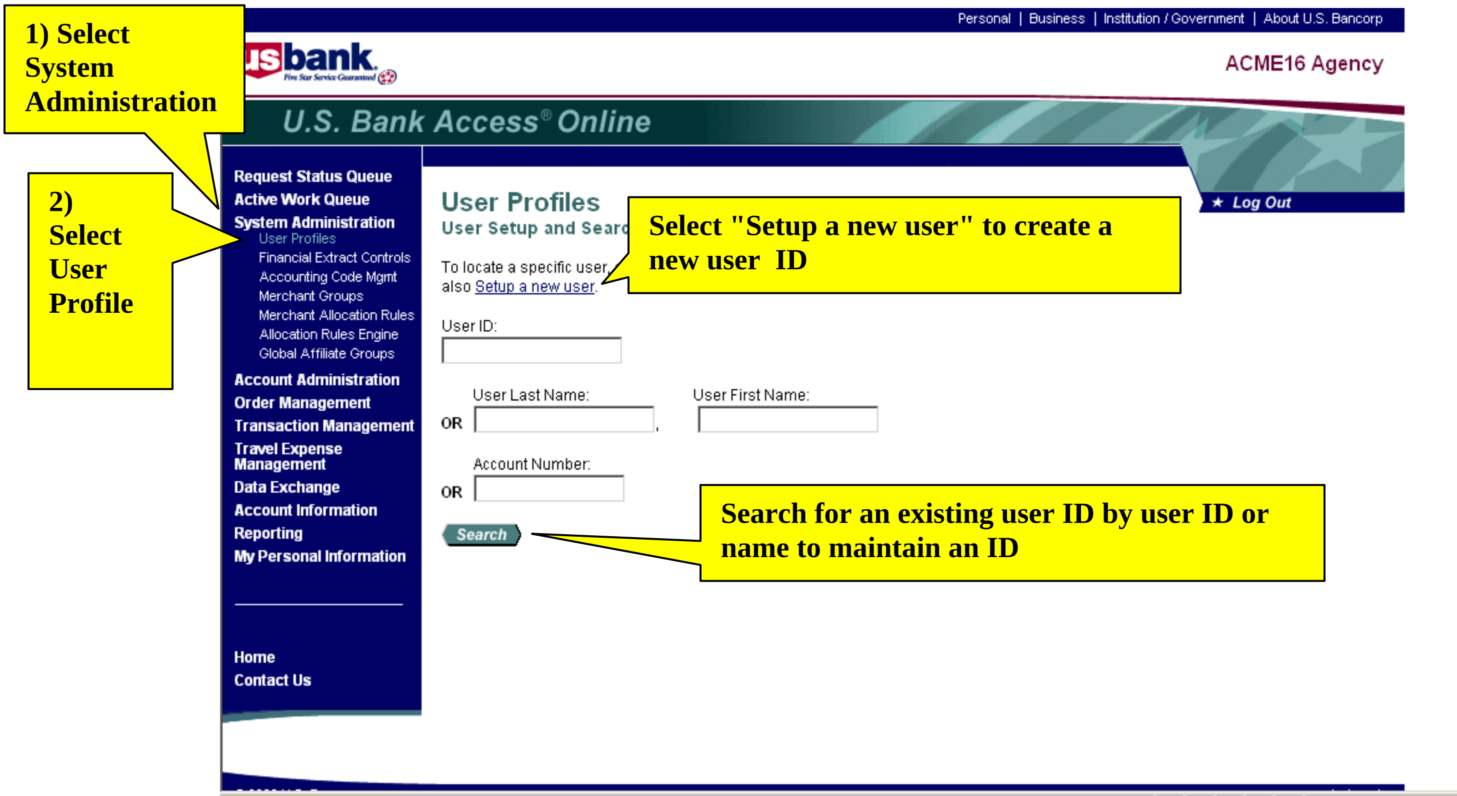
USDA User Profile Step-by-step

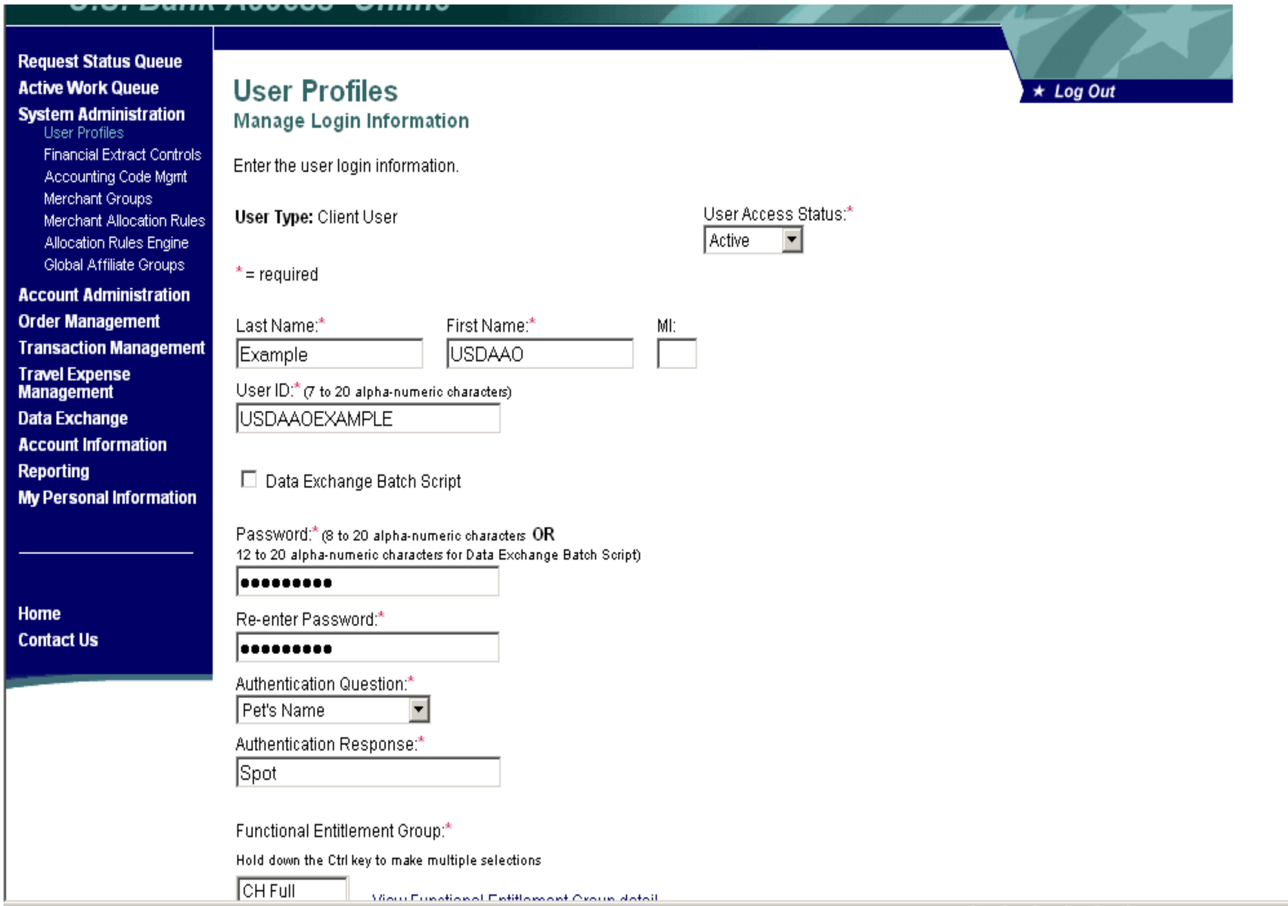
(To be used together with the User Profile user guide found on https://wbt.access.usbank.com)



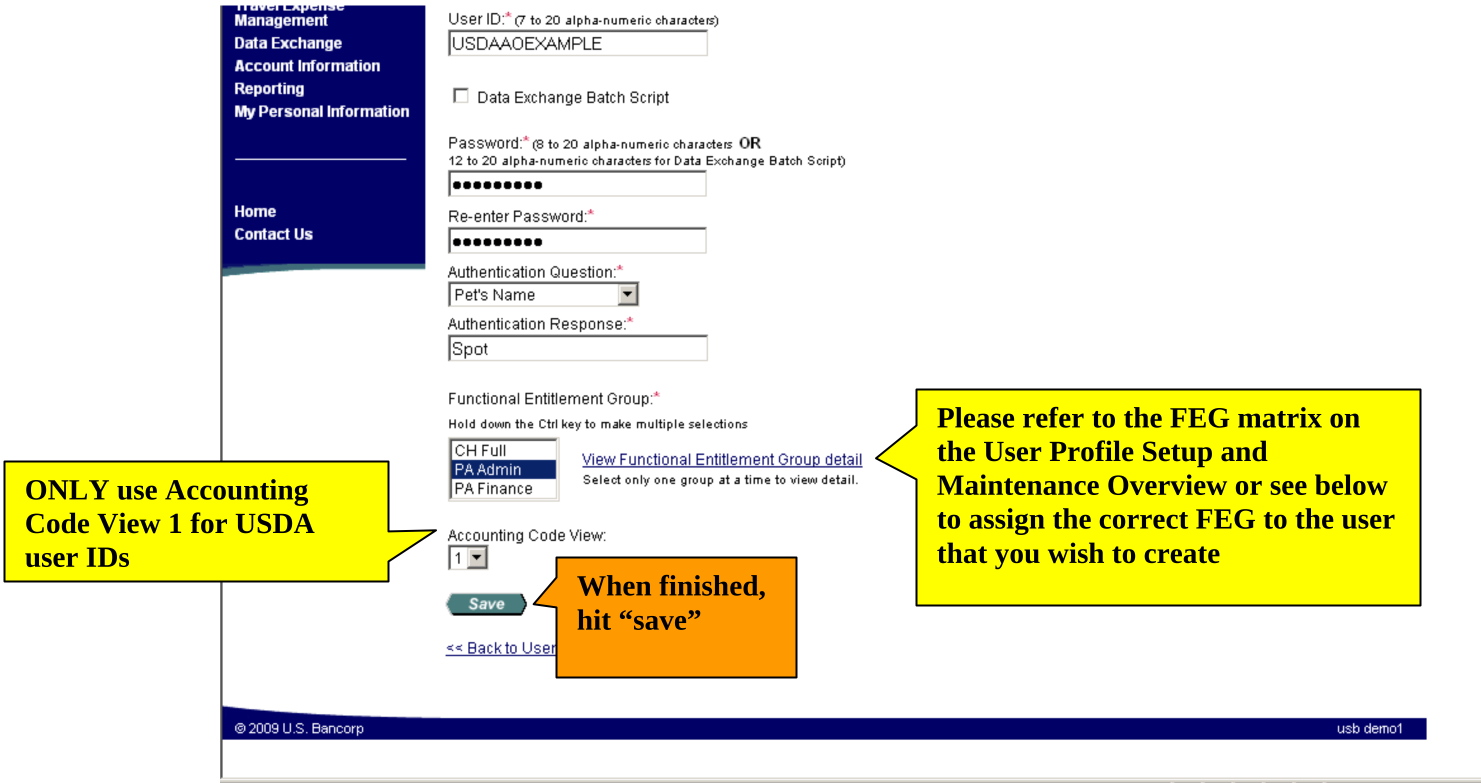
- **User Profile gives USDA APC/LAPC/LFPCs the ability to setup new user IDs for APCs/LAPCs/LFPCs/AOs that sit below them in their hierarchy real time in Access Online**

- **Simply log in to Access Online, select System Administration, select User Profile, and begin**

Creating a new user ID



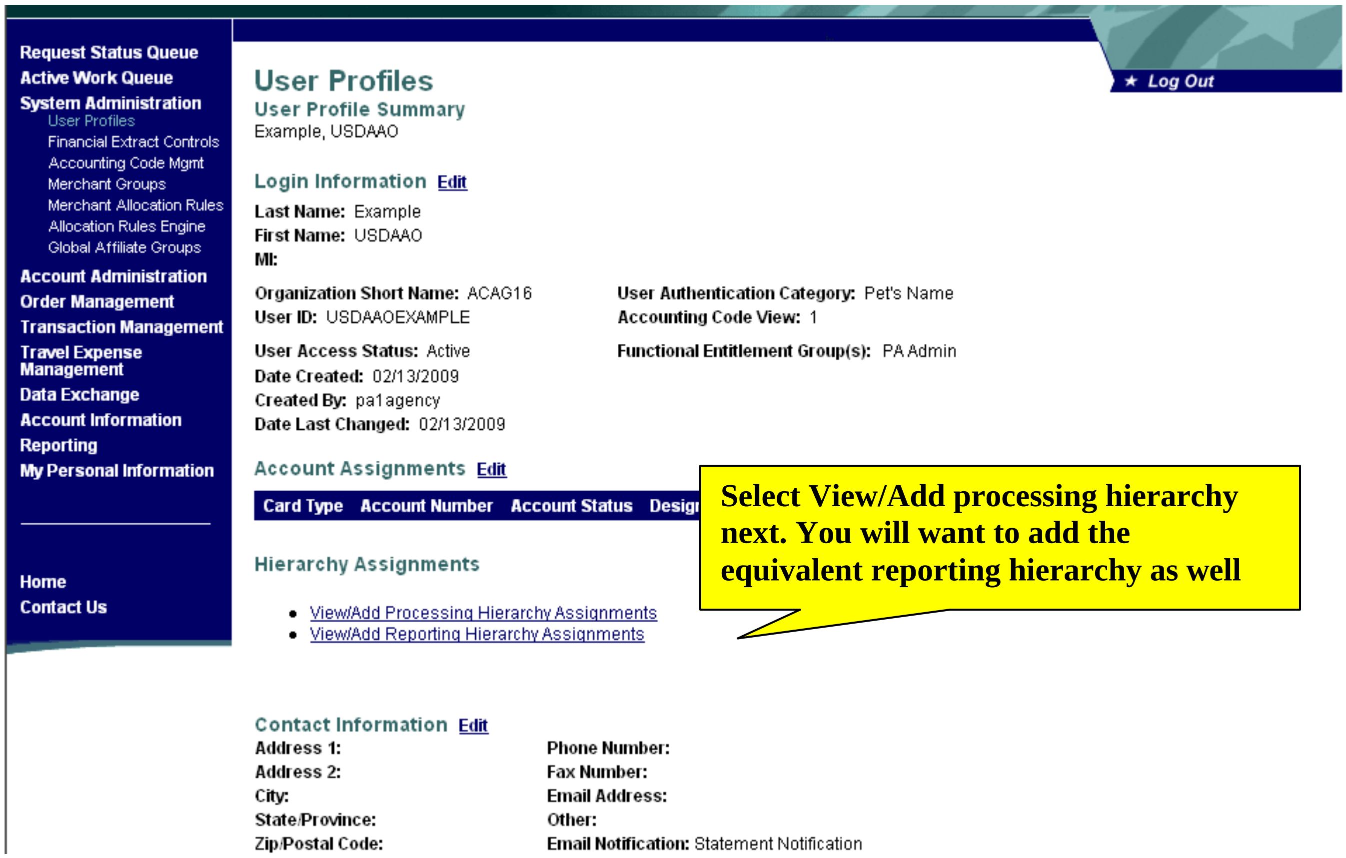
- **Fill out the required fields on the first screen to set up log-in information**
- **Required fields are indicated with a red asterisk (*)**



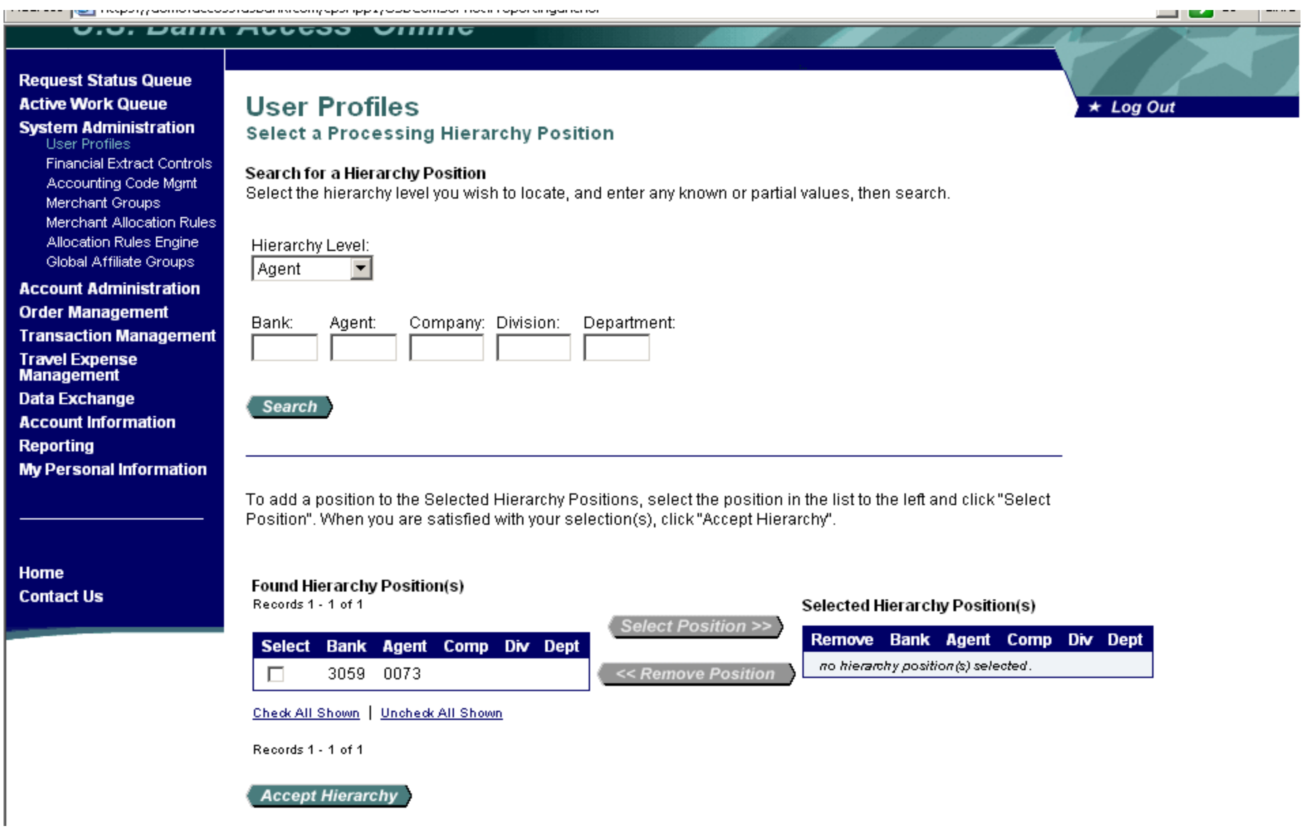
FEG matrix

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
SET_UP_AND_MAINT_FLEET_VEHICLE_AND_DRIVER	Fleet FEG1	Required for fleet users
SET_UP_AND_MAINT_CH_ACCT_FLEET_INFO	Fleet FEG2	Required for fleet users
Fleet_reporting	Fleet FEG3	Fleet reporting

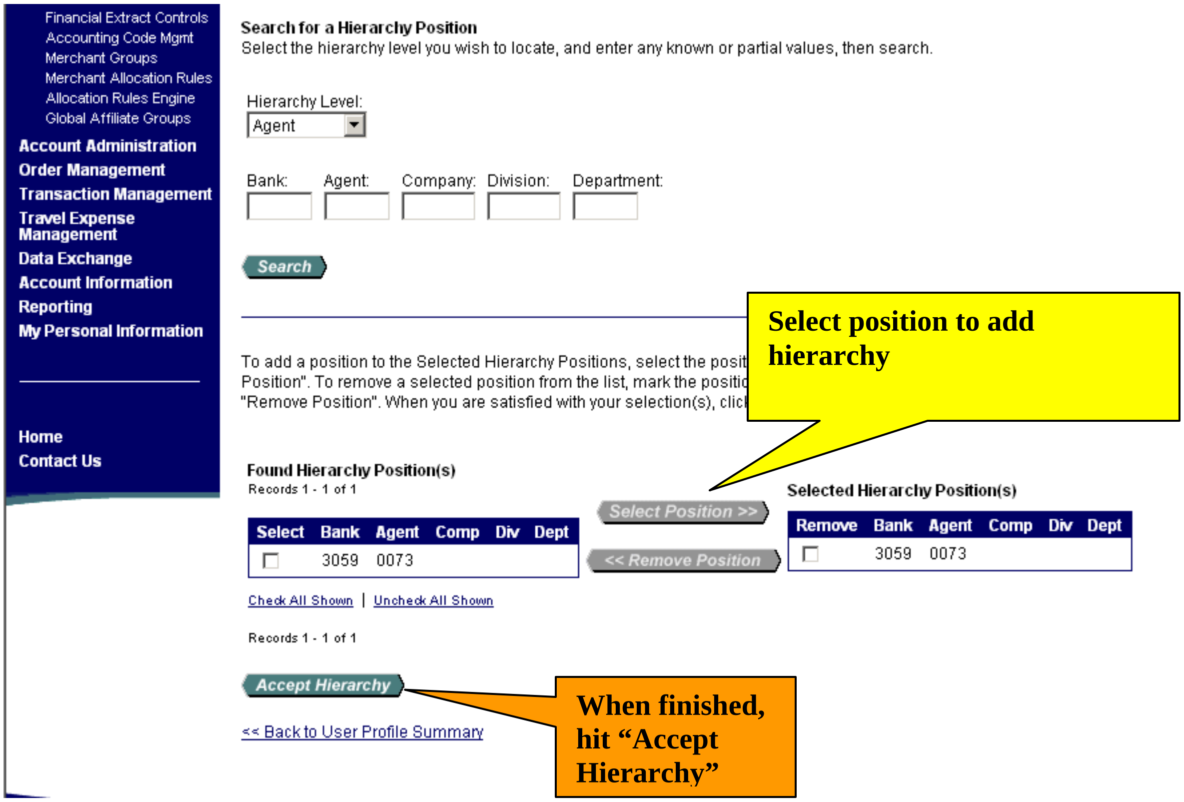
- **Purchase program can use PAGC_APC-LAPC,PAGC_AO4, PAGC_RPT, PAGC_AO2**
- **Travel program can use PAGC_APC-LAPC, PAGC_RPT, PAGC_AO2**
- **Fleet program requires three FEGs for each AFPC or LFPC:**
  - **PAGC_APC-LAPC**
  - **SET_UP_AND_MAINT_FLEET_VEHICLE_AND_DRIVER**
  - **SET_UP_AND_MAINT_CH_ACCT_FLEET_INFO**
  - **Optional for fleet reporting only: Fleet_reporting**



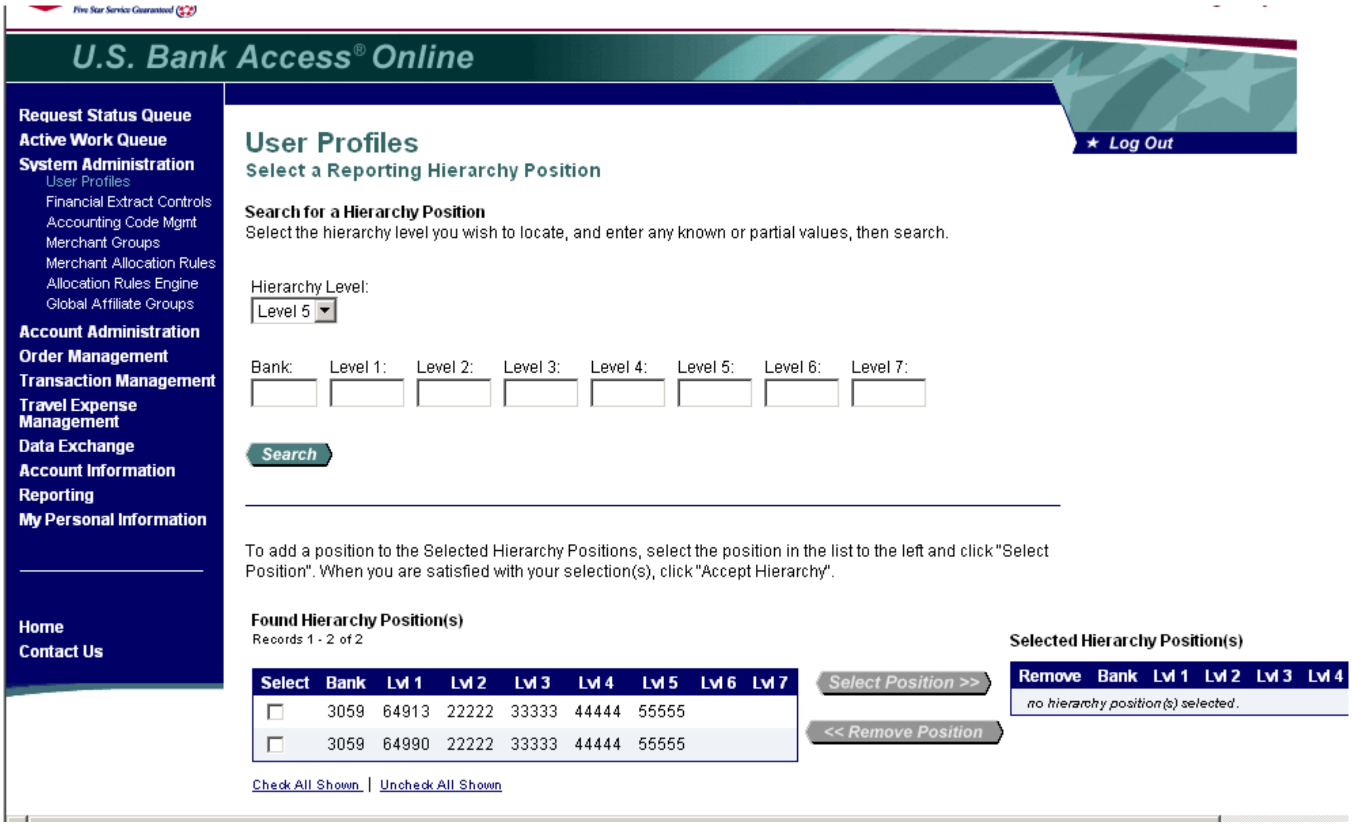
- **Click on "Save" and you are brought to this screen**
- **You should see the user ID log-in information that you set up at the top of the screen**
- **Next step, add processing hierarchy to the user ID**



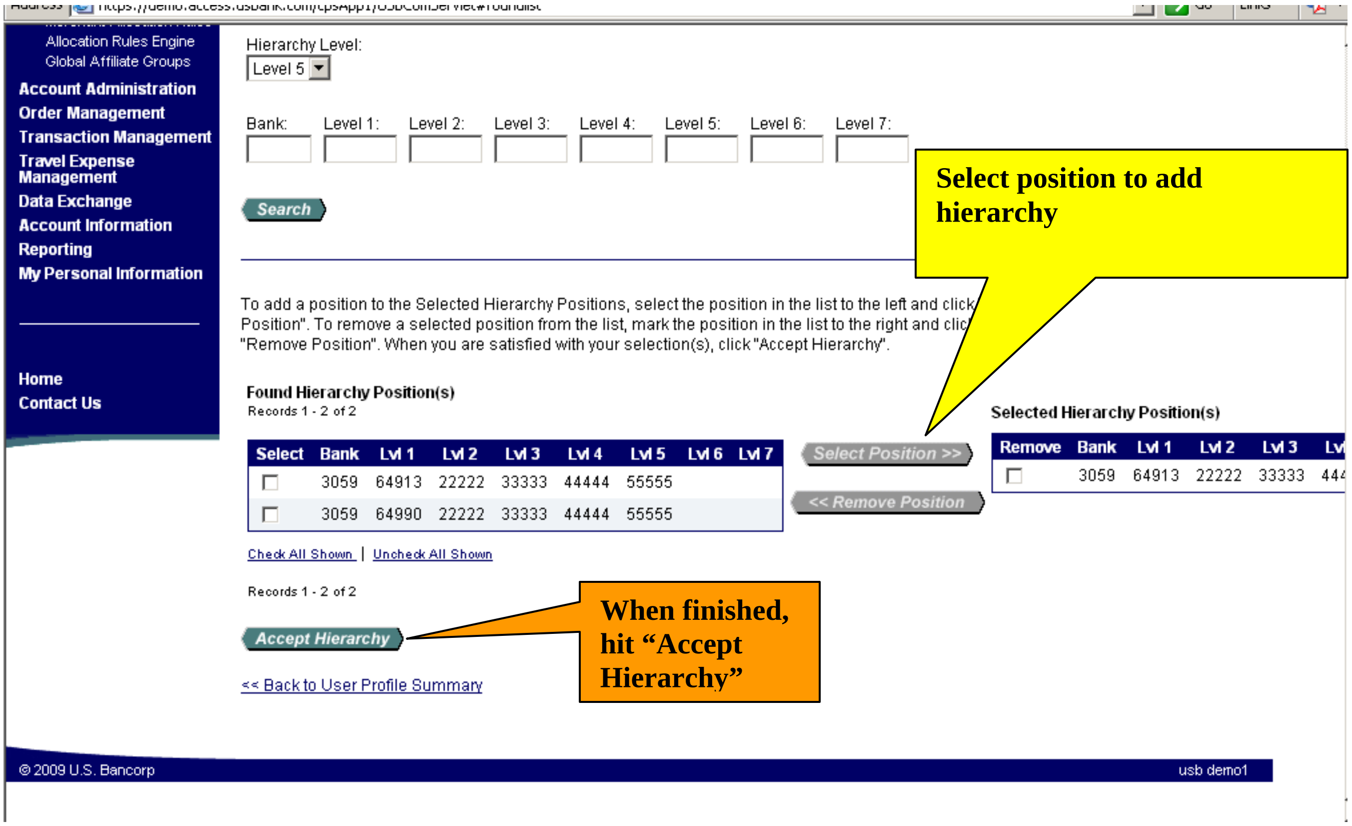
- **Search for the hierarchy that you wish to link to this user ID**
    - **APCs usually require one or multiple agent levels (level 4s)**
    - **LAPCs/LFPCs usually require one or multiple company levels (level 5s)**
    - **AOs usually require one or multiple division or department levels (level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



- **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"**

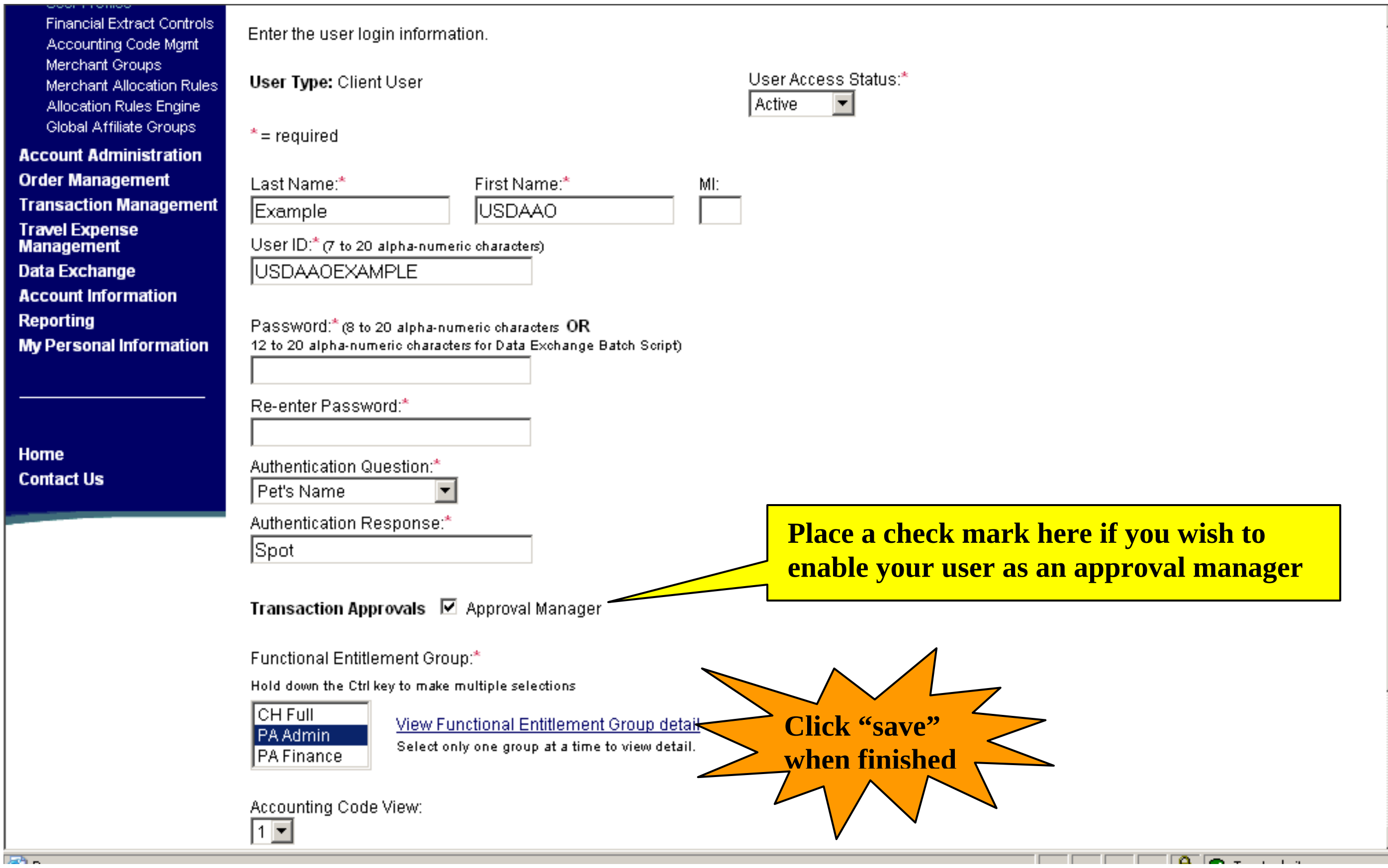


- **Use the same process for reporting hierarchy**
- **Search for the levels that you wish to link to the user**

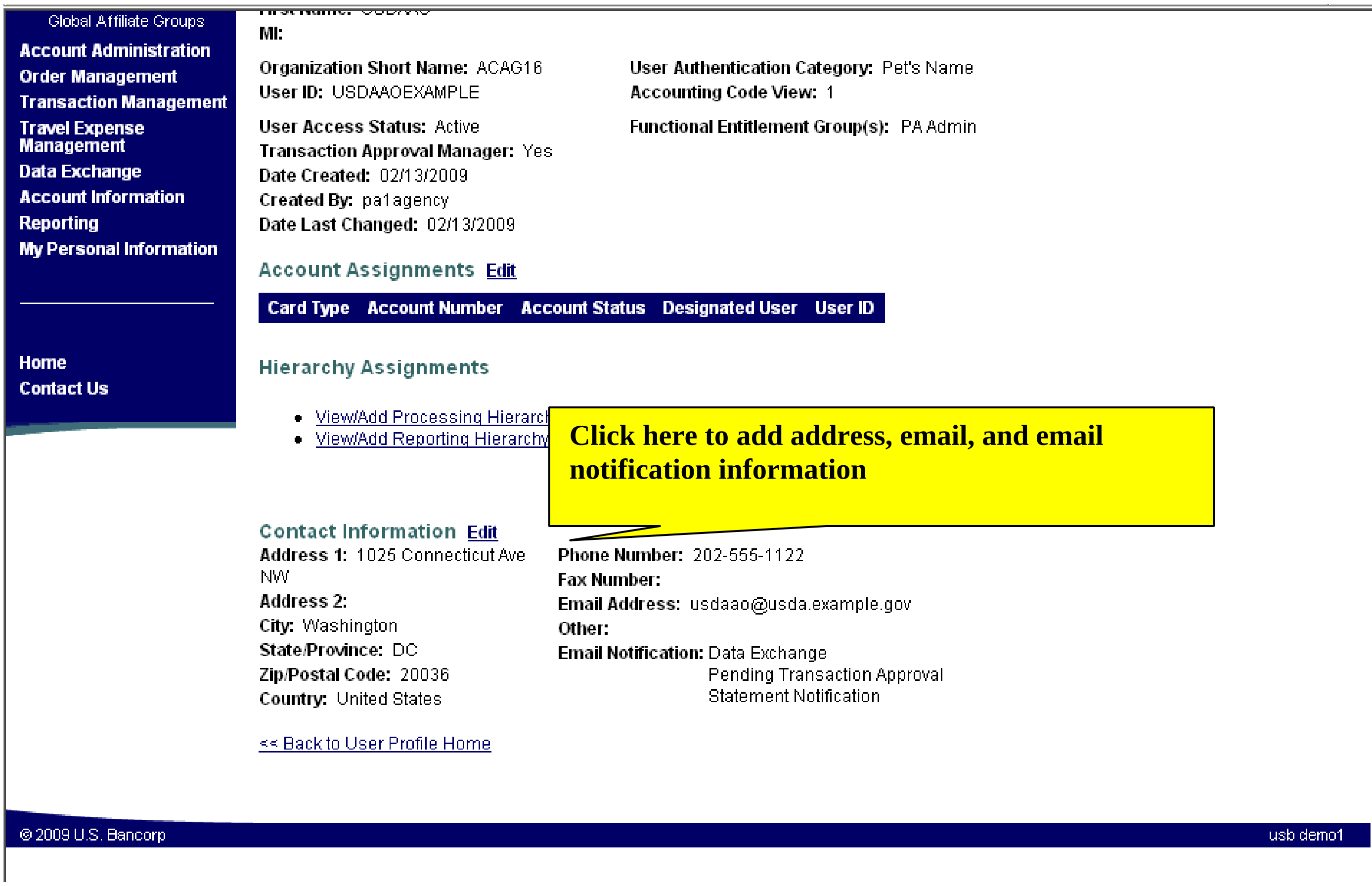


- **Select them with a check mark**
- **Accept the hierarchy**
- **You may also remove hierarchy from a user**
    - **Place a check mark in the hierarchy you wish to remove**
    - **Click on the button, "Remove position"**
    - **Accept Hierarchy**
- ***Note: Remember to add new hierarchy to a user 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***

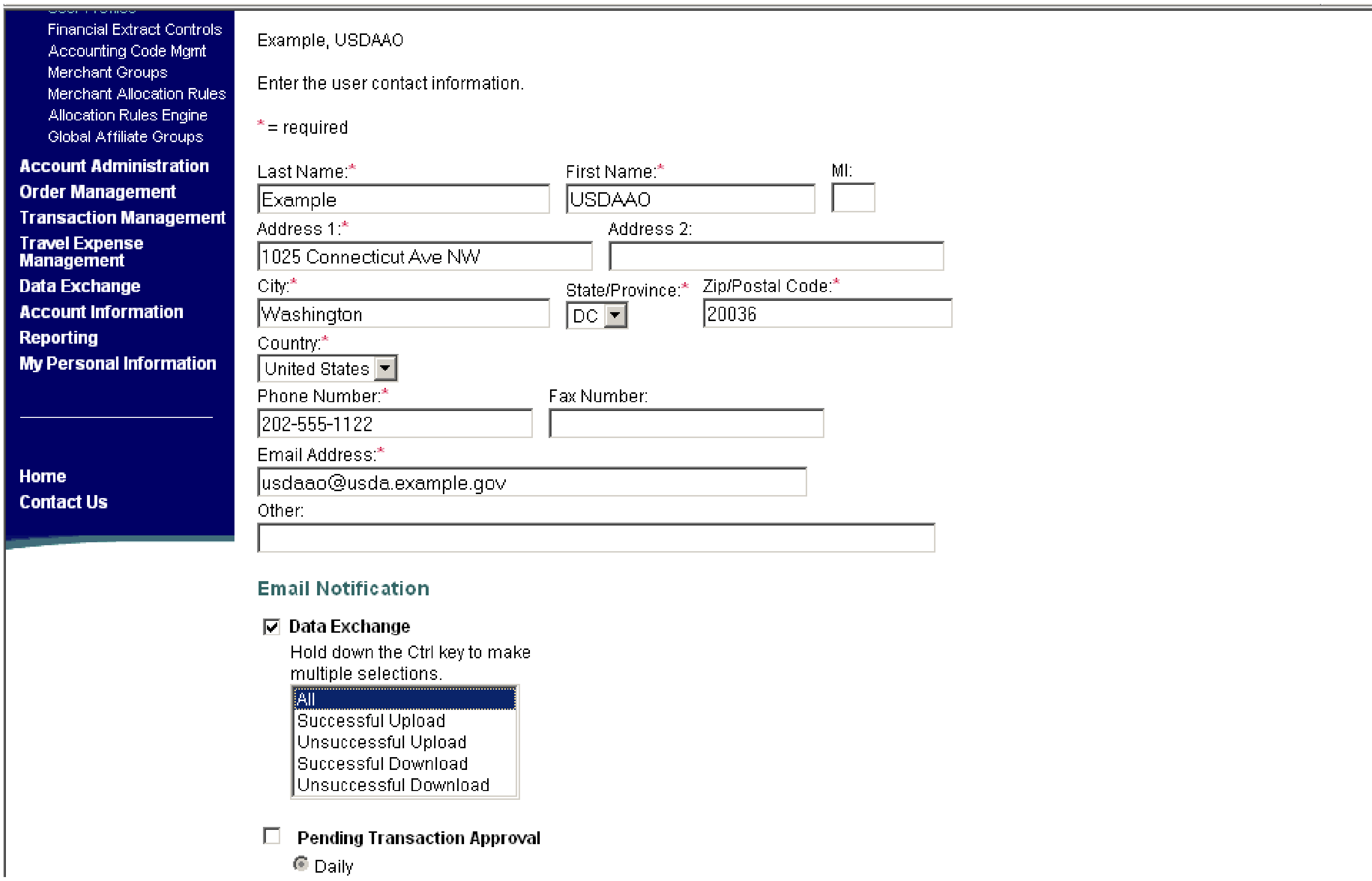
- **To enable a user as an approval manager (purchase APCs, LAPCs, AOs), click the login information edit link after linking hierarchy to the user ID**
- **By selecting the Approval Manager box, cardholders will be able to select and send approved transactions to this user for Final Approval**



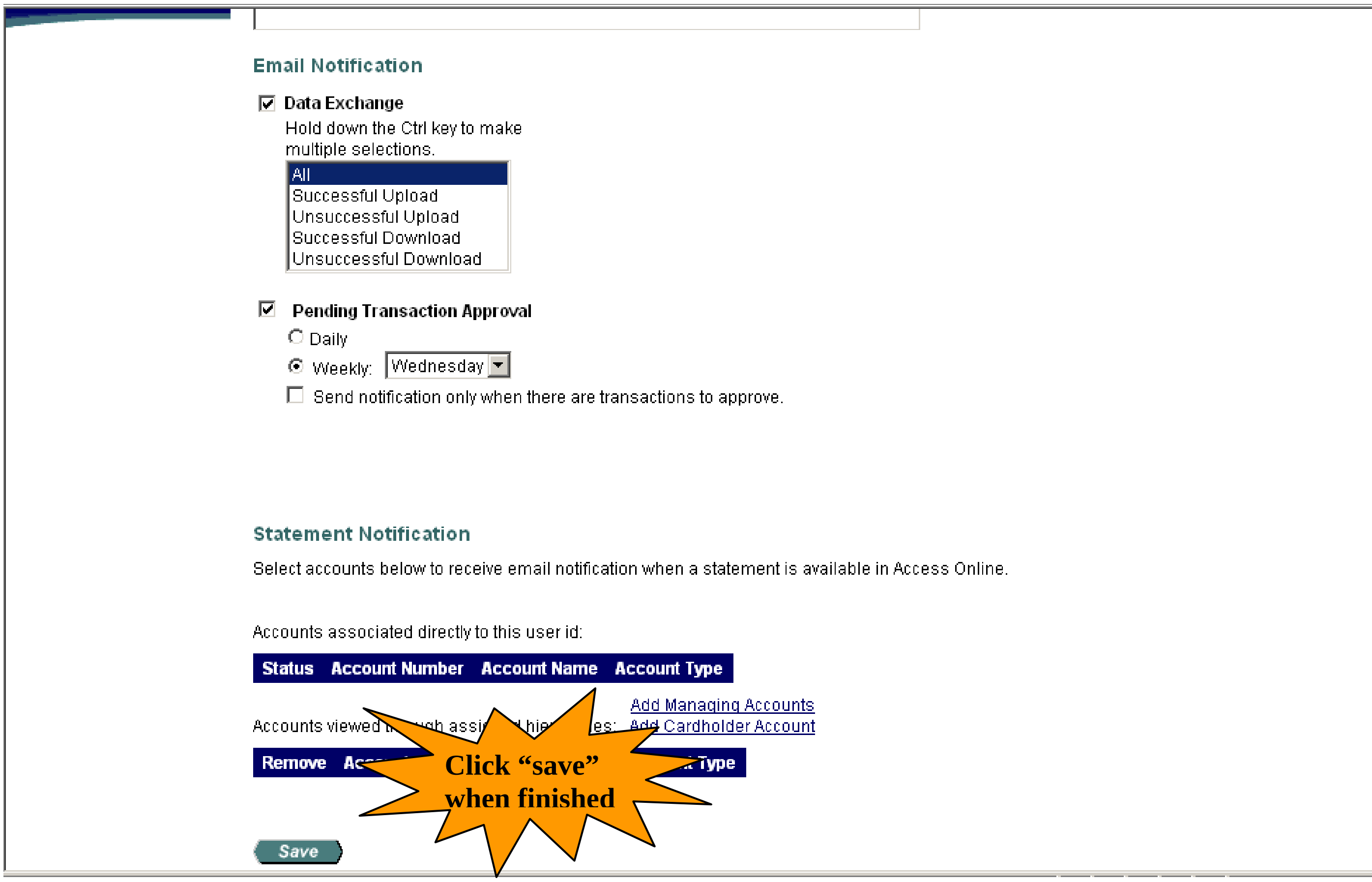
- **After placing the check mark in the Approval Manager box, click "save"**



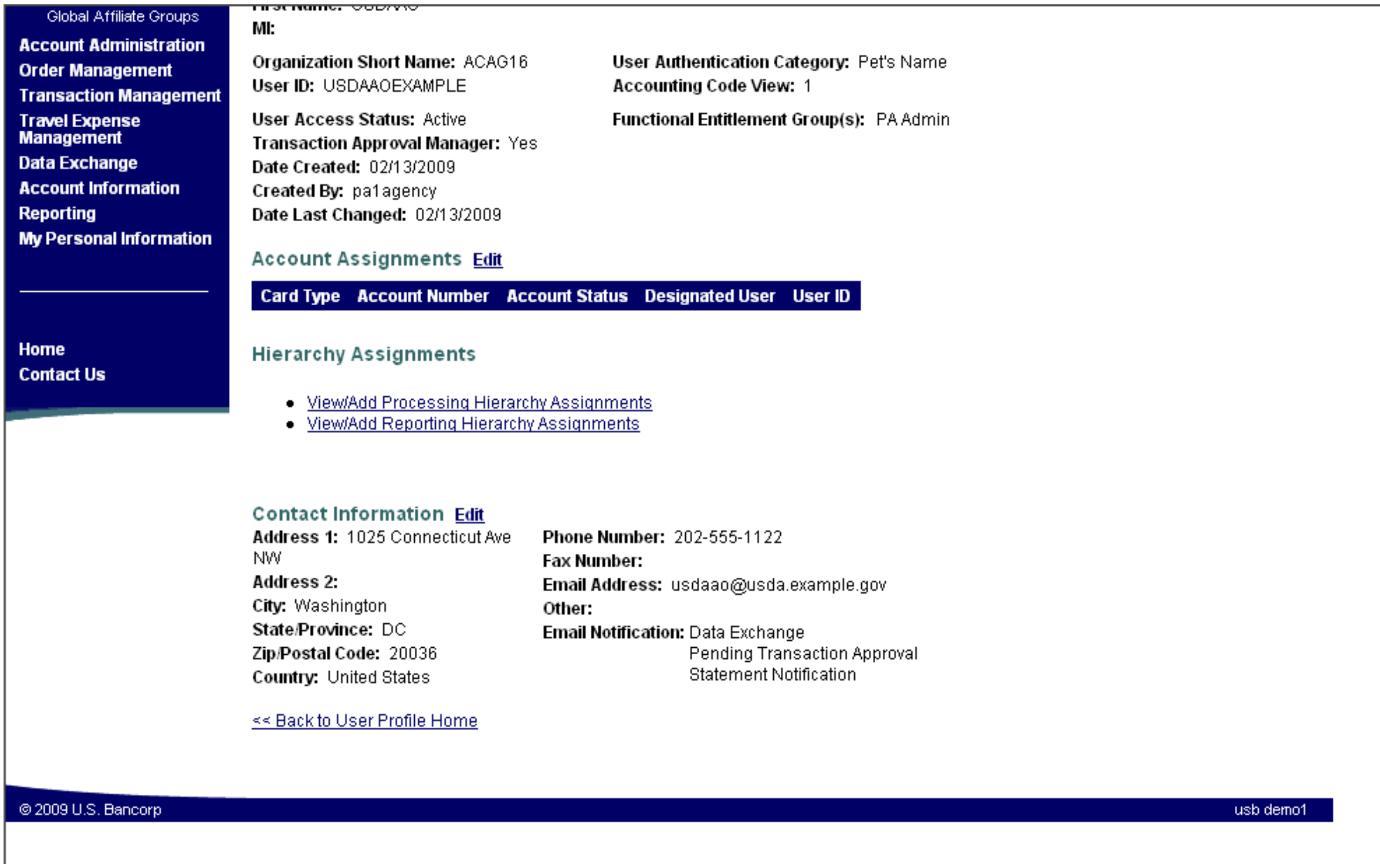
- **Select the Contact Information edit link to add the address, email, and email notification detail**



- **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**

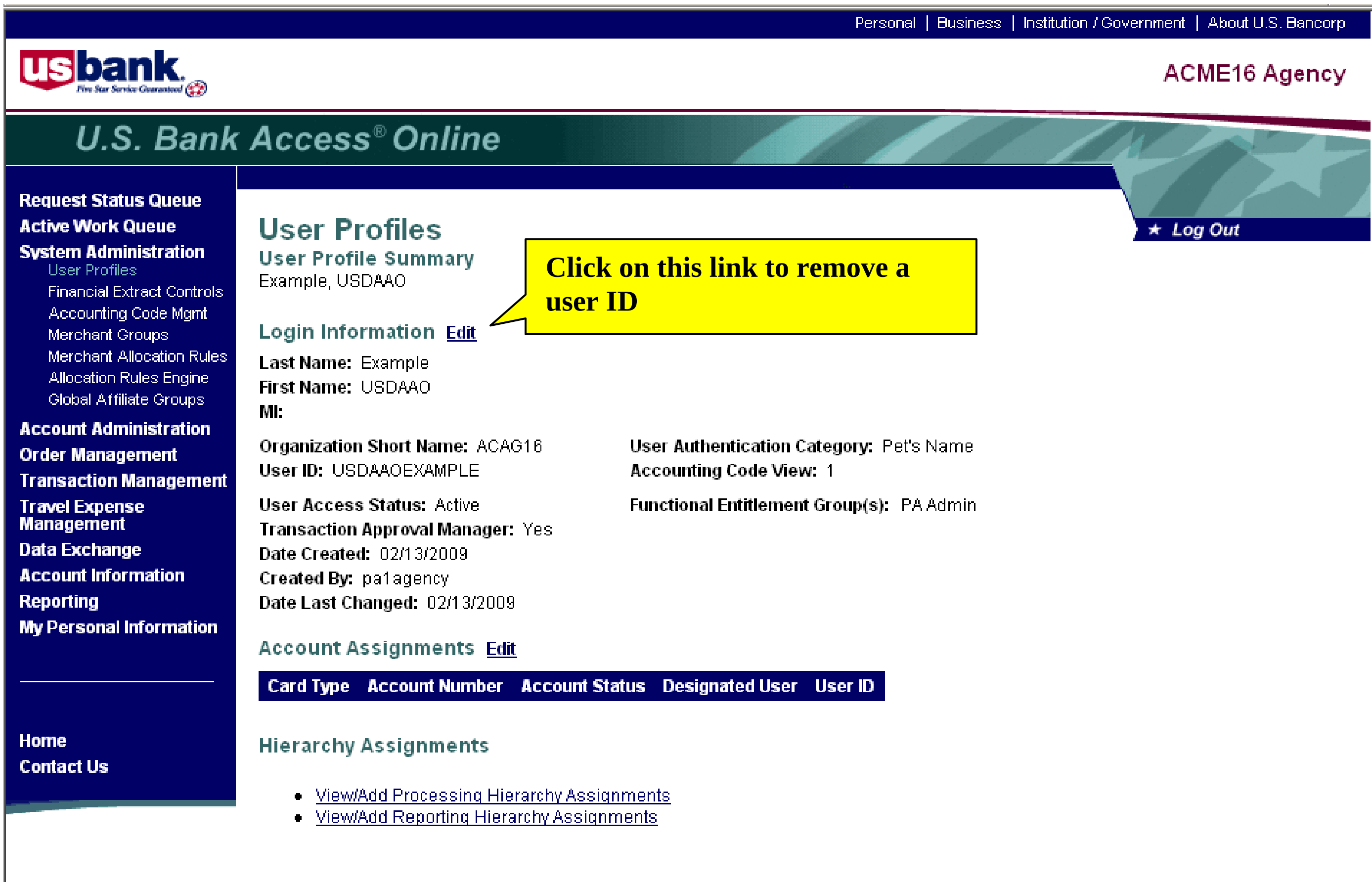


- Select "Pending Transaction Approval" to enable email notification when an approved transaction awaits the user's final approval in their Approval Manager Queue
- Select when the user should be notified of approved transactions in their queue
    - The default selection for USDA is weekly on Wednesdays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

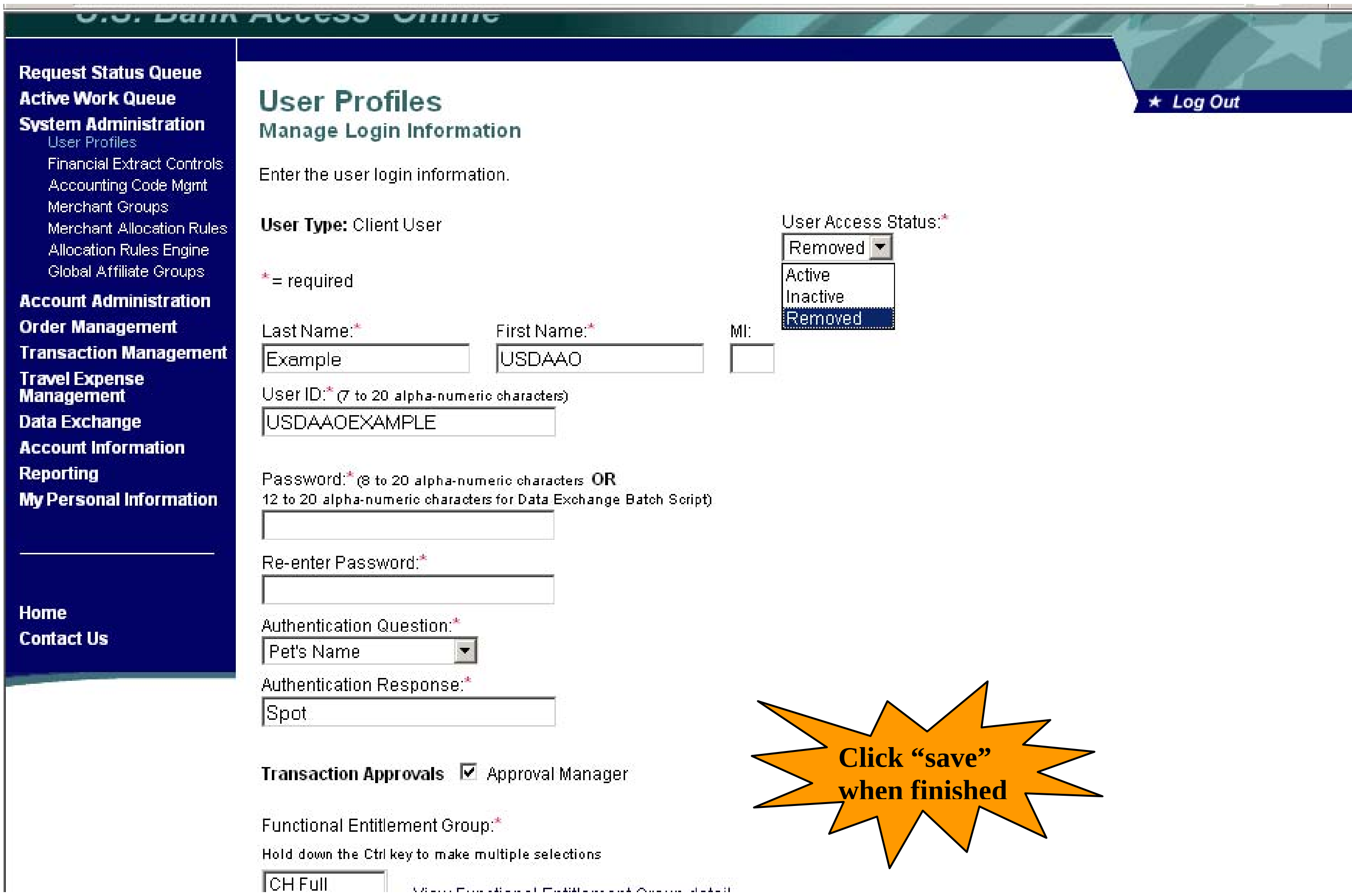


- **You will now see the User Profile Summary screen with your updates to the contact information**
- **Unless you need to maintain something, your request is complete and the user ID is created and ready to be used**
- ***Note: Approval Manager updates load overnight***

Removing a user ID



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



- **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