Guide for Access Request Coordinators

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1 Getting Started with Access Requests

This chapter covers:

- About the access request coordinator role
- Understanding roles in ConnectCarolina
- The link between training and system access
- The process from the access requester's perspective
- The process access requests go through
- About the ConnectCarolina access request forms
- Tips for making access requests go smoothly
- ARC tools and resources

About the Access Request Coordinator Role

In your role as an Access Request Coordinator (ARC), you process requests for access to ConnectCarolina, the system the University relies on to help manage its finance, HR, payroll, and student administration functions. You help keep those systems and the information on them secure, ensuring that faculty and staff have the access they need to do their jobs but not more access than they need.

> **Note:** Granting access to InfoPorte, the University's primary source for reporting for most of campus, is handled through a different process than granting access to ConnectCarolina. Refer to the InfoPorte Administrator Guide for information on handling these requests.

To see the list of ARCs and InfoPorte administrators, go to https://ccinfo.unc.edu/access/useful-links-for-access/. Click the InfoPorte Admin and ARC list link to open the list of Access Request Coordinators and InfoPorte Administrators.

Your Responsibilities as an ARC

In your role as an ARC, you:

- submit requests to give and remove access to ConnectCarolina and companion systems for staff members in your school or division.
- track requests through the approval process.
- respond to requests for action from other reviewers or approvers.
- answer questions about how access is granted and point staff members to the resources available.

Besides the processes and steps described in this guide, your school or division may have additional processes for completing and approving access requests.

Understanding Roles in ConnectCarolina

Access to ConnectCarolina is organized into "roles." For example, if a staff member needs to enter deposits for your department, that person needs to receive the role called "University Deposit." Requesting that role gives the staff member access to all parts of ConnectCarolina he or she needs to process incoming payments, make changes to deposits, and view deposits that have been made. Similarly, if a new HR representative needs access to the system, choosing the "HR Representative" role gives the person all the system access they need to do that job.

To understand the roles that are available for Human Resources, Finance, and Student Administration, refer to this page on the ConnectCarolina Info website: http://ccinfo.unc.edu/access/access-roles

The page also lists the training required for each role and the approval process that each role goes through before users receive access.

A Note about Human Resources Roles

There tends to be confusion around some of the HR originator roles, so we thought it would be worthwhile to clarify them in this guide. There are three HR originator roles:

- **Basic Originator:** People with this role can access three ePARs: Funding Swaps, Lump Sum Payments, and Affiliates. They do not have the links to Add/Update Positions or Job Data. Often these users are finance people who receive limited HR access to drive actions in ConnectCarolina that have to do with money and salaries.

- **Student Originator:** People with this role often don't spend most of their time working HR actions. They can access all seven ePARs, but only to work with student PIDs. This user does not have the links to Add/Update Positions or Job Data.

- **HR Representative:** People with this role have the most HR-related access in ConnectCarolina. They tend to be full-time HR professionals in the departments. They have all the links to view employee data, and access to all of the ePAR forms. These users have the Add/Update Positions and Job Data links, as well as Multiple Jobs Summary. Only staff members who have the HR Representative role can be given the Person Update and the Paycheck Support roles.

Note: The Office of Human Resources (OHR) maintains a limit on the number of HR representatives and keeps a list of who has access to the role. They can advise you on whether a department has exceeded their limit.

Three types of HR approver roles review and authorize HR actions that originators produce. A few people perform as multiple types of approvers, but most people have just one approval role. Departments can have varying approval processes depending on the type of HR action involved.

- **Budget Approver:** Approves chartfields and the budgets. They verify the action uses the correct source, and perform budget checks to ensure sufficient funds exist

for the action.

- **HR Approver:** Approves that HR actions are appropriate from a regulatory and procedural point of view by ensuring the action follows all rules and processes.
- **Student Approver:** If the leadership of a department designed their student actions to enter the workflow, this approver performs as the HR approver when an HR action involves a student. Depending on the type of student employee involved and whether department activities are subject to approval, only student approvers, or both student and budget approvers, approve student HR actions.

The Link between Training and System Access

Agreeing to the ConnectCarolina Terms of Use policy and training are required before getting access to many parts of ConnectCarolina (although not all require training).

The Terms of Use Agreement

Regardless of the role being requested, all new employees need to agree to the Terms of Use Policy before being granted access to ConnectCarolina. Employees can access the Terms of Use agreement by logging in to ConnectCarolina at connectcarolina.unc.edu with their UNC Onyen and password. Employees can access the Terms of Use even before they are granted any other access by clicking the compass icon in the top right of the ConnectCarolina screen after they log in, then clicking the Terms of Use Policy. They will need to check the button certifying that they agree and then click the confirm button.

> **Note:** If the person lost access because he or she did not complete the Terms of Use Agreement, check the Terms of Use boxes that correspond to the area you want them to have access to, listed below. Choosing these option lets the Security Team know that the person's access has already been set up and just needs to be reactivated. It also has a shorter approval path and can be handled more quickly.
>
> - **ConnectCarolina-F Terms of Use** for Finance
> - **ConnectCarolina-S Terms of Use** for Student Administration

Registering for Classroom Training

To register for Finance or reporting classroom training, the person requesting access can go to the training schedule: http://ccinfo.unc.edu/training/. (Registration instructions are included in each event's details.)

For HR/Payroll classroom training (for HR representatives, for example), you can see the dates of the next class on the schedule, but the training team will contact the person requesting access to register him or her for class when the access request is approved at the first stop in the approval process.

To register for Student Administration training, the person requesting access can visit the Registrar's website at http://registrar.unc.edu/training/classes/.

Accessing Computer-Based Training

Some required training is in the form of "computer-based training," which is training that the person requesting access can complete at their own pace, and can access from the Training page on the ccinfo.unc.edu website (https://its.cloudapps.unc.edu/cccbt/). Roles that require computer-based training include basic originators, student originators, and approvers on the HR side, and for those who manage assets on the Finance side.

FERPA

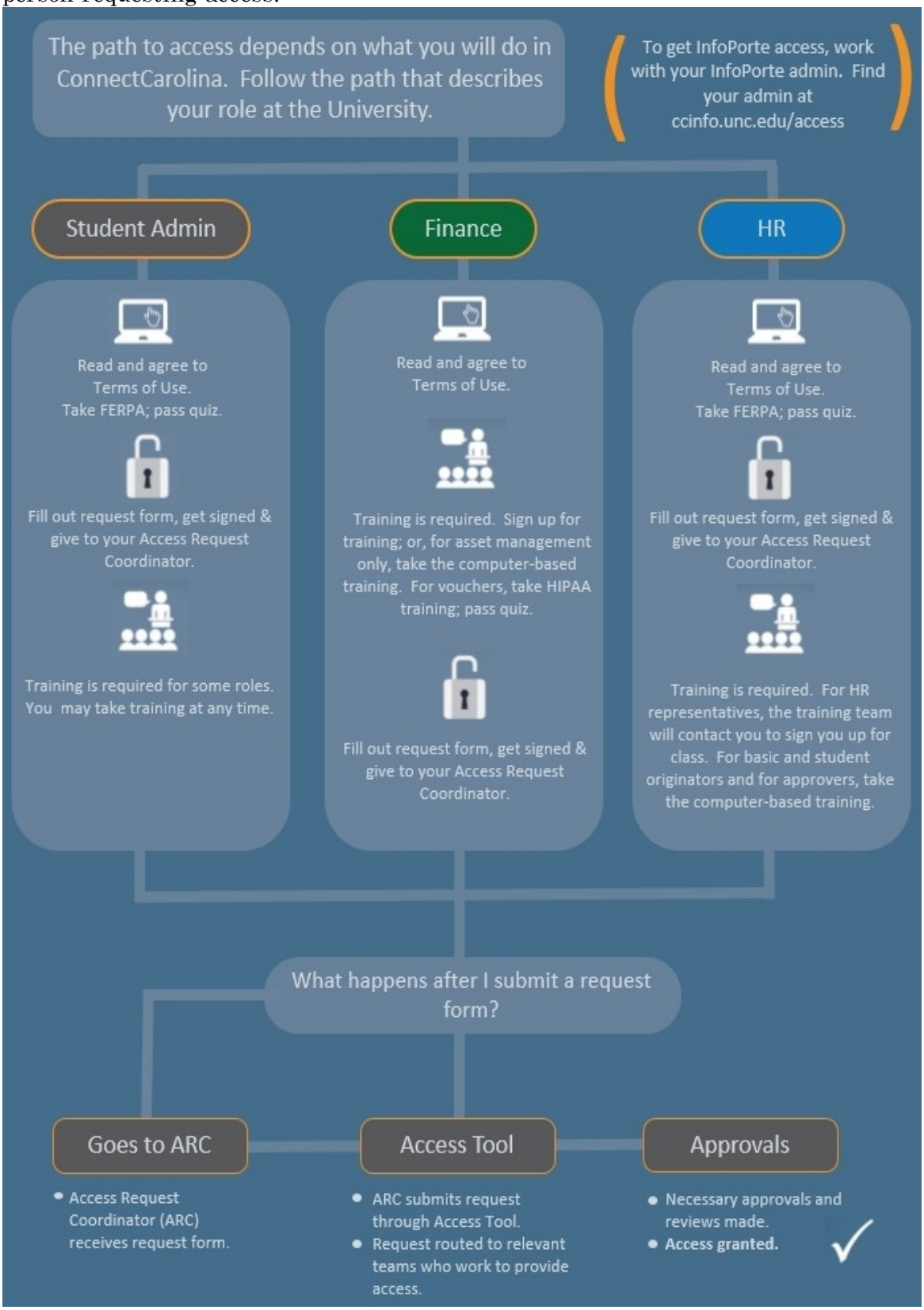
Everyone who has access to the HR/Payroll or Student Administration parts of ConnectCarolina also needs to complete FERPA training (FERPA is a Federal law that protects the privacy of student education records). For information about how to complete FERPA online training, users can go to http://registrar.unc.edu/academic-services/uncferpa/.

Encourage Users to Train in Advance

Access requests are resolved more quickly when the person requesting access signs up for and completes all required training beforehand. The exception is for HR representatives and those who need access to person update information—the training team will sign those people up for class when the access request is approved at the first stop in the approval process. In addition, if you can create separate requests that training is completed for and requests that training has not been completed for, that speeds things along as well.

The Process from the Access Requester's Perspective

Here's a high-level diagram showing the access request process from the perspective of the person requesting access:



The Process Access Requests Go Through

Aside from any additional steps that your department requires, the process that ConnectCarolina access requests go through is:

1. The person who needs new access or a change to his or her access completes an access request form on paper. Your school or division can either use:

   - the form provided by the ConnectCarolina team, which you can find by going to http://ccinfo.unc.edu/access/access-request-forms/ and downloading the **ConnectCarolina and Related Applications Access Request Form** for Finance, Human Resources, or Student Administration.
   - your school or division's form.

   Note: If a person needs access to HR/Payroll, Finance, and Student Administration, he or she needs to submit each request on a separate form. Also, access requests for systems other than ConnectCarolina (such as PeopleAdmin or the P-Card System) need to be on separate forms from requests for access to ConnectCarolina. This is because each of these types of access goes through a different approval process.

2. The person requesting access obtains signatures from your school or division's approvers.

3. The person requesting access refers to http://ccinfo.unc.edu/access/access-roles/ to see what training is required for the requested access. If training is required for access, the person does one of the following:

   - Signs up for a class on the Training tab of the ccinfo.unc.edu website, if the class is a Finance class.
   - Completes computer-based training at any time (preferably before submitting the form).
   - For the HR representative and the HR Person Update role, the ConnectCarolina training team will register the person for class when the first level approves the access request.

4. You receive the completed form either on paper, or electronically after the person scans the form and emails it to you as a file attachment.

5. You enter the completed form into the Access Request Tool in InfoPorte, attaching the scanned form and any other documents your department or division requires. When completing the form, you choose the approval routing needed for the type of form you are submitting.

6. The access request is routed through an approval process that checks things such as:

- Required signatures are present.
- If the request is for HR representative access, checks to make sure the school or division has not exceeded their maximum number of HR representatives.
- If training is required for the role, helps get the person registered for class (for classroom training) and then verifies that training is complete.

7. The ConnectCarolina Security Team does the technical work to either set up or change access for the requesting user.
8. When the requester has received the access they requested and the form is completed, you receive an email saying that the form is complete. Please let the user know, because the user won't receive an email.

About the ConnectCarolina Access Request Forms

Finance, HR/Payroll, and Student Administration each have separate access request forms, and you can find them at http://ccinfo.unc.edu/access/access-request-forms, along with the form for adding and removing ARCs. Your department may also choose to use your own form.

Each form accommodates access requests for multiple applications, which sometimes have different people or groups managing access to them. For example, the University Registrar's Office controls access to student records.

The approval process is different depending on who is the data steward for that system. You'll need to enter a separate request for each application or area, so you may need to attach a single form to multiple access requests. Approvers along the route can ignore any roles on the forms that don't pertain to their area of approval.

About the Finance Form

Use the Finance Access Request Form to request or revoke access to ConnectCarolina Finance roles for campus and central office users. You also use the form to request:

- ConnectCarolina access for those who work in the central administrative offices ("ConnectCarolina central offices" on the form)
- access to the WebTravel system
- access to the P-Card system
- access to the Surplus Property Management system
- access to Foundation business units and department numbers ("Special Data Level Access" on the form)

About the HR/Payroll Form

Use the HR/Payroll Access Request Form to request access to the HR and Payroll parts of ConnectCarolina, including specifying originator and level 1 and 2 reviewer and approver roles at the department and school or division levels. You also use the form to request:

- role changes for central office employees
- changes to access to the PeopleAdmin system
- changes to access to the LawLogix I-9 system
- access to the Payroll Accounting Adjustment Tool (PAAT)
- access to the Certified Background System for HR representatives and some business office employees

About the Student Administration Form

Use the Student Administration Access Request Form to request and revoke access to roles in the Admissions, Student Financials, and Student Records systems. You also use the form to request:

- access to create PIDs in ConnectCarolina
- access to the GradStar system
- access to the Graduate Student Health Insurance Program (GSHIP)

About the ARC Role Request Form

Use the ARC Role Request Form to add or remove an ARC. Deans and vice chancellors will also use this form to authorize an HR Officer or Campus Unit Financial Lead to sign requests for adding or removing ARCs (this role is called an "ARC Designator").

Tips for Making Access Requests Go Smoothly

Some tips for making access requests go more smoothly include:

- **Access Requests Aren't Automatic:** Please help set the expectation that giving access to ConnectCarolina requires multiple people to take action, one after the other. This process can take days or, depending on the complexity of the request, sometimes weeks for requests to be completed. For example, many people think that completing a training class automatically triggers access to ConnectCarolina, but instead, several people have to take action after the user finishes training to turn the access on in ConnectCarolina.

- **Encourage Training:** The training page on ccinfo.unc.edu has links to the training schedule and to computer-based training (CBTs). Anyone requesting Finance access can go ahead and register for all needed classes. Anyone required to complete CBTs can take these classes at any time.

- **Finance Data Access is Different than HR:** If the person is requesting HR access, you need to specify what data the person needs access to. If the person is requesting Finance access, you only need to request data access if the person needs access to a secured chartfield role or a foundation. For foundations, you have to include a justification on the form.

- **Checking Status:** You can check the bottom of the access request to see updates from the approvers. For example, the training team updates the requests to say what training still needs to be completed and contact they have made with the person requesting access. In your InfoPorte inbox, click the hyperlinked title of a request and scroll down to view request activity.

- **Making Changes to Access:** If you need to change the departments a person has access to, please don't check all the roles the person has access to. Similarly, if you are adding or removing a role, there's no need to check all the existing roles. The team will only make the changes you specify, and the access request will finish processing much more quickly if you only list the changes.

ARC Tools and Resources

- **ConnectCarolina Info web site:** Learn about the system and related news, read FAQs, browse and register for available training, access user resources, and find help and support at http://ccinfo.unc.edu.

- **Access Request Forms, ARC and Report Directories:** You can download Access Request Forms for each functional area, the list of ARCs, an inventory of available reports, and more at https://ccinfo.unc.edu/home/access/.

- **System Access Role Details:** See a list of roles and details for each area at http://ccinfo.unc.edu/access/access-roles/.

- **ConnectCarolina Access Quick Reference Card:** You can direct users to this handy guide for navigating the access request process at https://ccinfo.unc.edu/files/2016/01/Access-QRC-1.pdf.

- **Help Desk:** The first stop for help with ConnectCarolina is the Help Desk (ITRC) which can be reached by calling (919) 962-HELP or submitting a help request through the online request tool (http://help.unc.edu).

2 Entering and Submitting Access Requests

This chapter covers:

- Submitting requests for new access or changes to access
- Submitting requests to remove access

Submitting Requests for New Access or Changes to Access

When you receive a signed access request form, you use the Access Request Tool in InfoPorte to enter and submit the request. You attach a scanned copy of the paper form to the request in InfoPorte, so that there is a record of the signature.

> **Note:** If someone leaves a department, that department should submit an access request form to remove their access and their new department should request the access the person needs for their new role. For instructions on removing access, see Submitting Requests to Remove Access.

Follow these steps to submit an access request:

1. When you receive the signed access request, do the following:

   - If the request is for completely new access, ask the person to complete the Terms of Use Agreement by logging in to the home page of ConnectCarolina, reading the terms, checking the agreement box, and then clicking the Confirm button.
   - If the request is for new Student Administration or HR/Payroll access, ask the person to complete FERPA training. For instructions on completing FERPA, the person requesting access can go to the Registrar's website at http://registrar.unc.edu/academic-services/uncferpa/.
   - For Finance access and for HR basic originators, approvers, and student originators, please encourage the person to go ahead and sign up for any required training and complete any required computer-based training. You don't need to wait to submit the request but it speeds the request along if the person has completed training before the request reaches the training team's approval stop.

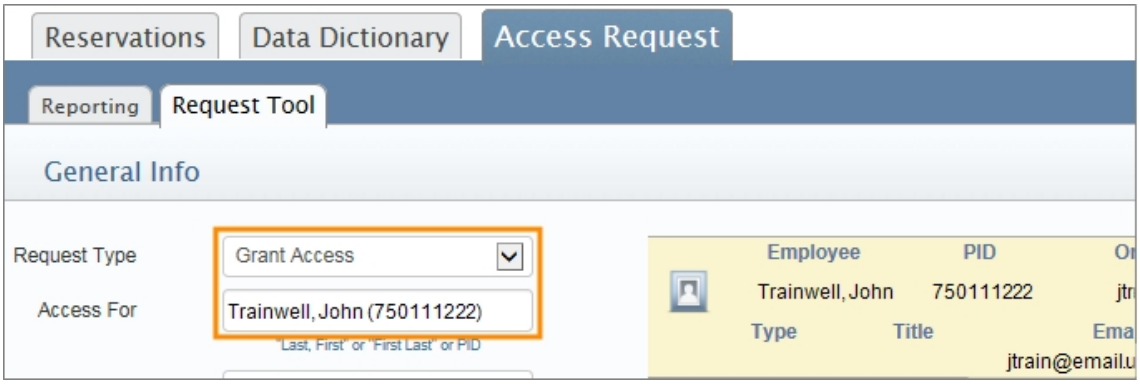
2. To create the request, choose this menu option:

   InfoPorte Home Page > Tools > Access Request > Request Tool

3. Complete the fields:

In this field:	Do the following:
Request Type	Choose **Grant Access**.

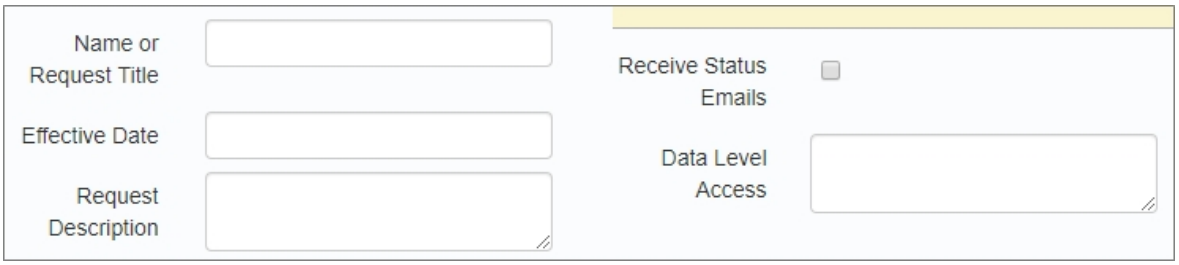
In this field:	Do the following:
Access For	1. Enter the person's name in the format *last, first* or *first last name*, or enter a PID. Result: • The access request form shows a list underneath the field of the people who match what you typed (sometimes it takes a few seconds). 2. Click the appropiate person in the Access For results list. Result: • The system displays the user's Name, PID, Onyen, Home Department ID, Type, Title, and contact information on the right side of the screen.



4. Fill in these fields:

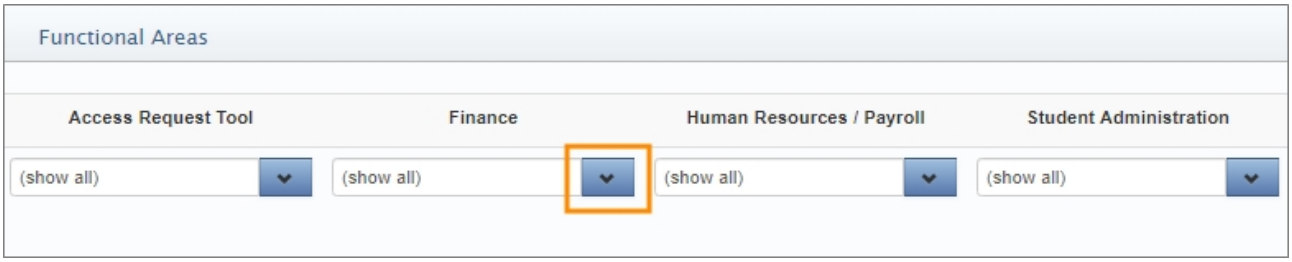
In this field:	Do the following:
Receive Status Emails	Mark the checkbox if you would like to receive an email each time the request gets an update.
Name or Request Title	Enter a name that will help you find the request in your InfoPorte inbox and on reports, or one that meets your school or division's naming conventions.
Request Description	Enter any information that may be helpful or necessary for others during the approvals process. For example, it's helpful to mention whether the person completed training under a different name or if you are only requesting changes to the data that they see (not the options they have access to).
Effective Date	Enter the date the new access should take effect.

In this field:	Do the following:
Data Level Access	Enter the department numbers, business units, account numbers/chartfield strings, application centers, academic organizations, and other access this user needs to access as part of this request.

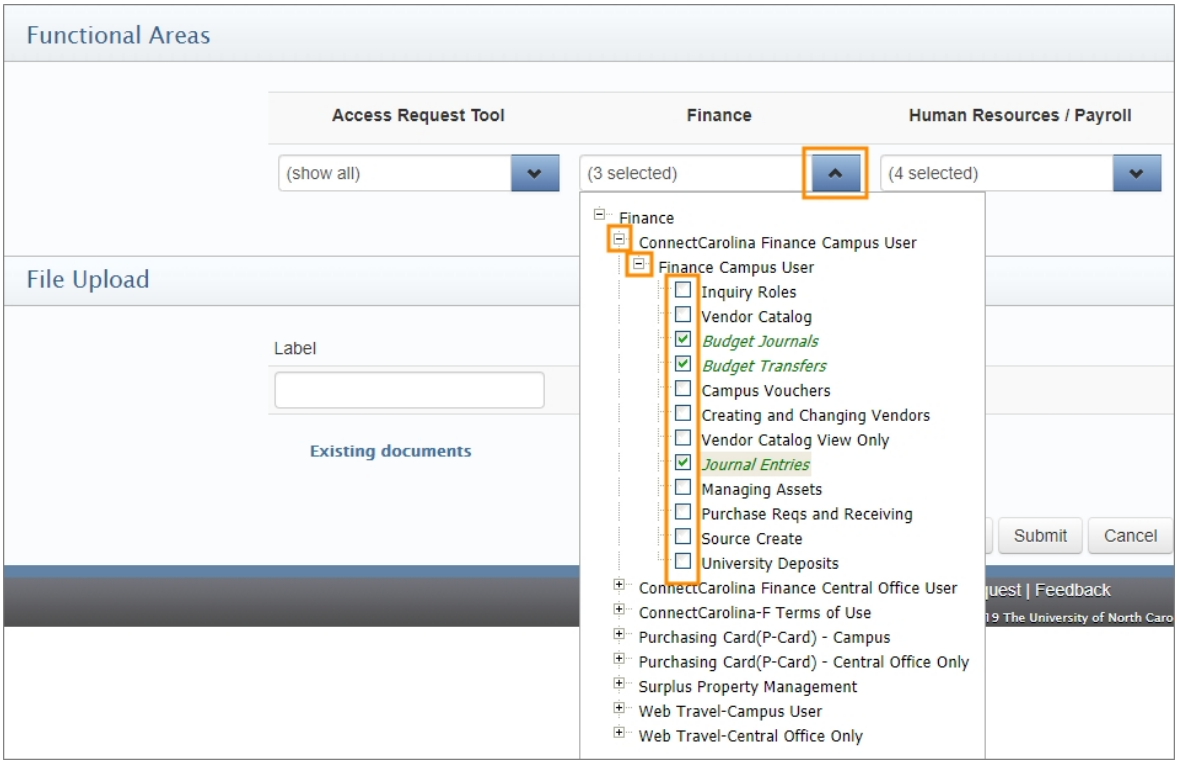


5. Click the list box to display the roles available for one of the functional areas (Finance, Human Resources/Payroll, and Student Administration).

   Note: If the person already has access and you are requesting additional roles, only select the roles that are being added because of this request.



6. Mark the checkboxes next to each role for which you are requesting user access.



7. If needed, you repeat the process for the other functional areas.

8. If you selected any roles by mistake, you can uncheck them before you submit a request.

9. Follow these steps to upload a scanned image of the signed paper form to the request. (You can follow the same steps to attach any other documents you need to include with the request.)

   Note: You can upload files of sizes up to 16 megabytes in Word, Excel, PDF, and plain text formats. You can also attach image files in .gif, .jpg, or .png formats.

   a. In the Label field, enter the name of the document you want to attach. This name is how the document will display as a request attachment.

      Result: When you click in the Label field, a second blank row displays under the first one, allowing you to attach another document.

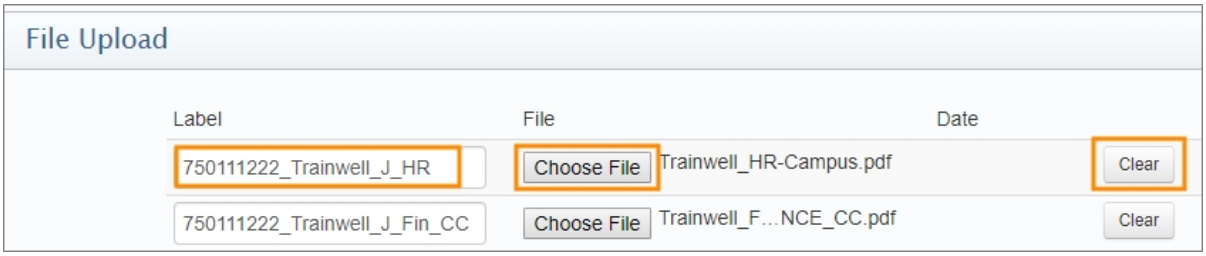
   b. Click the **Choose File** button.

      Result: The Open or Choose File to Upload window opens depending on your browser.

   c. Select the document you want to attach and click **Open**.

      Result: The system displays the name of the file you selected in the File field.

Note: Click the **Clear** button to remove a file from the File Upload list.



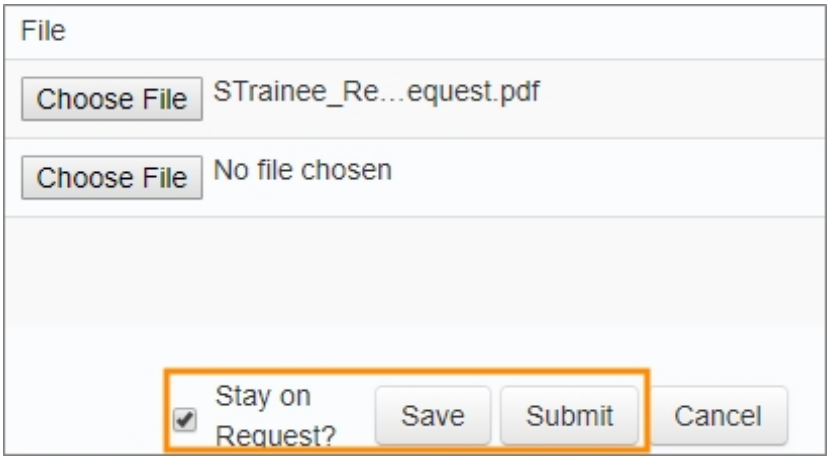
10. Repeat the steps above to attach more documents.

11. The Stay on Request checkbox is marked by default, which means that the request will stay open after you submit it. If you want to return to your inbox after you submit, unmark this box.

    Important: If you make additional changes to the request, the system doesn't create a copy of the request—it changes the original request. Currently, there isn't a way to copy requests.

12. Once you complete the necessary fields, choose one of the following:

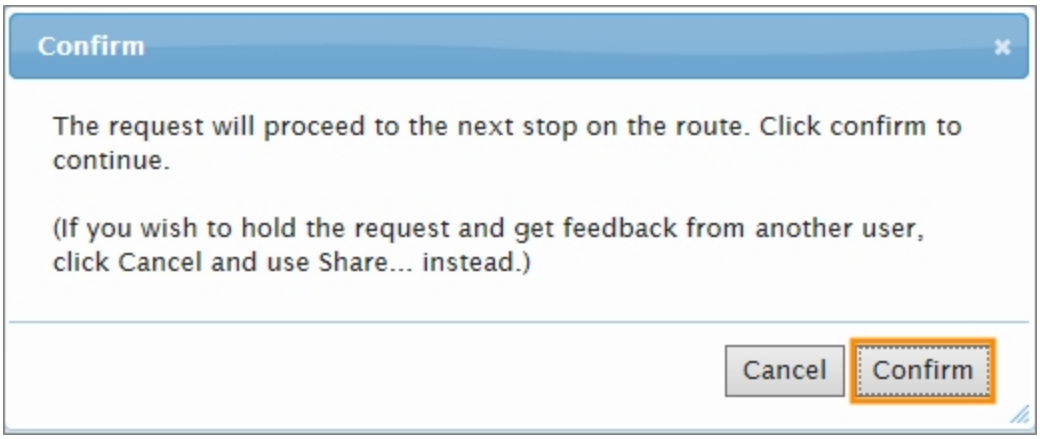
    - Click the **Save** button to save your work as a draft in your InfoPorte inbox without submitting it.
    - Click the **Submit** button to submit your request to grant user access.



Results:

- InfoPorte checks the request for errors and highlights any errors in red.
- InfoPorte displays a message confirming your action.

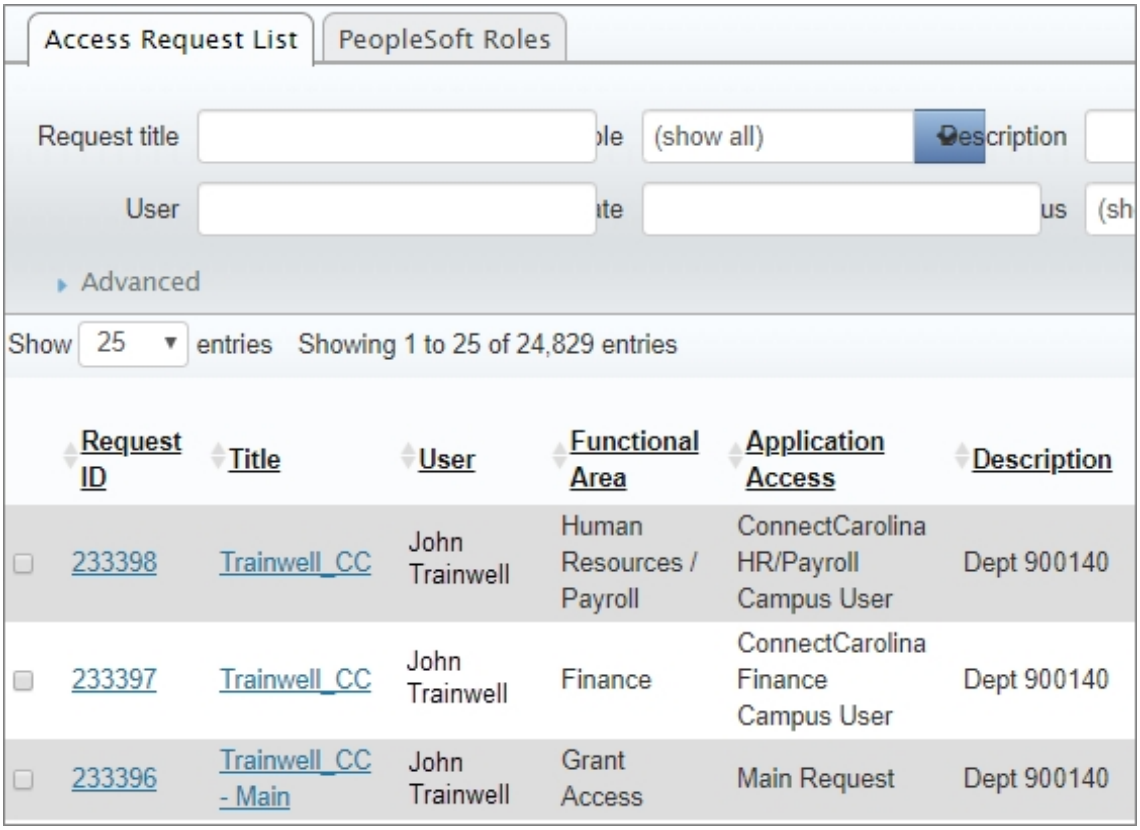
13. Click the **Confirm** button to save or submit your request.



Result: After you confirm submitting the request, it routes to the appropriate teams for approval. Once all route stops approve the request, it moves to the appropriate security team, which grants access according to the details in the request.

Main and Sub-Requests

Starting in August 2019, all requests have a main request and sub-requests. The main request is just a placeholder. The sub-requests have their own approval paths. The system automatically closes the main request when all the sub-requests are completed. In the example below, there is a main request at the bottom of the list for John Trainwell and two sub-requests above it (one for Finance access and one for HR access).


Access Request List
PeopleSoft Roles
Request title
(show all)
User
Advanced
Show 25 entries
Showing 1 to 25 of 24,829 entries
Request ID
Title
User
Functional Area
Application Access
Description
233398
Trainwell_CC
John Trainwell
Human Resources / Payroll
ConnectCarolina HR/Payroll Campus User
Dept 900140
233397
Trainwell_CC
John Trainwell
Finance
ConnectCarolina Finance Campus User
Dept 900140
233396
Trainwell_CC - Main
John Trainwell
Grant Access
Main Request
Dept 900140

Submitting Requests to Remove Access

If an employee leaves the University (is terminated), his or her department needs to submit a request to remove the person's systems access. Be sure to terminate all access to the systems.

If a staff member moves into a different role, his or her department needs to submit a request to remove systems access and the new department needs to request the access the person needs in his or her new position. The department uses the same form to remove access as they do to add access.

> **Important:** When an employee transfers to another department, he or she retains all their access until an approved request removes it.

Follow these steps to submit a request to remove access:

1. Choose this menu option:

   InfoPorte Home Page > Tools > Access Request > Request Tool

2. Complete the fields:

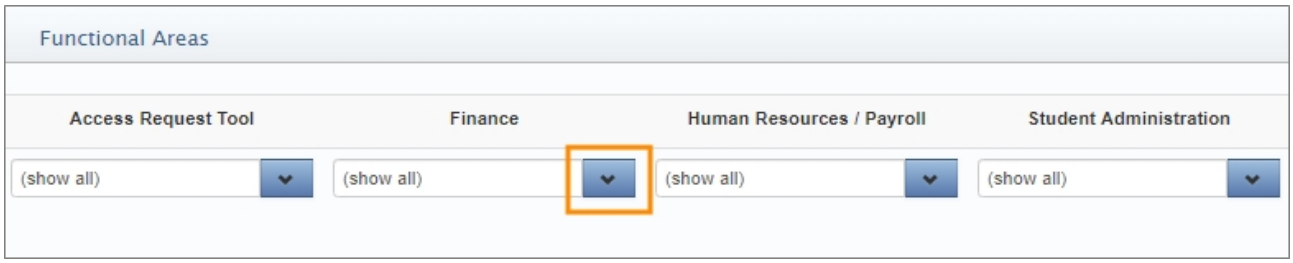
In this field:	Do the following:
Request Type	Choose **Revoke Access**.
Access For	Enter the user's name in the format *last, first* or *first last name*, or enter a PID. Results: • The access request form shows a list underneath the field of the people who match what you typed (sometimes it takes a few seconds). • When you enter a name or PID in the Access For field, the system displays the user's name, PID, Onyen, home department, type, title, and contact information on the right side of the screen in the shaded area.
Receive Status Emails	Mark the checkbox if you would like to receive an email each time the request gets an update.
Name of Request Title	Enter a name that will help you find the request in your InfoPorte inbox and on reports, or one that meets your school or division's naming conventions.
Request Description	Enter any information that may be helpful or necessary for others during the approvals process.

In this field:	Do the following:
Effective Date	Enter the date on which this person should no longer have the access.
Data Level Access	Enter the department numbers, business units, account numbers/chartfield strings, application centers, academic organizations, and other View or Edit access that you are requesting be removed from this person's access.

3. In the Functional Areas section, choose the roles you are removing from this user.

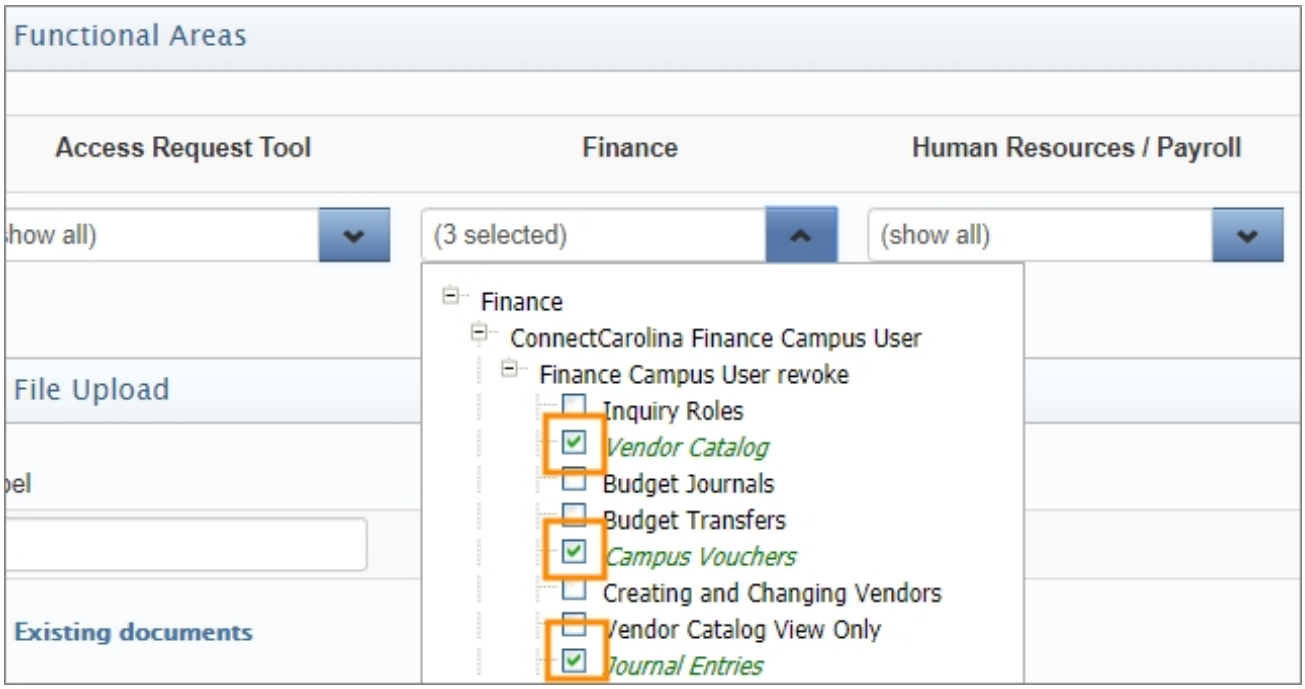
   Note: Select only the roles that will change for the user because of this request.

   a. Click the list box to display the roles available for one of the functional areas (Finance, Human Resources/Payroll, and Student Administration).



   a. Mark the checkboxes next to each role for which you are revoking user access.

      Note: If the employee is being terminated, mark all the checkboxes to terminate all access.



b. If needed, you repeat the process for the other functional areas (Finance, Human Resources/Payroll, and Student Administration).

4. Follow these steps to upload a scanned image of the signed paper form to the request. (You can follow the same steps to attach any other documents you need to include with the request.)

   Note: You can upload files of sizes up to 16 megabytes in Word, Excel, PDF, and plain text formats. You can also attach image files in .gif, .jpg, or .png formats.

   a. In the Label field, enter the name of the document you want to attach. This name is how the document will display as a request attachment.

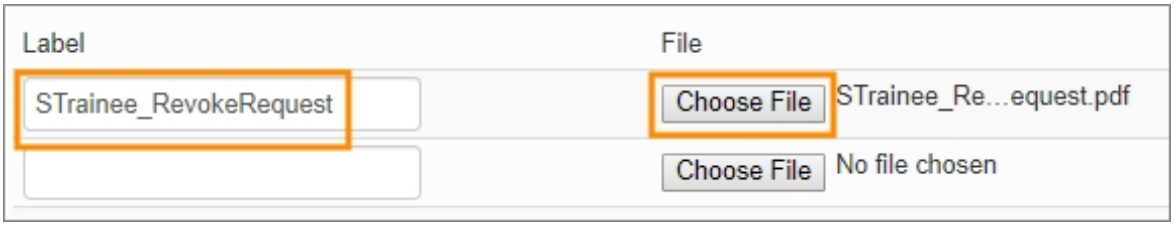
      Result: When you type in the Label field, a second blank row displays under the first one, allowing you to attach another document.

   b. Click the **Choose File** button.

      Result: The Choose File to Upload window opens.

   c. Select the document you want to attach and click **Open**.

      Result: The system displays the name of the file you selected in the File field.



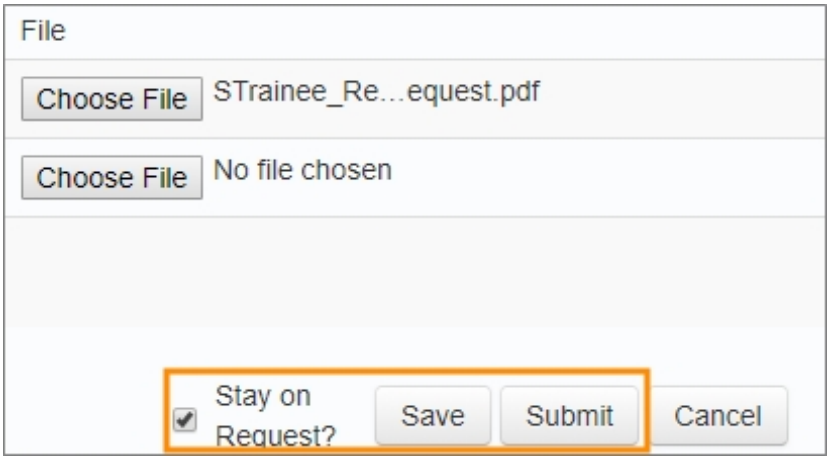
5. Repeat the steps above to attach more documents.

6. The Stay on Request checkbox is marked by default, which means that the request will stay open after you submit it. If you want to return to your inbox after you submit, unmark this box.

   Important: If you make additional changes to the request, the system doesn't create a copy of the request—it changes the original request. Currently, there isn't a way to copy requests.

7. Once you complete the necessary fields, choose one of the following:

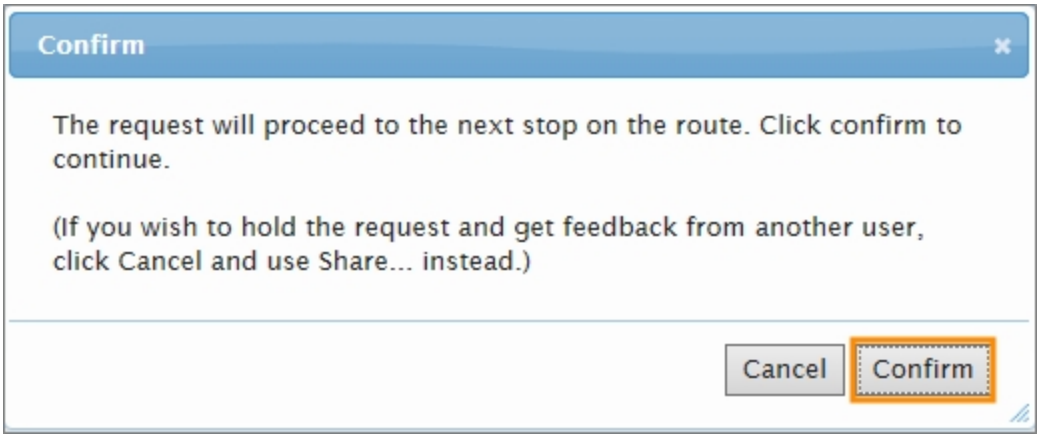
   - Click the **Save** button to save your work as a draft in your InfoPorte inbox without submitting it.
   - Click the **Submit** button to submit your request to remove user access.



   Results:

   - InfoPorte checks the request for errors and highlights any errors in red.
   - InfoPorte displays a message confirming your action.

8. Click on the **Confirm** button to save or submit your request.



Result: After you confirm submitting the request, it routes to the appropriate persons for approval. Once all route stops approve the request, it moves to the appropriate security team, which revokes user access according to the details in the request.

3 Retracting, Deleting, and Sharing Access Requests

This chapter covers:

- About changing, deleting, and sharing access requests
- Retracting an access request
- Deleting an access request
- Sharing an access request
- Working with file attachments

About Changing, Deleting, and Sharing Access Requests

After you submit an access request, you might learn that it requires some changes, or has become obsolete and can be deleted. You may also want to share the request with other staff members who are not on the approval route.

As the originator of an access request, you can retract or delete it at any point in the approval route before it is complete. You can delete a request you originate without doing anything else first. To edit or share a request after you submit it to the approval route, you have to retract the request first.

Note: If a request returns to you with a comment asking you to make changes, you can change the existing access request and resubmit it, rather than deleting the original and starting over with a new request.

Retracting an Access Request

Retracting an access request lets you remove it from the approval route while it stays in your inbox so that you can change, share, or delete. You can only retract requests if they haven't been completed.

Retracting an access request removes it from the inbox of all InfoPorte users on the approval route and lets you:

- make changes to the request, including changing field selections, adding and removing file attachments, and entering comments.
- share the request with other InfoPorte users so they can review and comment on it,
- delete the request, including its history and file attachments.

Retracting an Access Request

Follow these steps:

1. Choose this menu option:

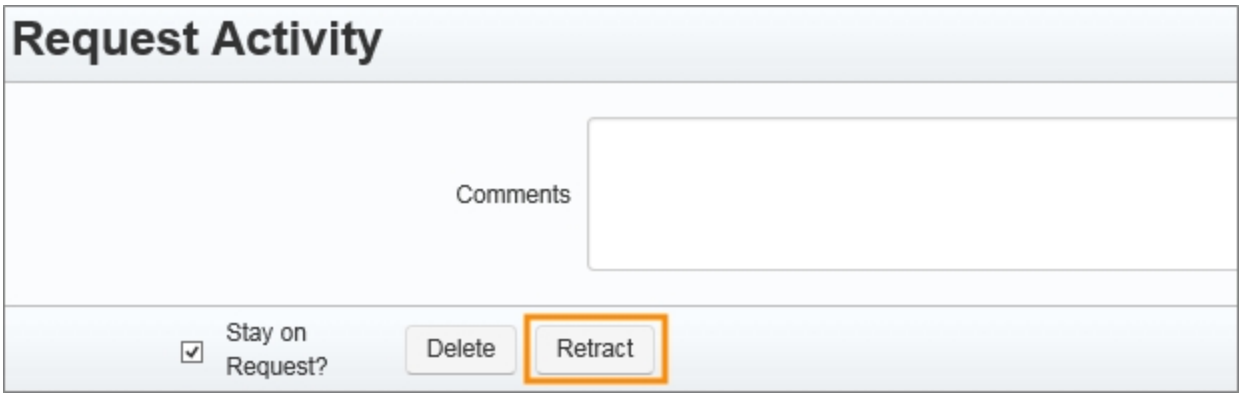
   Main Menu > Inbox > Requests

2. In your InfoPorte inbox, click the link for the request you want to retract.

   Note: You may need to search for the request if there are a lot of requests in your inbox.

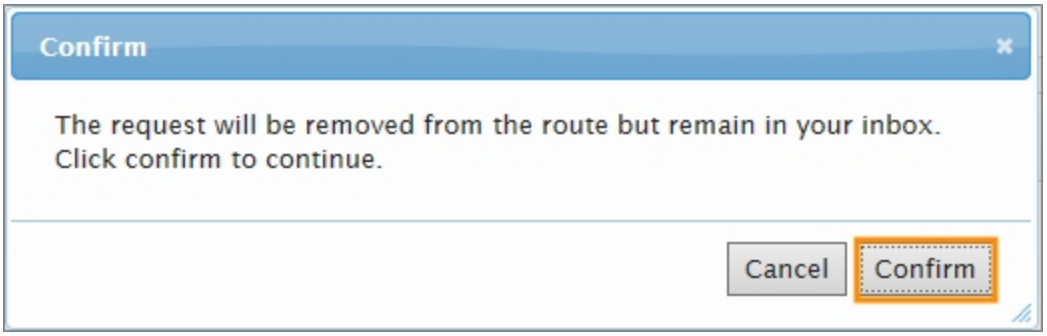
   Result: The system displays the access request you selected.

3. Scroll down to the Request Activity section of the page and click the **Retract** button.



   Result: InfoPorte displays a message asking you to confirm.

4. Click **Confirm** to retract the request.



Results:

- InfoPorte removes the request from all approvers' inboxes.
- If the Stay on Request checkbox was marked, the system keeps the access request open and displays a message confirming that you've retracted the request.
- If Stay on Request was not marked, the system returns to your inbox and displays a message confirming that you've retracted the request.

5. After you retract a request, you can:

- Make changes to the request, including changing field selections, adding and removing file attachments, and entering comments. When you finish, you'll need to resubmit the request for approval.
- Share the request with other InfoPorte users, which lets them read the request and add comments.
- Delete the request, including history and file attachments.

Deleting an Access Request

Instead of completely deleting access requests, most of the time you'll be changing and resubmitting requests. Sometimes, though, you'll need to delete a request completely, for example if the person requesting the access is moving out of your department and no longer needs the new access. In cases like these, there's no need to keep the request—it's best to just delete it.

Notes:

- You can delete a request at any time without retracting it first.
- Deleting a file attachment from a request or deleting an access request that includes a file attachment, does not delete the original file you selected to attach. It only deletes the copy attached to the access request.

Deleting an Access Request

Follow these steps:

1. Choose this menu option:

   Main Menu > Inbox > Requests

2. In your inbox, click the link for the request you want to delete.

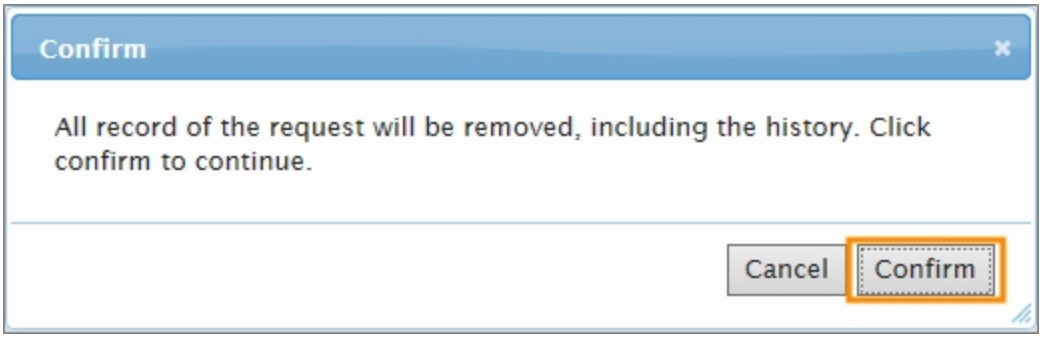
   Note: To remove a request from other users' inboxes while leaving it accessible in your inbox, retract it instead of deleting.

   Result: InfoPorte displays the access request you selected.

3. Scroll down to the Request Activity section of the screen and click the **Delete** button.

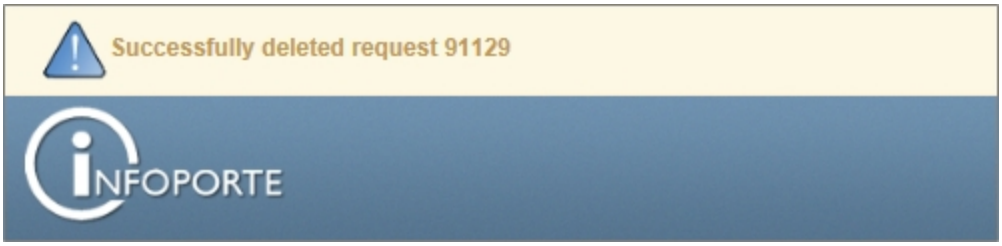
Result: InfoPorte displays a window asking if you're sure you want to delete the request.

4. Click **Confirm** to delete the request:



Results:

- InfoPorte removes the request from your inbox and all approvers' inboxes.
- InfoPorte goes to your inbox and displays a message confirming that the request was deleted.



Sharing an Access Request

After you retract a request, you can share it with one or more users in InfoPorte so they have access to view the request and save additional comments and file attachments to it. The request will also stay in your InfoPorte inbox.

Sharing an Access Request

Follow these steps:

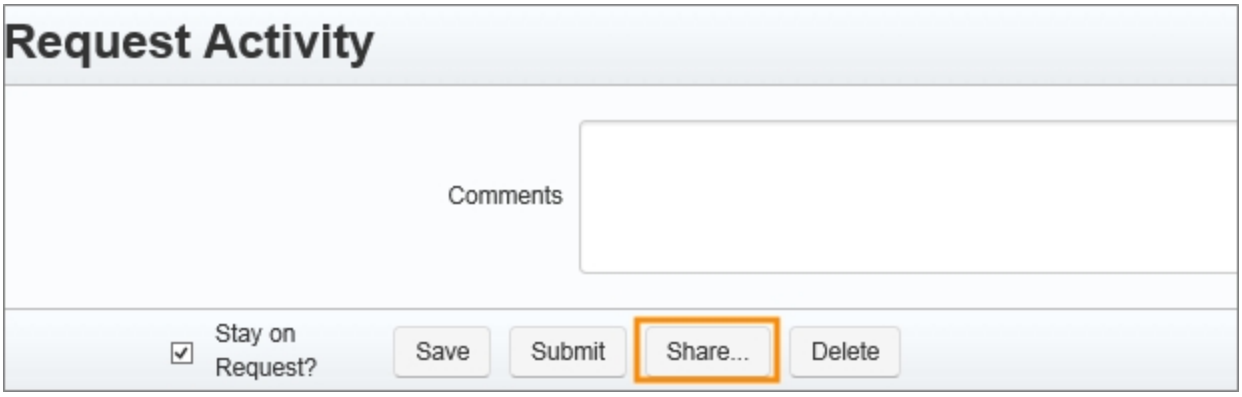
1. Choose this menu option:

   Main Menu > Inbox > Requests

2. In your InfoPorte inbox, click the link for the request you want to share.

   Result: The system displays the access request you selected.

3. Scroll down to the Request Activity section of the screen and click the **Share** button.



   Result: The Share Request box displays.

4. In the text box, type the name of the person you want to share the request with.

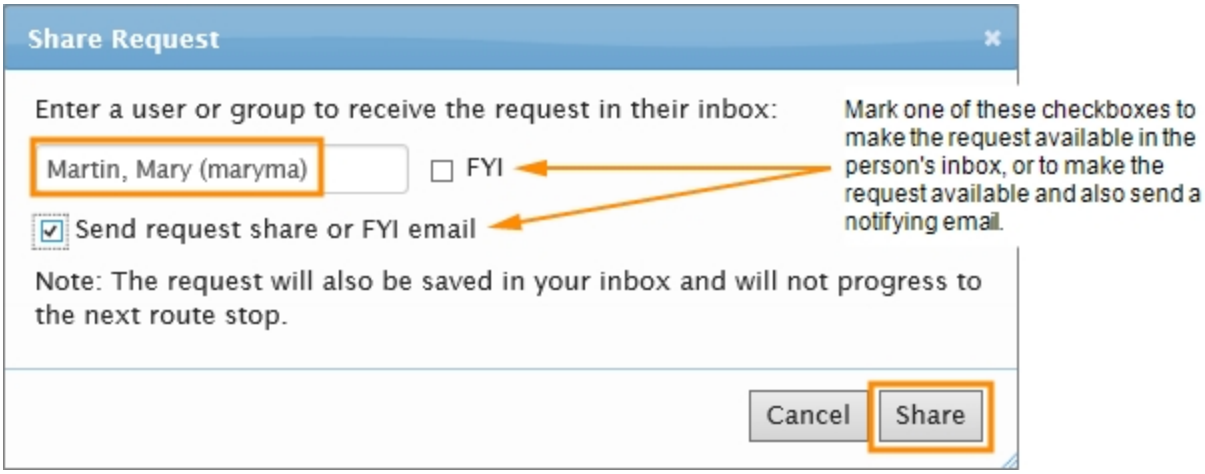
   Result: The system searches for the person whose name you typed and displays the name and PID underneath the field (sometimes it takes a few seconds).

5. Do one of the following:

   - If you mark the FYI checkbox, the request will be available in the InfoPorte inbox of the person you specified, but he or she won't be notified that they've received the request.

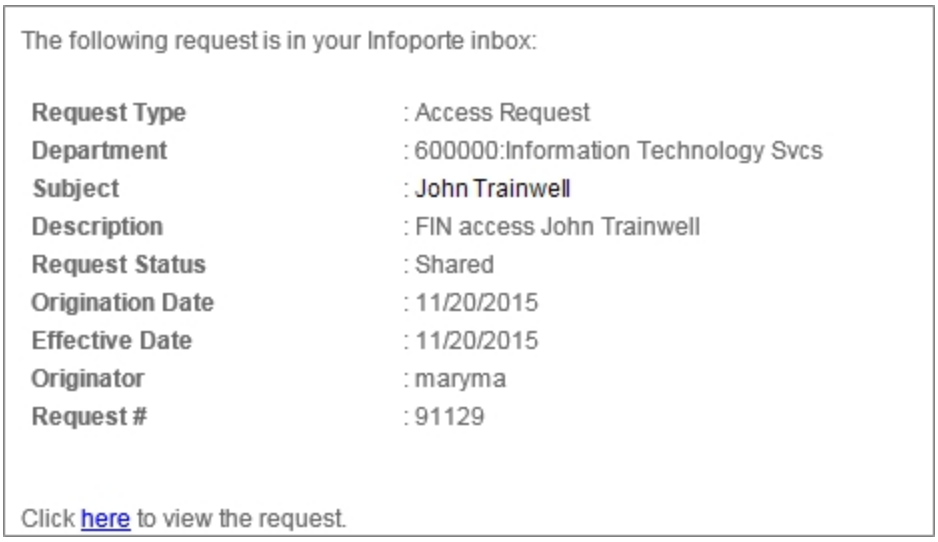
- If you mark the Send Request Share or FYI Email checkbox, the user or group you enter will receive both a notifying email and the item in their InfoPorte inbox.

6. Click the **Share** button.



Results:

- The person or group you entered receives the request in their InfoPorte inbox so they can read it and add comments.
- If you marked the Send request share or FYI email, the person or group you entered receives a notifying email similar to the one below:



- If Stay on Request was marked, InfoPorte stays on the Request Details page. If it wasn't marked, InfoPorte returns to your inbox.
- InfoPorte displays a message confirming that you shared the request.

Note: If the person you shared the request with enters comments, the system displays those comments in the Request Activity log. You can read this log by opening the access request in your inbox and scrolling to the bottom of the page.

Working with File Attachments

After you retract a request, you can make changes and resubmit it for approval. Those changes can include replacing or removing files attached to the request.

Replacing a File Attachment

Follow these steps:

1. Choose this menu option:

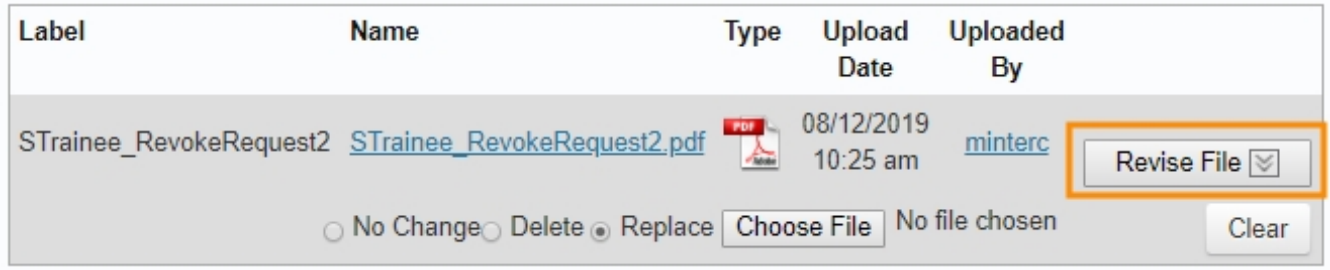
   Main Menu > Inbox > Requests

2. On the row of the request you want to update, click the link in the **Request Title** field.

   Result: The system displays the access request you selected. In the Request Details section of the page, InfoPorte shows the files attached to the request in a table. The table shows information about each file, such as its name, type, the onyen of the person who uploaded the file, and when he or she attached the file to the request.

3. Click the **Revise File** button next to the file you wish to replace on the request.

   Result: The table row expands to show action buttons and a file name field.



4. To replace the file with another file you select:

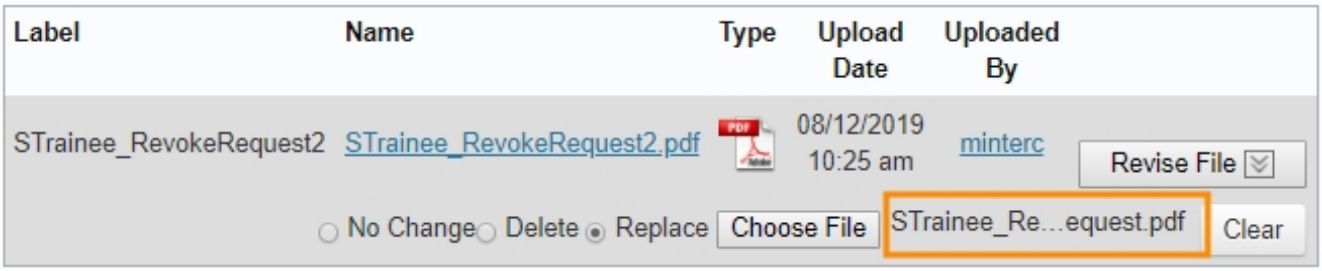
   a. Choose the **Replace** radio button.

      Result: The Choose File button in the file select field becomes active.

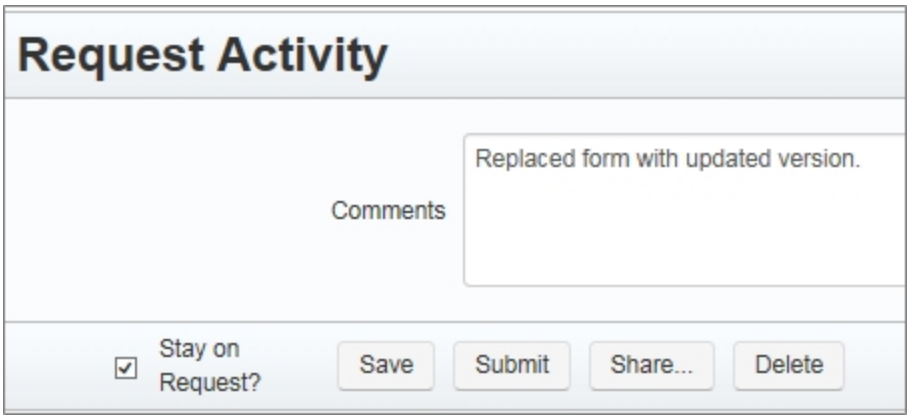
   b. Click the **Choose File** button, select a replacement file on your computer or network.

   c. Click on the **Open** button.

      Result: The file name displays in the file select field.



5. If you want to add comments about why you replaced the file, scroll down to the Request Activity section of the page and type your comments in the Comments field.



6. Click one of these buttons:

   - Click the **Save** button to update the request with your file attachment changes while keeping the request in your inbox.
   - Click the **Submit** button to re-submit the request for approval with your new file attachment.

Removing a File Attachment

Follow these steps:

1. Choose this menu option:

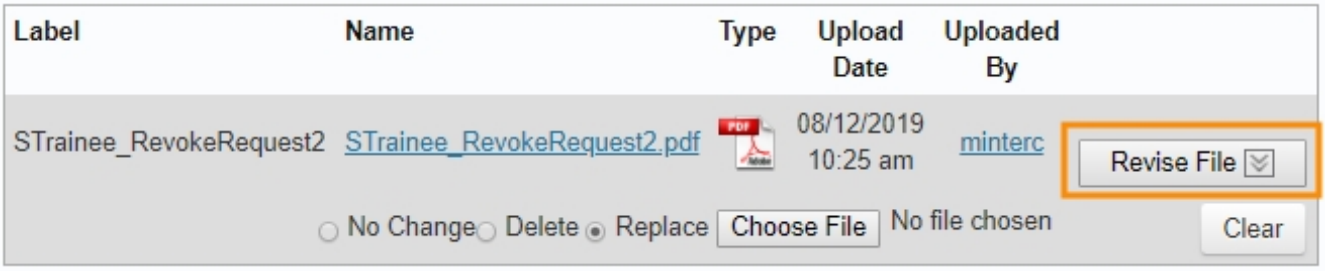
   Main Menu > Inbox > Requests

2. Click the link for the request you want to remove a file attachment from.

   Result: The system displays the access request you selected. In the Request Details section of the page, InfoPorte shows the files attached to the request in a table. The table shows information about each file, such as the name, type, the onyen of the person who uploaded the file, and when he or she attached the file.

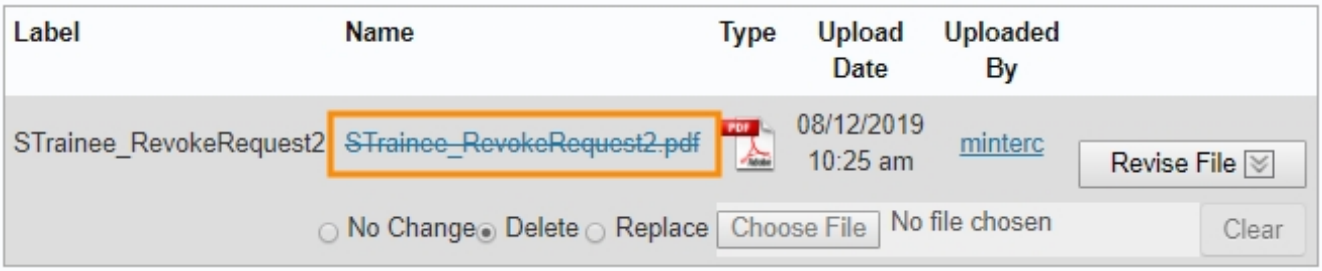
3. Click the **Revise File** button next to the file you want to remove from the request.

   Result: The table row expands to show action buttons and a file name field.



4. Choose the **Delete** radio button.

   Result: The file name displays in strikethrough text in the Name field.

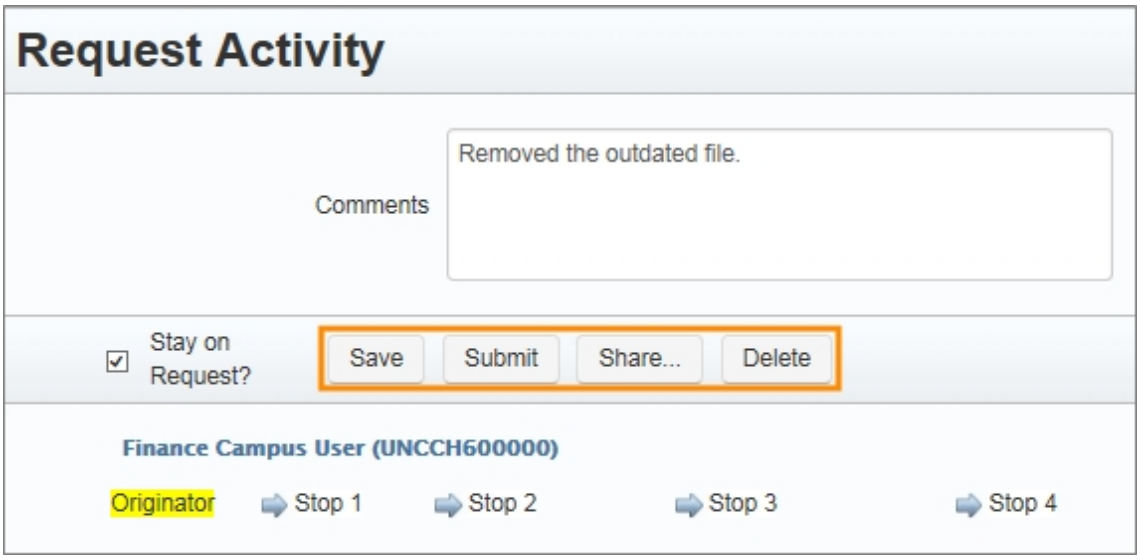


5. If you want to enter a comment about why you removed the attachment, scroll down to the Request Activity section of the page and type your comment in the Comments field.

6. Do one of the following:

   a. Click the **Save** button to update the request with your file attachment changes while keeping the request in your Inbox.

   b. Click the **Submit** button to submit the updated request for approval.


Request Activity
Comments
Removed the outdated file.
Stay on Request?
Save
Submit
Share...
Delete
Finance Campus User (UNCCH600000)
Originator
Stop 1
Stop 2
Stop 3
Stop 4

4 Seeing a List of Access Requests and User Roles

This chapter covers:

- Seeing a list of access requests
- Generating a report of the access roles users have

Seeing a List of Access Requests and User Roles

Seeing a List of Access Requests

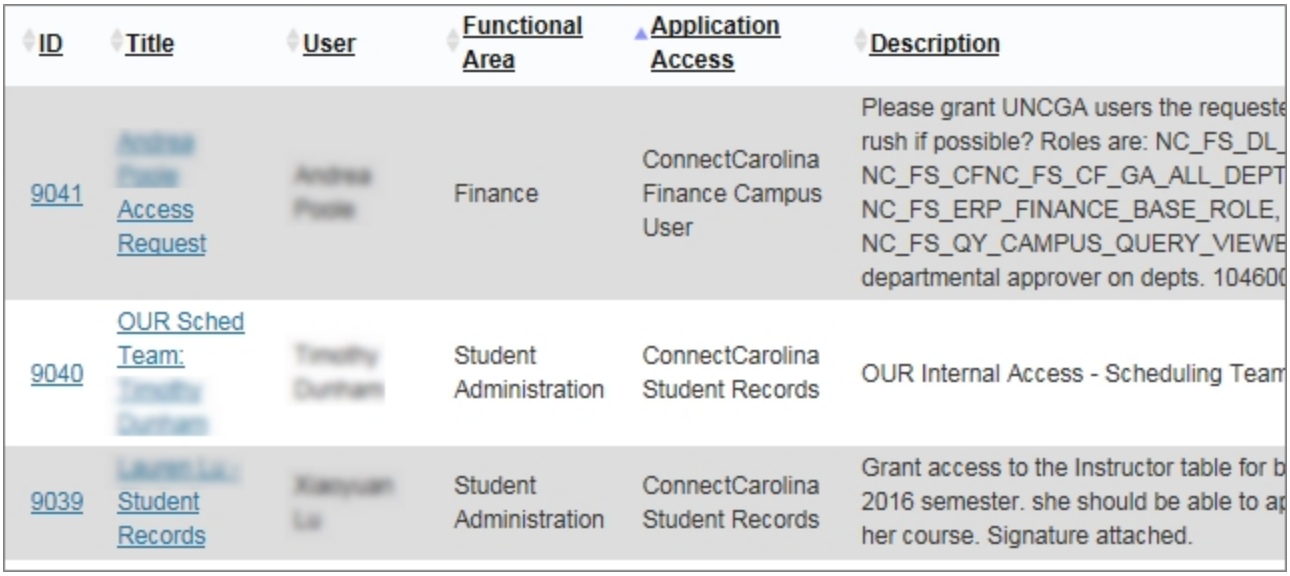
InfoPorte lets you generate a list of all access requests entered since October 1, 2014, or you can enter search criteria to choose which requests you want to see. You can see the report in InfoPorte, and you can also download the report to Excel. Follow these steps:

1. Choose this menu option:

   Main Menu > Tools > Access Request

   Result: The system displays the Access Request List tab, listing access requests entered from system implementation to the present.

   Note: If you don't see the Access Request List tab, put in a help request through the online request tool.



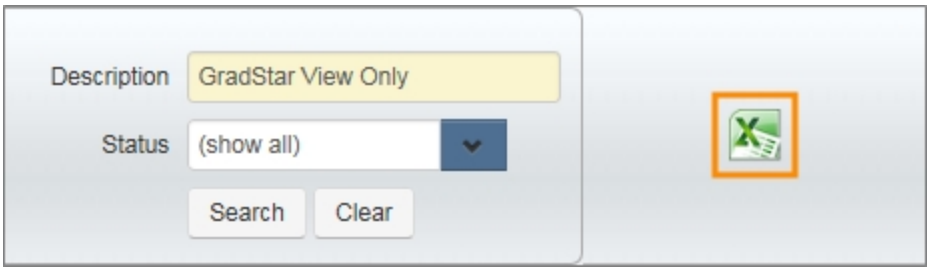
ID	Title	User	Functional Area	Application Access	Description
9041	[redacted] Access Request	[redacted]	Finance	ConnectCarolina Finance Campus User	Please grant UNCGA users the requeste rush if possible? Roles are: NC_FS_DL_ NC_FS_CFNC_FS_CF_GA_ALL_DEPT NC_FS_ERP_FINANCE_BASE_ROLE, NC_FS_QY_CAMPUS_QUERY_VIEWE departmental approver on depts. 10460
9040	OUR Sched Team: [redacted]	[redacted]	Student Administration	ConnectCarolina Student Records	OUR Internal Access - Scheduling Team
9039	[redacted] Student Records	[redacted]	Student Administration	ConnectCarolina Student Records	Grant access to the Instructor table for b 2016 semester. she should be able to ap her course. Signature attached.

2. To filter the request list to show only certain items, for example, only requests for ConnectCarolina Finance Campus User with an Effective Date equal to today's date, fill in criteria in the search fields at the top of the Access Request List page.

   - To narrow the number of requests listed, fill in one or more search fields and click the **Search** button.

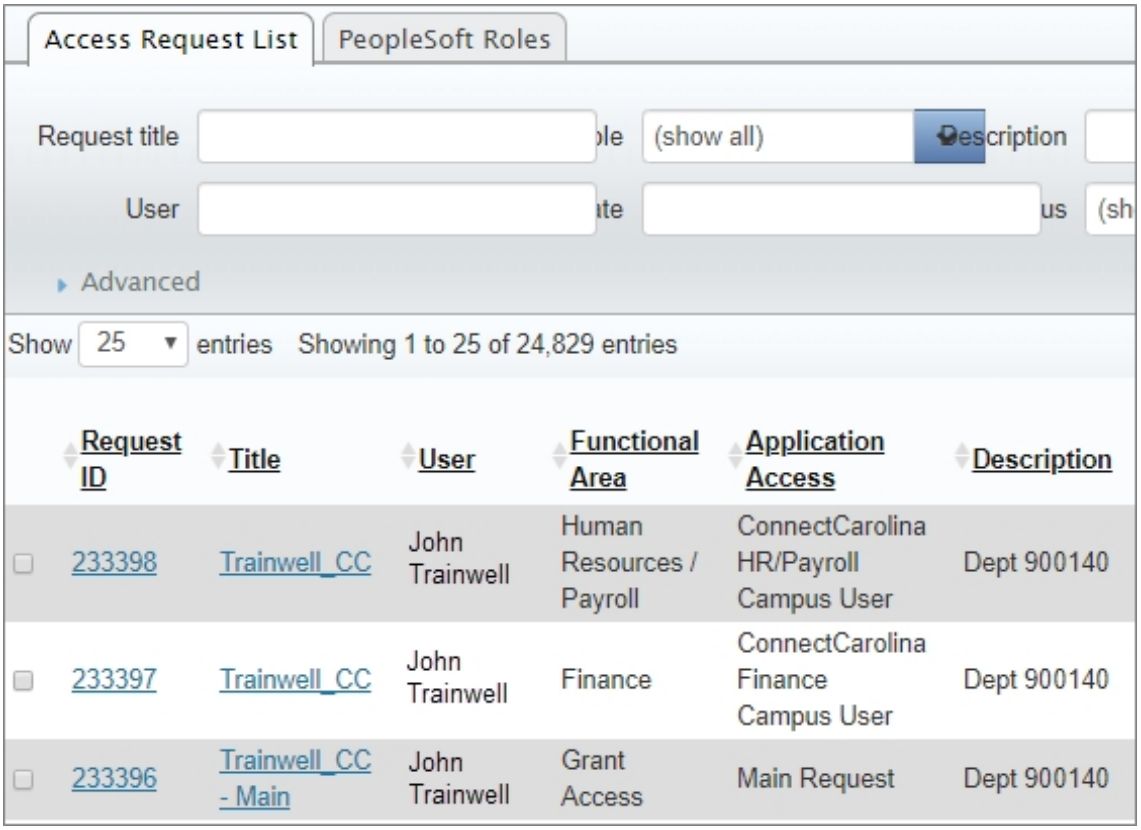
   - To clear the search fields so you can enter new search terms, click **Clear**.

3. If you want to export your search results to Excel, click the Excel button to the right of the search fields:



Main and Sub-Requests

Starting in August 2019, all requests have a main request and sub-requests. The main request is just a placeholder. The sub-requests have their own approval paths. The system automatically closes the main request when all the sub-requests are completed. In the example below, there is a main request at the bottom of the list for John Trainwell and two sub-requests above it (one for Finance access and one for HR access).



Request ID	Title	User	Functional Area	Application Access	Description
233398	Trainwell_CC	John Trainwell	Human Resources / Payroll	ConnectCarolina HR/Payroll Campus User	Dept 900140
233397	Trainwell_CC	John Trainwell	Finance	ConnectCarolina Finance Campus User	Dept 900140
233396	Trainwell_CC - Main	John Trainwell	Grant Access	Main Request	Dept 900140

Generating a Report of the Access Roles Users Have

InfoPorte lets you generate reports of which roles ConnectCarolina users have. This report is helpful, for example, when you want to give a new staff member the same roles that another staff member has. You can look at the report in InfoPorte and you can export it to Excel.

Follow these steps:

1. Choose this menu option:

   Main Menu > Tools > Access Request > PeopleSoft Roles

   Result: The system displays the PeopleSoft Roles tab, showing a list of all the roles ConnectCarolina users have assigned to them.

2. Do one of the following:

   a. Use the search fields at the top of the page to choose which users you want to see, and click the **Search** button.

   b. To clear the search fields so you can enter new search terms and build a differently customized list of users, click Clear.

User	Department	Functional Area	Application	PeopleSoft Role
[redacted]	423501	Finance	ConnectCarolina FSCM	AM Inquiry Access
[redacted]	423501	Finance	ConnectCarolina FSCM	AP Campus User
[redacted]	423501	Finance	ConnectCarolina FSCM	AP Inquiry Role
[redacted]	423501	Finance	ConnectCarolina FSCM	AR Depositor

3. If you want to download your results to Excel, click the Excel button to the right of the search fields.

5 About Request Statuses

This chapter covers:

- About request statuses
- Opening access requests to check their status
- Accessing requests from the access request list
- Examples of access request activity

About Request Statuses

The two main ways you can check the status of access requests is to open requests from your inbox or to search for the requests you want to see using the Access Request List. Steps for both are below.

Item Status Definitions

As access requests go through the process, their status changes:

Status:	Definition:
Originated	A new request, submitted to the first stop on its approval route.
Draft	A saved request that remains in the originator's inbox until he or she submits it for approval
Complete	The security team granted the requested access. The last status an item can have before it is finally "Posted."
Revision Required	A stop on the approval route has rejected the request, usually with comments detailing required changes. To receive approval, the originator needs to edit and resubmit the request.
Approved	A stop on the approval route approved the request. If the request has been approved at the first approval stop and is on to the second or subsequent stops, the request status reads "In Progress" in the inbox, and "Approved" on the Request Details page at each stop where it was approved.
Updated	The request is updated and stays at the same route stop. Usually this is because an approver added a comment and saved the request, but did not approve or reject the request, and kept it in their inbox.
Retracted	The originator removed the request from the approval route to revise and resubmit, or delete the request.
Resubmitted	The originator retracted a request, or a request was rejected, that was later updated and submitted for approval again.
Posted	The request is complete and fully implemented.
Shared	An approver has forwarded the item to other reviewer and approver inboxes. Other users receiving a shared request can approve, reject, or disregard it.
Replied	A person who received a "Shared" request may "Reply" to that request.
Notified	When a request is changed and previous approvers on the route need to be aware a change was made, they receive a "Notify."

Opening Access Requests to Check Their Status

All of the InfoPorte requests that you originated and that are still active display in your InfoPorte inbox. If someone shares a request with you, you'll see those requests in your inbox as well. You can open any item in your inbox to check its status and to see what steps have been taken with it.

Follow these steps to see the status of a request in your inbox:

1. Choose this menu option:

   InfoPorte Home Page> Inbox > Requests

2. Use the search tool at the top of the page to locate the request you would like to see. You can filter by:

   a. Specifying the type of item in the Types field.

   b. Specifying that you only want to see requests in a certain status in the Status field.

   c. Clicking the **Advanced** button to display more fields that you can filter by.

3. Click the **Search** button.

   Result: Your inbox displays only those items matching the criteria you select or enter in the search fields.

4. Do any of the following:

   - If you want to download the list to Excel, click the **Excel** button to the right of the search tool.
   - If you want to enter new search terms, click the **Clear** button.
   - If you want to see a list of all active items in your Inbox, click the **Clear** button, then click the **Search** button.
   - To see details for an item in your Inbox, click the link in the Request Title field.

   Result: The system displays the access request you selected, including request details and activity. Request Details displays the vital information about a request and links to its attached documents. Below that, Request Activity displays an audit trail showing the various statuses and associated date/time stamps and comments the item has accumulated along its approval route.

   Note: To return to your Inbox after viewing an access request, click the Return to List button.

Accessing Requests from the Access Request List

The Access Request List lists all access requests entered in InfoPorte by all its users since the system came online in October 2014. Follow these steps:

1. Choose this menu option:

   InfoPorte Home Page> Tools> Access Request

   Result: The Reporting tab's Access Request List tab displays, listing all access requests entered from system implementation to the present.

2. To filter the request list, enter criteria in the search fields at the top of the page and click the **Search** button.

   Result: InfoPorte shows the requests that match your search criteria.

3. To see the details for any request in the list, click the link in Request Status field.

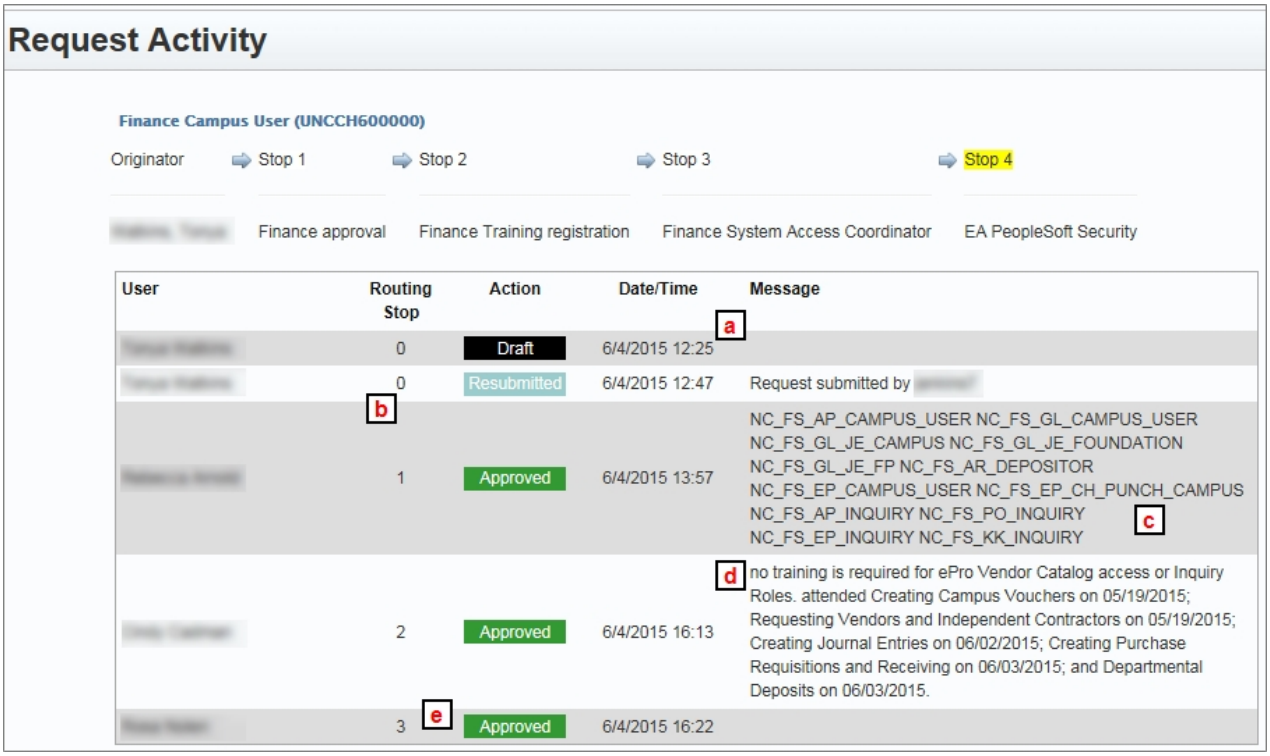
   Result: The system displays the item's Request Summary page, where you can see the steps that have been taken with the request.

4. To clear the search fields so you can enter new search terms, click **Clear**.

Examples of Access Request Activity

Below are some examples of request activity logs, which you find near the bottom of the access request page. The statuses and notes on the right show what happened at each stop on the approval path:

Example One: A Finance Request



Request Activity

Finance Campus User (UNCCH600000)

Originator → Stop 1 → Stop 2 → Stop 3 → Stop 4

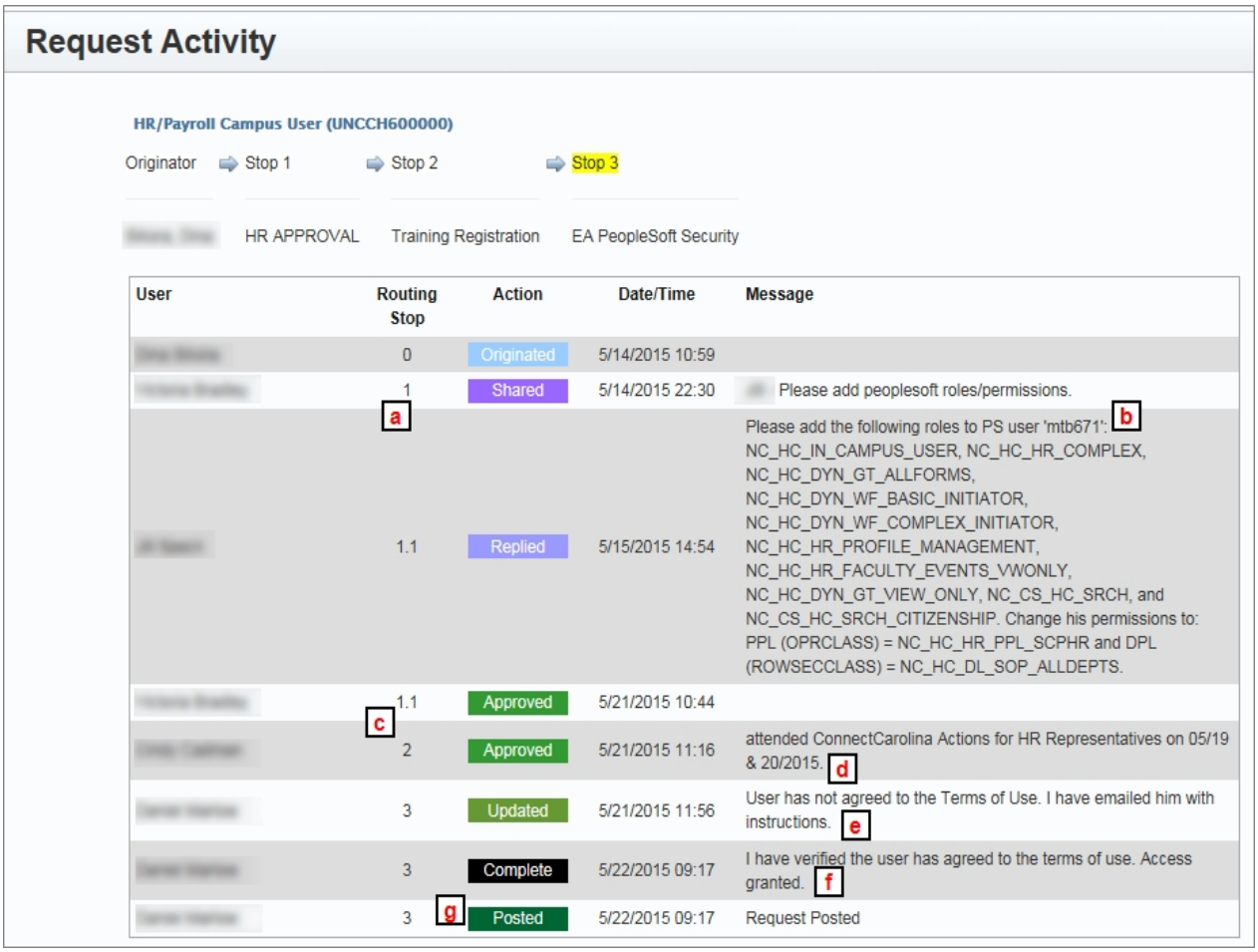
[redacted] | Finance approval | Finance Training registration | Finance System Access Coordinator | EA PeopleSoft Security

User	Routing Stop	Action	Date/Time	Message
[redacted]	0	Draft	6/4/2015 12:25	a
[redacted]	0	Resubmitted	6/4/2015 12:47	Request submitted by [redacted]
[redacted]	1	Approved	6/4/2015 13:57	b NC_FS_AP_CAMPUS_USER NC_FS_GL_CAMPUS_USER NC_FS_GL_JE_CAMPUS NC_FS_GL_JE_FOUNDATION NC_FS_GL_JE_FP NC_FS_AR_DEPOSITOR NC_FS_EP_CAMPUS_USER NC_FS_EP_CH_PUNCH_CAMPUS NC_FS_AP_INQUIRY NC_FS_PO_INQUIRY NC_FS_EP_INQUIRY NC_FS_KK_INQUIRY c
[redacted]	2	Approved	6/4/2015 16:13	d no training is required for ePro Vendor Catalog access or Inquiry Roles. attended Creating Campus Vouchers on 05/19/2015; Requesting Vendors and Independent Contractors on 05/19/2015; Creating Journal Entries on 06/02/2015; Creating Purchase Requisitions and Receiving on 06/03/2015; and Departmental Deposits on 06/03/2015.
[redacted]	3 e	Approved	6/4/2015 16:22	

In the Finance example above:

1. The ARC began drafting a request, saved it (a).
2. The request was submitted it a few minutes later (b).
3. At Routing Stop 1, the Finance area noted the technical names for the access roles to be assigned (c).
4. At Stop 2, the ConnectCarolina training team added a comment, documenting the classes and dates the user attended to complete required training (d).
5. A few minutes later, the Finance System Access Coordinator approved the request at Stop 3 (e).
6. Now the request is at the end of the approval process at Stop 4, waiting for the ConnectCarolina security team to turn on the person's access.

Example Two: An HR Example



In the HR example above:

1. After the ARC originated the request, it went to the HR office at Routing Stop 1, where the approver used the Share function to share the request with others in their office (a).

2. The person sharing asked HR office colleagues to specify the roles and permissions the user would need in the system. The next day, at Stop 1.1, an HR office colleague provided the requested role information (b).

3. A few days later, the HR office approved the updated request (c).

4. Shortly after that approval, at Stop 2, the ConnectCarolina training team confirmed the user completed the training they needed for access in the requested role. They added a comment documenting the class name and attendance dates and approved the request to move to Stop 3 (d).

5. When the ConnectCarolina security team received the request at Stop 3, they noticed the user had not completed the Terms of Use agreement, which is a requirement for all

users regardless of their role. The security team informed the user about how to complete the agreement, and updated the request status accordingly (e).

6. The next day, after the security team member verified the user had completed the agreement, she made the system changes necessary to enable the user's requested access (f).

7. Then she completed the last step in the process by posting the request (g).

6 Adding and Removing ARCs

This chapter covers:

- ARC Access Request Form
- Submitting Requests to Add ARC Access or Change ARC Access
- Submitting Requests to Remove ARC Access

Adding and Removing ARCs

To ensure that a dean or vice chancellor approves each ARC, there's an access request form for adding and removing ARCs that requires the approval of a dean or VC. The form is also used to delegate approvals for new ARCs to an HR officer or Campus Unit Financial Lead (so, for example, the Campus Unit Financial Lead or HR officer can sign instead of the dean or VC.). You submit this form the same way you do other access requests, but there's a specific approval path in the ARC tool that routes it differently.

> **Note:** InfoPorte Administrators cannot give someone access to use the Access Request Tool. This access can only be given through this process.

ARC Access Request Form

You can find the form for adding or removing ARCs, labeled Request for Access Request Coordinator (ARC) - Related Changes at https://ccinfo.unc.edu/access/access-request-forms.

Submitting Requests to Add ARC Access or Change ARC Access

Similar to other access requests, when you receive a signed access request form, you use the Access Request Tool in InfoPorte to enter and submit the request. You attach a scanned copy of the paper form to the request in InfoPorte, so that there is a record of the signature.

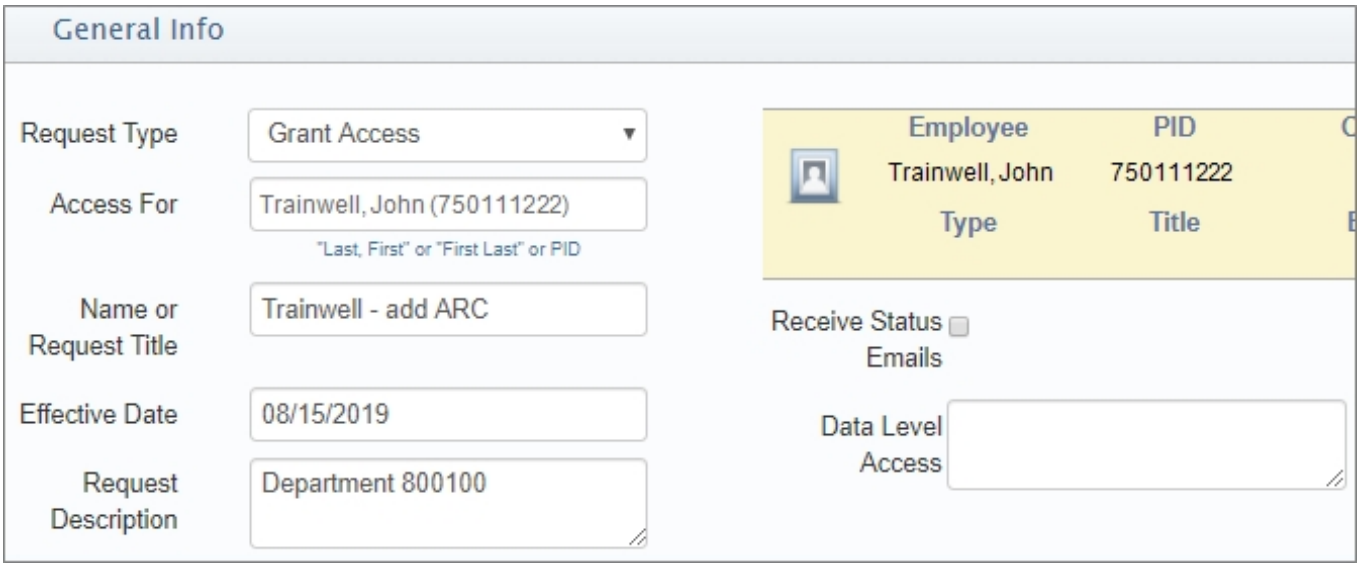
Follow these steps to submit an access request to add an ARC or change ARC access:

1. To create the request, choose this menu option:

   InfoPorte Home Page > Tools > Access Request > Request Tool

2. Complete the fields:

In this field:	**Do the following:**
Request Type	Choose **Grant Access** to add a new ARC, ARC Designator, or to give someone view-only access to see access requests.
Access For	Enter the person's name in the format *last, first* or *first last name*, or enter a PID. Results: • The access request form shows a list underneath the field of the people who match what you typed (sometimes it takes a few seconds). • When you enter a name or PID in the Access For field, the system displays the user's Name, PID, Onyen, Home Department ID, Type, Title, and contact information on the right side of the screen in the shaded area.
Receive Status Emails	Mark the checkbox if you would like to receive an email each time the request gets an update.
Name of Request Title	Enter a name that will help you find the request in your InfoPorte inbox and on reports, or one that meets your school or division's naming conventions.
Request Description	Enter any information that may be helpful or necessary for others during the approvals process.
Effective Date	Enter the date the new access should take effect.

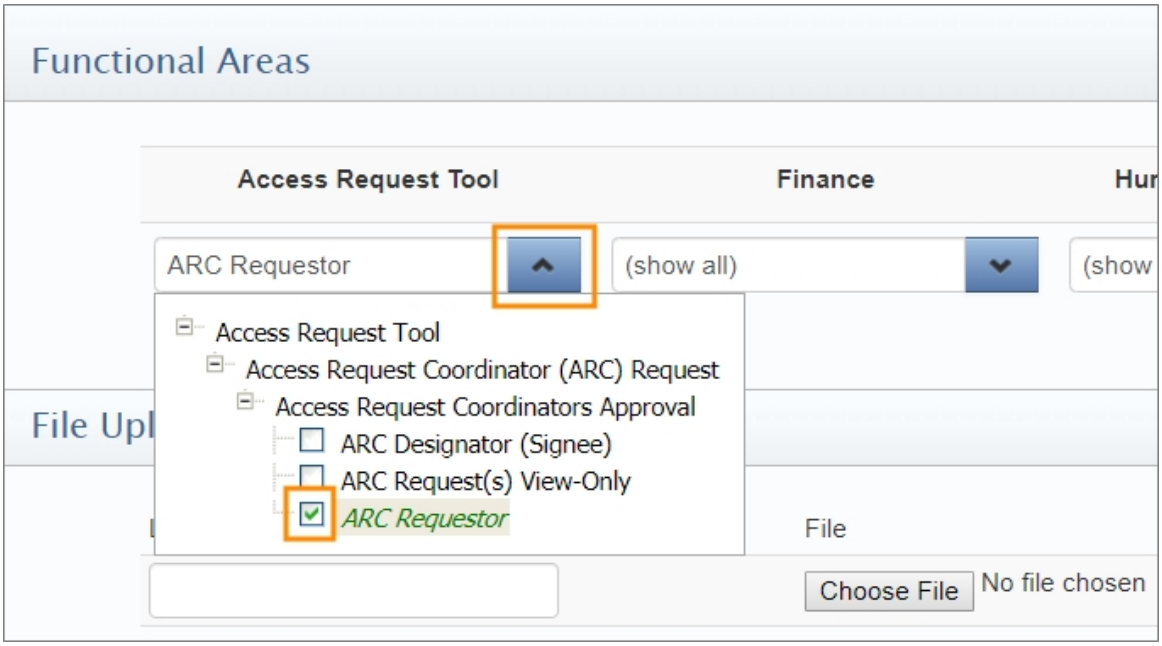


Note: An ARC other than the one referenced on the form must enter the request into the ARC tool.

3. In the **Access Request Tool** field, follow these steps to enter the roles the person should be given:

   a. Click the list box to display the roles available.

   b. Mark the checkboxes next to each role for which you are granting user access.



4. Follow these steps to upload a scanned image of the signed paper form to the request. (You can follow the same steps to attach any other documents you need to include with

the request.)

Note: You can upload files of sizes up to 16 megabytes in Word, Excel, PDF, and plain text formats. You can also attach image files in .gif, .jpg. or .png formats.

a. In the Label field, enter the name of the document you want to attach. This name is how the document will display as a request attachment.

   Note: When you click in the Label field, a second blank row displays under the first one, allowing you to attach another document.

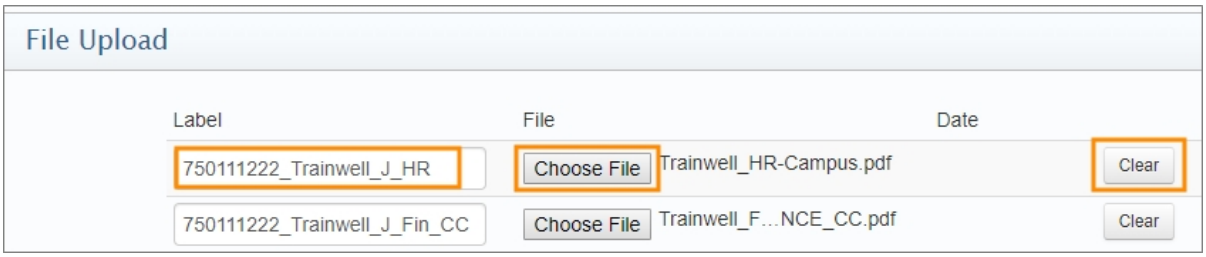
b. Click the **Choose File** button.

   Result: The Choose File to Upload window opens.

c. Select the document you want to attach and click **Open**.

   Result: The system displays the name of the file you selected in the File field.

   Note: Click the Clear button if you want to remove a file from the File Upload list.



d. Repeat the steps above to attach more documents.

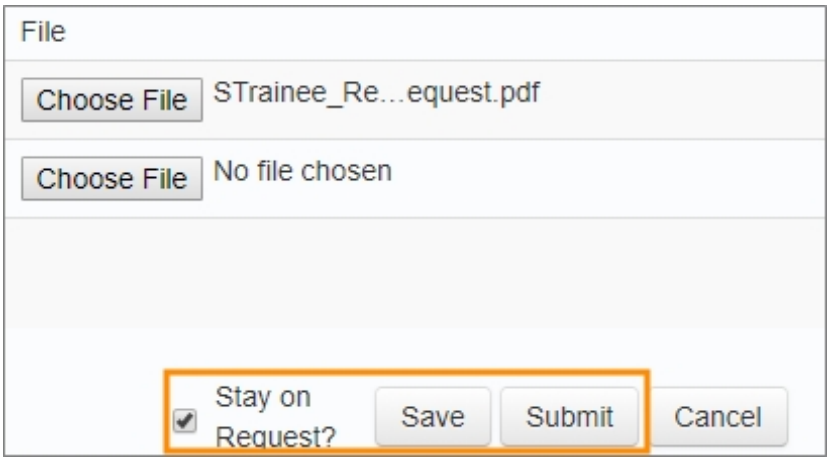
5. The Stay on Request checkbox is marked by default, which means that the request will stay open after you submit it. If you want to return to your inbox after you submit, unmark this box.

   Important: If you make additional changes to the request, the system doesn't create a copy of the request - it changes the original request. Currently, there isn't a way to copy requests.

6. Once you complete the necessary fields, choose one of the following

   - Click the **Save** button to save your work as a draft in your InfoPorte inbox without submitting it.

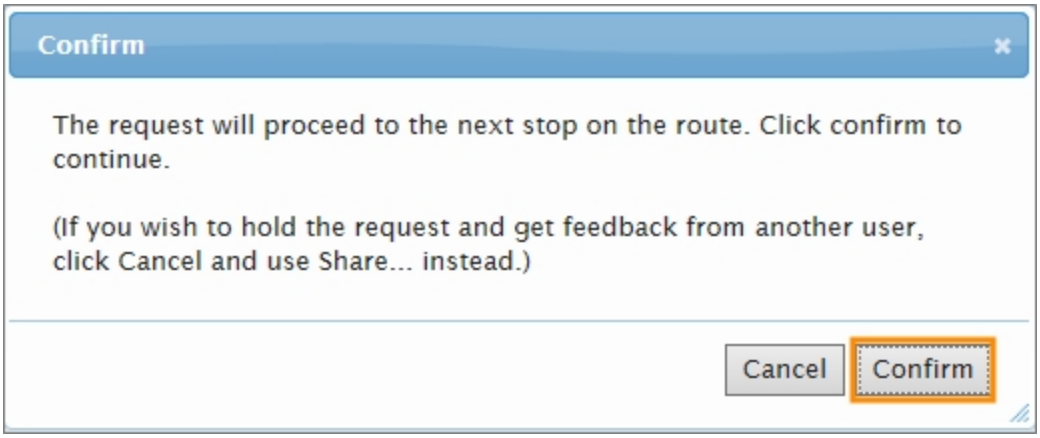
- Click the **Submit** button to submit your request to grant user access.



Results:

- InfoPorte checks the request for errors and highlights any errors in red.
- InfoPorte displays a message confirming your action.

7. Click the **Confirm** button to save or submit your request.



Result: After you confirm submitting the request, it routes to the appropriate teams for approval. Once all route stops approve the request, it moves to the appropriate security team, which grants access according to the details in the request.

Submitting Requests to Remove ARC Access

If an ARC or ARC Designator leaves the University (is terminated), his or her department needs to submit a request to remove the person's ARC access.

If an ARC or ARC Designator moves into a different role that doesn't require ARC access, his or her department needs to submit a request to remove the access.

> **Note:** If an ARC is transferring into a different school or division and will need to retain ARC access, the new school or division needs to submit an ARC Access request form signed by the new school or division's dean or vice chancellor (or ARC Designator) through the ARC Tool.

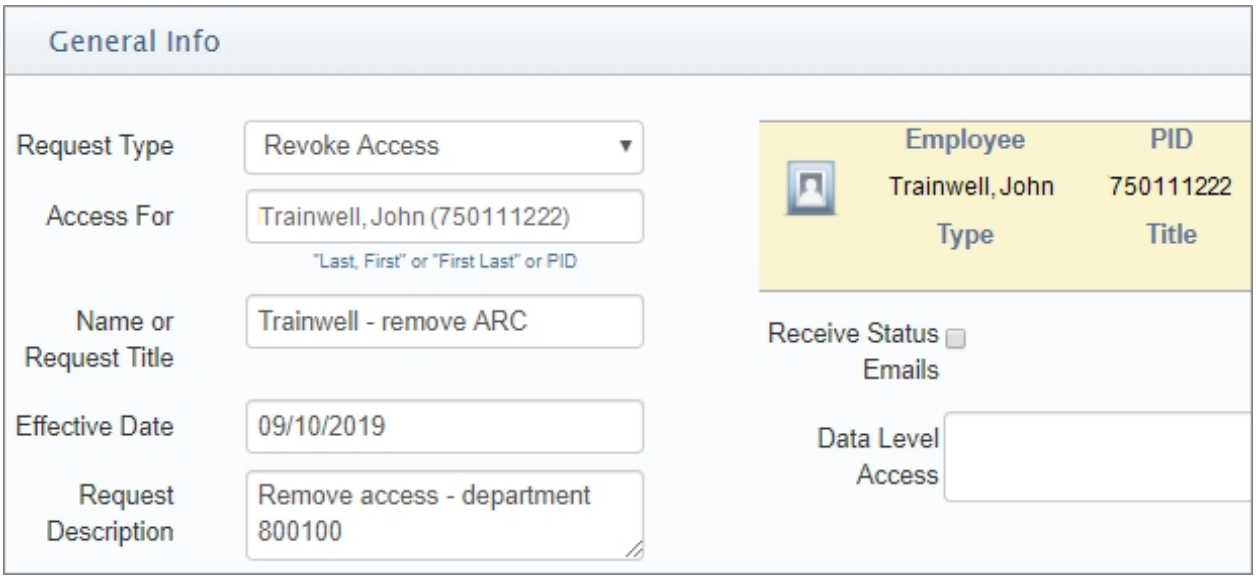
Follow these steps to submit a request to remove access:

1. Choose this menu option:

   InfoPorte Home Page > Tools > Access Request > Request Tool

2. Complete the fields:

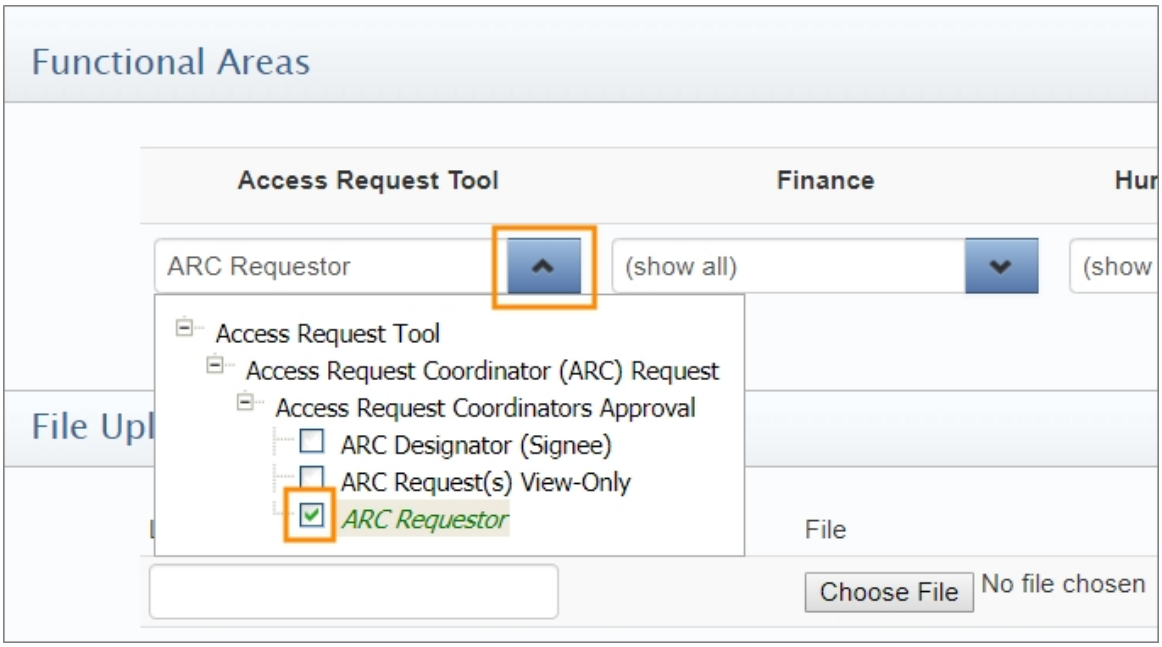
In this field:	Do the following:
Request Type	Choose **Revoke Access** to remove an ARC, ARC Designator, or to remove view-only access to see access requests.
Access For	Enter the person's name in the format *last, first* or *first last name*, or enter a PID. Results: • The access request form shows a list underneath the field of the people who match what you typed (sometimes it takes a few seconds). • When you enter a name or PID in the Access For field, the system displays the user's Name, PID, Onyen, Home Department ID, Type, Title, and contact information on the right side of the screen in the shaded area.
Receive Status Emails	Mark the checkbox if you would like to receive an email each time the request gets an update.
Name of Request Title	Enter a name that will help you find the request in your InfoPorte inbox and on reports, or one that meets your school or division's naming conventions.
Request Description	Enter any information that may be helpful or necessary for others during the approvals process.
Effective Date	Enter the date the removal should take effect.



3. In the **Access Request Tool** field, choose the roles you are removing for this user:

   a. Click the list box to display the roles available.

   b. Mark the checkboxes next to each role for which you are removing.



4. Follow these steps to upload a scanned image of the signed paper form to the request. (You can follow the same steps to attach any other documents you need to include with the request.)

   Note: You can upload files of sizes up to 16 megabytes in Word, Excel, PDF and plain text formats. You can also attach image files in .gif, .jpf, or .png formats.

a. In the Label field, enter the name of the document you want to attach. This name is how the document will display as a request attachment.

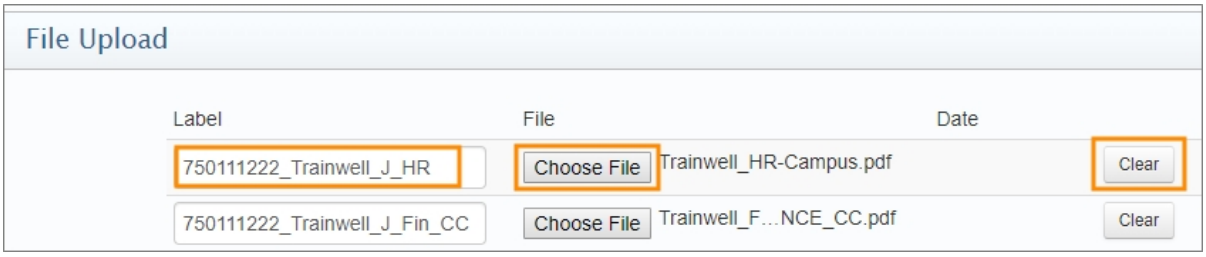
   Result: When you type in the Label field, a second blank row displays under the first one, allowing you to attach another document.

b. Click the **Choose File** button.

   Result: The Choose File to Upload window opens.

c. Select the document you want to attach and click **Open**.

   Result: The network path to the file you selected in the Choose File to Upload window displays in the File field.



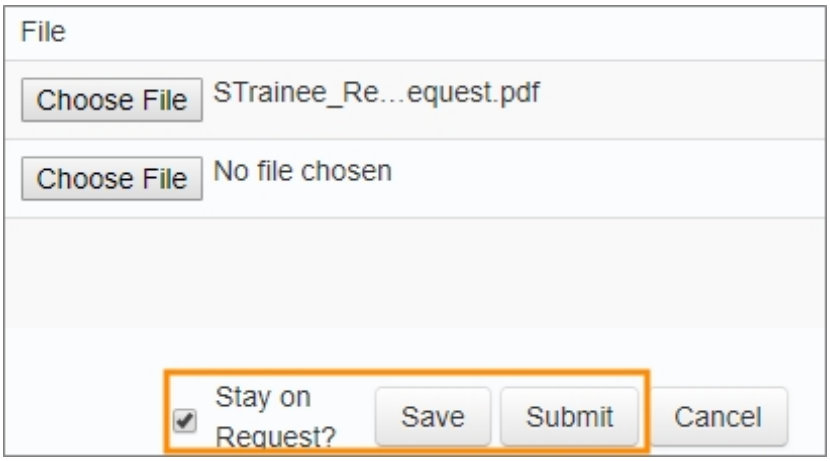
5. Repeat the steps above to attach more documents, if needed.

6. The Stay on Request checkbox is marked by default, which means that the request will stay open after you submit it. If you want to return to your inbox after you submit, unmark this box.

   Important: If you make additional changes to the request, the system doesn't create a copy of the request - it changes the original request. Currently, there isn't a way to copy requests.

7. Once you complete the necessary fields, choose one of the following

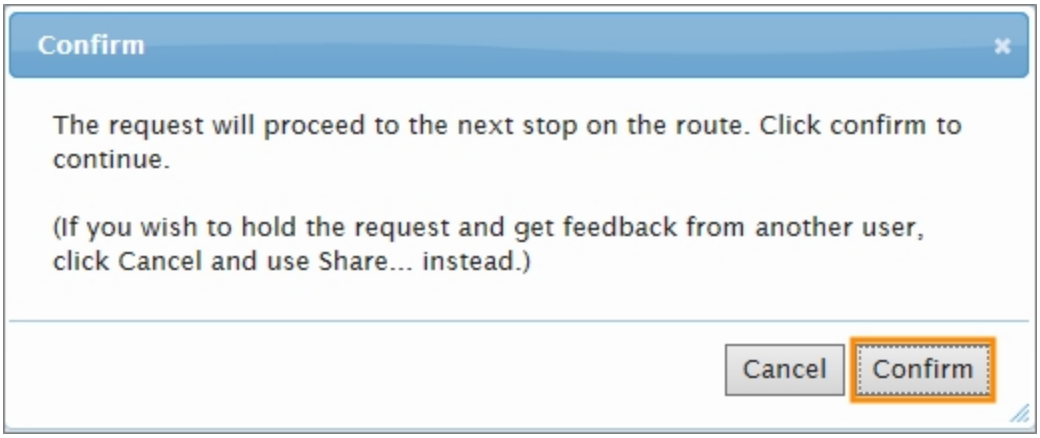
   - Click the Save button to save your work as a draft in your InfoPorte inbox without submitting it.
   - Click the Submit button to submit your request to remove user access.



Results:

- InfoPorte checks the request for errors and highlights any errors in red.
- InfoPorte displays a message confirming your action.

8. Click on the Confirm button to save or submit your request.



Result: After you confirm submitting the request, it routes to the appropriate teams for approval. Once all route stops approve the request, it moves to the appropriate security team, which revokes access according to the details in the request.