Item Type Security

Purpose: Instruct college administrators with the ctcLink pages necessary to review and update item type access for staff who work with item types.

Audience: Staff, administrators, and managers utilizing item types for posting charges and payments in ctcLink. Staff (LSA's - Local Security Administrators) responsible for updating item type access in ctcLink.

ℹ️ This QRG contains two main drop downs below to take into consideration for item type security decisions. The first is associated with your institution's Item Type Tree, which is one method for reviewing and determining a staff member's item type access. The second is related to the ctcLink page used to give or take away item types per staff member.

⚠️ For employees that need access to Item Types, it is important that SetID Security is configured (if not already). Please refer to the [CS 9.2 - SACR Security: Student Financials](#) QRG to establish SF SetID Security for an employee.

Determine Item Type Access

❗ You must have at least one of these local college managed security roles:

- ZD Tree Viewer

  If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: Tree Manager > Tree Viewer

💡 What item types will this staff member need access to? Will they need a specific item type or a group of item types (called a *Node)?*

💡 The query QCS_SF_ITEM_TYPE_TREE_NODE may be used to also view your tree.

The query QCS_SEC_SACR_ITEMTYPE_OPR_DTL will give you detail on what access staff have for Item Types/Tree Nodes.

Assign/Remove Item Type Security

❗ You must have at least one of these local college managed security roles:

- ZZ Local SACR Security Admin
  - or
- ZZ Local Security Admin

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: Setup SACR > Security > Secure Student Financials > User ID > Item Type

1. The **Item Type** page displays.
2. Enter the **Business Unit** and the **User ID,** then select **Search.**
3. The Item Type security page displays.
4. To inactivate a previously dated row, select the **Correct History** button.
    A. Within the **Status** section of the page, select the **Status** drop-down and make the current **Effective Dated** row **Inactive**.

5. Select the **[+]** (plus) button under the **Status** section to add a new **Effective Dated** row.

⚠ Active Item Type Security should be the most recent Effective Dated row.

6. A new Effective Dated row appears (it is most common for the new row to have the current date).
    A. **Update** the **Status** of the new row to **Active**.

7. **Select** the appropriate **Item Type** or **Tree Node** button.
8. **Enter** the appropriate **Item Type** or **Tree Node**.
9. To **add** a new **Item Typ**e or **Tree Node** row, select the **[+] (plus)** button within the **Details** section.
    A. To **remove** a row, select the **[-] (minus)** button with the **Details** section.

10. Select the **Save** button.
11. Process complete.

ℹ After the item type security is adjusted for the user, it will take *effect* the next day. The process to set this security causes anyone actively navigating in the system to potentially get their work interrupted by a data integrity error pop up message. The State Board runs this process on a nightly basis at 5am, and it may not be run ad hoc.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to Item Type Security. This link will open in a new tab/window.

IT Audit and Control Information

Please use the information below to assist with your internal IT audits, controls, and segregation of duties.

 auditing-we-are-all-in-this-together-2023-07-.pptx