Option 1 Create User

One of the main functions of the IPAC Agency Administrator is the creation of users for the IPAC system and the assignment and maintenance of the users' authorizations. There are a number of steps to establish a new user. You must enter the individual's name, employing agency and contact information to establish the user in the database. Then, to grant the user the authority to act within the IPAC System, you must assign roles to that user's account. Each role is a set of authorizations to act within a specific application (IPAC, RITS or TRACS or Admin applications) on behalf of a specific organizational entity (ALC or Payroll Office). A detailed list of user roles and functions may be found in *Appendix A.*

The information needed to create a new user is obtained directly from the completed IPAC User Request Form. IPAC User Request Forms can be obtained at FMS' IPAC Web Page at http://www.fms.treas.gov/goals/GOALS_IPAC.html or by calling the GOALS Customer Support Staff on (202) 874-8270.

To create a new user in the IPAC system, select the "Create User" button on the **Enrollment Main Menu** as shown in Figure 1.2.
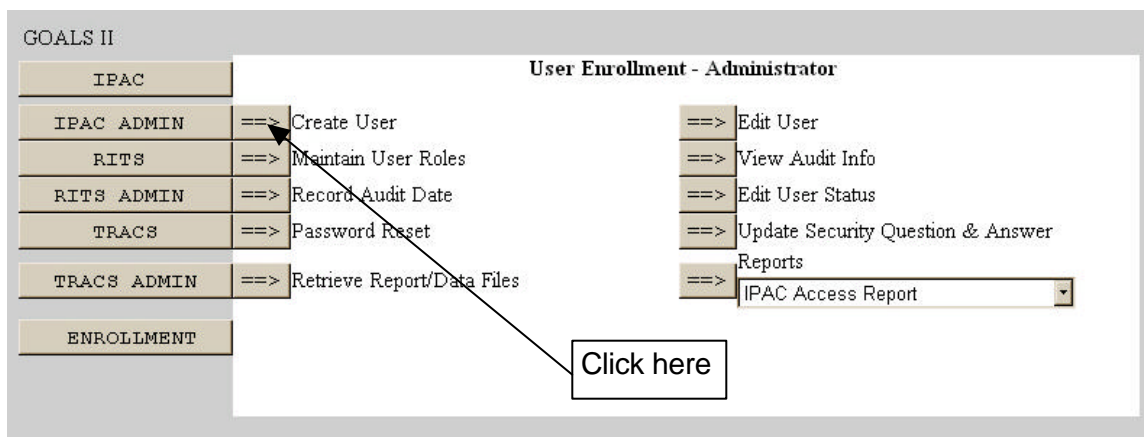

Figure 1.2   Enrollment Main Menu

 The screen shown in Figure 1.3, **Create/Edit User** will display with blank data entry fields for the entry of the new user's information and mailing address.

Create/Edit User

Figure 1.3   Create/Edit User

Position the cursor in the first data entry field to begin the data entry process. Use the "Tab" key to move forward between fields, "Shift-Tab" to move backward. An asterisk by the field label indicates that the field is required for the record to be entered into the IPAC database. All fields on this form, with the exception of "Mail Stop", are required.

Name:

First Name
Initial
Last Name

The name of the user to be granted access to one or more of the IPAC applications. Since the user's middle initial will be used by the IPAC System in creating a User Login ID, you MUST enter a middle initial. If the user has no middle initial, or you do not know the user's middle initial, use the first letter of the user's last name.

Employer:

Master ALC

This is the ALC of the user's employer. If the user has responsibility for more than one ALC, the master ALC is the user's primary ALC.

Login ID

There is no data box for this field when this screen is used for new user entry. A User Login ID will be generated by the IPAC system and will be assigned after you have completed the new user entry.

Contact Info:

Email Address

The user's email address for contact concerning IPAC system questions.

Complete Work Phone

The user's telephone number including area code (and country code if outside the USA). It is recommended that you use some formatting characters to make the telephone numbers easier to read, as in (202) 874-0000 or 202-874-0000.

Mailing Address:

Agency Name

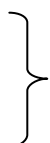The name of the user's employing agency.

Street

The first line of the mailing address.

Mail Stop

An optional address field which is used to enter an optional street address (different from the postal mailing address) or a second line, before the city and state, of the Street address.

City
State
ZipCode
Country

Fields for the appropriate sections of the user's mailing address.

Function Buttons

The following function buttons are available on the **Create/Edit User** screen:

"OK"

Accepts and saves the entries you have made. Displays the **Select Application** screen.

"Return To Enrollment Main Menu"

Returns you to the **Enrollment Main Menu** screen without saving any information you have entered on this screen.

"Clear"

> Restores the data entry fields to their values the last time the screen was
> displayed.

"Help"

> Displays the system help for this screen.

Press "OK" to accept the entries you have made. This will display the screen shown in
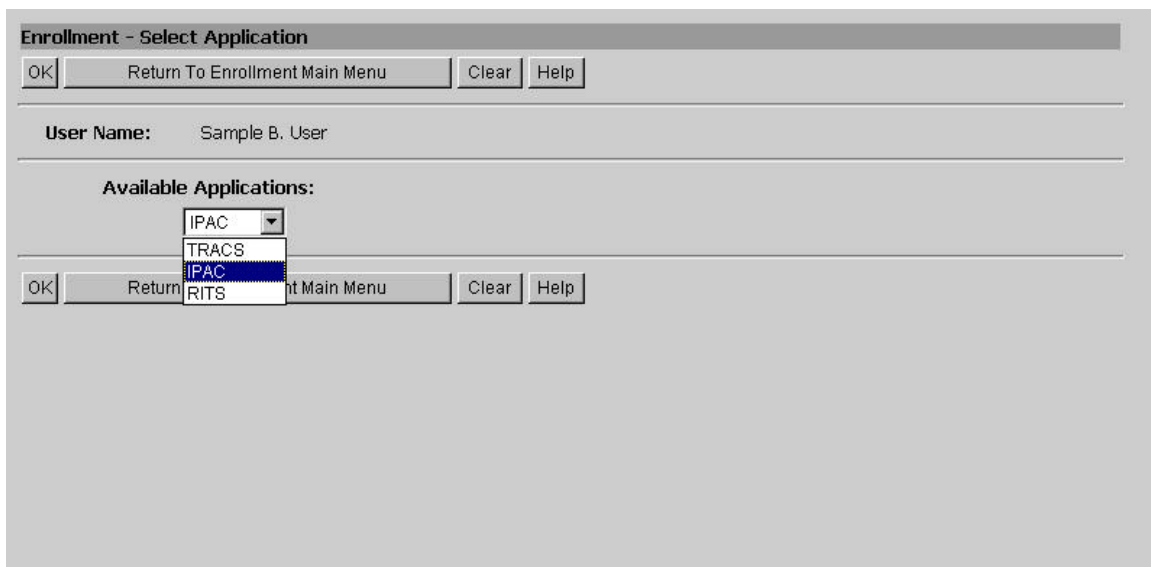Figure 1.4, **Select Application**.

Select Application

Figure 1.4   Select Application

The Available Applications data entry box contains a drop down menu of the available
applications for which you can assign roles for the user.

> IPAC (**I**ntra-governmental **P**ayment and **C**ollection) An Internet based GOALS II
> application for interagency payment and collections transactions.

> RITS (**R**etirement and **I**nsurance **T**ransfer **S**ystem) A GOALS II application used
> to automate the transfers of Federal employees' health benefit, retirement
> and life insurance program information and payments.

> TRACS (**T**reasury **R**eceivable **A**ccounting and **C**ollection **S**ystem) The Financial
> Management Service's (FMS) check claims application, developed to
> expedite the transfer of funds and associated financial information
> between FMS and Federal Program Agencies (FPAs).

This screen has the following function buttons:

"OK"
> Accepts and saves the application choice you have made. Displays the **Select Organization** screen.

"Return To Enrollment Main Menu"
> Returns you to the **Enrollment Main Menu** screen without saving the application information you have entered on this screen.

"Clear"
> Restores the data entry field to its value the last time the screen was displayed.

"Help"
> Displays the system help for this screen.

Select the application for which the user should receive authority, then select the "OK" button to display the **Select Organization** screen as shown in Figure 1.5.

Select Organization

| OK | Select Another Application | Return To Enrollment Main Menu | Clear | Help |

User Name: Sample B. User
Application: IPAC

ALC: 20180002

| OK | Select Another Application | Return To Enrollment Main Menu | Clear | Help |

Figure 1.5   Select Organization

This screen has a data entry box for "ALC" if the application is IPAC or TRACS, or a data entry box for "Payroll Office" if the selected application is RITS. Enter the ALC or Payroll Office for the user's authorization. This screen has the following function buttons:

"OK"
> Accepts and saves the entry you have made. Displays the **Change User Roles** screen.

"Select Another Application"
> Returns you to the **Select Application** screen without saving the information you have entered.

"Return To Enrollment Main Menu"
> Returns you to the **Enrollment Main Menu** screen without saving the organization information you have entered on this screen.

"Clear"
> Restores the data entry field to its value the last time the screen was displayed.

"Help"
> Displays the system help for this screen.

Select the "OK" button to save the organization information and display the screen in Figure 1.6, **Change User Roles**.

Change User Roles

Figure 1.6   Change User Roles

This screen lists any roles currently assigned to the user (initially none). Current roles will be listed in a table described in this manual in Option 2 Maintain User Roles. The **Change User Roles** screen offers the following function buttons:

"Submit"
> Accepts any new entries and submits the user roles displayed on this screen to the IPAC database. If these roles are accepted the screen in Figure 1.9, **Enrollment – User Roles Confirmation**, will display.

"Add Role"
> Displays the **Enrollment – Add Role** screen shown in Figure 1.7.

"Select Another Organization"
> Returns you to the **Select Organization** screen shown in Figure 1.5 to allow you to enter another ALC or Payroll Office for this application.

"Return To Enrollment Main Menu"
> Returns you to the **Enrollment Main Menu** screen without saving any new roles you may have entered on this screen.

"Help"
> Displays the system help for this screen.

Select the "Add Role" button to add a new role for this user. The **Add Role** screen in shown in Figure 1.7, will display.

Add Role

Figure 1.7   Add Role

The data entry field on this screen, <u>Available Roles:</u>, contains a drop down menu with a list of the roles which you may assign to this user for this application. Click the arrow to the right of the field to expose the menu. Highlight the appropriate role to select it into the data entry box. A complete list of user roles and responsibilities for the various IPAC applications is included in *Appendix A*. The **Add Role** screen has the following function buttons:

> **"OK"**
>> Accepts the role you have selected. Displays the **Change User Roles** screen shown in Figure 1.6.

> **"Cancel"**
>> Returns you to the **Change User Roles** screen without saving the role you selected.

> **"Return To Enrollment Main Menu"**
>> Returns you to the **Enrollment Main Menu** screen without saving the role you have selected.

> **"Clear"**
>> Restores the data entry field to its value the last time the screen was displayed.

> **"Help"**
>> Displays the system help for this screen.

Select one of the available roles from the drop down menu, then select "OK" to accept the user role displayed in the <u>Available Roles:</u> data entry box. This will display the screen shown in Figure 1.8, **Change User Roles,** with the role you have just selected added to the screen.

Change User Roles

Enrollment - Change User Roles

| Submit | Add Role | Select Another Organization | Return To Enrollment Main Menu | Help |

User Name: Sample B. User
Organization: 20180002
Application: IPACA

Delete	User Role
No	GOALS Analyst

| Submit | Add Role | Select Another Organization | Return To Enrollment Main Menu | Help |

Figure 1.8   Change User Roles

At this point, the user role on which you have been working has been defined but not confirmed. Additional roles can be added for this user by selecting the "Add Role" button and following the procedures listed earlier. Existing roles can also be deleted using this screen as explained in this manual in Option 2 *Maintain User Roles*.

User Roles Confirmation

To save the role(s) just entered to the user's account, select "Submit". If this role(s) is accepted, the screen in Figure 1.9, **User Roles Confirmation**, will display.

Enrollment - User Roles Confirmation

| Return To Enrollment Main Menu | Help |

User roles have been updated.

| Return To Enrollment Main Menu | Help |

Figure 1.9   User Roles Confirmation

This screen confirms that the data has been added to the database and the user's account has been updated. Click "Return to Enrollment Main Menu" for more menu options.

After the User Roles Confirmation screen has been received, the user has been registered to use the IPAC system and their system generated Login ID has been created. Then the user's initial password must be established using *Option 4 Password Reset* from the **Enrollment Main Menu**.

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