



FACT SHEET 15 USER ACCESS TO CBMS

This fact sheet describes the process and approval requirements for new and existing users to request access to the Central Budget Management System (CBMS).

Who is affected?

All users who need access to CBMS will be required to submit a new User Access Request Form.

Process

To gain access to CBMS, users need to complete an Access Form, obtain authorisation from the relevant CFO or Assistant Secretary (Finance and Treasury), and submit the completed form to the CBMS Service Centre. The forms are available at:

- [Entity Access Form](#)
- [Finance Users and Administrators Access Form](#)
- Treasury Decision Making User Access Form – Contact the CBMS Service Centre, cbms@finance.gov.au
- PNFC/PFC User Access Form – Contact the CBMS Service Centre cbms@finance.gov.au

Full details of the process are at the end of this Fact Sheet. Users will be provided access to the CBMS homepage and training materials. Access to modules will be granted upon completion of training for the module/s approved in the user access request.

User responsibilities and authorisation for accessing and using CBMS

Security classification and clearances Authorisation

CBMS is a classified ICT system rated up to and including PROTECTED.

The entity Chief Financial Officer (CFO), Finance/Treasury Assistant Secretary or equivalent must authorise user access and ensure that users hold a minimum security clearance of PROTECTED.

User IDs and Passwords

Entity users access the system using a two-step authentication process:

Step 1 – Use the CBMS login ID and password. Passwords must be at least 10 characters long and consist of at least three of the following character sets:

- Lowercase alphabetic characters (a, b, c, ...z)
- Uppercase alphabetic characters (A, B, C, ...Z)
- Numeric characters (0, 1, 2, ...9)
- Special characters (!, \$, #, %, ...)

Step 2 – Use the One Time Password (OTP) generated by either a physical or a soft token.

User responsibilities

Users are responsible for all activities performed in CBMS with their logon. Users must ensure tokens, logons and passwords are protected from unauthorised access or abuse.

Do not under any circumstances allow tokens, logons or passwords to be used by anyone other than the authorised user. When not in use, physical tokens are to be stored in a secure place, e.g. a locked cabinet or on the user.

CBMS data, attachments and printouts

Obligations for managing data, attachments and printouts are:

- Attachments must not exceed the level of PROTECTED.
- Where users transfer data to and from CBMS, they are held accountable for the data they transfer through entity policies and procedures.
- Scan data prior to importing to CBMS for malicious and active content.
- Implement protective marking checks when exporting data from CBMS.
- Manage and store any printouts and data exports in accordance with the data classification and only distribute to entity staff on a "need to know" basis.

Caution: Be careful with *Sensitive: Cabinet* documents, as the classifications of these may range from PROTECTED to TOP SECRET.

What to do if you suspect a Security Breach

Contact the CBMS Service Centre on 02 6215 2000 immediately.

Note: All security breaches are logged and may be reported to your Entity IT Security Advisor. A breach may result in removal of the user from the CBMS.

Access Reviews / Inactivity

Access reviews of all CBMS users are conducted on a regular basis. Entity CFOs and Finance/Treasury Branch Heads must inform the CBMS Service Centre ASAP when users no longer require access to CBMS (e.g. on cessation, or moving to a different position where CBMS access is no longer required).

Users who have not accessed CBMS in six months will be made inactive. Users will be contacted after five months of inactivity, and will be made inactive after six months of inactivity.

Which form do I need to complete?

Forms	
GGs Entity Users	<p>CBMS Entity Access Form</p> <p>This form is to be completed by all General Government Sector (GGs) Entity users, including the Finance CFO Branch. Please send completed forms to cbms@finance.gov.au for processing.</p>
Department of the Treasury (Treasury), Decision Making Users	<p>Department of the Treasury Officers who require access to the Decision Making module must contact the CBMS Service Centre on (02) 6215 2000.</p>
PFC/PNFC entity users	<p>There is a separate access form for users in entities in the Public Financial Corporations (PFC) and Public Non-Financial Corporations (PNFC) sectors. This form is emailed directly to these entities on request. Please contact the CBMS Service Centre on (02) 6215 2000 if you need a copy of this form. PNFC/PFC entity users will only have access to their own entity's data and will not have access to any Protected documents (e.g. EMs) on CBMS.</p>
Department of Finance (Finance) Users and Administrators	<p>Department of Finance Users and Administrators Access Form (available on Finance intranet)</p> <p>Department of Finance Users (excluding CFO Branch), including those requesting Administration roles, will need to complete this form.</p>

Entity Users - How do I fill in the form?

User Information	
New User	New User indicator. Must be selected if you are not an existing CBMS user.
Existing User / User ID	Existing User indicator. Select if you are an existing CBMS user. Provide your existing CBMS User ID (beginning with 'Z').
Access	If Existing User selected, indicate if the request is for additional access, to remove access or to update user details.
Tokens	
<p>All new users will be assigned soft tokens, however if a hard token is necessary then the user is required to email cbms@finance.gov.au for assessment.</p>	
Access Details	
Homepage only	Provides access to the eLearning training, online help and other reference material such as Estimates Memoranda, Newsletters and other guidance.
Limited to control type	Advise if access is to be limited to the departmental or administered control type. If neither box is checked, access to both control types will be granted.
Portfolio Access	Choose portfolio if you need access to all the entities within your portfolio. This is available to Portfolio Entity (i.e. Department) users only.
Entity Access	Choose the entity you need access to. If you choose a portfolio, do not choose an entity. If you require access to multiple entities access but not all the entities within your portfolio, please specify additional entities in the "Other, please specify" section.

Other, please specify	Specify any other access required, or where access is to be removed. For access to a specific program only, please advise here. DO NOT specify to copy someone else's access as this is invalid from an audit perspective and your form will not be processed.
Module Access	
Reporting	Allows users to run reports for the selected module(s) and display transactions in Cash Management (if selected).
Data Entry	Allows users to enter data in forms / transactions and advance to the "To Authorise" stage.
Authorise	Allows users to Authorise forms / transactions.
User Defined Reporting	Allows users to create and save their own reports for the Estimates and Actuals components. This access is restricted to users in entities, authorised to view data for all Estimates and Actuals components. This access will only be granted if the user has selected (and had approved) Reporting access for all of the Annual Estimates, Annual Actuals, Monthly Profiles and Monthly Actuals components.
Authorisation	
Applicant	The applicant agrees to the User Responsibilities above
Authoriser	Signatory is Entity CFO The Authoriser is to sign and authorise the access request form and confirm the applicant has the appropriate security clearance and will carry out the User Responsibilities.

Treasury users access to Decision Making module – how to fill the form

User Information	
New User	New User indicator.
Existing User / User ID	Existing User indicator. Select if you are an existing CBMS user. Provide your existing CBMS User ID (beginning with 'Z').
Access	If Existing User selected, indicate if the request is for additional access, to remove access or to update user details.
Tokens	
All new users will be assigned soft tokens, however if a hard token is necessary then the user is required to email cbms@finance.gov.au for assessment.	
Required Access	
Work Area	Users will need to select one of the following: <ul style="list-style-type: none"> • BEAU – Budget Estimates & Analysis Unit • BPRU – Budget Priorities & Reporting Unit • FFU – Federal Finances Unit • TAD – Tax Analysis Division
Other, please specify	Specify any other access required, or where access is to be removed.

Authorisation	
Applicant	The applicant agrees to the User Responsibilities above.
Authoriser	Signatory is Entity CFO or relevant Assistant Secretary. The Authoriser approves via email the access request form and confirm the applicant has the appropriate security clearance and will carry out the User Responsibilities.

Finance users – how to fill the form

User Information	
First Name / Last Name	Enter your first and last name in the appropriate fields.
Group	Select your business group from the drop down list. Depending on your choice, subsequent options for Division and Branch/Section will appear. Select your Division and Branch/Section.
Phone Number / Email Address	Enter your phone number and email address.
Access Requirements	
Basic CBMS	Provides access to the eLearning training, online help and other reference material such as Estimates Memoranda, Newsletters and other guidance.
Administration Access	If you require Administration Access, check this box. “Type of Admin Access” choices will appear for you to choose from. Check the box for each type of Admin Access you require. Depending on the options you select, you may need to provide further information.
Type of Module Access	
Data Entry	Allows users to enter data in forms / transactions and advance to the “To Authorise” stage. (Entity role)
Authorise	Allows users to Authorise forms / transactions. (Entity role)
Validate	Allows users to Validate forms / transactions. (Finance role)
Reporting	Allows users to run reports for the selected module(s) and display transactions in Cash Management (if selected).
Cashflow Check	An AE module role for checking Cashflow data.
AAU Approval	Cash Management Appropriation Adjustments AAU Approval role.
Analysis for Excel	Allows users to access Estimates and Actuals data via Excel. This option will only appear if you have selected Reporting access for all of the Annual Estimates, Annual Actuals, Monthly Profiles and Monthly Actuals components.
User Defined Reporting	Allows users to create and save their own reports for the Estimates and Actuals components. This access is restricted to users in entities, authorised to view data for all Estimates and Actuals components. This option will only appear if you have selected Reporting access for all of the Annual Estimates, Annual Actuals, Monthly Profiles and Monthly Actuals components.

Decision Making Access	Check the box for your area. If you are an AAU, you will only be allowed access to your Portfolio
Data Access Requirements	
<p>Select only one check box. If you choose “Multiple Portfolios or Entities” and you have selected one or more Portfolios, do not select Entities that are under one of the Portfolios already selected.</p> <p>If you choose “One Portfolio”, select the Portfolio from the list which appears. You do not need to select any entities from the next list unless you want your access restricted to those entities.</p>	
Other Access Requirements	
<p>Any requirements that are not available on the form.</p> <p>DO NOT specify to copy someone else’s access as this is invalid from an audit perspective and your form will not be processed.</p>	
Authorisation	
Applicant	You need to check the box agreeing to the User Responsibilities above.
Assistant Secretary	<p>Enter your Assistant Secretary’s email. When you click the Submit button, an email to your Assistant Secretary will be generated automatically.</p> <p>Your Assistant Secretary will then need to send an approval email to CBMS@finance.gov.au.</p>

Note: Whenever you need to change your access, the form needs to reflect the total access you require not just the changes from what you already have.

How do I submit the form?

Entity Users / Treasury Users / PNFC/PFC Users	Entity access requests require CFO authorisation. Select the Submit button on the CBMS Access Form to send the CBMS Service Centre. Finance will then seek authorisation from your Chief Finance Officer. It is the entity user's responsibility to ensure that the CFO approves the form in a timely manner. Ensure the form is submitted from the applicant's email address.
Finance / Administrator Users	Finance access forms must be submitted to the relevant Assistant Secretary for authorisation (enter your Assistant Secretary's email in the Assistant Secretary field then click the Submit button).

What happens when the User Request Form is submitted?

User request forms are logged as a service request by the Finance Service Centre. The CBMS Service Centre will then seek authorisation from your Chief Finance Officer.

Further information and Support

For more Fact Sheets, the CBMS Ledger and FAQs, register for [GovTEAMS](#) and join the CBMS Community.

If you have any questions or concerns please contact the CBMS Service Centre:

Email: CBMS@finance.gov.au

Phone: (02) 6215 2000 or 1800 089 197