

## REVISION CHART

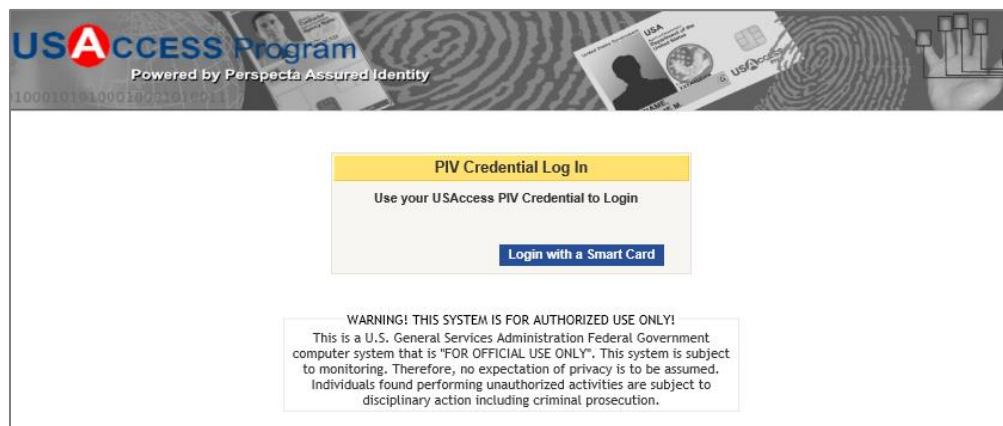
Version	Primary Author(s)	Description of Version	Date Completed
1.0	Amanda Dosch	Updated original	4/24/19
1.1	Amanda Dosch	Updated screenshots	5/1/19
1.2	Tavia Bazemore	Added note in regards to updating the Ship To address.	9/9/19
1.3	Tavia Bazemore	Updated document per Release 17. Added note referencing locked out message	11/22/19
1.4	Amanda Dosch	Updated footer to reflect date of last update (11/22/19)	3/10/2020

The GSA Site Manager Tool is a web portal that USAccess role holders use to manage and update agency sites and workstations. The tool is accessible from a user's desktop computer or an activation station. The desktop computer must be set up with a card reader and ActivClient middleware to access Site Manager. Site Manager requires an active credential and appropriate USAccess role to log in to the tool.

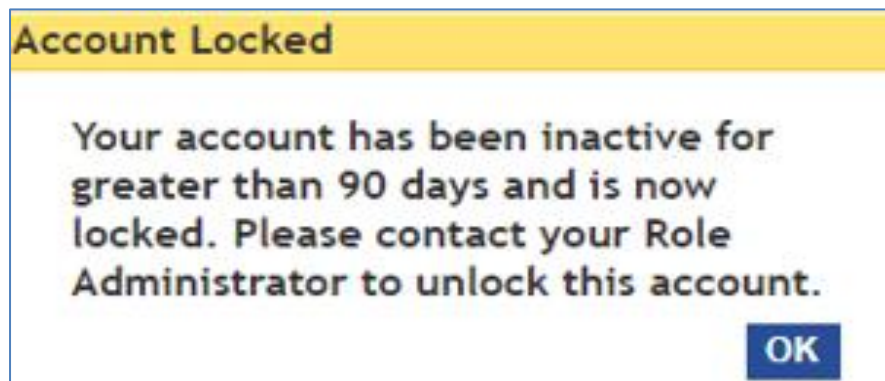
This Job Aid provides Local Site Managers (LSMs) with instructions for using the Site Manager Tool to add and manage sites within the manager's agency and scope of permissions.

## Log in to Site Manager

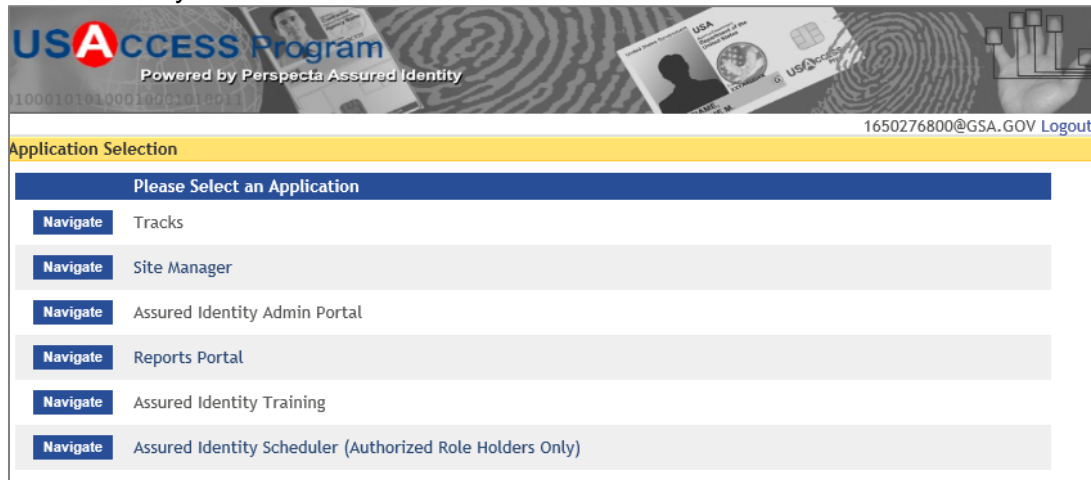
Access Site Manager by logging in to the USAccess system: <https://portal.usaccess.gsa.gov/aisso>. The PIN associated with your PIV Credential is required to log into USAccess.



**NOTE: A role holder who has not logged in for more than 90 days will receive the account locked message. The Agency Role Admin must then log in to the Roles Admin Portal and reset the role holder's account.**



Upon successful login to the USAccess system, select the Site Manager Application and then your role. Role selection determines the system features that are shown.



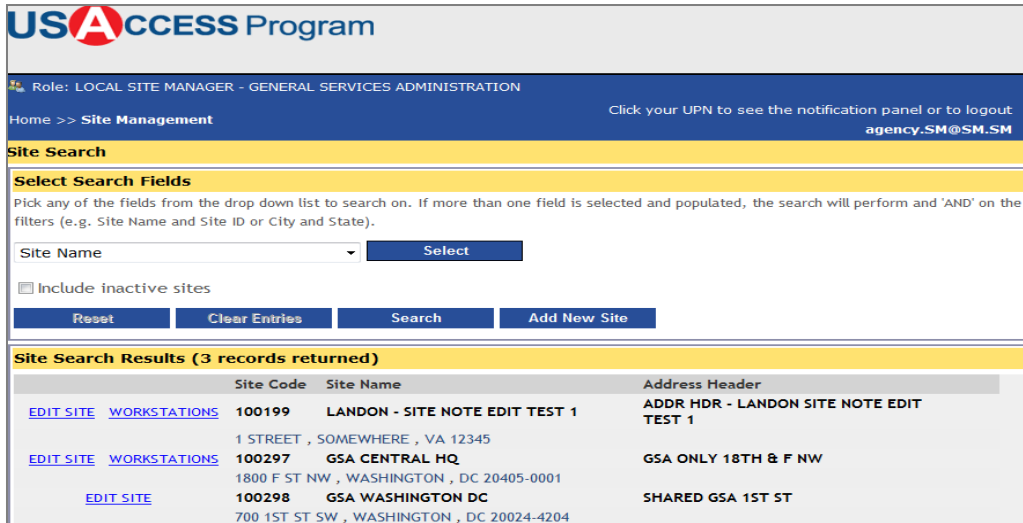
## Site Management

The Local Site Manager home tab shows the available tools including a list of sites currently assigned, site search and an option to add a new site.

Individual site management is assigned to LSMs in two ways:

- The Agency Site Manager (ASM) assigns sites to the LSM.
- Sites the LSM creates will be automatically assigned to the creator upon approval by the ASM.

The LSM will see all currently assigned sites in the lower portion of the screen. If the LSM is assigned many sites, the search feature can be used to find a specific site or a group of sites. New sites can be added using the **“Add New Site”** button.



**USACCESS Program**

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management

Click your UPN to see the notification panel or to logout  
agency.SM@SM.SM

**Site Search**

**Select Search Fields**

Pick any of the fields from the drop down list to search on. If more than one field is selected and populated, the search will perform an 'AND' on the filters (e.g. Site Name and Site ID or City and State).

Site Name

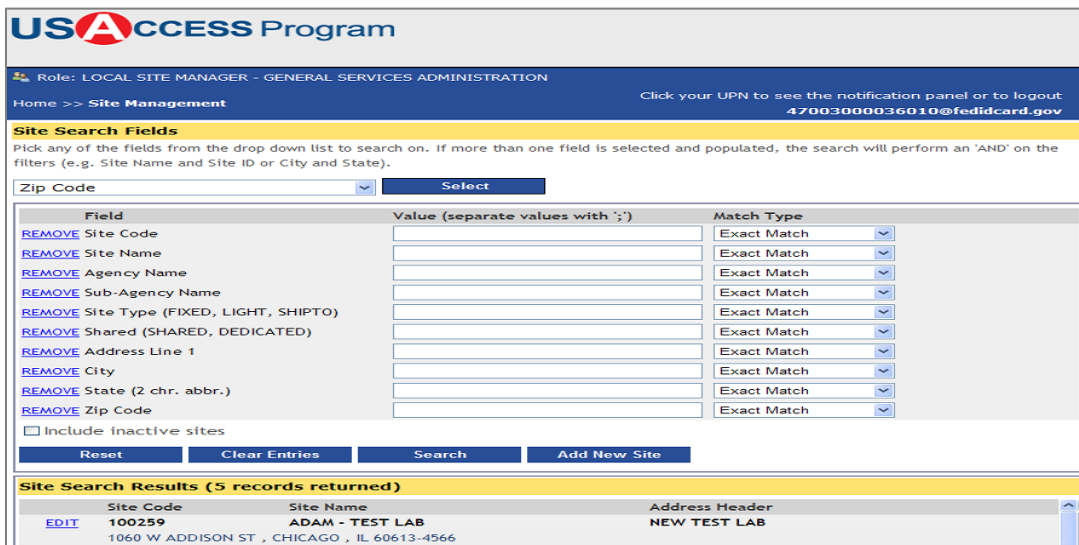
☐ Include inactive sites

**Site Search Results (3 records returned)**

Site Code	Site Name	Address Header
<a href="#">EDIT SITE</a> <a href="#">WORKSTATIONS</a> 100199	LONDON - SITE NOTE EDIT TEST 1	ADDR HDR - LONDON SITE NOTE EDIT TEST 1
1 STREET , SOMEWHERE , VA 12345		
<a href="#">EDIT SITE</a> <a href="#">WORKSTATIONS</a> 100297	GSA CENTRAL HQ	GSA ONLY 18TH & F NW
1800 F ST NW , WASHINGTON , DC 20405-0001		
<a href="#">EDIT SITE</a> 100298	GSA WASHINGTON DC	SHARED GSA 1ST ST
700 1ST ST SW , WASHINGTON , DC 20024-4204		

## Site Search

To search for an existing site within your list of assigned sites, select the criteria to be applied. Inactive sites can be included by clicking the box labeled **“Include inactive sites”** just above the **“Reset”** button. Once the values have been populated, select **“Search.”** Results will appear in the Site Search Results box below the Search Criteria Fields.



**USACCESS Program**

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management

Click your UPN to see the notification panel or to logout  
47003000036010@fedidcard.gov

**Site Search Fields**

Pick any of the fields from the drop down list to search on. If more than one field is selected and populated, the search will perform an 'AND' on the filters (e.g. Site Name and Site ID or City and State).

Zip Code

Field	Value (separate values with ';')	Match Type
<a href="#">REMOVE</a> Site Code	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Site Name	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Agency Name	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Sub-Agency Name	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Site Type (FIXED, LIGHT, SHIPTO)	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Shared (SHARED, DEDICATED)	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Address Line 1	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> City	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> State (2 chr. abbr.)	<input type="text"/>	Exact Match
<a href="#">REMOVE</a> Zip Code	<input type="text"/>	Exact Match

☐ Include inactive sites

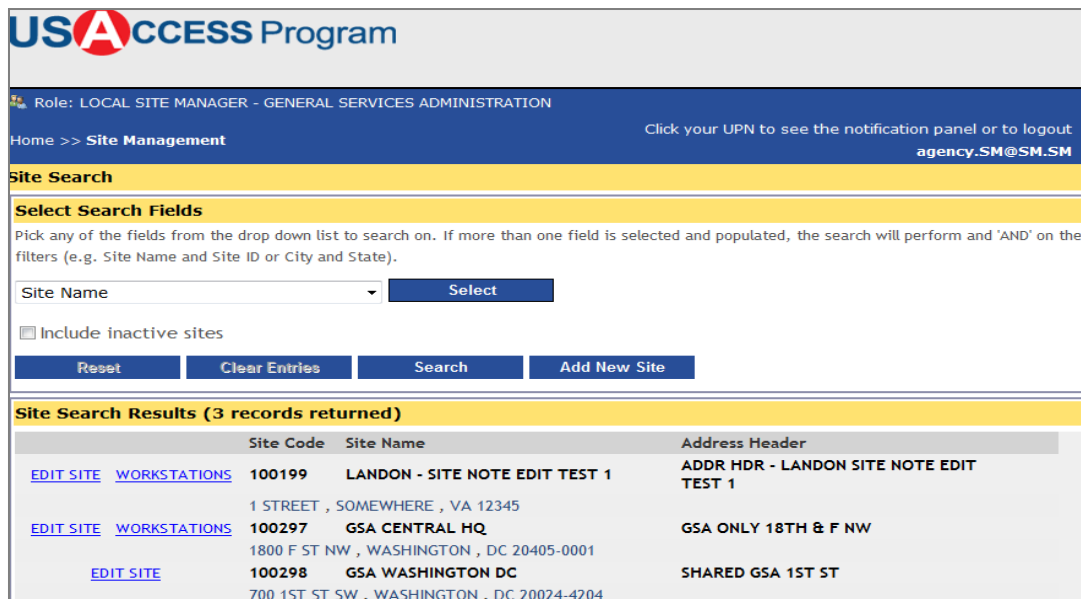
**Site Search Results (5 records returned)**

Site Code	Site Name	Address Header
<a href="#">EDIT</a> 100259	ADAM - TEST LAB	NEW TEST LAB
1060 W ADDISON ST , CHICAGO , IL 60613-4566		

## Create a New Site

Local Site Managers have the ability to create new sites. Click the **“Add New Site”** button to create a new site.

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**USACCESS Program**

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management

Click your UPN to see the notification panel or to logout  
agency.SM@SM.SM

**Site Search**

**Select Search Fields**

Pick any of the fields from the drop down list to search on. If more than one field is selected and populated, the search will perform and 'AND' on the filters (e.g. Site Name and Site ID or City and State).

Site Name

☐ Include inactive sites

**Site Search Results (3 records returned)**

	Site Code	Site Name	Address Header
<a href="#">EDIT SITE</a> <a href="#">WORKSTATIONS</a>	100199	LONDON - SITE NOTE EDIT TEST 1	ADDR HDR - LONDON SITE NOTE EDIT TEST 1
		1 STREET , SOMEWHERE , VA 12345	
<a href="#">EDIT SITE</a> <a href="#">WORKSTATIONS</a>	100297	GSA CENTRAL HQ	GSA ONLY 18TH & F NW
		1800 F ST NW , WASHINGTON , DC 20405-0001	
<a href="#">EDIT SITE</a>	100298	GSA WASHINGTON DC	SHARED GSA 1ST ST
		700 1ST ST SW , WASHINGTON , DC 20024-4204	

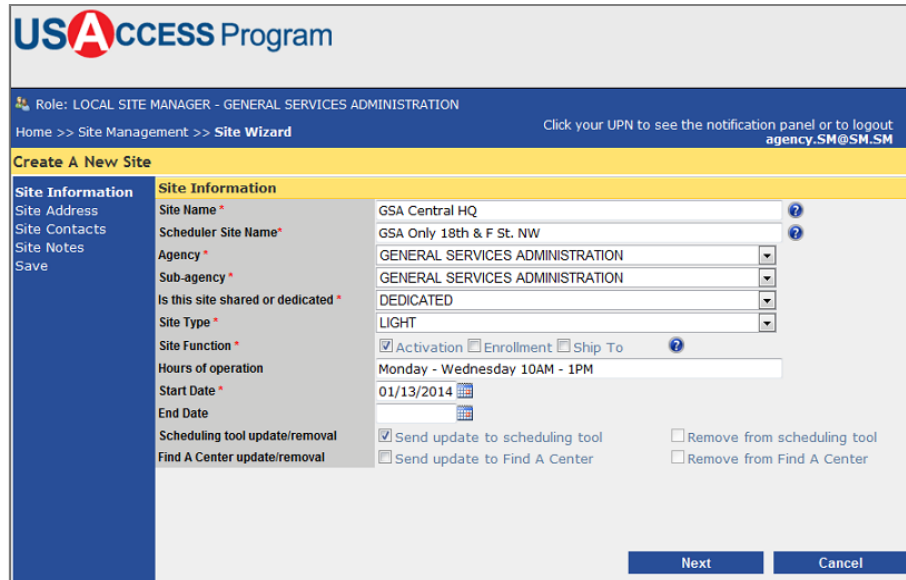
## Populate Site Information

Complete the required fields (marked with a \*) in the Site Information tab: Site Name, Scheduler Site Name, Agency, Sub-Agency, Shared or Dedicated, Site Type, Site Function, and Start Date. Hours of operation and Site End Date can also be entered if the information is known.

The “**Site Name**” appears on the ship-to location drop down box in the Sponsorship Portal. The “**Scheduler Site Name**” appears in the Assured Identity Scheduler.

Selecting the “?” help icon to the right of the “**Site Name**” field will prompt a pop up message to appear indicating that the Site Name will appear in the Sponsorship Portal when selecting a ship-to location.

Selecting the “?” help icon to the right of the “**Scheduler Site Name**” field will prompt a pop up message to appear indicating that the Location/Site Name will display in the Assured Identity Scheduler Tool. If the site is a shared site, include the word SHARED at the beginning of the site name. The “**Scheduler Site Name**” field is limited to 80 characters.



USACCESS Program

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management >> Site Wizard

Click your UPN to see the notification panel or to logout [agency.SM@SM.SM](#)

Create A New Site

**Site Information**

Site Address  
Site Contacts  
Site Notes  
Save

Site Name \* GSA Central HQ ?

Scheduler Site Name\* GSA Only 18th & F St. NW ?

Agency \* GENERAL SERVICES ADMINISTRATION

Sub-agency \* GENERAL SERVICES ADMINISTRATION

Is this site shared or dedicated \* DEDICATED

Site Type \* LIGHT

Site Function \* ☒ Activation ☐ Enrollment ☐ Ship To ?

Hours of operation Monday - Wednesday 10AM - 1PM

Start Date \* 01/13/2014

End Date

Scheduling tool update/removal ☒ Send update to scheduling tool ☐ Remove from scheduling tool

Find A Center update/removal ☐ Send update to Find A Center ☐ Remove from Find A Center

Next Cancel

Check the box beside **“Send update to scheduling tool”** if this site will be available for scheduling in the Assured Identity Scheduler tool and check the box beside **“Send update to Find A Center”** if the site will be listed on [www.fedidcard.gov](http://www.fedidcard.gov) Find A Center. When all Site Information is populated click the **“Next”** button.

### Populate Site Address

Enter the required address information. Selecting the “?” help icon to the right of the **“Street Address”** field will prompt a pop up message to appear indicating that credentials will not be delivered to PO Boxes. This is important to remember if the site being created is a **“Ship To”** site.

**Note:** Update the Ship-To address as follows:

- **Address Header:** Site Name (e.g., GSA - USAccess)
- **Street Address Line 1:** Agency desired name (e.g., GSA - USAccess) - This can also include a sub-agency or bureau.
- **Street Address Line 2:** Full street address including Room/Suite Number (e.g, 1800 F Street NW, Room 1033A)
- **City:** Washington
- **State:** DC
- **Zip Code:** 20405

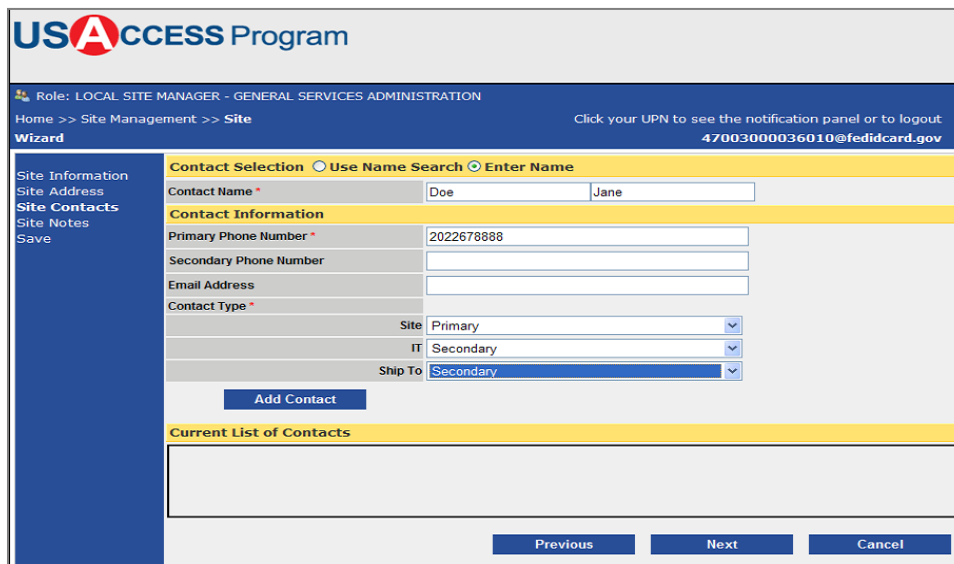
**Note:** if the Latitude and Longitude coordinates are unknown, click the **“Verify Address”** button. A map will appear and the coordinates will be provided only if the entered address is valid. If the entered address is valid, ensure the **“Use this validated address”** box at the top of the Address Verification page is checked. The geocode information will be provided including the Latitude and Longitude coordinates.

Yellow “!” icons on the Address Verification page indicate changes made by the verification tool. Click **“Save”** to accept the changes or **“Cancel”** to cancel the changes made by the Address Verification tool.

Check the **“Use this validate address”** and **“Use this geocode information”** check boxes to save only the validated address or only the geocode information. Geocode information is required if the **“Send update to Scheduling tool”** box is checked on the Site Information tab. Click the **“Next”** button when complete.

## Populate Site Contacts

Enter **“Contact Name”** and **“Contact Information.”** Select either **“Primary”** or **“Secondary”** for **“Contact Type.”** Click **“Add Contact.”**



**USACCESS Program**

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management >> Site Wizard

Click your UPN to see the notification panel or to logout: 47003000036010@fedidcard.gov

**Contact Selection** ☐ Use Name Search ☒ Enter Name

**Contact Name \*** Doe Jane

**Contact Information**

Primary Phone Number \* 2022678888

Secondary Phone Number

Email Address

**Contact Type \***

Site Primary

IT Secondary

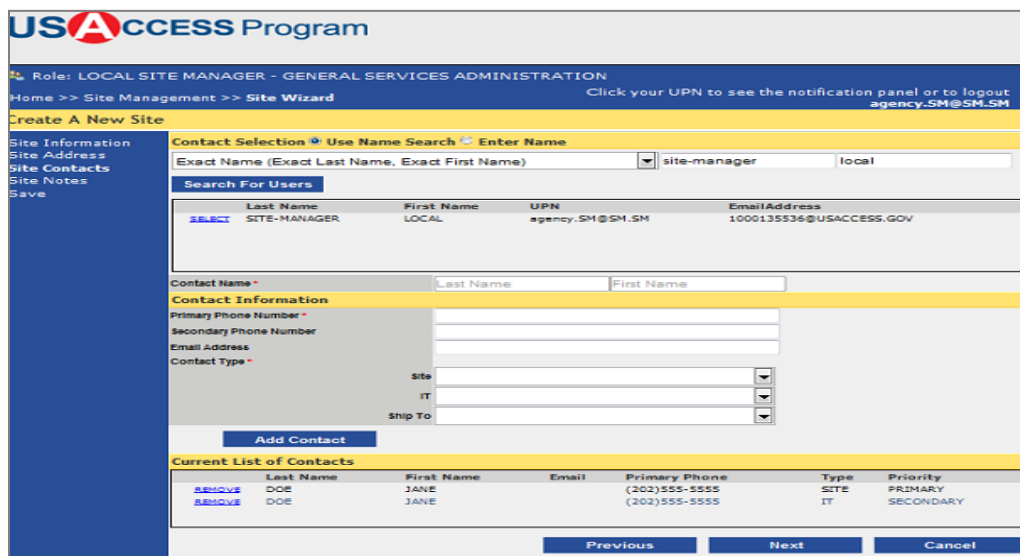
Ship To Secondary

**Add Contact**

**Current List of Contacts**

Previous Next Cancel

Once the contact has been added they will appear in the **“Current List of Contacts”** on the screen. If the contact person or phone number has changed, select **“Remove”** and enter the new contact information.



**USACCESS Program**

Role: LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Management >> Site Wizard

Click your UPN to see the notification panel or to logout: agency.SM@SM.SM

**Create A New Site**

**Contact Selection** ☒ Use Name Search ☐ Enter Name

**Exact Name (Exact Last Name, Exact First Name)** site-manager local

**Search For Users**

SELECT	Last Name	First Name	UPN	EmailAddress
<a href="#">SELECT</a>	SITE-MANAGER	LOCAL	agency.SM@SM.SM	1000135536@USACCESS.GOV

**Contact Name \*** Last Name First Name

**Contact Information**

Primary Phone Number \*

Secondary Phone Number

Email Address

**Contact Type \***

Site

IT

Ship To

**Add Contact**

**Current List of Contacts**

	Last Name	First Name	Email	Primary Phone	Type	Priority
<a href="#">REMOVE</a>	DOE	JANE		(202)555-5555	SITE	PRIMARY
<a href="#">REMOVE</a>	DOE	JANE		(202)555-5555	IT	SECONDARY

Previous Next Cancel

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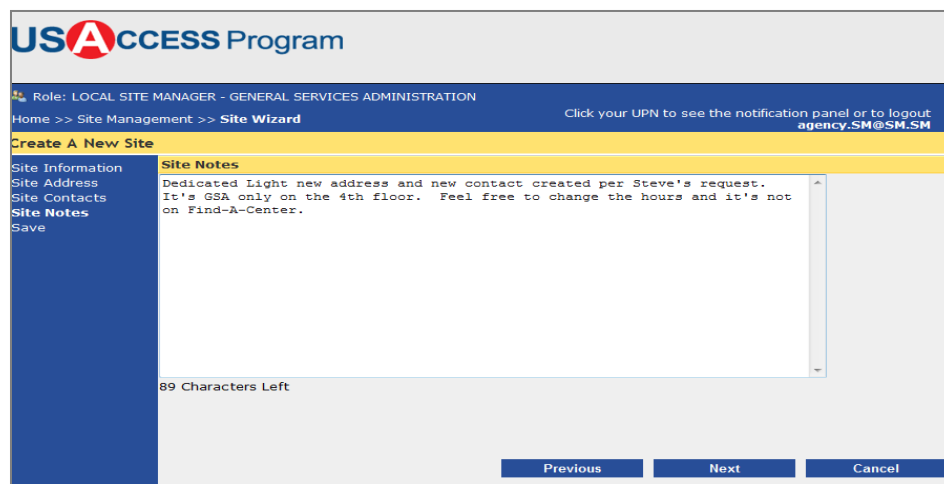


The default **“Contact Selection”** radio button is set to manually enter the POC name but users can also search for contacts by selecting the **“Use Name Search”** radio button. Site Managers can search only within their agency and scope.

Note: All sites require at least one primary site contact. Sites that include “Ship To” function also require a “Ship To” primary contact. A pop up box appears if required contacts are missing. When all Site Contacts information is populated click the **“Next”** button.

## Populate Site Notes

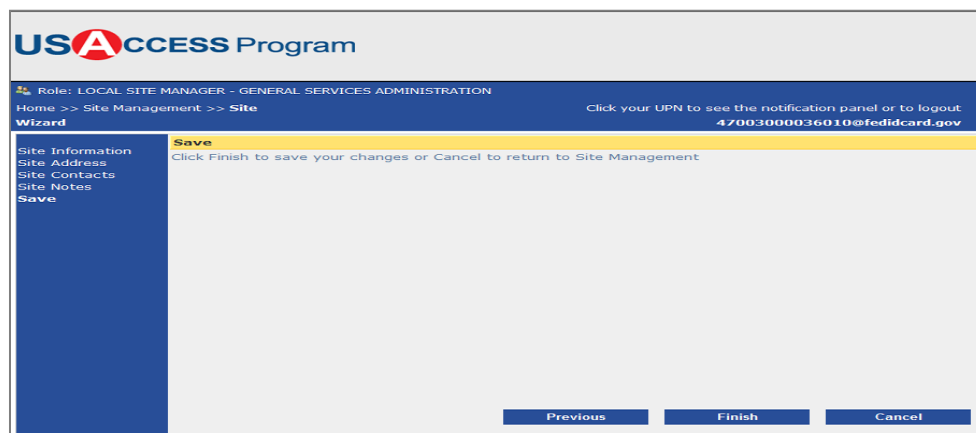
Enter any applicable notes about the site. The **“Site Notes”** field is limited to 256 characters. When the information is populated click the **“Next”** button.



The screenshot shows the 'USACCESS Program' interface. The role is 'LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION'. The breadcrumb trail is 'Home >> Site Management >> Site Wizard'. The current step is 'Create A New Site'. The left sidebar lists 'Site Information', 'Site Address', 'Site Contacts', 'Site Notes', and 'Save'. The 'Site Notes' field is active, containing the text: 'Dedicated Light new address and new contact created per Steve's request. It's GSA only on the 4th floor. Feel free to change the hours and it's not on Find-A-Center.' Below the text area, it says '89 Characters Left'. At the bottom, there are three buttons: 'Previous', 'Next', and 'Cancel'.

## Save Site

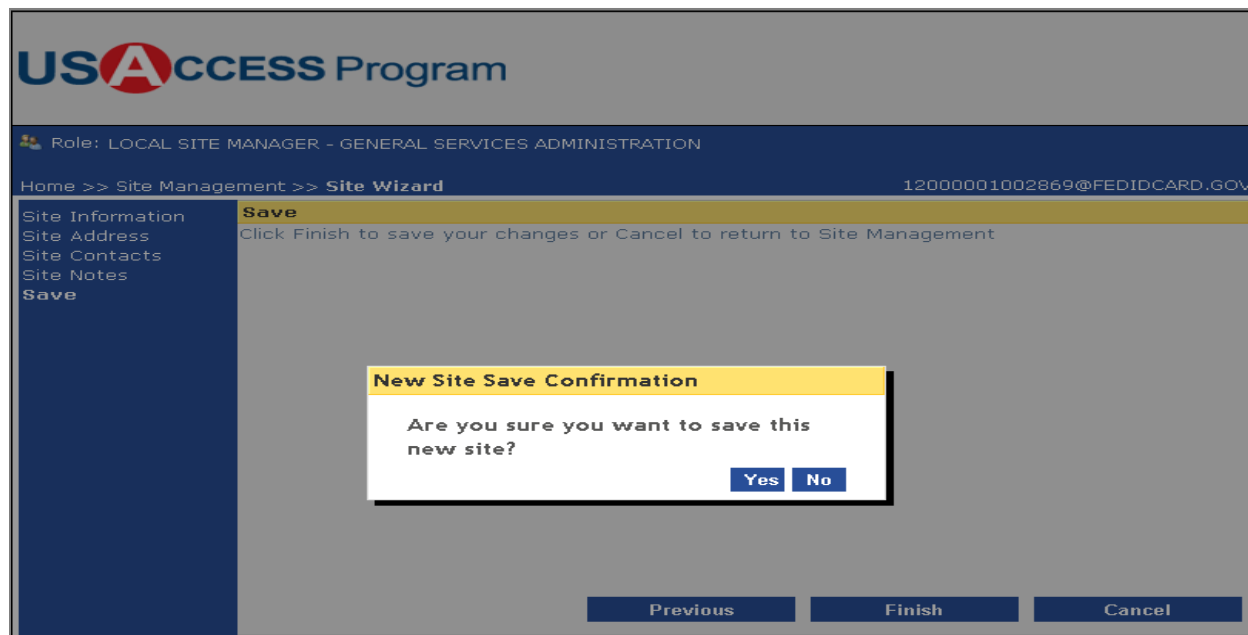
To save the site you’ve created click ‘Finish’.



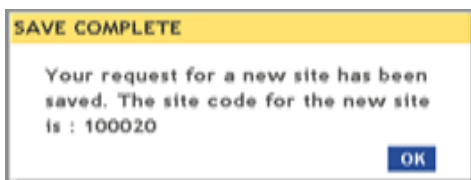
The screenshot shows the 'USACCESS Program' interface. The role is 'LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION'. The breadcrumb trail is 'Home >> Site Management >> Site Wizard'. The current step is 'Save'. The left sidebar lists 'Site Information', 'Site Address', 'Site Contacts', 'Site Notes', and 'Save'. The 'Save' field is active, containing the text: 'Click Finish to save your changes or Cancel to return to Site Management'. At the bottom, there are three buttons: 'Previous', 'Finish', and 'Cancel'.

A pop-up box will appear asking if you are sure you want to save this new site.

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If the new site should not be saved, click **“No.”** The user will be returned to the Save page. To make edits to the information previously entered, click **“Previous.”** Once the new site is ready to be saved, click **“Yes.”** A **“Save Complete”** pop up box will appear showing the site code for the newly created site.



Click **“Ok”** and then **“Finish.”**

## View Requests

Sites created or edited by the Local Site Manager must be approved by the Agency Site Manager. Only changes to site POCs and the hours of operation do not need approval by the Agency Site Manager. When the site is saved, site POCs and hours of operation are sent directly to the Site database.

The Local Site Manager will receive an email when the Agency Site Manager rejects a request. Click the UPN located in the upper right corner of the Site Manager tool to view submitted requests. Select the **“Click to view your requests”** button to view the status of site requests.

Click your UPN to see the notification panel or to logout  
47003000036023@fedidcard.gov

**My Submitted Requests Summary**

[Click to view your requests](#)

**0 Unprocessed Requests**  
These are pending requests that can be cancelled

**6 In Process Requests**  
These are requests that have been approved by an ASM and are pending SSM review

**0 Rejected Requests**  
These requests have been rejected. Check your email for the rejection notice which may contain some notes from the reviewer

**1 Approved Requests**  
These requests have been approved and are in production

[Logout](#)

Only requests submitted to the Agency Site Manager will display in this list.

Icon descriptions are shown in the icon legend on the left side of the screen.

Role: AGENCY SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> [Your Requests](#)

**Site Search**  
Pick any of the filters (e.g., Site Name, Status, Date, etc.)

**Icon key**  

- Cancel
- Request
- Request Locked
- Pending Requests
- In Process Requests
- Rejected Requests
- Approved Requests
- Request Details

Req ID	Req Date	Site Code	Site Name
101	10/7/2013 10:00:29 AM	100230	D-L-E
106	10/7/2013 2:39:42 PM	100263	THIS IS MY SITE
107	10/7/2013 2:47:08 PM	100264	ADAM'S HOUSE OF IL REPUTE
108	10/7/2013 3:08:25 PM	100265	HP
111	10/7/2013 3:19:06 PM	100268	ASM CREATED 3
112	10/7/2013 3:24:47 PM	100269	ASM CREATED 4
201	10/22/2013 1:46:31 PM	100297	GSA TEST SITE 4

Site Code: 100265 Status: ASM Approved

ASM Reviewer: ASM-REGISTRAR, STG Date: 10/7/2013 3:08:25 PM Status: Approved

SSM Reviewer: Date: Status:

Notes:

[Hide Details](#) [OK](#)

Click the Notepad icon to view individual request status and approver information.

Click "UPN@USAccess.gov" at the top right hand corner of the page to exit Site Manager. The dropdown list will appear. Click "logout" at the bottom of the list.