



Intra-governmental Payment and Collection System

Version 1.0

IPAC Agency Administrator Enrollment User Manual



Department of the Treasury

Financial Management Service



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http://www.fms.treas.gov/goals/GOALS_IPAC.html

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Introduction

What is IPAC Enrollment?

GOALS II (Government On-Line Accounting Link System II) is the telecommunications network that provides automated financial reporting directly to the Department of the Treasury, Financial Management Service (FMS).

The **IPAC (Intergovernmental Payment and Collection) System**, a component of GOALS II, is a group of applications designed to facilitate the intra-governmental transfer of Federal Government funds. There are several components to the IPAC suite of applications:

- **IPAC**, managed by FMS (**Financial Management Service**, Department of the Treasury), handles payments between agencies.
- **IPAC Administration** handles administration and security for the IPAC Base module.
- **RITS (Retirement and Insurance Transfer System)** handles agency retirement and insurance payments to **OPM (Office of Personnel Management)**.
- **RITS Administration** handles administration and security for the RITS base module.
- **TRACS (Treasury Receivables Accounting Collection System)** is the FMS check claims application.
- **TRACS Administration** handles administration and security for the TRACS base module.
- **Enrollment** handles the administration and security for the entire IPAC system.

The **Enrollment** application is the User Administration function for the IPAC application suite and has been implemented as a separate and distinct component of the IPAC System. The Enrollment facility is designed to be flexible to meet a wide range of organizational needs. It will be managed by FMS with operational backup from **FRB (Federal Reserve Bank) CBAF (Central Bank Administration Function)**.

IPAC System Requirements

To use the IPAC System, the computer must have:

- Access to the Internet

- A browser with 128-bit encryption - Microsoft Internet Explorer 4.0 or higher or Netscape 4.0 or higher
- The browser must have cookies enabled
- Software to view Portable Document Format (PDF) files (such as Adobe Acrobat™)

About this Manual

This Guide's Audience

This Manual is intended for users of the IPAC system Enrollment application. The intention of this manual is to describe the Enrollment element of IPAC system in its entirety, though individual users will only have access to the screens and functions that are authorized by the role associated with their Login ID.

Assumptions

It is assumed that the users for whom this manual was written are familiar with the following:

- The use of a personal computer in a Windows environment.
- The basics of the Internet and the Internet browser they will be using.
- The user roles within their organization.

Administrators

Users designated as a **Master Administrator** or an **IPAC Agency Administrator (IAA)** are the only ones authorized to use the Enrollment application. The organizational assignment of these roles is as follows:

- **IPAC Agency Administrator** Agency level authorization.
- **Master Administrator** FMS/FRB (CBAF) level authorization.

As Master Administrators, FMS (with FRB CBAF backup) will establish and maintain Agency Administrator accounts and set certain parameters within IPAC.

As IPAC Agency Administrators, agency personnel will establish and maintain agency User accounts and request certain settings from FMS for their agency.

A definition of each of these Administrative roles follows.

IPAC Agency Administrator (IAA)

The IAA's are responsible for the creation and management of user accounts for their agencies. They will define users of the system for each IPAC organizational entity (ALC or Payroll Office) within the IPAC system.

Users designated as an Administrator at the Agency level should only be authorized to access this Enrollment application, and not the other IPAC applications, to ensure the separation of responsibility required in enterprise applications. In practice, there is nothing to keep an IPAC Agency Administrator from setting up another User ID for himself as an Application User. Dual access is an Agency internal control issue based on security policy. This administrative authority is delegated by FMS to the Agency organization owning or managing the IPAC entities.

Design assumptions for the Enrollment application were that most agencies have networks or applications that require User Access controls and a business organization to establish and manage that access. In these organizations, the IPAC Agency Administrator function would easily fit into the existing User Administration organization. In organizations that do not have this organizational structure, this role could be assigned to any appropriate individual or group within the organization, again with the view that a separation of responsibility should be considered. Individuals acting as Administrators should be designated in writing by an appropriate level of management to assure FMS that proper review and consideration is given to this assignment.

The Enrollment application is designed to allow the definition of one or more IPAC Agency Administrators. The scope of authority for each administrator can be limited by:

- organizational entity (ALC or Payroll Office)
- application

This will provide the Agency or FMS maximum flexibility in structuring the authority of each administrator. Once the Administrator's scope of authority is defined, he may only create and administer user accounts within that scope.

The IPAC Agency Administrator's primary system responsibilities are the creation of user accounts and enforcement of the system security policy. This includes the assignment and periodic review of user access to ensure that all granted authority is warranted and proper.

Authorities and Responsibilities of the IPAC Agency Administrator role:

- Establishment, maintenance and management of Application User accounts that are within the defined scope of authority.
- Adding and deleting users, and updating user profiles on an as needed basis after system implementation.
- Administering the password process for agency users.

- Conducting quarterly access audits for your organizations.
- Ensuring that IPAC users follow system procedures.

Master Administrator

The Master Administrator role is intended for use by FMS personnel responsible for IPAC system administration. As an operational backup, individuals in the FRB CBAF should also have authority to act as Master Administrators.

This role is a “super” IPAC Agency Administrator. Master Administrators can execute all IPAC Agency Administrator functions for any organizational entity.

Authorities and Responsibilities of the Master Administrator role:

- Establishment, maintenance and management of IPAC Agency Administrator and Application User accounts.
- Establishment, maintenance and management of Master Administrator accounts (peer relationships).
- Password management, including initial password creation and password resets.
- Review and enforcement of agency level quarterly access audits.
- Provision of administration across all organizational entities, applications, and role boundaries.

Organization of this Manual

The description of the IPAC Agency Administrator role will be subdivided into sections that describe the processes available under each menu choice for the menu shown to an IPAC Agency Administrator. The manual will include screen views to insure that the correct paths are being followed.

The manual also contains this Introduction, which discusses the purpose of the manual, it's intended audience and some of the functions common to the Enrollment application, a table of contents, a glossary, several other appendices and an index.

Conventions Used in this Manual

The following conventions are used throughout the manual:

- References to **screen names** will appear in bold print (i.e. **Enrollment Main Menu**).
- Names of **screen buttons** will be in “quotes”.
- References to **field names** on a screen will be underlined.
- References to **other sections** of this manual will be in *italics*.

Conventions Used in the Enrollment Application

Title Bars

As you use the Enrollment application, the title bars on your screen will help you keep track of your location within the application. Once you leave the **Enrollment Main Menu**, the title bar of each screen contains the name of the function under that application in which you are working, as shown in Figure I.1.

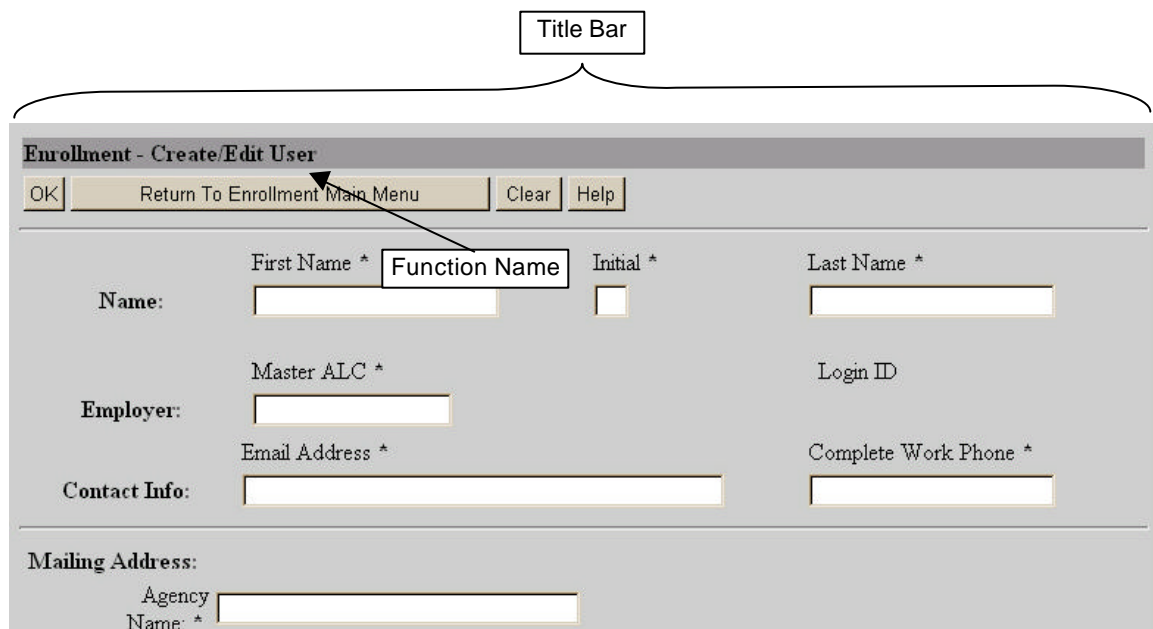


Figure I.1 Title Bar

Browser Buttons

You must **not** use the “Back” and “Forward” buttons of your **browser** to navigate through the Enrollment screens. The programs expect data to be submitted in specific sequence and using the browser navigation buttons can result in activation of intruder detection

software. If you accidentally hit the back button of the browser, you will be returned to the **IPAC System Main Menu** with none of the data entered on your most recent screen being saved to the database.

Cursor Movement

When a screen first appears, you must click to position the cursor in the first data entry field or menu selection. You may continue to position the cursor with the mouse, or you may use the "Tab" key to move forward between fields, "Shift"-Tab" to move backward. You **must** use a button to submit data to the IPAC database.

Hitting the Enter key while in a data entry field is **NOT** the same as clicking the "OK" button, the Submit button, or other IPAC screen buttons. If you would like to use the keyboard rather than mouse to click a button, then use the Tab key to move the focus to the button ("OK", "Submit", etc.) and then hit Enter.

Standard Buttons

Standard buttons have been established for use throughout the Enrollment application. Their availability may vary as needed by the function being performed, but when they appear they will always behave in a consistent fashion. They typically include "**Clear**", "**Help**", "**OK**", and "**Return to Enrollment Main Menu**". Additional buttons will be included as needed by specific areas of the program.

Explanation of Standard Buttons

"Clear"

All of the data entry fields which you have modified since the last time the screen was displayed are returned to their former values. No data is submitted to the database.

"Help"

A new browser window is opened and page level, context sensitive help for the current screen is displayed. After reading and/or printing the help screen, you should close the help window by using its "**Return**" button to go back to the previous screen. (The "Back" button on your browser will not be functional on the help screen since this is a new window with no history.)

"OK"

This acknowledges that you have read any message on the current screen and are prepared to submit any data just entered. The data is submitted, the message screen disappears and you are returned to the previous screen or to a previous menu.

“Return to Enrollment Main Menu”

No data entered on the current screen will be saved. You will be returned to the **Enrollment Main Menu**.

Formats

Button Formats

Because screen presentation is influenced solely by the browser configuration, all **function buttons will display at both the top and the bottom of all IPAC screens**. Either set may be used depending on your location and preference as shown in Figure I.2.

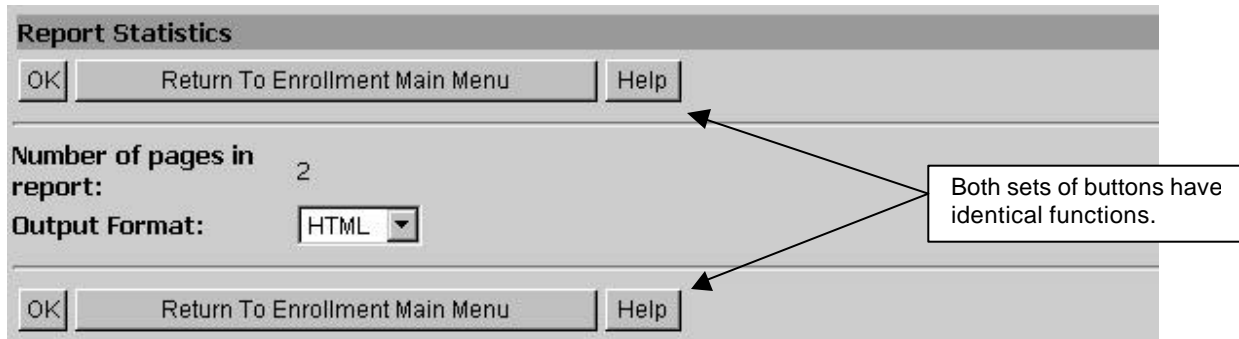


Figure I.2 Function Button Locations

Date Formats

When entering dates in IPAC, the format is **YYYY-MM-DD** (2001-06-22 for June 22, 2001). The IPAC system will not recognize a date entered in another format as valid.

Telephone Number Formats

Since the IPAC application is distributed world wide, there is no “mask” to automatically format telephone numbers in Enrollment. They will be displayed exactly as you enter them. Since all telephone numbers entered should include your area code (and country code for foreign exchanges), it is recommended that you use some formatting characters to make the telephone numbers easier to read, as in (804) 555-1212 or 804-555-1212.

Asterisks for Required Fields

Most data entry screens contain required fields. These fields **MUST** be completed before the data on the current screen will be accepted and recorded in the database. In

IPAC Enrollment, these fields will be indicated with an asterisk on the screen after the field label.

Error Messages

An error message is generated to tell you that the action you have taken is improper, or the data you have entered is incorrect. Typically, the Enrollment Error Messages will tell you the nature of the error that you have made. Error messages appear in a separate browser window. **Error Message** windows are typically small, and the same **Error Message** window is reused without being cleared until you specifically close that window. This means that error messages will continue to accumulate as the window is called for additional message display. Since this can be confusing, it is advisable for you to close the Error Message window when you have read and understood the information provided. A sample **Error Message** is shown in Figure I.3.

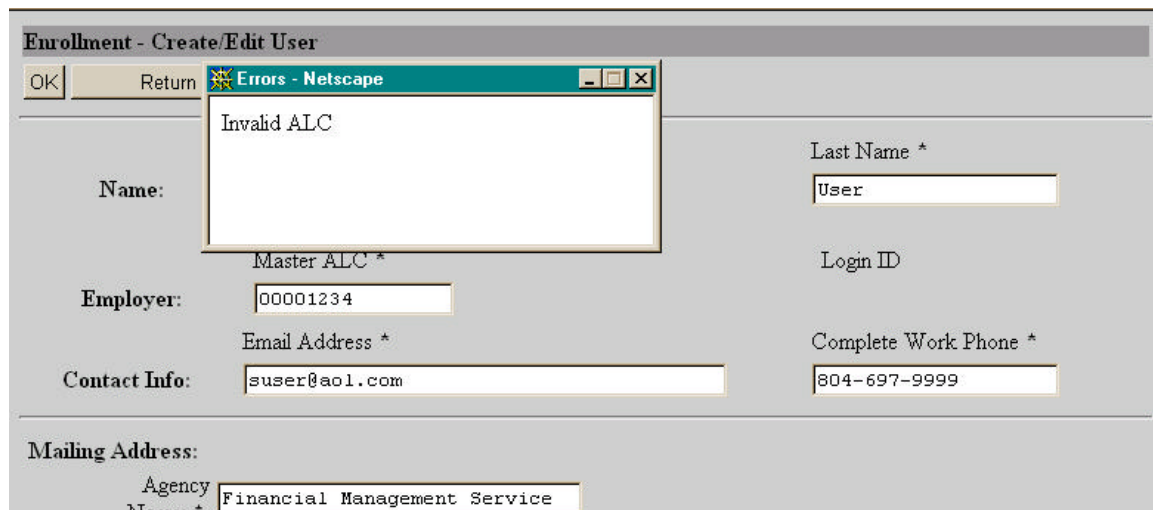


Figure I.3 Error Message

Whenever you receive an error message, the submission causing the error is returned to you unprocessed. In the example shown in Figure I.3, the request to create a user profile is NOT submitted. To resubmit:

- Close the error box.
- Correct the error.
- Select the “OK” button again.

Retrieving User Records

One of the major responsibilities of an Administrator in the Enrollment application is the maintenance of user accounts within the IPAC System. To make changes to the status of an existing User, you must first locate that User’s record within the IPAC database

and retrieve the record for editing. The screens used for locating and retrieving user records are consistent within the Enrollment application.

When you choose a function from the **Enrollment Main Menu** which allows you to make changes to a current User's account (such as "Edit User" or "Maintain User Roles"), the next screen displayed will be the Find User screen shown in Figure I.4.

Find User Screen

Figure I.4 Find User

Find User Data Entry fields:

The **Find User** screen has two data entry boxes:

Login ID:

The Login ID of the user whose record you want to retrieve

Last name:

The last name, or first few letters of the last name, of the user whose record you want to locate.

You will only use one of these data entry boxes at a time. This screen allows you to directly retrieve a user's record through his **Login ID** or look for the user's record using all or part of the user's **Last name**.

If you know the user's Login ID, then it will be faster to retrieve the user's record directly. Simply enter the user's Login ID in the data entry box labeled **Login ID** and select the "**Find by LoginId**" function button.

If you do not know the user's Login ID, you can look for the user's record using the user's last name. Enter the user's last name, or the first few letters of the last name in the data entry box labeled **Last Name** and select the "**Find by Name**" function button. This will allow you to display a list of users, the beginning of whose last names match the pattern of letters you entered.

Find User Function Buttons

The **Find User** screen has the following function buttons:

“Find by LoginID”

When you know the user’s Login ID you can retrieve his record directly by entering the user’s Login ID in the **LoginID** data entry box and selecting this function button to retrieve the user’s record.

“Find by Name”

Enter the last name, or the beginning of the last name, of the user whose record you want to locate and select this function button. The **Select User** screen, shown in Figure I.5 will display with a list of users whose name begins with the letters you entered in the **Last Name:** data entry box.

“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.

If you select the “**Find by Name**” button, the **Select User** screen (see Figure I.5) will display with a list of registered users whose last name begins with the letters you entered in the data entry box labeled “**Last name:**”. Selecting “Find by Name” without entering any letters into the **Last Name:** data entry box will display a list of all registered users of the IPAC system. This may take a considerable time. The more letters you enter in this data entry box, the more you restrict your search and the more manageable your selection list will be.

	Users name	Login Ids	Security Level
<input type="radio"/>	Doe, Jane A.	e1jad001	user
<input type="radio"/>	Doe, Jane A.	e1jad002	user

Figure I.5 Select User

Select User Screen

The **Select User** screen, shown in Figure I.5, allows you to select the user record that you want to edit from a list of records that match the criteria you entered in the LoginID box on the **Find User** screen.

Select User Data Fields

This list has columns with the following data fields:

Selection Option Button

An option button which may be marked to indicate your selection of the record in that row as the one you wish to retrieve. These buttons are mutually exclusive and only one button may be selected at a time. Selection of another button will unmark your previous selection.

Users name

The name under which the user was registered with the IPAC System.

Login Ids

Any Login IDs assigned to the user.

Security Level

The Security Level (user or administrator) that has been granted to the user.

Select User Function Buttons

“Select”

Selects the user record indicated by the marked option button. One row must be marked by a selected option button or selecting this function will generate an error message.

“Cancel”

Discards any selections you have made on this screen and displays the **Find User** screen.

“Return To Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without saving any information entered.

“Clear”

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

“Help”

Displays the system help for this screen.

Selecting the “Select” button on the **Select User** screen or the **Find by Name** button on the **Find User** screen will retrieve the user record for use with the function in which you are working.

Viewing and Printing Documents

Common conventions are used throughout the Enrollment application for printing documents and reports. When you select a report to be generated, you will be forwarded to a report printing screen where the data just entered will appear as a document and may be printed. First, you will see a Report File Description and Footer Comments entry screen referred to in this manual as the **Report Request** screen. Then the **Report Statistics** screen displays, which has several output options as discussed below.

Report File Description / Footer Comments (Report Request) Screen

When you select a report to be generated, the next screen to display is the **Report Request** screen. The entry of a Report File Description and Footer Comments for the report is available, as shown in Figure I.6. This screen may also allow you to enter restrictive criteria to limit the data retrieved by the report. The title of this screen will vary depending on the location in the Enrollment application, but the appearance and functionality of the screen will be consistent.

The screenshot shows a web interface titled "User Activity Report". At the top, there is a navigation bar with four buttons: "Select Specific User", "Clear", "Return To Enrollment Main Menu", and "Help". Below this, the main form area contains several input fields: a large text area for "Report File Description", two date input fields for "Start Date" and "End Date" (both marked as optional), and a text input field for "Footer Comments". At the bottom of the form area, there is another set of navigation buttons: "Select Specific User", "Clear", "Return To Enrollment Main Menu", and "Help".

Figure I.6 Report File Description/Footer Comments

Data Entry Fields Common to All Report Request Screens

There are two data entry fields on this screen which are common to all report request screens in the Enrollment application. You are not required to complete either field, but it is highly recommended that the Report File Description field be completed.

Report File Description

This field is used to name and/or describe the report. It will be this name or description that displays in the system when a report is later retrieved for viewing, printing or deleting. The description that is assigned to the report should be as meaningful as possible to help with later report identification. This description does not print on the report itself.

Footer Comments

This field is printed on the bottom of each page of the document or report. Figure I.7 shows a sample report with the location of the Footer Comments marked.

USER ACTIVITY
09/01/2001 THROUGH 09/10/2001

All Application Activity for Login e1jad001

Date	Time	Controller Name	Organization	Organization Type	Elapsed Time (in seconds)
09/04/2001	10:44:34	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.813
09/04/2001	10:52:27	org.frb.rich.ipac.bus.TRACSAdminMenuRetrieveReportController	00000000	ALC	0.020
09/04/2001	11:05:56	org.frb.rich.ipac.bus.TRACSAdminMenuErrorDefaultALCController	00000000	ALC	0.070
09/04/2001	12:37:23	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.813
09/04/2001	12:53:13	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.823
09/04/2001	13:25:15	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.410
09/04/2001	13:25:51	org.frb.rich.ipac.bus.I_2_0_1_1_ALCPayrollOfficeEntryOKController	00000000	ALC	0.511
09/04/2001	13:45:02	org.frb.rich.ipac.bus.I_2_0_1_1_ALCPayrollOfficeEntrySelectAllALCsController	00000000	ALC	0.361
09/04/2001	16:17:12	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.823
09/04/2001	16:17:21	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.411
09/04/2001	16:17:51	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.813
09/04/2001	16:17:58	org.frb.rich.ipac.bus.TRACSAdminMenuALCInformationUpdateController	00000000	ALC	0.040
09/05/2001	8:31:06	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.813
09/05/2001	8:31:16	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.411
09/05/2001	8:31:40	org.frb.rich.ipac.bus.I_2_0_1_1_ALCPayrollOfficeEntrySelectAllALCsController	00000000	ALC	0.401
09/05/2001	8:42:60	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.812
09/05/2001	8:44:45	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.410
09/05/2001	10:31:50	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.813
09/05/2001	10:32:07	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.420
09/05/2001	10:32:26	org.frb.rich.ipac.bus.I_2_0_1_1_ALCPayrollOfficeEntrySelectAllALCsController	00000000	ALC	
09/05/2001	10:36:28	org.frb.rich.ipac.bus.GOALSMenuTRACSAdminController	00000000	ALC	1.812
09/05/2001	10:36:44	org.frb.rich.ipac.bus.TRACSAdminMenuDataRetentionManagementController	00000000	ALC	0.410

Footer Comments

Figure I.7 Report Footer Comments

In addition to these two data entry fields, a Report Request screen may also contain additional fields that allow you to enter restrictive criteria for report data retrieval. Since these fields will vary by report, they will be discussed under Menu Option 10 with each individual report.

Function Buttons

There are 4 standard function buttons on Enrollment application **Report Request** screens:

“Select Specific User”

Accepts the information entered on the **Report Request** screen as the report description and report footer and displays the **Find User** screen shown in Figure I.4 and discussed above.

“Clear”

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

“Return to Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without saving any information entered.

“Help”

Displays system help information for this screen.

Report Statistics

Selecting “Find by Login ID” from the **Find User** screen or “Select” from the **Select User** screen will display the **Report Statistics** screen shown in Figure I.7. This screen displays the number of pages the report or document will have and provides you with a drop-down menu option of output formats.

Report Statistics

OK Return To Enrollment Main Menu Help

Number of pages in report: 1

Output Format: HTML PDF

OK Return To Enrollment Main Menu Help

Figure I.8 Report Statistics

Report Output Menu Options

HTML (HyperText Markup Language)

The document format used on the World Wide Web. Choose this option to view the report immediately. This is the default choice. The report is generated in HTML format and displays in the IPAC Report Viewer.

PDF (Portable Document Format)

A file format, read with Adobe Acrobat™ Reader, for saving the report to be viewed or printed on-line. The Acrobat reader must be available to view or print the report.

Function Buttons

“OK”

Displays the report in the specified format.

“Return to Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without generating, saving or printing the report or document.

“Help”

Displays system help information for this screen.

Viewing HTML Format Documents and Reports

When a report is generated in HTML format for viewing on-line, the IPAC System Report Viewer is automatically called to display the report as shown in Figure I.9.

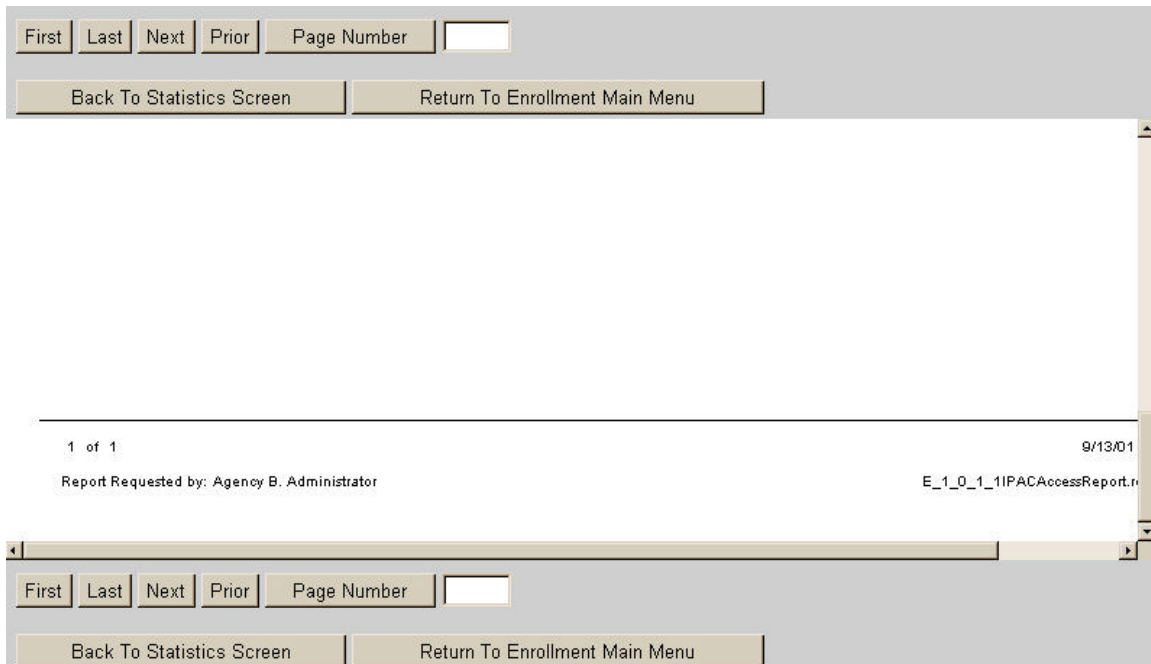


Figure I.9 Report Viewer

The Report Viewer will display the document or report one page at a time with as much of the page visible as your browser will allow. To see the rest of the page use the scroll bars. If you attempt to print this report through your browser, only the page currently being viewed will be printed.

Report Viewer Function Buttons

The Report Viewer also has standard function buttons, shown in Figure I.8, which appear at both the top and the bottom of the screen.

“First”

Moves you to the top of the first page (page 1) of the document.

“Last”

Moves you to the end of the last page of the document.

“Next”

Moves you to the next page in the document unless you are already on the last page.

“Prior”

Moves you back one page in the document unless you are already on the first page.

“Page Number”

Moves you to the page number entered in the Page Number field. If the field is left blank, clicking “Page Number” will move to the first page of the report. If the field is set to a page number greater than the number of pages in the report, clicking “Page Number” will move to the last page of the report. The presence of a page number in the field does not affect the operation of the “First”, “Last”, “Next” or “Prior” buttons.

“Back to Statistics Screen”

Returns you to the **Report Statistics** screen, discussed earlier in this section, where you can choose to display or print the report in another format.

“Return to Enrollment Main Menu”

Returns you to the **Enrollment Main Menu**. In a future release of IPAC, the report will be saved for later viewing through the Retrieve Report Function.

Viewing, Saving and Printing PDF Format Documents and Reports

If your system is equipped with Adobe Acrobat®, then a better choice for viewing or printing the report may be the PDF (**P**ortable **D**ocument **F**ormat) format. PDF, read with an Acrobat reader, allows documents to be displayed and printed in different operating systems while retaining its formatting properties and appearance. There are Acrobat readers available for DOS, Windows, UNIX and Mac platforms.

If you choose PDF as your file output format and see an error message similar to the one in Figure I.10, then either Acrobat is not installed on your system, or your browser is not configured to use it.

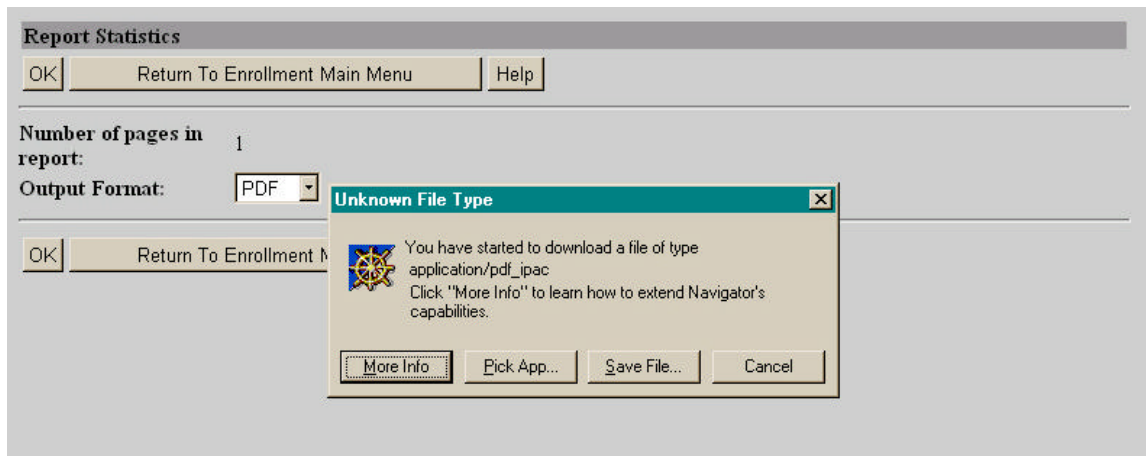


Figure I.10 Acrobat Error Message

If your browser is configured to use Acrobat, the next screen you see should be similar to Figure I.11. This is a warning that some files downloaded from the Internet can be dangerous. It also asks if you would like to open the file or save it to disk.

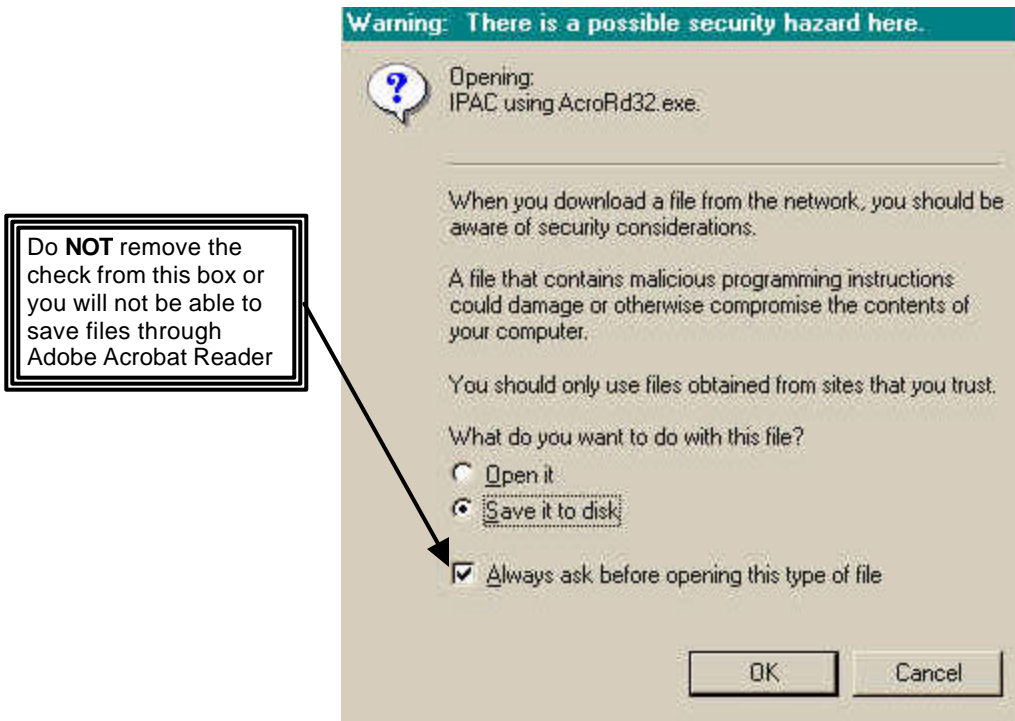


Figure I.11 File Download Warning

Since this report is coming from IPAC, a secure system, you can trust the source of the report. On this screen you must also decide if you want to open the report for viewing and printing, or if you want to save it to disk. Do NOT remove the check mark from the "Always ask before opening this type of file" box or you will not be able to save (or, conversely, view) files in PDF format.

If the check mark in the "Always ask..." box has been removed, this screen does not display and the report will be saved immediately ("Save As ..." dialog box will display), or displayed immediately in Acrobat. To correct this situation, see *Appendix D*.

Viewing and Printing a Report with Adobe Acrobat Reader

To **Open** the PDF file, Acrobat will automatically be opened to display it. Figure I.12 illustrates Acrobat's view of an IPAC Enrollment report.

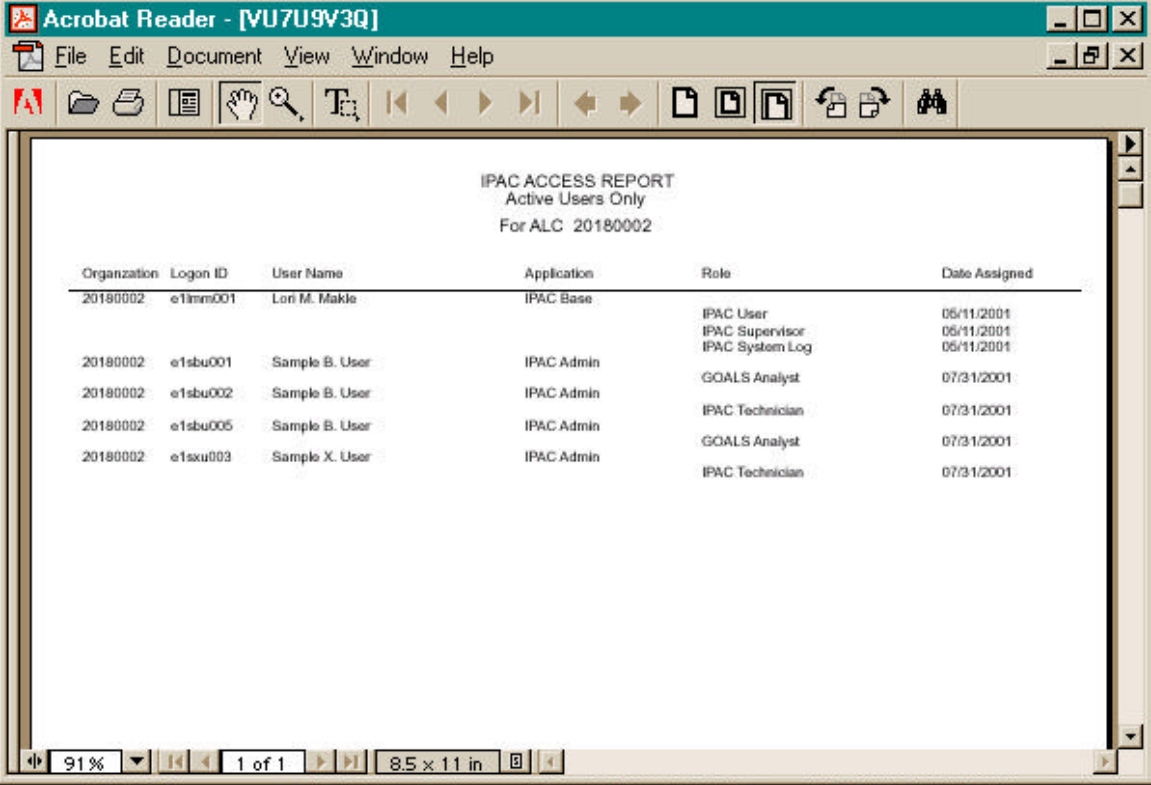


Figure I.12 Acrobat View of a Report

Acrobat is an easy program to use, and the buttons on its toolbar function as expected. For further assistance in the use of Acrobat, click **Help** while in the program, then **Reader Online Guide**, then **Viewing PDF Documents** for further information.

The report can also be printed from within the Acrobat Reader. Click the **File** option of the Acrobat menu bar to get the menu shown in Figure I.13.

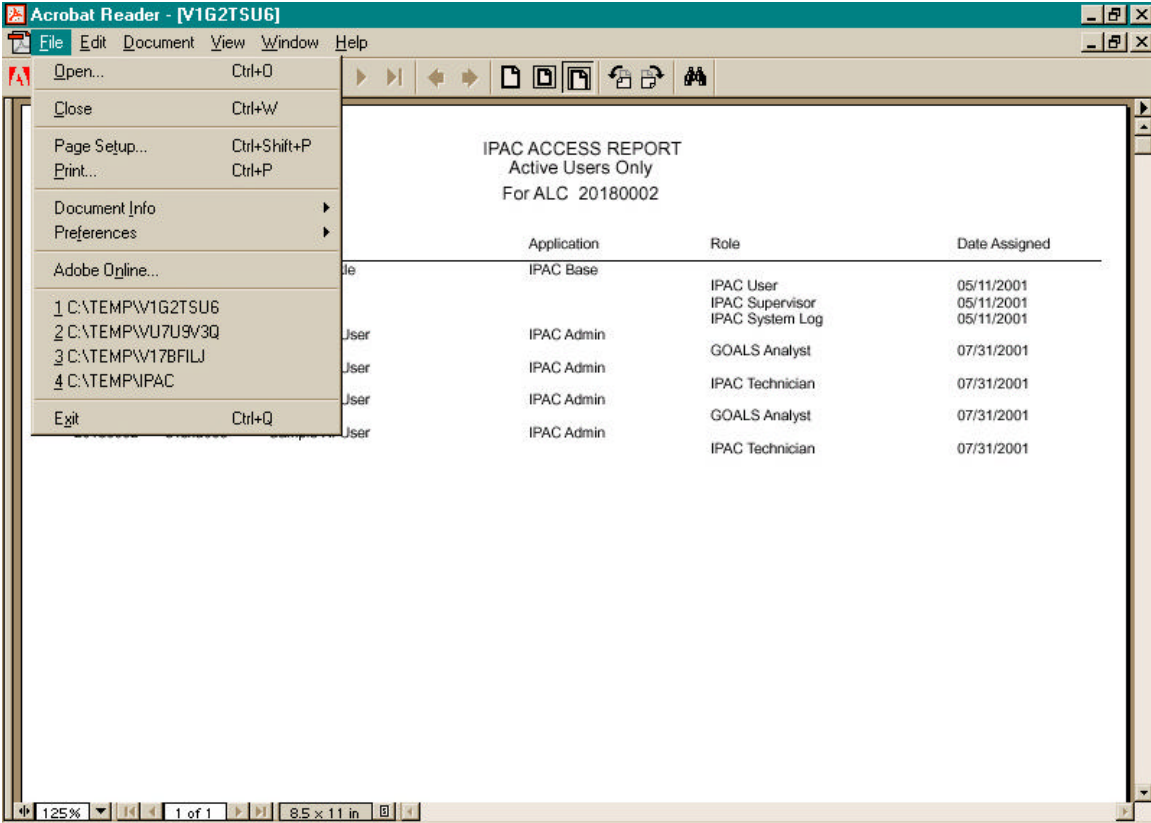


Figure I.13 Acrobat File Menu

Choosing the **Print** option from this menu will display the menu shown in Figure I.14

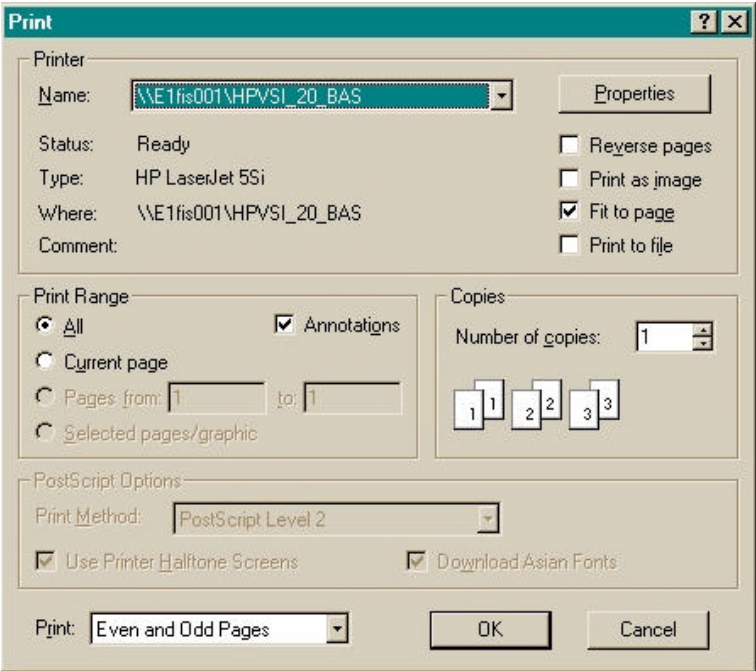


Figure I.14 Acrobat Print Menu

From here you can print the entire report, the current page of the report or a range of pages to your default printer. If you put a check in the “Print to File” box on this menu screen, the report will be saved to a file that can be interpreted by your printer, but will not be readily viewable by you. To save the file to a disk, choose the “Save it to disk” option on the previous menu. (See Figure I.11 in the *Introduction* and read below.)

Saving a Report with Acrobat

If you choose **Save it to disk** from the earlier menu shown in Figure I.11, you will see a standard Windows “Save As...” Dialogue Box (see Figure I.15). This allows you to name the output file, choose the location for the file and specify the type of file to save. The location and name you choose for the file will depend on your computer’s configuration and your agency’s procedures. Do NOT remove the check mark from the “Always ask before opening this type of file” box or you will not be able to save files through the Acrobat Reader. Once the file is saved, you will be returned to the **Report Statistics** screen where you can display the report in another format or return to the **Enrollment Main Menu**.

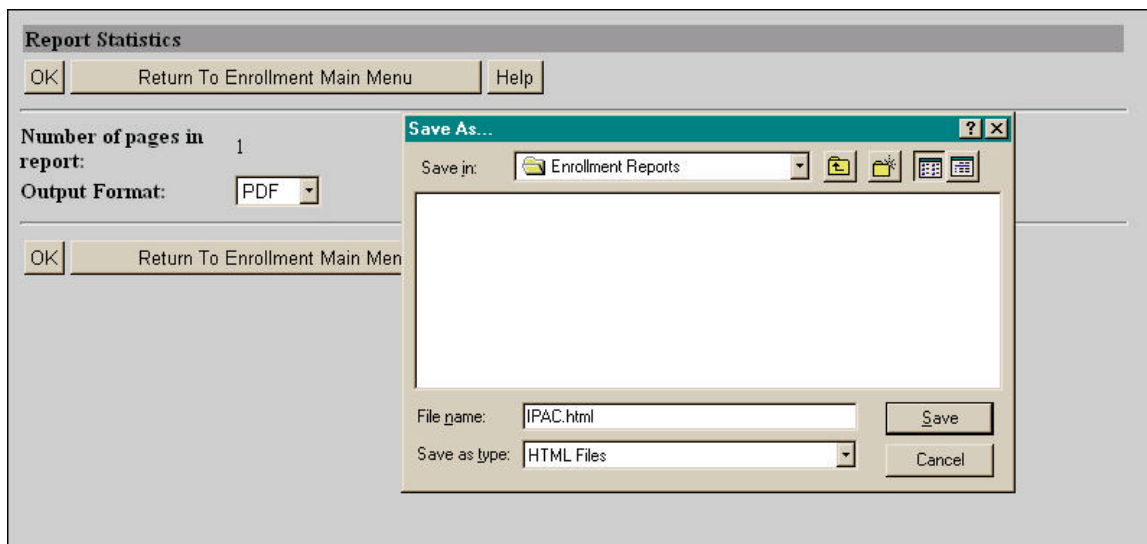


Figure I.15 Window “Save As...” Dialog box

Accessing the System

IPAC Enrollment is an Internet application that can be accessed using a secured web site address. The on-line version of the manual does not list the secured web site address. For more information contact the GOALS Customer Support Staff on (202) 874-8270.

Security Login

When you first enter the IPAC web address in your browser, you will be presented with a Login Screen similar to the one in Figure I.16. The actual appearance of this window may vary with the browser you are using to access the IPAC System, but the data entry boxes will remain the same. You must enter your User Name (Login ID) and Password to be allowed through the security layer and into the IPAC website.

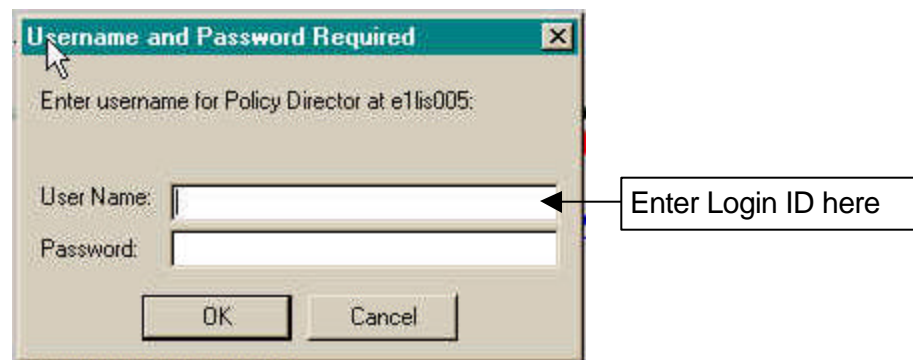


Figure I.16 Security Login Screen

When you are authorized as an administrator, you will be assigned a Login ID and a one-time-use password. Your Login ID will tell IPAC about your authorization to access various functions within the program. It will also tell IPAC the ALCs and/or Payroll Offices for whom you are authorized to do business. The first time you log onto the IPAC system you will be required to change your password. IPAC is a secure system and has specific requirements for passwords.

Passwords

Passwords must contain:

- A minimum of 8 characters
- At least 2 alphabetic characters
- At least 3 non-alphabetic (numeric and special) characters
- At least 5 unique (different) characters
- A maximum of 2 sequentially repeating characters

Passwords are case sensitive.

Passwords are aged and expire automatically every 30 days.

The user will receive warnings that the password is about to expire for the last 5 days of the password life.

Passwords will be disabled after 3 unsuccessful attempts.

Accounts must remain disabled for 30 minutes after being disabled for unsuccessful Login attempts.

The system will not let a user reuse any of the last 5 passwords.

The same password cannot be reused within 120 days.

“Must See” System Messages

Enrollment and its companion programs contain a facility for presenting messages to the entire system or to specified ALCs. The “Must See” messages are transmitted system wide to all users of the IPAC system, and may contain general instructions, training announcements, new reporting requirements or other administrative information. When you first go to the IPAC web site, if there is a current “Must See” message, you will be presented with a message screen similar to the one in Figure I.17 though the actual appearance of the message window will depend on the browser you are using. Once you have read and noted the message, you may close that window.

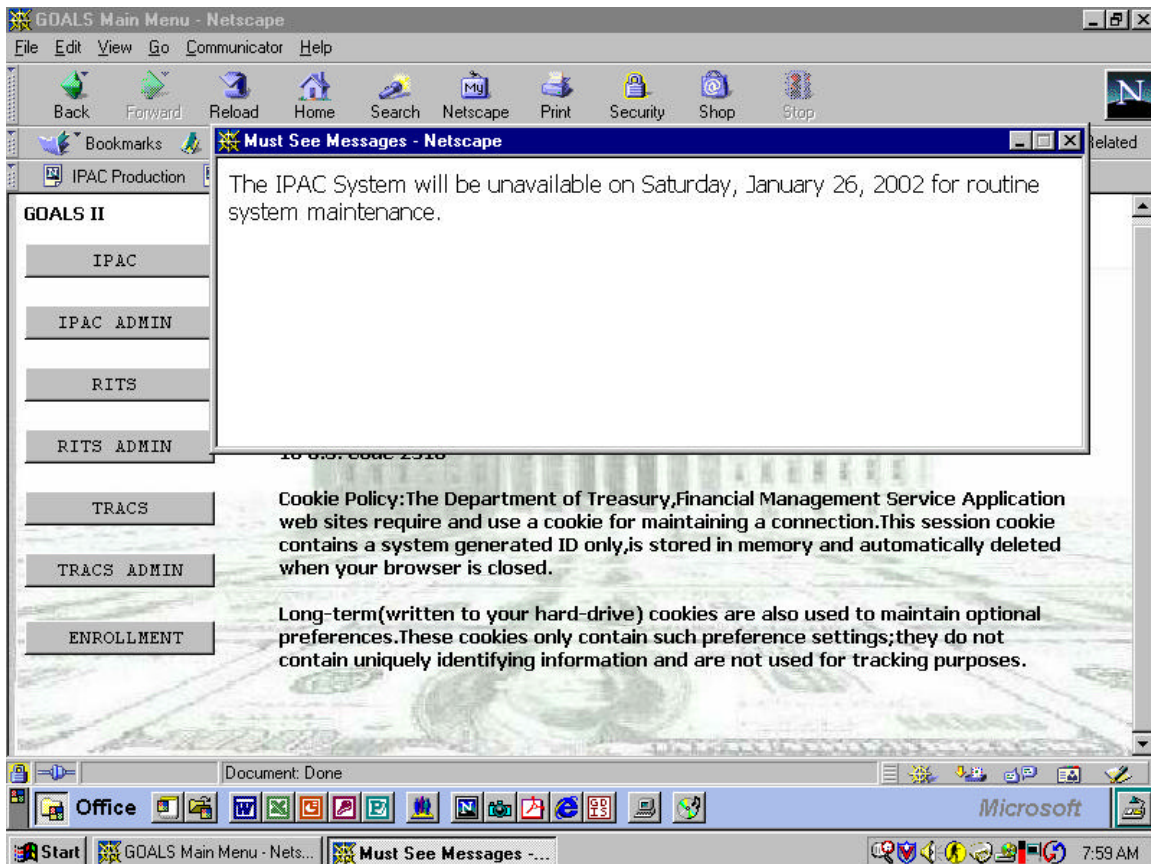


Figure I.17 System Messages

IPAC System Main Menu

Once you have completed the Login Screen and closed any system messages that appear, you will see the **IPAC System Main Menu** screen as shown in Figure I.18.

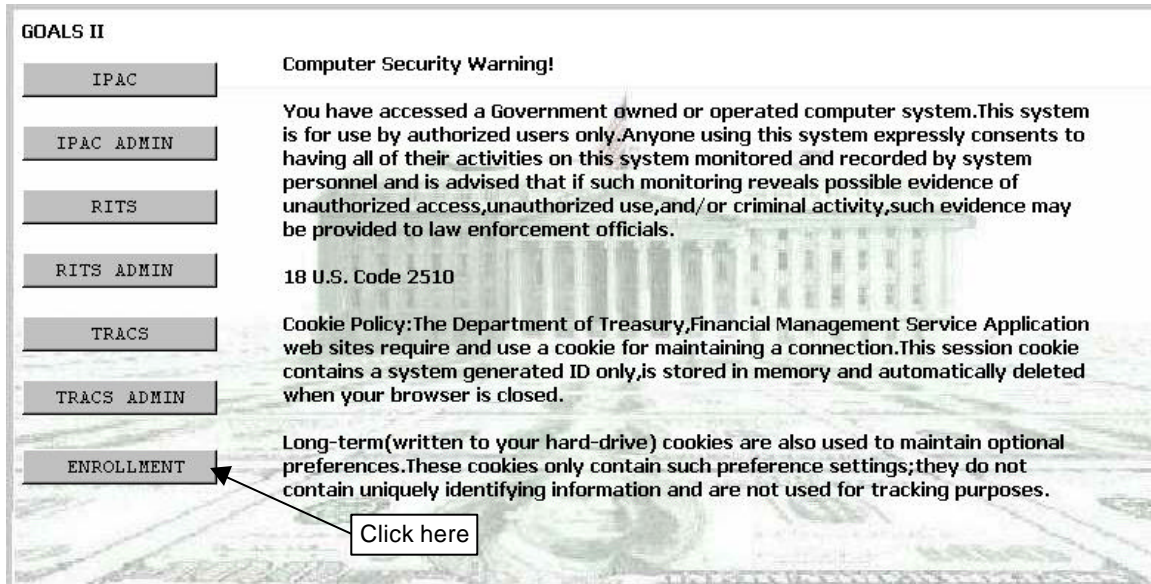


Figure I.18 IPAC System Main Menu

To enter the Enrollment module of the IPAC system, select the “Enrollment” button in the bottom left area of the screen. This will display a screen that is custom designed for the administrative role assigned to your Login ID.

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IPAC Agency Administrator

IPAC Agency Administrators are responsible for the creation and management of user accounts. They define users of the system for each IPAC Organizational Entity (ALC or Payroll Office) within the IPAC suite of applications. FMS grants Administration rights to the organization owning or managing the IPAC Organizational Entities.

To access the Enrollment application, log on to the IPAC system and choose the "ENROLLMENT" option from the **IPAC System Main Menu** as explained in the *Introduction* to this manual. The Main Menu for the Enrollment application will vary with the authority associated with your Login ID.

IPAC Agency Administrator Main Menu

The **Enrollment Main Menu** for the IPAC Agency Administrator is shown in Figure 1.1.

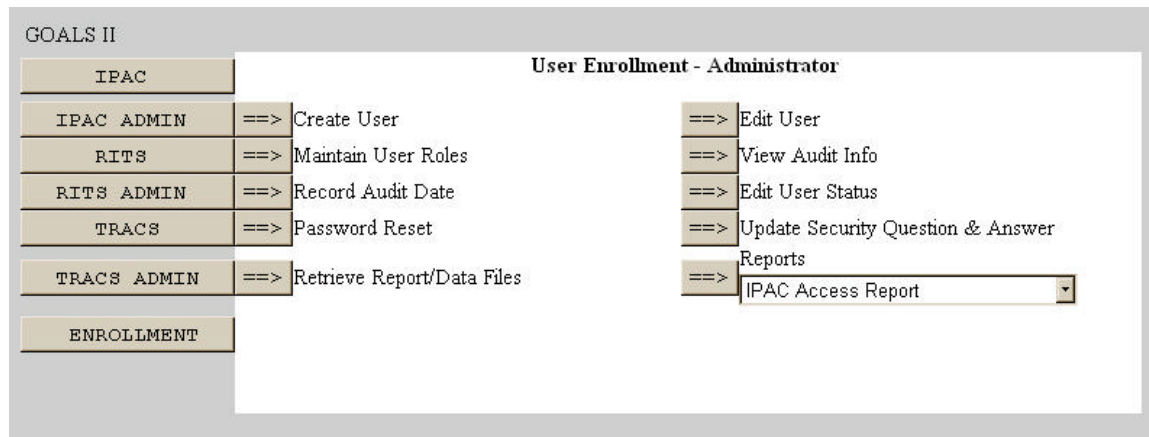


Figure 1.1 Enrollment Main Menu

Each function of this menu will be discussed separately in the following order:

- 1.1 Create User
- 1.2 Maintain User Roles
- 1.3 Record Audit Date
- 1.4 Password Reset
- 1.5 Retrieve Report/Data Files
- 1.6 Edit User
- 1.7 View Audit Info
- 1.8 Edit User Status
- 1.9 Update Security Question & Answer
- 1.10 Reports

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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.

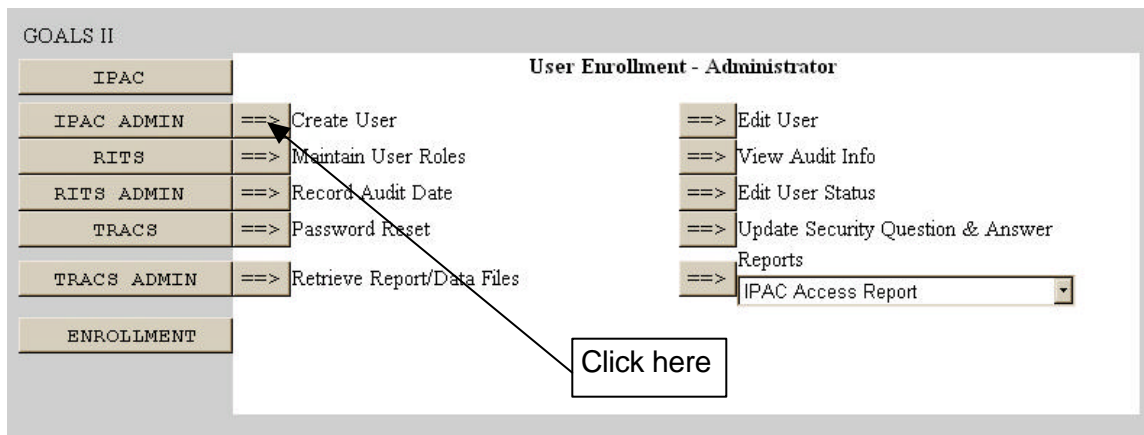


Figure 1.2 Enrollment Main Menu

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

Enrollment - Create/Edit User

OK Return To Enrollment Main Menu Clear Help

Name: First Name * Initial * Last Name *

Sample B User

Employer: Master ALC * Login ID

20180002

Contact Info: Email Address * Complete Work Phone *

Sample.user@ipac.gov (202) 874-0000

Mailing Address:

Agency Name * Street * Mail Stop: City * State * Zip Code * Country *

Sample Federal Agency 3700 East West Highway Hyattsville MD 20782 USA

OK Return To Enrollment Main Menu Clear Help

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.

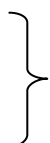
Street

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

The screenshot shows a software window titled "Enrollment - Select Application". At the top, there is a header bar with the title. Below the header, there are four buttons: "OK", "Return To Enrollment Main Menu", "Clear", and "Help". Underneath these buttons, the "User Name:" field is populated with "Sample B. User". Below the user name, there is a section titled "Available Applications:" which contains a drop-down menu. The menu is open, showing four options: "IPAC", "TRACS", "IPAC", and "RITS". The first "IPAC" option is currently selected and highlighted in blue. At the bottom of the window, there are four more buttons: "OK", "Return To Enrollment Main Menu", "Clear", and "Help".

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

The screenshot shows a window titled "Enrollment - Select Organization". At the top, there is a horizontal bar containing five buttons: "OK", "Select Another Application", "Return To Enrollment Main Menu", "Clear", and "Help". Below this bar, the "User Name" is displayed as "Sample B. User" and the "Application" is "IPAC". In the center, there is a label "ALC:" followed by a text input field containing the value "20180002". At the bottom of the window, there is another horizontal bar with the same five buttons as the top bar.

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

The screenshot shows a web application interface for changing user roles. The title bar reads "Enrollment - Change User Roles". The interface includes a top navigation bar with buttons for "Submit", "Add Role", "Select Another Organization", "Return To Enrollment Main Menu", and "Help". Below this, the current user's details are shown: "User Name: Sample B. User", "Organization: 20180002", and "Application: IPAC Admin". A table is present with a single column header "User Role" and a "Delete" button to its left. The bottom of the screen features another set of buttons: "Submit", "Add Role", "Select Another Organization", "Return To Enrollment Main Menu", and "Help".

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

The screenshot shows a window titled "Enrollment- Add Role". At the top, there are buttons for "OK", "Cancel", "Return To Enrollment Main Menu", "Clear", and "Help". Below these buttons, the user information is displayed: "User Name: Sample B. User", "Application: IPAC", and "Organization: 20180002". A horizontal line separates this from the "Available Roles:" section. In this section, there is a dropdown menu with a list of roles: "(IPAC) IPAC User", "(IPAC) IPAC Reports", "(IPAC) IPAC Supervisor", "(IPAC) Bulk File Submitter", "(IPAC) IPAC System Log", and "(IPAC) IPAC Bulk Automation". The first role, "(IPAC) IPAC User", is highlighted. Below the dropdown menu, there are buttons for "OK", "Cancel", "Return To Enrollment Main Menu", "Clear", and "Help".

Figure 1.7 Add Role

The data entry field on this screen, Available Roles;, 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 *Available Roles*: 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

Delete	User Role
No	GOALS Analyst

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.

User roles have been updated.

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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Option 2 Maintain User Roles

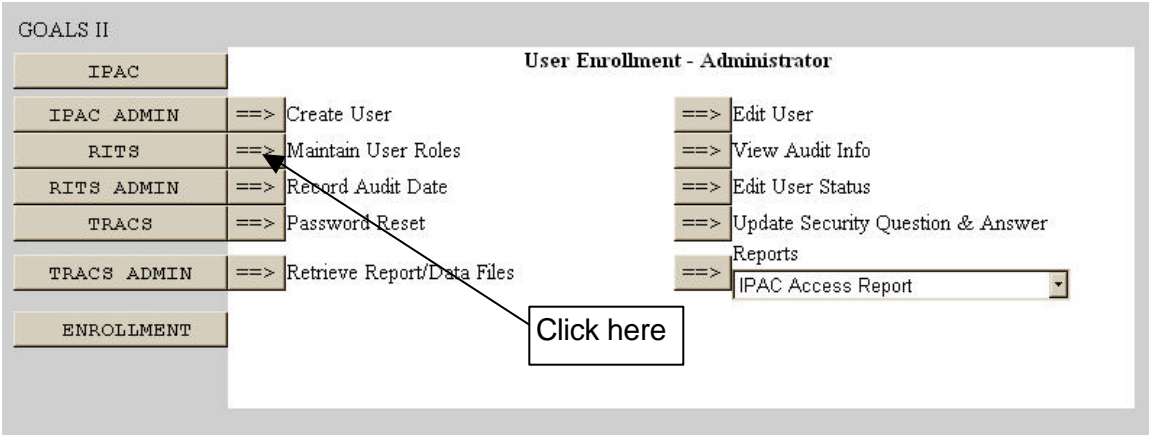


Figure 1.10 Enrollment Main Menu

The “Maintain User Roles” function provides the capability to manage user accounts by adding additional application roles to a user’s account or by deleting existing roles. Select “Maintain User Roles” as shown in Figure 1.10.

Retrieve the User’s Record

When you select “Maintain User Roles”, the **Find User** screen, shown in Figure 1.11, will display. This screen is used to retrieve the record of a user who is currently in the IPAC database. The process for retrieving a user’s record is explained in detail in the *Introduction* to this manual.

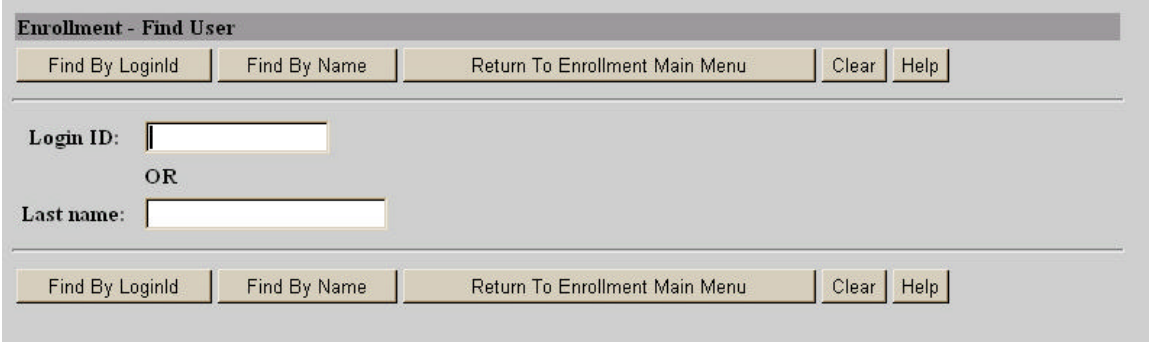


Figure 1.11 Find User

When you have retrieved the user’s record, the screen shown in Figure 1.12, **User Role Maintenance** will display.

Existing User Roles

Enrollment - User Role Maintenance

Delete Add Return To Enrollment Main Menu Clear Help

User Name: Sample B. User

Delete	Application	Org Type	Organization	User Role
No ▾	IPAC	A	20180002	IPAC User

Delete Add Return To Enrollment Main Menu Clear Help

Figure 1.12 User Role Maintenance

User authorizations are defined by a combination of the application, the Organizational Entity (ALC or Payroll Office), and the role. This screen lists the current authorizations available to the specified user in a table with the following columns:

Delete

Contains a drop down menu with choices of “Yes” to indicate requested deletion of the role or the default “No” to indicate that the role should not be deleted. This is the only data field on this screen that you can change.

Application

Indicates the application (IPAC, TRACS or RITS) to which the authorization applies.

Org Type

The type of organization to which the authorization applies. This field will contain “A” for ALC if the application is IPAC or TRACS. It will contain “P” for Payroll Office if the application is RITS.

Organization

Indicates the IPAC Organizational Entity (ALC or Payroll Office) to which the authorization applies.

User Role

Indicates the User Role to which the authorization applies. A complete list of the User Roles available for each application and the functions each role authorizes is available in *Appendix A*.

The **User Role Maintenance** screen has the following function buttons:

“Delete”

Use to delete an existing user role from the database as explained below.
Displays the **Delete Confirmation** screen shown in Figure 1.13 asking you to confirm the deletion of any user roles marked with a “Yes” in the Delete column.

“Add”

Displays the **Add Role** screen shown in Figure 1.7 and discussed earlier to allow you to add additional authorization roles for this user.

“Return To Enrollment Main Menu”

Returns you to the **Enrollment Main Menu** screen without saving any new roles or deletions you may have entered on this screen.

“Clear”

Returns the entries in the Delete column to their values the last time the screen was displayed.

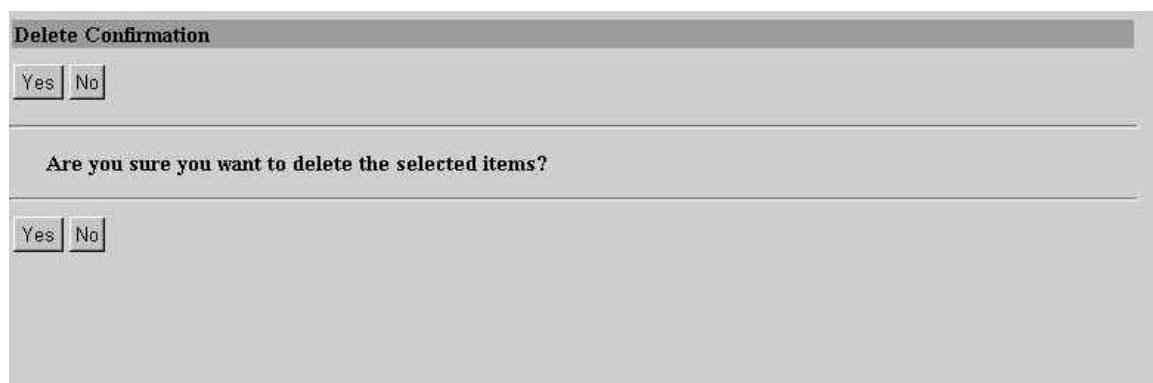
“Help”

Displays the system help for this screen.

Deleting User Roles

The **User Role Maintenance** screen allows you to add or delete roles for the specified user. To delete a listed role, find the row which contains the role you want to delete and select “Yes” from the drop down menu box in the Delete column of that row. You may mark none, one, or all of the listed roles for deletion. With the appropriate Delete field(s) marked “Yes”, select the “Delete” function button. The screen in Figure 1.13, **Delete Confirmation** will display.

Role Deletion Confirmation



Delete Confirmation

Yes No

Are you sure you want to delete the selected items?

Yes No

Figure 1.13 Delete confirmation

Select “Yes” to delete the marked role(s) or “No” to return to the previous screen without deleting the role. After either choice, the **Enrollment – User Role Maintenance** screen will display with the roles which are currently available to the user listed.

Adding User Roles

To add a new role for an existing user, select the “Add” button on the **User Role Maintenance** screen (Figure 1.12 and follow the instructions listed earlier in the *Create User* option to add additional application, organization, and role combinations for this user.

Click the “Return to Enrollment Main Menu” button for more menu options.

Option 3 Record Audit Date

The IPAC Agency Administrator's primary system responsibilities are the creation of user accounts and enforcement of the system security policy. The security policy enforcement includes the assignment and periodic (quarterly) review of user access to ensure that all granted authority is warranted and proper. The quarterly review should ensure all Login IDs have the proper user status and roles assigned to them. Please refer to *Option 8 Edit User Status* and *Appendix A* of this manual for further detail.

Use the "Record Audit Date" function to record the date you performed such an audit / review for an IPAC organizational entity (ALC or Payroll Office). Your audits will be reviewed by a Master Administrator with responsibility for IPAC System security.

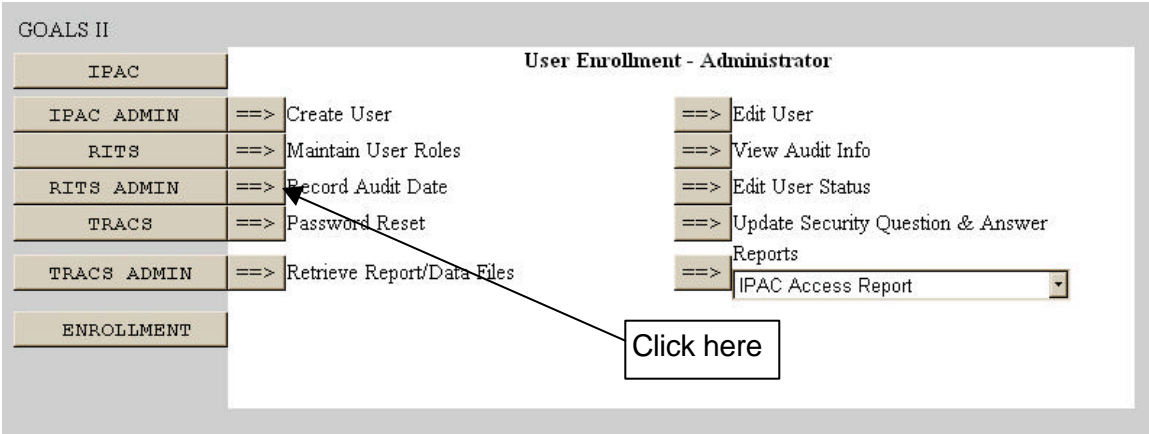


Figure 1.14 Enrollment Main Menu

Select the "Record Audit Date" button (as shown in Figure 1.14) to display the **Enter Audit Information** screen shown in Figure 1.15.

Enter Audit Information

The screenshot shows a web application window titled "Enrollment - Enter Audit Information". The window has a header bar with the title. Below the header bar, there are three buttons: "OK", "Return To Enrollment Main Menu", and "Help". The main content area contains two data entry fields: "Organization:" with a dropdown menu showing "(ALC) 20180002" and "Date of Audit:" with a text box containing "2001-09-18". At the bottom of the window, there are three more buttons: "OK", "Return To Enrollment Main Menu", and "Help".

Figure 1.15 Enter Audit Information

This screen allows you to record the date on which you most recently performed a security audit for a specific IPAC Organizational Entity. It has two data entry fields.

Organization

The first field on this screen is the Organization. This is the IPAC Organizational Entity (ALC or Payroll Office) for whom you are performing the audit. Your Login ID will determine the Organization(s) for which you are authorized to perform security audits

If you are only authorized to act on behalf of **one Organization**, that Organization will display in the Organization data entry box.

If you are authorized to do business for **multiple Organizations**, those Organizations will display in a drop-down list box for the Organization.

If you are authorized to do business for **more than 25 Organizations**, the Organization field will display as a blank data entry box.

The Organization field is required and you must accept the Organization shown as a default, choose an Organization from the drop-down menu or enter an Organization in this field.

Date of Audit

The Date of Audit is also a required field. Type in the date the audit was performed in "YYYY-MM-DD" format.

The function buttons available on this screen are:

"OK"

Records the audit information just entered in the IPAC database and displays the **Record Audit Date Confirmation** screen shown in Figure 1.16.

"Return To Enrollment Main Menu"

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

“Help”

Displays the system help for this screen.

Record Audit Date Confirmation

Entering an Organization and an audit date and selecting “OK” on the **Enter Audit Information** screen will save the audit information to the IPAC database and display the **Record Audit Date Confirmation** screen shown in Figure 1.16.

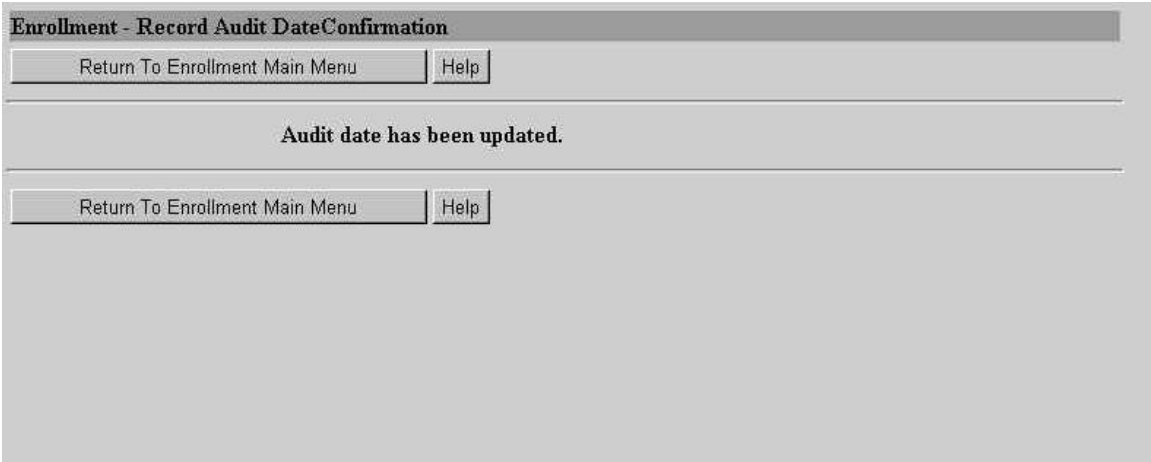


Figure 1.16 Record Audit Date Confirmation

Select “Return To Enrollment Main Menu” for more menu options.

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Option 4 Password Reset

The IPAC Agency Administrator is responsible for password maintenance on their user's accounts. New users are enrolled into the IPAC System using *Option 1 Create User* from the **Enrollment Main Menu**. After the User Roles Confirmation screen has been received, the user has been registered in the system and their system generated Login ID has been created. Then the user's initial password must be set using this menu option before the user can access the IPAC system. This menu option is also used by the IPAC Agency Administrator to perform password resets. Password resets may be needed in situations where the user has forgotten his password or the user has been locked out of the system after three unsuccessful attempts to enter his password.

All User Passwords stored for the IPAC system applications are first encrypted. When a new password is entered by a user, the application will audit the requested password to ensure that it meets security policy format requirements. If the password is cleared by the internal security audit, it is encrypted before it is stored to any permanent media.

All password exchanges are one way, from the user (or administrator) input into the IPAC system. There is no facility for the redisplay of a password by the system. The password collection function allows the appropriate user (or administrator) to enter a new password and then to retype the password for verification. On entry, the password characters are not displayed as typed. Rather, an asterisk (*) is displayed in the appropriate screen field for each character typed.

Since the passwords are encrypted, if a user password is forgotten, an Administrator cannot simply view the password and remind the user of its value. The Administrator must set the user's password to a temporary value that the user must then change on his next login.

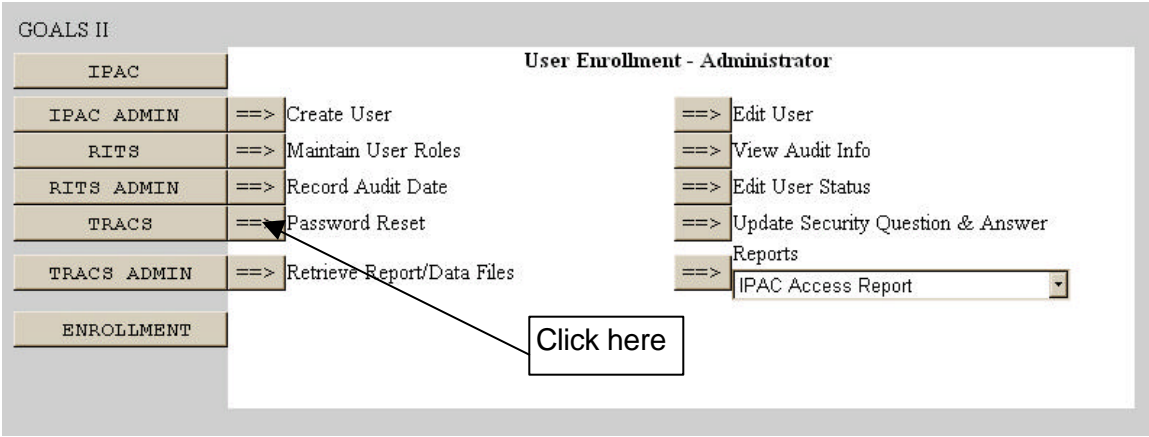


Figure 1.17 Enrollment Main Menu

To access the Password Reset function, select the “Password Reset” button from the **Enrollment Main Menu** as shown in Figure 1.17. The screen in Figure 1.18, **Find User** will display.

Retrieve the User’s Record

This screen is used to retrieve the record of a user who is currently in the IPAC database. The process for retrieving a user’s record is explained in detail in the *Introduction* to this manual.

Enrollment - Find User

Find By LoginId Find By Name Return To Enrollment Main Menu Clear Help

Login ID:

OR

Last name:

Find By LoginId Find By Name Return To Enrollment Main Menu Clear Help

Figure 1.18 Find User

When you have retrieved the user’s record, the screen shown in Figure 1.19, **Reset Password**, will display.

Reset Password

Enrollment - Reset Password

OK Return To Enrollment Main Menu Clear Help

User Name: Sample B. User

Password:

Re enter Password:

Security Question: Who was your first pet?

Security Answer: Slick Kitty

OK Return To Enrollment Main Menu Clear Help

Figure 1.19 Reset Password

Since most password reset requests will come to the administrator by telephone or email, the Administrator's **Reset Password** screen displays the Security Question and Security Answer previously entered for the Login ID. These are tools to verify the identity of the user for whom you are resetting a password. If a Security Question and Answer have been entered, the Administrator should ask the Security Question of the user and verify that the user's answer matches the Security Answer shown on the screen.

Once this verification has been made, the Administrator can enter a new password for the user and tell the user what his new password is. Administrator assigned passwords are only valid for one use. The user will be allowed to use the password to login to the system, but he must then immediately change his password to a new character string which meets the system requirements for a valid password.

Password Guidelines

The following is a list of guidelines to follow when setting up passwords:

- The maximum number of characters that can be repeated sequentially in a user password is 2. "123#depXX" could be set as a password because it does not exceed two "X" repeated characters. A password of "123#deXXX" could not be set as a password because three "X" characters exceed the limit of 2 repeated characters.
- The minimum number of letters of the alphabet that must be used for a password is 2.
- The minimum number of non-alphabetic characters (numbers, signs, special characters, etc.) that must be used for a password is 3.
- The minimum number of different characters that must be used for a password to be valid is 5. If the password specified is "0Abcbca0", the password would not be valid because it only contained four different characters (0, A, b, c).
- The minimum length for a password is 8 characters.
- IPAC system passwords are case sensitive.

Type the new password for the user in the data entry box labeled Password. On entry, the password characters are not displayed as typed. Rather, an asterisk (*) is displayed in the appropriate screen field for each character typed. Verify the password you have just entered by typing the same password in the Re enter Password data entry box.

The two character strings that you just typed will be compared to ensure that they are identical. If they match exactly, the password will be audited by IPAC system to verify

that it meets security format requirements. If both of these criteria are met, the screen shown in Figure 1.20, **Password Reset Confirmation**, will display.

Password Reset Confirmation

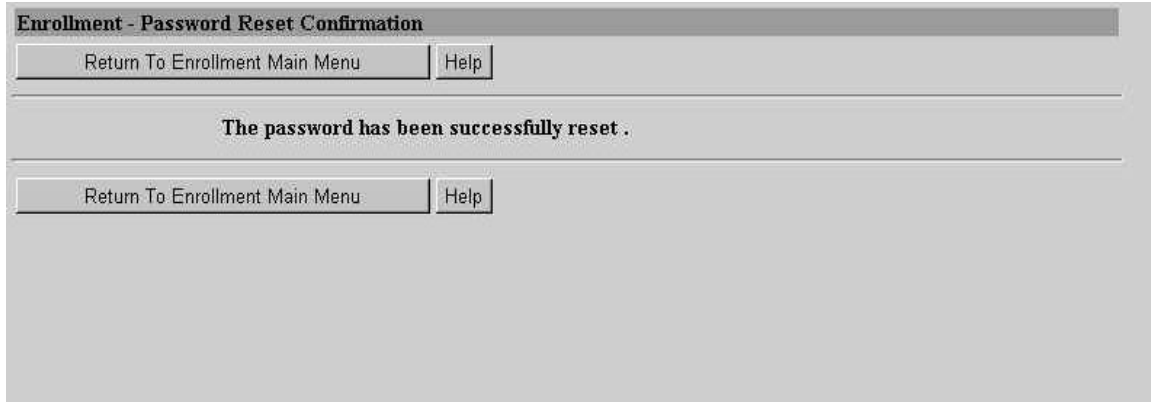


Figure 1.20 Password Reset Confirmation

This screen confirms that the password has been successfully reset and you can inform the user of his new, temporary password. Select "Return to Enrollment Main Menu" for more menu options.

After the Password Reset Confirmation screen has been received, the user's initial password has been established. Then the user must be informed of his Login ID and Password so that he can access the IPAC System. The IPAC Letter Report will generate a separate User ID and Password letter for each user. See *Option 10 Reports* from the **Enrollment Main Menu** for instructions on how to generate the Login ID and Password letters for each user that you have registered.

Option 5 Retrieve Report/Data Files

The functionality of this button is not available in the first release of the IPAC Enrollment application.

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Option 6 Edit 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. You must enter the individual's name, employing agency and contact information to establish the user in the database. This function is used to update that user information initially entered through the "Create User" function (see *Option 1* of this manual).

To edit user information in the IPAC system, select the "Edit User" button on the **Enrollment Main Menu** as shown in Figure 1.21.

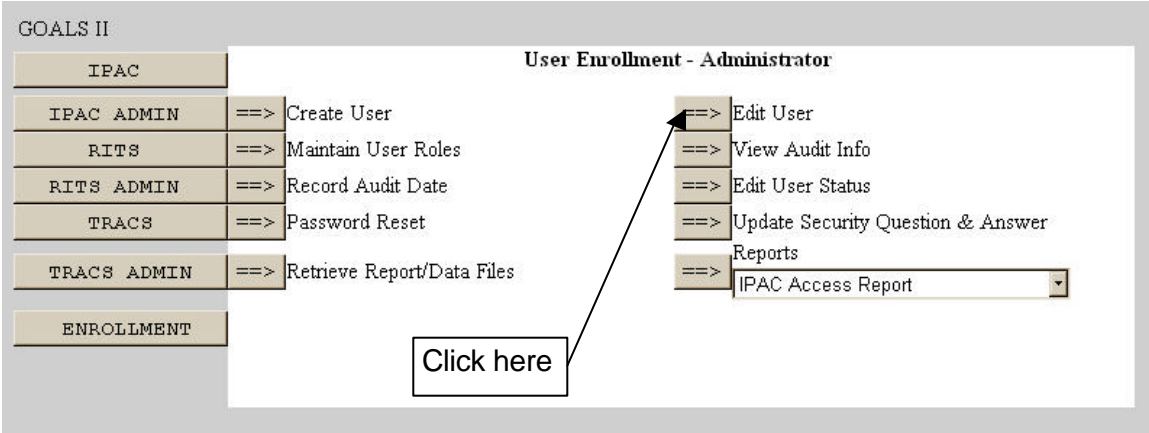


Figure 1.21 Enrollment Main Menu

Retrieve the User's Record

When you select "Edit User", the **Find User** screen, shown in Figure 1.22, will display. This screen is used to retrieve the record of a user who is currently in the IPAC database. The process for retrieving a user's record is explained in detail in the *Introduction* to this manual.

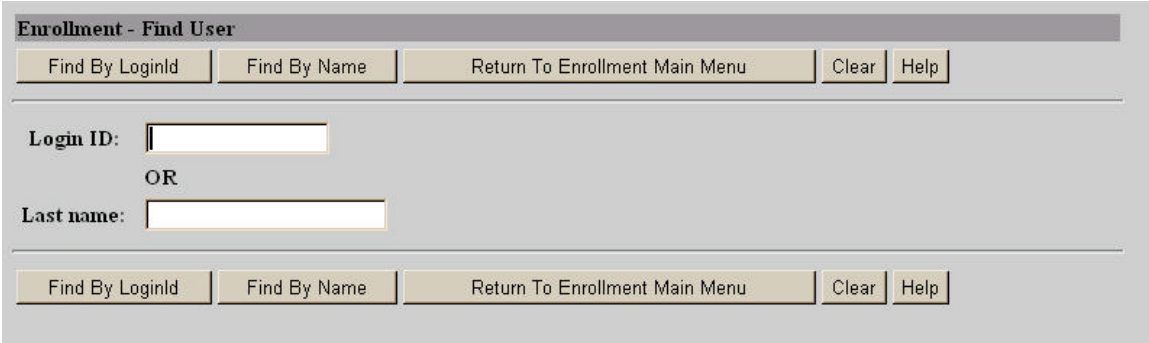


Figure 1.22 Find User

When you have retrieved the user's record, the screen shown in Figure 1.23, **Create/Edit User**, will display with the information currently in the system for the user loaded into the data entry fields.

Edit User Information

Enrollment - Create/Edit User

OK Return To Enrollment Main Menu Clear Help

Name: First Name * [Sample] Initial * [B] Last Name * [User]

Employer: Master ALC * [20180002] Login ID [e1sbu002]

Contact Info: Email Address * [Sample.user@ipac.gov] Complete Work Phone * [(202) 874-0000]

Mailing Address:

Agency Name: * [Sample Federal Agency]

Street: * [3700 East West Highway]

Mail Stop: []

City: * [Hyattsville] State: * [MD]

Zip Code: * [20782] Country: * [USA]

OK Return To Enrollment Main Menu Clear Help

Figure 1.23 Create/Edit User

The data entry fields on this screen are explained in detail in *Option 1, Create User*. You may change any of the user's information except his system Login ID from this screen.

User authorizations are edited through the "Maintain User Roles" function discussed in *Option 2*.

Select "Return to Enrollment Main Menu" to discard any changes you have made on this screen, or "OK" to accept the changes and store them to the database. The screen in Figure 1.24, **Enrollment User Information Confirmation** will display.

User Information Confirmation

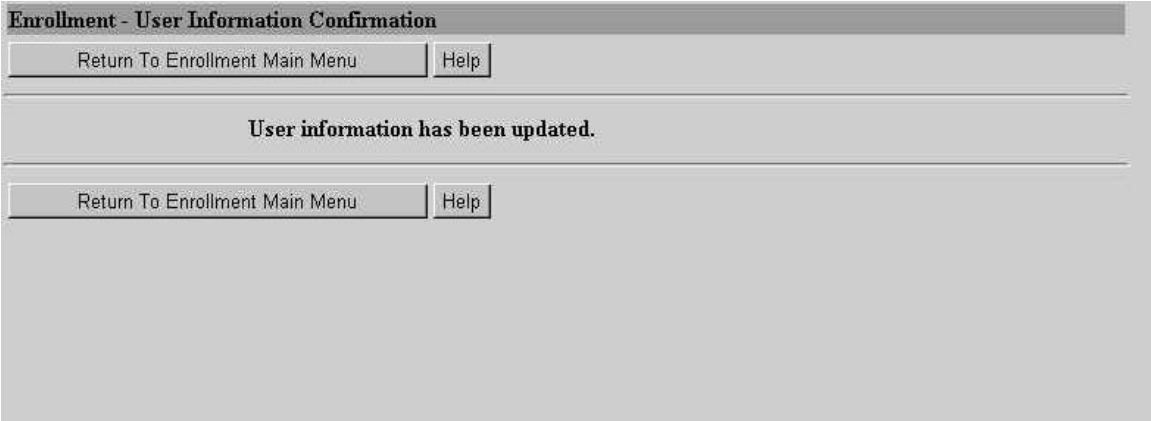


Figure 1.24 User Information Confirmation

This screen confirms that the user information has been updated. Select “Return To Enrollment Main Menu” for more menu options.

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Option 7 View Audit Info

The IPAC Agency Administrator's primary system responsibilities are the creation of user accounts and enforcement of the system security policy. The security policy enforcement includes the assignment and periodic (quarterly) review of user access to ensure that all granted authority is warranted and proper.

Use the "Record Audit Date" function to record the date you performed such an audit / review for an IPAC organizational entity (see *Option 3*). The "View Audit Info" function allows you to review the information you entered through the "Record Audit Date" function. To access this function, Select the "View Audit Info" function button from the **Enrollment Main Menu** as shown in Figure 1.25

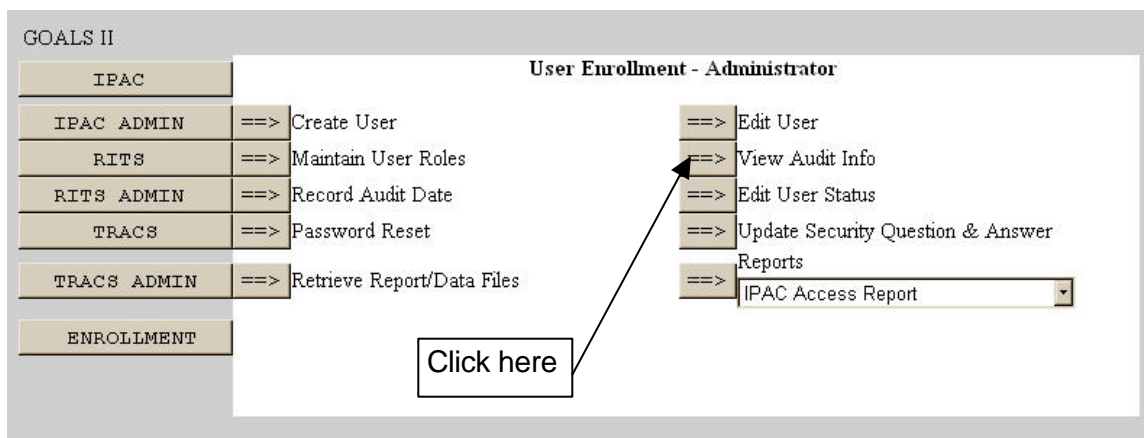


Figure 1.25 Enrollment Main Menu

This will display the **View Audit Information** screen, as shown in Figure 1.26.

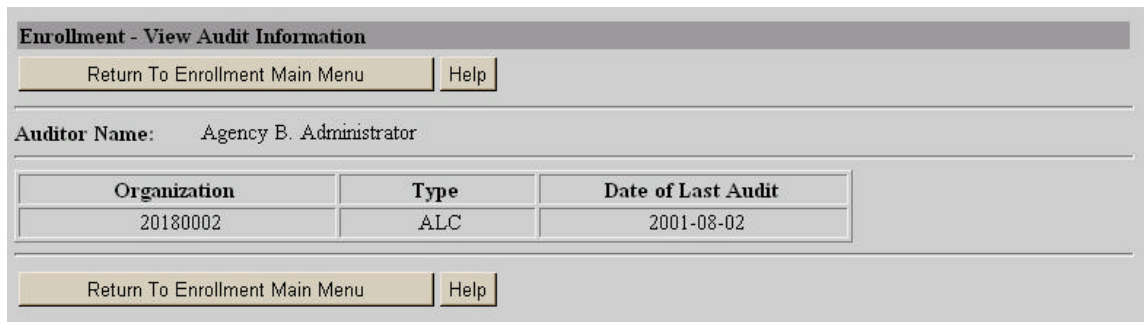


Figure 1.26 View Audit Information

This screen shows the organization, the organization type (ALC or Payroll Office) and the date of the most recent audit you entered for each IPAC Organizational Entity. Only the organizations the IPAC Agency Administrator has authority to enter work for will be displayed.

Select “Return To Enrollment Main Menu” button for more menu options.

Option 8 Edit User Status

There are three possible statuses for a registered user in the IPAC database: active, suspended and revoked. The normal user status is active and this status allows the user access to the authorizations he has been granted. When a user is first entered into the IPAC database, his status defaults to active. For security reasons, once a user has been entered in the IPAC database, an IPAC Agency Administrator cannot delete that user.

If a user will not be using the IPAC applications for an extended period of time, due to a vacation, leave of absence, temporary change in job duties or for some other reason, the user's authorizations should be suspended until he again needs access to the IPAC system.

If a user will no longer be granted access to the IPAC system, due to a change in employment or job duties, the user's authorization should be revoked. The practical effects of a suspended or revoked status are the same. When a user's status is suspended or revoked, he cannot access the IPAC system until his status has been changed to active by an Administrator with the proper authorization to make that change.

To make a change to a user's status, select the "Edit User Status" function button from the **Enrollment Main Menu** as shown in Figure 1.27.

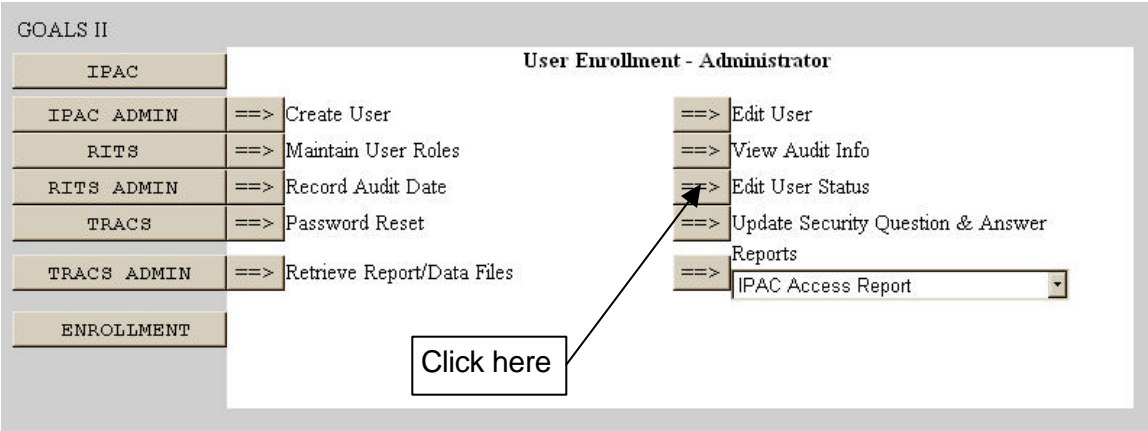


Figure 1.27 Enrollment Main Menu

Retrieve the User's Record

When you select "Edit User Status", the **Find User** screen, shown in Figure 1.28, will display. This screen is used to retrieve the record of a user who is currently in the IPAC database. The process for retrieving a user's record is explained in detail in the *Introduction* to this manual.

Figure 1.28 Find User

Edit User Status

When you have retrieved the user's record, the screen shown in Figure 1.29, **Edit User Status**, will display with the current user status in the Status: data entry field.

Figure 1.29 Edit User Status

The Status: data entry box contains a drop down menu that you may access by clicking on the down arrow to the right of the current status, as shown in Figure 1.30.

Active

The Active status should be used for all working Login IDs that have access to the applications.

Suspended

If a user will not be using the IPAC applications for an extended period of time, due to a vacation, leave of absence, temporary change in job duties or for some other reason, the user's authorizations should be Suspended until he again needs access to the IPAC system. The Login ID needs to be placed in an Active status when the employee returns to work. Suspending access for a Login ID reduces the risk of unauthorized entry into the applications through the use of this ID.

Revoked

The Revoked status needs to be assigned to Login IDs that will not be used any more. If an employee doesn't require access to the IPAC applications anymore, this status should be used. The Login ID may be placed back in an Active status if needed. Login IDs are not deleted from the system.

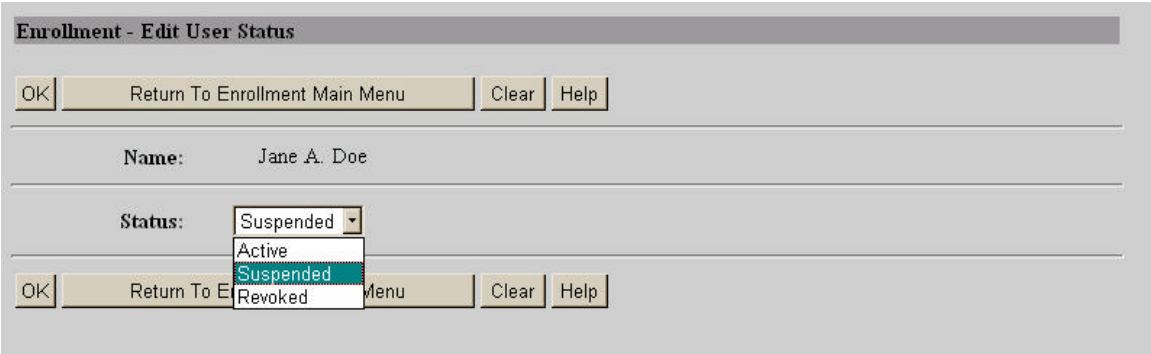


Figure 1.30 Edit User Status with Menu

Highlight a choice from the drop down menu to select a status. Select the "OK" function button to save the new user's status. The screen in Figure 1.31, **User Status Confirmation**, will display.

User Status Confirmation

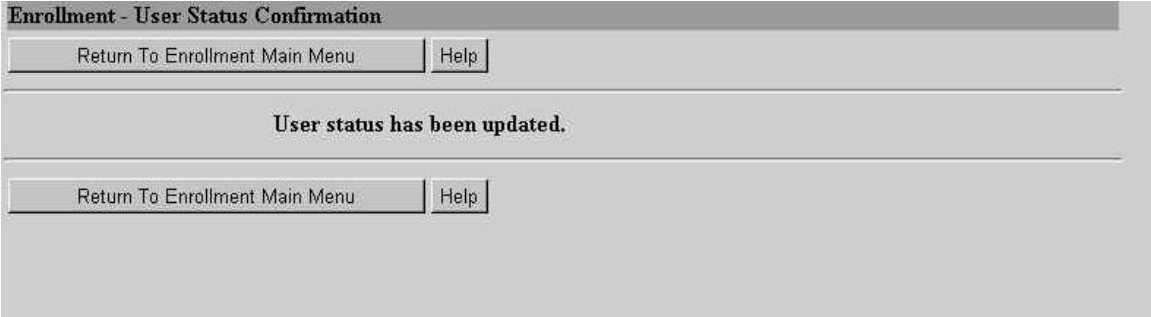


Figure 1.31 User Status Confirmation

This screen confirms that the user status has been updated. Select "Return to Enrollment Main Menu" for more menu options.

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Option 9 Update Security Question & Answer

The Security Question and Answer are included in the user profile information as an administrative aid for user identification and authentication. If a password must be reset by an administrator unfamiliar with the user making the reset request, the security question and appropriate response should be employed to verify the user's identity. Since this question and answer should involve something known by the user that is not common knowledge, the user himself is responsible for the initial entry and any ongoing changes to his own Security Question and Answer. This also applies to users who are IPAC Agency Administrators since they may need to verify their identity to a Master Administrator.

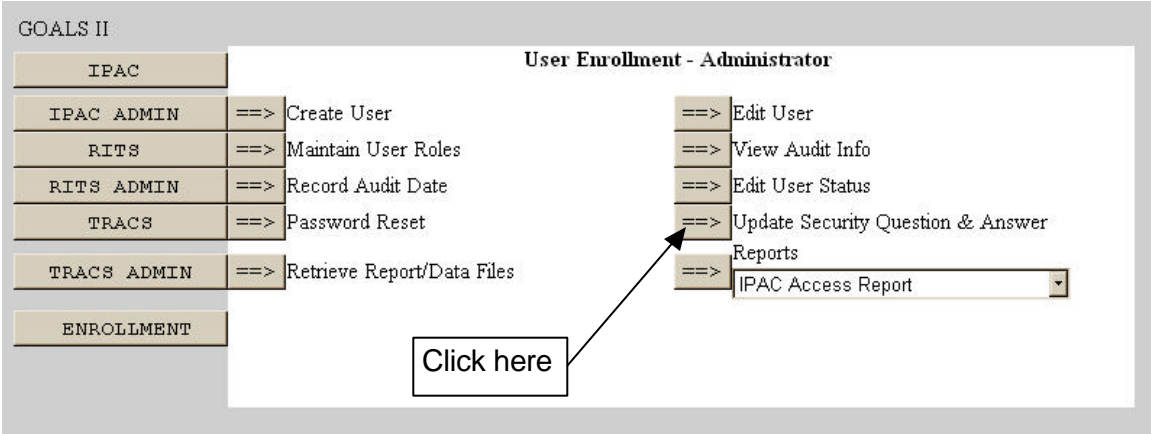


Figure 1.32 Enrollment Main Menu

Enter/Update Security Question and Answer

To initially enter, or to make a change to, your Security Question and Answer, select the "Update Security Question and Answer" function button from the **Enrollment Main Menu** as shown in Figure 1.32.

Security - Change Security Question

OK Return To Enrollment Main Menu Clear Help

User Name: Administrator, Regular G.

Question:

Answer:

OK Return To Enrollment Main Menu Clear Help

Figure 1.33 Change Security Question

If a question and answer are already in your personal profile, they will appear on this screen. You may enter a new question on this screen or revise the current question and answer. The question you enter should be about something that is not common knowledge and could not easily be inferred. (i.e. Who was my first grade teacher?) Tab to the "Answer" field and type in the answer. Select "OK" to accept. The screen in Figure 1.34, **Security Question/Answer Changed Confirmation** will display.

Security Question/Answer Changed Confirmation

Security Question/Answer Changed Confirmation

Return To Enrollment Main Menu Help

The security question and answer have been successfully changed .

Return To Enrollment Main Menu Help

Figure 1.34 Security Question/Answer Changed Confirmation

This screen confirms that the security question and answer have been changed. Select "Return To Enrollment Main Menu" for more menu options.

Option 10 Reports

Report generation and printing for the Enrollment application is centralized in this function.

Viewing and Printing Reports

The viewing and printing of documents from Enrollment is standardized and is discussed in the *Introduction*. In many instances, reports have parameters that allow you to place constraints on the data retrieved into the report. The parameters, or report criteria, limit the boundaries of the data that will be contained in the report. For instance, you may be asked for a Start and End Date for the report and only data within this range will be retrieved. These and other parameters are entered through a **Report Request** screen after the report is selected from the menu and before generation of the report is requested and discussed with the individual reports to which they apply.

Report Request Which Produces No Data

When a report request does not produce any data, no report is generated and the **Report Statistics** screen will show the report having 0 pages. Figure 1.35 is an example of this situation.



Figure 1.35 Report Request Which Produced No Data

When this happens, there is no "OK" button to request display of the report. Your only options are to return to the **Enrollment Main Menu** or to view the system help screen.

Accessing the Reports Function

To access the Reports function, log on to the IPAC System and choose the Enrollment option from the **IPAC System Main Menu** as explained in the *Introduction*. The **Enrollment Main Menu** is shown in Figure 1.36.

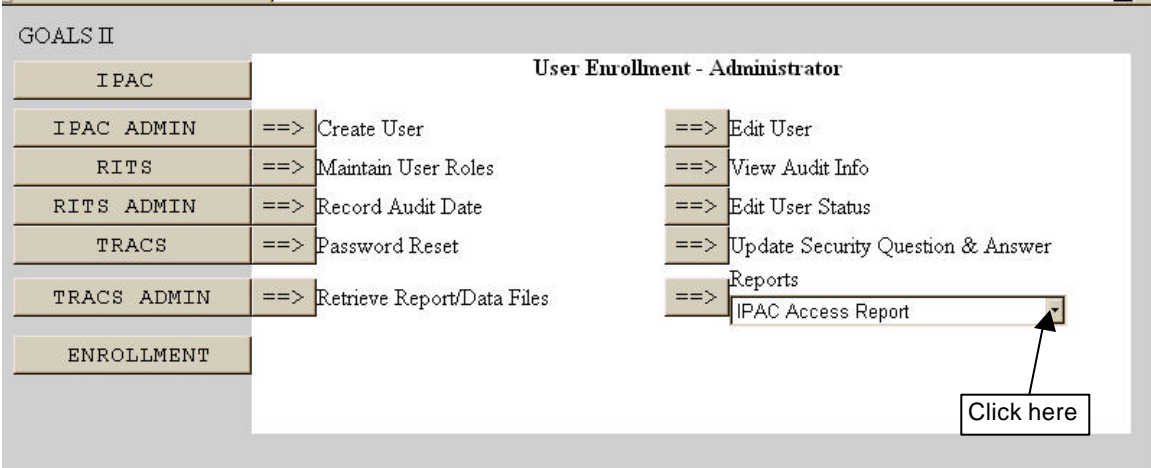


Figure 1.36 Enrollment Main Menu

The Reports function has a drop-down menu that allows you to select a report before entering the function. You can display this menu by clicking on the down arrow to the right of the default report name.

All of the Enrollment reports will be discussed in this section, but the reports that appear on your menu will vary according to the authorization associated with your Login ID. Figure 1.37 shows the **Enrollment Main Menu** with the report menu displayed.

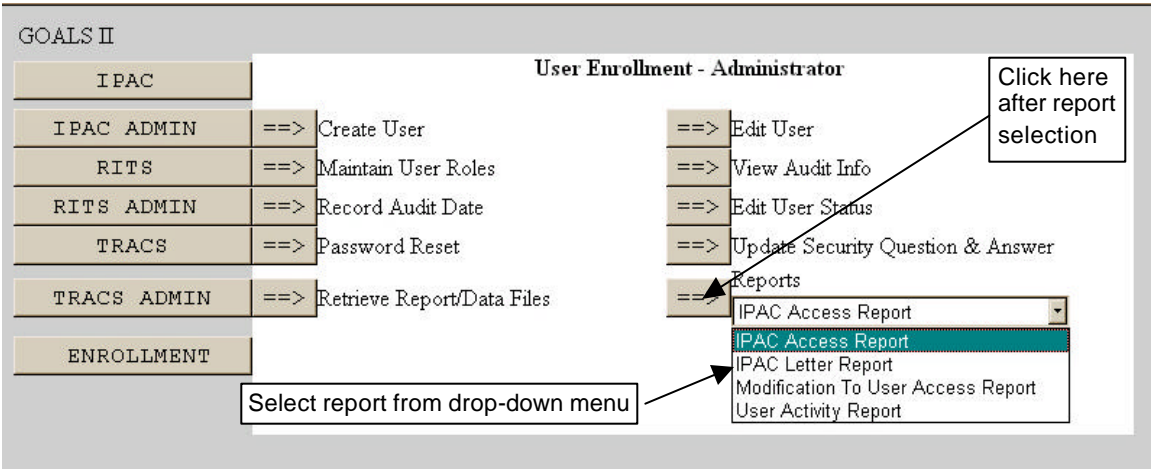


Figure 1.37 Enrollment Main Menu with Reports Menu

IPAC Access Report

This report reflects the access that has been made to the IPAC system by an IPAC organization (ALC or Payroll Office) or by a specific user.

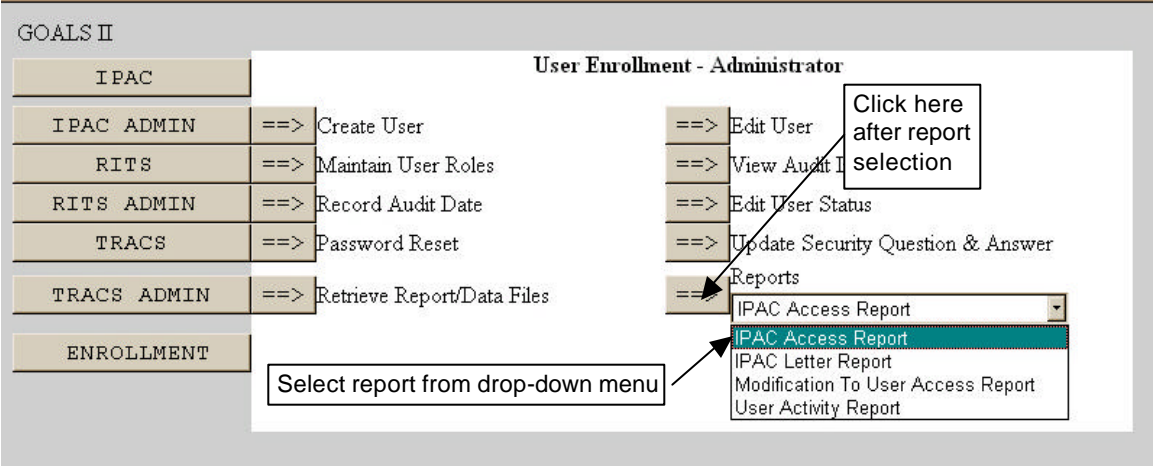


Figure 1.38 IPAC Access Report Menu Selection

To run this report, select and highlight "IPAC Access Report" from the drop down menu by the "Reports" function button, then select the "Reports" button. The **IPAC Access Report Request** screen, shown in Figure 1.39, will display.

IPAC Access Report Request Screen

IPAC Access Report

OK Select Specific User Clear Return To Enrollment Main Menu
Help

Report File Description: [Text Box]

Organizations

All
 ALC [Text Box]
 Payroll Office [Text Box]

User Status

Active Users
 Suspended Users
 Revoked Users

Footer Comments: [Text Box]

OK Select Specific User Clear Return To Enrollment Main Menu
Help

Figure 1.39 IPAC Access Report Request

IPAC Access Report Request data entry fields:

Report File Description

This field is discussed in the *Introduction* under *Viewing and Printing Reports*. This field is not required, but its use is strongly recommended.

Organizations

You **must** mark one of the option buttons under this category. To obtain a report on IPAC access for all IPAC Organizations, select the ALL option button. For a report on access for a single IPAC Organization, select the ALC option button and enter an ALC in the data entry box next to that button **or** select the Payroll Office option button and enter a Payroll Office Number in the data entry box next to that button. These option buttons are mutually exclusive, and selecting one of these buttons will deselect any previously selected button in this category.

User Status

You do **NOT** need to select an option button from this category. To show IPAC access from one of these user status categories, select the option button

labeled Active Users, Suspended Users or Revoked Users. To show IPAC access from all user status categories, do not select any of the option buttons.

Footer Comments

This field is discussed in the *Introduction* under *Viewing and Printing Reports*. The field is not required.

IPAC Access Report Request function buttons:

“OK”

This button accepts the Report File Description and Footer Comments and any restrictive criteria you have entered on the **Report Request Screen** and generates the report data for all users (as restricted by the User Status options and your Login ID authority), then displays the **Report Statistics Screen**.

“Select Specific User”

Accepts the information entered on the **Report Request** screen as the report description and report footer and displays the **Find User** screen shown in Figure 1.4 in the *Introduction* under *Viewing and Printing Reports*.

“Clear”

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

“Return to Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without saving any information entered and without generating the report.

“Help”

Displays system help information for this screen.

A sample of the IPAC Access Report is shown in Figure 1.40.

IPAC ACCESS REPORT
Active Users Only
For ALC 20180002

Organization	Logon ID	User Name	Application	Role	Date Assigned
20180002	e1lmm001	Lori M. Makle	IPAC Base	IPAC User IPAC Supervisor IPAC System Log	05/11/2001 05/11/2001 05/11/2001
20180002	e1sbu001	Sample B. User	IPAC Admin	GOALS Analyst	07/31/2001
20180002	e1sbu002	Sample B. User	IPAC Admin	IPAC Technician	07/31/2001
20180002	e1sbu005	Sample B. User	IPAC Admin	GOALS Analyst	07/31/2001
20180002	e1sxu003	Sample X. User	IPAC Admin	IPAC Technician	07/31/2001

Figure 1.40 Sample IPAC Access Report

IPAC Letter Report

When an IPAC Agency Administrator creates a new user (see *Option 1*) and sets the initial password (see *Option 4*), this option is accessed to print two form letters. One tells a newly registered user that he has been granted IPAC authority and informs him of his Login ID. The second letter (to be provided to the user under separate cover) tells the new user the initial password that he has been assigned.

The second letter is a form letter that contains a blank line for the password. Once the user's initial password has been set (see *Option 4*), and this letter is generated, the IPAC Agency Administrator must clearly document the initial password on the blank line provided in the letter. **Note:** Passwords are case sensitive, so be careful to write the password exactly as it was entered into the system.

Then the IPAC Agency Administrator must distribute both of these letters to the user. If the letters cannot be personally delivered by the IPAC Agency Administrator, then the letters should be mailed separately to the user. For security reasons, the Login ID and Password letters should not be mailed in the same envelope.

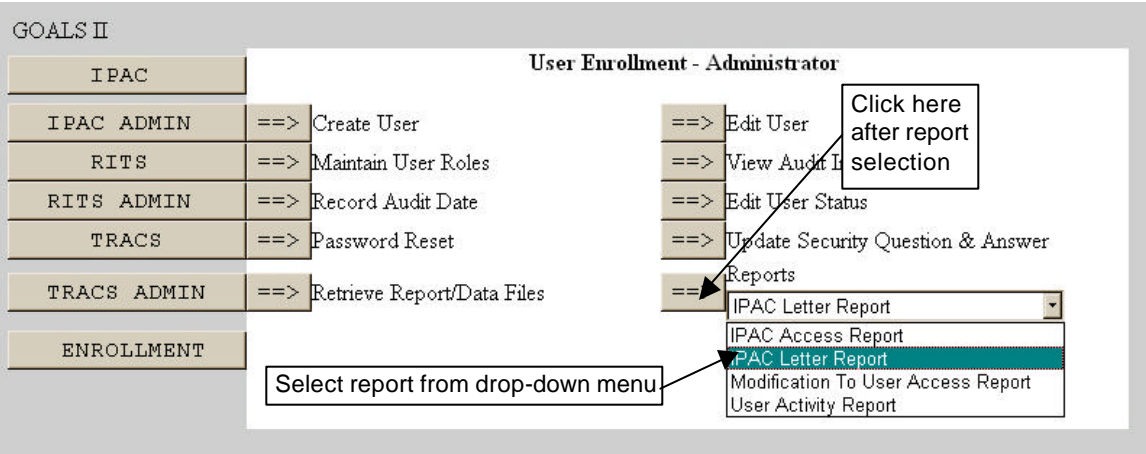


Figure 1.41 IPAC Letter Report Menu Selection

To run this report, select and highlight "IPAC Letter Report" from the drop down menu by the "Reports" function button, then select the "Reports" button. The **IPAC Letter Report Request** screen, shown in Figure 1.42, will display.

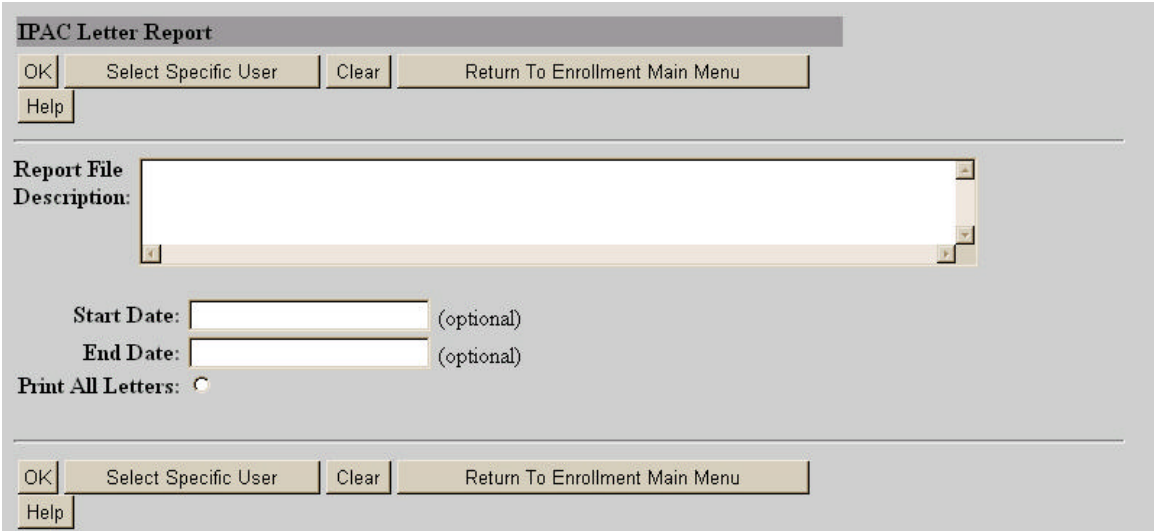


Figure 1.42 IPAC Letter Report Request screen

IPAC Letter Report Request data entry fields:

Report File Description

This field is discussed in the *Introduction* under *Viewing and Printing Reports*. This field is not required, but its use is strongly recommended.

Start Date

End Date

Enter the dates for which you want to generate IPAC Letter Reports. Dates must be entered in YYYY-MM-DD format. New users created before the Start Date or after the End Date will not have letters generated. These dates are optional. If no dates are entered, the Print All Letters option button should be selected.

Print All Letters

This option button should must be chosen if the Start Date and End Dates are not be specified. If neither the start and end dates nor this option are specified, the report will not contain any data.

IPAC Letter Report Request function buttons:

“OK”

This button accepts the Report File Description and Start and End dates (if those are specified) and generates the data for the IPAC Letter report (as restricted by the date options and your Login ID authority), then displays the **Report Statistics Screen** discussed in the *Introduction*.

“Select Specific User”

Accepts the information entered on the **Report Request** screen as the report description and report footer and displays the **Find User** screen shown in Figure 1.4 in the *Introduction* under *Viewing and Printing Reports*.

“Clear”

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

“Return to Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without saving any information entered and without generating the report.

“Help”

Displays system help information for this screen.

A sample of the IPAC Letter Report for a specific user is shown in Figures 1.43 and 1.44.

CONFIDENTIAL

Date: Thursday, September 13, 2001
To: Jane A. Doe
3700 East West Highway
Hyattsville, MD 20782

Your request for access to the IPAC System has been successfully processed. You have been granted access to the IPAC System as follows:

Organization*	Application	Role
20180002	IPAC	IPAC Supervisor
20180002	TRACS	TRACS Reports
20180002	TRACS	Bulk File User

Your Login ID is: e1jad002 Your initial password for this ID will be provided under separate cover.

Please use your access to the IPAC system in a responsible manner and only to accomplish legitimate IPAC business. Do not disclose your ID or Password to other people or knowingly or carelessly make it possible for other people to access the IPAC system using your Login ID and Password. You are responsible for all actions that are taken under your Login ID.

If you do not receive your password within 5 workdays, please contact your IPAC Agency Administrator or the GOALS Customer Support Staff on (202) 874-8270.

*Organization is defined as an ALC for the IPAC and TRACS applications or a Payroll Office for the RITS application.

Figure 1.43 IPAC Letter Report (page 1) – Login ID Letter

CONFIDENTIAL

Date: Thursday, September 13, 2001
To: Jane A. Doe
3700 East West Highway
Hyattsville, MD 20782

Your request for access to the IPAC System has been successfully processed. Your initial password is _____. Your Login ID will be provided under separate cover.

This password is a single one-time use password. Immediately upon it's use, you will be prompted to establish a new password. Your password must contain:

1. A minimum of 8 characters.
2. At least 2 alphabetic characters.
3. At least 3 non-alphabetic (numeric or special) characters
4. At least 5 unique (different) characters
5. A maximum of 2 sequentially repeating characters

Please use your access to the IPAC system in a responsible manner and only to accomplish legitimate IPAC business. Do not disclose your ID or Password to other people or knowingly or carelessly make it possible for other people to access the IPAC system using your Login ID and Password. You are responsible for all actions that are taken under your Login ID.

If you do not receive your Login ID within 5 workdays, please contact your IPAC Agency Administrator or the GOALS Customer Support Staff on (202) 874-8270.

Figure 1.44 IPAC Letter Report (page 2) – Password Letter

Modification to User Access Report

This report reflects all administrative actions performed against a user's Login ID.

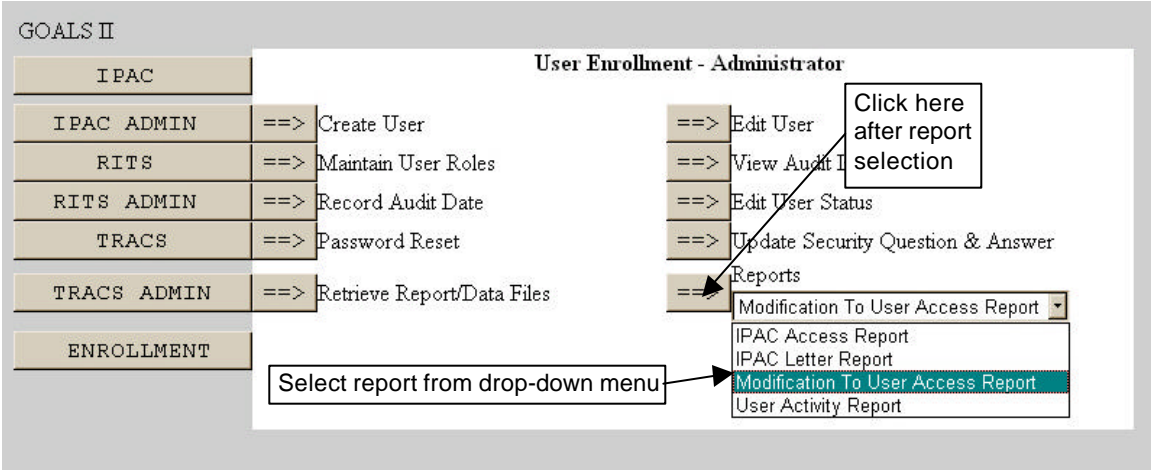


Figure 1.45 Modification to User Access Report Menu Selection

To run this report, select and highlight "Modification to User Access Report" from the drop down menu by the "Reports" function button, then select the "Reports" button. The **Modification to User Access Report Request** screen, shown in Figure 1.46, will display.

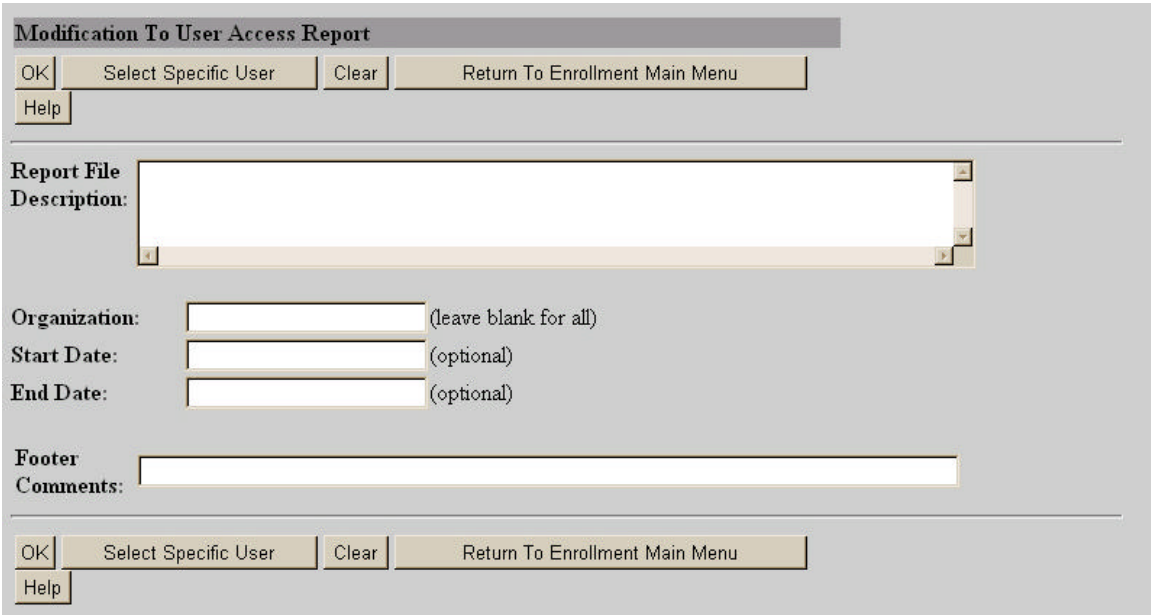


Figure 1.46 Modification to User Access Report Request screen

Modification to User Access Report Request data entry fields:

Report File Description

This field is discussed in the *Introduction* under *Viewing and Printing Reports*. This field is not required, but its use is strongly recommended.

Organization

To view the modifications to user access for a single IPAC Organization (ALC or Payroll Office), enter the ALC or Payroll Office Number in this data entry box. If no organization is entered in this box, the report will contain all modifications stored in the IPAC database (restricted by start and end dates if specified) which your Login ID authorizes you to view.

Start Date

End Date

Enter the dates for which you want to generate Modification to User Access report. Dates must be entered in YYYY-MM-DD format. User Access modifications made before the Start Date or after the End Date will not appear on the report. These dates are optional. If no dates are entered, the report will contain all modifications stored in the IPAC database which your Login ID authorized you to view.

Footer Comments

This field is discussed in the *Introduction* under *Viewing and Printing Reports*. The field is not required.

Modifications to User Access Report Request function buttons:

“OK”

This button accepts the Report File Description, Organization and Start and End dates (if those are specified) and generates the data for Modification to User Access report (as restricted by the date options and your Login ID authority), then displays the **Report Statistics Screen** discussed in the *Introduction*.

“Select Specific User”

Accepts the information entered on the **Report Request** screen as the report description and report footer and displays the **Find User** screen shown in Figure I.4 in the *Introduction* under *Viewing and Printing Reports*.

“Clear”

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

“Return to Enrollment Main Menu”

Returns to the **Enrollment Main Menu** screen without saving any information entered and without generating the report.

“Help”

Displays system help information for this screen.

A sample of the Modification to User Access Report for a specific IPAC Organization is shown in Figure 1.47.

MODIFICATION TO USER ACCESS

LOGIN ID	USERNAME	ORGANIZATION	ACTION	UPDATED BY	APPL.	ROLE
e1aba002	Agency B. Administrator	20180002	Created	e1dam001		
e1jad002	Jane A. Doe	20180002	Suspended Updated	e1aba001 e1aba001		
e1kot001	Keep O. Trukin	20180002	Revoked Revoked Updated	e1aba001 e1aba001 e1aba001		
e1sbu001	Sample B. User	20180002	Updated	e1sbu001		
e1sbu006	Sample B. User	20180002	Created	e1dam001		

1 of 1

Sample Modification to User Access

Report Requested by: Agency B. Administrator

Figure 1.47 Modification to User Access Report

User Activity Report

This report reflects the access that has been made to the IPAC system by a specific user.

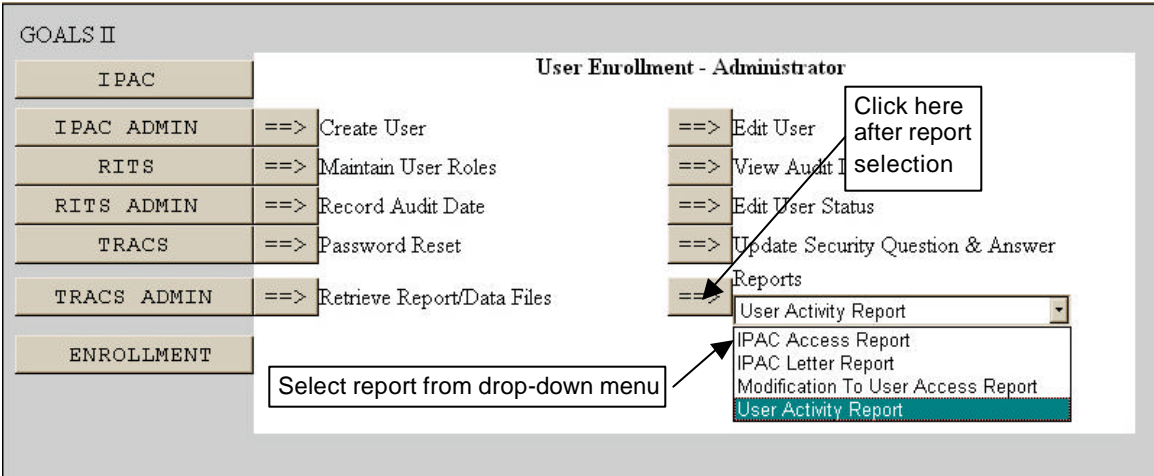


Figure 1.48 IPAC Access Report Menu Selection

To run this report, select and highlight "User Activity Report" from the drop down menu by the "Reports" function button, then select the "Reports" button. The **User Activity Report Request** screen, shown in Figure 1.49, will display

User Activity Report Request Screen

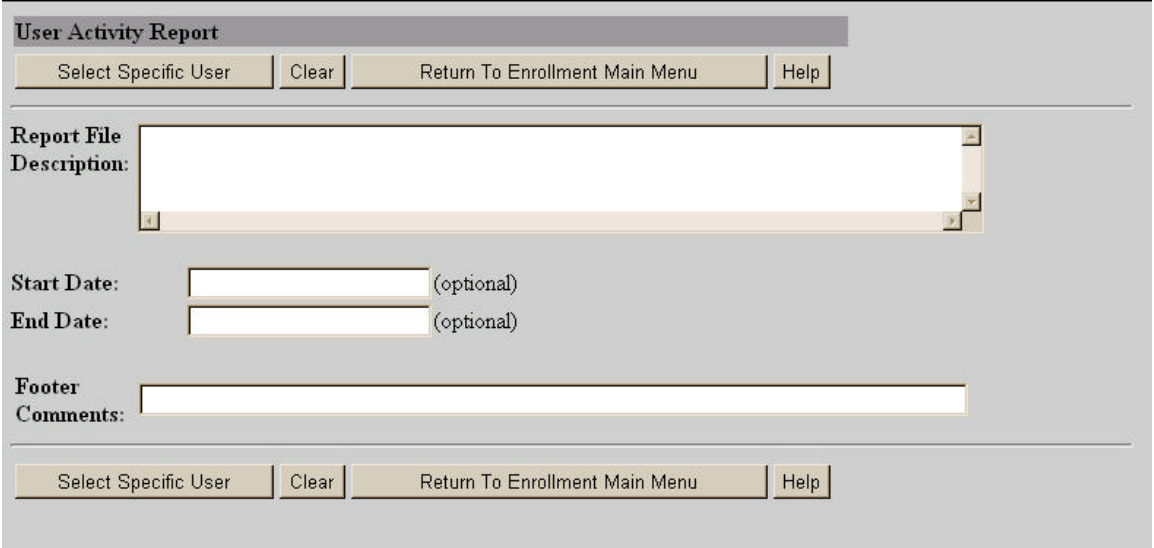


Figure 1.49 User Activity Report Request

User Activity Report Request data entry fields:

Report File Description

This field is discussed in the *Introduction* under *Viewing and Printing Reports*.
This field is not required, but its use is strongly recommended.

Start Date

End Date

Enter the dates for which you want to report on User Activity. Activity before the Start Date or after the End Date will not appear on the report. These dates are optional. If no dates are entered, all IPAC activity for the specified user will be reported.

Footer Comments

This field is discussed in the *Introduction* under *Viewing and Printing Reports*.
The field is not required.

IPAC Access Report Request function buttons:

“**Select Specific User**”

Accepts the information entered on the **Report Request** screen as the report description, report footer and date range and displays the **Find User** screen shown in Figure 1.4 in the *Introduction* under *Viewing and Printing Reports*.

“**Clear**”

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

“**Return to Enrollment Main Menu**”

Returns to the **Enrollment Main Menu** screen without saving any information entered and without generating the report.

“**Help**”

Displays system help information for this screen.

A sample of the User Activity Report is shown in Figure 1.50.

USER ACTIVITY

All Application Activity for Login e1sbu003

Date	Time	Controller Name	Organization	Organization Type	Elapsed Time (in seconds)
09/26/2001	14:45:27	org.frb.rich.ipac.bus.E_4_1_0_0_ChangeSecurityQuestionOKController	00000000	ALC	0.031
09/26/2001	14:45:33	org.frb.rich.ipac.bus.GOALSMenuIPACController	00000000	ALC	0.016
09/26/2001	14:45:45	org.frb.rich.ipac.bus.IPACMenuCollectionController	20180002	ALC	0.156
09/26/2001	14:45:50	org.frb.rich.ipac.bus.GOALSMenuIPACController	00000000	ALC	0.015
09/26/2001	14:46:17	org.frb.rich.ipac.bus.I_4_1_1_3_AgencySpecialRequirementsReportAllController	20180002	ALC	18.000
09/26/2001	14:46:46	org.frb.rich.ipac.bus.GOALSMenuIPACController	00000000	ALC	0.016
					18.234

1 of 1 9/26/01

Report Requested by: Sample B. User Sample User Activity Report E_1_0_1_1_UserActivity.md

Figure 1.50 Sample User Activity Report

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Appendix A Roles and Functions

IPAC Roles and Functions

User Role	Function Performed
IPAC Reports	<ul style="list-style-type: none"> • Access to the following reports: <ul style="list-style-type: none"> Agency Special Requirements Batch Processing Status EDI Activity Report* FMS / Agency Request Partner Profile Information* Headquarters Transaction Download Headquarters Transactions IPAC Transaction Report Download IPAC Transaction Report Selection Parent / Child Relationships Predecessor / Successor ALCs Store and Distribute Activity Information Treasury Reporting Requirements Zero Dollar Transaction • Retrieve Report / Data Files* • Report Retention Management • Display Messages <p>* future release</p>
IPAC User	<p>Same access rights as the IPAC Reports role, plus</p> <ul style="list-style-type: none"> • Payment • Collection • Adjustment • Zero Dollar • Incomplete Transactions • Agency Special Requirement Request Status

IPAC Supervisor	<p>Same access rights as the IPAC Reports role, plus</p> <ul style="list-style-type: none"> • Agency Billable Request • Agency Billable Status • Request Special Requirements • Agency Special Requirement Request Status • Request Parent / Child Relationship • Agency Request for EDI Trading Partner Profile* • Update Agency Information • Display Messages <p>* future release</p>
Bulk File Submitter	<ul style="list-style-type: none"> • Submit Bulk IPAC Transactions • Display Messages • Access to the following report: Batch Processing Status • Retrieve Report / Data Files* • Report Retention Management <p>* future release</p>
IPAC System Log	<ul style="list-style-type: none"> • Admin Processing Status
IPAC Bulk Automation	<ul style="list-style-type: none"> • Automated Submission of Bulk IPAC Transactions

TRACS Roles and Functions

User Role	Function Performed
TRACS Reports	<ul style="list-style-type: none"> • Display Messages • Access to the following reports: <ul style="list-style-type: none"> Extract and Create TRACS Reports TRACS Transaction Download • Retrieve Report / Data Files* • Report Retention Management <p>* future release</p>
Bulk File User	(Available in a future release of IPAC)
TRACS System Log	<ul style="list-style-type: none"> • Admin Processing Status
TRACS Bulk Automation	(Available in a future release of IPAC)

RITS Roles and Functions

User Role	Function Performed
RITS Accountant	<ul style="list-style-type: none"> • Display Messages • Retrieve Report / Data Files* • Report Retention Management • Access to the following reports: <ul style="list-style-type: none"> Available 2812 and 2812A Reports Health Benefit Enrollment Codes Holiday Schedule <p>* future release</p>
RITS Payroll Clerk	<p>Same access rights as the RITS Accountant, plus</p> <ul style="list-style-type: none"> • 2812 (cannot create estimated or model estimated – can create an original and supplemental, can also edit an original or supplemental prior to drawdown)
Bulk File Submitter	<ul style="list-style-type: none"> • Submit Bulk 2812s • Retrieve Report / Data Files* • Report Retention Management • Display Messages <p>* future release</p>
RITS Payroll Admin	<p>Same access rights as the RITS Accountant, plus</p> <ul style="list-style-type: none"> • 2812 (cannot create estimated or model estimated – can create an original and supplemental, can also edit an original or supplemental prior to drawdown) • Payroll Office / Pay Cycle
RITS System Log	<ul style="list-style-type: none"> • Admin Processing Status
RITS Bulk Automation	<ul style="list-style-type: none"> • Automated Submission of Bulk 2812s

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Appendix C Configuring Netscape Navigator® to save PDF files

If your Netscape Browser does not give you the option to save a .PDF file to disk, you will need to reconfigure this file type in Navigator. Select Edit from Netscape's Menu Bar.

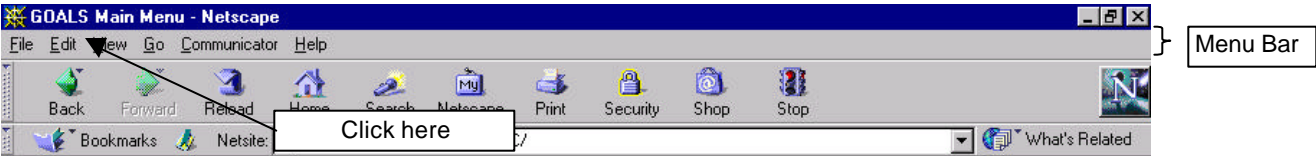


Figure C.1 Netscape Navigator® Menu Bar

A drop-down menu similar to that shown in Figure C.2 will display.

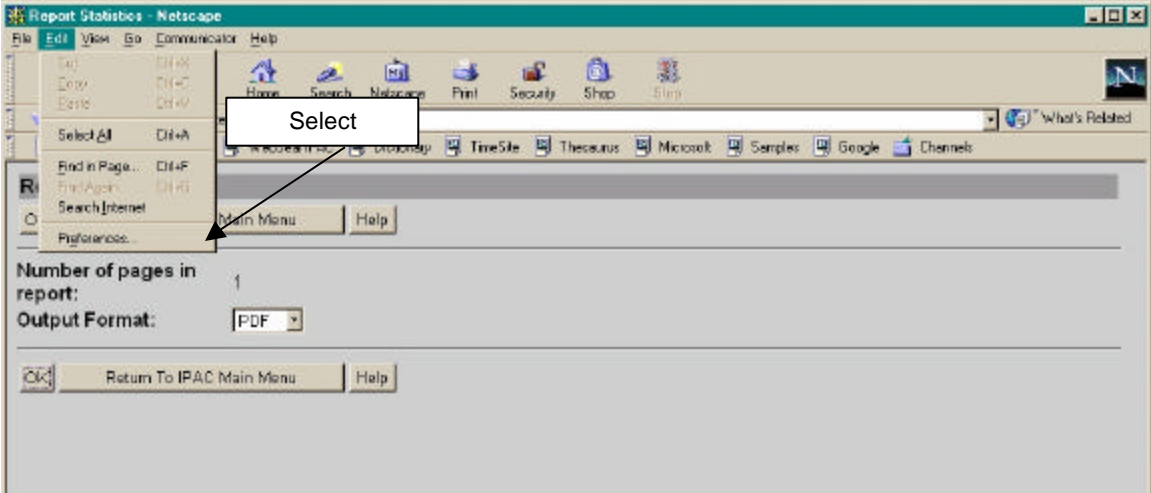


Figure C.2 Netscape Navigator® Edit Menu

The "Preferences" command on the Edit Menu displays a Preferences dialog box as shown in Figure C.3

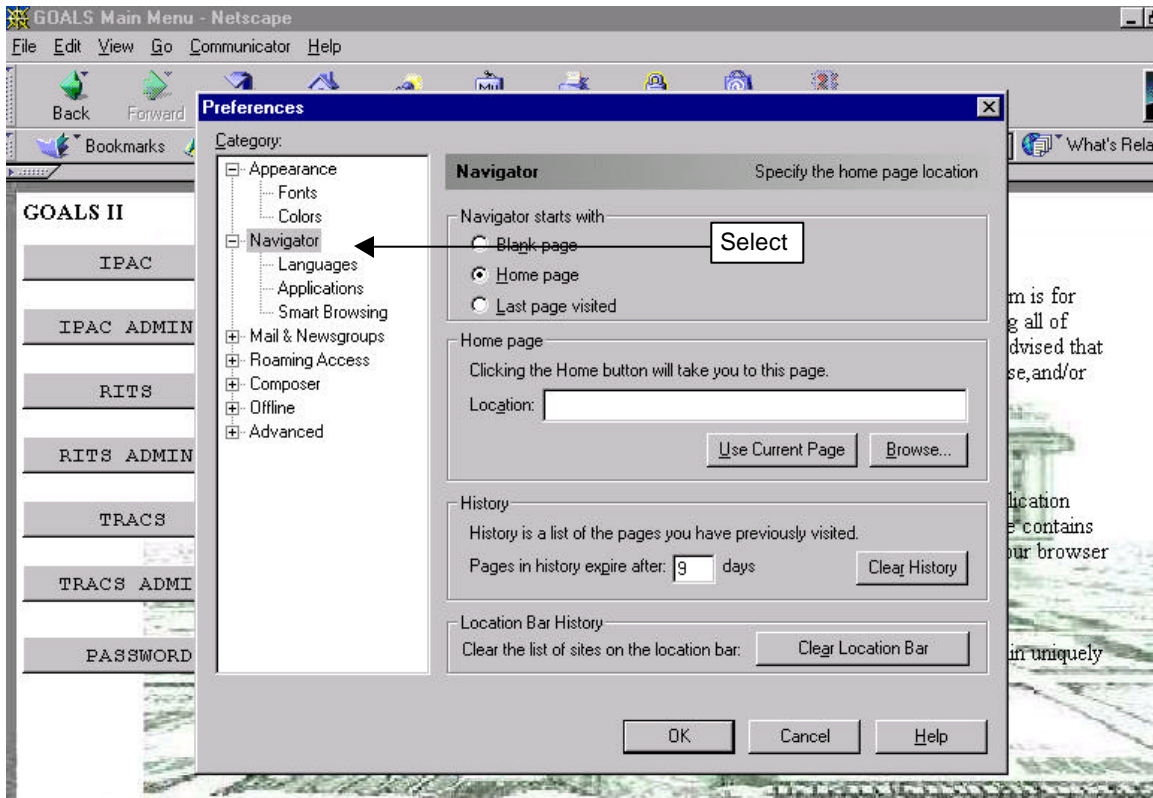


Figure C.3 Netscape Navigator® Preferences/Navigator Dialog Box

In the Category window, choose Navigator/Applications and a Description window will display as shown in Figure C.4

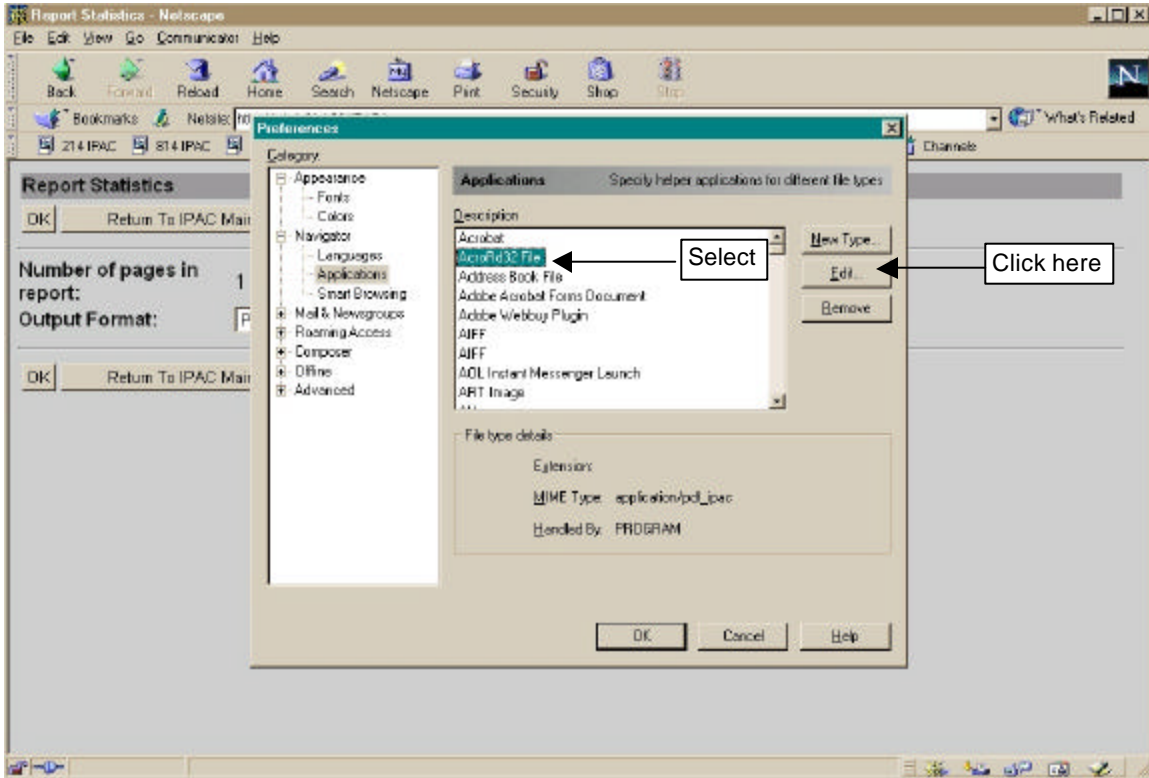


Figure C.4 Netscape Navigator® Preferences/Applications Dialog Box

In the Description select **AcroRd32 File** (or **AcroRd16 File**) and click Edit.

The Edit Type dialog box will display. Leave all of the options as you find them with the exception of the “Ask me before opening downloaded files of this type” box. Click this box to insert a check mark.

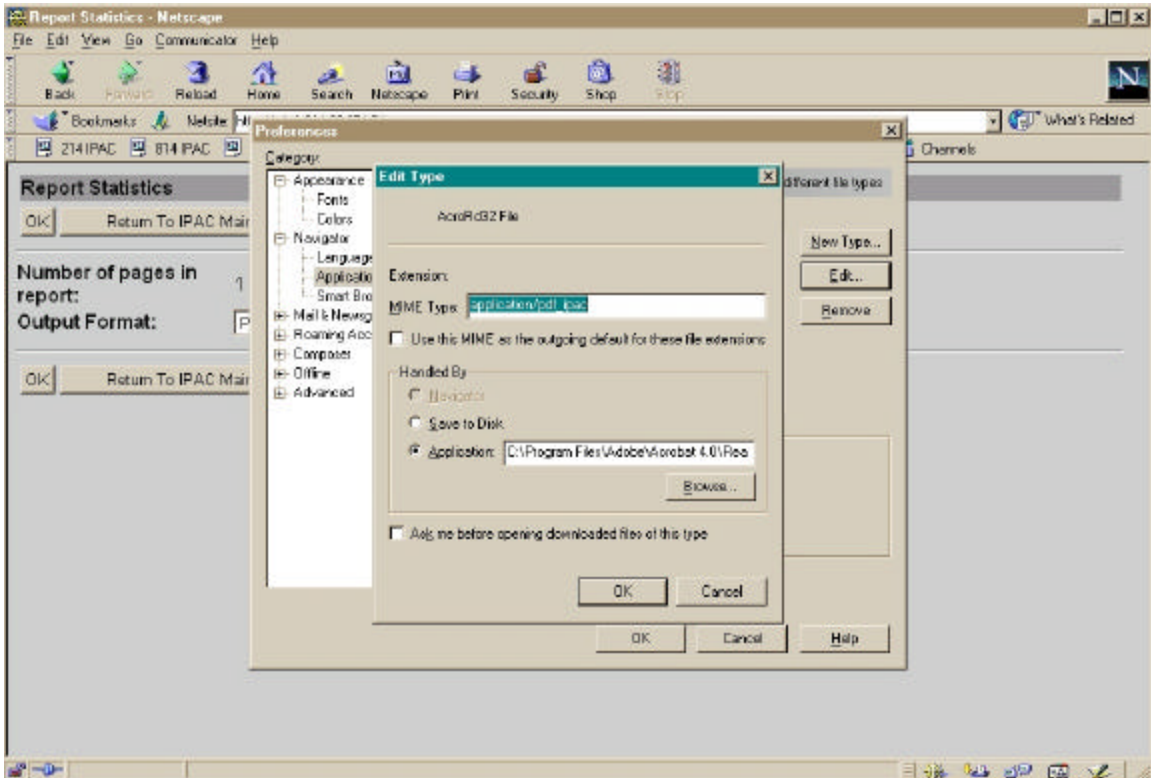


Figure C.5 Netscape Navigator® Edit Type Dialog Box

Click “OK” to save your change and close this dialog box, and “OK” again to close the Navigator/Applicator dialog box. This will return you to the main Netscape screen. The next time you choose a PDF file as your output option from a **Report Statistics** screen, you should see the Security Warning dialog box referenced the in *Introduction* and shown in Figure C.6.

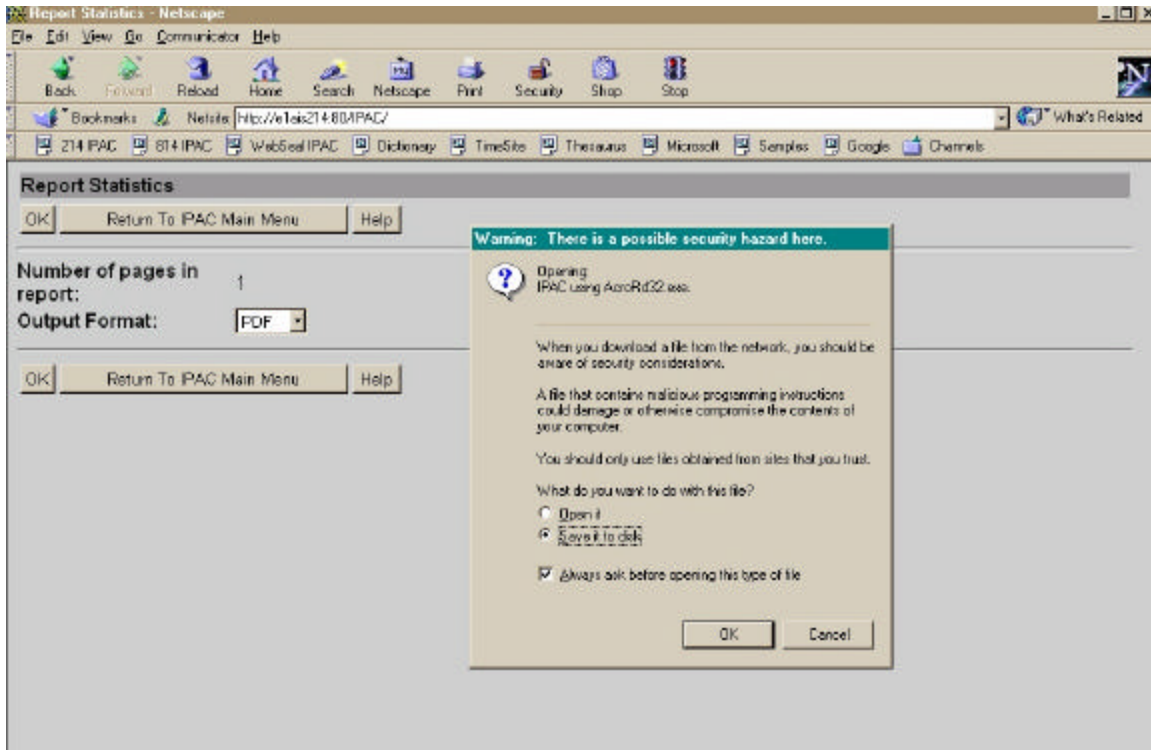


Figure C.6 Netscape Navigator® Security Warning Dialog Box

In Microsoft's Internet Explorer you cannot accidentally configure the MIME type for PDF files only to open without the option of being saved. The option "Always ask before opening this type of file" is dimmed and the check mark cannot be removed from the "File Download" dialog box for .pdf, .exe or .com files.

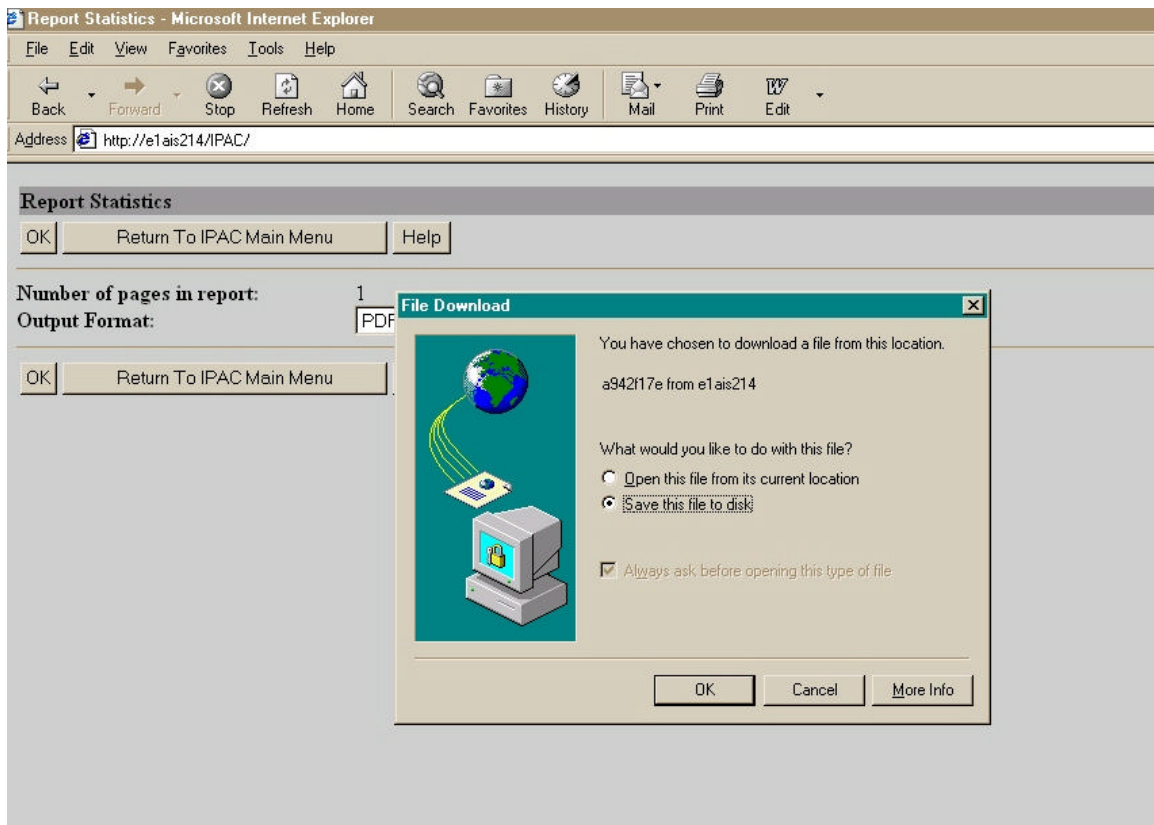


Figure C.7 Microsoft Internet Explorer® File Download Dialog Box

Appendix D Configuring Browsers to Accept Cookies

What are Cookies?

A cookie is a file sent to a web browser by a web server. It is used to store information about users and their preferences so the server does not have to repeatedly request the information. When the browser requests additional files, the cookie information is sent back to the server.

The name "cookies" comes from "magic cookies" which are tokens used in the UNIX operating system. (An alternate theory is that the name comes from the story of Hansel and Gretel, who marked their path through the woods by dropping crumbs along their trail.)

Session cookies reside in your computer's memory until you close your browser. Long term cookies are written to your hard drive. Cookies can store information that you enter during your browser session, but they cannot read information stored in your computer.

Cookies are simple text files and cannot execute programs on your computer. You can use a text editor to view cookie files. In Netscape® Communicator 4.75, the file is called **cookies.txt** and is located in the same folder as Netscape. Macintosh users can find it in the Netscape folder in the System/Preferences folder. Internet Explorer creates separate files for each cookie and stores them in folders named **Cookies** or **Temporary Internet Files**.

What are the IPAC System Cookie Requirements?

The IPAC System Cookie Policy, as stated on the **IPAC System Main Menu** is:

Cookie Policy: The Department of Treasury, Financial Management Service Application web sites require and use a cookie for maintaining a connection. This session cookie contains a system generated ID only, is stored in memory and automatically deleted when your browser is closed.

Long-term (written to your hard-drive) cookies are also used to maintain optional preferences. These cookies only contain such preference settings; they do not contain uniquely identifying information and are not used for tracking purposes.

To access the IPAC applications, **cookies MUST be enabled**. The default value for most browsers, including Microsoft® Internet Explorer 5 and Netscape® Communicator 4.75, is that cookies are enabled. If you receive a error message regarding cookies when trying to access the IPAC applications on the Internet, check your browser settings to be sure that cookies are enabled.

If you or your agency are uncomfortable with having cookies enabled in your browser, you may choose “Prompt” as your cookie setting in Microsoft Internet Explorer 5.0 (see Figure D.4) or “Warn me before accepting a cookie” in Netscape Communicator 4.75 (see Figure D.7). You must still accept any cookies sent by the IPAC applications, but the warning will remind you of your cookie setting when you are accessing other sites through your browser. (This warning can quickly become irritating, so use this setting only if required by policy.)

Controlling Cookies in Microsoft® Internet Explorer 5

To configure your cookie settings, open Internet Explorer and from the menu bar, select **Tools > Internet Options** as shown in Figure D.1

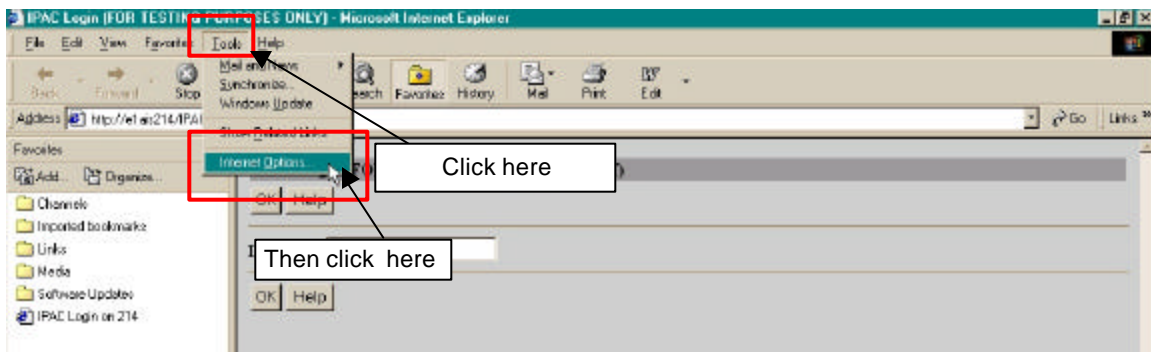


Figure D.1 IE5 Enabling Cookies--Step One

On the **Internet Options** window click the **Security** tab as shown in Figure D.2

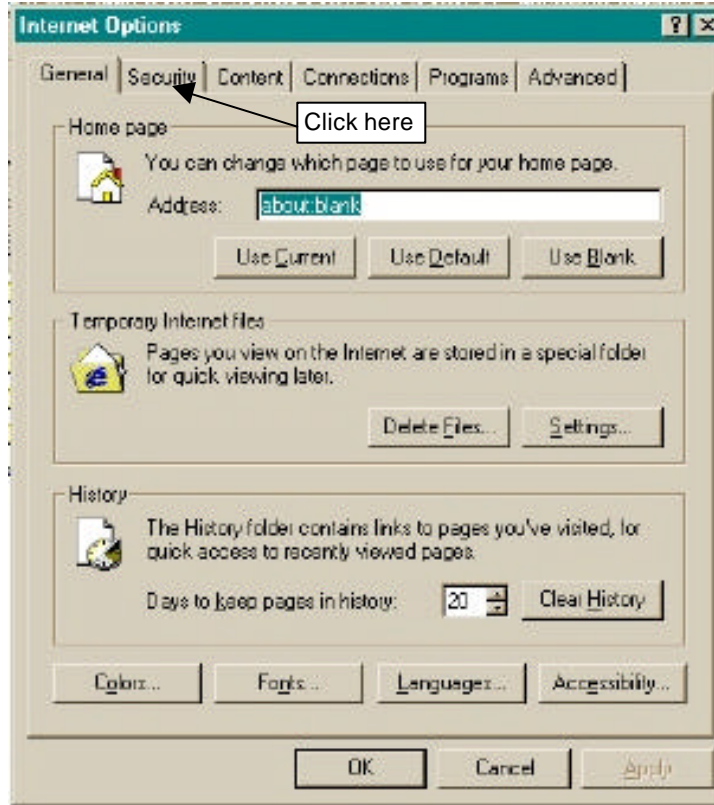


Figure D.2 IE5 Enabling Cookies--Step Two

On the **Internet Options Security** window click the **Custom Level** button. As shown in Figure D.3.

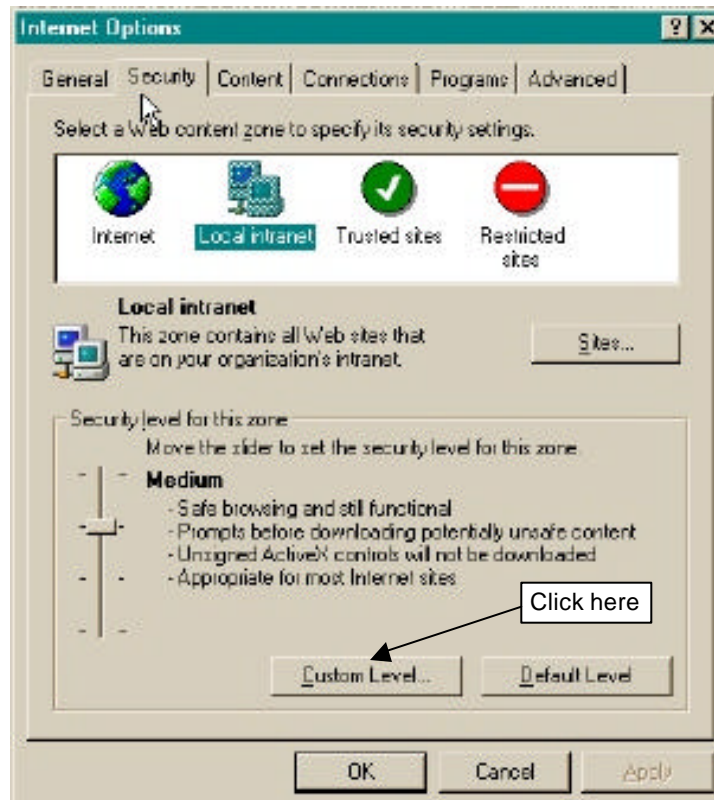


Figure D.3 IE5 Enabling Cookies--Step Three

In the **Settings** window:

- 1) Scroll down to the **Cookies** area.
- 2) In the "Allow cookies that are stored on your computer" section, choose "Enable," or "Prompt."
- 3) In the "Allow per-session cookies (not stored)" section, choose "Enable," or "Prompt."
- 4) Click "OK" to close the **Security Settings** window.

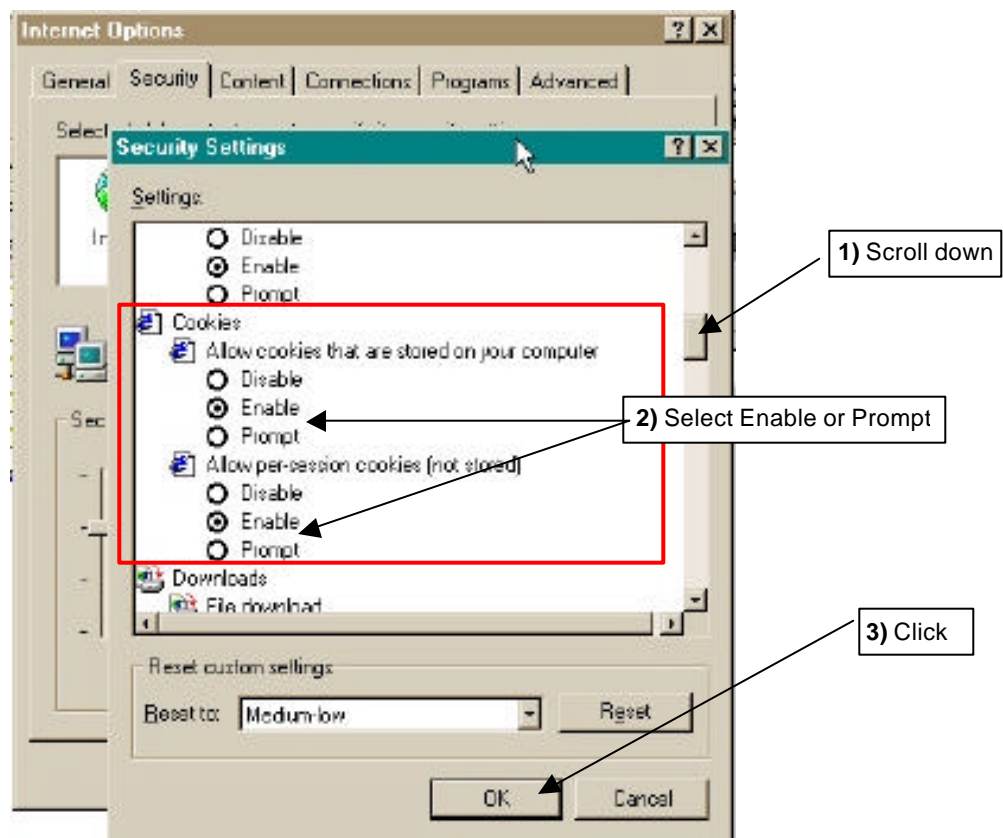


Figure D.4 IE5 Enabling Cookies--Step Four

Click "OK" to close the Internet Options window.

Controlling Cookies in Netscape® Communicator 4.75

To configure your cookie settings, open Netscape Communicator and from the menu bar, select **Edit > Preferences** as shown in Figure D.5

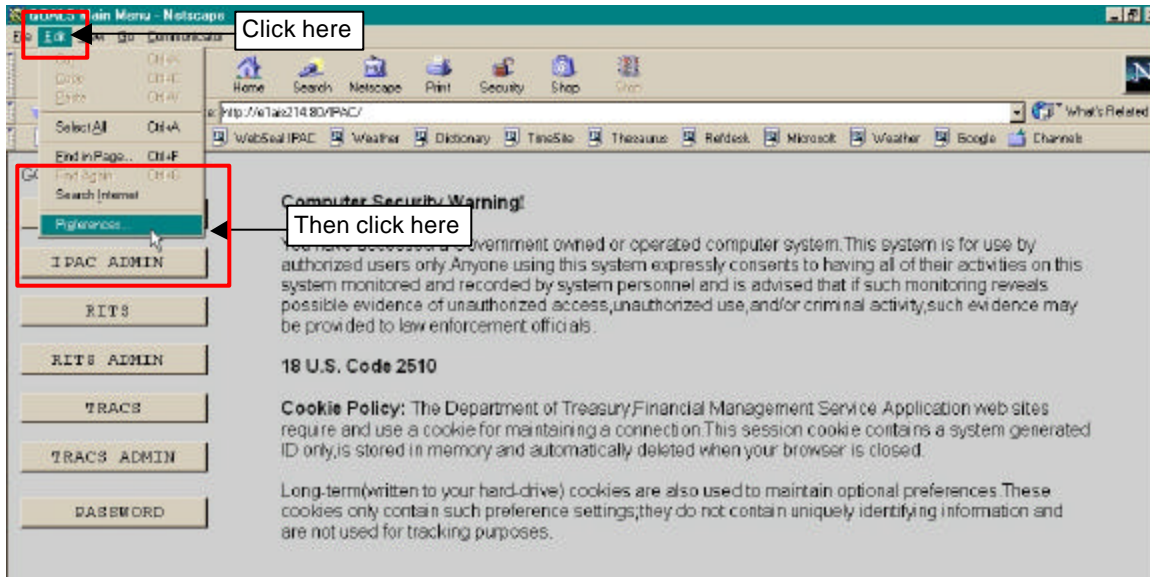


Figure D.5 Netscape Enabling Cookies--Step One

In the **Preferences** window, click the Advanced category as shown in Figure D.6.

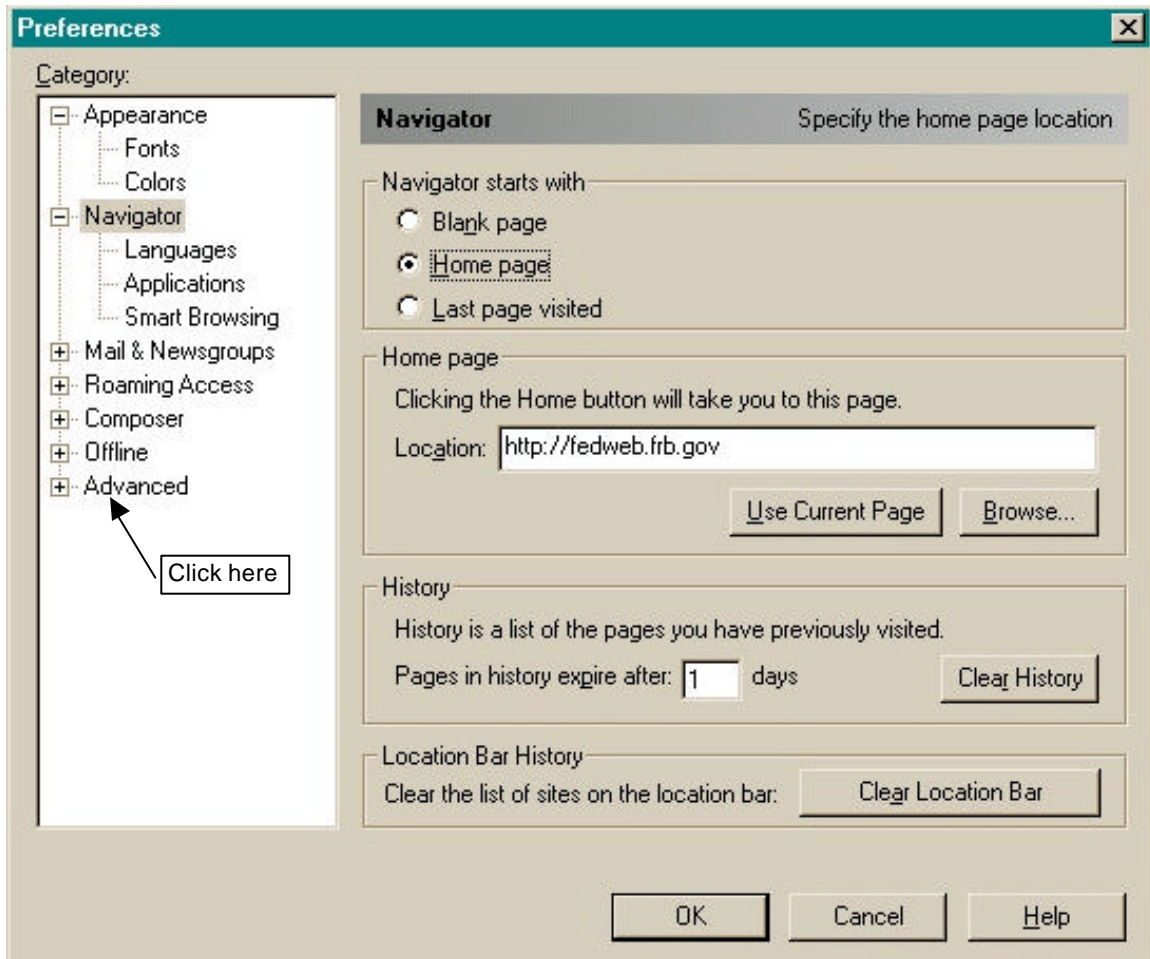


Figure D.6 Netscape Enabling Cookies--Step Two

In the **Preferences, Advanced** window, under **Cookies** select “**Accept all cookies**” or “**Accept only cookies that get sent back to the originating server**” as shown in Figure D.7.

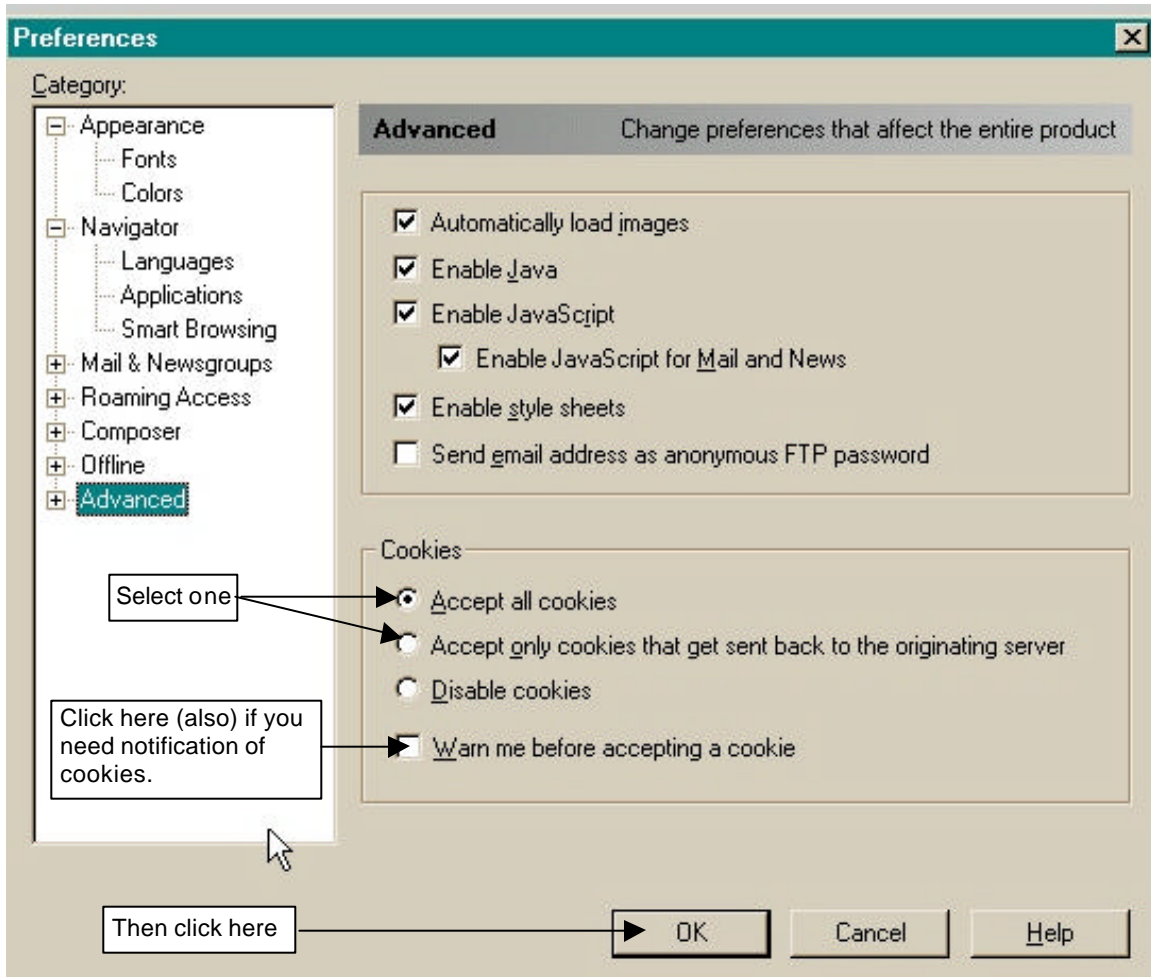


Figure D.7 Netscape Enabling Cookies--Step Three

Click “OK” to save your new configuration and close the **Preferences** window.

Appendix E Glossary of Terms and Acronyms

Agency Federal Government Agency

ALC (Agency Location Code) A 3(RFCs), 4(DOs) or 8 (use RFCs for disbursement) digit identifier assigned by FMS for Treasury reporting purposes. The first two digits on the 8-digit ALC identify the department of agency, the third and fourth digits identify the particular bureau within the department, and the remaining four digits identify the particular agency account section within that bureau.

Browser A software package used to display documents on the Internet. IPAC has been designed and tested with both Microsoft Internet Explorer and Netscape Navigator version 4.0 or higher.

Enrollment A GOALS II application which handles the administration and security for the entire IPAC program group.

FMS (Financial Management Service) The U.S. Government's financial manager, central disburser and collections agent as well as its accountant and reporter of financial information, the FMS is a bureau of the Treasury Department.

FPA (Federal Program Agency) An employing agency of the Federal Government.

GOALS II (Government On-Line Accounting Link System II) The system that allows FMS to receive Agency accounting data and forward it to various systems within FMS for final processing and to distribute Agency accounting reports.

HTML (HyperText Markup Language) The document format used on the World Wide Web.

IPAC (Intra-governmental Payment and Collection System) An Internet based GOALS II application for interagency payment and collections transactions.

Login ID The 8 alphanumeric characters assigned to the user to uniquely identify that user.

Mail Stop 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 first address.

RITS (Retirement and Insurance Transfer System) A GOALS II application used to automate the transfers of Federal employees' health benefit, retirement and life insurance program information and payments.

TRACS (Treasury Receivables Accounting Collection System) 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).

User Status There are three possible status levels for a User's Status: Active, Suspended and Revoked.

Active

The Active status should be used for all working Login IDs that have access to the applications.

Suspended

If a user will not be using the IPAC applications for an extended period of time, due to a vacation, leave of absence, temporary change in job duties or for some other reason, the user's authorizations should be Suspended until he again needs access to the IPAC system. The Login ID needs to be placed in an Active status when the employee returns to work. Suspending access for a Login ID reduces the risk of unauthorized entry into the applications through the use of this ID.

Revoked

The Revoked status needs to be assigned to Login IDs that will not be used any more. If an employee doesn't require access to the IPAC applications anymore, this status should be used. The Login ID may be placed back in an Active status if needed. Login IDs are not deleted from the system.

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