Lesson 8: *SAMS Web*

Lesson Description

In Lesson 8 AFHCs and AFPCs will learn to provide and maintain security access to PCMS for the Fleet Card Program. This is the final lesson in the Fleet AFHC\AFPC training course.

Training Objectives

At the conclusion of this lesson, AFHCs and AFPCs will be able to:

1. Add or Drop Users
2. Insert or Remove Security Access Code (SAC) information
3. Modify Data
4. Change Passwords

Methodology

This lesson will be delivered using a combination of lecture, presentation and discussion. Group discussion and trainee interaction will be used to stimulate recall of policy information and establish a knowledge base on which to build in subsequent lessons.

References

(1) Fleet PCMS User's Guide, OPP&EP\PMT, June 2006
(2) SAMS User's Guide for the Fleet Card, OPP&EP\PMT, Rev. October 2004
(3) SAMS Training Guide for the Fleet Card, OPP&EP\PMT, Rev. October 2004

Enclosures

None.

I. SAMS Overview

Please turn off your monitor and give your attention to the instructor.

a. What is SAMS?

The Security Access Management System (SAMS) is a Web-based application used to establish user access to the Purchase Card Management System (PCMS) at the National Finance Center (NFC). SAMS provides a graphical user interface for entering security access requests online.

b. Workflow

The Agency Fleet Headquarters Coordinator (AFHC) contacts USDA Procurement Systems Division (PSD) via fax or e-mail for access to SAMS. The AFHC will be provided a User ID and Password to access SAMS.

The AFHC utilizes SAMS to establish Agency Fleet Program Coordinators (AFPC), Local Fleet Program Coordinators (LFPC), and Local Fleet Managers / Fleet Finance Managers (LFM). ACFO-FS Security Office will provide a pool of available User IDs in SAMS, on request, to assign to Users.

c. Software Installation

SAMS Web is a web-based application and does not require any software installation.

Notes:

II. Logging On to SAMS

Please turn off your monitor and give your attention to the instructor.

To Log in to the PCMS Web application, access the USDA PCMS web page at http://www.nfc.usda.gov/corporate/PCMS.htm

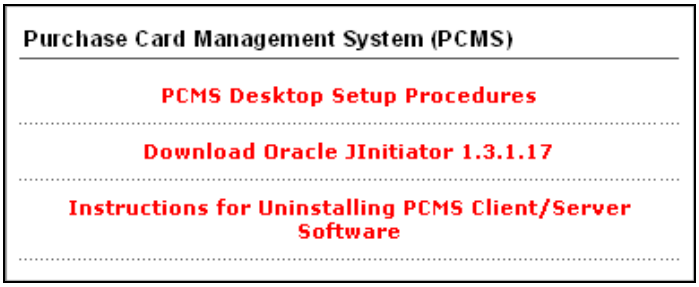
1. Click the active SAMS link under the **PCMS Production** heading.

An Oracle Forms Runtime window will open in another browser.

You may need to update your version of Oracle JInitiator to access the PCMS Web application. If a message displays asking to download JInitiatior, click Yes.

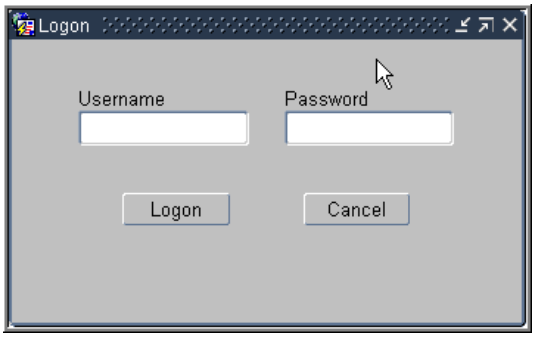
Or

If the page does not load when you click on the SAMS link.use the back button to return to the USDA PCMS web page and click the link to Download Oracle JInitiator 1.3.1.17.



2. When the Logon dialog box opens, enter your Username and password and click Logon.

   The Main Window will then open.



III. Main Window

Please turn off your monitor and give your attention to the instructor.

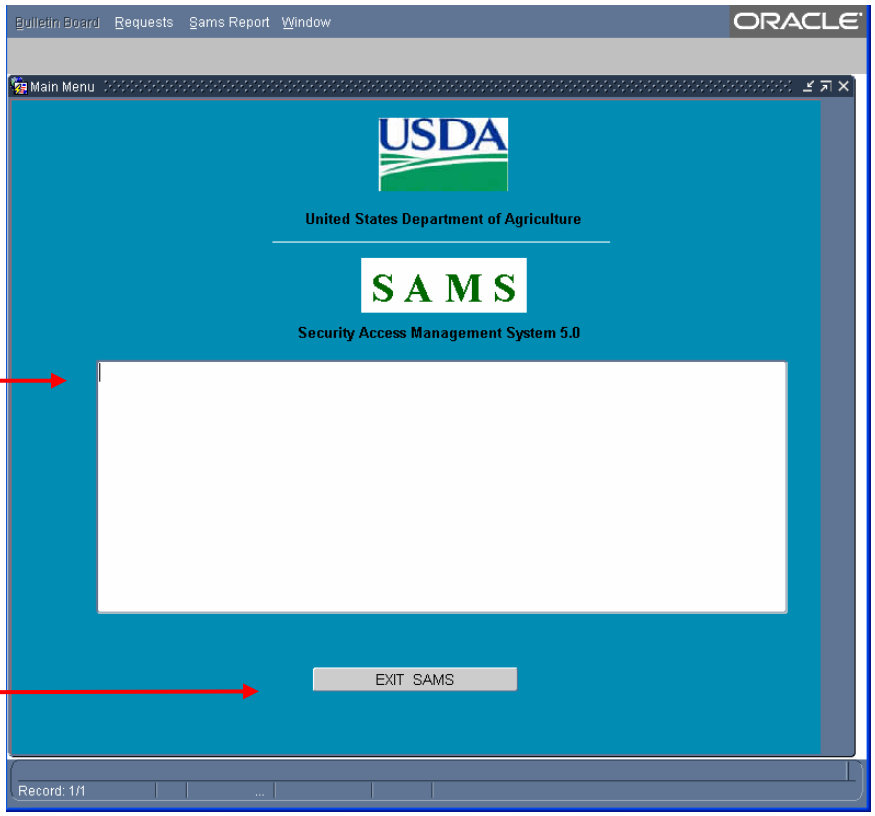
a. Main Window & Bulletin Board

Main Menu. Provides access to main functions in SAMS.

Bulletin Board. Displays news and messages about SAMS.

Exit Button. Closes application

Status Bar. Displays messages about the status of the current window.

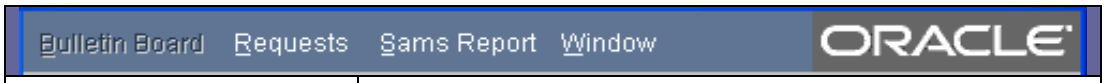


This is the main window in SAMS. The bulletin board located in the center of the window provides up-to-date news about SAMS.

The Bulletin Board function is only available to the DPC and system administrators. The Departmental Program Administrator (DPC) and System Administrators will utilize the *Bulletin Board* to provide current system-related information to SAMS users.

b. Main Menu

The main menu provides access to the major functions of SAMS.



Bulletin Board	The Departmental Program Administrator and System Administrators will utilize the Bulletin Board to provide current system-related information to SAMS users.
Requests	Use to add new users or modify or drop existing users to PCMS.
Sams Report	Generate a report of PCMS users with a specific date search.
Window	Move between open windows in SAMS.

Notes:

IV. Establishing Usernames

Please turn off your monitor and give your attention to the instructor.

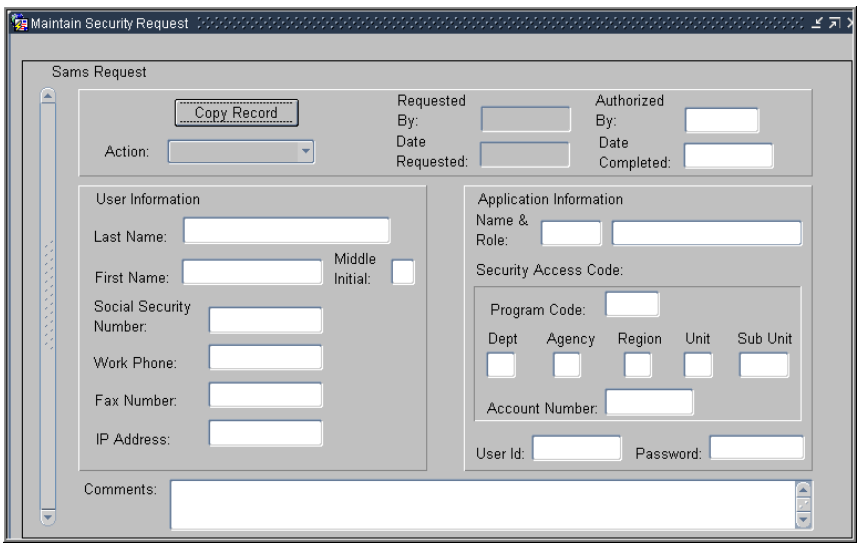
The information entered into SAMS is used to create a *Username* or *User Id*, role(s), security profile, and *Security Access Code* (SAC) information. The role (e.g. AFHC, LFPC, LFM, etc.) defines the PCMS options to which a user has access. The SAC, which defines the amount of information a user can see, may consist of any of the following: *Department Code*, *Agency Code*, *Region*, *Unit*, and *Sub Unit*.

If a PCMS user has a valid NFC System ID, he/she must provide existing User ID to be used in establishing any roles within PCMS.

DPCs use SAMS to request access to PCMS for AFHCs. AFHCs use SAMS to request access to PCMS for LFPCs and LFMs.

a. Requests

To access the Maintain Security Request window, request click Requests on the main menu.



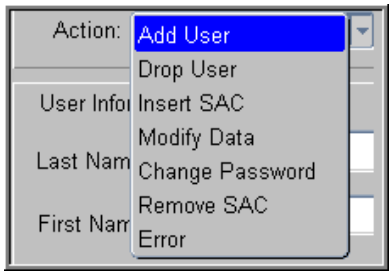
Enter details to initiate an access request.

b. Add a User

ACTION REQUEST

The first area of the window is the Action block. This contains information about the action requested.

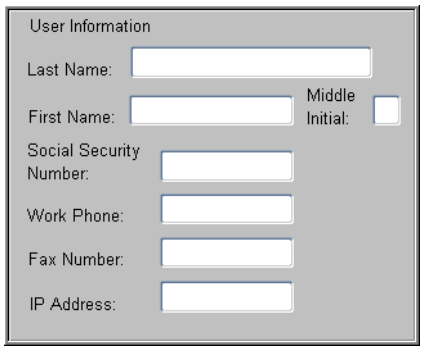
The first entry field in this section is **Action**. *Add user* is the default action. Click to open the drop-down list and review other options.



Requested By and **Date Requested** are automatically populated. **Authorized By** is an optional field where you may record the User Id of the authorizing individual. **Date Completed** will be entered automatically once the request is processed and accepted as part of a batch process.

USER INFORMATION

This block of the window is used to enter identifying and contact information on the subject of the request.

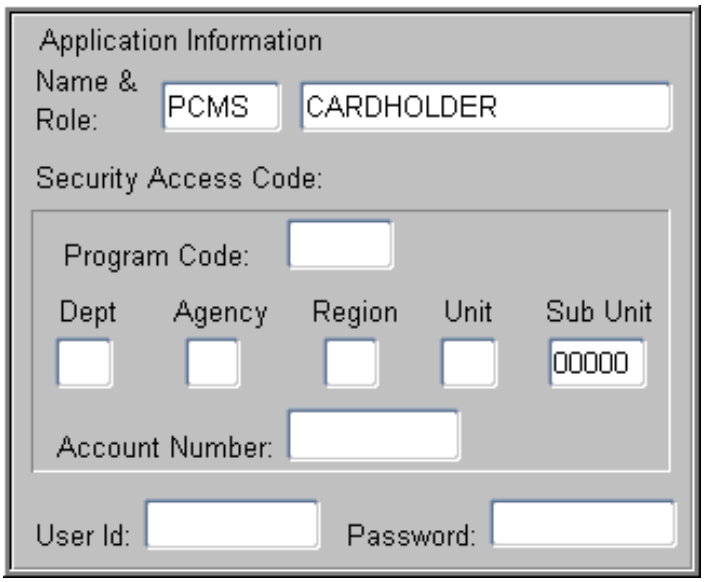


The following provides a brief description of the fields in the User Information block.

Fieldname	Required	Description
Last Name	Yes	The User's last name.
First Name	Yes	The User's first name.
Middle Initial	No	The User's middle initial.
Social Security Number	Yes	The User's 9-digit Social Security Number with no dashes or breaks. This is verified against Payroll information
Work Phone	Yes	The User's 10-digit work phone number with no parentheses, dashes or breaks.
Fax Number	Yes	The User's 10-digit fax number with no parentheses, dashes or breaks.
IP Address	No	The User's Internet Protocol (IP) address (e.g. 199.145.120.67)

APPLICATION INFORMATION

The *Application Information* block allows the AFHC/LFPC to establish or change a PCMS user's **Name & Role**, **Security Access Code**, **User Id** and/or **Password**.

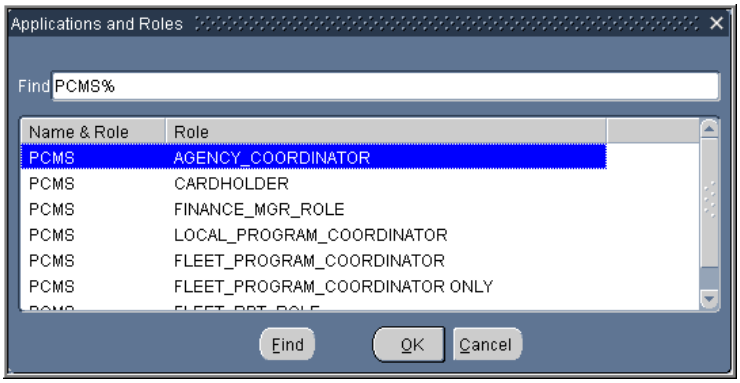


i) Name & Role

The system displays the default name & role "*PCMS / CARDHOLDER*." A *List of Values* is available for these fields.

Place your cursor in the **Name** field, where "*PCMS*" displays and click .

The Application and Roles selection box opens.



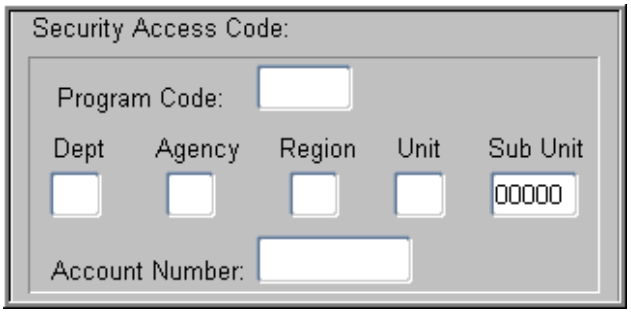
Scroll to select the correct Name & Role and click OK .

Apply the following rules when assigning user names.

- SAMS can only establish one (1) role per transaction. For more information on *Roles*, see Appendix A of Reference (2), *SAMS User's Guide for the Fleet Card*.
- Assign LFPCs role as FLEET_PROGRAM_COORDINATOR_ONLY.

ii) Security Access Code

AFPCs and LFPCs should only have access to those areas necessary for them to carry out their responsibilities. This access is governed by limiting PCMS users by appropriate **Department**, **Agency**, **Region**, **Unit**, **Sub Unit** and/or **Account Number**.

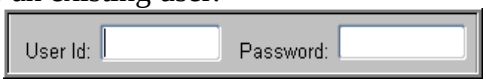


The following provides a brief description of the fields in the SAC area of the Application Information block.

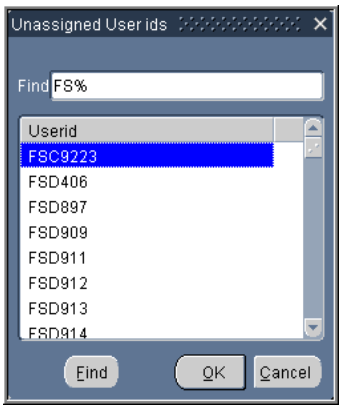
Fieldname	Required	Description
Program Code	Yes	A six-digit code automatically populated when *Name & Role* is selected.
Dept	Yes	A two-digit code that indicates the user's department. USDA's **Dept** code is **12**.
Agency	Yes	The two-digit **Agency** code.
Region	Yes	The two-digit **Region** code. If no **Region** is to be specified, enter **00**.
Unit	Yes	The two-digit **Unit** code. If no **Unit** is to be specified, enter **00**.
Sub Unit	Yes	The five-digit **Sub Unit** code. Use leading zeros if **Sub Unit** code is less than five-digits. If no **Sub Unit** is to be specified, enter **00000**.
Account Number	Yes	A default **Account Number** of **0000000000** will automatically be entered. Do not enter any other value in this field.

iii) User ID & Password

The combination of User ID and Password identify a unique system user and the functions the user can access. You can use the SAMS Security Request window to create a new user or assign a new role to an existing user.



New User
Follow these steps to create a user id for a new user who does not have a PCMS user id.



1. Place your cursor in the User ID field and click .

   The Unassigned User Id list opens.

2. Scroll to the desired User id and click OK .

   The system enters the user id in the field.

3. Tab or place your cursor in the Password field and enter a value.

Use the following rules when assigning passwords:

- A password must be at least 6 alphanumeric characters in length
- Must start with a letter.
- Must include at least one number.
- Cannot contain spaces.
- Must differ by at least 3 character from previous password.

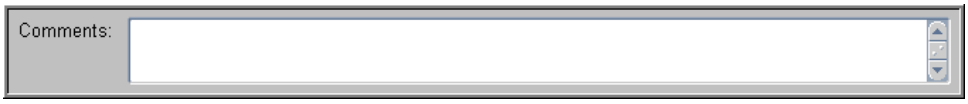
New Role for Existing User
Follow these steps to assign a new role for a user who already has a PCMS user id.

1. Place your cursor in the User ID
2. Enter the user's existing PCSM user id with an ***F*** appended to the end (e.g. FS123F)
3. Tab or place your cursor in the Password field and enter a value.

Fieldname	Required	Description
User Id	Yes	An identification code that uniquely identifies the user in the PCMS system.
Password	Yes	A string of 6 - 8 characters used to verify that the user is authorized to access the system.

iv) Comments

The final section of the Security Request window is the Comments block at the bottom of the window.

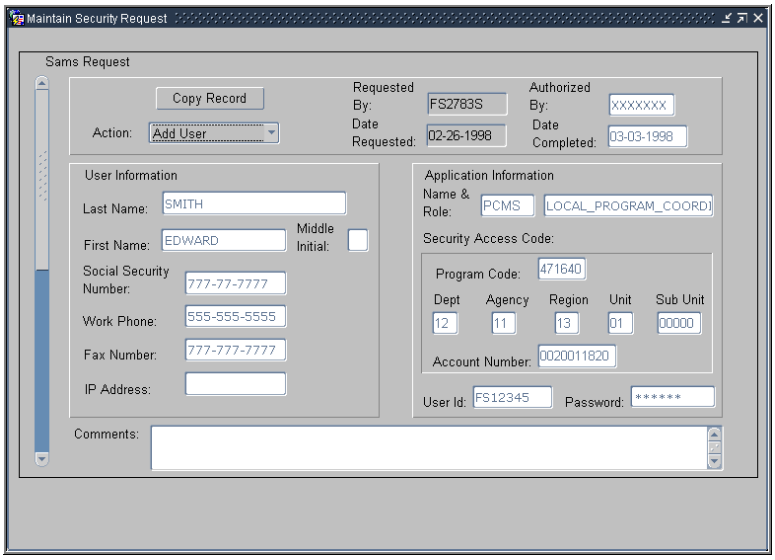


Use this area to enter any comments that may be useful in establishing a clear record.

c. Drop User

Before you can terminate (or drop) access for an LAPC, you must ensure all equipment records are transferred to another LAPC.

Follow these steps to drop a user



1. Click on the command bar.

   The record clears and you enter query mode.

2. Enter identifying information (such as user id, social security number, last name, etc.) for the user to delete and click .

   The user record displays.

3. Verify that the correct record displays.

4. Click Copy Record in the action block.

   The Copied Record message displays.

5. Click OK to create a copy of the retrieved record.

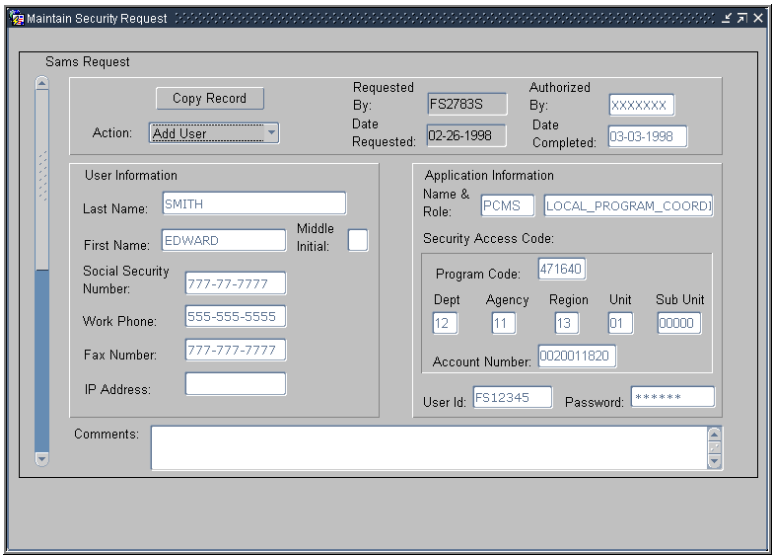
Note that the copied record now displayed is identical to the record retrieved, with two (2) exceptions: **Action** and **Date Completed** are now blank.

6. Click on the **Action** dropdown box and select **Drop User**.
7. Enter values in **Authorized By** and/or **Comments** (this is optional for both fields) and click .

d. Insert SAC

The **Insert SAC** action is used to provide the user with an additional SAC. This type of action may be utilized when, for example, an LAPC is assigned the oversight responsibility for an additional **Unit** or **Sub Unit**.

Follow these steps to insert SAC for an existing user.



1. Click on the command bar.

   The record clears and you enter query mode.

2. Enter identifying information (such as user id, social security number, last name, etc.) for the user to delete and click .

   The user record displays.

3. Verify that the correct record displays.

4. Click Copy Record in the action block.

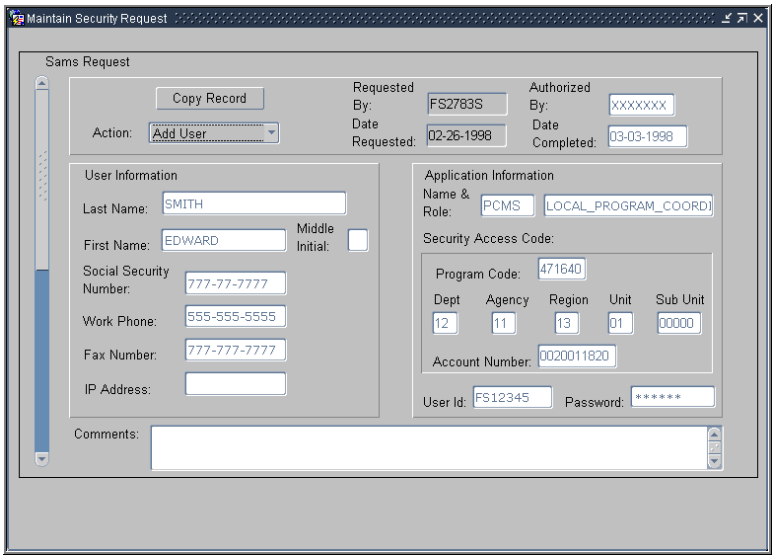
   The Copied Record message displays.

5. Click OK to create a copy of the retrieved record.
6. Click on the **Action** dropdown box and select **Insert SAC**.
7. Enter the additional SAC.
8. Enter any values in **Authorized By** and/or **Comments** (this is optional for both fields) and click .

e. Remove SAC

The *Remove SAC* action is used to remove an SAC that is no longer required, or one that may have been erroneously assigned. This action will not affect other, existing SACs. Prior to undertaking a *Remove SAC* action, ensure all records related to this User and SAC are attached to another User.

Follow these steps to insert SAC for an existing user.



1. Click on the command bar.

   The record clears and you enter query mode.

2. Enter identifying information (such as user id, social security number, last name, etc.) for the user to delete and click .

For the best result, enter the user id and SAC information (e.g. Unit or Sub Unit) to be removed.

The user record displays.

3. Verify that the correct record displays.

4. Click Copy Record in the action block.

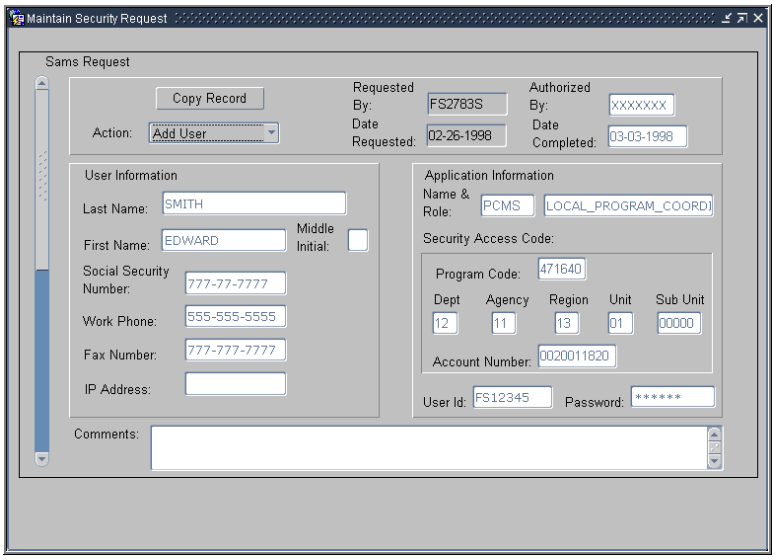
   The Copied Record message displays.

5. Click OK to create a copy of the retrieved record.
6. Click on the **Action** dropdown box and select **Remove SAC**.
7. Enter any values in **Authorized By** and/or **Comments** (this is optional for both fields) and click .

f. Modify Data

The *Modify data* operation is used to modify *User Information* displayed on the *Sams Request* page, such as *Last Name*, *First Name*, *Social Security Number*, or *Work Phone*.

Follow these steps to modify data for an existing user.



1. Click on the command bar.

   The record clears and you enter query mode.

2. Enter identifying information (such as user id, social security number, last name, etc.) for the user to delete and click .

For the best result, enter the user id.

The user record displays.

3. Verify that the correct, most current record copy of the record displays and that **Date Completed** is populated.

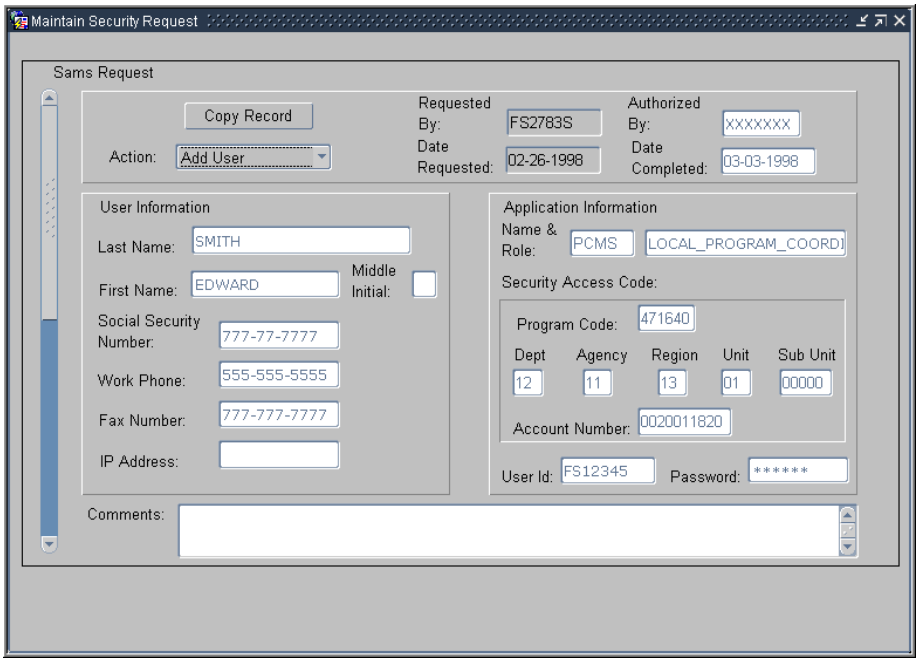
4. Click Copy Record in the action block.

   The Copied Record message displays.

5. Click OK to create a copy of the retrieved record.
6. Click on the **Action** dropdown box and select **Modify Data**.
7. Make the desired updates.
8. Enter any values in **Authorized By** and/or **Comments** (this is optional for both fields) and click .

g. Change Password

Periodically, Users will need assistance in changing their passwords. The *Change password* option in the *Action* field of the *Sams Request* page provides the ability to accomplish this necessary administrative task.



Follow these steps to modify data for an existing user.

1. Click on the command bar.

   The record clears and you enter query mode.

2. Enter identifying information (such as user id, social security number, last name, etc.) for the user to delete and click .

For the best result, enter the user id.

The user record displays.

3. Verify that the correct, most current record copy of the record displays and that **Date Completed** is populated.

4. Click Copy Record in the action block.

   The Copied Record message displays.

5. Click OK to create a copy of the retrieved record.
6. Click on the Action dropdown box and select **Change Password**.
7. Make the desired updates.

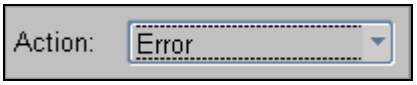
Use the following rules when assigning new passwords:

- A password must be at least 6 alphanumeric characters in length
- Must start with a letter.
- Must include at least one number.
- Cannot contain spaces.
- Must differ by at least 3 characters from previous password.

8. Enter any values in **Authorized By** and/or **Comments** (this is optional for both fields) and click .

h. Correct Error

In order to perform most of the operations listed in the **Action** field, it is necessary to first locate the most recent PCMS User record and then copy that record to perform an operation. When searching for most current PCMS User record for an action, if *"Error"* appears in the **Action** field, you may ***NOT*** proceed with a new operation until the *Error* is corrected.



The cause of the error is identified in **Comments** at the bottom of the window.

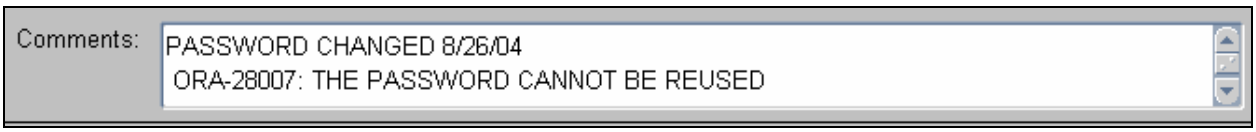


Figure 8-33

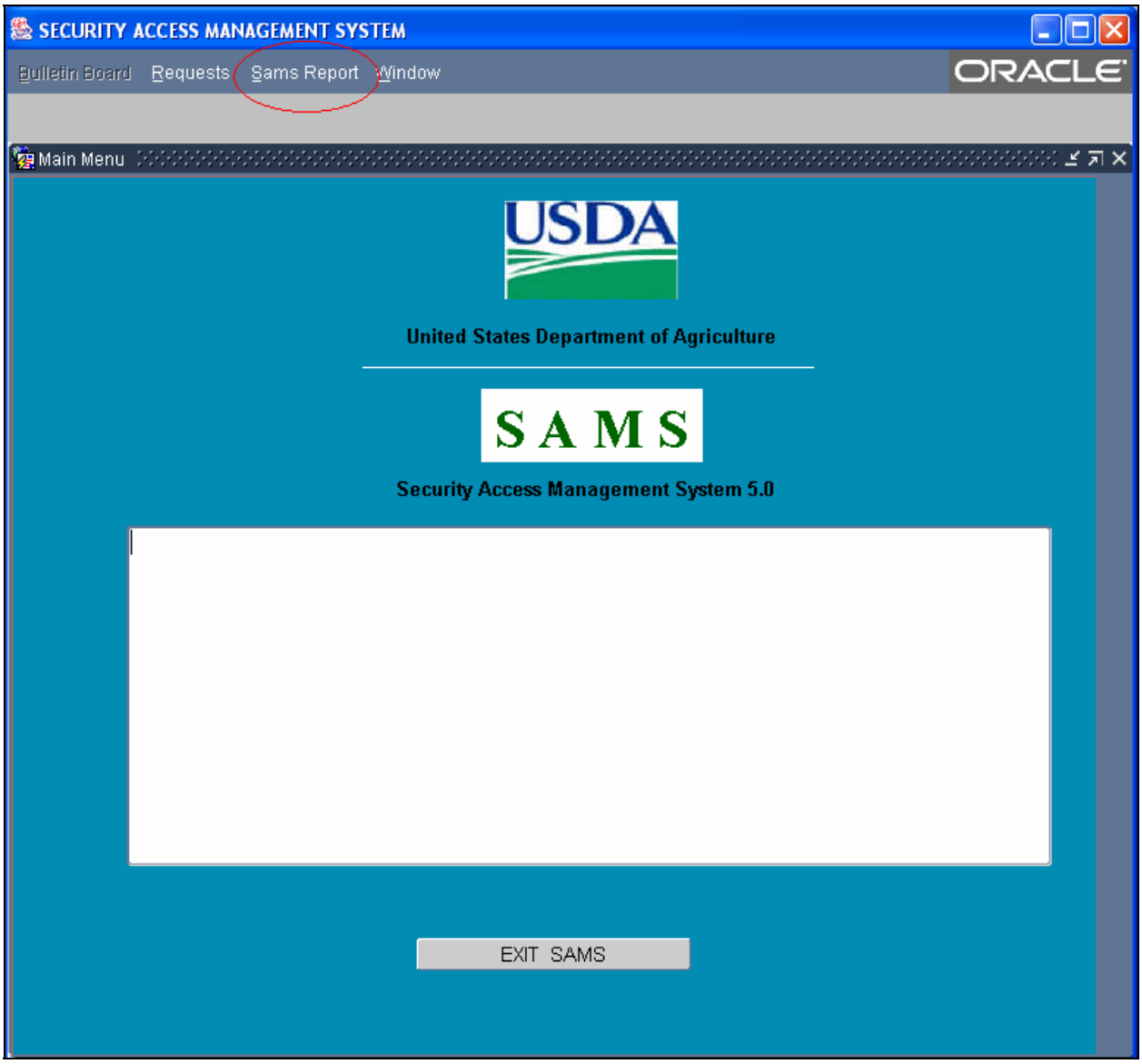
Correct the error by making a copy of the page, and then correcting the data entry that caused the error. Once the corrected transaction is complete and processed, the *"Error"* in the **Action** field will change to reflect the appropriate operation, e.g. *"Change password"* and the system will populate the **Date Completed** field.

V. Reports

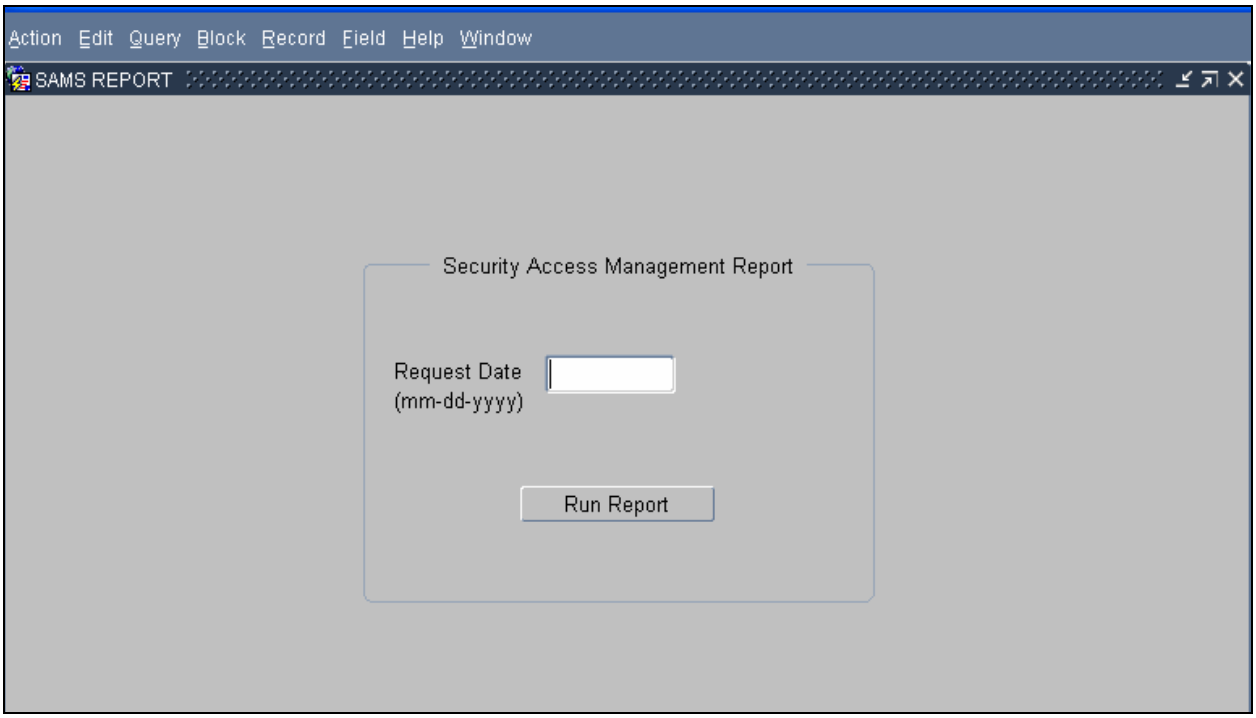
Please turn off your monitor and give your attention to the instructor.

To access SAMS' Report module click on

on the main menu bar.



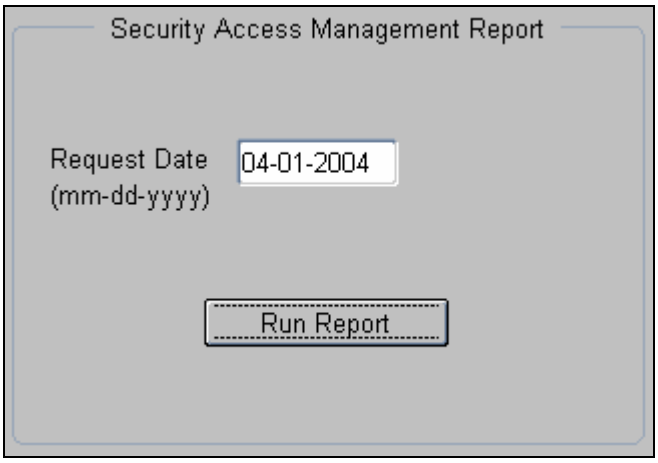
The SAMSs Report window will appear.



SAMs Report Sub-menu:

Fieldname	Description
Action	Perform actions such as save, clear, print and exit.
Edit	Edit field values.
Query	Execute a query.
Block	Navigate between blocks of information. (Not used on this window)
Record	Navigate between records. (Not used on this window)
Field	Navigate between fields.
Help	View a hotkeys menu.
Window	Move between open windows in SAMS.

To generate a report enter a **Request Date** and click Run Report.



When your report is competed, your results should appear in a separate window. Use the scroll bar to navigate between pages. The report can be saved to your desktop or printed, using the **File** menu. The *SSN*, *User ID* and *Account* columns have been truncated for security.

Notes:

A description of each of the columns in the SAMS Report is shown in Table 8-D below:

Fieldname	Description
Name	The assigned username (e.g., da014).
SSN	The Social Security Number of the user.
User Id	The User's system identification.
Role	User's role (e.g., CH = Cardholder).
Action	The Action Code: A – Add User D – Drop User I – Insert SAC M – Modify Data P – Change Password R – Remove SAC E - Error
Org	User's SAC
Bank	Program Code
Account	The last ten (10) digits of the Cardholder's purchase card account number.
Requested	Date action requested.
Completed	Date request batch-processed and completed.

PRACTICAL EXERCISE

1. Logon to SAMS using your username and password. Note any messages on the Bulletin Board.

2. Open the SAMS Security Requests window. Search for and locate the record of an individual using *Last Name* (at a minimum) as the search criteria.

4. Return to the Main Window and exit SAMS.

VI. Summary and Review

Please turn off your monitor and give your attention to the instructor.

1. What are the main functions the AFHC performs using SAMS?

2. What are the steps for an AFHC when setting up a new LFPC account? (Walk the instructor through the steps)

3. If a LFPC loses his/her password, how would the AFHC provide a new one?