

NC STATE UNIVERSITY



SAR Training



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Getting Started

- Log into the mypack portal (mypack.ncsu.edu) with your UnityID and password
- Click of 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

Logged in as: AWILLIA LOGOUT	
Welcome, AWILLIA. Make a selection to manage your work items, requests, or delegations.	
View Inbox	- Approve Pending Requests
Update Access	- Add a Request
Revoke Access	- Revoke access to any/ALL applications
Delegate Capabilities	- Modify Approver Table
View / Search for Tasks	- Search for Specific Requests

[SAR Approver Lookup](#) [Help](#)

* 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.

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 as 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

[Close Window](#)

Dept/College: And/Or
Last Name:

Find First 1-10 of 10 Last		
Name	Department / College	Description
Richardson, Carolyn M	11	College Of Agriculture & Life
Cross, Michael Trembley	11	College Of Agriculture & Life
Elias, Joyce Ann	11	College Of Agriculture & Life
O'Brien, Patricia A	11	College Of Agriculture & Life
Martin, Joy K	11	College Of Agriculture & Life
Cross, Michael Trembley	1101	Cals-Dean's Office & Staff
Martin, Joy K	1103	Agricultural Research Service
Anderson, Alice Kay	1107	Animal Science
Elias, Joyce Ann	1109	Crop Science
Brandt, Jon A	1180	Cals-Dept Of Agri & Resource E

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.

Logged in as: CMRICHAR [LOGOUT](#)

Update Access User Selection

Use the search engine below to find a user Last Name or Employee ID.

Search By

☒ Last Name ☐ Employee ID

Search Criteria

henry *

Search

Select User

Select

Henry, Brent W - BWHENRY - 000001564
Henry, Holly Jean - HJHENRY - 000782719
Henry, Meredith A - MAHENRY - 000204401

Continue

Cancel

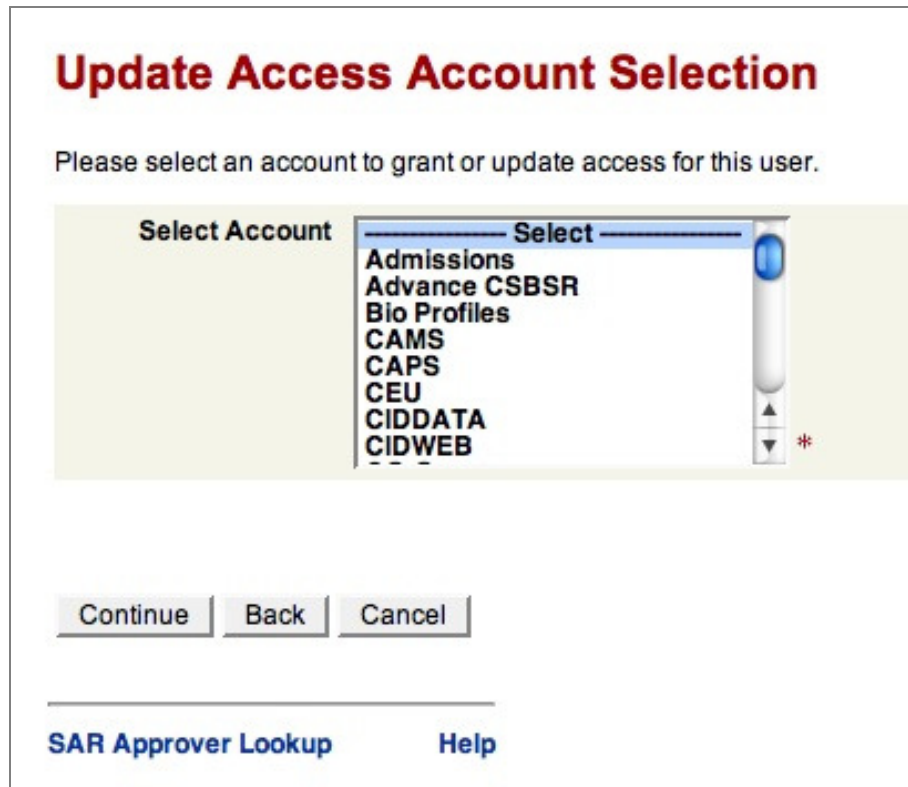
* indicates a required field

[SAR Approver Lookup](#) [Help](#)

1. Choose to **Search By** either last name or employeeID 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.



Update Access Account Selection

Please select an account to grant or update access for this user.

Select Account

Select

- Admissions
- Advance CSBSR
- Bio Profiles
- CAMS
- CAPS
- CEU
- CIDDATA
- CIDWEB

Continue Back Cancel

[SAR Approver Lookup](#) [Help](#)

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.

Update Access Account Modifications

Please enter instructions on how to create the account selected.

User	BWHENRY Henry,Brent W
Employee Id	000001564
Sybase Id	NA
Organizations	117519 - North Central District - Wake
Email	bwhenry@apollo4.acs.ncsu.edu
Compliance Certification	Completed
Update Access on	CEU
Modify Effective Date	<input checked="" type="checkbox"/>
Effective Date	<input type="text"/>  2 - 30 Days: MM/DD/YYYY Format
Effective Time	<input type="text"/> :00 <input type="text"/> :00
Comments	<input type="text"/>
<input type="button" value="Preview Request"/> <input type="button" value="Cancel"/>	



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
Please select the role and ouc access you would like to grant or remove for this user.
000001564 - BWHENRY - Henry,Brent W

Request Details

Financial Role Selection

Financial OUC Selection

User BWHENRY Henry,Brent W

Employee Id 000001564

Sybase Id NA

Organizations 117519 - North Central District - Wake

Email bwhenry@apollo4.acs.ncsu.edu

Compliance Certification Completed

Update Access on Financial

Modify Effective Date ☐

Effective Date Immediate

Comments

Preview Request

Cancel

[SAR Approver Lookup](#) [Help](#)

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.

Update Access Financial Modifications

Please select the role and ouc access you would like to grant or remove for this user.

000001564 - BWHENRY - Henry,Brent W

Request Details Financial Role Selection **Financial OUC Selection**

Check For Errors

Campus Roles	Available		Selected
<div>View Role Long Description *</div>	Approve Actuals Approve Budget Journals Approve IDT Customer Approve MarketPlace Approve Requisitions Approve Requisitions	<div>></div> <div><</div> <div>>></div> <div><<</div>	Basic Inquiry and Query Access Enter Travel Reimbursements Inquiry Actuals & Budget Jnls





Route To Approver

☒ Last Name
 ☐ Approver Group

* Select a single Role to view the long description. Do not select more than one role.

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.

	>	Move highlighted role(s) from the “ Available ” column to the “ Selected ” column
	<	Move highlighted role(s) from the “ Selected ” column to the “ Available ” column
	>>	Move all the roles from the “ Available ” column to the “ Selected ” column
	<<	Move all the roles from the “ Selected ” column to the “ Available ” column

View Role Description

View Role
Long 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.

Role Description: Approve Actuals Journals [Close Window](#)

Workflow role that allows a user to approve Actuals journal entries at the college level.

Not the role you were looking for? Search for additional roles by entering any part of the role name and selecting 'Get Role Descriptions'.

[Get Role Descriptions](#)

Application	Description	Role Long Description
	Approve Actuals Journals	

Check For Errors

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.

Request Details Financial Role Selection **Financial OUC Selection** Financial Approver Groups

[Please select the role Update IDT as Approver]

Check For Errors

Campus Roles	Available		Selected
View Role Long Description *	Approve Actuals	>	Approve Budget Journals
	Approve MarketPlace	<	Approve IDT Customer Wklt
	Approve Requisitions	>>	Basic Inquiry and Query Access
	Approve Requisitions	<<	Enter Travel Reimbursements
	Approve Vouchers		Inquiry Actuals & Budget Jrnls
	AR Non Stu Rnt Distrib-		

OUC Selection

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

Request Details | **HR Role Selection** | HR OUC Selection

Enter OUC Search OUC Enter OUC Add OUC

OUC List Available

11 : College Of Agriculture	>
110101 : Cals-Dean'S	<
110103 : Aa Sals	>>
110104 : Academic	<<
110140 : Academic Affairs	
110199 : Agriculture	

Selected

113706 : Extension Technology Service

Selected OUC

OUC	Permission
113706	<input checked="" type="radio"/> Access <input type="radio"/> No Access

Preview Request Cancel

- 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 with-in, 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	000001564
Sybase Id	NA
Organizations	117519 - North Central District - Wake
Email	bwhenry@apollo4.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 Wklist Update IDT as Approver
Removed Financial Roles	** No Roles Removed **
Unmodified Financial Roles	Enter Travel Reimbursements Inquiry Actuals & Budget Jnlis

Route To Approver Group Modifications

Route To Approver Group	Before	After
	Approver Group 11	Approver Group 11

Financial Approver Group Modifications

Added Financial Approver Groups	** No Approver Groups Added **
Removed Financial Approver Groups	** No Approver Groups Removed **

Financial Approver IDT Group Modifications

Added Financial Approver IDT Groups	** No Approver IDT Groups Added **
Removed Financial Approver IDT Groups	** No Approver IDT Groups Removed **
Unmodified Financial Approver IDT Groups	** No Unmodified Approver IDT Groups **

Financial OUC Modifications

Added Financial OUC	** No OUC Added **								
Removed Financial OUC	** No OUC Removed **								
Modified Financial OUC	** No Modified OUC **								
Unmodified Financial OUC	<table><tr><th>OUC</th><th>Transactions</th></tr><tr><td>117519: North Central District - Wake</td><td><table><tr><th>Transaction</th><th>Permission</th></tr><tr><td>MarketPlace, Travel, Voucher</td><td>Access</td></tr></table></td></tr></table>	OUC	Transactions	117519: North Central District - Wake	<table><tr><th>Transaction</th><th>Permission</th></tr><tr><td>MarketPlace, Travel, Voucher</td><td>Access</td></tr></table>	Transaction	Permission	MarketPlace, Travel, Voucher	Access
OUC	Transactions								
117519: North Central District - Wake	<table><tr><th>Transaction</th><th>Permission</th></tr><tr><td>MarketPlace, Travel, Voucher</td><td>Access</td></tr></table>	Transaction	Permission	MarketPlace, Travel, Voucher	Access				
Transaction	Permission								
MarketPlace, Travel, Voucher	Access								

Financial IDT OUC Modifications

Added Financial IDT OUC	IDT OUC 110101: Cals-Dean'S Office & Staff 110102: Dean'S Office - Cals
Removed Financial IDT OUC	** No IDT OUC Removed **
Unmodified Financial IDT OUC	** No Unmodified IDT OUC **

[Complete Request](#) [Back](#) [Cancel](#)

Request 811 - Update Access on Financials - BWHENRY - Henry, Brent W - 2008-08-15 01:29:20 Submitted

[End Request - Return to Main Menu](#)

[View Task Status](#)

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).

Use a Selection Method to find and view the details of a task.

Search for Tasks

Selection Method -- Select --

Filter Selection By Status -- Select --

Sort By -- Select --

Sort Direction -- Select --

Search for Tasks

Selection Method List Requests Approved By Me

Filter Selection By Status In Process

Sort By ☒ Submit Date ☐ Requestor ☐ Requestee ☐ Account ☐ Request Type ☐ Status

Sort Direction ☐ Descending ☒ Ascending

Select	Id	Request Type	Accounts	Requestor	Requestee	Status	Submit Date	Complete Date
View	174	UpdateAccessSIS	SIS	JJFOSTER	CCJONES3	In Process	2008-05-20 10:14:30.0	
View	624	UpdateAccessGeneric	Housing	CMRICHAR	CKLAUDER	In Process	2008-07-14 14:57:51.0	
View	650	UpdateAccessHR	HR	CMRICHAR	JAHACKET	In Process	2008-07-16 16:54:19.0	

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).

Search for Tasks

Selection Method -- Select --

Filter Selection By Status -- Select --

Sort By -- Select --

Sort Direction -- Select --

Task Details Tab

Task Details

Required Approvals

User Details

Access Modifications

Task Details

Task Name

174 - Update Access on SIS - CCJONES3 - Jones,Charlene Carol - 2008-05-20 10:14:29

Submit Date

2008-05-20 10:14:30.0

Complete Date

Effective Date

Immediate

Compliance Timeout

01/01/1970

Requestor

JJFOSTER Foster, John

Status

In Process

Application(s)

SIS

Sort By

☒ Ascending ☐ Descending

Task Actions

Date	User	Action	Comments
2008-05-20 10:14:30.0	JJFOSTER - Foster, John J	Request Submitted	No Comments
2008-05-21 10:46:03.0	CMRICHAR - Richardson, Carolyn M	Internal OUC DVC Approved	test
2008-05-21 10:52:54.0	TAWISE - Wise, Tracey Ann	Approver Group: NCS CAMPUS AD ROW LEVEL UGRD Approved	No Comments

The **Task Details** tab provides a few brief details about the request including a record of all actions towards the completion of this request.

Required Approvals Tab

Task Details	Required Approvals	User Details	Access Modifications
--------------	--------------------	--------------	----------------------

Approval Flow

Step 1

Approval Type Internal OUC DVC

Status Approved by CMRICHAR - Richardson, Carolyn M on 2008-05-21 10:46:03.0 - tesr

Approver CMRICHAR - Richardson, Carolyn M

Approver HLLINEBE - Lineberry, Harvey Lindley

Approver JK MARTIN - Martin, Joy K

Approver MTCROSS - Cross, Michael Trembley

Approver PAOBRIEN - O'Brien, Patricia A

Step 2

No approval types required

Step 3

Approval Type Approver Group: NCS CAMPUS AD ROW LEVEL UGRD

Status Approved by TAWISE - Wise, Tracey Ann on 2008-05-21 10:52:54.0 - No Comments

Approver MICHELLE - Johnson,Michelle Gray

Approver TAWISE - Wise, Tracey Ann

Step 4

No approval types required

Step 5

Approval Type Check Compliance

Status Pending

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

Task Details	Required Approvals	User Details	Access Modifications
User Details			
Request ID	174		
User	CCJONES3 Jones,Charlene Carol		
Employee Id	000925957		
Sybase Id	NA		
Organizations	117703 - Northeast District - Camden		
Email	ccjones3@apollo4.acs.ncsu.edu		
Compliance Certification	Not Completed		
Request Type	UpdateAccessSIS		
Account(s)	SIS		

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.

[Return to View Tasks](#)

Task Details

Required Approvals

User Details

Access Modifications

SIS Role Modifications

Added SIS Roles	SIS Admiss Campus Inquiry All SIS Admiss Summary Inq Campus Admissions-UGRD Cntrl Office Admissions-RRO
Removed SIS Roles	** No Roles Removed **
Unmodified SIS Roles	** No Unmodified Roles **

SIS Org Modifications

Added SIS Org	** No Org Added **
Removed SIS Org	** No Org Removed **
Modified SIS Org	** No Modified Org **
Unmodified SIS Org	** No Unmodified Org **

SIS Career Modifications

Added SIS Career	** No Career Added **
Removed SIS Career	** No Career Removed **
Modified SIS Career	** No Modified Career **
Unmodified SIS Career	** No Unmodified Career **

SIS Plan Modifications

Added SIS Plan	** No Plan Added **
Removed SIS Plan	** No Plan Removed **
Modified SIS Plan	** No Modified Plan **
Unmodified SIS Plan	** No Unmodified Plan **

[Finished - Return to Main Menu](#)

Approving or Rejecting a Request

A user must be given the role of “Approver” to approve/reject requests. Approvers will 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.

▼ Approver	Request	Requester	Date of Request	Description
RENO	Approve 709 - Update Access on CAMS - JMMACDO2 - Macdonald, Jeffrey M - 2008-08-29 01:54:51	AWILLIA	Fri Aug 29 13:55:31 EDT 2008	CAMS request
RENO	Approve 708 - Update Access on Financials - WLAING - Laing, Wendy - 2008-08-29 01:53:10	AWILLIA	Fri Aug 29 13:54:07 EDT 2008	No Comments
RENO	Approve 707 - Update Access on SIS - JLCABLE - Cable, Jeffery L - 2008-08-29 01:44:12	AWILLIA	Fri Aug 29 13:45:07 EDT 2008	test SIS
RENO	Approve 704 - Update Access on HR - CBSADLER - Sadler, Charles Brandon Thomas - 2008-08-29 11:43:04	AWILLIA	Fri Aug 29 11:43:46 EDT 2008	resubmit

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).

Financial Approver IDT Group Modifications

Added Financial Approver IDT Groups

** No Approver IDT Groups Added **

Removed Financial Approver IDT Groups

** No Approver IDT Groups Removed **

Unmodified Financial Approver IDT Groups

** No Unmodified Approver IDT Groups **

Financial OUC Modifications

Added Financial OUC

** No OUC Added **

Removed Financial OUC

** No OUC Removed **

Modified Financial OUC

** No Modified OUC **

Unmodified Financial OUC

** No Unmodified OUC **

Financial IDT OUC Modifications

Added Financial IDT OUC

** No IDT OUC Added **

Removed Financial IDT OUC

** No IDT OUC Removed **

Unmodified Financial IDT OUC

** No Unmodified IDT OUC **

Task Actions

Date	User	Action	Comments
2008-05-16 13:03:31.0	RYWHITE - White, Richard Y	Request Submitted	No Comments

Comments

No Comments

Approve

Reject

Cancel

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

Revoke Access Account Selection
Please select one or more accounts to revoke access for this user.

User	JBONES9 Jones, J Beth	
Employee Id	000009995	
Sybase Id	JBONES9	
Organizations	465001 - ETSS-Enterprise Tech Svc & Sup	
Email	JBONES9@apollo4.acs.ncsu.edu	
Compliance Certification	Completed	

Accounts

Assigned Accounts

Financial
HR
SAR

Accounts To Revoke

SIS

>
<
>>
<<

Modify Effective Date

☐

Effective Date

Immediate

Comments

Continue

Cancel

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.

Delegate Capabilities

Please select the controlled organizations you would like to grant or remove for this user.

User	BWHENRY	Henry,Brent W
Employee Id	000001564	
Email	bwhenry@apollo4.acs.ncsu.edu	
Compliance Certification	Completed	
Organizations	<div>Top Top:OUC:11</div> <div>> < >> <<</div>	
Allow Delegation	<input type="checkbox"/>	
Do Not Receive Email Notifications	<input type="checkbox"/>	
Comments	<div></div>	

Continue Back Cancel

*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.

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Request
DetailsSIS Role
SelectionSIS Org
SelectionSIS
Career/Plan
SelectionSIS
Enrollment
Security
Selection

[Please select one of the following roles: [SIS Admiss Campus Grad row sec, SIS Admiss Campus NDS row sec, SIS Admiss Campus UGRD row sec] , Please add one or more Org selections , Please add one or more Plan selections]

Check For Errors

Career List

Available

AGI
GRAD
NDS
UGRD
VETM

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Selected

Enter Plan

Search Plan

Plan List

Available

02AAMS :Analytics
02FC :First Year College
02GTECTU :US Culture and Education-CTU
02GTR :Visiting Research Students
02GTTCTU :US Culture and Training-CTU
02UTP :University Transition Program
02UTU :University Undergraduate

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Selected

Preview Request

Cancel

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.

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Request Details	SIS Role Selection	SIS Org Selection	SIS Enrollment Security Selection
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Check For Errors

Enter Organization Search Organization

Organization List	Available	Selected
	00NCSU :North Carolina State University	13ED :College of Education Unclassified
	02AA :Initiative for advanced analytics	
	02ASP :Academic Skills Program - 310101	
	02BTEC :Biomanufacturing Training and Educa	
	02COP :Cooperative Education Program	
	02CTNS :College of Textile and Apparel	

Preview Request Cancel

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.

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Request Details	SIS Role Selection	SIS Org Selection	SIS Enrollment Security Selection
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Check For Errors

Enrollment Security Group

Enrollment Security ID Null

Preview Request Cancel

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 with-in 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.