USDA User Profile Guidance

Creating/Modifying Coordinators and
Approving Officials Information

USDA Purchase Card Program

USDA OPPM Charge Card Service Center

Originated: 03/13/2009
Updated: 10/01/2013
Version: 2.0

Revision History

Table 1 provides the revision history of this document.

Table 1. Revision History

Version	Date	Definition
1.0	03/13/2009	Initial version.
2.0	10/01/2013	Minor updates.

Table of Contents

REVISION HISTORY ..... **II**

LIST OF TABLES ..... **IV**

1 INTRODUCTION **1**

1.1 PURPOSE OF DOCUMENT 1

2 SETTING UP A NEW USER **2**

3 REMOVING A USER ID **16**

List of Tables

Table 1. Revision History ii
Table 2. FEG Matrix 4

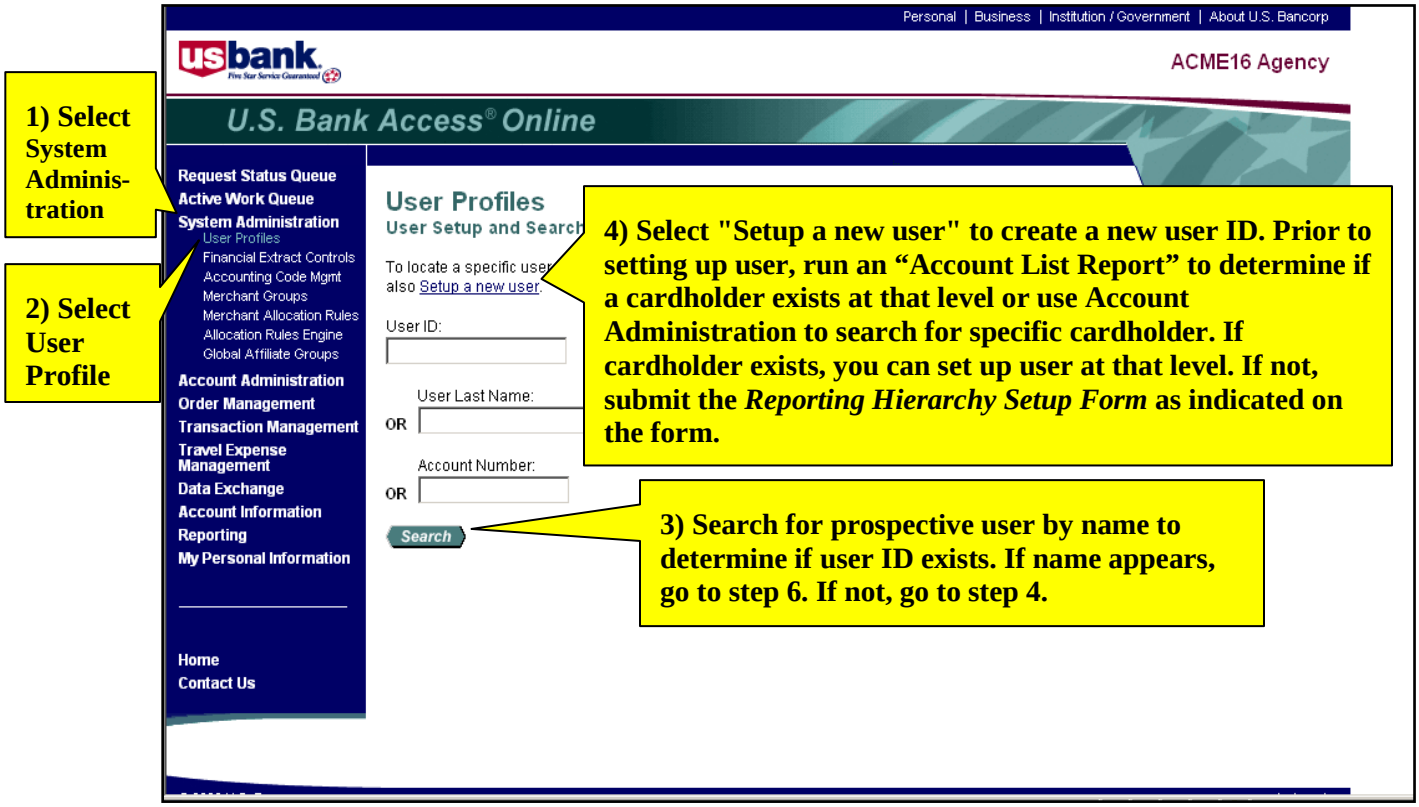
1 Introduction

1.1 Purpose of Document

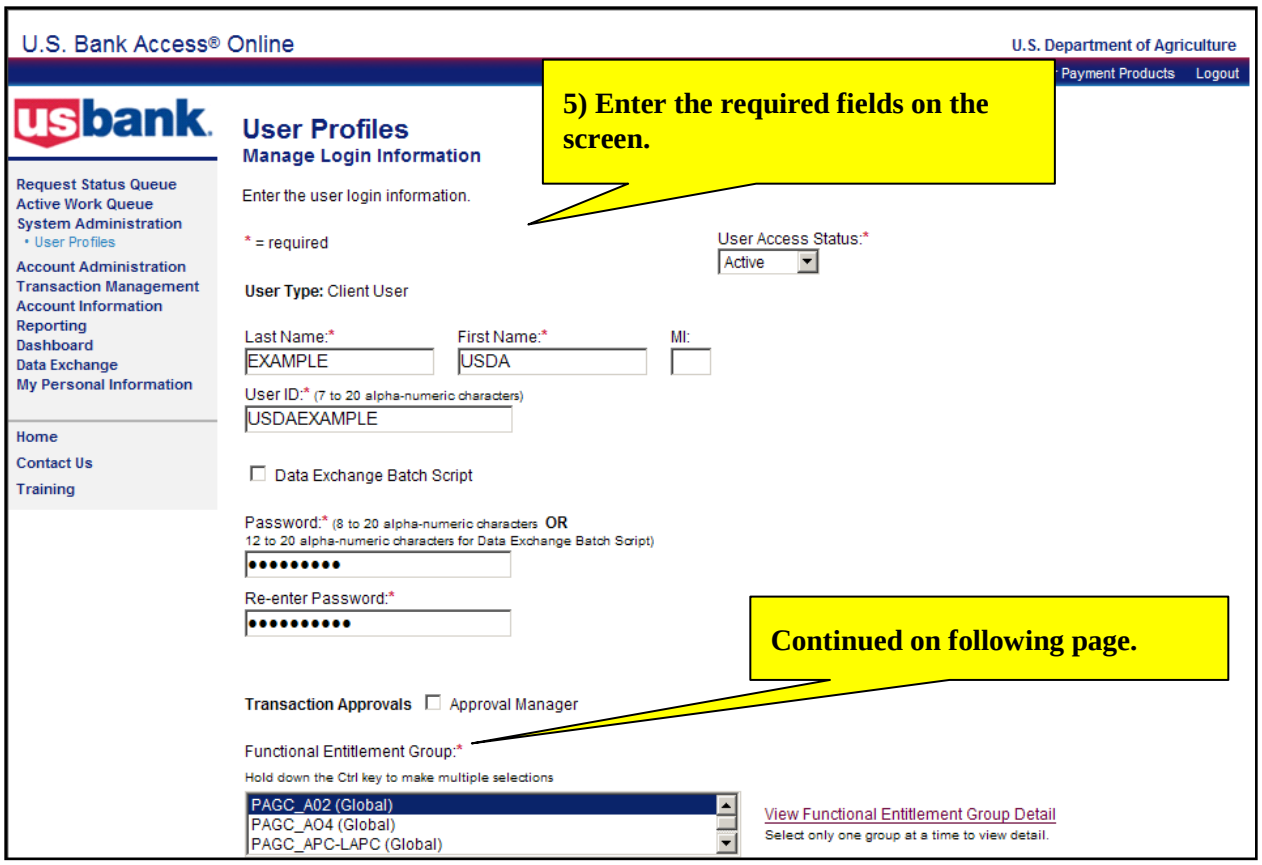
This guide was developed with the assistance of US Bank to provide Coordinators with step-by-step instructions to create/modify user IDs for LAPCs and Approving Officials (AO)s. APCs have the capability to create/modify user IDs for LAPCs. LAPCs have the capability to create/modify user IDs for AOs.

Use this guide 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 the CCSC Inbox.

2 Setting Up a New User



- 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 the name and perform applicable edits.



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

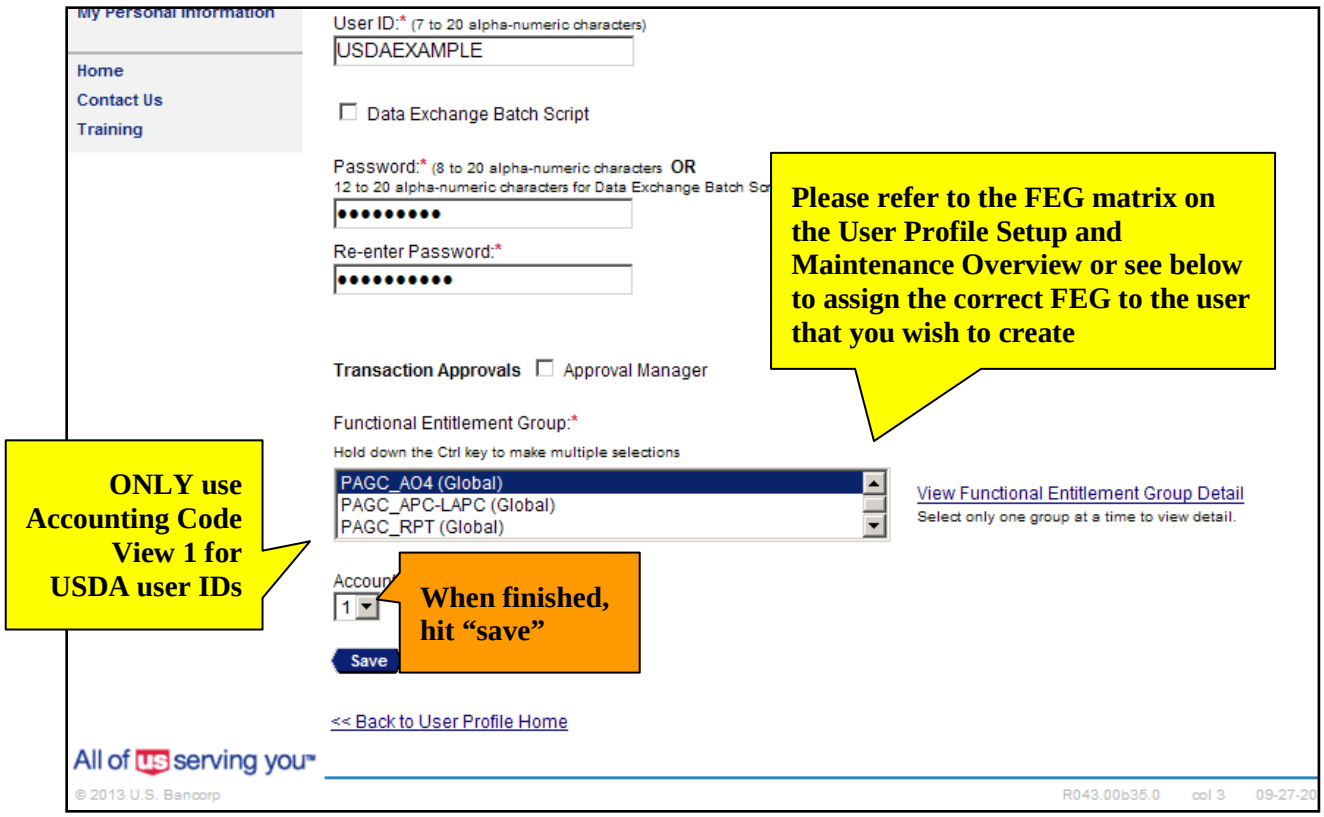
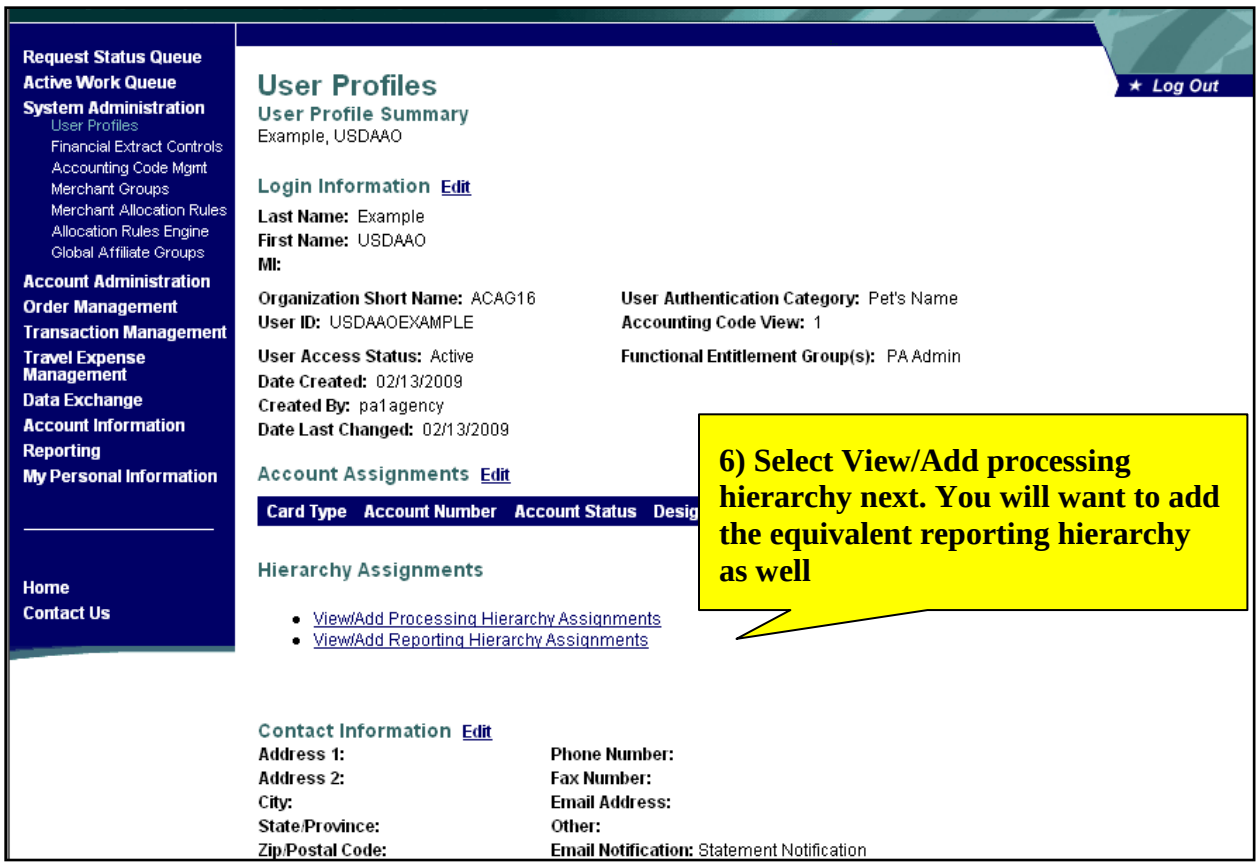


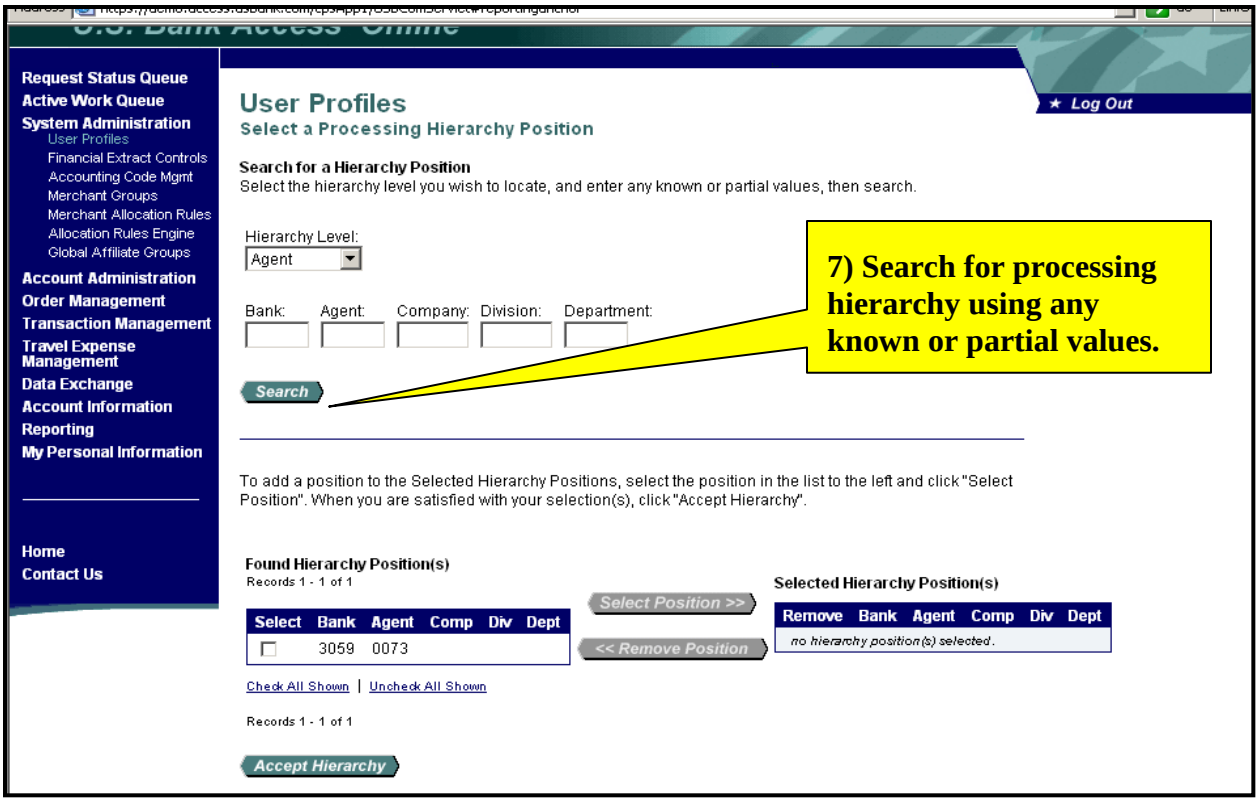
Table 2. FEG Matrix

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

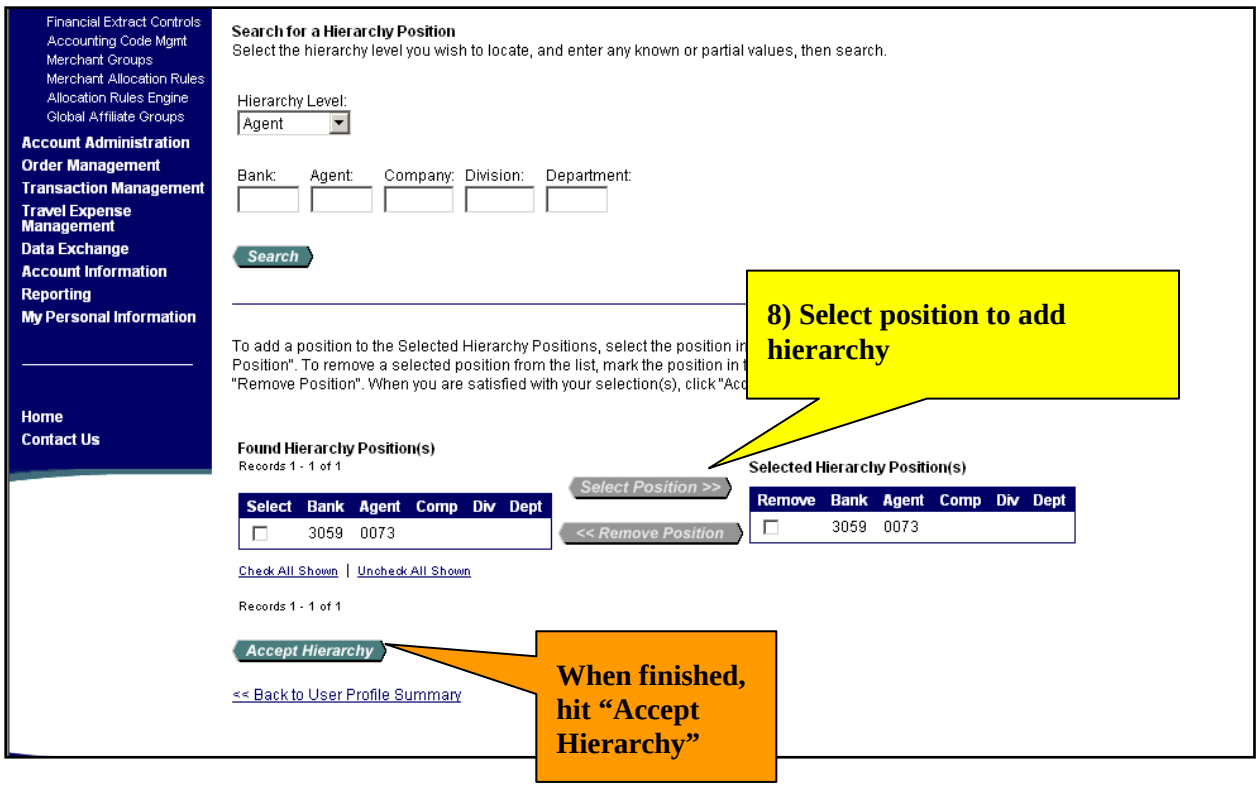
- For Purchase program use:
  - PAGC_APC-LAPC (LAPC/APC),
  - PAGC_AO4 (AO),
  - PAGC_RPT,
  - PAGC_AO2 (Financial POC)



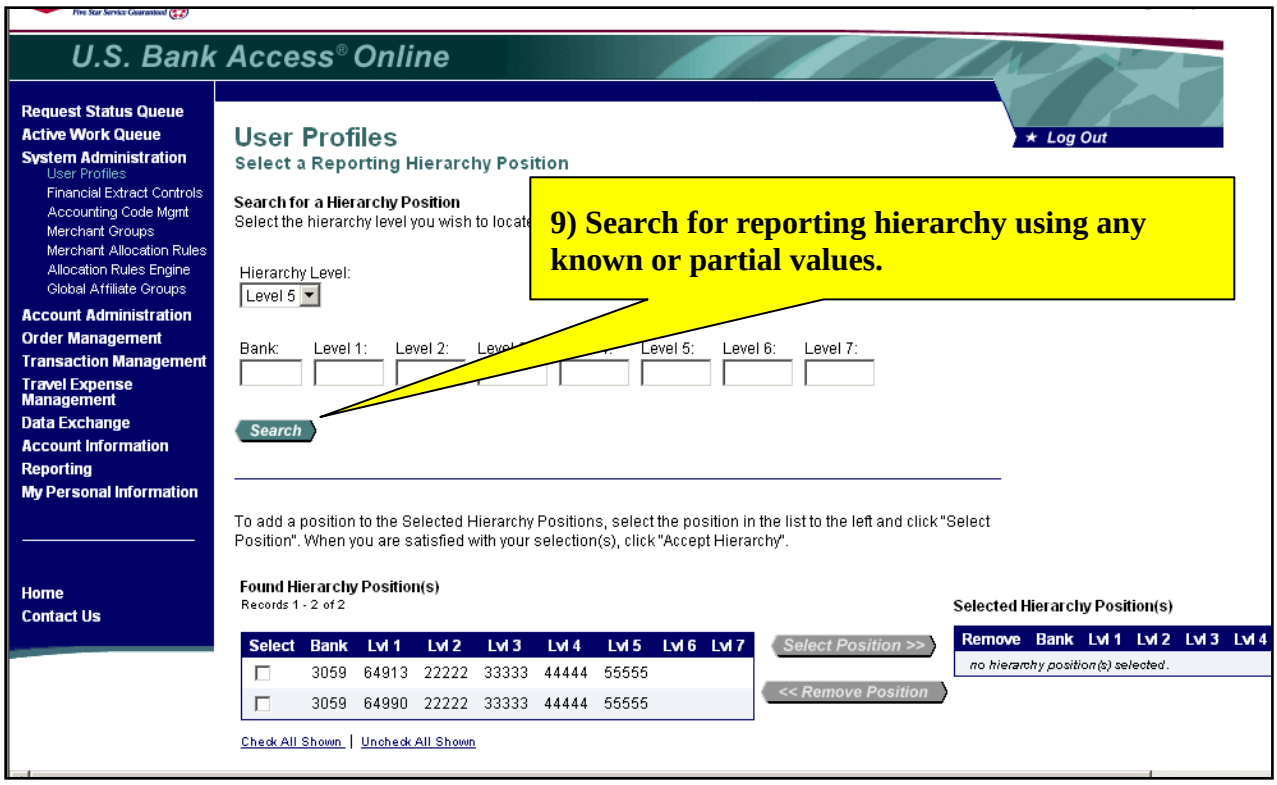
- After clicking "Save," you are brought to this screen.
- You should see the user ID log-in information that you set up at the top of the screen.
- Next step, add processing hierarchy to the user ID.



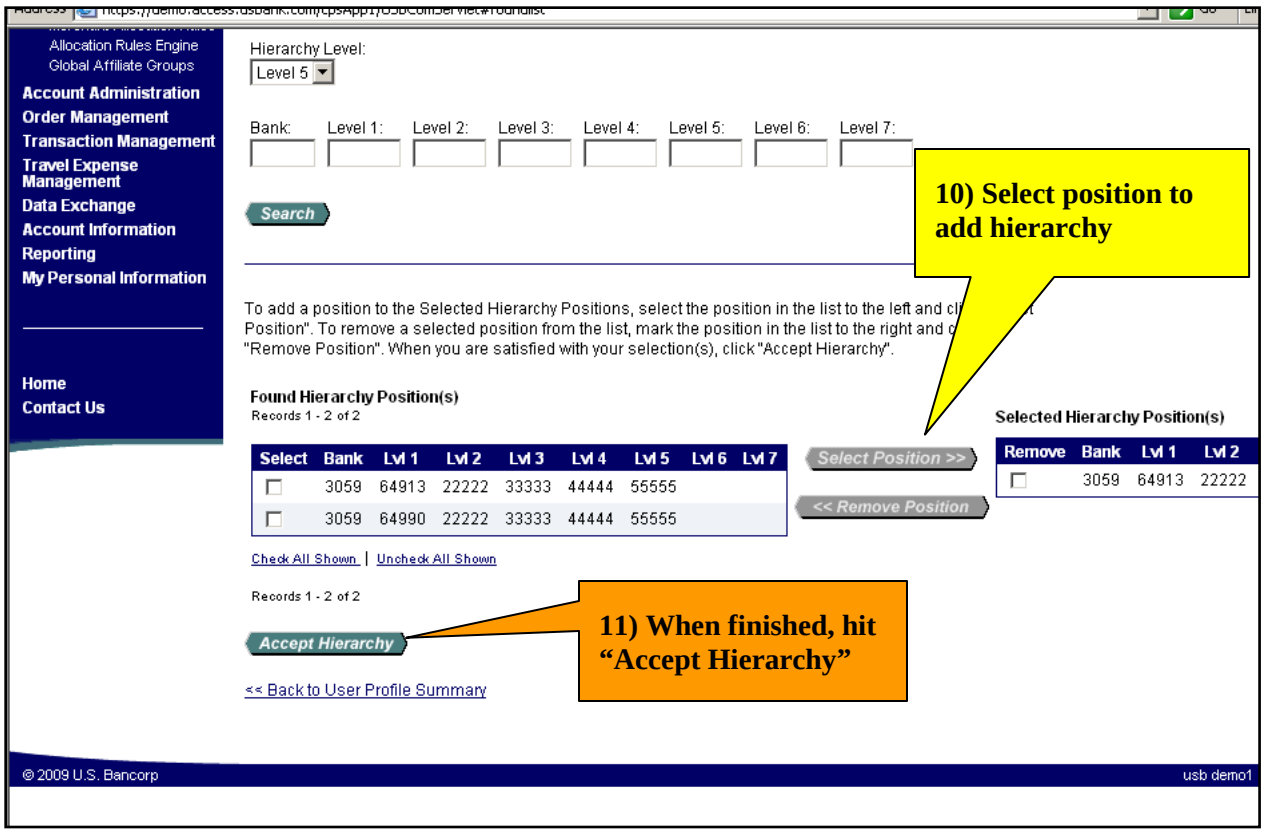
- Search for the hierarchy that you wish to link to this user ID:
  - APCs usually require one or multiple agent levels (level 4s).
  - LAPCs usually require one or multiple company levels (level 5s).
  - AOs usually require one or multiple division or department levels (level 6 or 7s).



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

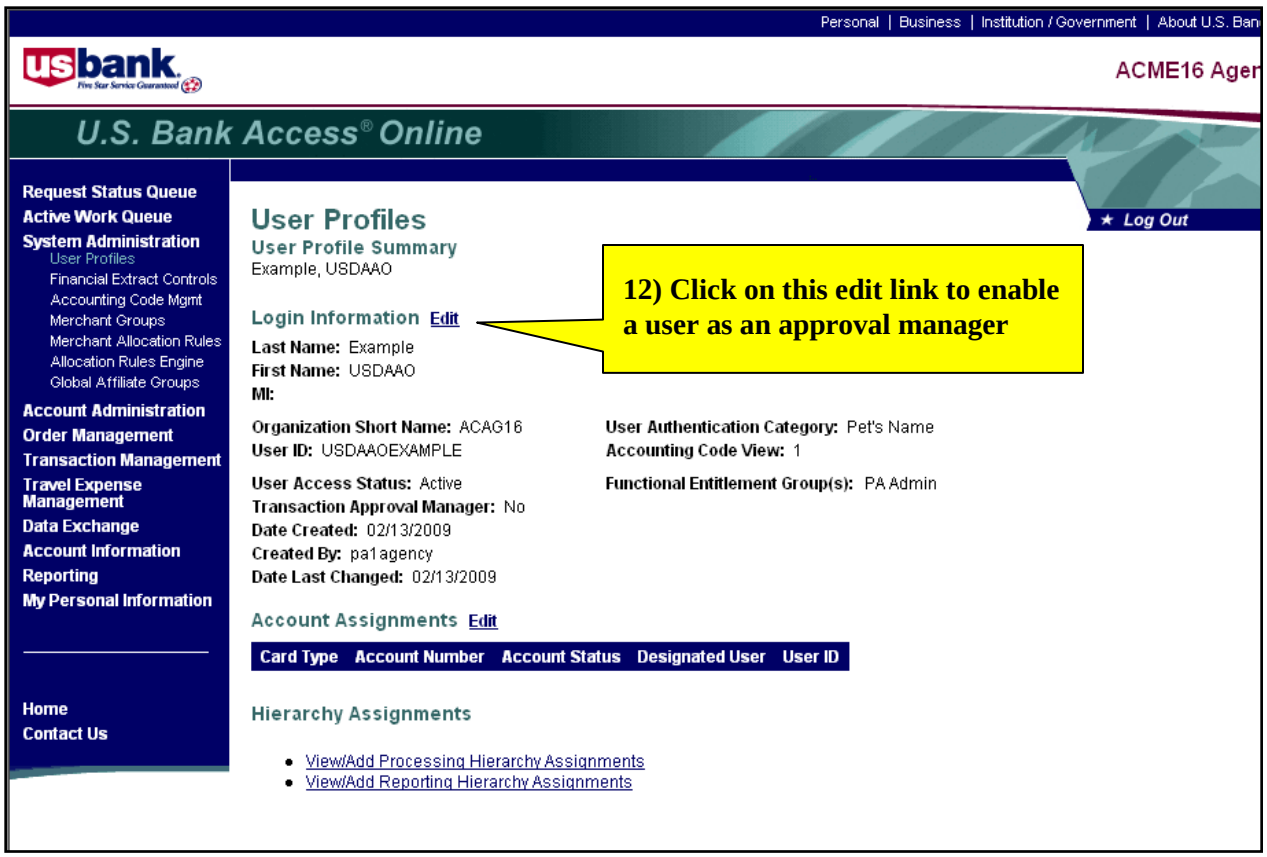


- Use the same process for reporting hierarchy.
- Search for the levels that you wish to link to the user.



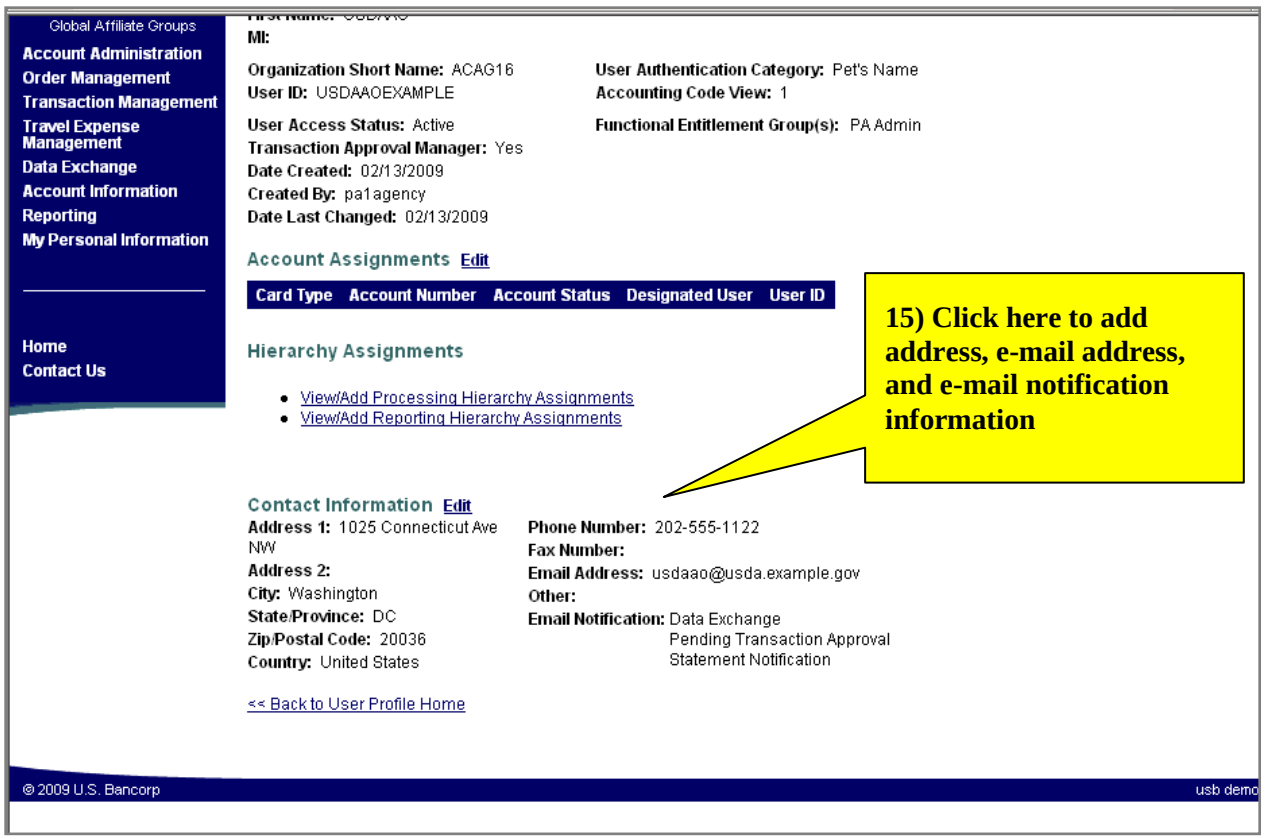
- Select them with a check mark.
- Accept the hierarchy.
- You may also remove hierarchy from a user:
  - Place a check mark in the hierarchy you wish to remove
  - Click the button "Remove position"
  - Accept Hierarchy
- See page 16 to remove a user ID altogether.

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.

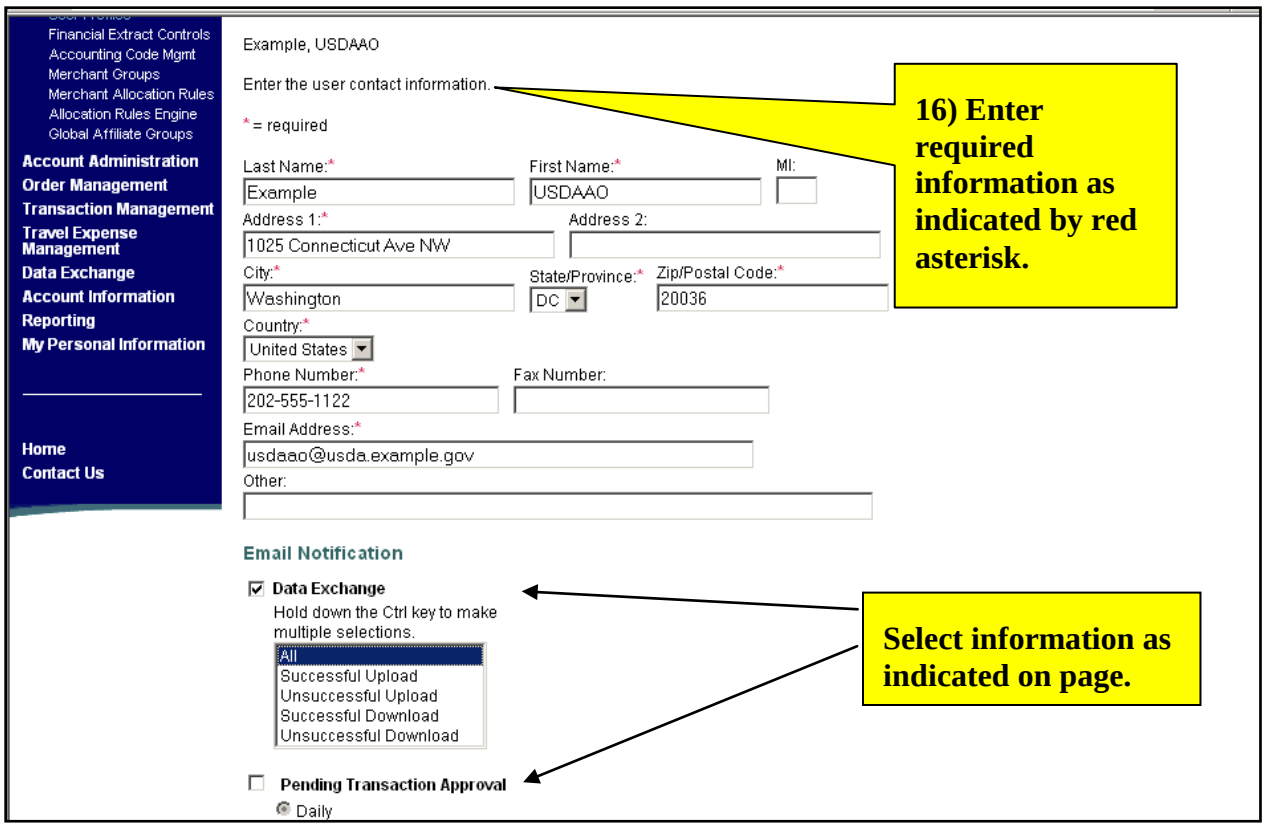


- To enable a user as an approval manager (purchase APCs, LAPCs, AOs), click the login information edit link after linking hierarchy to the user ID.
- By selecting the Approval Manager box, cardholders will be able to select and send approved transactions to this user for Final Approval.

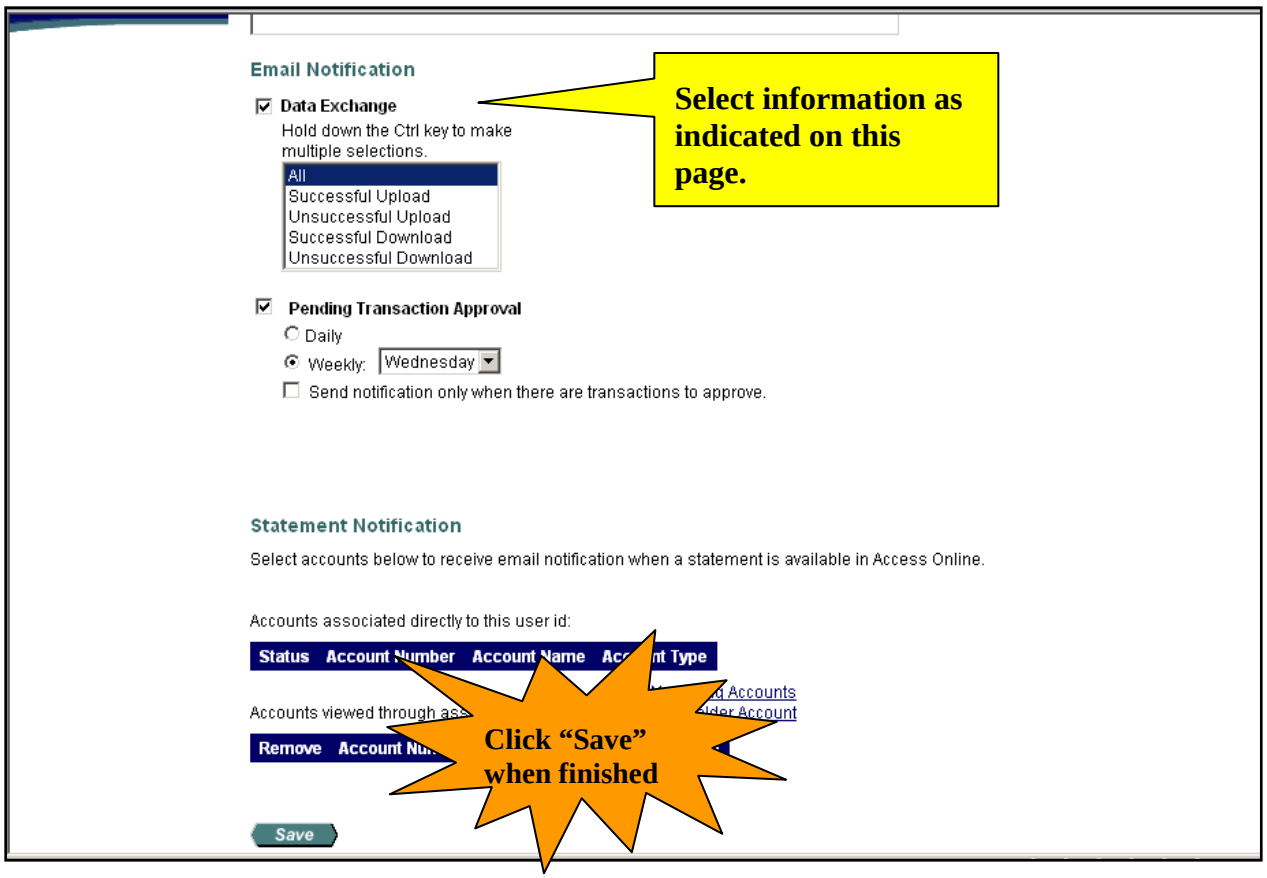
- After placing the check mark in the Approval Manager box, click "Save."



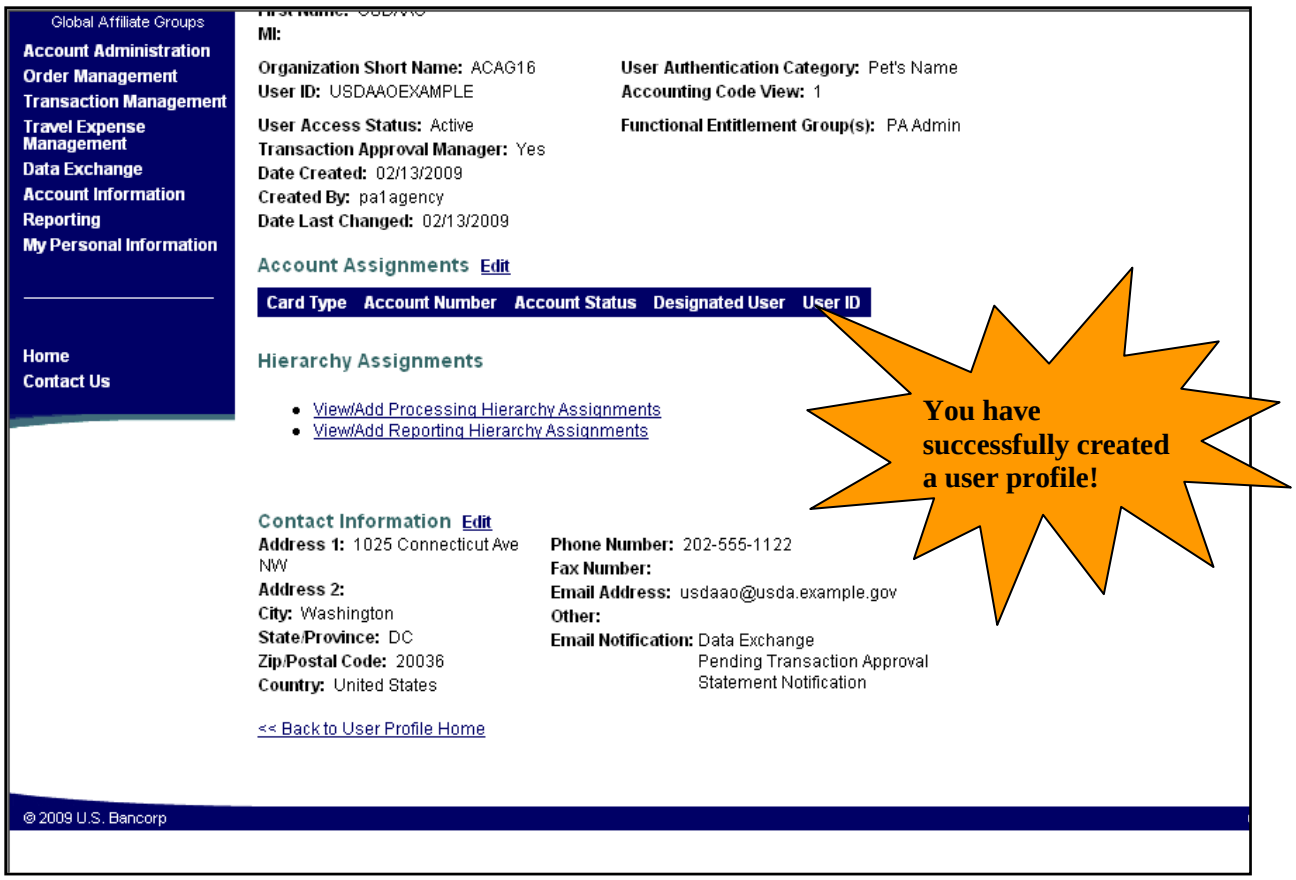
- Select the Contact Information edit link to add the address, e-mail address, and e-mail notification detail.



- 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 e-mail if a report is populated for the user.



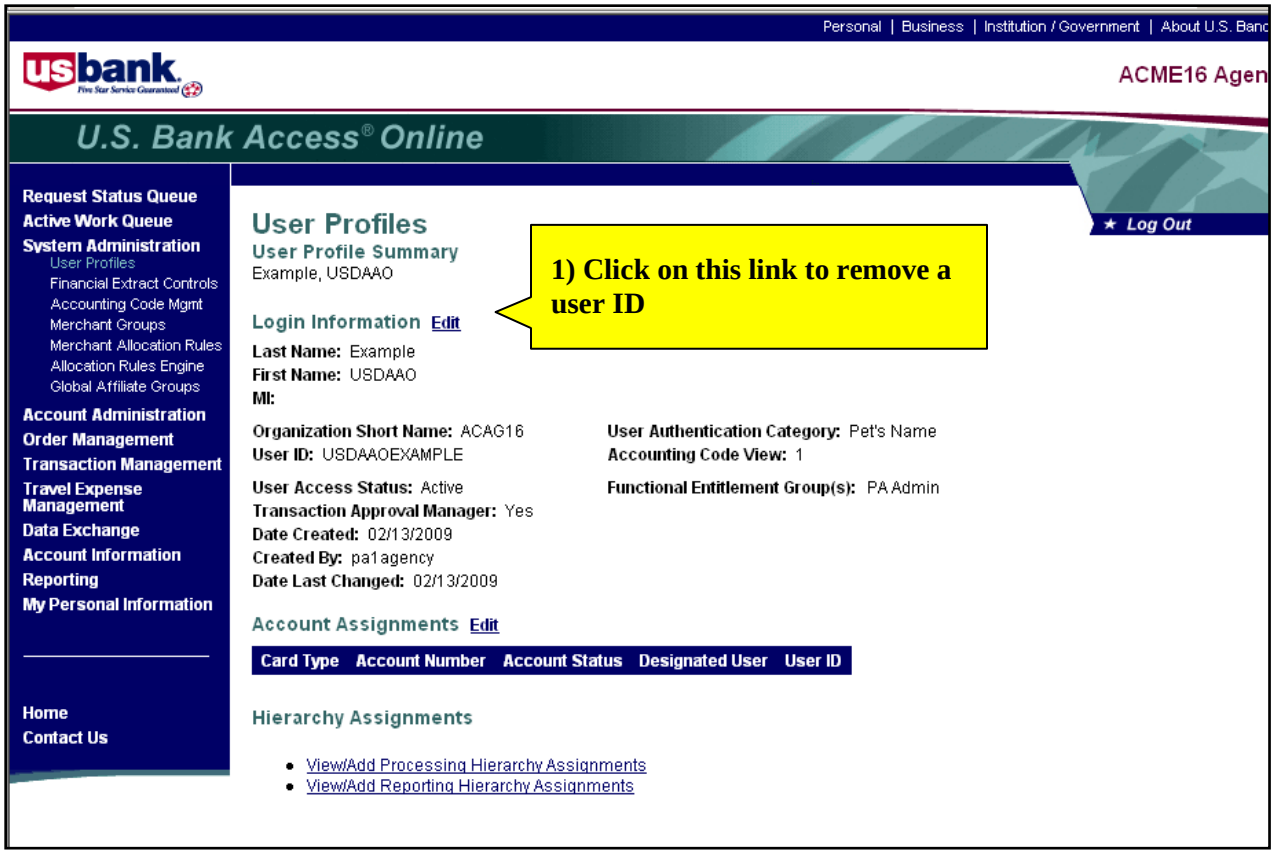
- Select "Pending Transaction Approval" to enable e-mail notification when an approved transaction awaits the user's final approval in their Approval Manager Queue.
- Select when the user should be notified of approved transactions in their queue.
    - The default selection for USDA is weekly on Wednesdays.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



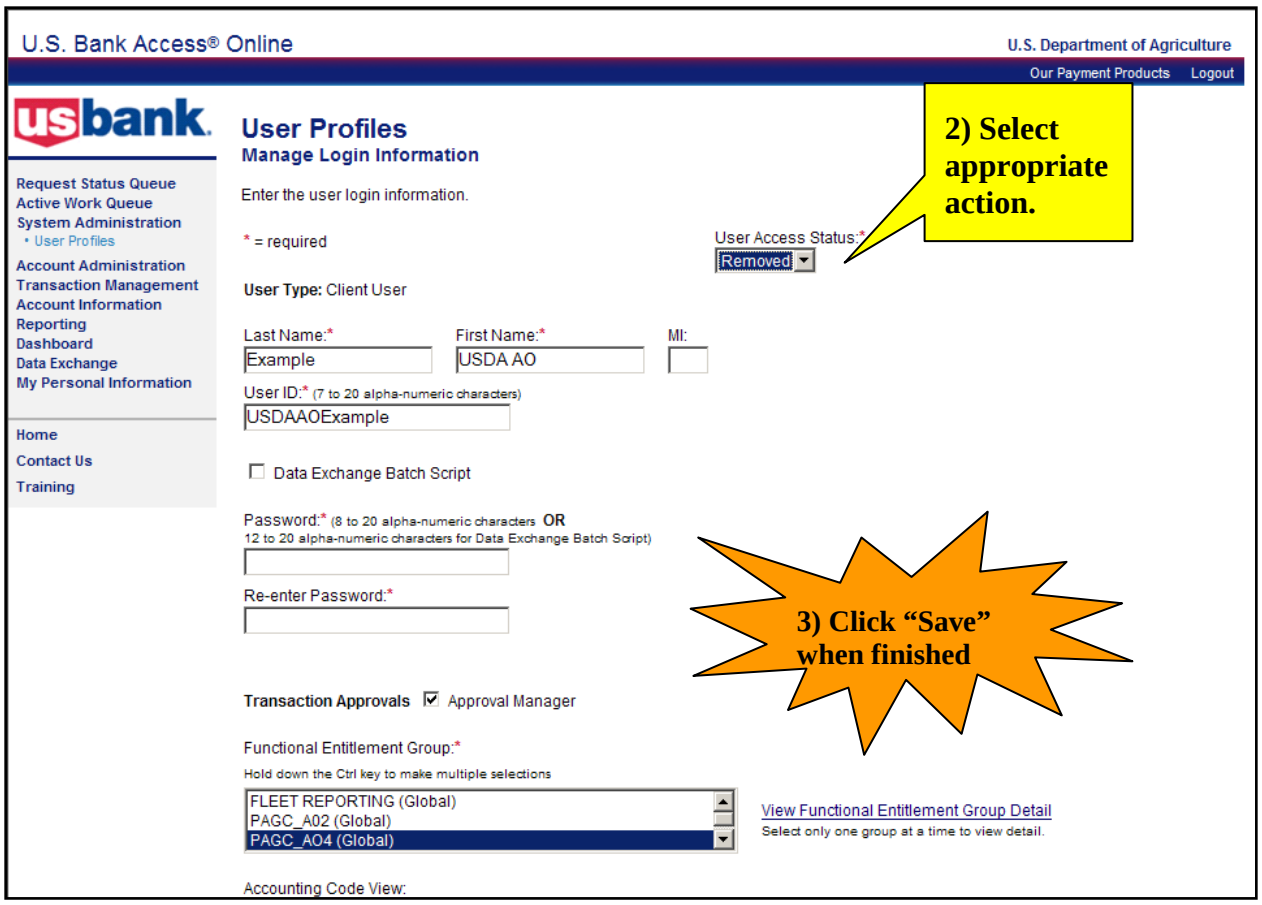
- You will now see the User Profile Summary screen with your updates to the contact information.
- Unless you need to maintain something, your request is complete and the user ID is created and ready to be used.

Note: Approval Manager updates load overnight.

3 Removing a User ID



- To remove a user ID, search for the user by user ID or name.
- Click 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 US Bank Customer Service at 888-994-6722, the technical help desk.