

## IDT - Interdepartmental Transaction Request Instructions Through SAR

Updated March 19, 2009

1. Login to SAR. MyPack Portal, For Faculty & Staff, Security Access/SAR, SAR (System Access Request).
2. From the menu, choose Update Access.
3. Enter the last name or HR employee id number of the person for whom access is being requested, and check the appropriate button. When employee name(s) appear in the list, highlight the appropriate name and click on Continue.
4. On the Select Account page, scroll down and highlight the Financial application. Then click on Continue.
5. At the top of the Update Access Financial Modifications page, verify the header information in regard to the employee's name, employee id number, department of employment, and Compliance Certification.
6. To request access for IDT - including IDT functional roles, IDT OUCs, or IDT approver groups - determine what the user will need. (Reminder: (a) All IDT OUCs are 6-digit only. (b) All IDT Approver Groups are directly linked to their corresponding IDT OUC number. (c) A user may be a Biller for some IDT OUCs and an Approver for others.)

Enter the request based upon one of these user scenarios.

- a. Employee will be a IDT Biller
  - b. Employee will be a IDT Biller and have Pre-Approved Biller access
  - c. Employee will be an IDT Approver
  - d. Employee will be a IDT Biller and an IDT Approver
  - e. Employee will be a IDT Biller, have Pre-Approved Biller access, and be an IDT Approver
  - f. Employee will be IDT Approver for one of four special departments
- Reminder:** These four approver roles do not require IDT OUCs or IDT Approver Groups.

**Note:** In the following instructions, each role will have the short description, which is what is seen and selected in SAR.

	<b><u>Short Description</u></b>
Example:	Enter IDT as Biller

\*\*\*\*\*

**A. To request access as a IDT Biller**

1. Biller access requires one Biller role and any number of 6-digit IDT OUCs that the user may need. Biller access allows the user to enter, copy, print, and delete IDTs.
2. To select the Biller role, on the **Financial Role Selection** tab select the **Enter IDT as Biller** role. Click on Check For Errors.
3. On the **Financial IDT OUC Selection** tab, key the first 2 or 3 numbers of the OUC I into the box provided and click Search OUC. The display will only have 6-digit OUCs because IDT OUC access can only be 6-digit. Select the desired OUC access.

**B. To request access as a IDT Pre-approved Biller**

1. In order to have the Pre-approved Biller access, the user must have the Biller role and IDT OUCs. (see instructions section A above) Pre-approved Biller access allows the biller to access the Pre-Approval flag.
2. On the **Financial Role Selection** tab select the role **Mark IDT as Pre-Approved** . Click Check For Errors. If you have not already selected the biller role, a message will display “Please select the role **Enter IDT as Biller**” because the biller role has to be selected along with the pre-approved biller role.
3. On the **Financial IDT OUC Selection** tab, key the first 2 or 3 numbers of the OUC I into the box provided and click Search OUC. The display will only have 6-digit OUCs because IDT OUC access can only be 6-digit. Select the desired OUC access.

**Note: If for some reason you choose to remove the Enter IDT as Biller role, the Mark IDT as Pre-Approved role must also be removed or the same message will display and the SAR request cannot be completed.**

**C. To request access as a IDT Campus Approver**

Campus approver access requires: (1) an IDT approver role, (2) a customer IDT work list role, (3) IDT OUCs, and (4) IDT approver groups for each IDT OUC for which the user is an approver.

- a. The Update IDT as Approver role gives the user the ability to update charge-to data and also allows the user to print.
- b. The Approve IDT Customer Wklst role is a workflow role that allows a user to approve or recycle IDTs at the customer level.
- c. The IDT Approver Group xxxxxx roles are routing roles. The users

who have these roles, will receive notification when an action, initiated by other users, needs to be approved. When access is requested, the xxxxxx has to be replaced by the 6-digit OUC of the approver group.

1. On the **Financial Role Selection** tab, select the **Update IDT as Approver** and **Approve IDT Customer Wklst** roles. Click on **Check For Errors**. If either role is omitted a message “Please select the role xxxxxxxx” will be displayed as a reminder.
2. IDT OUCs must now be selected. Click on the **Financial IDT OUC Selection** tab. . Enter a single 6-digit OUC or partial OUC and click **Search OUC**. The display will only have 6-digit OUCs, because IDT OUC access can only be 6-digit. Select the IDT OUC(s) needed.
3. IDT Approver Groups must now be selected for every IDT OUC for which the user is to be an approver. Go to the **Financial Approver Groups** tab to the section of the form which is listed as **Approver in IDT Groups**. To the right of this is the **IDT Approver Group search**. Enter the approver group name, or the last name of an approver, in the box, check the appropriate description and click the “Search” button. From the list provided, select the group(s) needed.

**D. To request access as a CALS Business Office IDT Approver (restricted to the CALS Business Office only)**

1. To request access to approve or recycle IDTs at the CALS Business Office level, the following access must be requested. This access is restricted to users in the CALS Business Office only. This access only requires the IDT Approver role and the CALS Office work list role.
2. On the **Financial Role Selection** tab, select the **Update IDT as Approver** and **Approve IDT CALS Office Wklst** roles. Click on **Check For Errors**. If either role is omitted a message “Please select the role xxxxxxxx” will be displayed as a reminder.

The **Approve IDT CALS OfficeWklst** role is a workflow role that allows a user to approve or recycle IDTs at the CALS Business Office level.

**E. To request access as a Budget Office IDT Approver (restricted to Budget Office only)**

1. To request access to approve or recycle IDTs at the Budget Office level, the following access must be requested. This access is restricted to users in the Budget Office only. This access only requires the IDT Approver role and the Budget Office work list role.
2. On the **Financial Role Selection** tab, select the **Update IDT as Approver** and **Approve IDT Budget Ofc Wklst** roles. Click on **Check For Errors**. If either role is omitted a message “Please select the role xxxxxxxx” will be displayed as a reminder.

The Approve IDT Budget Ofc Wklst role is a workflow role that allows a user to approve or recycle IDTs at the Budget Office level.

**F. To request access as a Controller's Office IDT Approver (restricted to the Controller's Office only)**

1. To request access to approve or recycle IDTs at the Controller's Office level, the following access must be requested. This access is restricted to users in the Controller's Office only. This access only requires the IDT Approver role and the Controller's Office work list role.
2. On the **Financial Role Selection** tab, select the **Update IDT as Approver** and **Approve IDT CNTRLR Ofc Wklst** roles. Click on Check For Errors. If either role is omitted a message "Please select the role xxxxxxxx" will be displayed as a reminder.

The Approve IDT CNTRLR Ofc Wklst role is a workflow role that allows a user to approve or recycle IDTs at the Controller's Office level.

**G. To request access as a Foundations Accounting IDT Approver (restricted to the Foundations Accounting & Investments Office only)**

1. To request access to approve or recycle IDTs at the FAI Office level, the following access must be requested. This access is restricted to users in the Foundations Accounting & Investments Office only. This access only requires the IDT Approver role and the FAI Office work list role.
2. On the **Financial Role Selection** tab, select the **Update IDT as Approver** and **Approve IDT FAI Office Wklst** roles. Click on Check For Errors. If either role is omitted a message "Please select the role xxxxxxxx" will be displayed as a reminder.

The Approve IDT FAI Office Wklst role is a workflow role that allows a user to approve or recycle IDT's at the FAI Office level.

If you have any questions, please contact the Solutions Center at 513-1178 or via email at [OIT\\_SC](#).