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# USDA User Profile Guidance

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Step-by Step  
Instructions for  
Creating/Modifying  
Coordinators &  
Approving Officials  
Information

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USDA OPPM Charge Card  
Service Center

Originated March 2009

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This guide was developed with the assistance of US Bank to provide Coordinators with step-by-step instructions to create/modify user ids for LAPCs and Approving Officials (AO)s. APCs have the capability to create/modify user ids for LAPCs. LAPCs have the capability to create/modify user ids for AOs.

This quick reference guide is to be used together with the User Profile User Guide found on <https://wbt.access.usbank.com>. Additional questions about this guidance should be directed to the USDA OPPM Charge Card Service Center at [ccsc@da.usda.gov](mailto:ccsc@da.usda.gov).

## USDA User Profile Step-by-Step (Setting Up A New User)

The screenshot shows the 'U.S. Bank Access Online' interface. At the top right, it says 'Personal | Business | Institution / Government | About U.S. Bancorp' and 'ACME16 Agency'. The left sidebar contains a menu with categories: 'Request Status Queue', 'Active Work Queue', 'System Administration' (highlighted), 'Account Administration', 'Order Management', 'Transaction Management', 'Travel Expense Management', 'Data Exchange', 'Account Information', 'Reporting', and 'My Personal Information'. Under 'System Administration', 'User Profiles' is selected. The main content area is titled 'User Profiles' and 'User Setup and Search'. It includes a 'Search' button and input fields for 'User ID', 'User Last Name', and 'Account Number'. Three yellow callout boxes provide instructions: 1) 'Select System Administration', 2) 'Select User Profile', and 4) 'Select "Setup a new user" to create a new user ID. Prior to setting up user, run an "Account List Report" to determine if a cardholder exists at that level or use Account Administration to search for specific cardholder. If cardholder exists, you can set up user at that level. If not, submit the Reporting Hierarchy Setup Form as indicated on the form.' A third callout box points to the 'Search' button: '3) Search for prospective user by name to determine if user ID exists. If name appears, go to step 6. If not, go to step 4.'

- **User Profile gives USDA APC/LAPC/LFPCs the ability to setup new user IDs for APCs/LAPCs/LFPCs/AOs that sit below them in their hierarchy real time in Access Online**
- **Simply log in to Access Online, select System Administration, select User Profile, and begin**
- **Prior to using the feature to “setup a new user”, use the “Search” function to determine if the requested user has an existing user profile. Enter the user’s last name; then click “Search”. If the user’s name appears in the list as an LAPC/APC (PAGC\_APC-LAPC) or AO (PAGC-AO4), then click on the name and perform applicable edits.**

## Setting Up A New User Cont'd

**5) Enter the required fields on the screen.**

**Continued on following page.**

**User Profiles**  
Manage Login Information

Enter the user login information.

User Type: Client User      User Access Status:\*  
Active

\* = required

Last Name:\*      First Name:\*      MI:  
Example      USDAO     

User ID:\* (7 to 20 alpha-numeric characters)  
USDAOEXAMPLE

Data Exchange Batch Script

Password:\* (8 to 20 alpha-numeric characters OR  
12 to 20 alpha-numeric characters for Data Exchange Batch Script)  
.....

Re-enter Password:\*  
.....

Authentication Question:\*  
Pet's Name

Authentication Response:\*  
Spot

Functional Entitlement Group:\*  
Hold down the Ctrl key to make multiple selections  
CH Full      View Functional Entitlement Group detail

- **Fill out the required fields on the first screen to set up log-in information**
- **Required fields are indicated with a red asterisk (\*)**

## Setting Up A New User Cont'd

The screenshot shows a web form for setting up a new user. On the left is a blue navigation menu with links: Travel Expense Management, Data Exchange, Account Information, Reporting, My Personal Information, Home, and Contact Us. The main form area contains the following fields and options:

- User ID:** (7 to 20 alpha-numeric characters) with the value "USDAAOEXAMPLE" entered.
- Data Exchange Batch Script
- Password:** (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script) with masked characters "••••••••".
- Re-enter Password:** with masked characters "••••••••".
- Authentication Question:** with a dropdown menu showing "Pet's Name".
- Authentication Response:** with the value "Spot" entered.
- Functional Entitlement Group:** with a note "Hold down the Ctrl key to make multiple selections" and a list box containing "CH Full", "PA Admin", and "PA Finance". A link "View Functional Entitlement Group detail" is present with the instruction "Select only one group at a time to view detail."
- Accounting Code View:** with a dropdown menu showing "1".
- 
- [<< Back to User](#)

Three callout boxes provide additional instructions:

- Yellow callout (left):** "ONLY use Accounting Code View 1 for USDA user IDs"
- Orange callout (bottom center):** "When finished, hit 'save'"
- Yellow callout (right):** "Please refer to the FEG matrix on the User Profile Setup and Maintenance Overview or see below to assign the correct FEG to the user that you wish to create"

At the bottom of the page, there is a footer: "© 2009 U.S. Bancorp" on the left and "usb demo1" on the right.

USDA FEGs to be utilized in User Profile	User Type	Description
PAGC_APC-LAPC	USDA specific APC FEG	Account Setup and Maintenance, Transaction Management and Allocation, Fleet reporting
PAGC_AO4	USDA specific AO FEG	No Account Setup and Maintenance, no allocation and limited reporting
PAGC_RPT	Reporting only FEG	Standard reporting
PAGC_AO2	View only APC FEG	View only: Account Administration, Transaction Management and Standard reporting

### FEG matrix

- **For Purchase program use:**
  - **PAGC\_APC-LAPC (LAPC/APC),**
  - **PAGC\_AO4 (AO),**
  - **PAGC\_RPT,**
  - **PAGC\_AO2 (Financial POC)**

## Setting Up A New User Cont'd

**Request Status Queue**  
**Active Work Queue**  
**System Administration**  
User Profiles  
Financial Extract Controls  
Accounting Code Mgmt  
Merchant Groups  
Merchant Allocation Rules  
Allocation Rules Engine  
Global Affiliate Groups

**Account Administration**  
**Order Management**  
**Transaction Management**  
**Travel Expense Management**  
**Data Exchange**  
**Account Information Reporting**  
**My Personal Information**

Home  
Contact Us

**User Profiles**  
**User Profile Summary**  
Example, USDAO

**Login Information** [Edit](#)  
**Last Name:** Example  
**First Name:** USDAO  
**MI:**  
**Organization Short Name:** ACAG16  
**User ID:** USDAOEXAMPLE  
**User Access Status:** Active  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1  
**Functional Entitlement Group(s):** PA Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designation
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**Hierarchy Assignments**

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

**Contact Information** [Edit](#)  
**Address 1:**  
**Address 2:**  
**City:**  
**State/Province:**  
**Zip/Postal Code:**  
**Phone Number:**  
**Fax Number:**  
**Email Address:**  
**Other:**  
**Email Notification:** Statement Notification

**6) Select View/Add processing hierarchy next. You will want to add the equivalent reporting hierarchy as well**

- After clicking “Save”, you are brought to this screen
- You should see the user ID log-in information that you set up at the top of the screen
- Next step, add processing hierarchy to the user ID

## Setting Up A New User Cont'd

The screenshot shows the 'User Profiles' section of the USDA system. The left sidebar contains navigation links such as 'Request Status Queue', 'Active Work Queue', 'System Administration', 'Account Administration', 'Order Management', 'Transaction Management', 'Travel Expense Management', 'Data Exchange', 'Account Information', 'Reporting', and 'My Personal Information'. The main content area is titled 'User Profiles' and 'Select a Processing Hierarchy Position'. It includes a search form with fields for 'Hierarchy Level' (set to 'Agent'), 'Bank', 'Agent', 'Company', 'Division', and 'Department'. A 'Search' button is present. Below the search form, there is a table of 'Found Hierarchy Position(s)' with columns for 'Select', 'Bank', 'Agent', 'Comp', 'Div', and 'Dept'. One record is shown with values '3059' and '0073'. To the right, there is a 'Selected Hierarchy Position(s)' section with a 'Remove' button and a message 'no hierarchy position(s) selected.'. A yellow callout box points to the search area with the text: '7) Search for processing hierarchy using any known or partial values.'

- **Search for the hierarchy that you wish to link to this user ID**
  - **APCs usually require one or multiple agent levels (level 4s)**
  - **LAPCs usually require one or multiple company levels (level 5s)**
  - **AOs usually require one or multiple division or department levels (level 6 or 7s)**

## Setting Up A New User Cont'd

**8) Select position to add hierarchy**

**When finished, hit "Accept Hierarchy"**

- Place a check mark in the box to the left of the hierarchy you wish to link to the user
- Click on the button, "Select position"
- It should then appear on the right side of the screen under "Selected Hierarchy position"
- Click on the button, "Accept Hierarchy"

## Setting Up A New User Cont'd

**9) Search for reporting hierarchy using any known or partial values.**

**Found Hierarchy Position(s)**  
Records 1 - 2 of 2

Select	Bank	Lv 1	Lv 2	Lv 3	Lv 4	Lv 5	Lv 6	Lv 7
<input type="checkbox"/>	3059	64913	22222	33333	44444	55555		
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555		

[Check All Shown](#) | [Uncheck All Shown](#)

- Use the same process for reporting hierarchy
- Search for the levels that you wish to link to the user

## Setting Up A New User Cont'd

The screenshot shows the 'Hierarchy Level' dropdown set to 'Level 5'. Below it are input fields for Bank, Level 1 through Level 7. A 'Search' button is present. A text block explains: 'To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Position". To remove a selected position from the list, mark the position in the list to the right and click "Remove Position". When you are satisfied with your selection(s), click "Accept Hierarchy".'

**Found Hierarchy Position(s)**  
Records 1 - 2 of 2

Select	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5	Lvl 6	Lvl 7
<input type="checkbox"/>	3059	64913	22222	33333	44444	55555		
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555		

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 2 of 2

**Selected Hierarchy Position(s)**

Remove	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4
<input type="checkbox"/>	3059	64913	22222	33333	44444

**10) Select position to add hierarchy**

**11) When finished, hit "Accept Hierarchy"**

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- **Select them with a check mark**
- **Accept the hierarchy**
- **You may also remove hierarchy from a user**
  - **Place a check mark in the hierarchy you wish to remove**
  - **Click on the button, "Remove position"**
  - **Accept Hierarchy**
- **Note: Remember to add new hierarchy to a user before removing old hierarchy. If a user ID has all hierarchy removed you will lose the ability to maintain that user because he/she is no longer tied to your own hierarchy.**
- **See page 15 to remove a user ID altogether**

## Setting Up A New User Cont'd

Personal | Business | Institution / Government | About U.S. Bancorp

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★ Log Out

**User Profiles**

**User Profile Summary**  
Example, USDAAO

**Login Information** [Edit](#)

**Last Name:** Example  
**First Name:** USDAAO  
**MI:**

**Organization Short Name:** ACAG16  
**User ID:** USDAAOEXAMPLE

**User Access Status:** Active  
**Transaction Approval Manager:** No  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1  
**Functional Entitlement Group(s):** PA.Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID
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**Hierarchy Assignments**

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

- To enable a user as an approval manager (purchase APCs, LAPCs, AOs), click the login information edit link after linking hierarchy to the user ID
- By selecting the Approval Manager box, cardholders will be able to select and send approved transactions to this user for Final Approval

## Setting Up A New User Cont'd

The screenshot shows a web form for creating a new user. On the left is a blue navigation menu with links like 'Financial Extract Controls', 'Accounting Code Mgmt', 'Merchant Groups', 'Merchant Allocation Rules', 'Allocation Rules Engine', 'Global Affiliate Groups', 'Account Administration', 'Order Management', 'Transaction Management', 'Travel Expense Management', 'Data Exchange', 'Account Information', 'Reporting', 'My Personal Information', 'Home', and 'Contact Us'. The main form area is titled 'Enter the user login information.' and contains the following fields:

- User Type:** Client User
- User Access Status:** Active (dropdown menu)
- Last Name:** Example
- First Name:** USDAO
- MI:** (empty)
- User ID:** (7 to 20 alpha-numeric characters) USDAOEXAMPLE
- Password:** (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script)
- Re-enter Password:** (empty)
- Authentication Question:** Pet's Name (dropdown menu)
- Authentication Response:** Spot
- Transaction Approvals:**  Approval Manager
- Functional Entitlement Group:** (dropdown menu with options: CH Full, PA Admin, PA Finance)
- Accounting Code View:** 1 (dropdown menu)

Two callouts are present:

- A yellow callout box with a pointer to the 'Approval Manager' checkbox, containing the text: **13) Place a check mark here if you wish to enable your user as an approval manager**
- An orange starburst callout pointing to the 'View Functional Entitlement Group detail' link, containing the text: **14) Click "save" when**

- After placing the check mark in the Approval Manager box, click “save”

## Setting Up A New User Cont'd

The screenshot shows a user profile page with a dark blue sidebar on the left containing navigation links: Global Affiliate Groups, Account Administration, Order Management, Transaction Management, Travel Expense Management, Data Exchange, Account Information, Reporting, My Personal Information, Home, and Contact Us. The main content area displays user details: First Name: [REDACTED], MI: [REDACTED], Organization Short Name: ACAG16, User ID: USDAOEXAMPLE, User Access Status: Active, Transaction Approval Manager: Yes, Date Created: 02/13/2009, Created By: pa1agency, Date Last Changed: 02/13/2009. It also shows Account Assignments, Hierarchy Assignments (with links for View/Add Processing Hierarchy and View/Add Reporting Hierarchy), and Contact Information (with an Edit link). A yellow callout box with a black border and arrow points to the 'View/Add Reporting Hierarchy' link, containing the text: '15) Click here to add address, email, and email notification information'. Below the contact information is a link: '<< Back to User Profile Home'. The footer contains '© 2009 U.S. Bancorp' and 'usb demo1'.

Global Affiliate Groups  
Account Administration  
Order Management  
Transaction Management  
Travel Expense Management  
Data Exchange  
Account Information  
Reporting  
My Personal Information

Home  
Contact Us

First Name: [REDACTED]  
MI: [REDACTED]  
Organization Short Name: ACAG16  
User ID: USDAOEXAMPLE  
User Access Status: Active  
Transaction Approval Manager: Yes  
Date Created: 02/13/2009  
Created By: pa1agency  
Date Last Changed: 02/13/2009

User Authentication Category: Pet's Name  
Accounting Code View: 1  
Functional Entitlement Group(s): PA Admin

Account Assignments [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID
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Hierarchy Assignments

- [View/Add Processing Hierarchy](#)
- [View/Add Reporting Hierarchy](#)

15) Click here to add address, email, and email notification information

Contact Information [Edit](#)

Address 1: 1025 Connecticut Ave  
NW  
Address 2:  
City: Washington  
State/Province: DC  
Zip/Postal Code: 20036  
Country: United States

Phone Number: 202-555-1122  
Fax Number:  
Email Address: usdaao@usda.example.gov  
Other:  
Email Notification: Data Exchange  
Pending Transaction Approval  
Statement Notification

[<< Back to User Profile Home](#)

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- **Select the Contact Information edit link to add the address, email, and email notification detail**

## Setting Up A New User Cont'd

The screenshot shows a web form for setting up a new user. On the left is a blue navigation menu with links like 'Financial Extract Controls', 'Accounting Code Mgmt', 'Merchant Groups', 'Merchant Allocation Rules', 'Allocation Rules Engine', 'Global Affiliate Groups', 'Account Administration', 'Order Management', 'Transaction Management', 'Travel Expense Management', 'Data Exchange', 'Account Information', 'Reporting', 'My Personal Information', 'Home', and 'Contact Us'. The main form area is titled 'Example, USDAAO' and contains the following fields:

- 'Enter the user contact information.' with a note '\* = required'.
- 'Last Name:\*' (Example), 'First Name:\*' (USDAAO), and 'MI:' (empty).
- 'Address 1:\*' (1025 Connecticut Ave NW) and 'Address 2:' (empty).
- 'City:\*' (Washington), 'State/Province:\*' (DC), and 'Zip/Postal Code:\*' (20036).
- 'Country:\*' (United States).
- 'Phone Number:\*' (202-555-1122) and 'Fax Number:' (empty).
- 'Email Address:\*' (usdaao@usda.example.gov) and 'Other:' (empty).

Below the form is an 'Email Notification' section with two options:

- Data Exchange**: Hold down the Ctrl key to make multiple selections. A dropdown menu is open showing: All, Successful Upload, Unsuccessful Upload, Successful Download, Unsuccessful Download.
- Pending Transaction Approval**:  Daily

Two yellow callout boxes provide instructions:

- Box 1: '16) Enter required information as indicated by red asterisk.' with an arrow pointing to the asterisks in the form fields.
- Box 2: 'Select information as indicated on page.' with arrows pointing to the 'Data Exchange' checkbox and the dropdown menu.

- **Fill in the required fields indicated with a red asterisk (\*)**
- **Select Data Exchange to allow users to schedule reports and when to be notified by email if a report is populated for the user**

## Setting Up A New User Cont'd

**Email Notification**

**Data Exchange**  
 Hold down the Ctrl key to make multiple selections.

**All**  
 Successful Upload  
 Unsuccessful Upload  
 Successful Download  
 Unsuccessful Download

**Pending Transaction Approval**

Daily

Weekly: **Wednesday**

Send notification only when there are transactions to approve.

**Statement Notification**

Select accounts below to receive email notification when a statement is available in Access Online.

Accounts associated directly to this user id:

Status	Account Number	Account Name	Account Type

Accounts viewed through associated hierarchies: [Add Managing Accounts](#)  
[Add Cardholder Account](#)

**Remove Account** **Account Type**

**Save**

**Select information as indicated on this page.**

**Click "save" when finished**

- **Select “Pending Transaction Approval” to enable email notification when an approved transaction awaits the user’s final approval in their Approval Manager Queue**
- **Select when the user should be notified of approved transactions in their queue**
  - **The default selection for USDA is weekly on Wednesdays**
- **Ignore statement notification for all product lines**
- **Hit “save”.**

## Setting Up A New User Cont'd

Global Affiliate Groups

**Account Administration**

Order Management

Transaction Management

Travel Expense Management

Data Exchange

Account Information

Reporting

My Personal Information

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Home

Contact Us

**First Name:** GORVW  
**MI:**

**Organization Short Name:** ACAG18  
**User ID:** USDAOEXAMPLE

**User Access Status:** Active  
**Transaction Approval Manager:** Yes  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1

**Functional Entitlement Group(s):** PA Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID
Hierarchy Assignments				
<ul style="list-style-type: none"> <li><a href="#">View/Add Processing Hierarchy Assignments</a></li> <li><a href="#">View/Add Reporting Hierarchy Assignments</a></li> </ul>				

**Contact Information** [Edit](#)

**Address 1:** 1025 Connecticut Ave NW  
**Address 2:**  
**City:** Washington  
**State/Province:** DC  
**Zip/Postal Code:** 20036  
**Country:** United States

**Phone Number:** 202-555-1122  
**Fax Number:**  
**Email Address:** usdaao@usda.example.gov  
**Other:**  
**Email Notification:** Data Exchange  
Pending Transaction Approval  
Statement Notification

[<< Back to User Profile Home](#)



- You will now see the User Profile Summary screen with your updates to the contact information**
- Unless you need to maintain something, your request is complete and the user ID is created and ready to be used**
- Note: Approval Manager updates load overnight***

# Removing a User ID

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**U.S. Bank Access<sup>®</sup> Online**

★ Log Out

**Request Status Queue**  
**Active Work Queue**  
**System Administration**  
User Profiles  
Financial Extract Controls  
Accounting Code Mgmt  
Merchant Groups  
Merchant Allocation Rules  
Allocation Rules Engine  
Global Affiliate Groups

**Account Administration**  
**Order Management**  
**Transaction Management**  
**Travel Expense Management**  
**Data Exchange**  
**Account Information Reporting**  
**My Personal Information**

Home  
Contact Us

### User Profiles

#### User Profile Summary

Example, USDAAO

**Login Information** [Edit](#)

**Last Name:** Example  
**First Name:** USDAAO  
**MI:**

**Organization Short Name:** ACAG16  
**User ID:** USDAAOEXAMPLE

**User Access Status:** Active  
**Transaction Approval Manager:** Yes  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1  
**Functional Entitlement Group(s):** PA Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID
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#### Hierarchy Assignments

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

- To remove a user ID, search for the user by user ID or name
- Click on the login information edit link

**User Profiles**  
Manage Login Information

Enter the user login information.

**User Type:** Client User

\* = required

**User Access Status:\***  
 Removed  
 Active  
 Inactive  
 Removed

Last Name: \* [Example] First Name: \* [USDAAO] MI: [ ]

User ID: \* (7 to 20 alpha-numeric characters)  
[USDAAOEXAMPLE]

Password: \* (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script)  
[ ]

Re-enter Password: \*  
[ ]

Authentication Question: \*  
[Pet's Name]

Authentication Response: \*  
[Spot]

Transaction Approvals  Approval Manager

Functional Entitlement Group: \*  
Hold down the Ctrl key to make multiple selections  
[CH Full]

- Select “Removed” from the drop-down box under User Access Status to remove a user
- You may also choose to make a user “inactive” if you do not wish to permanently remove the user ID
  - A user cannot log-in to Access Online if their status is “inactive”
- Click on “save” and your request is completed

*For further questions contact customer service, the technical helpdesk, or your account coordinator*