

Funding Information Management System (FIMS)

FIMS: Maintain Contacts, Roles and Access

myID: Maintain Accounts

This information is to be used by organizations that currently have a myID business account and use FIMS. It is the organization's responsibility to manage and maintain organization and user access in myID/FIMS. This document outlines how to:

- [Add a New User to FIMS and myID](#)
- [Update User Profiles in FIMS and myID](#)
- [Maintain FIMS Access and Roles](#)
- [Promote or Demote myID Accounts](#)
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Add a New User to FIMS and myID

Adding new users is a two-step process which includes adding a FIMS Contact and creating a myID account. Both parts must be completed. For security purposes, it is best practice that each user has their own myID and FIMS account.

Who can add a new contact to FIMS?

- An Administrator, assigned Primary or Primary Delegate roles in FIMS can add contacts, assign, and change access and roles.

Who can add a new user to myID?

- An Administrator can create User and other Administrator accounts.
- If a contact is an Administrator in myID, they are automatically an Administrator in FIMS.

Add a FIMS Contact

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select Organization Profile on left menu.
- Select Contacts on top menu.
- Select Add New Contact.
- Complete fields: First Name*, Last Name*, Email* (this must be the same email address as used in creating the myID account), Subscribe to Notifications*, Title*, select Type of Access*, Phone, Fax, Other Phone (*=required field).
- Select Save Contact.

Add a myID Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List.
- Select Add Business Account.
- Complete fields: First Name*, Last Name*, Username*, Email address* (this must be the same email address as used in creating the FIMS contact), confirm Email Address. Select account type: User or Administrator (*=required field).
- Select Continue.
- The new user will receive an email with account details. The new user selects the link, enters their username and temporary password, and enters and confirms a new password.
- The new user can log into FIMS directly at fims.calgary.ca.

Update Profiles in FIMS and myID

A profile can be updated when contact information changes.

Who can update a contact profile in FIMS?

- A user can update their own profile.
- An Administrator, assigned Primary or Primary Delegate roles in FIMS can update another users profile.

Who can update a user profile in myID?

- A user can update their own profile.
- An Administrator can update another users profile in myID.

Update Own Profile in FIMS

- User logs into FIMS (fims.calgary.ca).
- Select My Profile on left menu.
- Select Edit My Profile.
- Update title, phone, fax or other phone fields. *
- Select Save My Profile.

* Name and Email Address is updated in the users myID account. See Update a Profile in myID below. MyID updates displays immediately and transfers to FIMS when the user logs out and back into FIMS.

Update Another Users Profile in FIMS

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select Organization Profile on left menu.
- Select Contacts on top menu.
- Select Contact to be updated.
- Update title, phone, fax or other phone fields. *
- Select Save Contact.

* Name and Email Address is updated in the users myID account. See Update Own or a Profile in myID below. MyID updates displays immediately and transfers to FIMS when the user logs into FIMS.

Update Own Profile in myID

- User logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Edit Profile.
- Update the required fields.
- Select Continue.

* MyID updates displays immediately. **Updated information will transfer to FIMS when the user logs out and back into FIMS.**

Update a Profile in myID

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List
- Locate user and select Make Changes.
- Selects Update Account.
- Select Proceed.
- Update the required fields. Name and email address can be updated in myID.
- Select Continue
- Select Close

* MyID updates displays immediately. **Updated information will transfer to FIMS when the user logs into FIMS.**

Maintain FIMS Access and Roles

Maintaining access allows an organization to manage who can view or enter or update information and Primary, Primary Delegate, Accounting and Board contacts in FIMS.



Who can change Access and Roles in FIMS?

An Administrator, assigned Primary or Primary Delegate roles in FIMS can change access and roles in FIMS.

Change Access:

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select the Organization Profile on left menu.
- Select Contacts on top menu.
- Select Contact to be updated.
- Change Access.
- Select Save Contact

Change Roles:

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select the Organization Profile on left menu.
- Select Contacts on top menu.
- For Primary, Accounting, and Board, select  **Change**.
- For Primary role, select a person from the drop-down menu.
- For the Primary Delegate, Accounting and Board roles, select  next to the name of the person being assigned to the role.
- Select Save.

Promote or Demote myID Accounts

Promoting a User account to an Administrator account allows the user to be able to open, update, and close accounts in myID and FIMS. If a user is an Administrator in myID, they will be an Administrator in FIMS. Demoting an Administrator account limits the users ability to open, update and close accounts in myID and FIMS.

Who can promote a myID User Account to an Administrator account?

There are two ways for a User account to be promoted to an Administrator account: a User would promote their account to an Administrator account, or an Administrator can promote any User account to an Administrator account.

Who can demote a myID Administrator Account to a User account?

- An Administrator can demote their own or other Administrator accounts to a User account.
- In FIMS, the demoted contact will still show that they are an Administrator.

Promote own User Account to an Administrator Account

- User logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Promote to Administrator. Confirms and Selects Promote again.
- An email is sent to the Business License registered primary email address for approval with a link.
- The registered primary contact selects the link and cancels or approves the request.
- An email is sent to the requester indicating approval of the account promotion.

An Administrator promotes other User Account to an Administrator Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List.
- Locate user and select Make Changes.
- Select Promote.

Administrator Demotes own Account to User Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Demote to business user.
- Select Demote.

Administrator Demotes other Administrator Account to User Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List.
- Locate user and select Make Changes.
- Select Demote.

Delete or Hide FIMS Contacts and Close myID Accounts

Delete or Hide a FIMS contact and close myID accounts when a user is no longer required to log into or use FIMS.

- If just the myID User or Administrator account is closed, the user cannot log into myID/FIMS.
- If just the FIMS contact is deleted or hidden, the user can log into myID/FIMS. They will not have access to any information.
- In FIMS, an Administrator account can be hidden when the Administrator account is demoted to a User account in myID and the user logs into FIMS to transfer the myID demotion.


Who can delete or hide FIMS Contacts?

An Administrator, assigned Primary or Primary Delegate roles in FIMS can delete or hide a contact.

Who can close myID User and Administrator accounts?

- An Administrator can close their own and other User and Administrator accounts.
- A User cannot close their own or other users accounts.
- Accounts can be reactivated later.

Delete or Hide a FIMS Contact

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select the Organization Profile on left menu.
- Select Contacts on top menu.
- Locate contact to be deleted.
- Review contact attributes: is the contact assigned a role? **Remove the role.** Does the contact have full or read access? **Change access to None.** Is the contact an Administrator? **In myID, demote the Administrator account to a User account (see [Promote or Demote myID Accounts](#) above).** **After the demotion the user logs into FIMS so the demotion can be transferred to FIMS.** *
- Select  on top right of contact card.
- Select Delete. If the Contact cannot be deleted because they are linked to a myID account, or an application or report, select Hide.

* If a user is no longer with the organization and is unable to log into FIMS to transfer the demotion, an Administrator can log into myID (myid.calgary.ca) and update the former staff's user profile with a new email address, log into myID with the former staff's username and select forgot password. A password reset email will be sent to the new email address. Reset the password and log into FIMS (fims.calgary.ca) so that the demotion is transferred. The FIMS Contact can now be Hidden.

Close a myID User or Administrator Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List. All Administrators and Users associated with the myID business account are listed.
- Locate user and select Make Changes.
- Select Close Account. The account will be marked closed.

Reactivate a Closed myID Account and Unhide a FIMS Contact

Reactivate both closed myID account and unhide or add FIMS Contact.

Who can unhide or add FIMS Contacts?

- An Administrator, assigned Primary or Primary Delegate roles in FIMS can delete or hide a contact.


Who can reactivate closed myID accounts?

- An Administrator can reactivate other User and Administrator accounts.

Reactivate a Closed myID User or Administrator Account

- Administrator logs into FIMS (fims.calgary.ca) and selects myID Account on left menu or logs directly into myID (myid.calgary.ca).
- Select Account on top menu.
- Select Manage Business Users List. All Administrators and Users associated with the myID business account are listed.
- Locate user and select Make Changes.
- Select Reactivate Account and ensures contact information is correct.
- Provides user with username and FIMS URL: fims.calgary.ca.

Unhide a Contact in FIMS

- Administrator, Primary or Primary Delegate logs into FIMS (fims.calgary.ca).
- Select the Organization Profile on left menu.
- Select Contacts on top menu.
- Change Show Hidden from No to Yes. To show hidden contacts *
- Locate contact to be unhidden.
- Select  and select Unhide.
- Confirm by selecting Unhide.
- Change Show Hidden from Yes to No. To show unhidden contacts.
- Review the contact attributes: is the contact to be assigned a role? **Add the role.** Does the contact have full or read access? **Change access.**

* If the contact does not show in hidden contacts, follow the above instructions to [Add a New User to FIMS](#).

Terms and Descriptions: FIMS

It is the organization's responsibility to manage and maintain organization and user access in myID/FIMS.

Item	Description
FIMS Information & Resources	<ul style="list-style-type: none"> FIMS URL: fims.calgary.ca About FIMS FIMS FAQ's FIMS Online Training For support contact: FIMS@calgary.ca
Contacts	<ul style="list-style-type: none"> Staff names and information added to FIMS. Contacts assigned Primary and Primary Delegate receive all email FIMS notifications. Contacts assigned Accounting roles receive finance-related email FIMS notifications. Default access is None. Access can be changed by contacts assigned as the Administrator, Primary or Primary Delegate. Assignment of roles can be changed by contacts assigned as the Administrator, Primary or Primary Delegate. If a contact has a User account in myID, they will be a contact in FIMS. If a contact has an Administrator account in myID, they will be Administrator in FIMS. Organizations are encouraged to have more than one person assigned as an Administrator.
Administrator	<ul style="list-style-type: none"> Log in and access myID and FIMS. The Administrator automatically has Full access to FIMS. Update own profile. Update organization profile, including organization details, mailing and street address, add contacts, and assign roles and access. Organizations are encouraged to have more than one person assigned as an Administrator. If a staff has an Administrator account in myID, they will be assigned as an Administrator in FIMS.
Assigned Role: Primary	<ul style="list-style-type: none"> Only one Contact can be assigned the Primary role in FIMS. The Primary role should be the main organization contact. The Primary role automatically has full access to FIMS. The Primary role can update the organization profile, including organization details, mailing and street address, add, delete and hide contacts, and assign roles and access. Receives all emailed FIMS notifications. The Primary role will be indicated on organization paper and email correspondence and funding agreements. The Primary Role in FIMS is not linked to the business license registered primary email address.
Assigned Role: Primary Delegate	<ul style="list-style-type: none"> There can be many Contacts assigned the Primary Delegate role in FIMS. The Primary Delegate is the person(s) who may act as a back-up to the Primary through co-directing, delegated duties, succession planning etc. The Primary Delegate role automatically have Full access to FIMS. The Primary Delegate role can update organization profile, including organization details, mailing and street address, add, delete and hide contacts, and assign roles and access. Receives all emailed FIMS notifications.
Assigned Role: Accounting	<ul style="list-style-type: none"> There can be many Contacts assigned the Accounting role in FIMS. All staff assigned the Accounting role receive all finance-related emailed FIMS notifications.
Assigned Role: Board	<ul style="list-style-type: none"> There can be many Contacts assigned the Board role in FIMS. Does not receive emailed FIMS notifications.
Access: None	<ul style="list-style-type: none"> Contacts are not able to view any information in FIMS. The Administrator, Primary and Primary Delegate roles can change access for any Contact.
Access: Read	<ul style="list-style-type: none"> Contacts can read all information in FIMS, including application, reports, financial reports and uploaded documents. The Administrator, Primary and Primary Delegate roles can change access for any Contact.
Access: Full	<ul style="list-style-type: none"> Contacts can read all information in FIMS. Contacts can complete and submit applications, reports, financial reports, upload and delete documents. The Administrator, Primary and Primary Delegate roles automatically have full access. The Administrator, Primary and Primary Delegate roles can change access for any Contact.

Terms and Descriptions: myID

It is the organization's responsibility to manage and maintain organization and user access in myID/FIMS.

Item	Description
myID Information & Resources	<ul style="list-style-type: none">About myID: www.calgary.ca/myid.htmlmyID Business Account FAQ's: www.calgary.ca/myid/business-account-faqs.htmlmyID support: call 311
User Account	<ul style="list-style-type: none">Log in and access myID and FIMS.Update own profile and change password.Promote User account to Administrator account. Requires approval from the Business Licensing registered primary contact.A person with a User account in myID, will have access and be a contact in FIMS. Assignment of roles and access is assigned by the Administrator, Primary or Primary Delegate roles in FIMS.
Administrator Account	<ul style="list-style-type: none">Log in and access myID and FIMS.Update own profile and change password.Create, update profiles, promote, demote, close and reactivate all User and Administrator accounts.Organizations are encouraged to have more than one staff have an Administrator account.If a staff has an Administrator account in myID, they will be assigned an Administrator role in FIMS.
Promote Account	<ul style="list-style-type: none">Promote User account to Administrator account. Requires approval from the Business Licensing registered primary contact.
Demote Account	<ul style="list-style-type: none">An Administrator can demote any myID administrator account.
Close Account	<ul style="list-style-type: none">An Administrator can close any User and Administrator accounts.
Reactivate Closed Account	<ul style="list-style-type: none">An Administrator can reactivate any User and Administrator closed accounts.

Terms and Descriptions: Business Licensing & Registration

It is the organization's responsibility to maintain the Registered Primary Contact.

Item	Description
Business Licensing Information	<ul style="list-style-type: none">Call Business License & Registration 403-268-5311In person at Planning Services Centre located on the 3rd floor of the Calgary Municipal Building, 800 Macleod Trail SE
Registered Primary Contact	<ul style="list-style-type: none">The registered primary contact approves Business Administrator accounts.To register your organization's primary contact call 403-268-5311.The primary contact should belong to an authority in the organization who manages business-related requests.The registered primary contact is not linked to the FIMS Primary role.