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Getting Started

- Log into the mypack portal (mypack.ncsu.edu) with your UnityID and password
- Click the Faculty & Staff tab at the top of your screen
- In the Campus Resources box on the left side of your screen, you will find SAR under Security Access

*In the training class* use the training website: https://eptrn.acs.ncsu.edu

Log in to the Portal as you normally would with your UnityID and Password.
In the navigation box on the left side, click, SAR-Training

SAR Main Menu

* The View Inbox option is only available for Approvers. The link will only appear when there are requests requiring approval.
* The Delegate Capabilities option is not available to everyone on the SAR system.

Getting Help

You will find a link to our support documentation at the bottom of every SAR screen.
Getting Started

**SAR Approver Lookup**

The SAR Approver Lookup link appears at the bottom of the SAR screen at all times. The Approver Lookup feature is helpful when you want to know who in a particular department can approve/reject requests. Approvers can make requests which means they are also Requestors (though Requestors are not necessarily Approvers). Click this link to view a list of Approvers for a certain Dept/College. You will need at least the first 2 digits of the Dept/College OUC number or the last name of an Approver to conduct a search.

![SAR Approvers](image)

**Discussion**

The Budget Office maintains an MS Excel spreadsheet of OUC numbers and their corresponding units on their website. The link is on their Topics A to Z page and is listed as “OUC-Current List (Excel)”. You could also search the NC State website for “OUC List”.

**User Selection**

The User Selection screen follows the update access, revoke access or delegate capabilities command from the main menu. This screen allows you to search and select the employee for which access will be given, revoked, or delegated by ID or last name. Only one employee name can be selected per request.
1. Choose to **Search By** either last name or employee ID by clicking the appropriate buttons.
2. Enter the appropriate information in the **Search Criteria** field. Then click Search.
3. Click on the desired user name in the **Select User** box.
4. Click **Continue**.
   - The red "**" indicates a required field. You must select a name from the Select User box before continuing.
Application Selection

If you are updating or revoking access, you must select the application from the Account Selection screen. Be sure to scroll through the list of application names. Some applications names are listed differently than they were in the past with ASAP.

1. Scroll to find the desired application name in the Select Account box.
2. When you find the name, click it.
3. Click Continue.

TIP! To quick move through the list of applications, click in the Select Account box, then type the first letter of the application name to move to that section of the list.

Note: Use only the navigations buttons such as “Continue” and “Back” from the SAR screen. Avoid using the “Back” button on your browser.

Error

You can only have one open request per person per application at a time. For example, if you made a request for John Doe to have access to certain roles in Human Resources (HR). You can not issue another request for John Doe in HR until the first request is complete. The error message will state:

An existing request is in process for this account. The existing request must be completed before you can continue. Please select another account or cancel this request.
Update Access/Add a Request Overview

General Process
When adding a request, the first screen of any application provides the same type of information (see image below). For some applications, this is the only screen. For others, it represents the first in a series of tabbed screens.

Compliance Certification
A signed Compliance statement must be on file before any request will be approved.

Modify Effective Date
SAR allows you to determine the effective date of the current request.
1. Click the Modify Effective Date check box
2. Enter the date in MM/DD/YYYY format or click the calendar icon to select a date from a pop-up calendar window. Remember the effective date must be between 2 and 30 days of the request date.
3. Choose the exact hour and minutes in the Effective Time fields.
Comments
For some applications the comments section should include details about the type of access requested. Other applications comments are not required. This section could be used to relay information to the approvers that will help move the process along.

Process for Multi-Tabbed Applications
Some applications like Human Resources, Financial and Students (SIS) require a series of steps to complete the request process. These applications usually appear with multiple tabs including:
- Request Details
- Role Selection
- OUC Selection

Request Details
This information on this tab matches that of the screen on the previous page and allows for an effective date and comments.

![Update Access Financial Modifications](image)

After reviewing/modifying the Request Details tab, click the Role Selection tab.
Role Selection
The role section tab is used to assign roles to a user. The types of roles selected on this tab determine how many additional tabs appear on your screen.

The user will have access to any roles in the **Selected** column. To move roles from the **Available** column to the **Selected** column, see the chart below.

- Double-click any role to move it from one column to the other
- OR-
- To highlight a role, click it once, then use the arrows buttons as described in the chart below.
- To highlight multiple roles, hold down the control key before clicking each role, then use the arrow buttons as described in the chart below.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;</td>
<td>Move highlighted role(s) from the “<strong>Available</strong>” column to the “<strong>Selected</strong>” column</td>
</tr>
<tr>
<td>&lt;</td>
<td>Move highlighted role(s) from the “<strong>Selected</strong>” column to the “<strong>Available</strong>” column</td>
</tr>
<tr>
<td>&gt;&gt;</td>
<td>Move all the roles from the “<strong>Available</strong>” column to the “<strong>Selected</strong>” column</td>
</tr>
<tr>
<td>&lt;&lt;</td>
<td>Move all the roles from the “<strong>Selected</strong>” column to the “<strong>Available</strong>” column</td>
</tr>
</tbody>
</table>
View Role Description ....

To view a description of any role, click to select one role from the Available column then click the View Role Long Description button. The image below shows the description information for the role: Approve Actuals Journals.

![Image showing the description for Approve Actuals Journals]

The Check for Errors button appears on the Role Selection tab of a request. It will help you determine what needs to be done before the current request can be submitted. If anything else needs to be done to the request, it will appear in red writing beneath the tabs. It can be helpful to click the Check for Errors button before moving to the next tab.
OUC Selection

It is usually necessary to indicate which OUC the selected roles should apply.

- If you already know the OUC to use, type it in the field to the right of the Add OUC button, then click “Add OUC”.
- If you don’t know the exact OUC number you can search for it by typing in part or all of the OUC number and clicking, Search OUC. A list of OUCs that match your criterion appear in the OUC List.
- Double-click an OUC in the Available column to move it to the Selected column.

You may place multiple OUCs in the Selected column.

Discussion:
The screen shot above indicates that we want to apply some Human Resource roles (selected roles are not shown) to the Extension Technology Service, which is within, the College of Agriculture (CALS). Searching for “11” (the first 2 digits of the OUC for CALS, creates a list of OUC numbers beginning with 11 and their titles.

The Selected OUC table shown at the bottom of the screenshot shows that this person already had permissions to OUC 113706. In this table, you may modify the permission to prevent access to a specific OUC.

Submitting a Request

Once the request is complete, click the Preview Request button. SAR will first check for errors in the request. If there are no errors it will take you to a detailed summary page of the current request (see the right half of the image below). Under the Role Modification section, there is a listing of all added, removed and unmodified roles. Under the OUC Modification section, this is a listing of all added, removed and modified OUC numbers.

- Click the Back button (at the bottom of the screen, not the browser’s Back button) to edit the request.
- Click the Complete Request button to submit the request.

The Complete Request button submits the request and provides you with an almost duplicate summary page of the request but with the Request # (see the right side of the image below). Click Finished to return to the main menu.
Update Access/Add a Request
SAR puts all completed requests in the Inbox of those who can approve/reject the request. These people are referred to as Approvers. Approvers are sent an email notification when a request is waiting their action.
Update Access Confirmation

Please review the changes being made to this user. Click Back to make any additional changes, click Cancel to cancel the request or click Complete Request to finish submitting the request.

User Request Details

- User: BWHENRY - Henry, Brent W
- Employee Id: 00001056
- System Id: NA
- Organizations: 117519 - North Central District - Wake
- Email: bwhenry@apoll04.acs.ncsu.edu
- Compliance Certification: Completed
- Update Access on: Financial
- Effective Date: Immediate
- Comments: No Comments

Financial Role Modifications

- Added Financial Roles:
  - Approve Budget Journals
  - Approve IDT Customer Wbls
  - Update IDT as Approver
- Removed Financial Roles: **No Roles Removed**
- Unmodified Financial Roles:
  - Enter Travel Reimbursements
  - Inquiry Actuals & Budget Jbls

Route To Approver Group Modifications

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver Group 11</td>
<td>Approver Group 11</td>
</tr>
</tbody>
</table>

Financial Approver Group Modifications

- **No Approver Groups Added**

Financial Approver IDT Group Modifications

- **No Approver IDT Groups Added**

Financial OUC Modifications

- **No OUC Added**
- **No OUC Removed**
- **No Modified OUC**

Financial IDT OUC Modifications

- **No IDT OUC**
- **No IDT OUC Removed**
- **No Unmodified IDT OUC**

Unmodified OUC

- 117519: North Central District - Wake
- Transaction: Access
- Permission: Marketplace, Travel, Voucher

Complete Request | Back | Cancel
View Tasks/Search for Tasks

The View/Search for Tasks link on the main menu allows you to find specific requests. Not only can you review the details of a request, but you can also track the status of the request.

From the **Selection Method** field, SAR provides several methods for searching for a request (see image below). Once a selection is made the resulting requests appear immediately in table form. Click the **View** button for the request you want to see (see second image).

NOTE: The table created from the Selection Method can be filtered and sorted. The **Filter Selection By Status** field will reduce the number of rows in the resulting table (see image below).
The **Task Details** tab provides a few brief details about the request including a record of all actions towards the completion of this request.

<table>
<thead>
<tr>
<th>Task Actions</th>
<th>Date</th>
<th>User</th>
<th>Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008-05-20 10:14:30.0</td>
<td>JFOSTER - Foster, John J</td>
<td>Request Submitted</td>
<td>No Comments</td>
</tr>
<tr>
<td></td>
<td>2008-05-21 10:46:03.0</td>
<td>CMRICCHAR - Richardson, Carolyn M</td>
<td>Internal OUC DVC Approved</td>
<td>test</td>
</tr>
<tr>
<td></td>
<td>2008-05-21 10:52:54.0</td>
<td>TWISE - Wise, Tracey Ann</td>
<td>Approver Group: NCS CAMPUS AD ROW LEVEL UGRD Approved</td>
<td>No Comments</td>
</tr>
</tbody>
</table>
Required Approvals Tab

The **Required Approval** tab outlines the approval flow in a series of steps. Each step contains a list of people (Approvers) who can approve the request at that level. When one approver in a step marks the request “Approved”, the request is sent to all the approvers in the next step. The process repeats itself until it has been approved at each. Once a request has passed through all steps, the original requestor is sent an email notification that the request is complete.

If an approver denies a request, the request stops its progress through the steps and an email notification is sent to original requestor, usually with comments of explanation.

At any time a requestor may use the View tasks link on the SAR main menu to track the progress of a request.
User Details Tab

The **User Details** tab provides a brief summary of information about the person for which access has been requested (see image above).
Access Modifications Tab

The **Access Modifications** tab provides a summary of the details of the request.
Approving or Rejecting a Request

A user must be given the role of “Approver” to approve/reject requests. Approvers will the see the View Inbox link on the SAR main menu if there are requests that need attention. The inbox provides a list of requests waiting arranged in a table. This list can be sorted by clicking the table’s column headings. To select a request click the link in the Request column.

Awaiting Approval

Please click the link to approve or reject the request. To sort the request list, click a column title.

<table>
<thead>
<tr>
<th>Approver</th>
<th>Request</th>
<th>Requester</th>
<th>Date of Request</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RENO</td>
<td>Approve 707 - Update Access on SIS - JLCABLE - Cable, Jeffery L - 2008-08-29 01:44:12</td>
<td>AWILLIA</td>
<td>Fri Aug 29 13:45:07 EDT 2008</td>
<td>test SIS</td>
</tr>
</tbody>
</table>

Important notes about Approvers:

- Approvers cannot approve requests created for them
- Approvers cannot approve requests they create
A summary of the request is provided followed by buttons to Approve, Reject or Cancel (see image below).

<table>
<thead>
<tr>
<th>Financial Approver IDT Group Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added Financial Approver IDT Groups</td>
</tr>
<tr>
<td>Removed Financial Approver IDT Groups</td>
</tr>
<tr>
<td>Unmodified Financial Approver IDT Groups</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial OUC Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added Financial OUC</td>
</tr>
<tr>
<td>Removed Financial OUC</td>
</tr>
<tr>
<td>Modified Financial OUC</td>
</tr>
<tr>
<td>Unmodified Financial OUC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial IDT OUC Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added Financial IDT OUC</td>
</tr>
<tr>
<td>Removed Financial IDT OUC</td>
</tr>
<tr>
<td>Unmodified Financial IDT OUC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task Actions</th>
<th>Date</th>
<th>User</th>
<th>Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008-05-16 13:00:31</td>
<td>RYWHITE - White, Richard Y</td>
<td>Request Submitted</td>
<td>No Comments</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Comments</td>
</tr>
</tbody>
</table>

Discussion:
The image above only displays the bottom half of the OUC approval screen.

Notice the Comments field at the bottom of the screen. Comments are required if the Approver rejects a request. These comments should indicate the reason for rejection.

Notifications of approved and rejected requests are sent via email to the author of the request. A rejected request can be re-submitted with changes and corrections.
Changing a Request

Once a request is submitted, it can only be modified after an Approver rejects it. When a request is rejected, SAR sends an email notification to the requestor. The rejected request can be found using the View Tasks link on the SAR main menu (see the View Tasks section of this document).

When viewing a rejected task, select the **Resubmit Selected Task** button. SAR will display the request in the same format as when the request was created (see the Update Access section of this document). All the details of the request remain to allow you to make corrections as needed.
Revoking Access to an Application

- Choose Revoke Access from the SAR Main Menu
- Select the user from whom access should be revoked

The Assigned Accounts column lists all the applications available to the selected user. Revoke access to an application by moving that application into the Accounts to Revoke column.

The Modify Effective Date checkbox allows you to determine when the access should be revoked. You must choose a date between 2 and 30 days of the request.

The Comments section may be used to convey any helpful information pertaining to this action. Comments can be viewed by anyone who views this task.

Discussion

It is important to note that the Revoke access task takes away a user’s access to that entire application. If you simply need to take away someone’s access to a particular OUC for an application, you should use the Update Access option from the SAR main menu.

The screen that follows provides a summary of the revoke access request. Clicking the Continue/Submit button submits the action and takes you to another summary screen that provides the request ID# for this task.
Delegate Capabilities

The Delegating Capabilities feature allows a user to give his or her approver/requester status to someone else. This would be used, for example, if an approver/requester is going on leave and need someone else to cover these responsibilities.

- Select Delegate Capabilities * from the SAR main menu.
- Select a person who has been trained to use SAR.
- **Top** must be given in addition to selected OUC(s)

Allow Delegation checkbox gives the delegate the ability to delegate capabilities to others.

*This feature is not available to all SAR users.*
Non-role SIS Security includes:

**Careers and Programs**- Administrative access to VIEW student academic information is controlled by the student's academic Career (e.g. Undergraduate, Graduate) and Program. Programs are what students are admitted into and cleared to graduate from and are equivalent to colleges for undergraduate students and to academic programs for graduate students.

**Plans**- Administrative access to UPDATE student academic information is controlled by the student's academic plan. Plans are equivalent to student majors.
Orgs- Administrative access to UPDATE class section information is controlled by academic organizations, which are equivalent to departments and colleges. Orgs do not control access to student data - only access to class/course data.

Enrollment Security- Enrollment security controls administrative drop/add access. Enrollment access groups map to academic departments, and control which courses can be added and overridden to a student's schedule.
ClassEval

ClassEval Department Head Role

It is necessary to indicate which OUC the employee should have access.

- If you already know the OUC to use, type it in the field to the right of the Add Six Digit OUC button, then click “Add Six Digit OUC”.
- If you don’t know the exact OUC number you can search for it by typing in part or all of the OUC number and clicking, Search Six Digit OUC. A list of OUCs that match your criterion appear in the OUC List.
- Double-click an OUC in the Available column to move it to the Selected column.

You may place multiple OUCs in the Selected column.

Discussion:
The screen shot above indicates that we want to allow access to some OUCs in the Agricultural & Extension Education department, which is within the College of Agriculture (CALS). Searching for “11” (the first 2 digits of the OUC for CALS, creates a list of OUC numbers beginning with 11 and their titles.) The selected OUCs will be the departments for which the person will be able to see class evaluations.

Submitting a Request

Once the request is complete, click the Preview Request button. SAR will first check for errors in the request. If there are no errors it will take you to a detailed summary page of the current request (see the right half of the image below). Under the Access Modification section, this is a listing of all added, removed and modified OUC numbers.

- Click the Back button (at the bottom of the screen, not the browser’s Back button) to edit the request.
- Click the Complete Request button to submit the request.

The Complete Request button submits the request and provides you with an almost duplicate summary page of the request but with the Request # (see the right side of the image below). Click Finished to return to the main menu.