Revision History

Table 1 provides the revision history of this document.

**Table 1. Revision History**

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>03/13/2009</td>
<td>Initial version.</td>
</tr>
<tr>
<td>2.0</td>
<td>10/01/2013</td>
<td>Minor updates.</td>
</tr>
<tr>
<td>3.0</td>
<td>9/30/2016</td>
<td>Minor updates.</td>
</tr>
</tbody>
</table>
# 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/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.

1) Select System Administration

2) Select User Profile

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.

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.
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

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

- 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.

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

7) Search for processing hierarchy using any known or partial values.
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.”
9) Search for reporting hierarchy using any known or partial values.

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

14) Click “Save” when

- 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. This information is **required** by Program Management and must contain the individual’s government email address.
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.