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# USDA User Profile Guidance

Creating/Modifying Coordinators and  
Approving Officials Information

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## USDA Purchase Card Program



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USDA OPPM Charge Card Service Center

Originated: 03/13/2009

Updated: 09/30/2016

Version: 3.0

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## Revision History

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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.
3.0	9/30/2016	Minor updates.

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# 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

The screenshot shows the U.S. Bank Access Online interface. At the top, there is a navigation bar with links for 'Personal', 'Business', 'Institution / Government', and 'About U.S. Bancorp'. The user is logged in as 'ACME16 Agency'. The main header reads 'U.S. Bank Access® Online'. On the left is a dark blue sidebar menu with the following items: 'Request Status Queue', 'Active Work Queue', 'System Administration' (highlighted), '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', and 'My Personal Information'. At the bottom of the sidebar are 'Home' and 'Contact Us' links. The main content area is titled 'User Profiles' and 'User Setup and Search'. It contains the text: 'To locate a specific user, also Setup a new user.' Below this are input fields for 'User ID:', 'User Last Name:', and 'Account Number:', each with an 'OR' option between them. A 'Search' button is located below the input fields. Three yellow callout boxes provide instructions: 1) 'Select System Administration' points to the sidebar menu. 2) 'Select User Profile' points to the 'User Profiles' link in the sidebar. 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.' points to the 'Search' button. 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.' points to the 'Setup a new user' link in the main content area.

- User Profile gives USDA APC/LAPCs the ability to setup new user IDs for APCs/LAPCs/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.

U.S. Bank Access® Online U.S. Department of Agriculture  
Payment Products Logout

**usbank** **User Profiles**  
Manage Login Information

Enter the user login information.

\* = required User Access Status:\*  
Active

User Type: Client User

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

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

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:\*

Transaction Approvals  Approval Manager

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

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

- 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)

**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** ★ Log Out  
**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	Designation
<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

**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.

**User Profiles**  
★ Log Out

**Select a Processing 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:  
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

Accept Hierarchy

**Selected Hierarchy Position(s)**

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

- 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).

**Note:** If this is a new hierarchy and no cardholders are assigned, the hierarchy will not be available in the search. A cardholder must be transferred into the hierarchy FIRST before an AO can be assigned to the new hierarchy.

**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 "Found Hierarchy Position(s)" table. To remove a selected position from the list, mark the position in the "Selected Hierarchy Position(s)" table with a checkmark in the "Remove" column. 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
<input type="checkbox"/>	3059	0073			

**8) Select position to add hierarchy**

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

**Accept Hierarchy**

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

- 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."

**U.S. Bank Access® Online**

**User Profiles** ★ Log Out

**Select a Reporting Hierarchy Position**

**Search for a Hierarchy Position**  
 Select the hierarchy level you wish to locate

Hierarchy Level:

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

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		
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555		

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

[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.

The screenshot displays the 'Hierarchy Level' section of the user profile management tool. It includes a dropdown menu for 'Hierarchy Level' set to 'Level 5', and input fields for 'Bank' and levels 1 through 7. A 'Search' button is located below these fields. A yellow callout box points to the 'Select Position >>' button, with the text: "10) Select position to add hierarchy". Below this, a table lists 'Found Hierarchy Position(s)' with columns for 'Select', 'Bank', 'Lvl 1', 'Lvl 2', 'Lvl 3', 'Lvl 4', 'Lvl 5', and 'Lvl 7'. Two rows of data are shown, each with a checkbox in the 'Select' column. To the right, a 'Selected Hierarchy Position(s)' table shows one selected position with columns for 'Remove', 'Bank', 'Lvl 1', and 'Lvl 2'. An orange callout box points to the 'Accept Hierarchy' button, with the text: "11) When finished, hit 'Accept Hierarchy'". At the bottom, there is a 'Back to User Profile Summary' link and a footer with '© 2009 U.S. Bancorp' and 'usb demo1'.

- 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.

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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: ACA016  
 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](#)

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

- 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.

The screenshot shows a web form for updating a user profile. On the left is a navigation menu with links: Reporting, Dashboard, Data Exchange, My Personal Information, Home, Contact Us, and Training. The main form area contains the following fields and options:

- Last Name:** \* (Text input: EXAMPLE)
- First Name:** \* (Text input: USDA)
- MI:** (Text input: )
- User ID:** \* (7 to 20 alpha-numeric characters) (Text input: USDAEXAMPLE)
- Data Exchange Batch Script
- Password:** \* (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script) (Text input: masked with dots)
- Re-enter Password:** \* (Text input: masked with dots)
- Transaction Approvals:**  Approval Manager
- Functional Entitlement Group:** \* (Dropdown menu with options: PAGC\_AO4 (Global), PAGC\_APC-LAPC (Global), PAGC\_RPT (Global))
- Accounting Code View:** (Dropdown menu with option: 1)
- Save** button
- [View Functional Entitlement Group Detail](#) (Text: Select only one group at a time to view detail.)
- [Back to User Profile Home](#)

At the bottom left is the logo: All of **us** serving you™

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

The screenshot shows a user profile page with a left-hand navigation menu and a main content area. The navigation menu includes links for Account Administration, Order Management, Transaction Management, Travel Expense Management, Data Exchange, Account Information, Reporting, and My Personal Information. The main content area displays user details such as Organization Short Name (ACAG16), User ID (USDAAOEXAMPLE), and User Access Status (Active). A yellow callout box with a pointer highlights the 'Contact Information' section, which includes fields for Address 1, Address 2, City, State/Province, Zip/Postal Code, Country, Phone Number, Fax Number, Email Address, and Email Notification. The callout box contains the text: '15) Click here to add address, e-mail address, and e-mail notification information'.

- Select the Contact Information edit link to add the address, e-mail address, and e-mail notification detail. This information is **required** by Program Management and must contain the individual’s government email address.

Example, USDAAO

Enter the user contact information.

\* = required

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

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**

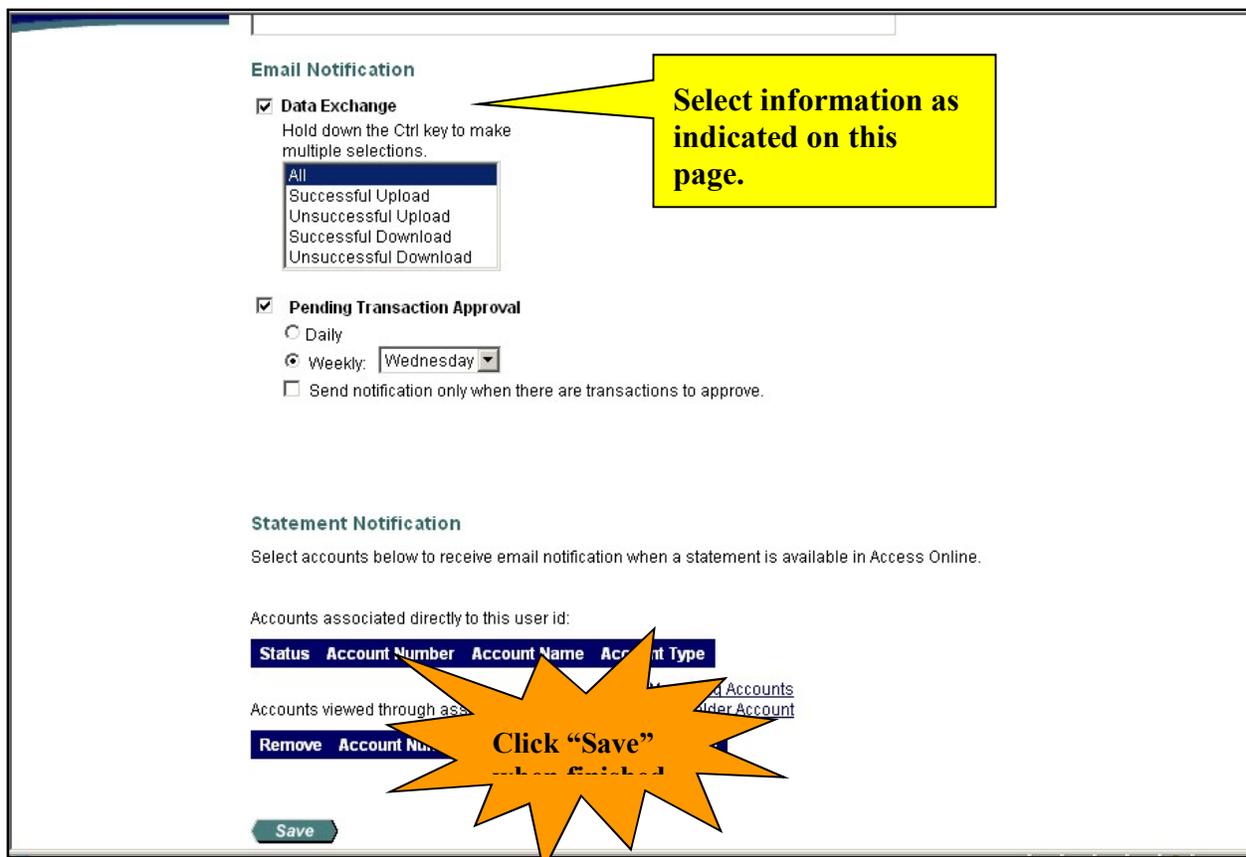
**Data Exchange**  
Hold down the Ctrl key to make multiple selections.

- All
- Successful Upload
- Unsuccessful Upload
- Successful Download
- Unsuccessful Download

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 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.”

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:** GUDYKO  
**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

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

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

You have successfully created a user

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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.

### 3 Removing a User ID

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★ 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**

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

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

**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](#)

Home  
Contact Us

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

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Our Payment Products Logout

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**User Profiles**  
Manage Login Information

Request Status Queue  
Active Work Queue  
System Administration  
• User Profiles

Account Administration  
Transaction Management  
Account Information  
Reporting  
Dashboard  
Data Exchange  
My Personal Information

Home  
Contact Us  
Training

Enter the user login information.

\* = required

User Access Status:\*  
Removed

User Type: Client User

Last Name:\* Example First Name:\* USDA AO MI:

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:\*

Transaction Approvals  Approval Manager

Functional Entitlement Group:\*

Hold down the Ctrl key to make multiple selections

FLEET REPORTING (Global)  
PAGC\_A02 (Global)  
PAGC\_A04 (Global)

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

Accounting Code View:

- 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.