

Creating an Online Budget Management Cloud Account

The [Cloud Admin tool](#) (available to Cloud Admin-level users on <https://www.senior-anywhere.com>) gives you the ability to manage your school's Cloud accounts from a single, centralized location. If you ever need to deactivate a user account, you can do so using the Cloud Admin tool. This removes the user's ability to access any school resources, while at the same time leaving all audit information tracking the user's activities intact.

Using Online Budget Management gives you the flexibility to log into a web app, without connecting through Citrix. However it is important that all OBM users, even those who do not plan to access any other applications, use a Cloud Account to log into OBM. This allows better, more secure account management tools for the administrator(s) at your school when it comes to credential- and access-management.

Creating a Budget Management Cloud Account is a two-part process, between the Admin User and the End User. The Admin User creates the Cloud Account for the End User in Senior-Anywhere with the Cloud Admin tool, and then associates the Cloud Account with a database user, as described by [How To Set Up User Accounts](#). The End User then logs into the Senior-Anywhere website with the temporary password received via email (sent automatically upon account creation) to set their password. Once the End User creates a unique password, they can log into Online Budget Management.

It is important to note that once the OBM user sets his or her password, there is no need for the user to log into Senior-Anywhere again, other than password management. The user can bookmark your school's Online Budget Management site. The user does not need to download and install the Citrix Receiver unless he or she will be working in additional Advantage apps.

Setting up an Online Budget Management Cloud Account (Admin):

1. Log into the Senior-Anywhere website (<https://www.senior-anywhere.com>) as a CloudAdmin user.
2. Open the Cloud Admin tool and click **Add**  Add to create a Cloud Account for the End User. Enter the necessary information for the End User in the Create New User window. Click **OK**. The End User receives an email containing a temporary password.



Create New User

User account details:

User Name (Required)

First Name (Required)

Last Name (Required)

Phone (Optional)

Email Address (Required)

Account Security:

User Role (Optional)

* Passwords are auto generated and emailed to the user

** User account must be assigned to a Senior Systems database account using the alternate/ID field in the Systems Admin module.

3. Log into the System Administration application as the database owner.
4. Click **File > User Maintenance > Creating a New User Account**. Enter a **User Name**, a **Domain/Alt ID** and click the **Allow LDAP login for this user** checkbox. The **Domain/Alt ID** field must match the username entered for the Cloud Account username (for instance, in this example we are using "X3.TestTest"). Click **OK**.



Create New User

User Information

User Name

Domain/Alt ID

Authentication

Allow LDAP login for this user

Allow Single sign-on for this user

Password (30 chars. max.)

Retype Password

Full Name

Job Title

Account Valid Dates

From To

Leave Dates Blank for Unlimited Access

Password Security

Last Changed On

Next Scheduled Change

Force Change By

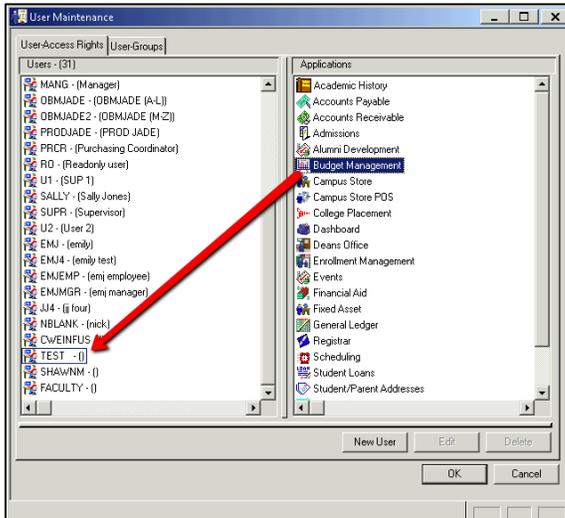
Revalidate Password on Next Login

Failed Logins

Lock Account

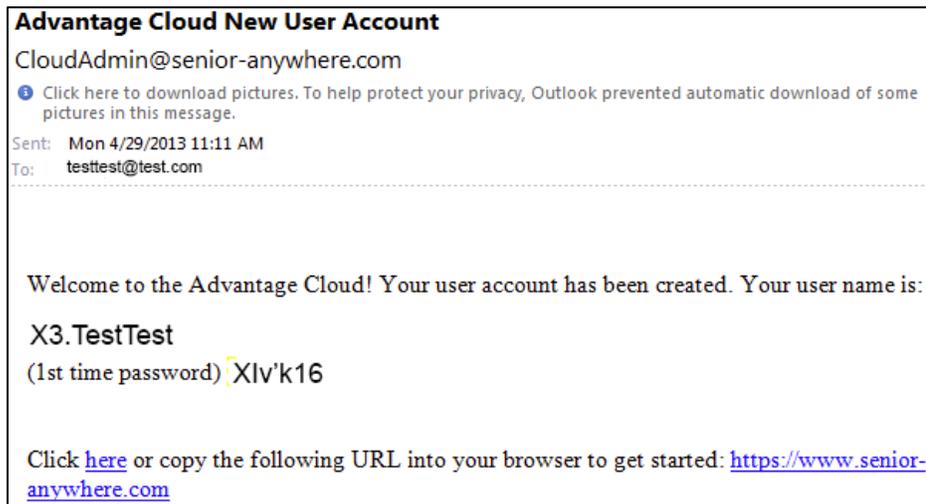
5. On the User Maintenance screen, drag the **Budget Management** security over to the new user that you just created. Click **OK**. Alternatively, use User Groups to give users the appropriate level of permissions.

Note: If the only application that this user will need access to is Budget Management, then only give them the Budget Management security here.

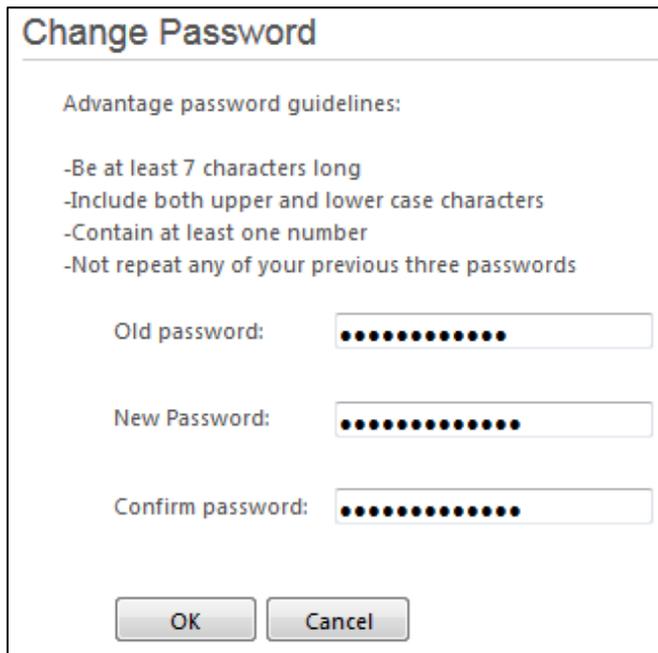


Setting up an Online Budget Management Cloud Account (End User):

1. Log into the Senior-Anywhere website (<https://www.senior-anywhere.com>) with the temporary password that you received via email.



2. Enter your temporary password in the **Old password** field, and enter your new password in the **New Password** field. Click **OK**.



Change Password

Advantage password guidelines:

- Be at least 7 characters long
- Include both upper and lower case characters
- Contain at least one number
- Not repeat any of your previous three passwords

Old password:

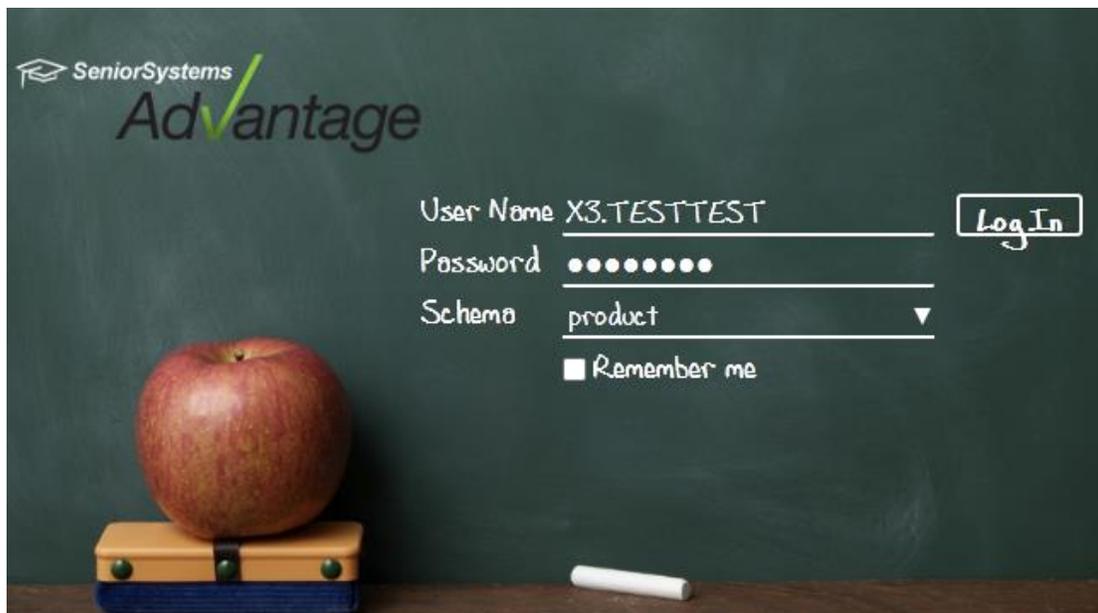
New Password:

Confirm password:

3. Once you have logged into the Senior-Anywhere website (<https://www.senior-anywhere.com>), click the **Content** tab and click the link to the Online Budget Management website.

Note: After clicking this link, you can make a Bookmark to this link in your web browser so that you do not have to log into the Senior-Anywhere website each time you want to access the Budget Management application.

4. Log into the Online Budget Management website with the same user name and password that you used to log into the Senior-Anywhere website. For example, below we are using the X3.TESTTEST user name. Once you have logged into the Online Budget Management website, you have successfully created a Budget Management Cloud Account.



5. Now the individual's Advantage Database Account and Cloud Account are linked. The user should now use his or her Cloud credentials to log into <https://www.Senior-Anywhere.com>, Advantage applications and My BackPack.