.

**Submitted By:** Click here to enter text. **Effective Date:** Click here to enter text.

**Employee Status:** Select

**Employee Position Type:** Select

|  |
| --- |
| Click here to enter text. |

**Require access to multiple Business Units?**

**(LIST THEM IN THE BOX TO THE RIGHT.)**

**Human Resources Access**

**FOR HR PERSONNEL ONLY. Please choose “ADD/DELETE” from the** Select **dropdown boxes next to each role requested for this user.**

**Time and Labor Roles (SELECT ALL THAT APPLY) Description**

|  |  |  |
| --- | --- | --- |
| Select | TL Agency Time Admin | *Manage Time and Labor, approve time, and enroll Time Reporters* |
| TL Time Approver | *Time entry and approval for groups of employees* |
| TL Time Keeper | *Time entry on behalf of others* |
| Select | TL Task Profile ID | *Task Profile maintenance (labor distribution)* |
| Select | TL DOT Combo Code | ***(DOT Only)*** *DOT Create Combination Codes Process* |
| Select | TL View Only | ***View Only*** *all Time and Labor* |
| Select | TL Setup View | ***View Only*** *View Time and Labor setup information* |

**Payroll Roles (SELECT ONE OR LEAVE BLANK) Description**

|  |  |  |
| --- | --- | --- |
| Select | Payroll Update | *Update employees’ payroll information* |
| Payroll View Only | ***View Only*** *employees’ payroll information* |

**Benefits Roles (SELECT ONE OR LEAVE BLANK) Description**

|  |  |  |
| --- | --- | --- |
| Select | Benefits View Only | ***View Only*** *Agency employee benefits data* |

**Human Resources Roles (SELECT ONE OR LEAVE BLANK) Description**

|  |  |  |
| --- | --- | --- |
| Select | HR Admin Update | *Update Personal and Job data by agency* |
| HR Job View | ***View Only*** *Job data by agency* |
| HR Admin View Only | ***View Only*** *Personal and Job data by agency* |

**Additional Roles (SELECT ONE OR LEAVE BLANK) Description**

|  |  |  |
| --- | --- | --- |
| Select | Query Viewer | ***(HR Staff Only)*** *View / Run general existing queries only* |
| Select | DOT Reports | ***(DOT Only)*** *HR Info for Federal Highway Billing* |

**Non-HR Access**

**FOR Non-HR PERSONNEL ONLY. Please choose “ADD/DELETE” from the** Select **dropdown boxes next to each role requested for this user.**

**Non-HR Roles (SELECT ONE OR LEAVE BLANK) Description**

|  |  |  |
| --- | --- | --- |
| Select | Non-HR Job View | ***View Only*** *View HR job data* |
| Non-HR HCM View | ***View Only*** *View HR information* |
| Select | Non-HR TL Task Profile ID  | *Task Profile maintenance (labor distribution)* |
| Select | Non-HR Query Viewer | ***View Only*** *View/Run general existing queries only* |

**CFO signed initials required for Non-HR personnel requests. CFO Signature not required for HR personnel.**

**CFO Authorization: \_\_\_\_\_\_\_**

**Agency HR Manager Authorization**

**Print Name: Signature: Date:**

**Please note some roles have controlled access. Submission of this form does not guarantee access will be given. Requests missing an appropriate signature or proof of training certificate for required roles will not be accepted.**

**HCM Security Roles Detailed Descriptions**

The ensuing table contains a more detailed description of each Role in the Security User Permission Form. Each **Role Name** is matched to the name in the form and the superscript number [Ex. – Benefits Analyst **(1)**] corresponds to the **Role ID#** column in the table.

|  |  |  |
| --- | --- | --- |
| **Role Name** | **Description** | **Requirements** |
| TL Agency Time Admin |  **Access:** Auto Enrollment, NMS Terminal Leave Report, Payable Status, Rapid Time, Scheduled Hours, Start Page, View EE Schedule, Preferences, Reporting Locations, Workforce Availability, Approve Time by Group, Compensatory Time, Create Time, Reporter Data, Daily Time Calendar, Employee Search Options, Leave and Compensatory Time, Manage Exception, Manage Schedules, Manager Selector, Monthly Time Calendar, My Team, My Team Navigation Bar, Payable Time Detail, Payable Time Summary, Person Selector, Report Manager, Report Time, Reported Time Audit, Team Time, Time Reporter Status, Time Reporters in Groups, Timesheet, Weekly Time Calendar, Comp Plan Enrollment, Manage Group Exceptions, View Time, Reporter Comp Plans, Assign Work Schedule, Maintain Time Reporter Data, Assign Work Schedule**Role Security Name:** NMX\_TL\_AGY\_TIME\_ADMIN |  |
| TL Task Profile ID | **Access:**  Combination Code Table, Task Profile, Task group, Department Budget Table USA**Role Security Name:** NMX\_TL\_TASK\_PROFILE\_ID |  |
| TL DOT Combo Code **(DOT ONLY)** | **Access:** NMS Create Combo Code, NMS Payroll Expend Report, NMDOT Payroll Summary Report, Report Manager, NMS Combo Code - ERN Code Map**Role Security Name:** NMX\_TL\_DOT\_COMBO | DOT ONLY  |
| TL Time Approver | **Access:**  Auto Enrollment, Payable Status, Rapid Time, Scheduled Hours, Start Page, View EE Schedule Preferences, Reporting, Locations, Workforce Availability, Approve Time by Group, Compensatory Time, Daily Time Calendar, Employee Search, Options, Leave and Compensatory Time, Manage Exception, Manage Schedules, Manager Selector, Monthly Time Calendar, My Team, My Team Navigation Bar, Payable Time Detail, Payable Time Summary, Person Selector, Report Manager, Report Time, Team Time, Timesheet, Weekly Time Calendar, Comp Plan Enrollment, Manage Group Exceptions, View Time Reporter Comp Plans, Assign Work Schedule, Maintain Time Reporter Data**Role Security Name:** NMX\_TL\_TIME\_APPROVER |  |
| TL Time Keeper | **Access:**  Payable Status, Scheduled Hours, View EE Schedule Preferences, Approve Time by Group, Compensatory Time, Daily Time, Calendar, Employee Search Options, Manage Schedules, Monthly Time Calendar, Payable Time Detail, Payable Time Summary, Report Manager, Report Time, Timesheet, Weekly Time Calendar, Comp Plan Enrollment, Manage Group Exceptions, View Time Reporter Comp Plans, Assign Work Schedule, Maintain Time Reporter Data**Role Security Name:** NMX\_TL\_TIME\_KEEPER  |  |

|  |  |  |
| --- | --- | --- |
| **Role Name** | **Description** | **Requirements** |
| TL View Only | **Access:**  Payable Status, Scheduled Hours, View EE Schedule Preferences, Approve Time by Group, Compensatory Time, Daily Time Calendar, Employee Search Options, Manage Schedules, Monthly Time Calendar, Payable Time Detail, Payable Time Summary, Report Manager, Report Time, Timesheet, Weekly Time Calendar, Comp Plan Enrollment, Manage Group Exceptions, View Time Reporter Comp Plans, Assign Work Schedule, Maintain Time Reporter Data**Role Security Name:** NMX\_TL\_VIEW |  |
| TL Setup View | **Access:** Application Suites, Configure Tab, Configure Tab Application, Refresh Dynamic Group(s), Static Group, Schedules to be Validated, AE Section Definition, Actions, Alert Criteria, Alert Routings, Application Items, Assign Schedule to Group, Build Time Period Calendar, Business Unit PF, Calendar View Options, Chart Field Common Component, Complex, Conditions, Configure Tab Page, Create Time Reporter Data, Daily, Dynamic Group, FS Activity, Group Creation Security, Manage Tab Application, Monthly, Override Reason Code, Overtime Limit, Pay System, Publish Schedule Preference, Rapid Time TemplateRepeating, Report Manager, Rule Template Definition, Rules, Rules Export, Rules Import, Rules Recompile, SQL Objects, Schedule Group, TCD Supervisor, TL Permission List Security, TL: General Settings, TL: Time Admin Options, TRC Category, Task Template, Template-Built Rules, Time Reporting Template, Unit of Measure, Validation Definition, Validation Set, Definition, View Calendar Time Spans, View Time Period Calendar, Weekly, Working Tables, Comp Plan Enrollment, Copy TRC, Program, View Time Reporter Comp Plans, Activity ID, Ad Hoc Definition, Alert Program, Assign Work Schedule, Attendance, Programs, Compensatory Time Off Plan, Customer, Definitions, Exception Definition, Maintain Time Reporter Data, Product, Project, Relationship Definitions, Rule Element 1, Rule Element 2, Rule Element 3, Rule Element 4, Rule Element 5, Rule Programs, Schedule Assignment Group, Shifts, TCD Group, TCD Restriction Profile, TCD Setup, TCD Type Definition, TRC Program, Task, Task Profile, Task group, Time Reporting Codes (TRC), User Field 1, User Field 2, User Field 3, User Field 4, User Field 5, Value List, Workdays, Workgroup**Role Security Name:** NMX\_TL\_SETUP\_VW |  |
| Payroll Update | **Access:**  Employee Earnings Snapshot Report, NMS Leave Liability Report, NMS Terminal Leave Report, NMS Agency Deduction Register, NMS Agency Other Earn Register, NMS Agency Payroll Register, NMS Agency Payroll Summary, Arrears, Check Year-to-Date, Deductions, Earnings, Garnishments, Query Viewer, Report Manager, Review Actuals Distribution, Review FLSA Pay Data, Review Paycheck, Review Paycheck Summary, Review Self Service Paycheck, Taxes, Create Garnishments, Create General Deductions, Request Direct Deposit, Update Employee Tax Data, Update Payroll Options, Update Tax Distribution**Role Security Name:** NMX\_PR\_UPDATE |  |
| Payroll View Only | **Access:** Employee Earnings Snapshot Report, NMS Leave Liability Report, NMS Terminal Leave Report, NMS Agency Deduction Register, NMS Agency Other Earn Register, NMS Agency Payroll Register, NMS Agency Payroll Summary, Arrears, Check Year-to-Date, Deductions, Earnings, Garnishments, Query Viewer, Report Manager, Review Actuals Distribution, Review FLSA Pay Data, Review Paycheck, Review Paycheck Summary, Review Self Service Paycheck, Taxes**Role Security Name:** NMX\_PR\_VIEW |   |

|  |  |  |
| --- | --- | --- |
| **Role Name** | **Description** | **Requirements** |
| Benefits View Only | **Access:**  Current Benefits Summary, Review Accrual Balances, Review Dep/Ben Summary, Assign to Benefit Program, Disability Benefits, FSA Benefits, Health Benefits, Leave Plans, Life and AD/D Benefits, Retirement Plans, Update Dependent/Beneficiary**Role Security Name:** NMX\_BN\_VIEW |  |
| HR Admin Update | **Access:**  Above Maximum Analysis, Active Position History, Active/Inactive Positions, Add Employee Instance(hidden), Add a Person, Approvals Audit Report, Below Minimum Analysis, Birthdays Report, Citizenship/Country/Visa Audit, Criteria, Define Field Mappings, Define Form Definitions, Define Form Layouts, Emergency Contacts Report, Employee Compensation Changes, Employees on Leave of Absence, Generic Template, Home Address Report, Incumbent History, License/Certificate Renewal, Maintain User Lists, NEM Event Setup, NEM Setup, NMS Governor's Exempt Employee, NMS NEOGOV Extract Data, NMS Organizational Listing Report, NMS Position Report E-1 Form, NMS Vacant Budgeted Position by Agency, Passport/Visa Expiration Audit, Personnel Actions History, Position Status, Register Transactions, Salary Grade, Salary Grade/Step, Salary History by Department, Salary History by Employee, Salary Structure, Temporary Employees, Vacant Position, Workflow Transactions, Years of Service, NMS Position Change Request, Personal Information, Approval Authorization, NMS Benefit History Data, NMS Payroll History Data, NMS Personnel History Data, NMS Position History Data, Personal Data, Setup Process Definitions, Marital Status Changes, NMS Statewide Employee Search, Name Changes, Admin Monitor View History, Administration Monitor, Approval Monitor Configuration, Archive Viewer, Configure Transactions, Driver's License Data, Emergency Contact, General Comments, Multiple Jobs Summary, NEM Status, NMS Position Change History, Person Organizational Summary, Position History, Preview Monitor, Prior Work Experience, Query Viewer, Redirect, Report Manager, SS Framework Common Page, Salary Structure Summary, Vacant Budgeted Positions, Volunteer Activities, Worklist, Worklist Details, Badge/Clearance Access Summary, Employee Compensation History, Position Summary, Workforce Job Summary, Add/Update Position Info, Additional Names, Badge, Disabilities, Identification Data, Job Data, NMS Business Unit Contact, NMS Performance Review Entry**Role Security Name:** NMX\_HR\_ADMIN\_UPDATE |   |
| HR Job View | **Access:** Job info, Location**Role Security Name:** NMX\_HR\_JOB\_VIEW |  |
| **Role Name** | **Description** | **Requirements** |
| HR Admin View Only | **Access:** Above Maximum Analysis, Active Position History, Active/Inactive Positions, Below Minimum Analysis, Birthdays Report, Citizenship/Country/Visa Audit, Emergency Contacts Report, Employee Compensation Changes, Employees on Leave of Absence, Home Address Report, Incumbent History, License/Certificate Renewal, NMS Governor's Exempt Employee, NMS NEOGOV Extract Data, NMS Organizational Listing Report, NMS Position Report E-1 Form, NMS Vacant Budgeted Position by Agency, Passport/Visa Expiration Audit, Personnel Actions History, Position Status, Salary Grade, Salary Grade/Step, Salary History by Department, Salary History by Employee, Salary Structure, Temporary Employees, Vacant Position, Years of Service, NMS Benefit History Data, NMS Payroll History Data, NMS Personnel History Data, NMS Position History Data, Personal Data, NMS Statewide Employee Search, Driver's License Data, Emergency Contact, General Comments, Multiple Jobs Summary, NMS Position Change History, NMS Position Change Request, Person Organizational Summary, Position History, Prior Work Experience, Query Viewer, Report Manager, Salary Structure Summary, Vacant Budgeted Positions, Volunteer Activities, Badge/Clearance Access Summary, Employee Compensation History, Position Summary, Add/Update Position Info, Additional Names, Badge, Disabilities, Identification Data, Job Data, NMS Performance Review Entry, Personal Information**Role Security Name:** NMX\_ADMIN\_VIEW |   |
| Query Viewer  | **Access:** Query Viewer**Role Security Name:** NMX\_QV\_GENERAL    |   |
| DOT Reports **(DOT ONLY)** | **Access:** HR Info for Federal Highway Billing**Role Security Name:** NMX\_DOT\_REPORTS |  |
| Non-HR Job View | **Access:** Workforce Administration, Job Data**Role Security Name:** NMX\_HR\_JOB\_VIEW |  |
| Non-HR HCM View | **Access:** Job Data, Add/Update Position Info, Maintain Time Reporter Data, NMS Leave Liability Report, Task Profile, Task group, Combination Code Table, Department Budget Table USA**Role Security Name:** NMX\_HCM\_NON\_HR\_VIEW​ |  |
| Non-HR Query Viewer  | **Access:** Query Viewer**Role Security Name:** NMX\_QV\_NON\_HR |   |
| Non-HR TL Task Profile ID | **Access:**  Combination Code Table, Task Profile, Task group, Department Budget Table USA**Role Security Name:** NMX\_TL\_TASK\_PROFILE\_ID |  |