RMM_User_Guide

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.

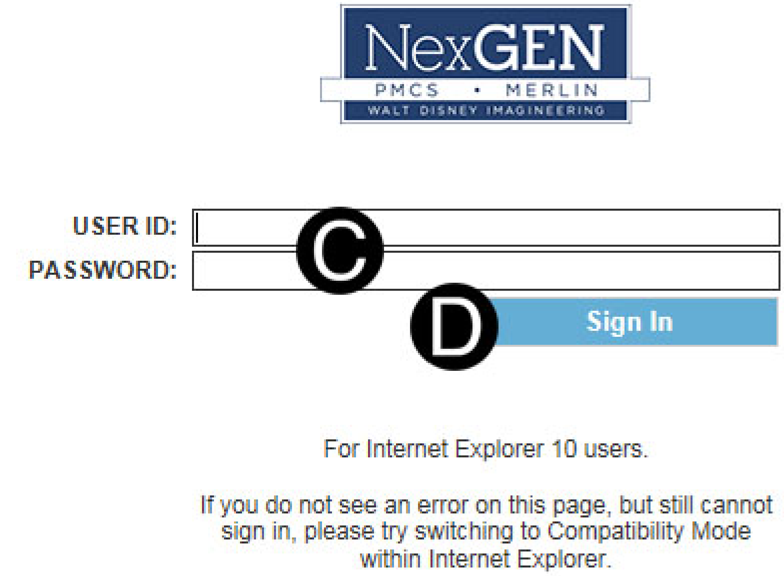
In the case where only a modification is requested to an existing User's profile, a single e-mail notification will be sent to the Requestor ONLY.

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

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**.

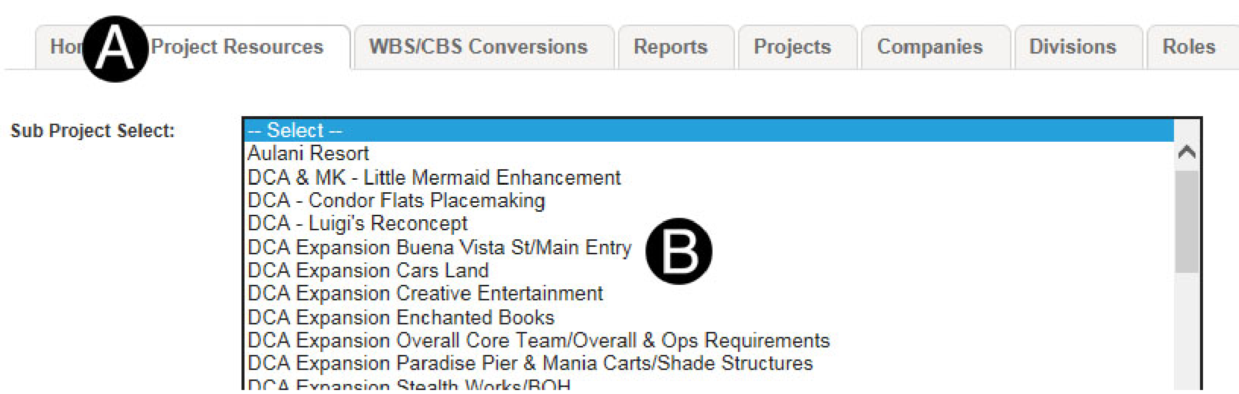


Once signed in, you will be presented with a PMCS/NexGEN Role Matrix Manager Dashboard – this is your homepage. Here, you can keep track of your last 10 requests made and the corresponding status of each request:

Request a New PMCS/NexGEN User

Step 1: Select Project

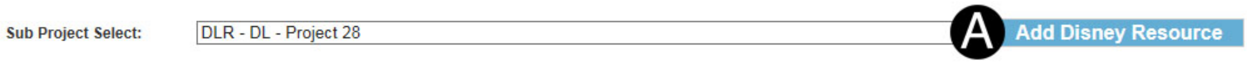
A. Click on the **Project Resources** tab.
B. Select the appropriate **Sub Project**.



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

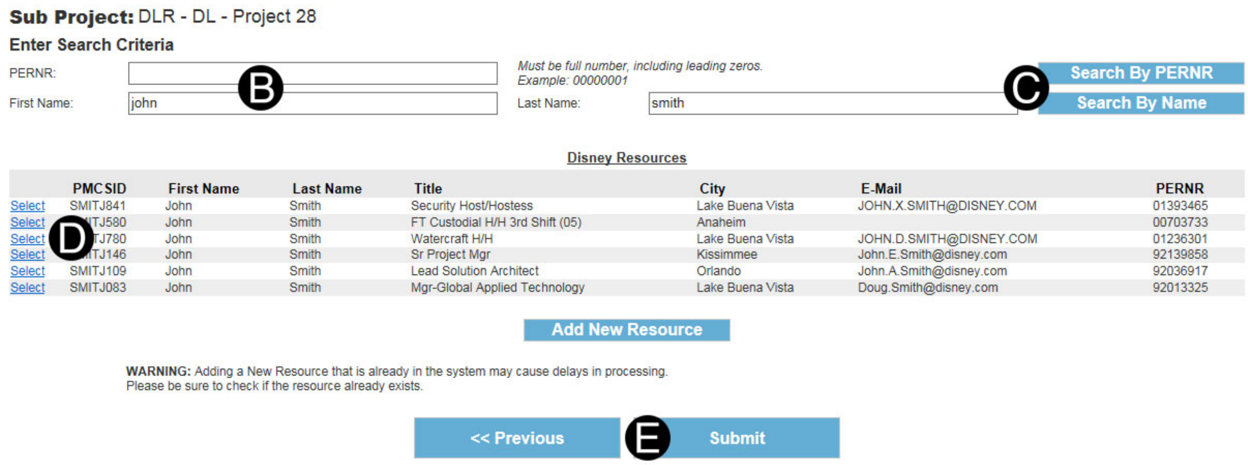
A. Click **Add Disney Resource**.



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.

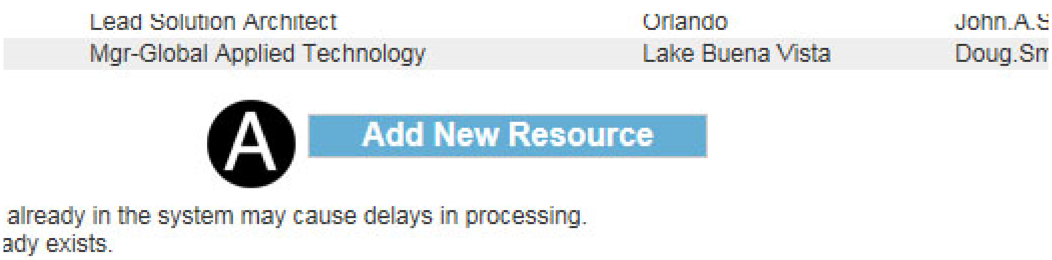
E. Click **Submit** and the User is now added to the project.



	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	ITJ580	John	Smith	FT Custodial H/H 3rd Shift (05)	Anaheim		00703733
Select	TJ780	John	Smith	Watercraft H/H	Lake Buena Vista	JOHN.D.SMITH@DISNEY.COM	01236301
Select	ITJ146	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

Step 3a: Add New User Resource

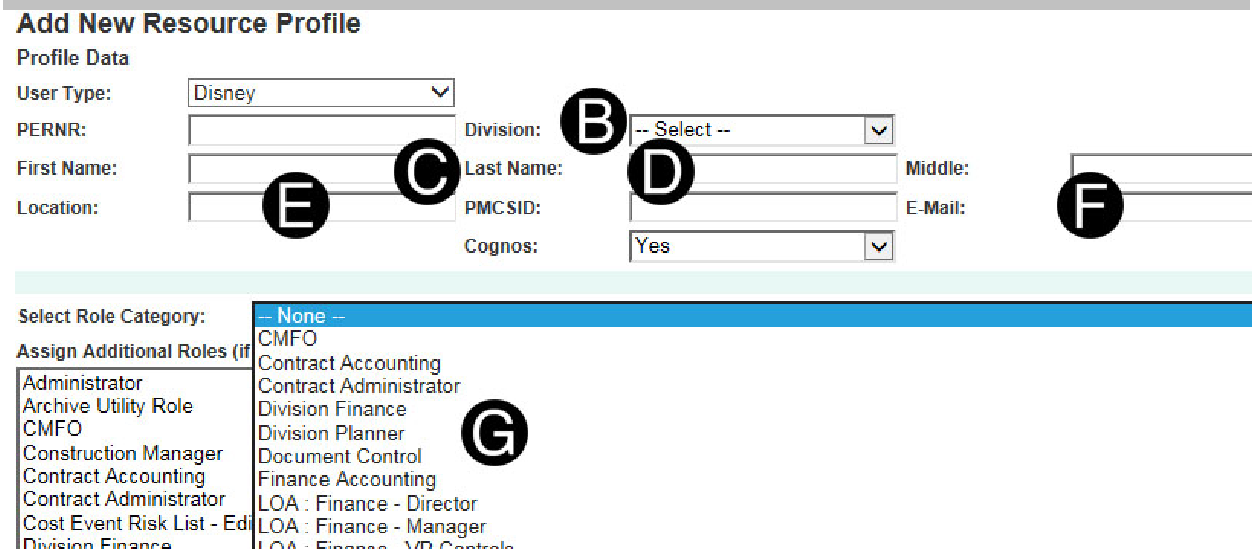
A. Click **Add New Resource** Button.



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**.

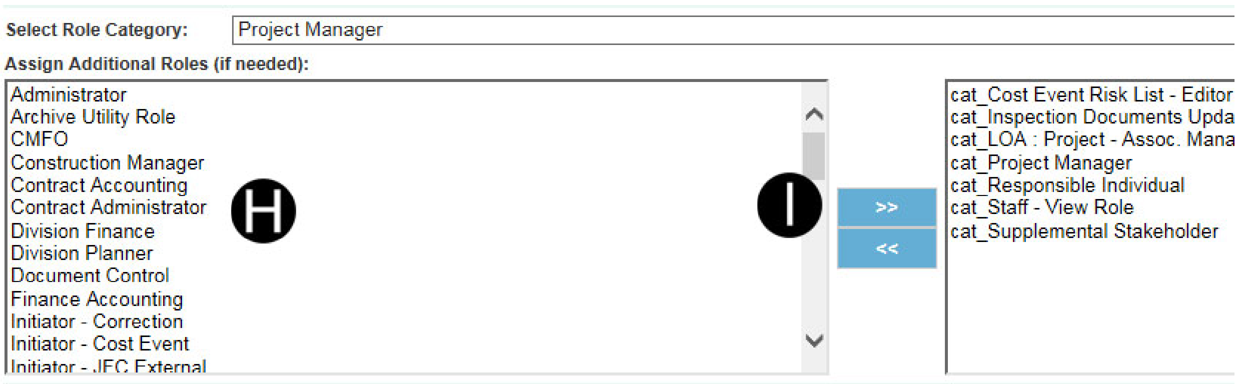
The Add New Resource Profile window that follows will either contain some pre-filled info (if the User existed previously) or be blank. In either case, fill in the top portion required USER INFORMATION.



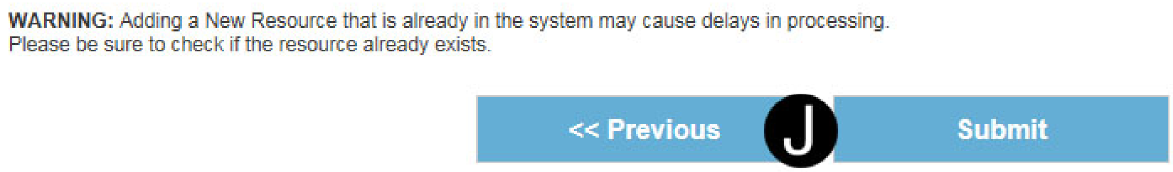
Each **ROLE CATEGORY** comes with an inherent <u>set of individual roles</u>**.** So once you've chosen the role category, you will see all the roles included in that category displayed in the right hand box (preceded by "cat_").

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.

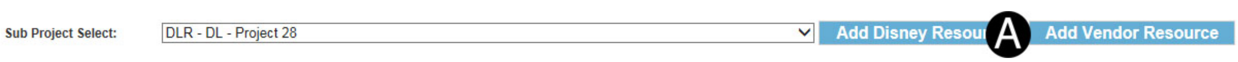


J. Click **Submit** Button.



Step 2b: Add a New Vendor User

A. Click **Add Vendor Resource**.



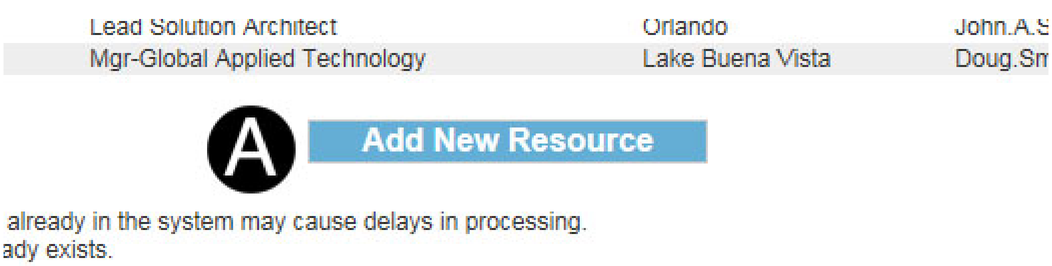
B. Click **Select** to obtain the Vendor list.
C. Select the **Company Number** or **Company Name** for appropriate Vendor.
D. Click **Select** to add the Vendor User to the Project.

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.

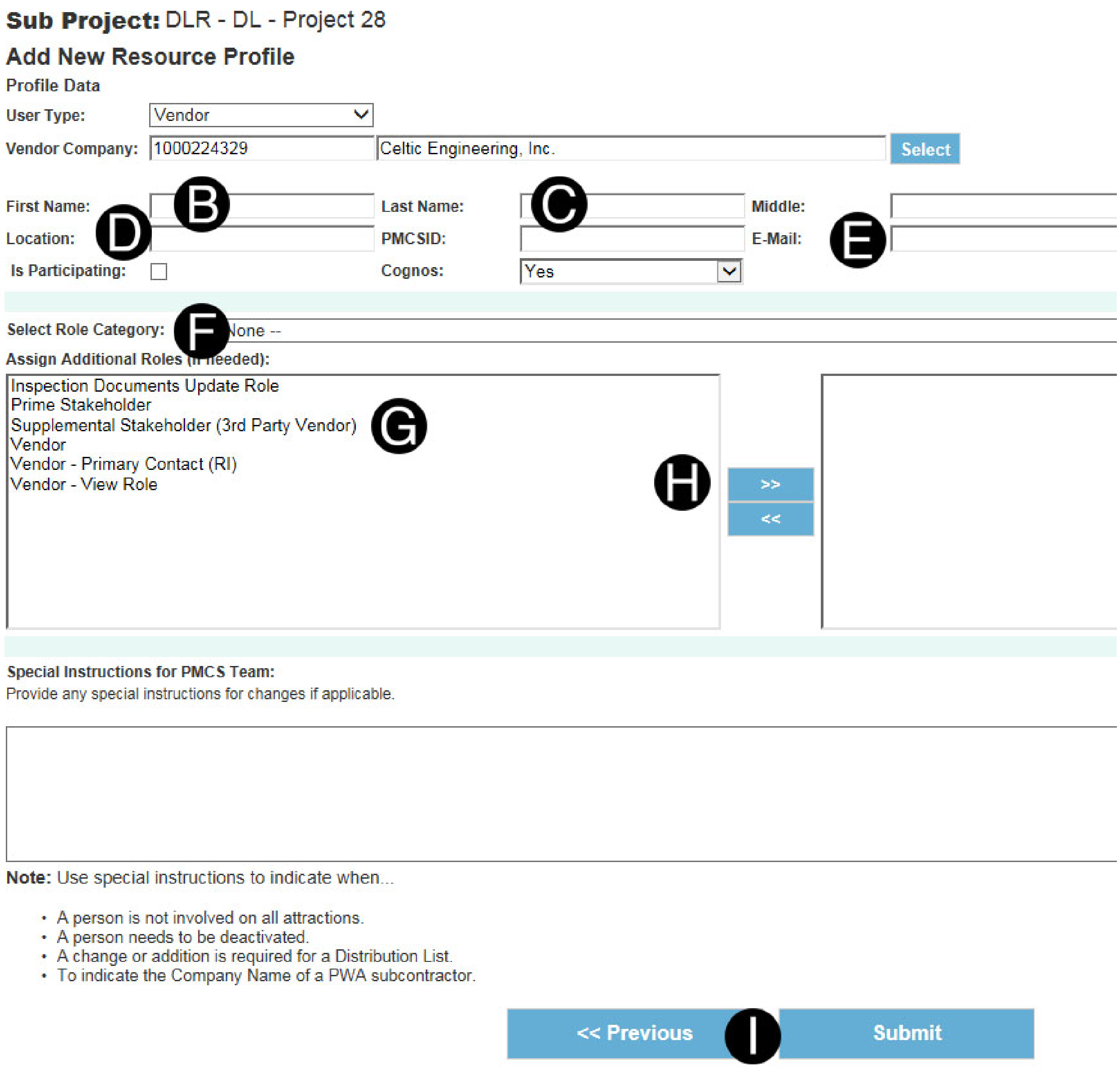
Step 3b: Add New Vendor User Resource

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



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.



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.

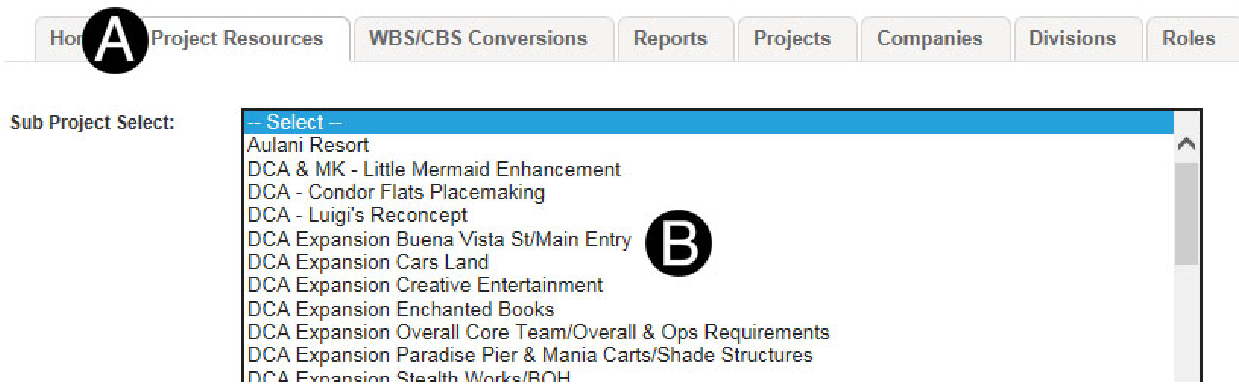
Modify an Existing User Account

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

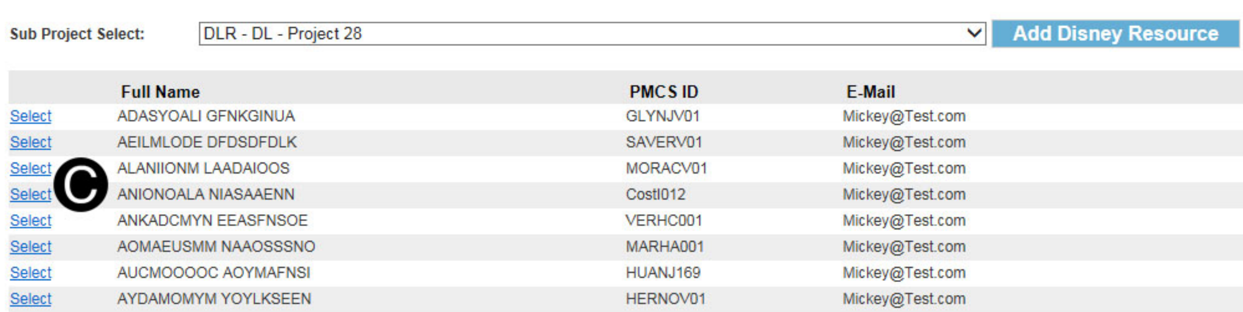
- Modify Role Category
- Add or remove Additional Roles
- User needs to be
    - Added to/removed from a Distribution List
    - Set as the RI for a Contract
    - Set as the Contract Administrator for a Contract
- De-activate a User

Step 1: Select Project

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



C. Click Select for User to be modified.



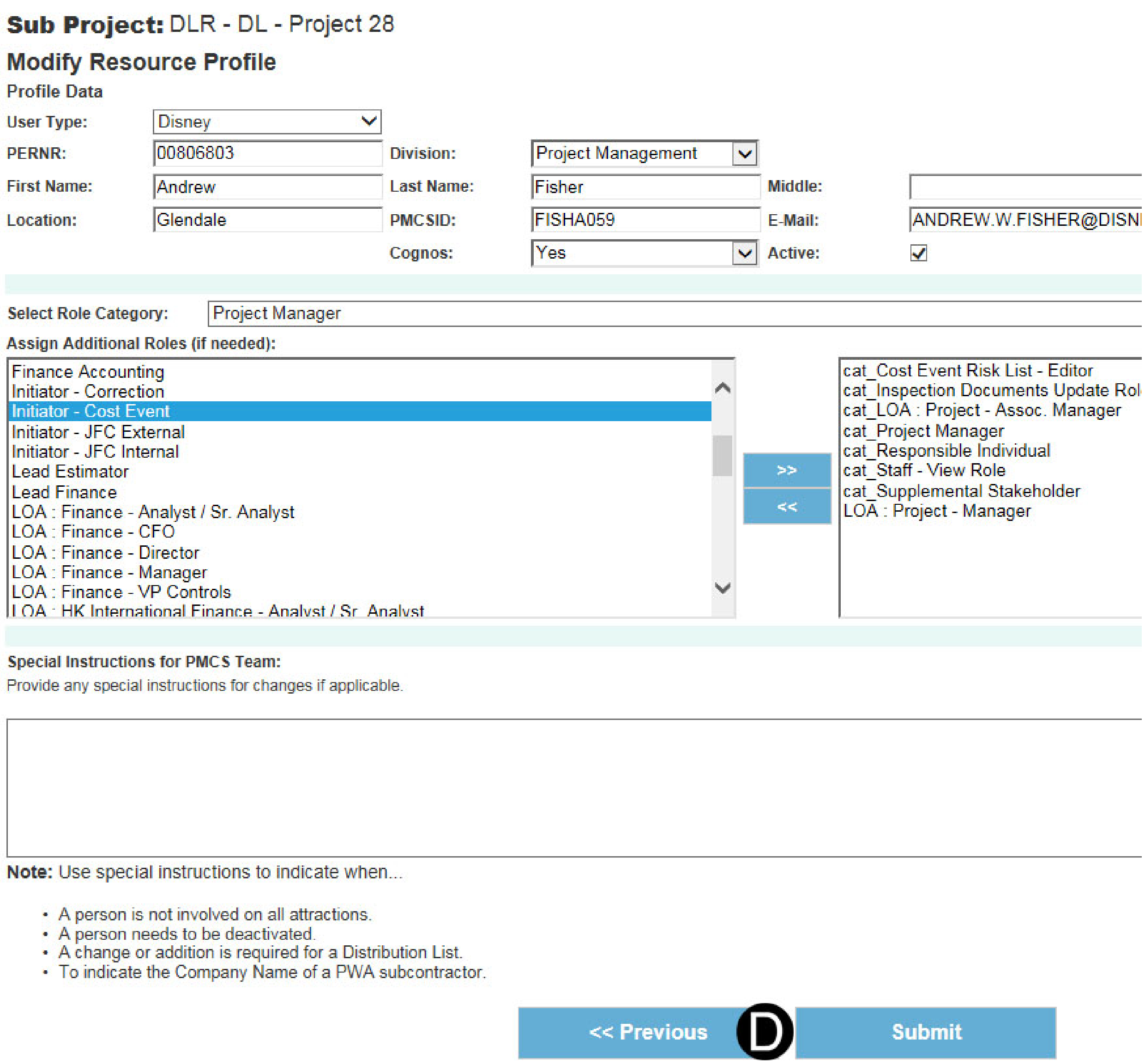
	Full Name	PMCS ID	E-Mail
Select	ADASYOALI GFNKGINUA	GLYNJV01	Mickey@Test.com
Select	AEILMLODE DFDSDFDLK	SAVERV01	Mickey@Test.com
Select	ALANIIONM LAADAIOOS	MORACV01	Mickey@Test.com
Select	ANIONOALA NIASAAENN	Costl012	Mickey@Test.com
Select	ANKADCMYN EEASFNSOE	VERHC001	Mickey@Test.com
Select	AOMAEUSMM NAAOSSSNO	MARHA001	Mickey@Test.com
Select	AUCMOOOOC AOYMAFNSI	HUANJ169	Mickey@Test.com
Select	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.



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.

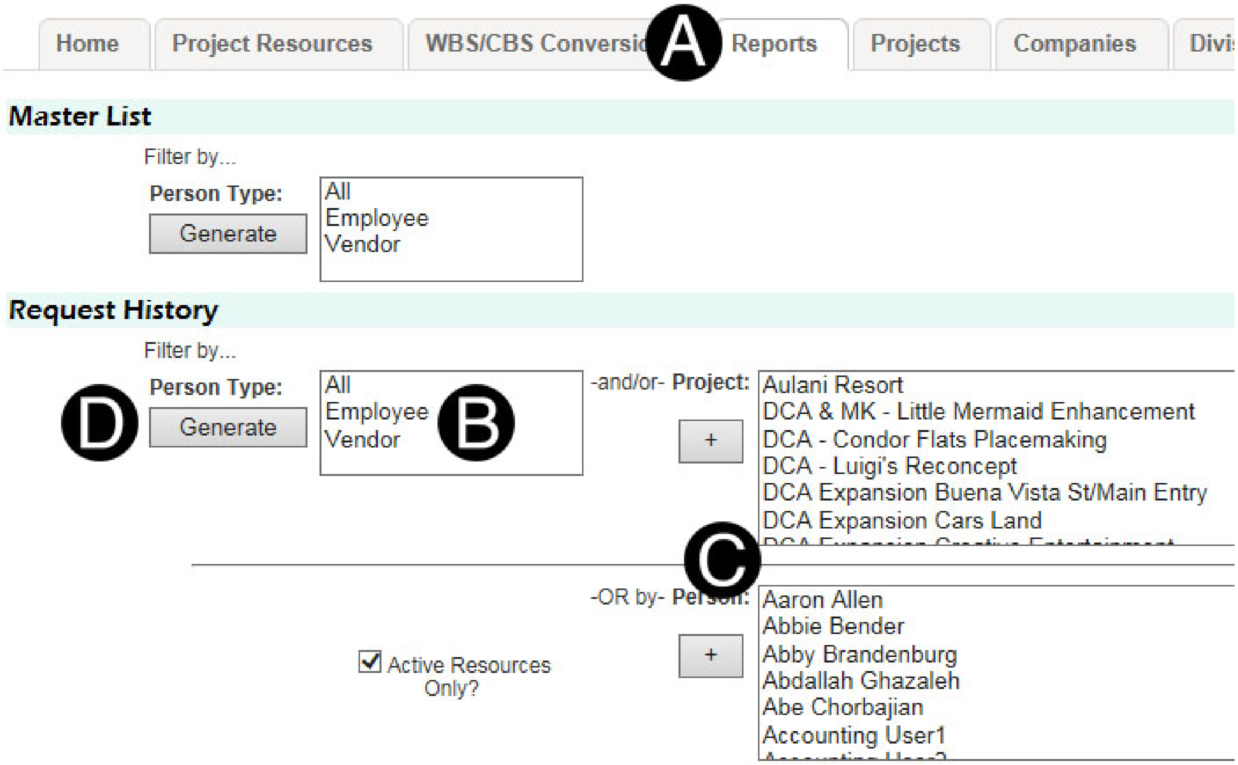
The report will open in an Excel spreadsheet you will then be able to sort and format to your choice.

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.


Home
Project Resources
WBS/CBS Conversi
A
Reports
Projects
Companies
Divi
Master List
Filter by...
Person Type:
Generate
All
Employee
Vendor
Request History
Filter by...
Person Type:
D
Generate
All
Employee
Vendor
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
C
-OR by- Person:
+
Active Resources Only?
Aaron Allen
Abbie Bender
Abby Brandenburg
Abdallah Ghazaleh
Abe Chorbajian
Accounting User1