



Intra-Governmental Payment and Collection (IPAC)

AA and MA Provisioning Guide

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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. With the ISIM workflow, an MA does not have the ability to initiate a request on behalf of a user.

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

SINGLE SIGN ON

Forgot Password Change Password Forgot User ID Contact

By logging in with PIV, SecurID, or User ID/Password, you acknowledge that you have read, understand, and agree to abide by the Rules of Behavior

PIV Card or iKey

Please make sure your card/iKey is plugged into the reader

SecurID

User ID
Passcode

User ID & Password

User ID (ITIM)
tluser05

Password

LOGIN

WARNING WARNING WARNING

You have accessed a U.S. Government information system, which includes (1) this computer, (2) this network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. U.S. Government information systems are provided for the processing of official U.S. Government information only. Unauthorized or improper use of this information system is prohibited and may subject you to disciplinary action, as well as civil and criminal penalties. All data contained on U.S. Government information systems is owned by the U.S. Government and may, for the purpose of protecting the rights and property of the U.S. Government, be monitored, intercepted, recorded, read, searched, copied, or captured in any manner and disclosed or used for any lawful government purpose at any time. THERE IS NO RIGHT TO PRIVACY IN THIS SYSTEM. System personnel may give to law enforcement officials any potential evidence of crime found on U.S. Government information systems. USE OF THIS SYSTEM BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES YOUR UNDERSTANDING AND CONSENT TO THIS MONITORING, INTERCEPTION, RECORDING, READING, COPYING, OR CAPTURING AND DISCLOSURE.

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

Request Management Organization Search Reports

Request Management - Your To-Do List

Person
Account

Locked	Activity	Time Due	Requestee	Subject
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- 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).

The screenshot shows the 'Search Person' interface with a navigation bar containing 'Request Management', 'Organization', 'Search', and 'Reports'. The 'Search Person' form has two rows: 'Select' and 'Where'. The 'Select' dropdown is set to 'External'. The 'Where' dropdown is open, showing options: 'Full Name', 'Last Name', 'Email Address', 'Status', and 'Enterprise ID'. A blue arrow points to the 'Full Name' option. The 'Where' field also includes a 'Contains' dropdown and a text input field.

- 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).

The screenshot shows the 'Search Person' interface. The 'Where' dropdown is now set to 'Enterprise ID'. The text input field in the 'Where' row contains 'buser001', which is highlighted with a red box. A blue arrow points to the text input field. The 'Search' button is visible below the form.

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

The screenshot shows the 'Search Person' interface after a search. The 'Search' button is highlighted with a red box. Below it, a table displays search results. The first row is highlighted with a red box, and a 'Select' link is visible in the first column of that row.

	Name	E-Mail	Status	Organization
Select	Bruce User	carsuser2@yahoo.com	Active	



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

Request Management Organization

Manage User: Bruce User

- [Manage Personal Info](#)
- [Manage Account](#)
- [Manage Passwords](#)

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

Request Management Organization Search Reports

Manage Accounts: Bruce User

Select	User ID	Service	Status
--------	---------	---------	--------

[New](#) [Suspend](#) [Restore](#) [De-Provision](#) [Cancel](#)

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

Request Management Organization

Create Account for: Bruce User

Choose Account Type

IPAC

[Submit](#) [Cancel](#)



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

Test Management	Organization	Search	Reports
-----------------	--------------	--------	---------

Edit Account: IPAC

User ID *	buser001
Modules, Roles, and ALCs	[Click to Modify]
Suspended Due to Inactivity?	<input type="checkbox"/>

Schedule for Now
 Schedule for Later 3/4/2014 Time: 00:00

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.

IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The *ALC 0* flag will override any value chosen in the *ALC* dropdown box.
- The *RITS Payroll* text box value will override any value chosen in the *ALC* dropdown box.

Module	Role	ALC	ALC 0
IPACB	IPAC User	00001003	<input type="checkbox"/>



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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**.

IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The *ALC 0* flag will override any value chosen in the *ALC* dropdown box.
- The *RITS Payroll* text box value will override any value chosen in the *ALC* dropdown box.

Module	Role	ALC	ALC 0
IPACB	IPAC User	00001003	<input type="checkbox"/>

Add

Current Permissions

Module	Role	ALC	Remove
--------	------	-----	--------

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

IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The *ALC 0* flag will override any value chosen in the *ALC* dropdown box.
- The *RITS Payroll* text box value will override any value chosen in the *ALC* dropdown box.

Module	Role	ALC	ALC 0
			<input type="checkbox"/>

OK

Current Permissions

Module	Role	ALC	Remove
IPACB	IPAC User	00001003	<input type="button" value="Remove"/>





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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**.

Edit Account: IPAC

Main

User ID * buser001

Modules, Roles, and ALCs [\[Click to Modify\]](#)

Suspended Due to Inactivity?

Schedule for Now

Schedule for Later 3/4/2014 Time: 00:00

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.

Request Management - Your Pending Requests

Select	View Details	Request ID	Time Submitted	Process Type	Requestee	Subject	Status
<input type="checkbox"/>	Details	1007871783680820335	Mar 04, 2014 11:45 AM EST	Create Account	Bruce User	buser001	In Process



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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**.

SINGLE SIGN ON

Forgot Password Change Password Forgot User ID Contact

By logging in with PIV, SecurID, or User ID/Password, you acknowledge that you have read, understand, and agree to abide by the Rules of Behavior

PIV Card or iKey

Please make sure your card/iKey is plugged into the reader

SecurID

User ID

Passcode

User ID & Password

User ID (ITIM)

tuser05

Password

WARNING WARNING WARNING

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

Request Management	Organization	Search	Reports	
Request Management - Your To-Do List				
Locked	Activity	Time Due	Requestee	Subject

- 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).

Request Management	Organization	Search	Reports
Search Person			
Select	External		
Where	Full Name	Contains	
Search			

- 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).

Request Management	Organization	Search	Reports
Search Person			
Select	External		
Where	Enterprise ID	Contains	buser001
Search			



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

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

Search Person

Select	External		
Where	Enterprise ID	Contains	buser001

Search

	Name	E-Mail	Status	Organization
Select	Bruce User	carsuser2@yahoo.com	Active	

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

Request Management	Organization
--------------------	--------------

Manage User: Bruce User

- [Manage Personal Info](#)
- **[Manage Accounts](#)**
- [Manage Passwords](#)

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**.

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

Manage Accounts: Bruce User

Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Active

New **Suspend** **Restore** **De-Provision** **Cancel**



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- 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**.

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

Manage Accounts: Bruce User

Schedule for Now
 Schedule for Later: Time:

Confirm suspend of the following accounts:

User ID	Service	Status
buser001	IPAC	Active

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

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

Request Management - Your Pending Requests

Request ID	Time Submitted	Process Type	Requestee	Subject	Status
------------	----------------	--------------	-----------	---------	--------

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

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

Request Management - Your Completed Requests

Find requests:

during this time period:

Details	Request ID	Time Completed	Process Type	Requestee	Subject	Status
Details	1007871783680820335	Mar 04, 2014 11:48 AM EST	Suspend Account	Bruce User	buser001	Succeeded



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

Request Management	Organization	Search	Reports
Manage Accounts: Bruce User			
Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Inactive
<input type="button" value="New"/> <input type="button" value="Suspend"/> <input type="button" value="Restore"/> <input type="button" value="De-Provision"/> <input type="button" value="Cancel"/>			

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. With the ISIM workflow, an MA does not have the ability to initiate a Create or Restore request on behalf of a user.

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

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

Request Management	Organization	Search	Reports	
Request Management - Your To-Do List				
Locked	Activity	Time Due	Requestee	Subject

- 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).

Request Management	Organization	Search	Reports
Search Person			
Select	External		
Where	Full Name	Contains	
<input type="button" value="Search"/>			

- 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).

Request Management	Organization	Search	Reports
Search Person			
Select	External		
Where	Enterprise ID	Contains	buser001
<input type="button" value="Search"/>			



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

Request Management	Organization	Search	Reports	
<i>Search Person</i>				
Select	External			
Where	Enterprise ID	Contains	buser001	
<input type="button" value="Search"/>				
<input type="button" value="Select"/>	Name	E-Mail	Status	Organization
	Bruce User	carsuser2@yahoo.com	Active	

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

Request Management	Organization
<i>Manage User: Bruce User</i>	
<ul style="list-style-type: none">• Manage Personal Info• <input type="button" value="Manage Accounts"/>• Manage Passwords	

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**.

Request Management	Organization	Search	Reports
<i>Manage Accounts: Bruce User</i>			
Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Inactive
<input type="button" value="New"/> <input type="button" value="Suspend"/> <input type="button" value="Restore"/> <input type="button" value="De-Provision"/> <input type="button" value="Cancel"/>			



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- 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**.

Request Management Organization Search Reports

Manage Accounts: Bruce User

Schedule for Now
 Schedule for Later Time:

Confirm restore of the following accounts:

User ID	Service	Status
buser001	IPAC	Inactive

- 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.

Request Management Organization Search Reports

Request Management - Your Pending Requests

Select	View Details	Request ID	Time Submitted	Process Type	Requestee	Subject	Status
<input type="checkbox"/>	Details	1037054631840325730	Mar 04, 2014 01:39 PM EST	Restore Account	Bruce User	buser001	In Process

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.



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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.

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- 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.

Request Management	Organization	Search	Reports	
Request Management - Your To-Do List				
Locked	Activity	Time Due	Requestee	Subject
	AA MA Approval	Mar 07, 2014 09:51 AM EST	Bruce User	buser001

- 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.

Request Management	Organization	Search	Reports						
Approve / Reject the Request									
Description	IPACB IPAC User 00001003 access request for Bruce User's account buser001 on IPAC requires your approval.								
Request ID	978348766731373089								
Requestor	Bruce User								
Requestee	Bruce User								
Subject	buser001								
Time Submitted	Mar 04, 2014 09:51 AM EST								
Time Due	Mar 07, 2014 09:51 AM EST								
	View Request Data								
Explanation	<table border="1"><tr><td>User ID *</td><td>buser001</td></tr><tr><td>Admin Role</td><td></td></tr><tr><td>Modules, Roles, and ALCs</td><td>IPACB IPAC User 00001003</td></tr></table>			User ID *	buser001	Admin Role		Modules, Roles, and ALCs	IPACB IPAC User 00001003
User ID *	buser001								
Admin Role									
Modules, Roles, and ALCs	IPACB IPAC User 00001003								
Approve Reject Cancel									

Request Management	Organization	Search	Reports
Approve / Reject the Request			
Description	IPACB IPAC User 00001003 access request for Bruce User's account buser001 on IPAC requires your approval.		
Request ID	978348766731373089		
Requestor	Bruce User		
Requestee	Bruce User		
Subject	buser001		
Time Submitted	Mar 04, 2014 09:51 AM EST		
Time Due	Mar 07, 2014 09:51 AM EST		
	View Request Data		
Explanation			
Approve Reject Cancel			



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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.

Request Management	Organization	Search	Reports	
<i>Request Management - Your To-Do List</i>				
Locked	Activity	Time Due	Requestee	Subject

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.