

# USDA User Profile Step-by-step

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

**1) Select System Administration**

**2) Select User Profile**

**Select "Setup a new user" to create a new user ID**

**Search for an existing user ID by user ID or name to maintain an ID**

- **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

**User Profiles**  
Manage Login Information

★ Log Out

Request Status Queue  
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Enter the user login information.

User Type: Client User      User Access Status: Active

\* = required

Last Name: Example      First Name: USDAO      MI:

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: 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 (\*)

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

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  
PA Admin  
PA Finance

[View Functional Entitlement Group detail](#)  
Select only one group at a time to view detail.

Accounting Code View:  
1

Save

[<< Back to User](#)

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**ONLY use Accounting Code View 1 for USDA user IDs**

**When finished, hit "save"**

**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**

### 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

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## 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

**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	Design
<b>Hierarchy Assignments</b> <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:**

**Address 2:**

**City:**

**State/Province:**

**Zip/Postal Code:**

**Phone Number:**

**Fax Number:**

**Email Address:**

**Other:**

**Email Notification:** Statement Notification

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

- 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**

U.S. Bank Access Online

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## User Profiles

Select a Processing Hierarchy Position

★ Log Out

### Search for a Hierarchy Position

Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:  
Agent

Bank: Agent: Company: Division: Department:

**Search**

---

To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Select Position". When you are satisfied with your selection(s), click "Accept Hierarchy".

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

Select	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

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

Records 1 - 1 of 1

**Selected Hierarchy Position(s)**

Remove	Bank	Agent	Comp	Div	Dept
no hierarchy position(s) selected.					

**Accept Hierarchy**

- **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)**

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**Search for a Hierarchy Position**

Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:

Bank:  Agent:  Company:  Division:  Department:

**Search**

To add a position to the Selected Hierarchy Positions, select the position from the list, mark the position as "Selected", and click the "Select Position" button. To remove a selected position from the list, mark the position as "Remove Position". When you are satisfied with your selection(s), click the "Accept Hierarchy" button.

**Select position to add hierarchy**

**Found Hierarchy Position(s)**

Records 1 - 1 of 1

Select	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

**Select Position >>**  
 << **Remove Position**

**Selected Hierarchy Position(s)**

Remove	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

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

Records 1 - 1 of 1

**Accept Hierarchy**

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

**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"**

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## User Profiles

### Select a Reporting Hierarchy Position

#### Search for a Hierarchy Position

Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:

Bank: Level 1: Level 2: Level 3: Level 4: Level 5: Level 6: Level 7:

       

**Search**

To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Select 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			<b>Select Position &gt;&gt;</b>
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555			<b>&lt;&lt; Remove Position</b>

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

#### Selected Hierarchy Position(s)

Remove	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4
no hierarchy position(s) selected.					

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

Allocation Rules Engine  
Global Affiliate Groups

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Hierarchy Level:  
Level 5

Bank: Level 1: Level 2: Level 3: Level 4: Level 5: Level 6: Level 7:

[Search](#)

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		

[Select Position >>](#) [<< Remove Position](#)

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

Records 1 - 2 of 2

[Accept Hierarchy](#)

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

**Selected Hierarchy Position(s)**

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

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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**



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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

**Click on this edit link to enable a user as an approval manager**

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

- [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

Enter the user login information.

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

\* = required

Last Name:\*  First Name:\*  MI:

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

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

Re-enter Password:\*\n

Authentication Question:\*\nPet's Name ▾

Authentication Response:\*\n

**Transaction Approvals**  Approval Manager

Functional Entitlement Group:\*\nHold down the Ctrl key to make multiple selections

[View Functional Entitlement Group detail](#)  
Select only one group at a time to view detail.

Accounting Code View:

Place a check mark here if you wish to enable your user as an approval manager

Click "save" when finished

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

- Global Affiliate Groups
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First Name: CDB/VIC  
**MI:**  
**Organization Short Name:** ACAG16      **User Authentication Category:** Pet's Name  
**User ID:** USDAAOEXAMPLE      **Accounting Code View:** 1  
**User Access Status:** Active      **Functional Entitlement Group(s):** PA.Admin  
**Transaction Approval Manager:** Yes  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

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

Card Type	Account Number	Account Status	Designated User	User ID
-----------	----------------	----------------	-----------------	---------

**Hierarchy Assignments**

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

**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](#)

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

Example, USDAAO

Enter the user contact information.

\* = required

Last Name:\*      First Name:\*      MI:

Example      USDAAO     

Address 1:\*      Address 2:

1025 Connecticut Ave NW     

City:\*      State/Province:\*      Zip/Postal Code:\*

Washington      DC      20036

Country:\*

United States

Phone Number:\*      Fax Number:

202-555-1122     

Email Address:\*

usdaao@usda.example.gov

Other:

**Email Notification**

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

**Pending Transaction Approval**

Daily

- **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**

**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:

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

[Add Managing Accounts](#)  
[Add Cardholder Account](#)

Accounts viewed through assigned hierarchy: [Add Cardholder Account](#)

Remove	Account Number	Account Name	Account Type

**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”**

Global Affiliate Groups

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**First Name:** USER  
**MI:**  
**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

**Hierarchy Assignments**

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

**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:** usdao@usda.example.gov  
**Other:**  
**Email Notification:** Data Exchange  
 Pending Transaction Approval  
 Statement Notification

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- **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® Online

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### 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

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## User Profiles

### Manage Login Information

Enter the user login information.

**User Type:** Client User

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

\* = required

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 [View Functional Entitlement Group details](#)



- 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*