



New User Access

The term “new user” refers to an individual who does not currently have access to the Government Wide Treasury Account Symbol (GTAS) application.

1. New users will access SailPoint IIQ. <https://iiq.fiscal.treasury.gov> to create their identity.

New users are required to logon via their PIV/CAC credentials or choose one of the 3rd party credential service providers, ID.me or LOGIN.gov.

Note: Users choosing 3rd party CSP’s who have existing personal accounts with ID.me or LOGIN.gov accounts must access their ID.me or LOGIN.gov accounts and add their work email address to their profiles. ID.me will require the work email to be the primary email address.

An official website of the United States government [Here's how you know](#) ▾



 PIV / CAC





Authenticate using PIV, PIV-I, CAC, Yubikey

Certificate Authentication enables U.S. Federal employees and contractors to authenticate using a federally provided credential (PIV, PIV-I, CAC, Yubikey)



2. The new user will be prompted to enter their email address. **The new user must enter their work email address.**

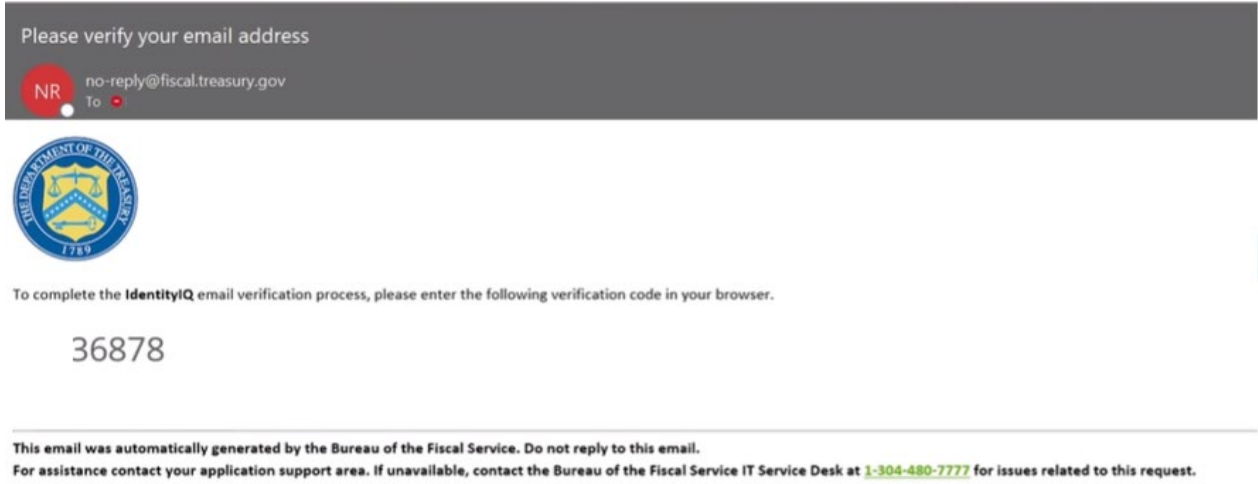
This screenshot shows the registration step where a user enters their email address. At the top, there is a header with the US flag and the text "An official website of the United States government" followed by a link "Here's how you know" and a dropdown arrow. Below this is the "SailPoint Identity IQ" logo. A light blue banner contains the instruction: "If the e-mail address below is not correct, please specify the correct e-mail address and click Submit." Below the banner, a message states: "An email (from: no-reply@fiscal.treasury.gov) will be sent to this email address containing a verification code. This code is required on the next screen to verify possession of your email address." The main form area has a text input field containing "user@agencyemail.gov", which is highlighted with a red rectangular box. To the right of the input field is a blue "Submit" button.

3. The user will be emailed a code to verify their email address. When the email is received, the user enters the code on the screen. The email will be sent from no-reply@fiscal.treasury.gov

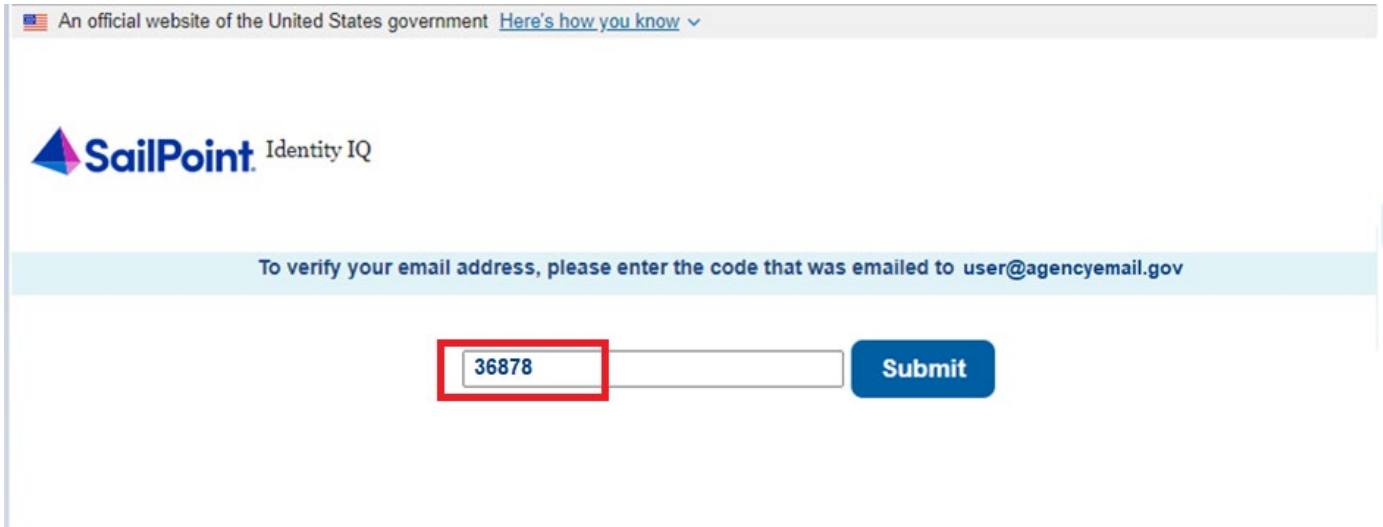
This screenshot shows the verification step where a user enters a code received via email. It features the same header as the previous screenshot. Below the header is the "SailPoint Identity IQ" logo. A light blue banner contains the instruction: "To verify your email address, please enter the code that was emailed to user@agencyemail.gov". Below the banner, there is a text input field with the placeholder text "Enter email verification code" and a blue "Submit" button to its right.



4. Example of email.

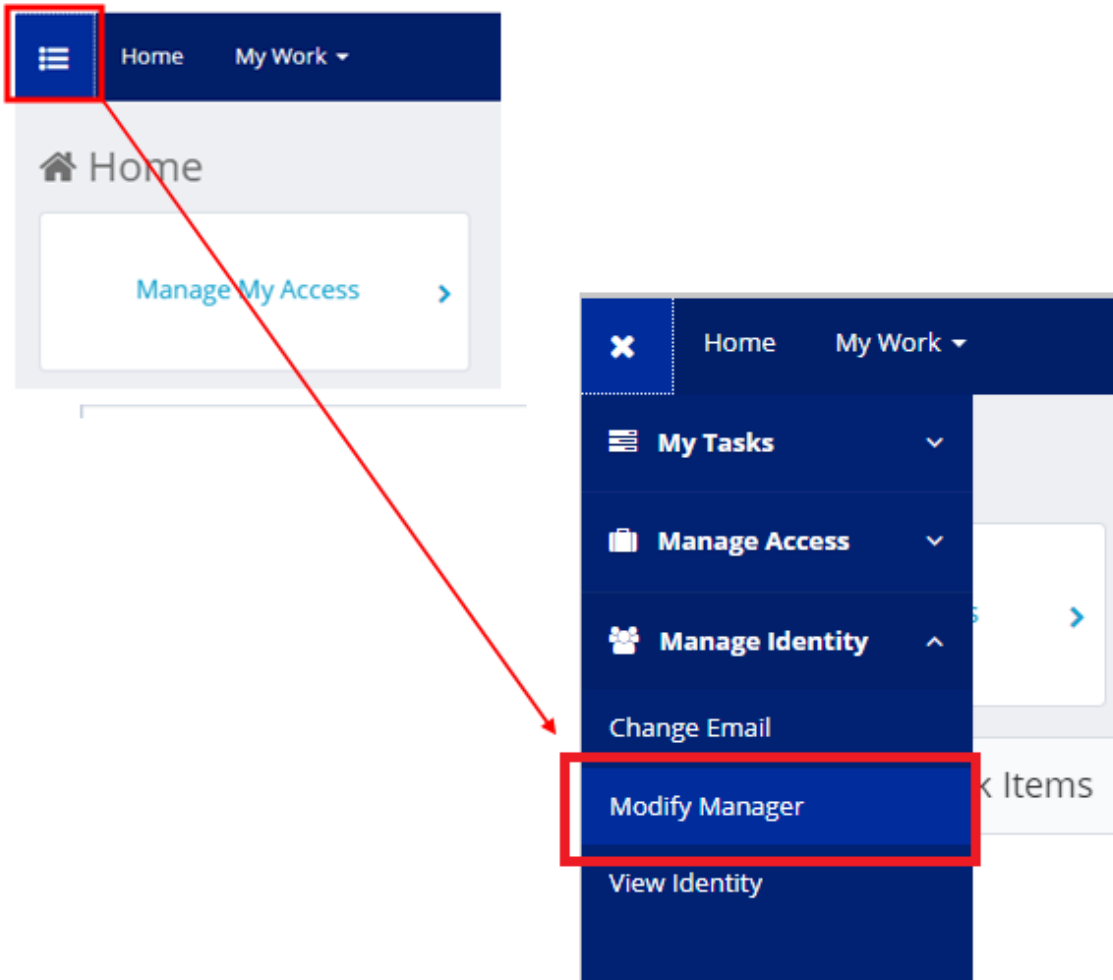


5. User enters the code, clicks **Submit**.





6. Users must select a Manager to approve their access. The Manager should be someone within your Agency appropriate to review/approve your access request and will also recertify your application access annually. User selects the 3 lines to the left of the Home button, then selects **Modify Manager**.





7. Click the radial button next to Set/Modify the Manager for your account. Click **Next**.

Modify Manager Option List

Instructions
Please select one option from the list below. If you wish to leave, please hit the Cancel button.

Modify Manager Option List
Select Operation *

Set/Modify the Manager for your Account

8. Input the email address of the Manager. Click **Next**.

Set Manager Option List

Instructions
Please select one option from the list below. If you wish to leave, please hit the Cancel button.

Current Manager
Current Manager
No Valid Manager Set

Set Manager Option List
Manager's Email Address *



9. Confirm Selected Manager will display. Confirm the email address for accuracy. Click **Next**.

Confirm Selected Manager

Instructions

Please confirm the manager email selected below.
 If you wish to change the manager selected, please hit the Back button.
 If you wish to leave, please hit the Cancel button.
 Otherwise, hit Submit and your request will be submitted.
 Please note, that the manager will need to approve the action before they are assigned; therefore, there may be a delay before the manager appears on your identity.

Selected Manager

Selected Manager

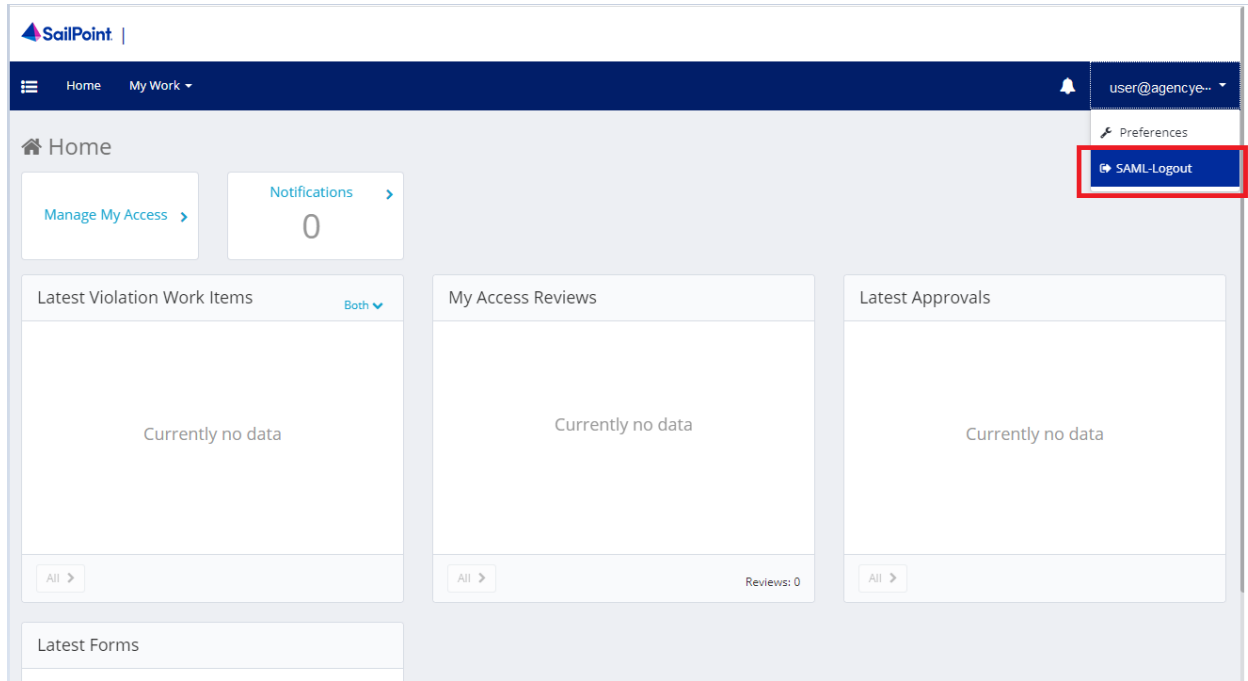
manager@agency.gov

10. A request confirmation message will display. The selected Manager will receive an auto-generated email indicating the request is awaiting their action.

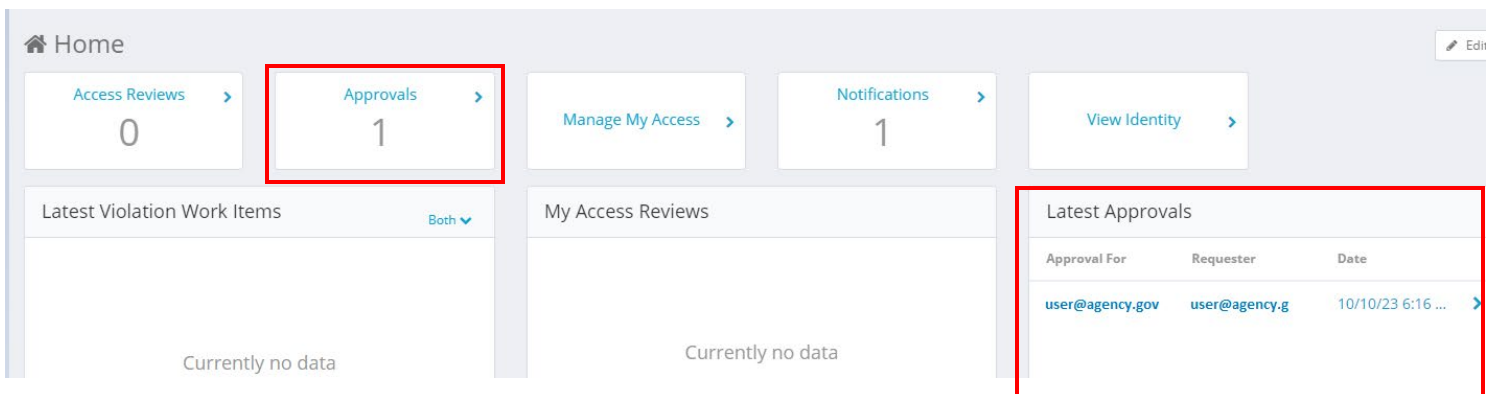
Request made to set manager for af831075-2872-41db-bfd6-8f97a539f96a to , manager@agency.gov



11. Users will receive an auto-generated email when the Manager has acted on the pending request to be designated. Users must wait until the Manager has approved before requesting access. Click **SAML-Logout**.



12. The Manager will logon to SailPoint IIQ. <https://iiq.fiscal.treasury.gov>. The pending approval will be listed under Approvals or Latest Approvals.





13. The Identity Approval will display. The User information will display at the top. The Manager information will display below. The Manager may input comments, then selects the **Approve** or **Deny** button.

Approvals 1

Sort By Filter Collapse All Search Work Item ID or Requestee N

Identity Approval - Account Changes for User: user@agency.gov | 1 Request

Requested on: Oct 10, 2023 6:16:53 PM Requested by: user@agency.gov Work Item ID: 6881

Approve All Deny All View Form Info Comments Menu

Modify: manager (Manager) = 'manager@agency.gov'

Info Comments Approve Deny

Application: IdentityIQ Account: af831075-2872-41db-bfd6-8f97a539f96a

Show Showing 1-1 of 1

14. The Complete Approval button will display. Click **Complete**.

Complete Approval

You have completed all items in this approval. Click **Complete** to complete the approval or **Cancel** to change your decisions.

Requested by: Woodrow.Sauer@caiatest.gov Work Item ID: 6881



15. The User logs back into SailPoint Identity IQ. <https://iiq.fiscal.treasury.gov>

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PIV / CAC

ID.me

LOGIN.GOV

Authenticate using PIV, PIV-I, CAC, Yubikey

Certificate Authentication enables U.S. Federal employees and contractors to authenticate using a federally provided credential (PIV, PIV-I, CAC, Yubikey)

16. The User clicks **Manage My Access**.

Note: Users who are also a Manager in IIQ, will see a Manager User Access tile to select. Managers will also need to set a Manager for their account before requesting user access. Managers will see their name listed to select themselves, then see the Add Access and Remove Access tabs.

Home Edit

Manage My Access >

Notifications >
0

View Identity >

Latest Violation Work Items Both ▾

Currently no data

All >

My Access Reviews

Currently no data

All >

Latest Approvals

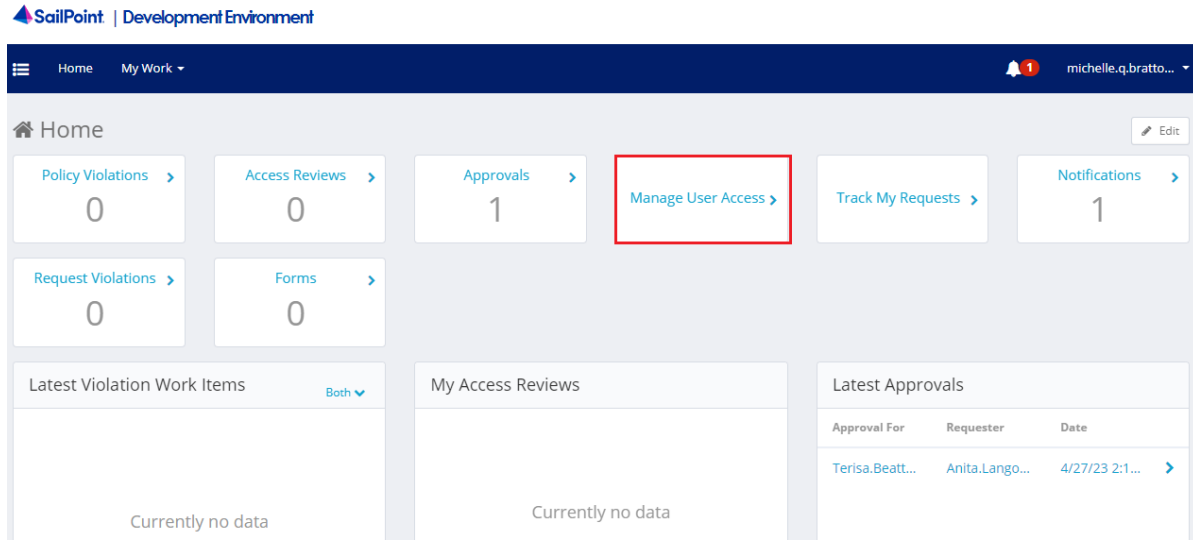
Currently no data

All >

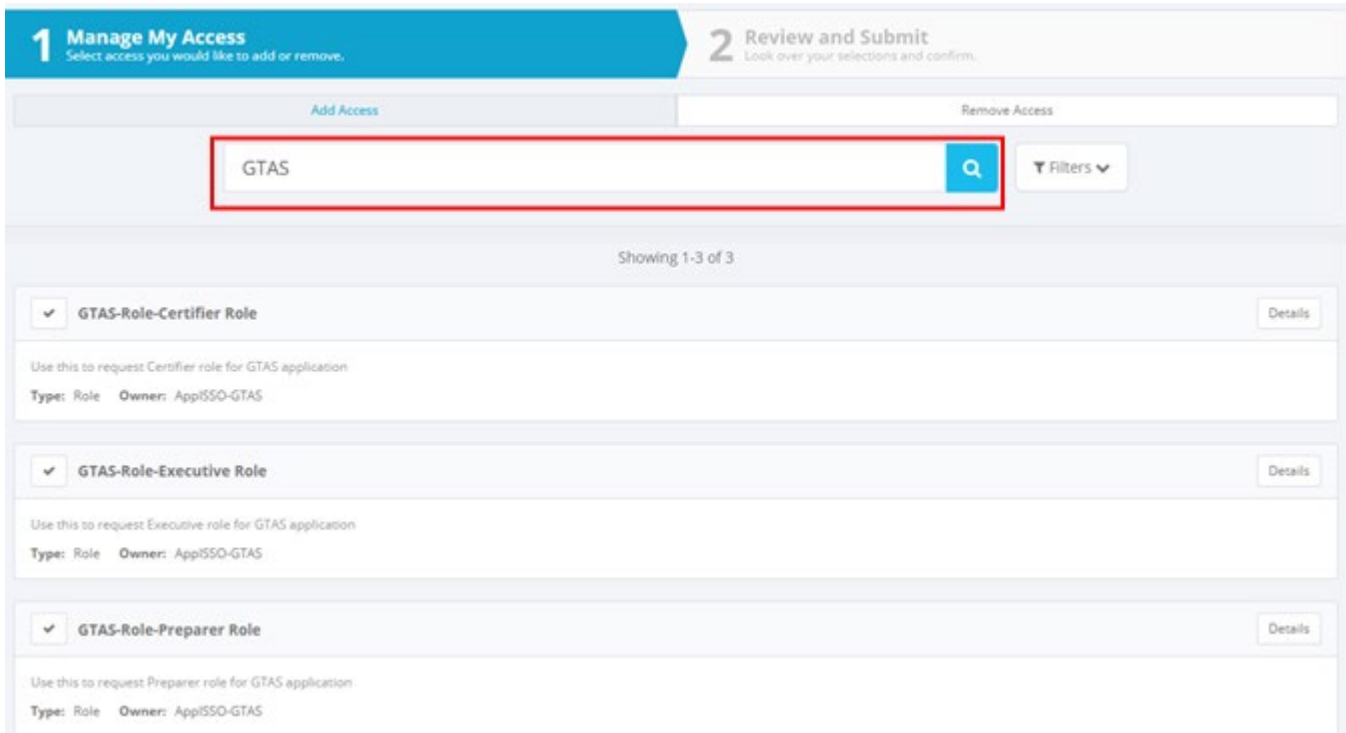
Reviews: 0



17. Example of Manager homepage in SailPoint IIQ. Click **Manage User Access**.



18. The Add Access screen will display. Enter **GTAS** into the search field and click the magnify icon. The GTAS roles will display. For a complete definition of the GTAS roles, see Appendix A.





18. Select only 1 GTAS role. Click **Next**.

Manage My Access Help

1 Manage My Access Select access you would like to add or remove. **2 Review and Submit** Look over your selections and confirm. 1

Add Access 1 Remove Access

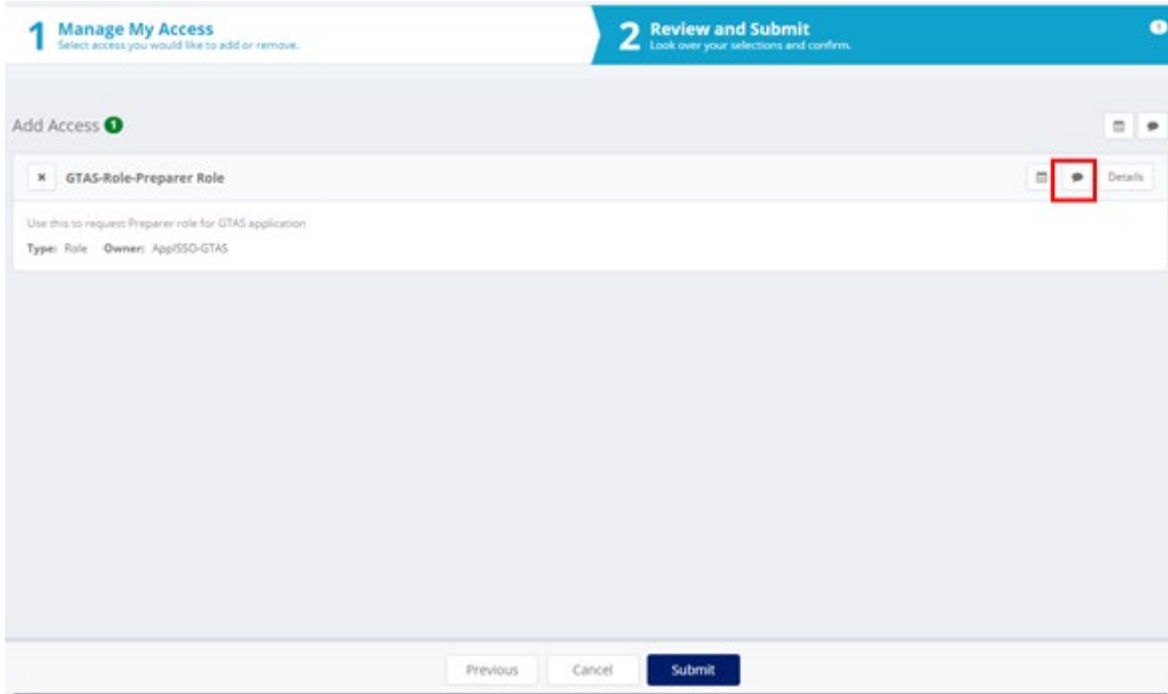
GTAS

Add 1 Showing 1-3 of 3

<input type="checkbox"/>	GTAS-Role-Certifier Role Details
Use this to request Certifier role for GTAS application Type: Role Owner: AppISSO-GTAS	
<input type="checkbox"/>	GTAS-Role-Executive Role Details
Use this to request Executive role for GTAS application Type: Role Owner: AppISSO-GTAS	
<input checked="" type="checkbox"/>	GTAS-Role-Preparer Role Details
Use this to request Preparer role for GTAS application Type: Role Owner: AppISSO-GTAS	

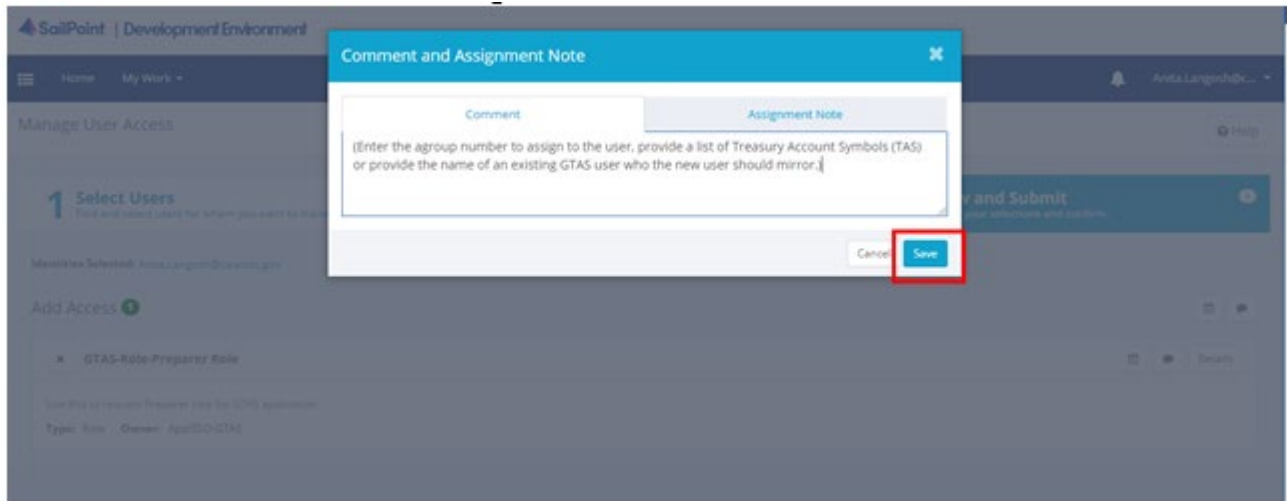


19. The Add Access screen will display. Click the Comments icon.



20. In the Comments field provide the information for the Treasury Account Symbol permissions to be assigned to the new user. Provide one of the bulleted items below, then click **Save**.

- Access Group (Agroup) number
- A List of Treasury Account Symbol (TAS)
- The name of an existing GTAS user who the new user should mirror





21. Review the Add Access request for accuracy, then click **Submit**.

22. The **Request submitted successfully** message will display. The status of submitted request may be viewed under **Track My Requests**.

Request submitted successfully. The ID for this request is 236389.

Note: The Request will route to the Manager to for action. Once the Manager has approved, the request will route to the Treasury Support Center to complete the Account Add request. The new user will receive an auto generated email when approved or if rejected.



Modifying or removing User Access

1. The user logs onto SailPoint IIQ. <https://iiq.fiscal.treasury.gov>

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 PIV / CAC

 ID.me

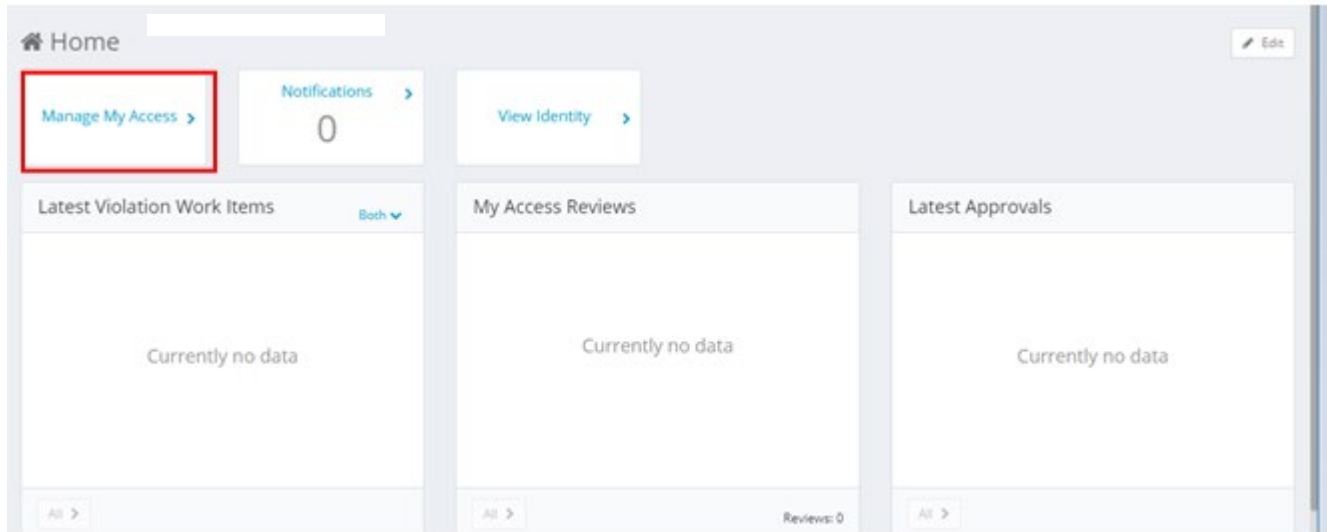
 LOGIN.GOV

Authenticate using PIV, PIV-I, CAC, Yubikey

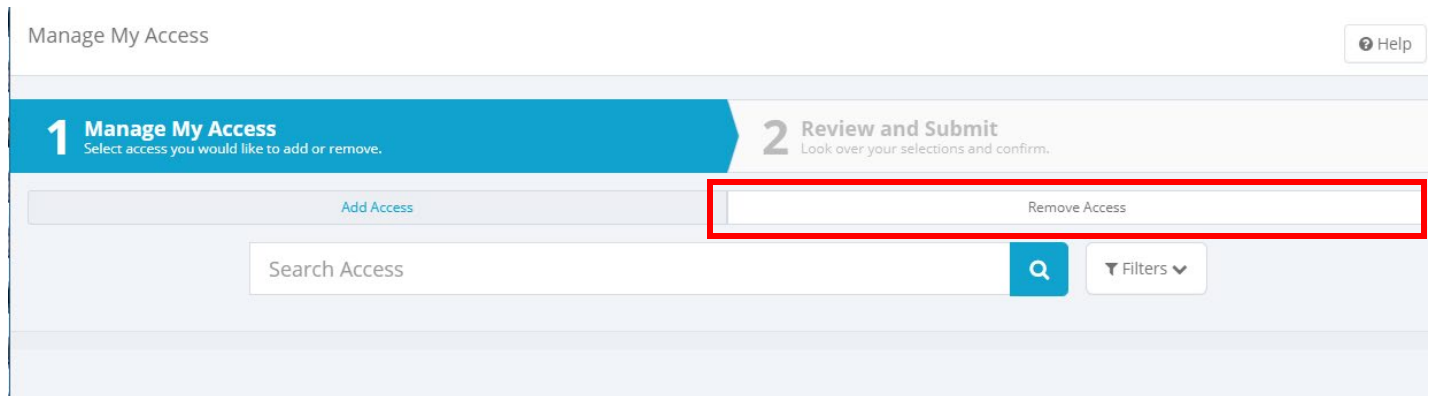
Certificate Authentication enables U.S. Federal employees and contractors to authenticate using a federally provided credential (PIV, PIV-I, CAC, Yubikey)



2. The User clicks **Manage My Access**.



3. The **Add Access** and **Remove Access** options will display. Click **Remove Access** to view currently assigned permissions.





4. Click the checkbox next to the role to remove. Click **Add Access** to select the new role permission.

Manage My Access Help

1 Manage My Access
Select access you would like to add or remove.

2 Review and Submit
Look over your selections and confirm. 1

Add Access

Remove Access 1

Search Current Access [Magnify] [Filters]

Remove 1 Showing 1-1 of 1

x	GTAS-Role-Preparer Role Details
<p>Status: Assigned</p> <p>Use this to request Preparer role for GTAS application</p> <p>Type: Role Owner: AppISSO-GTAS</p>	

Remove 1 Showing 1-1 of 1

Next

5. Enter GTAS in the search field and click the magnify icon.

1 Manage My Access
Select access you would like to add or remove.

2 Review and Submit
Look over your selections and confirm.

Add Access

Remove Access

GTAS
[Magnify]
[Filters]

Showing 1-3 of 3

<input checked="" type="checkbox"/>	GTAS-Role-Certifier Role Details
<p>Use this to request Certifier role for GTAS application.</p> <p>Type: Role Owner: AppISSO-GTAS</p>	
<input checked="" type="checkbox"/>	GTAS-Role-Executive Role Details
<p>Use this to request Executive role for GTAS application</p> <p>Type: Role Owner: AppISSO-GTAS</p>	
<input checked="" type="checkbox"/>	GTAS-Role-Preparer Role Details
<p>Use this to request Preparer role for GTAS application</p> <p>Type: Role Owner: AppISSO-GTAS</p>	



5. Click the checkbox next to the role to be added and click **Next**.

Manage My Access Help

1 Manage My Access
Select access you would like to add or remove.

2 Review and Submit
Look over your selections and confirm.

Add Access 1

Remove Access 1

GTAS Filters

Add 1

Showing 1-3 of 3

<input checked="" type="checkbox"/>	<p>GTAS-Role-Certifier Role Details</p> <p>Use this to request Certifier role for GTAS application</p> <p>Type: Role Owner: AppISSO-GTAS</p>
<input type="checkbox"/>	<p>GTAS-Role-Executive Role Details</p> <p>Use this to request Executive role for GTAS application</p>

Next

6. Confirm the role to remove and the role to add and click **Submit**.

Manage My Access Help

1 Manage My Access
Select access you would like to add or remove.

2 Review and Submit
Look over your selections and confirm.

Add Access 1

Remove Access 1

GTAS Filters

Add Access 1

✕ GTAS-Role-Certifier Role Details

Use this to request Certifier role for GTAS application

Type: Role Owner: AppISSO-GTAS

Remove Access 1

✕ GTAS-Role-Preparer Role Details

Use this to request Preparer role for GTAS application

Type: Role Owner: AppISSO-GTAS

Previous
Cancel
Submit



7. The **Request submitted successfully** message will display. The status of submitted request may be viewed under **Track My Requests**.

Request submitted successfully. The ID for this request is 236389.

Note: The Request will route to the Manager to for action. Once the Manager has approved, the request will route to the Treasury Support Center to complete the Account modification request. The user will receive an auto generated email when approved or if rejected.



Appendix A.

GTAS External Roles

GTAS is used by agencies to report budget execution information and proprietary financial reporting information to the Department of the Treasury. Each user may have only one agency role.

Preparer

This is an agency role used to upload ATB data and review it for accuracy. Multiple users at each agency should be assigned this role, encouraging cross-verification and separation of duties. This role may also be used by service providers who act on behalf of one or more agencies. Preparers must be assigned to an Access Group), granting them access to one or more agencies' TAS's or a subset of TAS's. This role is for the users at the various agencies who are responsible for all aspects of extracting data from their core accounting systems, loading trial balance data into GTAS, and reviewing the data for accuracy.

- Uploads bulk files
- Certifies ATB periods 2-11
- Enters year end manual adjustments
- Explains material differences periods 3, 6, 9 and 12

Certifier

This role is for external agency users who are responsible for certifying the trial balance data and material differences by TAS.

- Certifies ATB period 12
- Certifies year end manual adjustments
- Agency CFO or designee certifies material difference reporting periods 3, 6, 9 and 12

Executive

This role is for those users who are running reports only. Users will not have access to upload, update, or delete any data throughout the system. Any user at any agency may request access to this role.