

Enrollment and Modification Guide

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New User Registration

Fiscal Service Self Enrollment

The term "new user" refers to an individual who does not currently have an identity (Single Sign On user ID and password, or SSO account) established to access Treasury applications via the UPS or ISIM provisioning services. If you already have an SSO account with which you access other Treasury applications via UPS or ISIM, proceed to the User Enrollment or Agency Administrator Enrollment section of this guide.

To create an identity (Single Sign On user ID and password), access the Fiscal Service Self-Enrollment page at https://isim.fiscal.treasury.gov/selfenroll/register. When the page opens, enter information in all required fields (denoted with an asterisk), retype the validation text in the corresponding field, and then click Submit.

Note: Access to the IPAC Application requires a government email (no .com emails will be accepted). Email addresses will be reviewed on an ongoing basis.

Fields with (*) are required Legal Prefix Legal First Name * Legal Middle Name Legal Last Name * Generational Identifiers / Suffix Click the Search button next to Organization. A separate browser Email * window will open. Enter your Agency name. Click the Search Re-Enter Email * button. The Search results will display. Click the radial button next Sponsoring Application * to your Agency, Click Add, then Done. Close the separate browser Organization * window if necessary. External Supervisors Office Phone * Office Extension Pager Number Office Fax Search: Office Room Number department of Office Street Address * Office Street Address 2 Search Office City * Office State * FA Department of Agriculture Office Zip * Office Country * UNITED STATES Add Done Please type the text from the image below. mixched Type the text from the Captcha image into the box and click Submit.



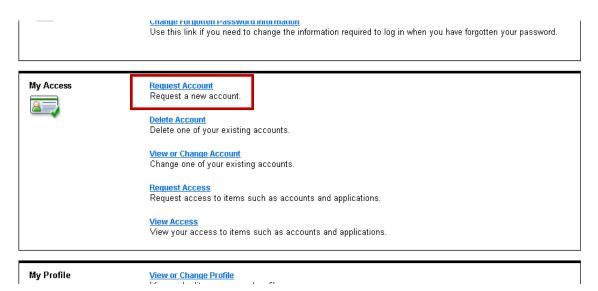
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User Enrollment

1. Access the **ISIM Self-Service website** at https://isim.fiscal.treasury.gov/itim/self. Enter your user ID and password, and then click **LOGIN**



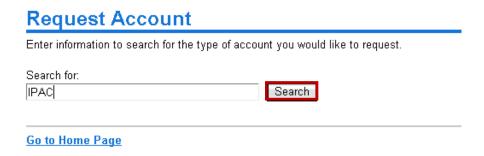
2. The **Self-Service** home page will load. To enroll, click the **Request Account** link in the **My Access** section.





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3. When the **Request Account** page loads, enter "IPAC" in the **Search for:** field, and then click **Search**.



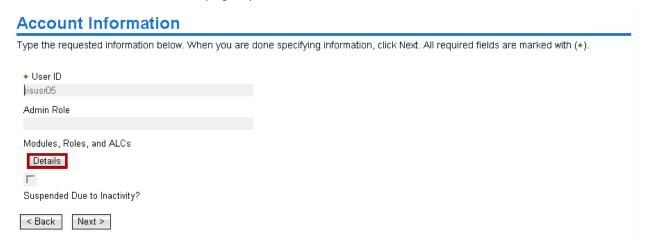
4. When the **Search Results** appear, click **IPAC**.

Search Results

Click the account type that you would like to request.



5. When the **Account Information** page opens, click **Details**.

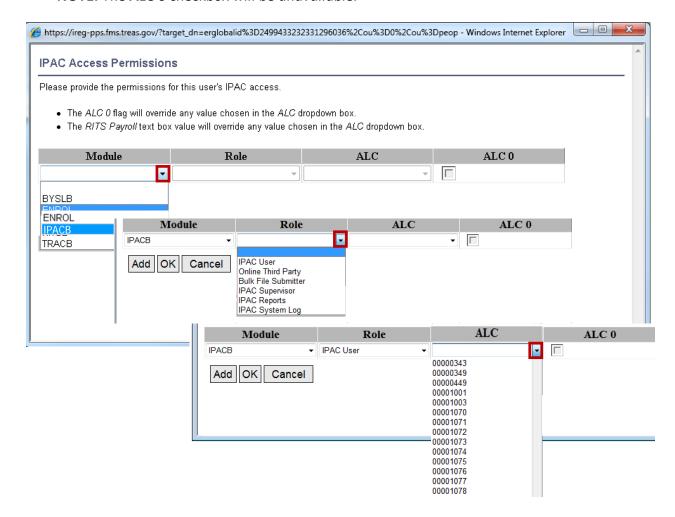




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6. When the **IPAC Access Permissions** page opens, navigate through each of the three dropdown menus in order from left to right to select the appropriate options in the **Module**, **Role**, and **ALC** fields.

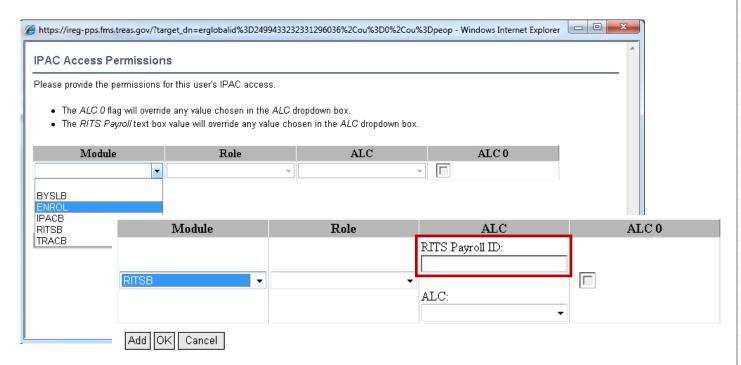
NOTE: The **ALC 0** checkbox will be unavailable.





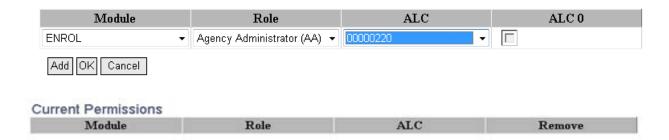
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7. If selecting the **RITSB** module option, enter the RITS Payroll ID in the appropriate field of the ALC column (if the **RITS Payroll ID** field is populated, the **ALC** field below it should not be populated).



8. After all three fields are populated with your selections, click **Add**. This will add the Module/Role/ALC combination to the *Current Permissions* section.

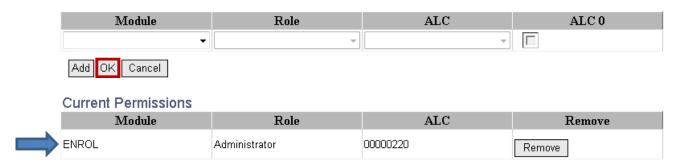
NOTE: Only one ALC may be selected per row. To add additional modules/roles for the same or other ALCs, move through steps 6-8 as many times as needed. Upon entering each module/role/ALC combination, verify that it appears in its own row under **Current Permissions**. To add additional access at a later time, it will be necessary to follow the instructions in the Account Modification section of this quide.



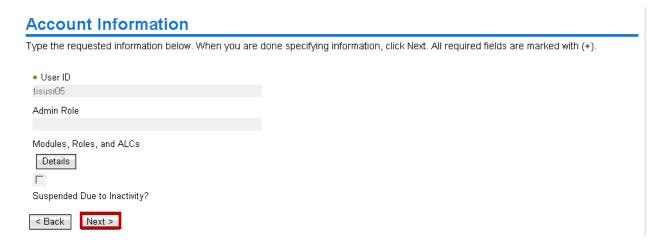


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9. When all needed module/role/ALC combinations appear in the Current Permissions section, click OK.



10. When the **Account Information** page reopens, click **Next**.



11. When the Request Account: IPAC page appears, click Request Account.





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12. When the Request Submitted: Request Account page appears, click View My Requests to view the status of the request.

Request Submitted: Request Account

You have submitted a request. Below is the information available to you at this time.

Request Detail

Request ID: 7632956883220539153 Date submitted: February 25, 2014 10:43:11 AM

Request type: Account Add Account/Access: tisusr05 on IPAC

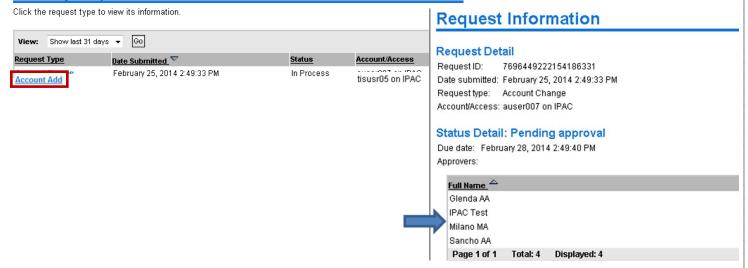
Related Tasks

- To review other activities, refer to the <u>Approve and Review Requests</u> age.
 To perform other tasks go to the <u>IBM Security Identity Manager Home</u> page.
- 13. When the View My Requests page opens, the status of the request will be visible. To view request details, click Account Add to access the Request Information page, including the list of approvers who are authorized to take action on the request. When the request has been completed (approved or rejected), the status will change accordingly.

IMPORTANT NOTE: Access requests are reviewed and approved/rejected on a case-by-case basis according to the ALC selected. Each ALC has at least one Agency Administrator (AA) and one Master Administrator (MA) who approve access requests. If multiple module/role/ALC combinations are submitted, a separate access request will be sent to the appropriate AA/MA for the ALC from each combination, even if the AA(s)/MA(s) are the same for all ALCs to which access was requested.

Because access to a variety of module/role/ALC combinations may be requested within a single submission, it is possible that one of the combinations may have been rejected by the AA and/or MA for that ALC, even if the submission appears on the View My Requests page with a status of "Success." If you are unable to access IPAC with any module/role/ALC combination(s) you requested, you will need to resubmit an access request for the missing module/role/ALC combination(s) as described in the Account Modification section of this guide.

View My Requests





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Master Administrator (MA) Enrollment

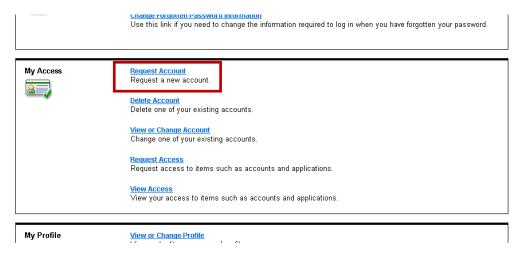
1. To enroll as an IPAC Master Administrator, complete and submit the <u>Master Administrator Designation Form</u> to the Treasury Support Center (TSC). For assistance or questions, please contact the TSC at 877-440-9476 or ipac@stls.frb.org.

Agency Administrator (AA) Enrollment

1. Access the **ISIM Self-Service website** at https://isim.fiscal.treasury.gov/itim/self. Enter your user ID and password, and then click **LOGIN**



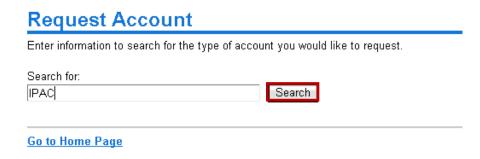
2. The **Self-Service** home page will load. To enroll, click the **Request Account** link in the **My Access** section.





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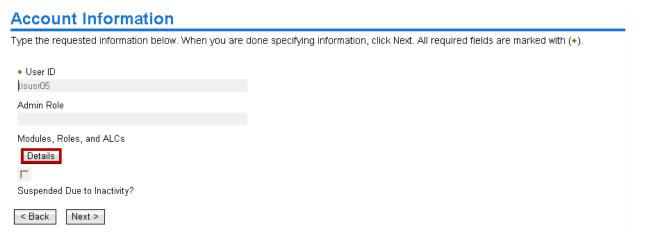
3. When the **Request Account** page loads, enter "IPAC" in the **Search for:** field, and then click **Search**.



4. When the **Search Results** appear, click **IPAC**.



5. When the Account Information page opens, click Details.

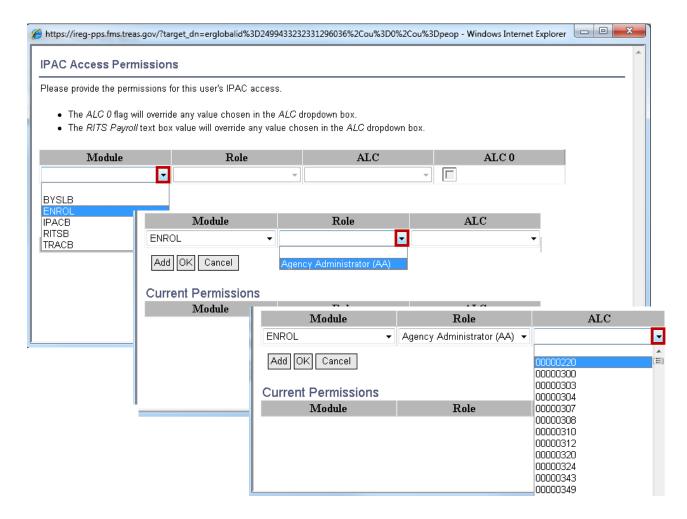


6. When the **IPAC Access Permissions** page opens, navigate through each of the three dropdown menus in order from left to right to select the Agency Administrator options: for **Module**, "ENROL"; for **Role**: "Agency Administrator"; and the necessary **ALC**.



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NOTE: The **ALC 0** checkbox will be unavailable.



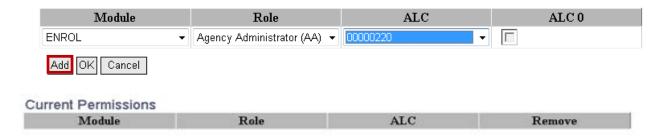


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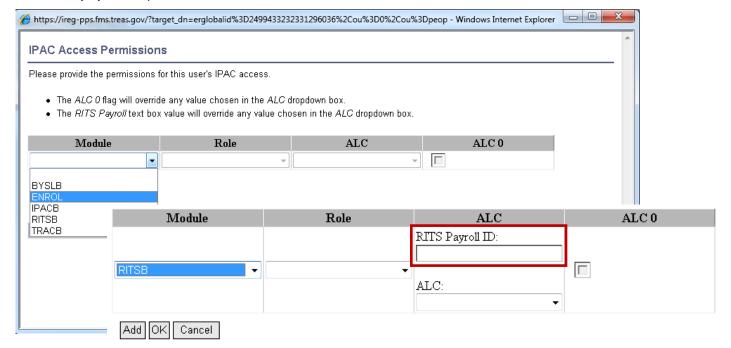
7. After all three fields are populated with your selections, click **Add**. This will add the module/role/ALC combination into the *Current Permissions* section.

NOTE: Only one ALC may be selected per row. To enroll as an AA for multiple ALCs, move through steps 6 and 7 as many times as needed, selecting a different ALC each time. Upon entering each ALC access request, verify that it appears in its own row under **Current Permissions**. To add AA access for additional ALCs at a later time, it will be necessary to follow the instructions in the Account Modification section of this quide.

If you need other IPAC roles outside of the AA designation, you can also select them from this screen by following the steps above.



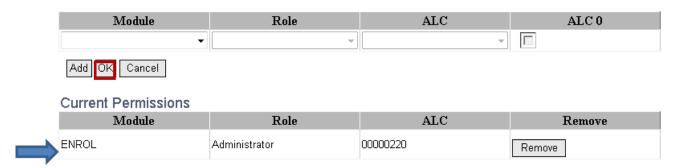
8. If you need other IPAC roles outside of the Agency Administrator designation, select them from this screen following the steps above. If selecting the RITSB module option, enter the RITS Payroll ID in the appropriate field of the ALC column (if the RITS Payroll ID field is populated, the ALC field below it should not be populated).



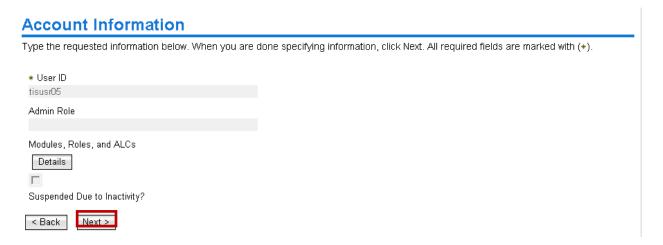


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9. When all needed module/role/ALC combinations appear in the **Current Permissions** section, click **OK**.



10. When the **Account Information** page reopens, click **Next**.



11. When the **Request Account: IPAC** page appears, click **Request Account**.





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12. When the Request Submitted: Request Account page appears, click View My Requests to view the status of the request.

Request Submitted: Request Account

You have submitted a request. Below is the information available to you at this time.

Request Detail

Request ID: 7632956883220539153 Date submitted: February 25, 2014 10:43:11 AM

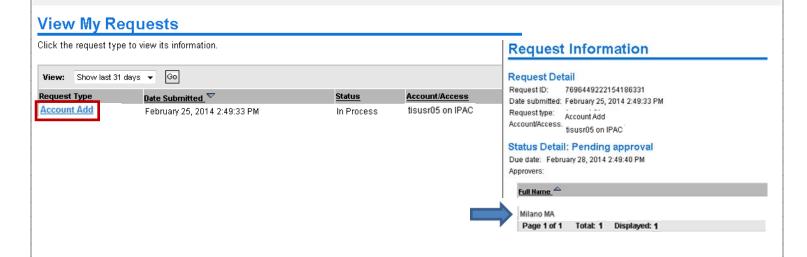
Request type: Account Add Account/Access: tisusr05 on IPAC

Related Tasks

- To review other activities, refer to the <u>Approve and Review Requests</u> age.
 To perform other tasks go to the <u>IBM Security Identity Manager Home</u> page.
- 13. When the View My Requests page opens, the status of the request will be visible. To view request details, click Account Add to access the Request Information page, including the list of approvers who are authorized to take action on the request. When the request has been completed (approved or rejected), the status will change accordingly.

IMPORTANT NOTE: Access requests are reviewed and approved/rejected on a case-by-case basis according to the ALC selected. For Agency Administrator (AA) access, each request will be sent to the Master Administrator (MA) for that ALC. If access requests for multiple ALCs are submitted, a separate access request will be sent to the appropriate MA for each ALC, even if the MA is the same for all ALCs to which access was requested.

Because access to multiple ALCs may be requested within a single submission, it is possible that a specific ALC access request within the submission may have been rejected by the MA for that ALC, even if the submission appears on the View My Requests page with a status of "Success." If you do not receive approval requests for any ALC to which you requested access, verify whether you have the AA role for that ALC. If not, you will need to resubmit a request for AA access to that ALC as described in the Account Modification section of this guide.





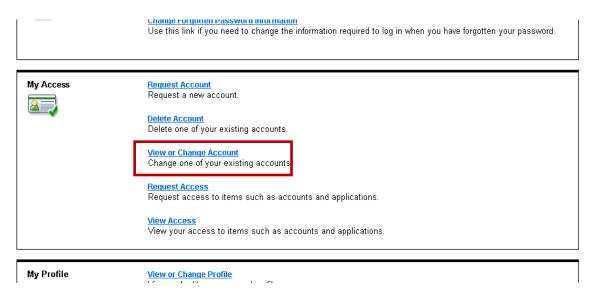
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Modifying Your User Account (For Users or Agency Administrators Only)

1. Access the ISIM Self-Service website at https://isim.fiscal.treasury.gov/itim/self. Enter your user ID and password, and then click **LOGIN**



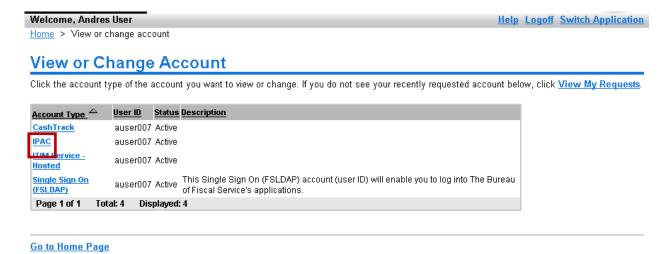
2. The Self-Service home page will load. To modify your account, click the **View or Change Account** link in the **My Access** section.



3. When the View or Change Account page opens, select the IPAC account type.



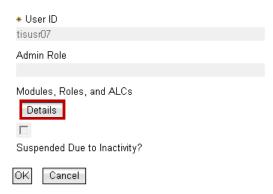
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4. When the Account Information page opens, click Details.

Account Information

Change the account information below. When you are done changing information, click OK. All required fields are marked with (*).

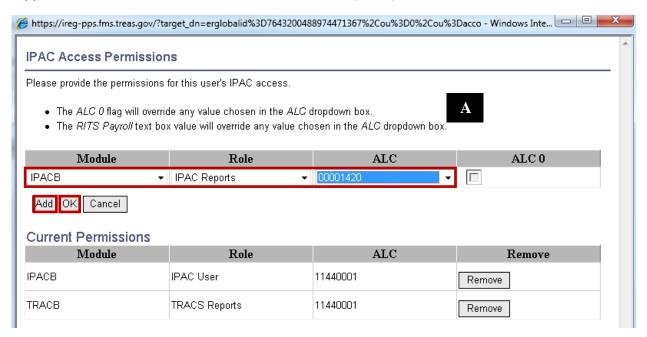


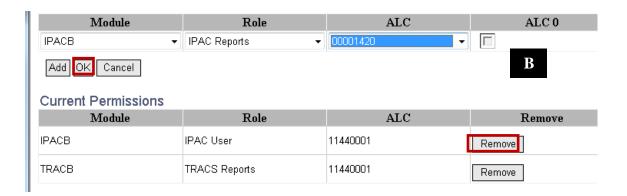


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5. **To add additional access:** When the **IPAC Access Permissions** page opens, navigate through each of the three dropdown menus to select the appropriate options in the **Module, Role,** and **ALC** fields, and then click **Add** then **OK** (see A).

To remove existing access: When the **IPAC Access Permissions** page opens, click the **Remove** button that corresponds with the ALC access you wish to remove from the account. After the row showing that ALC disappears from the **Current Permissions** list, click **OK** (see B).





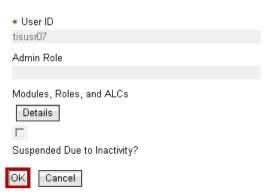


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6. When the **Account Information** page reopens, click **OK**.

Account Information

Change the account information below. When you are done changing information, click OK. All required fields are marked with (*).



7. When the **Request Submitted: Change Account** page appears, click **View My Requests** to view the Status of the request.

Request Submitted: Change Account

You have submitted a request. Below is the information available to you at this time.

Request Detail

Request ID: 8705474836176285629
Date submitted: February 28, 2014 8:05:05 AM

Request type: Account Change Access/Account: tisusr07 on IPAC

Information Updated

No changes were made.

Related Tasks

- To check on the status of your request, refer to the View My Requests page.
- To change another account, click View or Change Account
- To perform other tasks go to the Tivoli Identity Manager Home page.



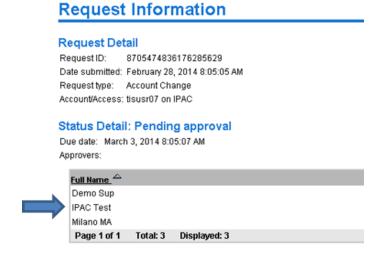
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8. When the **View My Requests** page opens, click **Account Change** to access the **Request Information** page, including the list of approvers who are authorized to take action on the request.

IMPORTANT NOTE: Access requests are reviewed and approved/rejected on a case-by-case basis according to the ALC selected. Each ALC has at least one Agency Administrator (AA) and one Master Administrator (MA) who approve access requests. If multiple module/role/ALC combinations are submitted, a separate access request will be sent to the appropriate AA/MA for the ALC from each combination, even if the AA(s)/MA(s) are the same for all ALCs to which access was requested.

Because access to a variety of module/role/ALC combinations may be requested within a single submission, it is possible that one of the combinations may have been rejected by the AA and/or MA for that ALC, even if the submission appears on the **View My Requests** page with a status of "Success." If you are unable to access IPAC with any module/role/ALC combination(s) you requested, you will need to resubmit an access request for the missing module/role/ALC combination(s) by recompleting steps 1-6 above.

View My Requests Click the request type to view its information. View: Show last 31 days Go Request Type Date Submitted Status Account/Access Account Change February 28, 2014 8:05:05 AM In Process tisusr07 on IPAC





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IPAC System User Roles and Functions

IPAC Module

User Role	Function Performed
User Kole	Function Performed
	Display messages
	Access to the following reports:
	Agency special requirements
	ALC Information
	ALC Information Download
	Headquarters transactions
	Headquarters transaction download
IPAC Reports	IPAC and zero dollar transactions
	IPAC transaction download
	Parent / child relationships
	Predecessor / Successor ALCs
	Sender required fields
	Treasury reporting requirements
	Review reports / data files
	Purge reports / data files
	Same access rights as the IPAC reports role, plus
	Process payment, collection, adjustment and zero dollar transactions
IPAC User	Complete incomplete transactions
	View status of agency special requirements request
	Add / edit SGL information to transactions received / sent
	Same access rights as the IPAC reports role, plus
	Request an update to agency billable status
TD 1 G G	View agency billable status
IPAC Supervisor	Request an update to agency special requirements
	View status of agency special requirements request
	Request establishment of a parent / child relationship
	Update agency information
Bulk File Submitter	Submit bulk IPAC transactions via IPAC on-line
	Review bulk file status information (including confirmation/error/rejection information)
	Display messages
	Review reports / data files
	Purge reports / data files



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Buy/Sell Module

User Role	Function Performed
Seller	 Display messages Access to Buy/Sell reports Process/Submit Agreements, Orders, Advances, Accruals, Invoices, and Adjustments Update Agreements, Orders, Accruals, Advances, Invoices, and Adjustments Modify Agreements and Orders Save Agreements, Orders, and Invoices Delete Agreements, Orders, and Invoices Approve/Reject Agreements, Orders, and Adjustments Cancel Agreements and Orders Inquire/Upload/Delete Supporting Documents Inquire Buyer Agency Profile
Buyer	 Display messages Access to Buy/Sell reports Update Agreements, Orders, Accruals, Advances and Adjustments Modify Agreements and Orders Approve/Reject Agreements, Orders, Advances, Invoices, and Adjustments Close Agreements Process/Submit Accrual and Adjustments Inquire/Upload/Delete Supporting Documents Inquire Buyer Agency Profile
Read Only	 Display messages Access to Buy/Sell reports Inquire on Agreements, Orders, Advances, Accruals, Invoices, Adjustments, Supporting Documents and Buyer Agency Profile
Agency Buy/Sell Supervisor	 Display messages Access to Buy/Sell reports Inquire on Agreements, Orders, Advances, Accruals, Invoices, Adjustments, and Supporting Documents Maintain Buyer Agency Profile

TRACS

User Role	Function Performed
TRACS Reports	Displays messages Access to TRACS Reports Review reports / data files Purge reports / data files



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RITS

User Role	Function Performed
RITS Accountant	Display messages View list of all health benefit codes Access to the following reports: Computer generated 2812 or 2812A Enrollment codes Holiday schedule Review reports / date files Purge reports / data files
RITS Payroll Clerk	Same access rights as the RITS Accountant role, plus • Manage 2812
RITS Payroll Admin	Same access rights as the RITS Accountant role, plus Manage 2812 Maintain payroll office / pay cycle
Bulk File Submitter	 Submit bulk 2812s vua RITS on-line Display messages Access to confirmation / rejection report Review reports / data files Purge reports / data files

Contact the Treasury Support Center at (877) 440-9476 or via email at IPAC@stls.frb.org if you have questions concerning the IPAC enrollment process.