

# **RMM\_User\_Guide**

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# RMM User Guide

## Getting Started

Role Matrix Manager (RMM) is an online software utility designed to allow a select group of Disney users – i.e., “Role Matrix Managers” – to perform the following functions in WDI’s Project Management Controls System (aka PMCS, NexGEN and Merlin):

- Request New or Modify Existing PMCS/NexGEN User Accounts
- Generate Comprehensive PMCS/NexGEN User Reports for auditing, etc.
- WBS/CBS mapping (addressed in a separate document)



The RMM should be accessed only when using Internet Explorer as your web browser.



The "ADD NEW RESOURCE" button will be available only when an attempt to search for a resource has been made.



In the case where only a modification is requested to an existing User’s profile, a single e-mail notification will be sent to the Requestor ONLY.



In case a User's account should be closed and the User deactivated from all projects, be sure to include a comment in the "Special Instructions" box (for example: "User no longer with WDI, close account").



If you have any questions/comments, please contact the WDI-PMCS/NexGEN Support Team at [WDI.NexGEN@Disney.com](mailto:WDI.NexGEN@Disney.com)

### Step 1: Log into RMM

- A. Open Internet Explorer.
- B. Go to: <http://pmcs.wdi.disney.com/rmm/signin.aspx> (via Disney Network ONLY)
- C. Type your Windows (LAN) Credentials (User Name, and Password).
- D. Click **Sign In**.



USER ID:

PASSWORD:

**C**

**D** Sign In

For Internet Explorer 10 users.

If you do not see an error on this page, but still cannot sign in, please try switching to Compatibility Mode within Internet Explorer.



Once signed in, you will be presented with a PMCS/NexGEN Role Matrix Manager Dashboard – this is your homepage. Here, you can keep track of your last 10 requests made and the corresponding status of each request:

## Request a New PMCS/NexGEN User

### Step 1: Select Project

- A. Click on the **Project Resources** tab.
- B. Select the appropriate **Sub Project**.

Home **A** Project Resources WBS/CBS Conversions Reports Projects Companies Divisions Roles

Sub Project Select: **B**

- Select --
- Aulani Resort
- DCA & MK - Little Mermaid Enhancement
- DCA - Condor Flats Placemaking
- DCA - Luigi's Reconcept
- DCA Expansion Buena Vista St/Main Entry
- DCA Expansion Cars Land
- DCA Expansion Creative Entertainment
- DCA Expansion Enchanted Books
- DCA Expansion Overall Core Team/Overall & Ops Requirements
- DCA Expansion Paradise Pier & Mania Carts/Shade Structures
- DCA Expansion Stealth Works/ROH




Once a project is selected, a complete list of current PMCS/NexGEN Users for that project will be displayed.

## Step 2a: Add a New Disney User

- A. Click **Add Disney Resource**.

Sub Project Select:  **A** Add Disney Resource

- B. Enter in Disney Employee's PERNR or First and Last Name.
- C. Click **Search By PERNR** or **Search By Name** button based on entry.
- D. Click **Select** to add the User to the Project.

 If User was not found proceed to Step 3: Add New Resource.

- E. Click **Submit** and the User is now added to the project.

**Sub Project:** DLR - DL - Project 28

Enter Search Criteria

PERNR:  Must be full number, including leading zeros.  
Example: 0000001 **C** Search By PERNR  
 First Name:  **B** Last Name:  **C** Search By Name

Disney Resources

	PMCSID	First Name	Last Name	Title	City	E-Mail	PERNR
Select	SMITJ841	John	Smith	Security Host/Hostess	Lake Buena Vista	JOHN.X.SMITH@DISNEY.COM	01393465
Select	SMITJ580	John	Smith	FT Custodial H/H 3rd Shift (05)	Anaheim		00703733
Select	SMITJ780	John	Smith	Watercraft H/H	Lake Buena Vista	JOHN.D.SMITH@DISNEY.COM	01236301
Select	SMITJ146	John	Smith	Sr Project Mgr	Kissimmee	John.E.Smith@disney.com	92139858
Select	SMITJ109	John	Smith	Lead Solution Architect	Orlando	John.A.Smith@disney.com	92036917
Select	SMITJ083	John	Smith	Mgr-Global Applied Technology	Lake Buena Vista	Doug.Smith@disney.com	92013325

**Add New Resource**

**WARNING:** Adding a New Resource that is already in the system may cause delays in processing. Please be sure to check if the resource already exists.

<< Previous
**E** Submit

## Step 3a: Add New User Resource

- A. Click **Add New Resource** Button.


Lead Solution Architect	Orlando	John.A.S
Mgr-Global Applied Technology	Lake Buena Vista	Doug.Srn

**A** Add New Resource

already in the system may cause delays in processing. ady exists.

- B. Select User's **Division** from Drop Down.

- C. Enter User's **First Name**.
- D. Enter User's **Last Name**.
- E. Enter City **Location** of User's workplace.
- F. Enter User's business **E-mail Address**.
- G. Select the appropriate **Role Category**.

 The Add New Resource Profile window that follows will either contain some pre-filled info (if the User existed previously) or be blank. In either case, fill in the top portion required **USER INFORMATION**.

**Add New Resource Profile**

Profile Data

User Type:

PERNR:

First Name:

Location:

Division:

Last Name:

PMCSID:

Cognos:


Middle:


E-Mail:

Select Role Category:

Assign Additional Roles (if ):

Administrator	Contract Accounting
Archive Utility Role	Contract Administrator
CMFO	Division Finance
Construction Manager	Division Planner
Contract Accounting	Document Control
Contract Administrator	Finance Accounting
Cost Event Risk List - Edit	LOA : Finance - Director
Division Finance	LOA : Finance - Manager
	LOA : Finance - VP Controls

 Each **ROLE CATEGORY** comes with an inherent set of individual roles. So once you've chosen the role category, you will see all the roles included in that category displayed in the right hand box (preceded by "cat\_").

 If a particular needed role is not included in the selected category, then you may assign additional individual roles (aka ad hoc roles) to the user. From the Assign Additional Roles list:

- H. Select Role.
- I. Click on the right add button.

Select Role Category:

Assign Additional Roles (if needed):

<ul style="list-style-type: none"> <li>Administrator</li> <li>Archive Utility Role</li> <li>CMFO</li> <li>Construction Manager</li> <li>Contract Accounting</li> <li>Contract Administrator</li> <li>Division Finance</li> <li>Division Planner</li> <li>Document Control</li> <li>Finance Accounting</li> <li>Initiator - Correction</li> <li>Initiator - Cost Event</li> <li>Initiator - JFC External</li> </ul>	<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">H</div>	<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">I</div>	<div style="background-color: #0070C0; color: white; padding: 2px 10px; border: 1px solid #0070C0; margin: 0 auto;">&gt;&gt;</div> <div style="background-color: #0070C0; color: white; padding: 2px 10px; border: 1px solid #0070C0; margin: 0 auto;">&lt;&lt;</div>	<ul style="list-style-type: none"> <li>cat_Cost Event Risk List - Editor</li> <li>cat_Inspection Documents Upda</li> <li>cat_LOA : Project - Assoc. Mana</li> <li>cat_Project Manager</li> <li>cat_Responsible Individual</li> <li>cat_Staff - View Role</li> <li>cat_Supplemental Stakeholder</li> </ul>
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J. Click **Submit** Button.

**WARNING:** Adding a New Resource that is already in the system may cause delays in processing. Please be sure to check if the resource already exists.



## Step 2b: Add a New Vendor User

A. Click **Add Vendor Resource**.

Sub Project Select:   **A**

B. Click **Select** to obtain the Vendor list.

C. Select the **Company Number** or **Company Name** for appropriate Vendor.

D. Click **Select** to add the Vendor User to the Project.

If Vendor User was not found proceed to Step 3b: Add New Vendor User Resource.

E. Click **Submit** and the User is now added to the project.

Sub Project: DLR - DL - Project 28

Select a Company: Company Number  Company Name  B Select

## Vendor Resources

PMCSID	First Name	Middle Name	Last Name	Email	Participating
<a href="#">Select</a>	Jeremy		Wall	jeremy@celticengineering.com	<input type="checkbox"/>
<a href="#">Select</a>	Mike		Teske	Mike.teske@celticengineering.com	<input type="checkbox"/>
<a href="#">Select</a>	Guillermo		Soriano	guillermo@celticengineering.com	<input type="checkbox"/>
<a href="#">Select</a>	Wen (Wenjun)		Li	wen.li@celticengineering.com	<input type="checkbox"/>

Add New Resource

WARNING: Adding a New Resource that is already in the system may cause delays in processing. Please be sure to check if the resource already exists.

<< Previous E Submit

## Step 3b: Add New Vendor User Resource

- A. Click **Add New Resource** Button.

Lead Solution Architect	Orlando	John.A.S
Mgr-Global Applied Technology	Lake Buena Vista	Doug.Srn

A Add New Resource

already in the system may cause delays in processing. already exists.

- B. Enter Vendor User's **First Name**.
- C. Enter Vendor User's **Last Name**.
- D. Enter City **Location** of Vendor User's workplace.
- E. Enter Vendor User business **E-mail** address.
- F. Select appropriate **Role Category**.
- G. Select Role **Assign Additional Roles. (if needed)**
- H. Click on the right add button.
- I. Click **Submit** button.



The Add New Resource Profile window that follows will either contain some pre-filled info (if the Vendor User existed previously) or be blank. In either case, fill in the top portion required USER INFORMATION.

**Sub Project:** DLR - DL - Project 28

**Add New Resource Profile**

Profile Data

User Type:

Vendor Company:

First Name:  Last Name:  Middle:

Location:  PMCSID:  E-Mail:

Is Participating:  Cognos:

Select Role Category:

Assign Additional Roles (if needed):

Inspection Documents Update Role Prime Stakeholder Supplemental Stakeholder (3rd Party Vendor) Vendor Vendor - Primary Contact (RI) Vendor - View Role	<input type="button" value="H"/>	<input type="button" value="G"/>	<input type="button" value="H"/>	<input type="button" value="H"/>
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Special Instructions for PMCS Team:

Provide any special instructions for changes if applicable.

**Note:** Use special instructions to indicate when...

- A person is not involved on all attractions.
- A person needs to be deactivated.
- A change or addition is required for a Distribution List.
- To indicate the Company Name of a PWA subcontractor.

## RMM REQUEST PROCESSING

Our target is to complete all requests within 24 hours from the time of the submission. The PMCS/NexGEN Support Team will process the request and the following notifications will be generated:

- To the New Disney User, one e-mail from WDI.NexGEN@Disney.com, welcoming them to the PMCS/NexGEN community and providing them with all the necessary info to get started.
- To the New Vendor User, two e-mails from WDI.NexGEN@Disney.com, welcoming them to the PMCS/NexGEN community and providing them with all the necessary info to get started.

- To the RMM Requestor, one e-mail from WDI.NexGEN@Disney.com, confirming that their request has been processed.

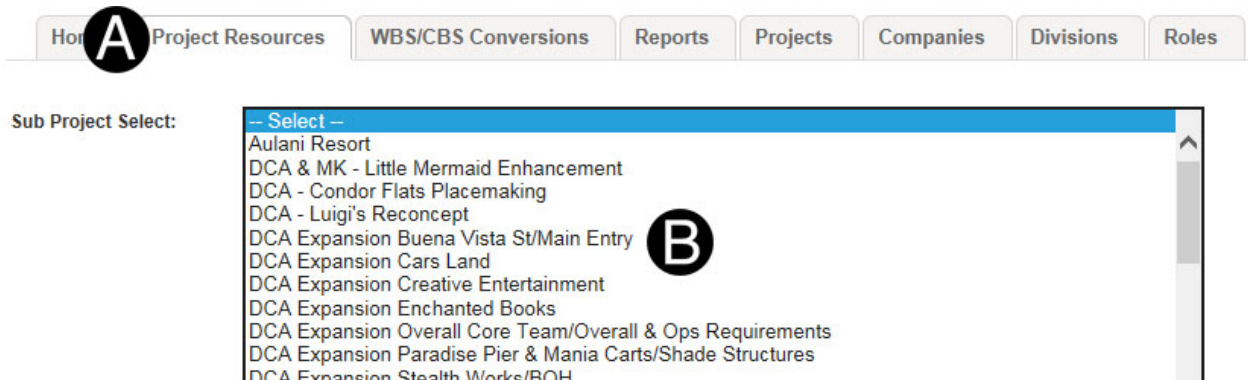
# Modify an Existing User Account

In addition to creating New User accounts, you can also modify Existing User accounts:

- Modify Role Category
- Add or remove Additional Roles
- User needs to be
  - Added to/removed from a Distribution List
  - Set as the RI for a Contract
  - Set as the Contract Administrator for a Contract
- De-activate a User

## Step 1: Select Project

- Click on the **Project Resources** tab.
- Select the appropriate **Sub Project**.



- Click Select for User to be modified.

Sub Project Select:  Add Disney Resource

	Full Name	PMCS ID	E-Mail
<a href="#">Select</a>	ADASYOALI GFNKGINUA	GLYNJV01	Mickey@Test.com
<a href="#">Select</a>	AEILMLODE DFDSDFDLK	SAVERV01	Mickey@Test.com
<a href="#">Select</a>	ALANIIONM LAADAIOOS	MORACV01	Mickey@Test.com
<a href="#">Select</a>	ANIONOALA NIASAAENN	CostI012	Mickey@Test.com
<a href="#">Select</a>	ANKADCMYN EEASFNSOE	VERHC001	Mickey@Test.com
<a href="#">Select</a>	AOMAEUSMM NAAOSSSNO	MARHA001	Mickey@Test.com
<a href="#">Select</a>	AUCMOOOOC AOYMAFNSI	HUANJ169	Mickey@Test.com
<a href="#">Select</a>	AYDAMOMYM YOYLKSEEN	HERNOV01	Mickey@Test.com



The User's profile window will open, where you can make all the necessary changes:

- modify Role Category
- add or remove Additional Roles
- associate to a Distribution List
- set as the RI for a contract
- set as the Contract Administrator for a contract
- de-activate the User



To De-activate the User's account for the given project (will not affect any other projects the User may be on), simply un-check the **Active** checkbox.

D. Click **Submit** button after modifications have been made.

**Sub Project:** DLR - DL - Project 28

**Modify Resource Profile**

Profile Data

User Type:	<input type="text" value="Disney"/>	Division:	<input type="text" value="Project Management"/>	Middle:	<input type="text"/>
PERNR:	<input type="text" value="00806803"/>	Last Name:	<input type="text" value="Fisher"/>	E-Mail:	<input type="text" value="ANDREW.W.FISHER@DISN"/>
First Name:	<input type="text" value="Andrew"/>	PMCSID:	<input type="text" value="FISHA059"/>	Cognos:	<input type="text" value="Yes"/>
Location:	<input type="text" value="Glendale"/>	Active:	<input checked="" type="checkbox"/>		

Select Role Category:

Assign Additional Roles (if needed):

<ul style="list-style-type: none"> <li>Finance Accounting</li> <li>Initiator - Correction</li> <li><b>Initiator - Cost Event</b></li> <li>Initiator - JFC External</li> <li>Initiator - JFC Internal</li> <li>Lead Estimator</li> <li>Lead Finance</li> <li>LOA : Finance - Analyst / Sr. Analyst</li> <li>LOA : Finance - CFO</li> <li>LOA : Finance - Director</li> <li>LOA : Finance - Manager</li> <li>LOA : Finance - VP Controls</li> <li>LOA : HK International Finance - Analyst / Sr. Analyst</li> </ul>	<p>&gt;&gt;</p> <p>&lt;&lt;</p>	<ul style="list-style-type: none"> <li>cat_Cost Event Risk List - Editor</li> <li>cat_Inspection Documents Update Rol</li> <li>cat_LOA : Project - Assoc. Manager</li> <li>cat_Project Manager</li> <li>cat_Responsible Individual</li> <li>cat_Staff - View Role</li> <li>cat_Supplemental Stakeholder</li> <li>LOA : Project - Manager</li> </ul>
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<< Previous

D

Submit

## Reports

As a Role Matrix Manager, you have the ability to generate comprehensive reports for all NexGEN/PMCS Users:

- **Master List Report:** Containing all Users and their account info (regardless of current status).
- **Request History Report:** Documenting all requests/modifications made to a User's Account.

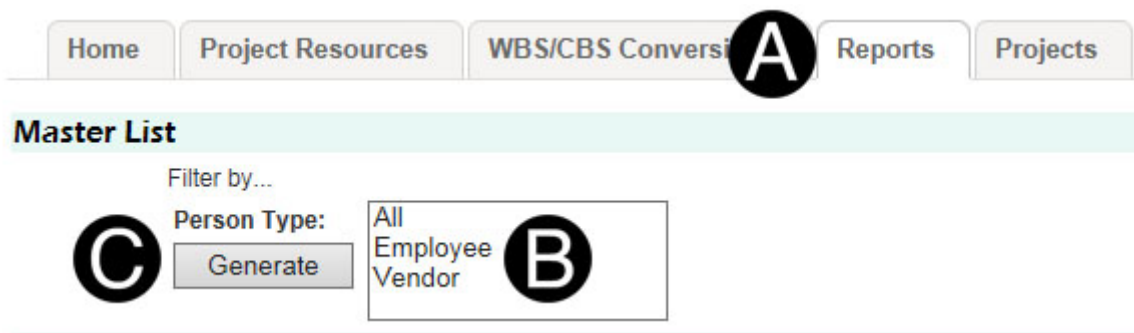
## Create Master List Report

## Step 1: Generate Master List

- A. Click **Reports** tab.
- B. In **Filter by** select **All**, **Employee** or **Vendor**.
- C. Click **Generate** button.



The report will open in an Excel spreadsheet you will then be able to sort and format to your choice.



## Create Request History Report

### Step 1: Generate Request History

- A. Click **Reports** tab.
- B. In **Filter by** select **All**, **Employee** or **Vendor**.
- C. Select **Project** or specific **Person**.
- D. Click **Generate** button.



The report will open in an Excel spreadsheet you will then be able to sort and format to your choice.

### Master List

Filter by...

Person Type:

All  
Employee  
Vendor

Generate

### Request History

Filter by...

**D**

Person Type:

All  
Employee  
Vendor

Generate

**B**

-and/or- Project:

Aulani Resort  
DCA & MK - Little Mermaid Enhancement  
DCA - Condor Flats Placemaking  
DCA - Luigi's Reconcept  
DCA Expansion Buena Vista St/Main Entry  
DCA Expansion Cars Land  
DCA Expansion Creative Entertainment

+

**C**

-OR by- Person:

Aaron Allen  
Abbie Bender  
Abby Brandenburg  
Abdallah Ghazaleh  
Abe Chorbajian  
Accounting User1  
Accounting User2

+

Active Resources Only?