



USER'S MANUAL

*Tenant Rental Assistance Certification System (TRACS)
Integrated Multifamily Access eXchange (iMAX)*

U.S. Department of Housing and Urban Development

September 2008

Revision Sheet

Release No.	Date	Revision Description
Rev. 1	3/21/08	Draft User Manual
Rev. 2	5/09/08	Final User Manual
Rev. 2.1	5/12/08	Updated sections 3.1 and 4.2.6.3 with screen shots.



User's Manual Authorization Memorandum

I have carefully assessed the User's Manual for the Integrated Multifamily Access Exchange (iMAX). This document has been completed in accordance with the requirements of the HUD System Development Methodology.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

James Legge
HUD IT Project Manager

DATE

Deatrie M. Perry
TRACS Project Manager

DATE

John J. Curry Jr.
Housing Project Manager

DATE

USER'S MANUAL

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1.0 GENERAL INFORMATION

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1.1 System Overview

TRACS is designed to process subsidy contracts, tenant rental assistance information, and owner requests for payment (vouchers). TRACS collects tenant data and voucher data for project-based programs and authorizes payment for subsidy programs. Payments are based upon the voucher, contract, and tenant data residing in the system. Owner Agents are required to meet the Compliance Rule of 2003, which requires the submission of their current and active certifications (tenant data) under contract in order to receive subsidy payments. iMAX provides a replacement for the current TRACSMail system, enabling electronic submissions of certifications and vouchers into the TRACS system and storing all submission related data in an Oracle 10g data base.

iMAX is a web-based communication system that provides Contract Administrators (CA) and Owner Agents (OA) who have subsidy contracts with HUD to transmit to HUD and to other OA's and CA's registered with iMAX, tenant data and voucher data files. Files sent to HUD are logged, processed, and submitted to the Tenant Rental Assistance Certification System (TRACS) for payment processing by iMAX. iMAX also receives TRACS processing results and makes these results available to the external business partners of HUD.

iMAX provides two forms of access, a graphical user interface and a system-to-system communication interface. The graphical user interface is accessible through the Web Access Secure Systems (WASS) gateway at HUD. The system-to-system communication interface is available for software vendors of CA's and OA's. The system-to-system communication interface provides the same set of functionality as the graphical user interface.

The new iMAX system will keep all functions of the existing TRACSMail system. In addition, it acknowledges MAT file submissions in a real-time manner with a unique transaction ID, which can be used later for audit log searches. The iMAX system also keeps audit logs for all MAT requests, TRACS responses, and other processing events. The iMAX system will utilize J2EE/web technologies. One of the benefits of the J2EE/web technology is that end users do not need to install any additional software. All the user needs is a work station, a web browser and internet connection. In addition, file submission/download and user profile management are integrated seamlessly into the web interface so that end users do not need to go to different applications for file management and user management. Administration of the system will be much easier from the web application as audit logging and user management are integrated.

Responsible Organization	Multifamily Housing Program Support Division
System Name	Integrated Multifamily Access Exchange (iMAX)
System Code	F87
PCAS Number	25178
System Category	Client Server
Operational Status	Under Development / Pilot Phase
System Environment	Oracle 10g, Java 1.5.x, SOAP 1.2, J2EE 1.5

1.2 Project References

The following table identifies any existing regulations, standards, or documents that are pertinent to the iMAX project.

Reference	Date
HUD System Development Methodology 6.02	9/04
iMAX – Initiate Phase – Needs Statement	10/07
iMAX – Define Phase – Functional Requirements Document	01/08
TRACS/ARAMS System Subsystem Specifications	07/07

1.3 Authorized Use Permission

Misuse of Federal Information through the HUD Secure Connection web site falls under the provisions of Title 18, United States Code, Section 1030. This law specifies penalties for exceeding authorized access, alterations, damage, or destruction of information residing on Federal Computers. System Administrators have access to an audit trail database that records the details of access by Users.

1.4 Points of Contact

1.4.1 Information

The following is a list of the iMAX points of organizational contact (POCs) that may be needed for informational and troubleshooting purposes:

Role	Location	Phone
Francine Bland Government Technical Representative (GTR)	U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 4284 Washington, DC 20410	(202) 708-1035 Ext. 6078 Francine.Bland@hud.gov
James Legge Government Technical Monitor (GTM)/HUD Project Manager	U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 2262 Washington, DC 20410	(202) 708-0614 Ext. 7485 James.h.legge@hud.gov
Lanier Hylton Program Area/Sponsor Representative	U.S. Department of Housing and Urban Development 451 7 th St. SW, Room 6151 Washington, DC 20410	(202) 708-2677 Ext. 2510 Lanier.m.hylton@hud.gov

Role	Location	Phone
Ken Wood PSI Project Manager	Pyramid Systems, Inc. 8201 Corporate Dr, Suite 920 Hyattsville, MD 20785	(240) 296-5918 Ext. 312 kwood@psi-it.com
Michael Kim PSI System Architect	Pyramid Systems, Inc. 9302 Lee Highway, Suite 1200 Fairfax, VA 22031	(703) 553-0800 Ext. 116 mkim@psi-it.com
Yasmin Rashid Task Lead	Pyramid Systems, Inc. 9302 Lee Highway, Suite 1200 Fairfax, VA 22031	(703) 553-0800 Ext. 142 yrashid@psi-it.com

1.4.2 Coordination

The iMAX project will require coordination with various organizations, both government and non-government, to accomplish the tasks throughout the system life cycle. The table below lists these organizations, the coordination date and the phases in which Multifamily Housing coordinates tasks with these organizations.

Organization	Coordination Date	Support Function (Phase)
Office of Multifamily Housing	08/09/07 – 06/08/08	Participate in project initiation, requirements definition, and user acceptance test activities.
Pyramid Systems Incorporated (PSI)	08/09/07 – 06/08/08	Initiate, Define, Design, Build, Evaluate, Operate, Installation, Deployment, Project Management
HUD-IT Test Center	05/06/08 – 06/08/08	Implementation Coordination, Installation, Deployment
Industry users	08/09/07 – 06/08/08	Performs verification and field-testing of software prior to releases being installed into production.
HUD Information Technology Service (HITS)	11/27/07 – 06/08/08	Provides support for web application and database servers and performs all production releases.

1.4.3 Help Desk

The Multifamily Helpdesk will be responsible for responding to any user questions or concerns. The Multifamily Helpdesk can be contacted by phone at 1-800-767-7588 or email at tracs@hud.gov.

1.5 Organization of the Manual

1.0 General Information

This section provides the user with an overview of the iMAX project. It describes the system as well as providing a list of contacts, references, and acronyms and abbreviations.

2.0 System Summary

This section discusses the technical aspects of the iMAX system, while paying specific attention to data flows, configuration, and user access levels.

3.0 Getting Started

This section discusses how the user logs on to the iMAX system, changes the login password, and also provides a menu for all the different aspects of the system.

4.0 Using the System Online

This section discusses all of the different uses of the iMAX system for users and administrators. It goes into detail with step by step instructions for each function.

5.0 Using the System (Batch)

This section does not apply to iMAX since it is an online and not a batch system

6.0 Querying

This section discusses the querying and retrieval capabilities of the iMAX system.

7.0 Reporting

This section does not apply to the iMAX system since it does not contain this feature.

1.6 Acronyms and Abbreviations

The following table defines acronyms and abbreviations used throughout this document:

ACRONYM	Definition
CA	Contract Administrator
IG	Inspector General
iMAX	Integrated Multifamily Access Exchange
MAT	Monthly Activity Transmission
OA	Owner Agent
SOAP	Simple Object Access Protocol
TRACS	Tenant Rental Assistance Certification System

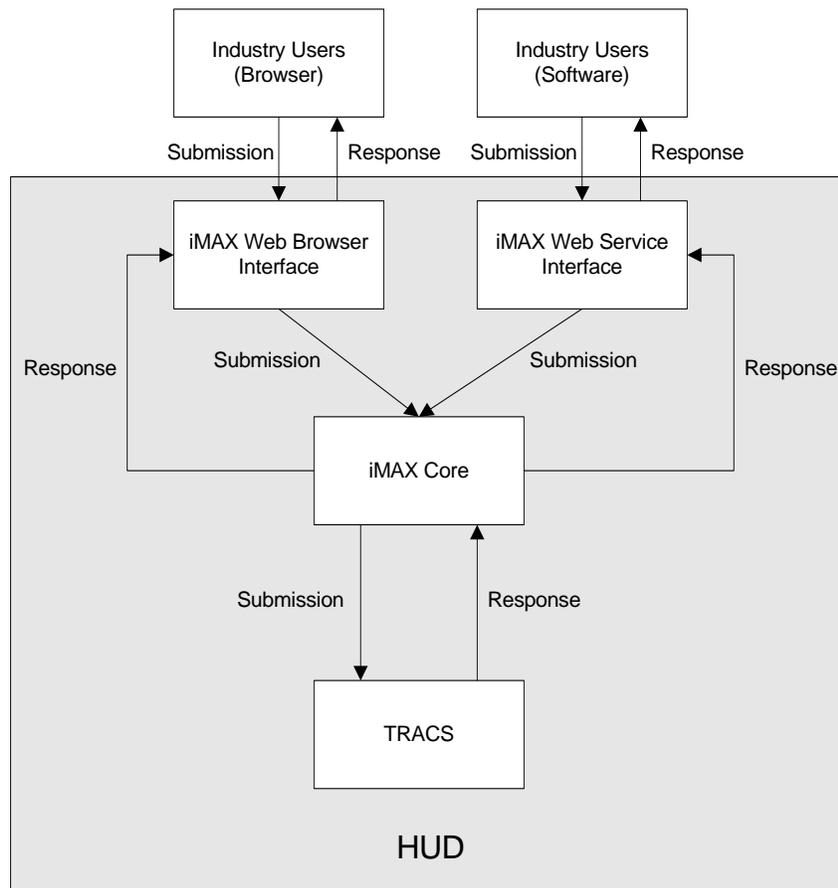
2.0 SYSTEM SUMMARY

2.0 SYSTEM SUMMARY

The integrated Multifamily Access Exchange (iMAX) replaces the current TRACSMail system. iMAX provides the same functionality available in the current TRACSMail system except available as a web browser graphical user interface and as a programmatic interface to software vendors. iMAX provides users the ability to send one or more MAT files to TRACS for processing or to other iMAX users. iMAX also provides users with the ability to manage their TRACS user information, viewing of MAT file submission to TRACS, viewing the status of those submissions, send and receive MAT files to other iMAX users, and view broadcast messages from TRACS administrators.

2.1 System Configuration

The integrated Multifamily Access Exchange resides within HUD's network but is accessible to everyone outside of HUD. The two main ways to access iMAX are through a web browser or through vendor software that can interface with iMAX. Both means of access to iMAX are available 24 hours a day and 7 days a week throughout the year. The diagram below is a high level depiction of the iMAX system and its interfaces to users and to TRACS.



2.2 Data Flows

The iMAX user can upload files via the web browser or via vendor software that calls iMAX web services. iMAX routes the files to the appropriate iMAX user or to a staging area to send to TRACS. iMAX combines the files, adds header information and FTPs the files every hour to the TRACS batch processing. TRACS processes the files during the nightly cycle and returns response files via FTP to iMAX. iMAX then parses the files and routes to the appropriate iMAX users.

2.3 User Access Levels

HUD policy requires entities communicating electronically with HUD that are outside of HUD's network be authenticated. Business partners wishing to communicate with HUD electronically are required to be registered and receive HUD business partner credentials, which is a WASS id and password. You can register with HUD's security services at HUD Secure Systems to receive the user id and password. These credentials are required for each individual that does business with HUD. Whether communicating through a browser to access HUD resources or communicating directly with iMAX, clients will need to provide their credentials. Once a client is authenticated, depending on the system, the client can be asked to provide system specific user credentials. All communications to iMAX require that the client also provide an iMAX user id and password, previously known as the TRACSMail user id and password. The iMAX id and password are available to a business entity rather than an individual.

2.4 Contingencies and Alternate Modes of Operation

Please refer to the TRACS Contingency Plan.

3.0 GETTING STARTED

3.0 GETTING STARTED

The system access is controlled using Web Access Secure System (WASS). Logging in with the WASS ID will make the iMAX system available to the user via link.

3.1 Logging On

1. Go to the following URL:
 - a) for internal HUD users: https://hudapps.hud.gov/HUD_Systems/index.cfm
 - b) for external users: <https://hudapps.hud.gov/ssmaster/index.cfm>
2. The following screen will appear:

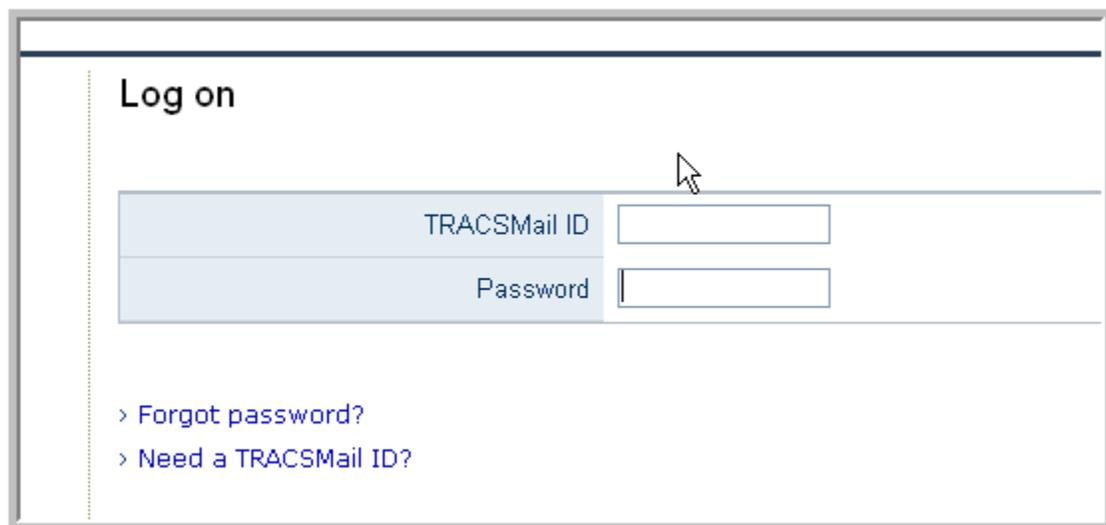


User Login

User ID

Password

3. Type the WASS User ID and Password into the respective fields and select “Login.”
4. After logging into WASS, click on the Integrated Multifamily Access Exchange (iMAX) link in the Secure Systems main menu.
5. The following screen will appear:



Log on

TRACSMail ID

Password

> [Forgot password?](#)

> [Need a TRACSMail ID?](#)

1. Enter your assigned TRACSMail/iMAX User ID and Password.
2. Click  on the right side of the screen and the iMAX main page will be displayed.



3.2 System Menu

User System Menu

3.2.1 iMAX User Broadcasts

The Broadcasts tab allows the user to view any messages that have been sent from the HUD Administrator. The user can view when the message was sent and can also access previously sent messages. Upon selecting this tab, the user will initially only be able to see the three most recent broadcast messages.



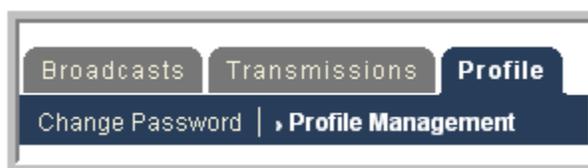
3.2.2 iMAX User Transmissions

The Transmissions tab allows the user to upload and send files to the HUD OA as well as to other iMAX users. This tab also allows the user to view any and all files that have been sent to or received from the HUD OA or any other iMAX user.



3.2.3 iMAX User Profile

The User Profile tab allows the user to view and make any necessary alterations to their iMAX profile or user password.



Administrator System Menu

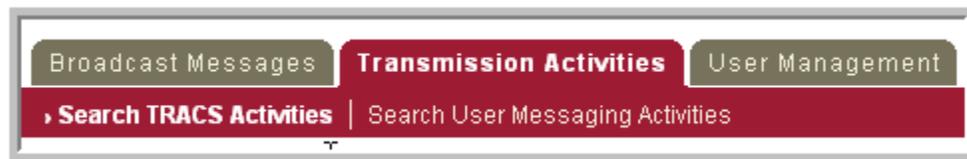
3.2.4 iMAX Administrator Broadcast Messages

The Administrator Broadcast Messages tab allows the HUD TRACS administrators to broadcast messages concerning TRACS to all iMAX users.



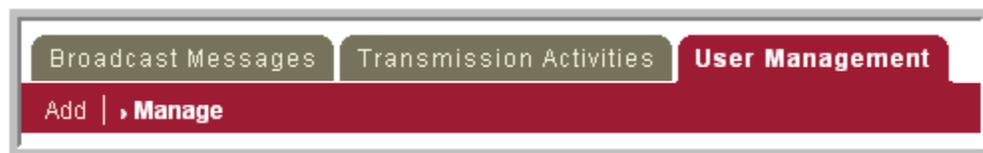
3.2.5 iMAX Administrator Transmission Activities

The Administrator Transmission Activities tab allows the HUD TRACS administrators to view any messages and files that have been sent to or received from iMAX users. It specifically allows the administrator to search for specific transmissions from a myriad of fields.



3.2.6 iMAX Administrator User Management

The Administrator User Management tab allows the HUD TRACS administrator to add, edit, reset, deactivate, and reactivate an iMAX user as well as make changes to user profiles when necessary.



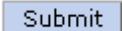
3.3 Changing Password

1. In order to change the password, click on the “Profile” tab from any screen.



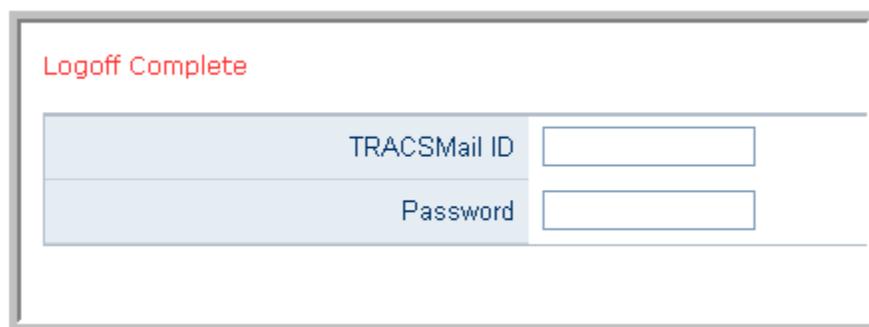
2. The My Profile page will appear. Click on the “Change Password” link in the upper left corner, under the “Broadcasts” tab.



3. Enter the current password, new password, and retype the new password in the required fields. Then click  fields. Then click

3.4 Exit System

1. To log off iMAX, locate and click on **Log off** at the top corner of the screen. This can be accomplished on any page while logged on.
2. The system terminates the current user session and displays Log on page with a message informing user logoff is completed.



The screenshot shows a rectangular window with a grey border. At the top left, the text "Logoff Complete" is displayed in red. Below this, there is a light blue rectangular area containing two rows of labels and input fields. The first row has the label "TRACSMail ID" followed by a white rectangular input box. The second row has the label "Password" followed by another white rectangular input box.

4.0 USING THE SYSTEM (ONLINE)

4.0 USING THE SYSTEM (ONLINE)

4.1 iMAX User Broadcasts

1. Select the Broadcasts tab in order to view received administrative broadcast messages.

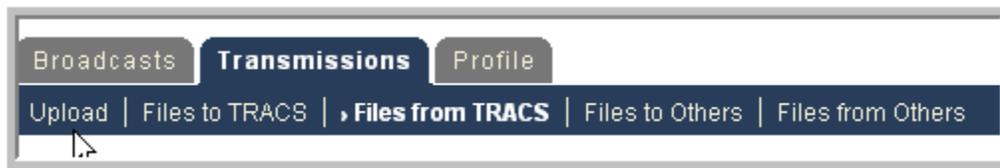
Date	Message ID	Message
May 8, 2008	30	The iMAX system will be offline from 10:00pm to 2:00am EST.

2. Click on the Previous or Next links to view an earlier or later set of messages.

4.2 iMAX User Transmissions

4.2.1 Upload

1. Select the Transmissions tab followed by the Upload sub tab.



2. The system displays the following fields to be filled: TRACS Destination, TRACSMail ID, Subject, and MAT File.

3. In the Destinations field, type in the location where the file or files are being sent. To send the file or files to TRACS, type in TRACMPROD or TRACMTEST. You can also send the file to different iMAX users by typing their iMAX User ID. If you wish to send the file to multiple users, be sure to separate the destinations with a comma followed by a space.

4. Type content in the Subject field.

5. In the MAT File field, select in order to select which .txt or .mat file you would like to send. Please be aware that iMAX can only upload .txt or .mat files.

6. At any point in the process you can start over by selecting on the right hand side of the page.

7. After filling in the required fields, select .

4.2.2 Files to TRACS

Selecting this tab allows the user to view the files that have been sent to a TRACS destination, either TRACMPROD or TRACMTEST.

Requests of Last 24 hours ▾					
Transaction ID	To	Subject	Uploaded	Transmitted	Status
TIN050820080000164	TRACMPROD	Test	2008-05-08 15:16:20 EDT	N/A	Received

4.2.3 Files from TRACS

Selecting this tab allows the user to view the files that have been received from TRACS

4.2.4 Files to Others

Selecting this tab allows the user to view the files that have been sent to other iMAX Users.

Transaction ID	To	Subject	Uploaded	Attachment
TIN050720080000156	TRACX16004	4	2008-05-07 13:52:23 EDT	f.txt
TIN050720080000154	TRACX15692 TRACMPROD TRACX16004 TRACX09405	files	2008-05-07 13:51:46 EDT	g.txt
TIN050720080000152	TRACX16004	hi	2008-05-07 13:50:22 EDT	f.txt
TIN050720080000121	TRACX16004	4	2008-05-07 13:29:07 EDT	f.txt

1. To view any file, select from the Attachments column.

4.2.5 Files from Others

Selecting this tab allows the user to view any files that have been received from other iMAX Users.

Transaction ID	From	Subject	Received	Attachment
TIN050820080000160	TRACMPROD	1	2008-05-08 11:33:20 EDT	TIN050820080000160.txt
TIN050820080000159	TRACMTEST	1	2008-05-08 11:32:01 EDT	TIN050820080000159.txt
TIN050720080000154	TRACX15692	files	2008-05-07 13:51:46 EDT	TIN050720080000154.txt
TIN050720080000149	TRACX15466	files	2008-05-07 13:43:46 EDT	TIN050720080000149.txt
TIN050720080000143	TRACX09405	files	2008-05-07 13:40:44 EDT	TIN050720080000143.txt

4.3 iMAX User Profile

4.3.1 Change Password

Please refer to section 3.3 for information

4.3.2 Profile Management

1. Select the Profile tab followed by the Profile Management sub-tab.



2. Select [Edit Profile](#) on the right hand side of the screen; the following screen will appear:

Edit User TRACX15692

First Name	<input type="text" value="Joe"/>
* Last Name	<input type="text" value="Smith"/>
Description	<input type="text"/>
Title	<input type="text" value="Building Manager"/>
Organization	<input type="text" value="Nunday Villa Apts"/>
Address	<input type="text" value="555 Main Street"/>
Telephone	<input type="text" value="15550000"/>
Fax	<input type="text"/>
Email	<input type="text" value="nundayvilla@aol.com"/>

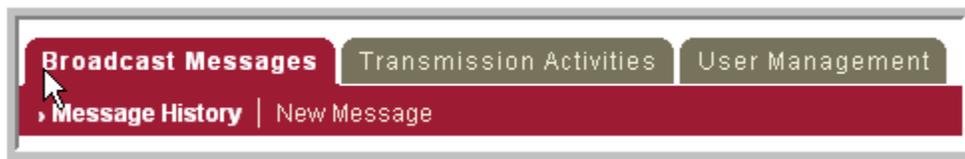
3. Make any necessary alterations in the correct field and then select [Update](#)

4.4 iMAX Administrator Broadcast Messages

Only TRACS Administrators are able to access the following functionalities.

4.4.1 Message History

1. Select the Broadcast Messages tab and Message History sub tab.



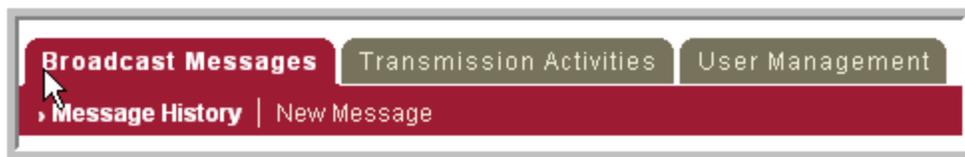
2. The system displays a list of administrative messages broadcasted in the past 30 days with date information. It is ordered by date time, the most recent message is the first to be displayed.

Date	Message ID	Message
May 8, 2008	32	The iMAX system will be offline from 10:00pm to 2:00am EST.

3. Click on the Next link to proceed to earlier messages.
4. Click on the Previous link to process to later messages.

4.4.2 New Message

1. Select the Broadcast Messages tab followed by the New Messages sub tab.



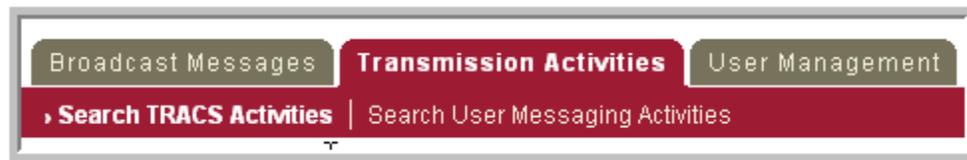
2. Enter the new broadcast message content into the text area.
3. Select
4. The system sends the new broadcast message to every iMAX user account.

4.5 iMAX Administrator Transmission Activities

4.5.1 Search TRACS Activities

This function allows the Administrator to search and find specific user activities.

1. Select the Transmission tab followed by the Search TRACS sub tab.



2. The system will display a list of search criteria including TRACSMail ID, Start Date, End Date, Transaction ID, Destination, Type, Status, and Order By.

 A screenshot of the search criteria form. It contains several input fields and dropdown menus:

TRACSMail ID	<input type="text"/>
Start Date	<input type="text"/> 
End Date	<input type="text"/> 
Transaction ID	<input type="text"/>
Type	<input type="text"/> 
Status	<input type="text"/> 
Order By	<input type="text"/> 

3. Fill in the search criteria as needed. None of the listed criteria categories is necessary to conduct a search.
4. The system switches to Transmission Activities tab and TRACS Results sub tab.
5. The page will display activity search results with up to two tables depending on results retrieved, one for MAT file request result and one for TRACS response table.
6. Click on the Next or Previous links to see previous or later messages.

4.5.2 Search User Messaging Activities

1. Select the Transmissions tab followed by the Search User Messaging Activities sub tab. The following screen will appear:

2. In order to conduct the search, the administrator must provide the From ID, To ID, or Transaction ID.

3. Providing the Start Date and End Date allows the system to search for specific messages. To do so, click on the Calendar icons next to field and select the appropriate date.

4. The system allows the administrator to sort the search by means of Date, From ID, To ID, or Transaction ID. To choose, click on the drop-down menu next to the Sort Column field.

4. Select

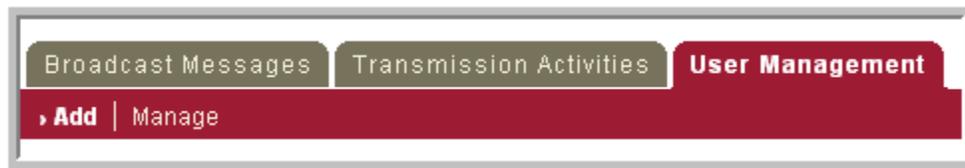
4. A screen with the search results will appear, allowing the administrator to choose which specific result to open.

User Message Search Results							New Search
From ID:	To ID:	Start Date:	End Date:	Transaction ID:	Sort Column:		
TRACX15692	TRACX15692	11/09/2007	--	--	Date		
Transaction ID	From	To	Subject	Received Date	Attachement		
TIN050820080000163	TRACX15692	TRACX15692	imax2	2008-05-08 15:01:14 EDT	TIN050820080000163.txt		
TIN050820080000162	TRACX15692	TRACX15692	imax	2008-05-08 15:00:45 EDT	TIN050820080000162.txt		
TIN050720080000156	TRACX15692	TRACX16004	4	2008-05-07 13:52:23 EDT	TIN050720080000156.txt		

4.6 iMAX Administrator User Management

4.6.1 Add User

1. Select User Management tab and Add sub tab.



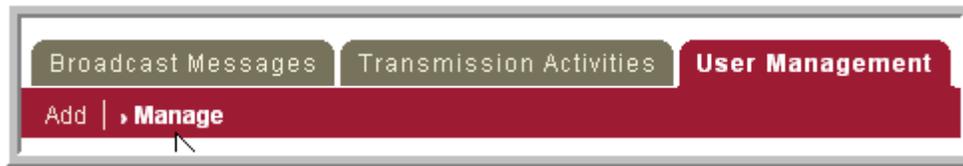
2. Enter the TRACSMail ID, Password, Contact Name, and other mandatory user profile information into the system.

TRACSMail ID	<input type="text"/>
Password	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Description	<input type="text"/>
Title	<input type="text"/>
Organization	<input type="text"/>
Address	<input type="text"/>
Telephone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>

3. Select **Create**
4. The system displays confirmation for the creation of a new user.

4.6.2 Manage

1. Select the User Management tab followed by the Manage sub tab.



2. Enter the TRACSMail ID in the allotted field. If the TRACSMail ID is not known, the administrator can still conduct the search based on the User's first or last name, or his or her organization.
3. The Sort Column field provides a drop down menu that allows the administrator to have the search results presented based on the TRACSMail ID or the User's first or last name.

TRACSMail ID	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Organization	<input type="text"/>
Sort Column	TRACSMail ID <input type="button" value="v"/>

3. Select **Search**

4. The following screen appears:

User Search Results								New Search
TRACSMail ID:	First Name:	Last Name:	Organization:	Sort Column:				
TRACX15692	--	--	--	TRACSMail ID				
TRACSMail ID	First Name	Last Name	Status	Edit	Reset Password	Deactivate	Reactivate	
TRACX15692	HTRACX15692	GTRACX15692	active					

5. While the screen provides the User's TRACSMail information, it also allows the administrator to Edit the user's profile, reset the user's password, or deactivate the user. To access these screens, simply click on the icon under the desired destination.
6. To edit the user's profile, click on the Pencil icon underneath the header "Edit."

7. To reset the user's password, click on the white and green arrow icon underneath the header "Reset Password."
8. To deactivate the user, click on the "X" icon underneath the header "Deactivate."

4.6.2.1 Edit

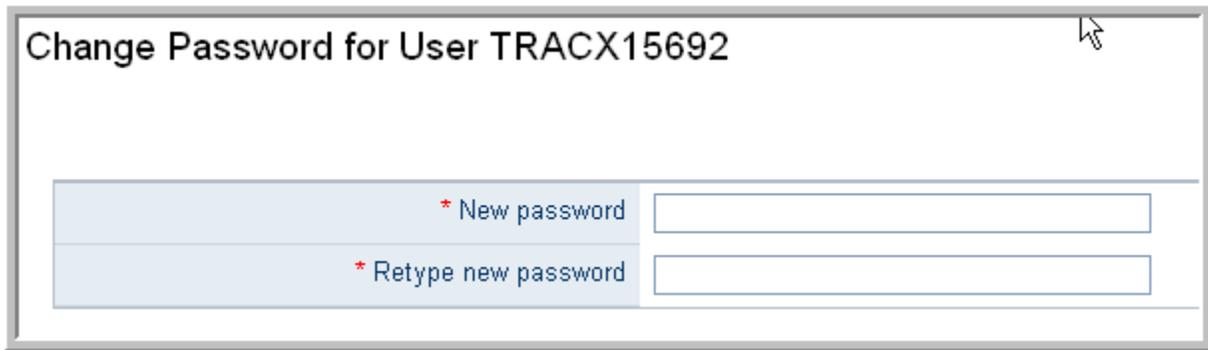
1. Selecting the Pencil icon underneath the "Edit" header allows the administrator to access the following screen:

Edit User TRACX15692	
First Name	<input type="text" value="Joe"/>
* Last Name	<input type="text" value="Smith"/>
Description	<input type="text"/>
Title	<input type="text" value="Building Manager"/>
Organization	<input type="text" value="Nunday Villa Apts"/>
Address	<input type="text" value="555 Main Street"/>
Telephone	<input type="text" value="15550000"/>
Fax	<input type="text"/>
Email	<input type="text" value="nundayvilla@aol.com"/>

2. The admin may then make any necessary changes to the user's profile in the required fields.
3. Click

4.6.2.2 Reset Password

1. Selecting the white and green arrow icon underneath the "Reset Password" header allows the administrator to access the following screen:



Change Password for User TRACX15692

* New password

* Retype new password

2. Type in the user's new password and then retype it in the required fields.

3. Select **Change Password**

4.6.2.3 Deactivate

1. Selecting the "X" icon beneath the Deactivate header to deactivate the user.

2. The administrator will be asked "Are you sure you want to deactivate User TRACSXxxxxx." Select "OK" if this is the case. If the administrator does not want to deactivate the user, select "Cancel." The following screen will then appear:



User Management Confirmation

[Back to Search Results](#)

iMAX user 'TRACX16004' has been successfully deactivated.

4.7 Special Instructions for Error Correction

There are no special instructions needed for error corrections. The system will prompt the user when an error occurs in the data entry. The user will need to correct the error before the system will proceed.

4.8 Caveats and Exceptions

There are no caveats or exceptions applicable to iMAX.

5.0 USING THE SYSTEM (BATCH)

5.0 USING THE SYSTEM (BATCH)

iMAX does not have a batch process that is part of the user experience. iMAX does have a batch process to package all uploaded files for TRACS and to retrieve any TRACS responses. The user interface instructions for viewing files uploaded or received is listed in Section 4.

6.0 QUERYING

6.0 QUERYING

6.1 Query Capabilities

Please refer to Section 4 in regards to the query capabilities of the iMAX system.

6.2 Query Procedures

Please refer to Section 4 in regards to the query procedures of the iMAX system.

7.0 REPORTING

7.0 REPORTING

7.1 Report Capabilities

Please refer to Section 4 in regards to the reporting capabilities of the iMAX system

7.2 Report Procedures

Please refer to Section 4 in regards to the reporting procedures of the iMAX system