


# CS 9.2 - SACR Security: Student Financials

**Purpose:** Use this document as a reference for Securing Student Financials in ctcLink. All users with ZZ SF related security roles will likely also require this additional SACR Security setup in order for Student Financials page/components to properly function.

**Audience:** Managers approving security access for staff related to Cashiering or Student Financials and College IT Security needing clarity on the access requested.

 You must have the ZZ Local Security Admin or ZZ Local SACR Security Admin role for this navigation. For more information about these two roles, please refer to the [CS 9.2 All 'ZZ' Security Roles \(Processor\) QRG](#).

## Securing Student Financials

Access to a properly functioning Student Financials module is governed by 4 key SACR Security for Student Financials security controls:

- [Business Unit](#)
- [Institution Set](#)
- [Origin IDs](#)
- [SetID](#)

 When adding values for a user, you ***must FIRST assign those values to yourself as the Local Security Administrator.***

Also, if you see the warning message below asking to 'Please run the security SQR process' you may ignore this message. This only applies when a new Item Type has been added and is not needed to ensure the values entered are applied to the user.

The user will see them when the logout and log back in, so long as they have cleared their cache.

Message

You can ignore this message and simply click "OK" to clear it.

Security Change - please run security SQR process (14810,12089)

You have just made a change to the security setup. Please run the Student Financials security SQR process to ensure that the security settings are changed consistently throughout the system.

OK

**Warning:** When a user is attempting to establish their **User Defaults (Setup SACR > User Defaults)** on the second tab, if the **Business Unit** and **SetID** are not set, the system will turn the **SetID** field **red** and will throw an error that the user has entered an invalid value. Local Security Administrators (LSA) must **FIRST** set themselves with these values before they can assign it to another user. LSAs cannot access another user's **User Defaults** page, only the user can update these values for themselves.

## Business Unit Security

**Navigation: Set Up SACR > Security > Secure Student Financials > User ID > Business Unit**

1. Navigate to the Business Unit Search Criteria page.
2. Enter **User ID**.
3. Click **Search**.
4. If more than one Search Result is returned, click the link in the search results to select the User ID you wish to Add or Change SACR Security on.

Business Unit

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: User ID begins with

☐ Case Sensitive

Search Advanced Search

5. Enter the **Business Unit**, or click the Look Up (spy glass) icon to select.

- The **Access Code** defaults to Read/Write. If a college has more than one **Business Unit** and it is desired that the cashier explicitly NOT have access to a specific **Business Unit**, enter the Business Unit and set the **Access Code** to 'No Access.'

**Business Unit**

User ID 1

Business Unit  Find First 1 of 1 Last

\*Access Code Read/Write

Cashier's Office  Find View All First 1 of 1 Last

\*Access Code Read/Write

Save Return to Search Notify

**Look Up Business Unit**

Business Unit =  Description begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-9 of 9 Last

Business Unit	Description	Academic Institution
WA010	Peninsula College	WA010
WA030	Olympic College	WA030
WA110	Pierce College	WA110
WA130	Lower Columbia College	WA130
WA140	Clark College	WA140
WA171	Spokane Community College	WA171
WA172	Spokane Falls Community Coll	WA172
WA220	Tacoma Community College	WA220
WA300	Cascadia College	WA300

- Enter the Cashier's Office location, or click the Look Up (spy glass) icon to search for relevant locations. Each institution will have unique location values relative to that institution.
- To add extra Cashier's Office locations, click the Plus (+) symbol to add a new blank line.

**Business Unit**

User ID

Business Unit WA010 Peninsula College Find First 1 of 1 Last

\*Access Code Read/Write

Cashier's Office  Find View All First 1 of 1 Last

\*Access Code Read/Write

Save Return to Search Notify

**Look Up Cashier's Office**

Business Unit WA010

Cashier's Office begins with  Description begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-4 of 4 Last

Cashier's Office	Description	Campus Location	Code
FORKS	Forks ***	MAIN	MAINL
MAIN	Main	MAIN	MAINL
PCENTRAL	Pirate Central ***	MAIN	MAINL
PTOWN	Port Townsend ***	MAIN	MAINL

Click Plus (+) to ADD new rows for additional cashiering locations.

- To explicitly restrict a cashier from processing transactions for a specific location, add the Cashier's Office and set the Access code to 'No Access.'
- When done entering Business Units and Cashier Office values, click Save.

**Business Unit**

User ID

Find First 1 of 1 Last

Business Unit WA010 Peninsula College

\*Access Code Read/Write

Find View All First 1-4 of 4 Last

**Cashier's Office**

FORKS Forks \*\*\*

MAIN Main

PCENTRAL Pirate Central \*\*\*

PTOWN Port Townsend \*\*\*

\*Access Code

Read/Write

Read/Write

Read/Write

No Access

Save Return to Search Notify

To explicitly deny access to processing cashiering at a specific location, add that location and set the Access Code to 'No Access.'

## Peninsula College Cashier's Office Valid Values

Cashier's Office	Description	Campus	Location Code
FORKS	Forks ***	MAIN	MAINL
MAIN	Main	MAIN	MAINL
PCENTRAL	Pirate Central ***	MAIN	MAINL
PTOWN	Port Townsend ***	MAIN	MAINL

## Olympic College Cashier's Office Valid Values

Cashier's Office	Description	Campus	Location Code
MAIN	Main	MAIN	MAINL

## Pierce College District Cashier's Office Valid Values

Cashier's Office	Description	Campus	Location Code
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FTLEWIS	Fort Lewis	MAIN	MAINL
FTSTEILA	Fort Steilacoom	MAIN	MAINL
MAIN	DELETE	MAINL	MAINL
MCCHORD	McCord	MAIN	MAINL
PUYALLUP	Puyallup	MAIN	PUYALLUP

## Lower Columbia College Cashier's Office Valid Values

Cashier's Office	Description	Campus	Location Code
MAIN	Main	MAINL	MAINL
MAINAR	Main AR	MAIN	MAINL

## Clark College Cashier's Office Valid Values

## Spokane Community College Cashier's Office Valid Values

COLV	171 SPCC Colville Cashier Offi	MAIN	SMAIN
DIST1	171 SPCC District Office Cashi	MAIN	SMAIN
MAGN	171 SPCC Magnuson Cashier	MAIN	SMAIN
MAIN	MAIN	MAIN	SMAIN
NEWP	171 SPCC Newport Cashier Offic	MAIN	SMAIN
PARK1	171 SPCC Parking Cashier Offic	MAIN	SMAIN
REPU	171 SPCC Republic Cashier Offi	MAIN	SMAIN

## Spokane Falls Community College Cashier's Office Valid Values

COLV	172 SPCC Colville Cashier Offi	MAIN	FMAIN
DIST2	172 SPFL District Office Cashi	MAIN	FMAIN

FAIR	172 SPFL Fairchild Cashier Off	MAIN	FMAIN
MAIN	Main	MAIN	FMAIN
PARK2	172 SPFL Parking Cashier Offic	MAIN	FMAIN
PULL	172 SPFL Pullman Cashier Offic	MAIN	FMAIN

## Tacoma Community College Cashier's Office Valid Values

Cashier's Office	Description	Campus	Location Code
MAIN	Main	MAIN	MAINL

## Institution Set Security

**Navigation: Set Up SACR > Security > Secure Student Financials > User ID > Institution Set**

1. Navigate to the **Institution Set** Search Criteria page.
2. Enter **User ID**.
3. Click **Search**.
4. If more than one Search Result is returned, click the link in the search results to select the User ID you wish to Add or Change SACR Security on.

**Institution Set**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Search by: User ID begins with

☐ Case Sensitive

[Search](#) [Advanced Search](#)

5. Enter the Institution Set, or use the Look Up (spy glass) icon to search for and select the Institution (e.g. WA010).
6. Click Save.

**Institution Set**

User ID 101015999 Wang,Shao Wei

Find | View All First 1 of 1 Last

Institution Set	*Access Code
WA010 Peninsula College	Read/Write

To explicitly deny access to processing cashiering at a specific location, add that location and set the Access Code to 'No Access.'

Save Return to Search Notify

## Origin IDs

**Navigation: Set Up SACR > Security > Secure Student Financials > User ID > Origin IDs**

1. Enter the **Business Unit** (e.g. WA010).
2. Enter the **User ID**.
3. Click **Search** button if **User ID** has an entry for this page.
4. If no results are returned, click **Add a New Value** tab and click **ADD** button.

**Origin**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Business Unit = WA010

User ID begins with 101015999

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

5. Enter an **Origin ID**, or use the Look Up (spy glass) icon to search for the desired **Origin ID**.
6. Set the desired **Access Code** (Read/Write Access or No Access).

- To add additional rows, click the **Plus (+)** symbol and select additional **Origin IDs**.
- When done entering, click **Save**.

The screenshot shows the 'Origin' form with the following details:

- Business Unit:** WA010
- User ID:** 101013333
- \*Origin ID:** (Empty field with a search icon)
- \*Access Code:** Read/Write Access (Dropdown menu)
- Callout Box:** 'To explicitly deny access to processing cashiering at a specific location, add that location and set the Access Code to 'No Access.''
- Look Up Origin ID Dialog:**
  - SetID:** WA010
  - Origin ID:** begins with (Dropdown menu)
  - Buttons:** Look Up, Clear, Cancel, Basic Lookup
  - Search Results:**

Origin ID	Description
00001	Cashiering
00002	Financial Aid
00003	Library
00004	Bookstore
00005	Parking
00006	Housing
00007	Childcare
00008	Admissions Application
00099	Conversion

Value Values for Origin IDs are displayed below. These values are global in the ctclink system.

Origin ID	Description
00001	Cashiering
00002	Financial Aid
00003	Library
00004	Bookstore
00005	Parking
00006	Housing
00007	Childcare
00008	Admissions Application
00099	Conversion

## SetID Security

**Navigation: Set Up SACR > Security > Secure Student Financials > User ID > SetID**

- Navigate to the **SetID** Search Criteria page.
- Enter **User ID**.
- Click **Search**.



- If more than one Search Result is returned, click the link in the search results to select the User ID you wish to Add or Change SACR Security on.

**SetID**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

User ID begins with

☐ Case Sensitive

**Search** [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- Enter the **SetID** for the desired institution, or use the Look Up (spy glass) icon to search for and select the Institution (e.g. WA010).
- Accept the **Access Code** of Read/Write Access.
- Click **Save**.

**SetID**

User ID 1

[Find](#) | [View All](#) First 1 of 1 Last

SetID	*Access Code
WA010	Read/Write
Peninsula College	

**Save** [Return to Search](#) [Notify](#)

## Additional Cashiering Security

In addition to SACR Security for Student Financials cashiers will need to be added as a New Cashier and Assigned to a Valid Tender. Please refer to the Quick Reference Guide below for details:

- [9.2 Add a New Cashier and Assign to a Valid Tender](#)