



# TRS Topics:

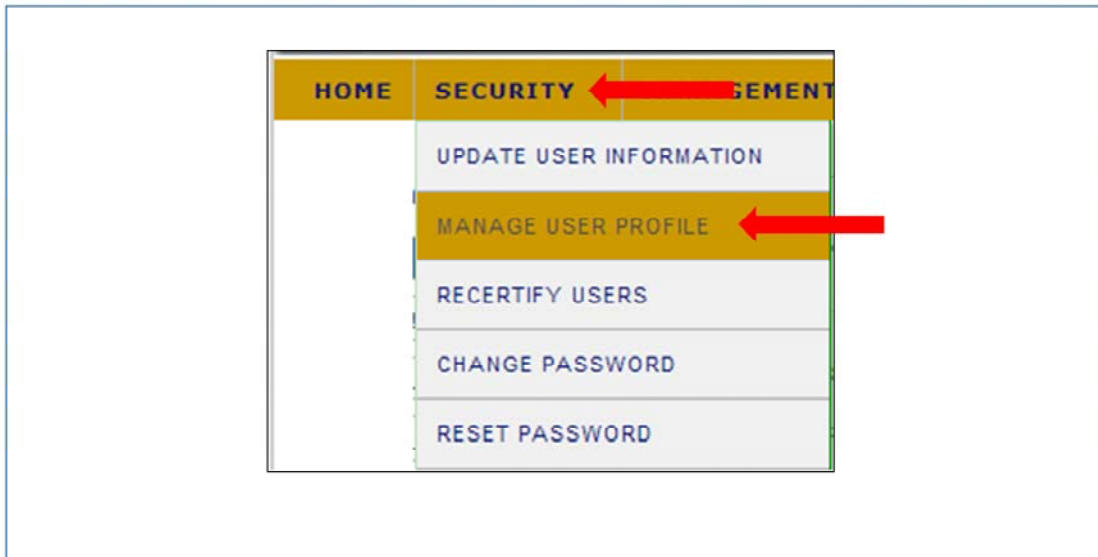
## Security Users

### *Managing User Profile*

Hello and welcome to TRS Topics for Security Users. In this session, we will discuss how to review and update the profile information and data access for users in your group.

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

One of your duties as a security user is to manage the system access of people in your group. The Manage User Profile function allows you to manage the status, roles, and data permissions for each user.



On the TRS home page, click the Security option on the top menu bar, then click Manage User Profile.

Note that you cannot alter your own permissions. Another security user in your group must do this for you. This is one of the reasons why TRS requires each group to have at least two active security users.

**Manage User Profile** Help

User Profile Search Entry

User ID :	<input type="text"/>	User Profile Status :	<input type="text" value=""/>
First Name :	<input type="text"/>	Last Name :	<input type="text" value="Smith"/>
Community Name :	<input type="text" value=""/>	Access Group Name :	<input type="text" value=""/>
Security User :	<input type="text" value=""/>		

The User Profile Search entry allows you to retrieve the record for the user you are assisting. Enter at least one search option, such as Last name, and click the Search button.

[Help](#)

### Manage User Profile

User Profile Search Entry

User ID : <input type="text"/>	User Profile Status : <input type="text"/>
First Name : <input type="text"/>	Last Name : <input type="text" value="Smith"/>
Community Name : <input type="text"/>	Access Group Name : <input type="text"/>
Security User : <input type="text"/>	

Create User Profile

User Profile Search Results

User ID	Last Name	First Name	User Profile Status	Security User	Community Name	Access Group Name	Action
SMITH09	SMITH	JOHN	ACTIVE	NO	FPA	AGENCY.US.GOV	Select

TRS returns a list of users meeting your search parameters. Scroll through the list to locate the user you want to modify.

Click the Select button to the right of the user's information.

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## Verify and Correct General User Information

Update User Profile

User ID: SMITH99

Community name: FPA

Access Group Name: agency.us.gov

First Name: John

Last Name: Smith

Street Address 1: 123 Main St.

City: Washington

State: DC

Postal Code: 20000

Country: USA

Phone Number 1: 202-555-1212

Phone Number 2:

Fax Number:

Email: john.smith@agency.us.gov

PII Access: Yes

User Profile Status: REVOKED

User Profile Status Change Reason: Profile revoked due to inactivity for 120 days or more

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On the General User Profile Information Screen, you can modify any of the editable fields. You can enter several contact phone numbers for the user, and for each one, you can specify whether it is a standard US phone number, an international phone number, or other special number.

Two important features of user information are the user's status and level of access to personally identifiable information, or PII. For example, you can reactivate a revoked or closed user, you can close a user who has left your group, and you can add PII access for someone who meets your agency's requirements for that system privilege. The next slide has more information about Status and PII.

When you change a user's status, you also need to enter the reason you have done so. Type the reason in the User Profile Status Change Reason text box.

If you need to reactivate a Revoked or Closed user, please view the TRS Topics presentation entitled Reactivating Users.

TRS
User Status and PII Access

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\* User Profile Status : ACTIVE ▾

- ACTIVE
- CLOSED
- REVOKED
- SUSPENDED

Users are Active when they log in at least every 4 months, otherwise they become Revoked and then Closed.

You need to close user accounts when people leave your agency or should no longer have access to your agency's collections data.

When you reset a user's password but the person doesn't log in, the account becomes Suspended.

\* PII Access : Yes ▾

- Yes
- No

PII Access determines whether a user can see information that potentially identifies a transaction record for an individual, for example:

- \* Credit card number
- \* Payer address details

Refer to the TRS Security User Reference Manual and the TRS Topics presentation entitled **Reactivating Users** for more details about these features.

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The status of a user changes based on activity. If users don't log in at least every 120 days, they become Revoked, and then TRS closes their accounts automatically after 13 months of inactivity. Please refer to the *TRS Security User Reference Manual* and view the TRS presentation called *Reactivating Users* for detailed information.

You are responsible for closing the accounts of people who should no longer have access to your agency's collections data. Set the User Profile Status to Closed and describe briefly why you are closing this user in the User Profile Status Change Reason text box.

When you reset a password, the user needs to log in to TRS right away or the account becomes Suspended.

Access to Personally Identifiable Information (or PII) determines whether a user can see transaction details such as addresses and credit card numbers. Your agency will have guidelines to follow concerning granting this access.

The screenshot displays the 'Assign Roles' interface. At the top, a banner reads 'The Transaction Reporting System of the United States Treasury' with the 'TRS' logo and 'Assign Roles' text. The main window is titled 'Assign Roles' and contains a 'Help' button. It is divided into three sections: 'Available Roles' with a list including 'BO\_FPA\_SECURITY', 'Manage Extract File Definition', 'Security', and 'View Files'; 'Assigned Roles' with 'BO\_FPA\_GENERAL' (highlighted) and 'My TRS'; and 'Functions:' with 'BO\_FPA\_GENERAL'. Between the role lists are '>>' and '<<' buttons. At the bottom are '<< Back' and 'Next >>' buttons. The footer features the 'Department of the Treasury Financial Management Service' logo, the number '7', and the 'PNC' logo.

The next two screens govern the user's roles and data access. Please do not alter any of these values until you have studied the *TRS Security User Reference Manual* thoroughly and understand these options.

On the Assign Roles screen, you can add and remove roles. For example, if this user needs to be able to work with XML extract files, you can assign the roles associated with that work to him. When you reactivate a user who was Revoked or Closed, you need to reassign Roles.

Click the Next>> link at the bottom of the page to advance.

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## Assign Data Permissions

Assign Data Permissions

Select Data Type: Data Type:

Assign Data Permissions:  All  Custom  None

Search Data Permissions: ID:  Name:

Clear Search

Available Data Values: Selected Data Values

>> <<

Assign

Selected Data Permissions

Data Types	Data Values
Agency Location Code	00000000 - AGENCY.US.GOV

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On the Assign Data Permissions screen, you see the user's current data permissions and can modify the access.

When you reactivate a user who was Revoked or Closed, you need to reassign the Data Permissions.

Again, please do not alter any of this information until you have studied the *TRS Security User Reference Manual* fully.

Click the Next>> link at the bottom of the page to advance.



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# Review User Information and Submit

## User Profile Summary


General User Profile Information

User ID: SMITH99  
Community Name: FPA  
Access Group Name: AGENCY.US.GOV  
First Name: JOHN  
Middle Initial:  
Last Name: SMITH  
Suffix:  
Street Address 1: 123 MAIN ST  
Street Address 2:  
Street Address 3:  
City: WASHINGTON  
State: DC  
Postal Code: 20000  
Country: USA  
Phone Number 1 Format: Standard US  
Phone Number 1: 202.555.1212  
Phone Number 2 Format:  
Phone Number 2:  
Fax Number Format:  
Fax Number:  
Email:  
PII Access: No  
Security User: No  
User Profile Status: ACTIVE

Other:  
Ext:  
Other:  
Ext:  
Other:  
Ext:

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On the User Profile Summary slide, review the user's information, then click the Submit button at the bottom of the page.

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## Additional Resources

- TRS Call Center
  - 800-346-5465
  - 301-887-6600
  - 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**

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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. You'll find additional presentations on the TRS Web page. We encourage you to send us feedback at [TRSAgencyOutreach@pnc.com](mailto:TRSAgencyOutreach@pnc.com).