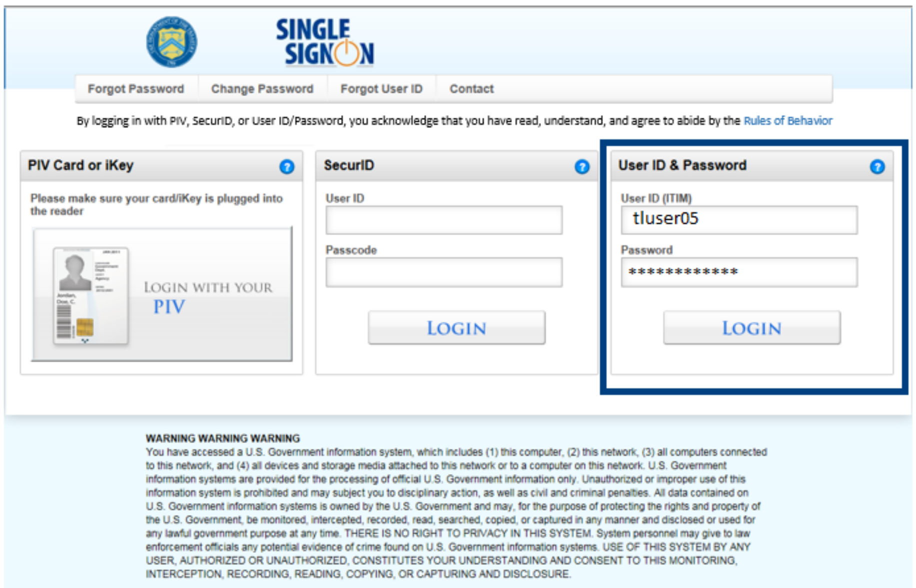
Intra-Governmental Payment and Collection (IPAC)

AA and MA Provisioning Guide

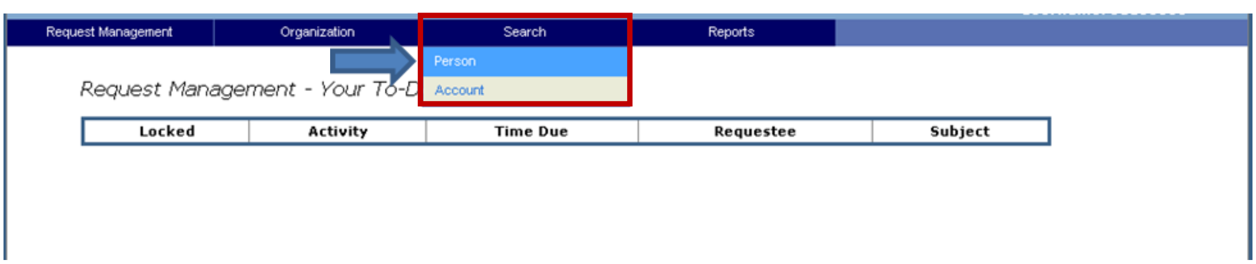
Agency Administrator (AA) – Submitting a User Access Request

This process requires action by two active ISIM users: an AA, who enters the access request and a second AA or an MA, who then approves it. <u>With the ISIM workflow, an MA does not have the ability to initiate a request on behalf of a user.</u>

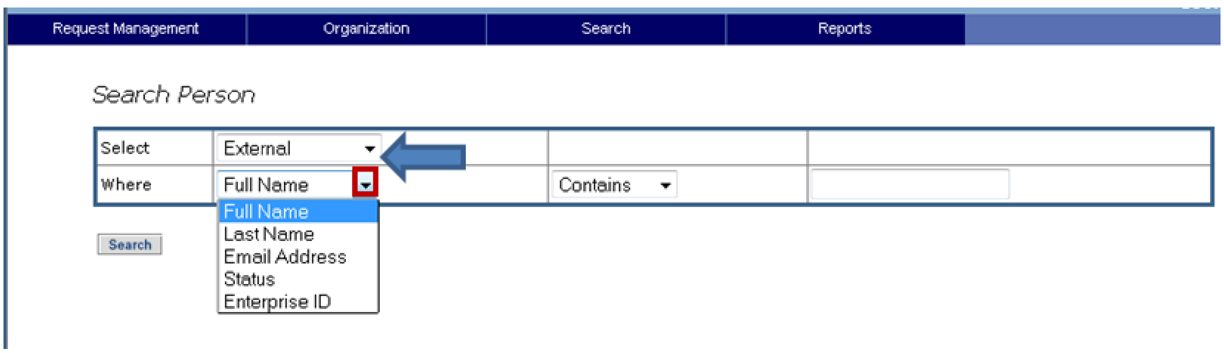
1. Access the **ISIM External Interface** at https://isim.fiscal.treasury.gov/itimext. Enter your user ID and password, and then click **LOGIN**.



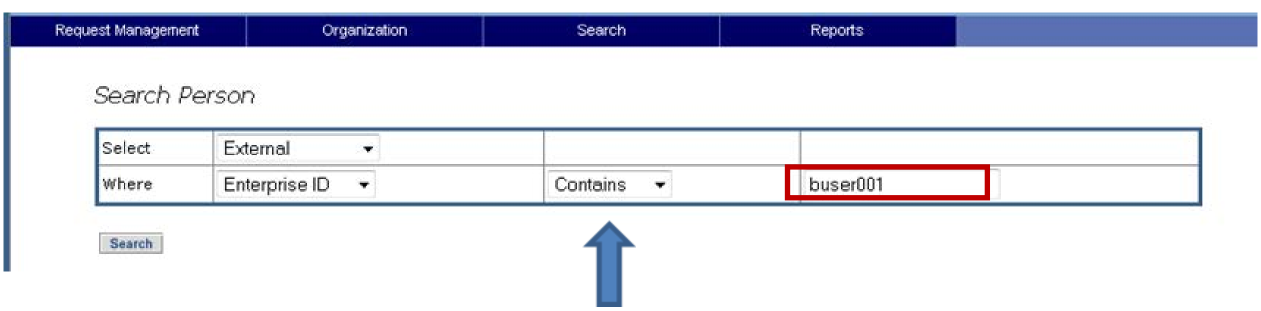
2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.



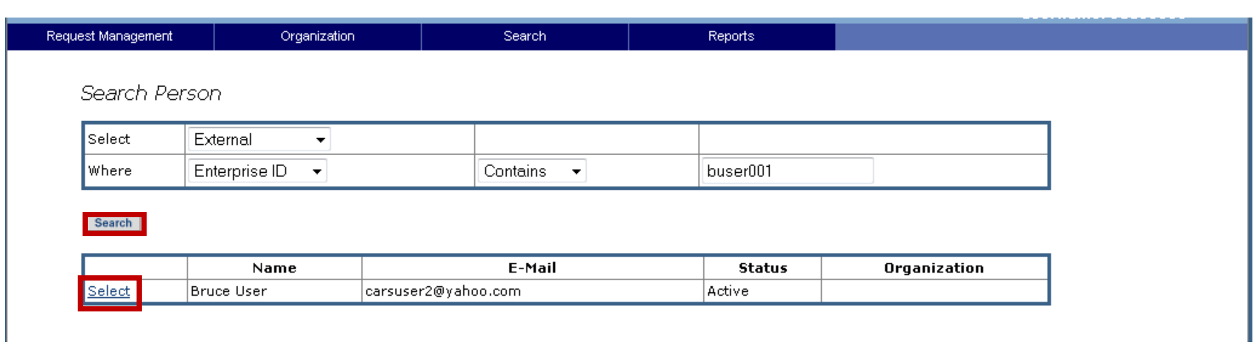
3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).



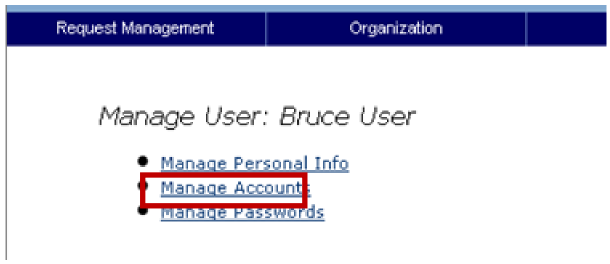
4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).



5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.

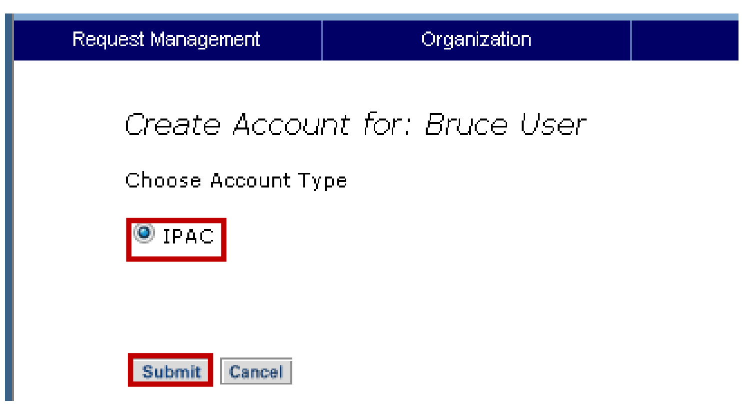


6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.

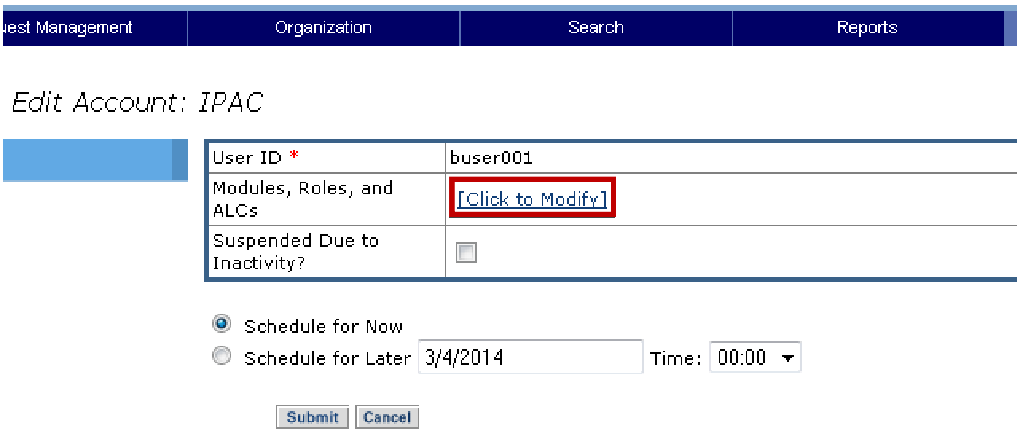


7. When the **Manage Accounts: User Name** page opens, click **New**.

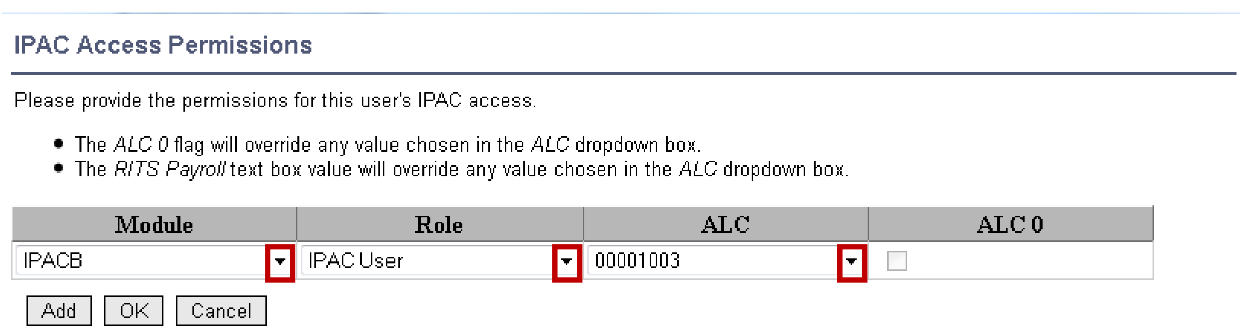
8. When the **Create Account for: User Name** page opens, select **IPAC**, and then click **Submit**.



9. When the **Edit Account: IPAC** page appears, select the **Click to Modify** link in the **Modules, Roles, and ALCs** field.

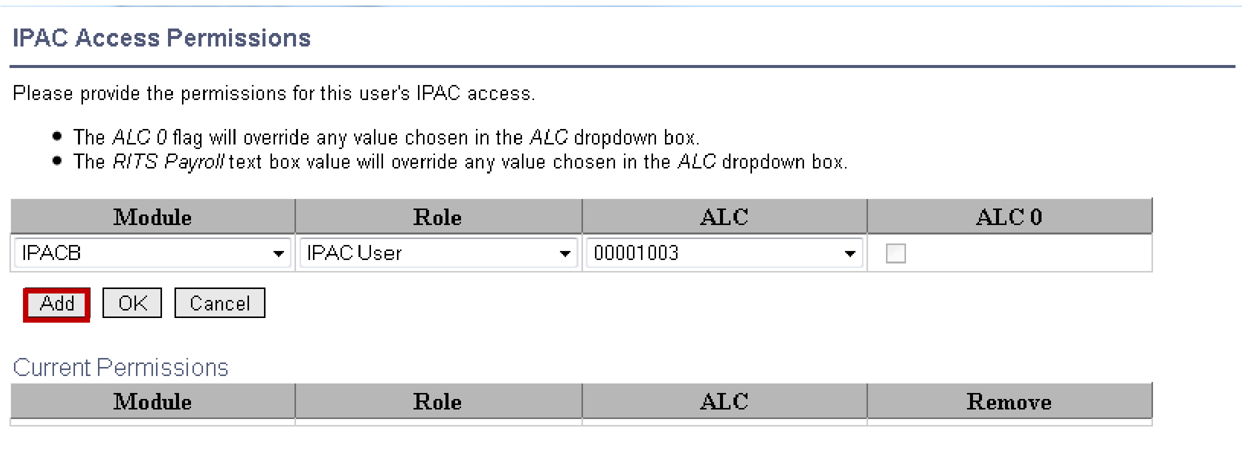


10. When the **IPAC Access Permissions** page opens, navigate through each of the three dropdown menus from left to right to select the appropriate options in the **Module, Role,** and **ALC** fields.

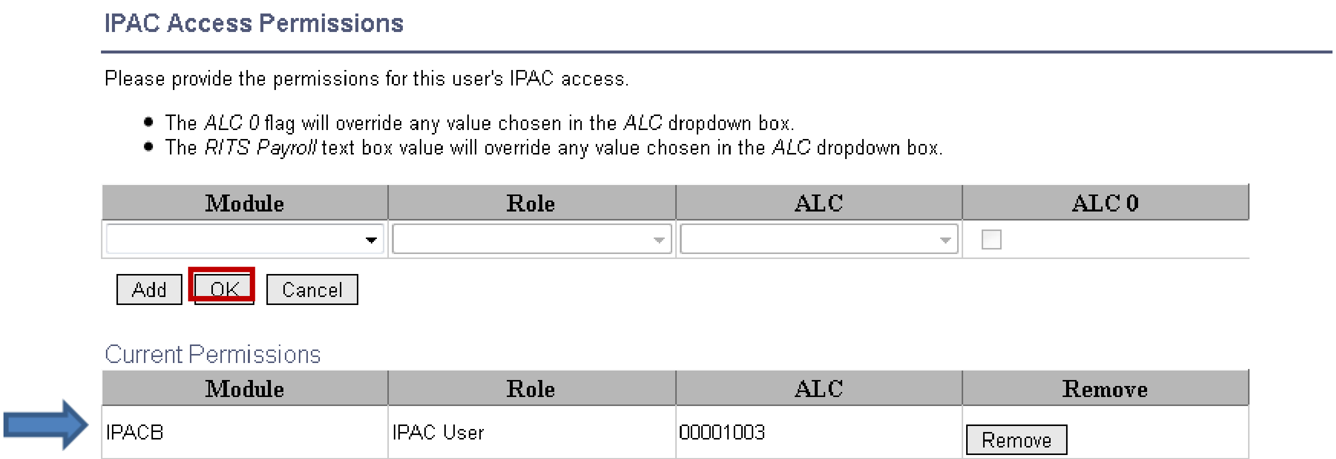


11. After all three fields are populated with your selections, click **Add**. This will add the Module/Role/ALC combination to the ***Current Permissions*** section.

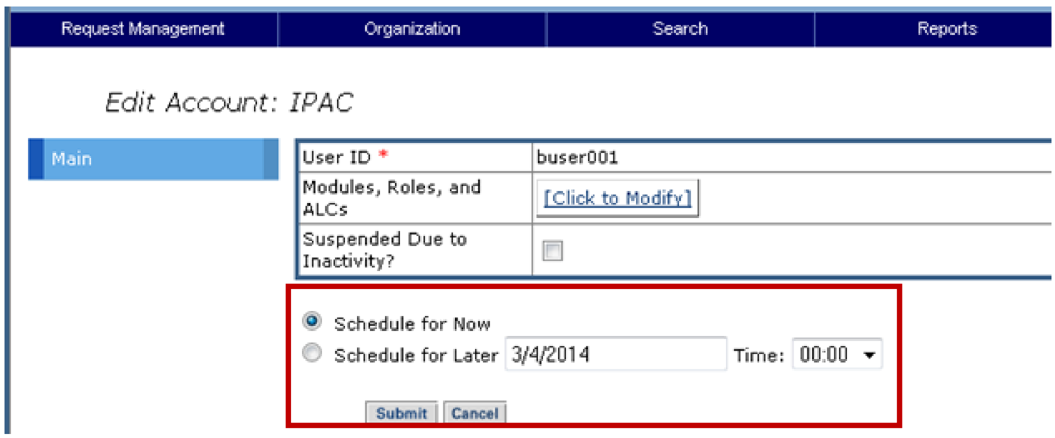
    NOTE: *Only one ALC may be selected per row. To add additional modules/roles for the same or other ALCs, move through steps 10 & 11 as many times as needed. Upon entering each module/role/ALC combination, verify that it appears in its own row under* ***Current Permissions****.*



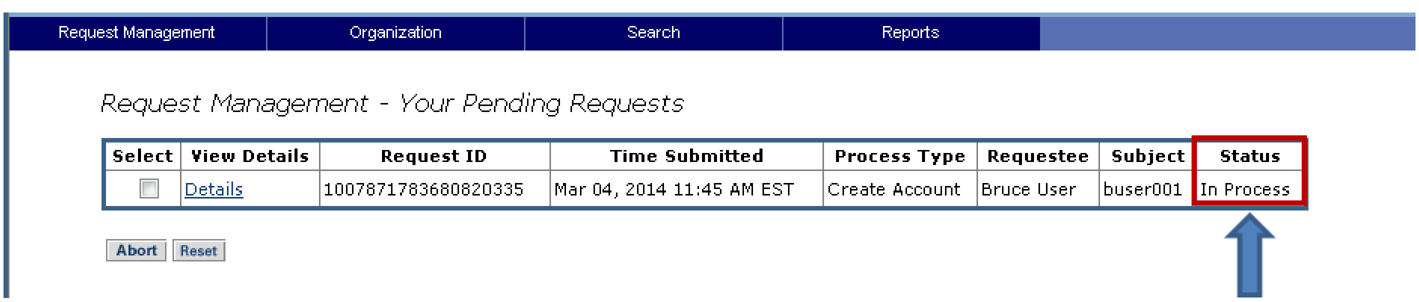
12. When all necessary module/role/ALC combinations appear in the **Current Permissions** section, click **OK**.



13. When the **Edit Account: IPAC** page reappears, click **Submit** to proceed with the default selection of **Schedule for Now**. If the user's access should go into effect at a future point in time, click the radio button to select **Schedule for Later,** enter the desired date and time for access to be provisioned, and then click **Submit**.



14. When the **Request Management – Your Pending Requests** page opens, verify that the submitted request is listed with a status of "In Process." The request has now been sent for approval to any other AAs and the MA for the ALCs requested.



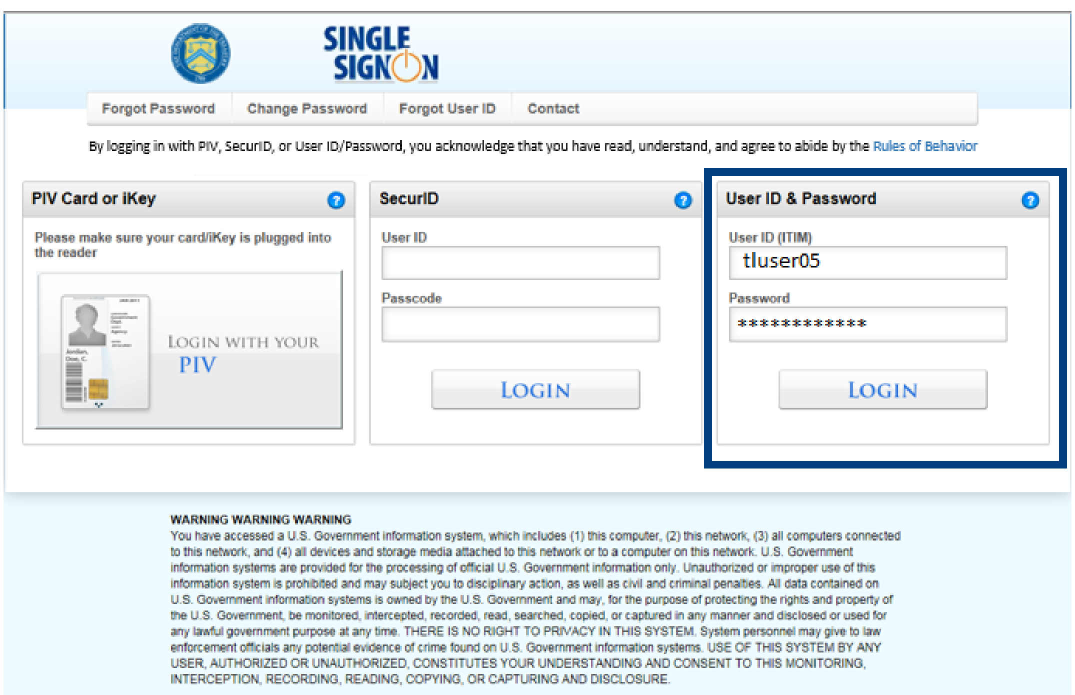
IMPORTANT NOTE: Access and account restore requests are reviewed and approved/rejected on a case-by-case basis according to the ALC selected. Each request is sent to the Agency Administrator(s) and Master Administrator for that ALC. If access requests for multiple ALCs are submitted, a separate access request will be sent to the appropriate AA(s)/MA for each ALC, even if the AA(s)/MA is the same for all ALCs to which access was requested.

Because access to multiple ALCs may be requested within a single submission, it is possible that a specific ALC access request within the submission may have been rejected by the AA(s)/MA for that ALC, even if the submission appears on the **View My Requests** page with a status of "Success." If the user is unable to access IPAC with any module/role/ALC combination(s) requested, it will be necessary to resubmit an access request for the missing module/role/ALC combination(s).

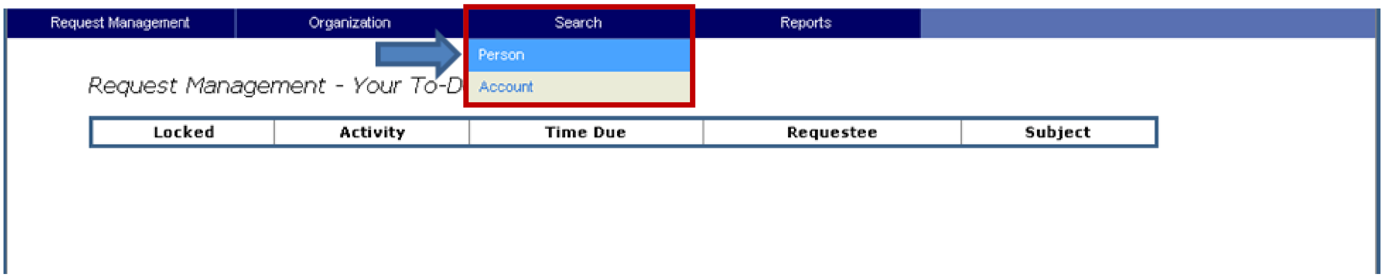
For guidance on access request approvals, please refer to the "Agency Administrator (AA) – Approving an Access or Account Restore Request" or "Master Administrator (MA) – Approving an Access or Account Restore Request" sections of this guide.

Agency Administrator (AA) /Master Administrator (MA) – Suspending a User Account

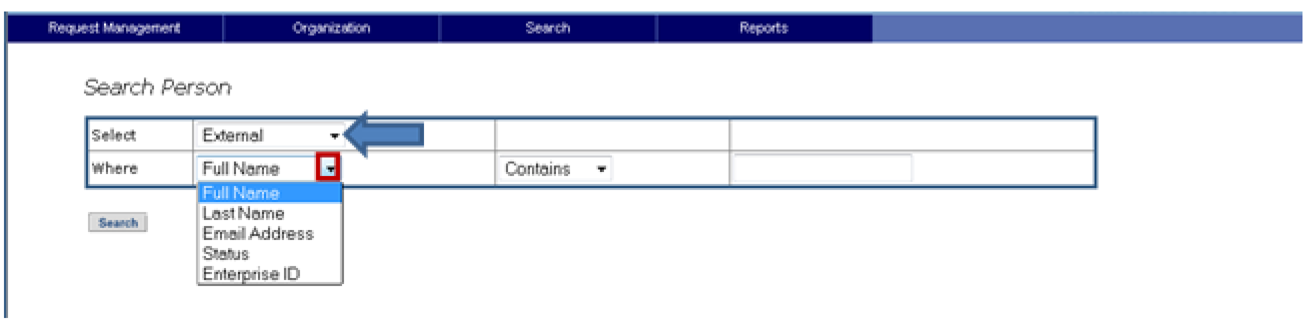
1. Access the **ISIM External Interface page** at https://isim.fiscal.treasury.gov/itimext . Enter your user ID and password, and then click **LOGIN.**



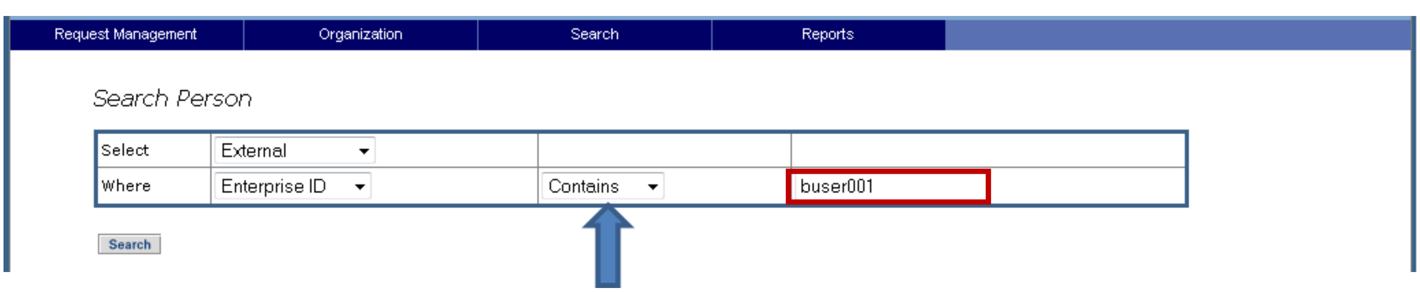
2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.



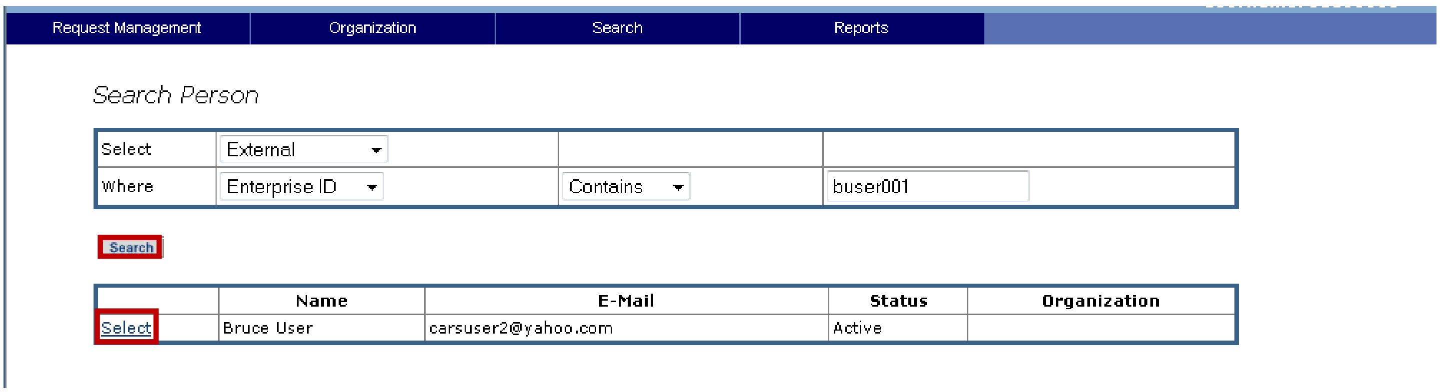
3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).



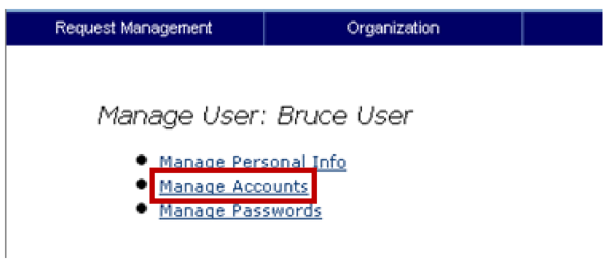
4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).



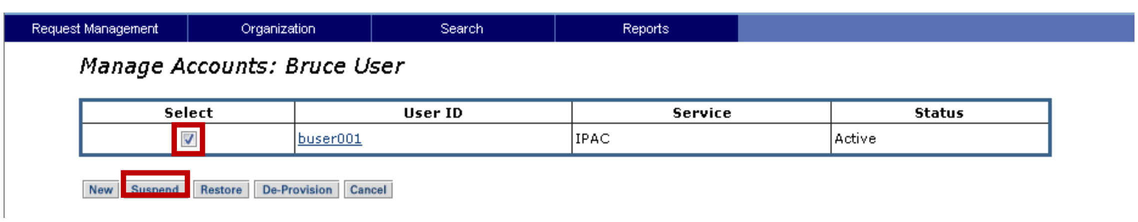
5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.



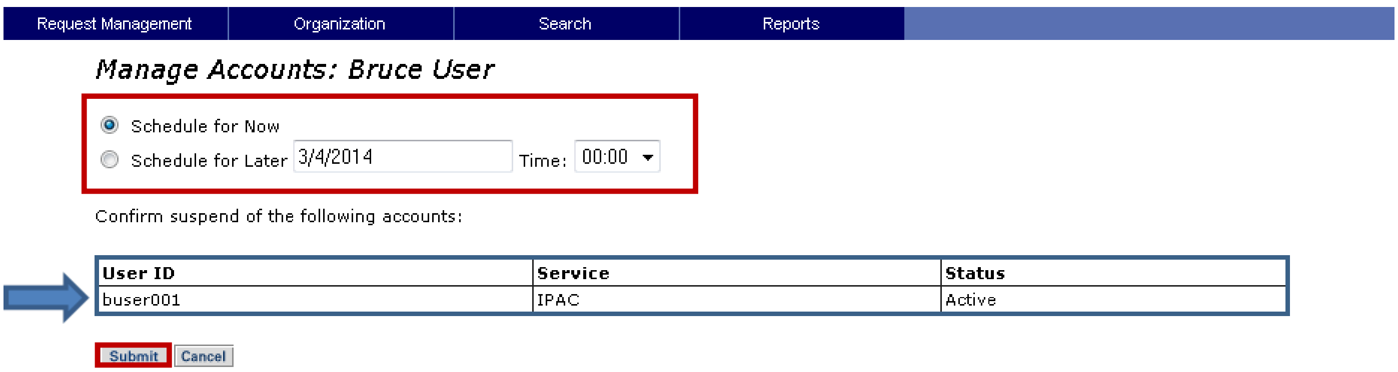
6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.



7. When the **Manage Accounts: User Name** page opens, click the checkbox that corresponds with the user account you wish to suspend, and then click **Suspend**.

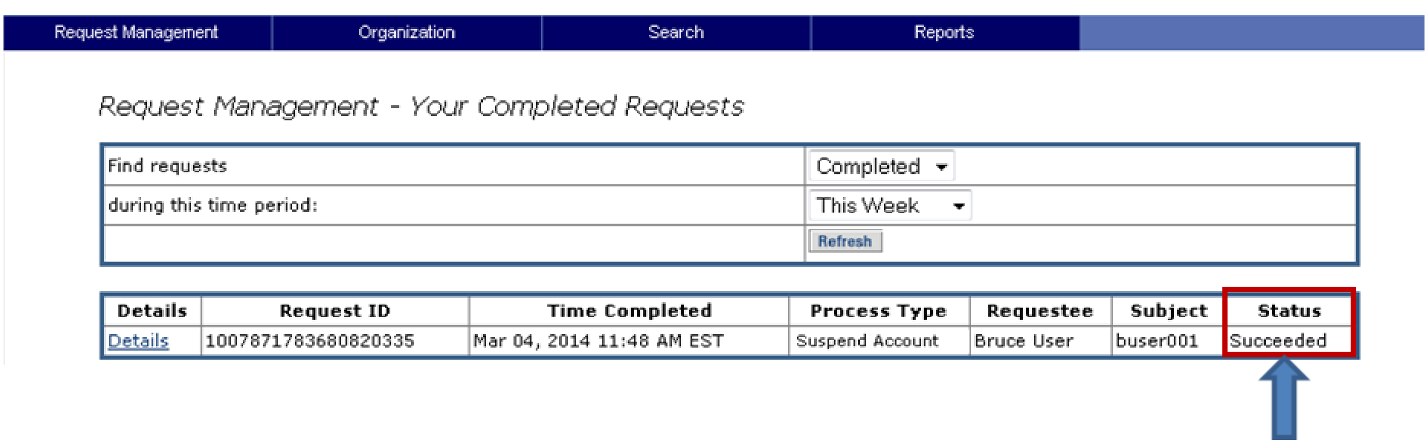


8. Click **Submit** to proceed with the default selection of **Schedule for Now,** which immediately suspends the selected account. If the suspension should go into effect at a future point in time, click the radio button to select **Schedule for Later,** enter the desired date and time for access to be suspended, and then click **Submit**.

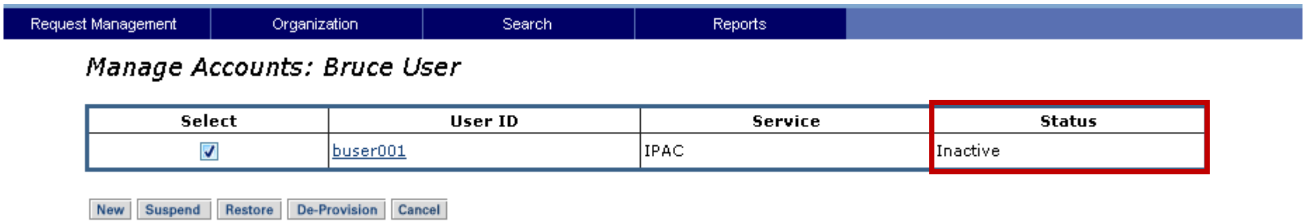


9. When the **Request Management – Your Pending Requests** page opens, click **Request Management** in the blue navigation bar, and then select **View Completed Requests**.

10. When the **Request Management – Your Completed Requests** page opens, verify that the submitted request is listed with a status of "Succeeded."



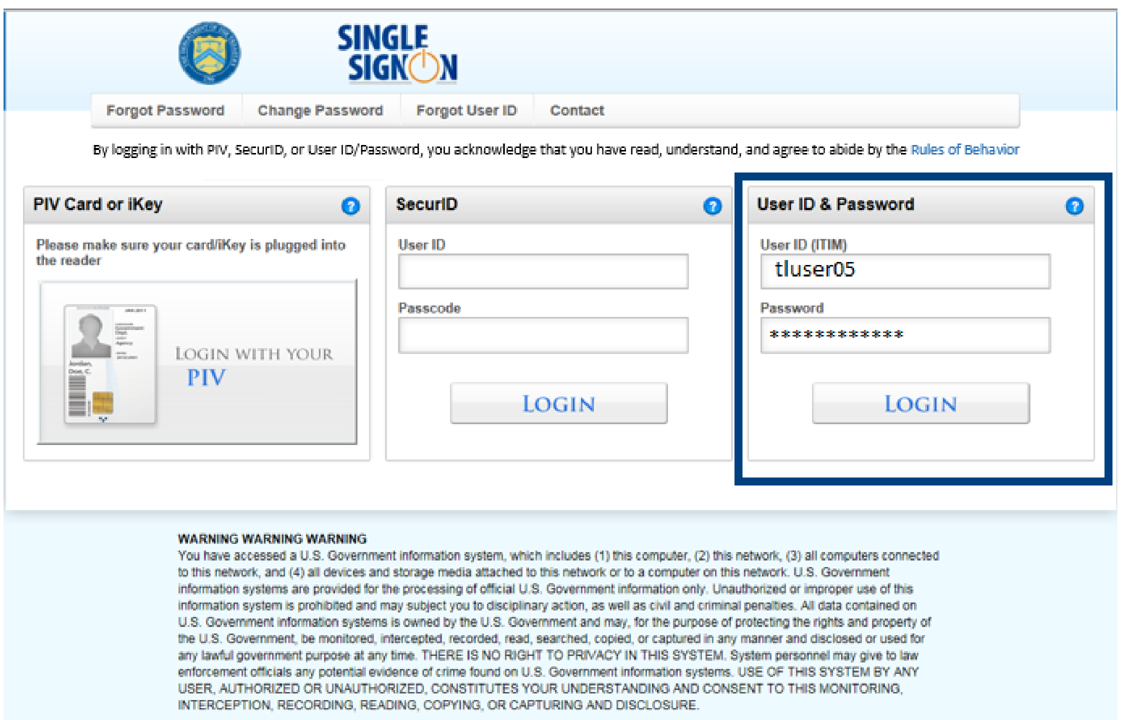
11. **Follow steps 2-6 above to view the users account shows as inactive.**



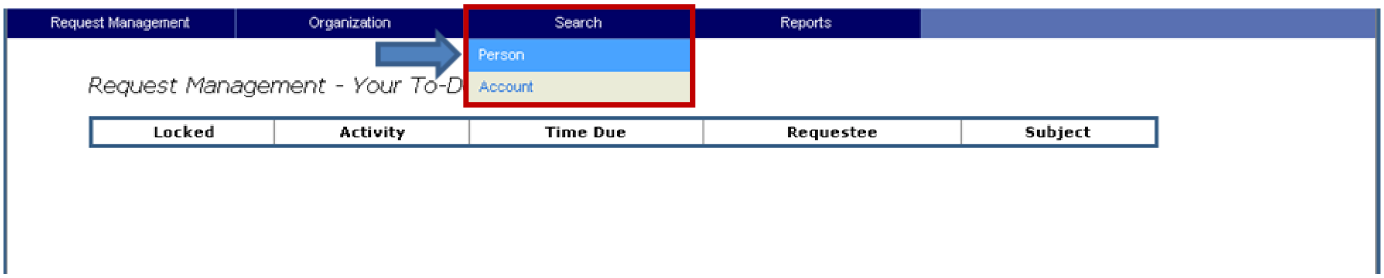
Agency Administrator (AA) – Restoring a User Account

This process requires action by two active ISIM users: an AA, who enters the account restore request, and a second AA or an MA, who then approves it. <u>With the ISIM workflow, an MA does not have the ability to initiate a Create or Restore request on behalf of a user.</u>

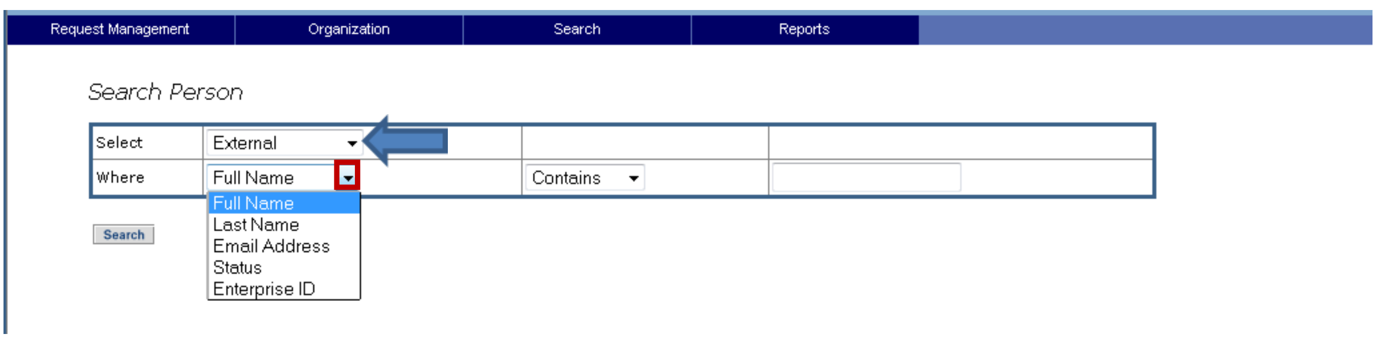
1. Access the **ISIM External Interface page** at https://isim.fiscal.treasury.gov/itimext. Enter your user ID and password, and then click **LOGIN**.



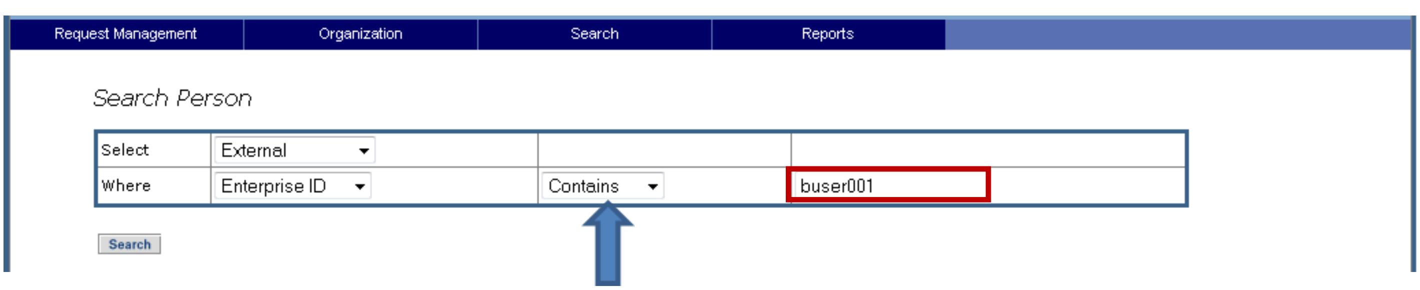
2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.



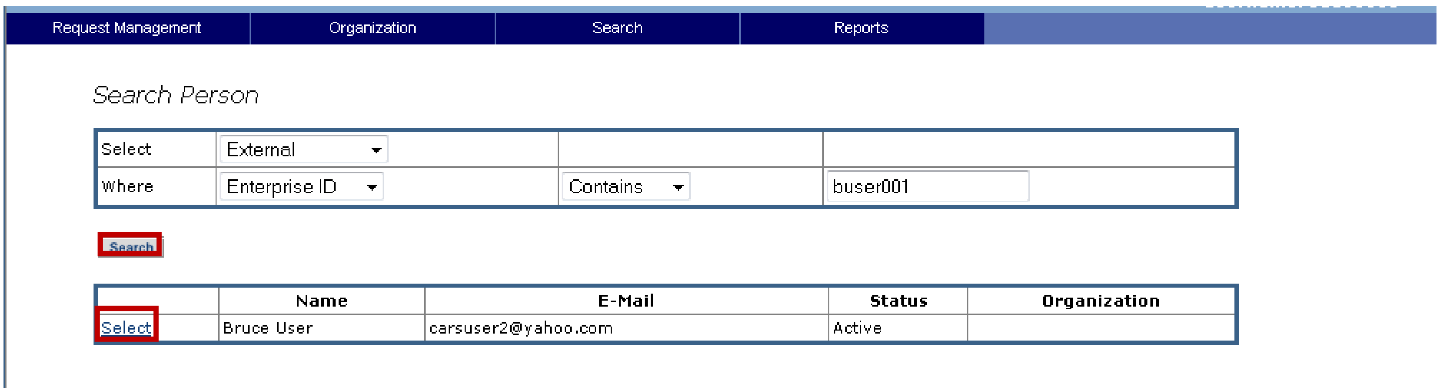
3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).



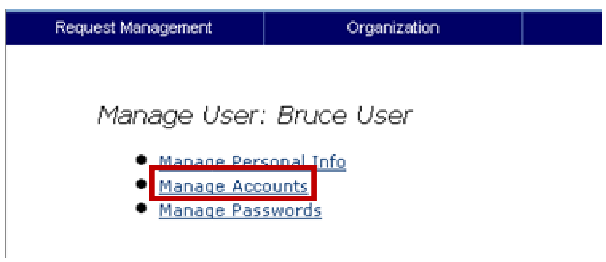
4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).



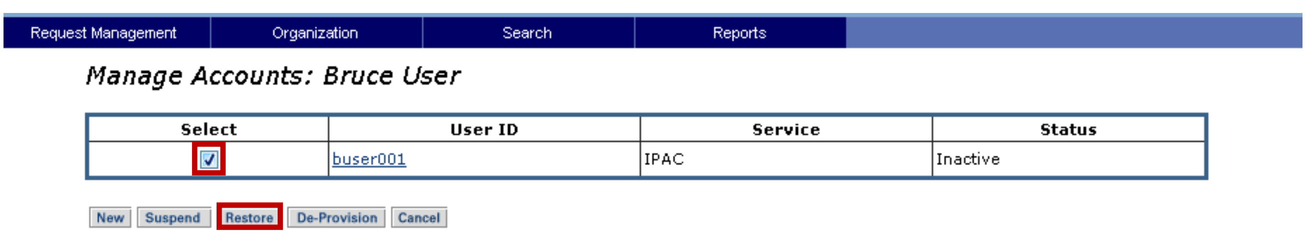
5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.



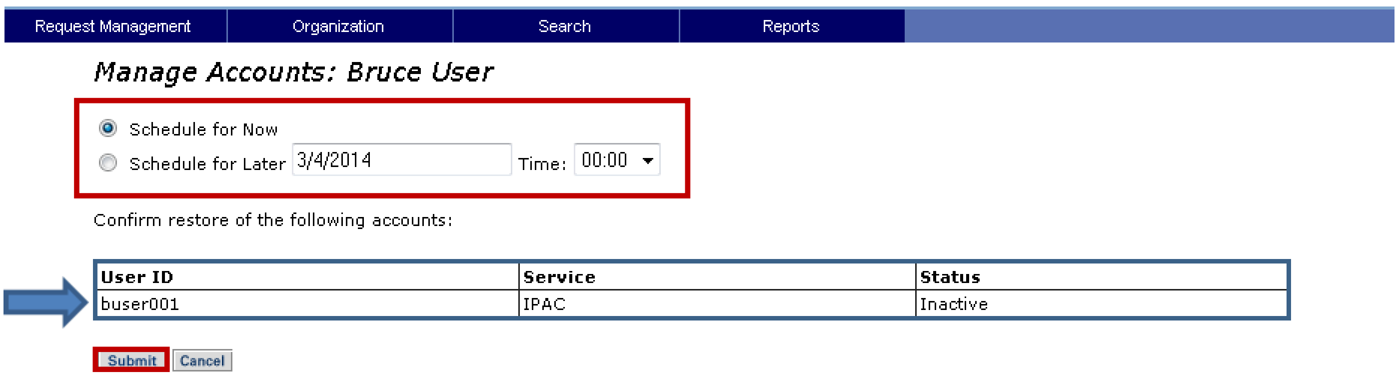
6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.



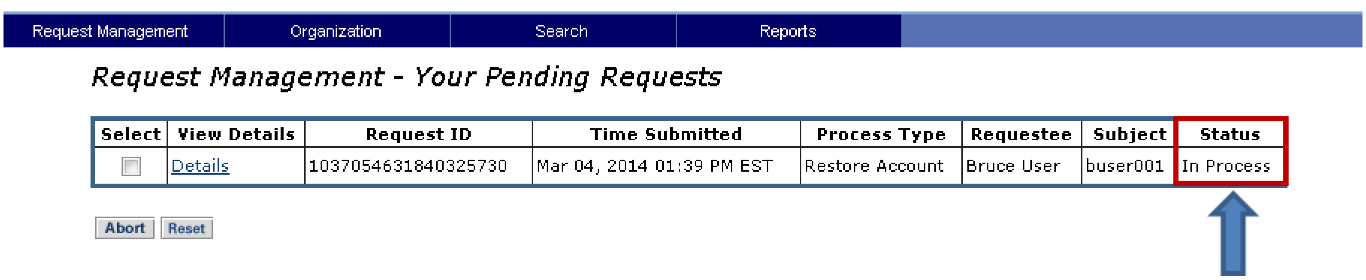
7. When the **Manage Accounts: User Name** page opens, click the checkbox that corresponds with the user account you wish to restore, and then click **Restore**.



8. Click **Submit** to proceed with the default selection of **Schedule for Now,** which will immediately send the account restore request to the second AA/MA for approval. If the account should be restored at a future point in time, click the radio button to select **Schedule for Later,** enter the desired date and time for access to be restored, and then click **Submit**.



9. When the **Request Management – Your Pending Requests** page opens, verify that the submitted request is listed with a status of “In Process.” The request has now been sent for approval to any other AAs and the MA for the ALCs requested.



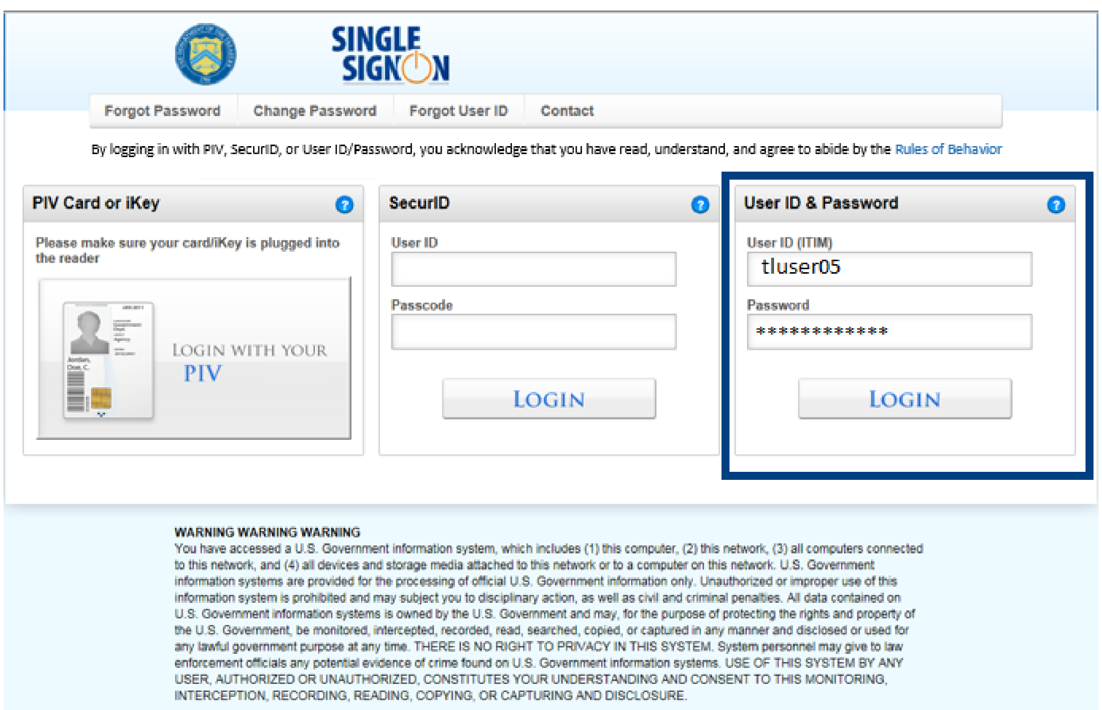
For guidance on account restore request approvals, please refer to the “Agency Administrator (AA) – Approving an Access or Account Restore Request” or “Master Administrator (MA) – Approving an Access or Account Restore Request” sections of this guide.

Agency Administrator (AA)/Master Administrator (MA) – Approving an IPAC Request

All approvals for regular IPAC user modules and roles are routed for approval to both the Agency Administrator(s) and Master Administrators for an ALC. Either the AA or MA must take action on the request within three days of submission or the request will time out and the request will need to be resubmitted. Once the request is approved/rejected, it will disappear from the other approvers To-Do list.

Requests for the Enroll module and the Agency Administrator role will only be routed to the Master Administrator for that ALC for approval. The same three day approval is required for the Agency Administrator role.

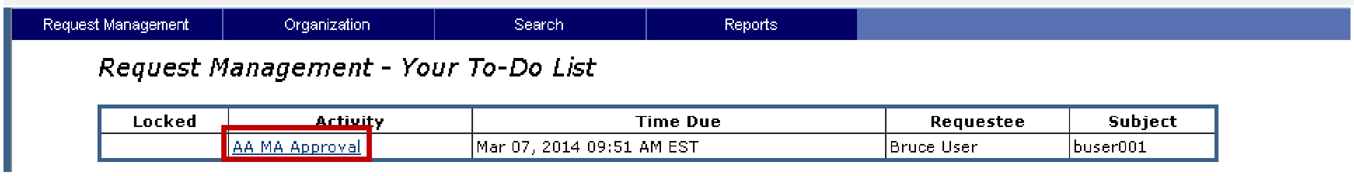
1. Access the **ISIM External Interface website** at https://isim.fiscal.treasury.gov/itimext . Enter your user ID and password, and then click **LOGIN**



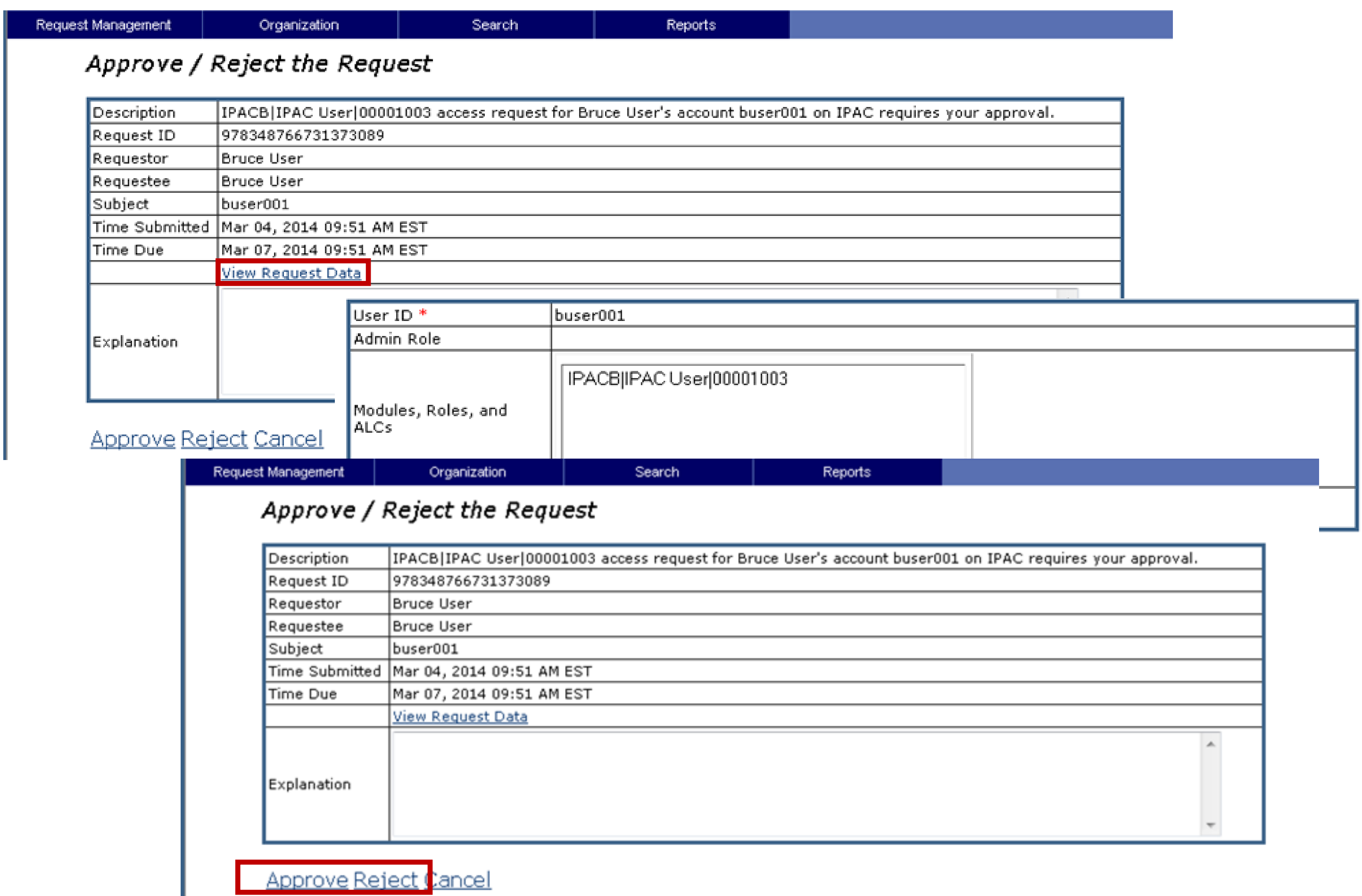
2. When the **Request Management – Your To-Do List** page loads, click the **AA MA Approval** link in the Activity column.

   If you are an AA or MA for multiple ALCs, you will receive a separate request for approval for each module/role/ALC combination the user requested. Users will only be given access to the requests you approve. They will not be able to access IPAC with the module/role/ALC combinations that you reject or do not take action on.

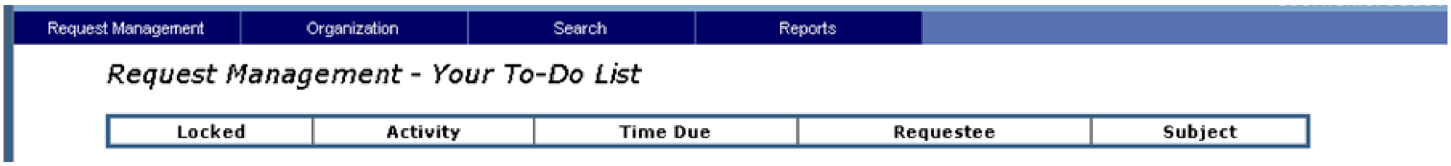
   All approvals must be completed within three days. If no action is taken on a request within 3 days, it will time out and the user will not get access to the module/role/ALC combinations requested.



3. When the **Approve/Reject the Request** page opens, click **View Request Data** to access additional request details, and then click **Back** to return to the **Approve/Reject** screen.



5. On the **Request Management – Your To-Do List** page, verify that the approved request no longer appears and whether there are other requests that need action.



Contact the Treasury Support Center at (877) 440-9476 or via email at IPAC@stls.frb.org
if you have questions concerning the IPAC enrollment process.