



## **TRS Topics:**

# **Security Users Recertifying Users**

Hello and welcome to TRS Topics. In this presentation, we will discuss how you recertify users in your group.

This is a particularly important topic because FMS policy mandates that each user of the TRS application must be recertified annually.

If you need an overview of your roles and responsibilities as a security user, please view the presentation entitled Roles and Responsibilities.

The Transaction Reporting System of the United States Treasury

## Notification of Recertification

**noreply.trs@pnc.com**  
05/09/2012 03:31 AM  
Please respond to  
noreply.trs@pnc.com

To: security.user@agency.us.gov  
cc:  
bcc:  
Subject: TRSDO - TRS User Recertification Needed

User Name: John Smith

This TRS user's certification to access TRS will expire on 6/7/12 1:48 PM. Access the TRS Recertify User function to perform the recertification function.

TRS Call Center  
1-800-346-3465  
301-887-6600  
TRS@pnc.com

Department of the Treasury  
Financial Management Service **fms**

2

**PNC**

As a security user, one of your important responsibilities is to recertify users annually as their logins expire.

You will receive an e-mail notification like the one pictured here for each user in your group 30 days prior to the expiration of their user ID.

Treasury's Financial Management Service has a Financial Agent Agreement with PNC to provide support services for TRS, so e-mails from the TRS Call Center and other operations groups will come from pnc.com. Please make sure your e-mail system does not block these messages.



Log into TRS and from the top menu bar, click Security and then click Recertify Users from the drop-down menu.

TRS displays the next screen to begin the three-step process to recertify the pending users in your access group.

**Pending Recertification Users**

Help

Pending Recertification Users

| User ID  | Last Name | First Name | Date of Last Successful Logon | Last Recertification Date | User Details |
|----------|-----------|------------|-------------------------------|---------------------------|--------------|
| Smith99  | Smith     | John       | 2010-03-25 10:11:41.0         | 2009-04-19 00:00:00.0     | Select       |
| SmithT09 | Smith     | Thomas     | 2010-03-09 11:09:02.0         | 2009-04-19 00:00:00.0     | Select       |
| SmithW02 | Smith     | Wendy      | 2010-03-24 16:47:45.0         | 2009-04-19 00:00:00.0     | Select       |
| SmithZ03 | Smith     | Zelda      | 2010-03-22 11:42:07.0         | 2009-04-19 00:00:00.0     | Select       |

Cancel

Click the Select button next to the user who requires recertification to advance to the next screen.

The Transaction Reporting System of the United States Treasury

## Review and Confirm User's Information

### Recertify Users Help

**User Profile Information**

User ID: SMITH99  
Community Name: FPA  
Access Group Name: 148  
First Name: John  
Middle Initial:  
Last Name: Smith  
Suffix:  
User Profile Status: ACTIVE

User Profile Status Change Reason:  
Set to active with password  
reset

Last Recertification Date: 05/20/2011  
Recertified By: TRS  
Recertification Status: PENDING

Department of the Treasury  
Financial Management Service **fms**

5

**PNC**

On this screen, review the user's information. If changes to the user's role, data permissions, or personal information are needed, please exit this screen, return to the TRS home page, and use the Manage User Profile option from the Security drop-down menu to make the required changes. You can then retrieve this user's profile again from the list of users pending recertification and return to this screen.

When you are ready to confirm the recertification, click the Approve button at the bottom of the screen.

The Transaction Reporting System of the United States Treasury

## Receive Confirmation

**Confirmation** Help

Recertify Users Confirmation  
User "John Smith" has been Approved successfully for recertification.

←

Department of the Treasury **fms**  
Financial Management Service

6

**PNC**

When TRS finishes recertifying the user, you will see a confirmation screen. Click the OK button.

The next time this user logs in to TRS, he must electronically reconfirm that he has read and understands the TRS Rules of Behavior before he can work with TRS.

The Transaction Reporting System of the United States Treasury

## Additional Resources

- TRS Call Center
  - 800-346-5465
  - 301-887-6600
  - [trs@pnc.com](mailto:trs@pnc.com)
- TRS Agency Outreach Team
  - 301-699-6814
  - [TRSAgencyOutreach@pnc.com](mailto:TRSAgencyOutreach@pnc.com)
- TRS User Manuals
  - TRS Security User Reference Manual
  - TRS Agency Reports Help
  - Business Objects General Help

**CASHLINK II SHUTS DOWN DECEMBER 31, 2012**

Department of the Treasury  
Financial Management Service **fms**

7

**PNC**

Here are additional resources for you should any questions arise about your role as a security user.

Remember, CASHLINK II is scheduled to be shut down on December 31<sup>st</sup>, 2012. It is important for you to ensure that the proper users in your group are active in TRS.

Thank you for viewing this TRS Topics presentation. The TRS Team is developing these presentations as another learning tool for you. Please let us know if you find this format helpful and if there are other topics you would like to have covered. Over the next few months, we'll be adding more information to the TRS Website.

We encourage you to send us feedback at [TRSAgencyOutreach@pnc.com](mailto:TRSAgencyOutreach@pnc.com).