Getting Started

For Delegated Administrators

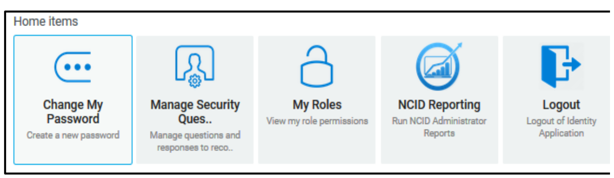
NOTE: Depending on your access level, your individual views of the new tile links may vary from the tiles depicted in this documentation.

Search for Employee Account

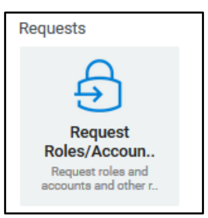
1. Log in to NCID.
2. The **Applications** tab opens on the Main Menu bar.
3. From the **Applications** tab, the system displays three rows of tiles:
   - Home Items Row
   - Requests Row
   - Administration Row

Home Items Row

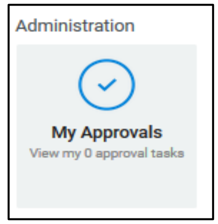
NOTE: These tiles have the same features as NCID's Home Page.



Requests – Requests Roles/Accounts



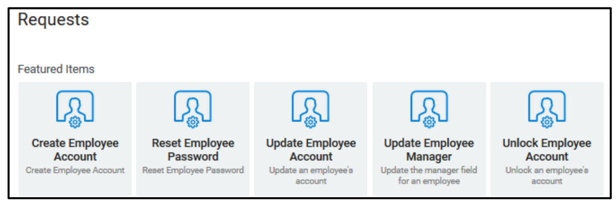
Administration Row – My Approvals



4. Under **Requests** row**, select Request Roles/Accounts.**
5. The system opens the **Access** tab of the Main Menu.

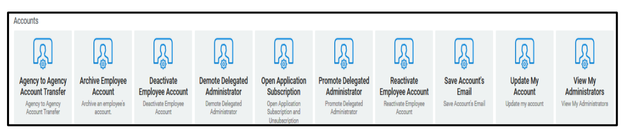
6. The system displays the **Requests** page with three rows of tiles:
   - Featured Items
   - Accounts
   - Roles

Featured Items Row

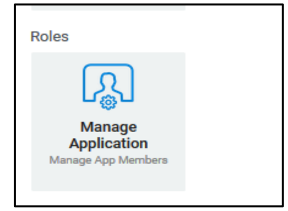


Accounts Row

NOTE: For the Accounts row, you may have a different set of tiles based on your access level.



Roles Row



7. In the **"Featured Items row, Requests,"** select **Update Employee Account.**
8. The system opens the **"Update Employee Account"** page**.**
9. Enter the search criteria in the **User Search Criteria** section.

10. Search by entering specific criteria into one or more of the available fields at this screen, and then click on the search tool:

11. The request form updates. The attributes are stored in the user's profile and display in the **User Search Result** section.

NOTE: If the section is outlined in GREEN, you can perform the action on the user account. If the section is highlighted in RED, you cannot perform action.

12. If this is the correct user account, you can continue to process the request, or you can clear the fields and perform your search again.

Requests – Featured Items

From the **Requests** page, view the first row of **Featured** Items, which are the most frequently used tile links for Delegated Administrators:

- Create Employee Account
- Reset Employee Password
- Update Employee Account
- Update Employee Manger
- Unlock Employee Account.

Create Employee Account

1. Select **Create Employee Account.**
2. The "Create Employee Account" request form displays.
3. Specify details about this new user.
4. Please note that any field that is followed by an asterisk (*) must be filled out.
5. At bottom of screen, select **Create User**.
6. Notify the user that the account was created, and provide the user with the temporary password. Remind the user that passwords are case-sensitive.

> **NOTE:** No email notification is sent to the user.

7. Inform the user that the new account will be removed from the system if he or she does not claim it and set it up within 14 days.
8. Instruct the user to claim the account by:
    - Logging in to NCID with the temporary password
    - Setting up challenge questions and responses
    - Changing password
    - Logging back into NCID.

Reset Employee Password

1. Ask the user to close all NCID connected applications (i.e.: Office 365; Beacon, etc.).

> **NOTE:** This will prevent password synchronization issues when the user logs back in with the new password.

2. Select the **Reset Employee Password** tile.
3. The "Reset Employee Password" request form displays.
4. Enter the user Search Criteria and search for the account you wish to modify.
5. Enter a temporary password in the **Password** field and re-enter it in the **Confirm Password** field.
6. At the bottom of the screen, select **Reset Password**.

Update Employee Account

1. Select the **Update Employee Account** tile.
2. The "Update Employee Account" request form displays.
3. Search for the account you wish to modify.
4. Make the appropriate changes.
5. At the bottom of the screen, select **Update Account.**

Update Employee Manager

1. Select **Update Employee Manager.**
2. The "Update Employee Manager" form displays.
3. Search for the Employee and the Manager account you wish to modify.
4. Make the appropriate changes.
5. At the bottom of the screen, select **Update.**

Unlock Employee Account

1. Select the **Unlock Employee Account** tile.
2. The "Unlock Employee Account" request displays.
3. Search for the account you wish to unlock.
4. At the bottom of the screen, select **Unlock**.

Accounts

The **"Accounts"** row and area includes options to further manage accounts:

> **NOTE:** For the "**Accounts**" row, you may have different tile names, or fewer or less tiles may display, based on your access level.

- Agency-to-Agency Account Transfer
    - Step 1 Performed by Originating Administrator
    - Step 2 Performed by Destination Administrator
- Deactivate Employee Account
- Archive Employee Account
- Reactivate Employee Account
- Demote App Administrator
- Demote Delegated Administrator
- Open Application Subscription
- Promote App Administrators
- Promote Delegated Administrator
- Manage App Members
- Update My Account
- View My Administrators
- Roles

Agency-to-Agency Account Transfer

Step 1 Performed by the Originating Administrator

1. Select the **Agency-to-Agency Account Transfer** tile. The "User Search Criteria" screen displays.
2. Search by entering specific criteria into one or more of the available fields, and then click on the search tool:

   Click to Search:

3. The request form updates. The attributes are stored in the user's profile and display in the **User Search Result** section.

> **NOTE:** If the section is outlined in **GREEN**, you can perform the action on the user account. If the section is highlighted in **RED**, you cannot perform action.

4. If this is the correct user account, you can continue to process the request for an Agency-to-Agency Account Transfer, or you can clear the fields and perform your search again.
5. Enter the appropriate information for the following fields:
   - **Destination Agency*** required field: Select appropriate Agency from pull down menu.
   - **Destination Division** * required field: Select from appropriate Division pull down menu.
   - **Destination Section**

   > **NOTE:** The **Destination Section** menu will be available if the user is moving to a Division that has one or more Sections.

   - **Transfer Valid for (Days)** – required field: Select **"X number 0 days"** from pull down menu.
6. After entering appropriate information, select **Transfer User**.

Step 2 Performed by the Destination Administrator

1. Access the "Transfer" request on the NCID Dashboard at the Main Menu.
2. Under MY TASKS, the system displays a list of tasks.
3. Select the appropriate task to expand and view details.
4. Select the **Claim** button, which alerts any other approvers that you are granting the approval.
5. After claiming the task, enter an email address for the user in the "Email" field.
6. You can enter the user's new address, if it is known, or you can enter what you anticipate it to be.

> **NOTE:** An incorrect email address will not impact the completion of the Transfer request. This field can be updated on the user's account profile, if the entered email is incorrect or changes.

7. Two additional action buttons are available at the bottom of the window: **Deny** and **Approve**.
8. Select **Approve** to complete the transfer process, or select **Deny** to cancel the request.
9. If **Deny** is selected, the employee's current administrator will receive an email notification and the transfer is cancelled.

Deactivate Employee Account

1. Select the **Deactivate Employee Account** tile.
2. The "Deactivate Employee Account" screen displays**.**
3. Search for the account you wish to deactivate.
4. Select **Deactivate**.

Archive Employee Account

> **NOTE:** The account must be deactivated before it can be archived.

1. Select the **Archive Employee Account** tile.
2. The "Archive Employee Account" screen displays.
3. Search for the deactivated account you wish to archive.
4. Filter User Search Criteria and search by entering specific criteria into one or more of the available fields, and then click on the search tool:

   Click to Search:

5. The request form updates and the attributes are stored in the user's profile and display in the "User Search Result" section.
6. Select **Archive**.

Reactivate Employee Account

1. Select the **Reactivate Employee Account** tile.
2. The "Reactivate Employee Account" screens displays.
3. Search for the account you wish to reactivate.
4. Select **Reactivate**.

Demote App Administrators

1. Select the **Demote App Administrator** tile.
2. The "Demote Application Administrator" screen displays.
3. Search for the account you wish to demote.
4. At the **Revoke Application Access Role** field, select the appropriate access role to demote.
5. Select **Demote from Application Admin**.

Demote Delegated Administrator

1. Select the **Demote Delegated Administrator** tile.
2. The "Demote Delegated Administrator" screen displays.

3. Search for the account you wish to demote.
4. If the selection for either "Roles in Organization," or "Roles in Division," and/or "Roles in Section" is changed, select **"Get Roles**" to retrieve the correct roles.

5. Select **Demote from DA Role.**

Open Application Subscription

1. Select the **Open Application Subscription** tile.
2. The "Open Applications Subscription" screen displays.
3. You may either subscribe to the Applications(s) or you may unsubscribe from the Applications(s).
4. To subscribe, and grant an application role, click on the pull-down menu and scroll to make an appropriate selection, and then select **Submit**.
5. To unsubscribe from an application or applications, select an application by clicking in the box next to it, and then select **Submit**.

Promote App Administrators

1. Select the **Promote App Administrators** tile.
2. The "Promote Application Administrator" screen displays.
3. Search for the account you wish to promote.
4. At the **Grant Application Access Role** field, select the role to promote.
5. Select **Promote to Application Admin**.

Promote Delegated Administrator

1. Select the **Promote Delegated Administrator** tile.
2. The "Promote Delegated Administrator" screen displays.
3. Search for the account you wish to promote.
4. If the selection for either the "Roles in Organization," or "Roles Division" and/or "Roles in Section" is changed, select **"Get Roles**" to retrieve the correct roles.

5. The system displays the following roles for you to retrieve the correct roles within your organization.
   - **Roles in Organization**: The name of the organization displays.
   - **Roles in Division:** The system displays the roles in the Division. Use the pull-down menu to select a different role.
   - **Roles in Section**: The system displays the roles in the Section. Use the pull-down menu to select a different role.
6. In the relevant pull-down menu, select the appropriate Delegated Administrator (**DA)** role to assign to the user.
7. In the **"Grant DA Role**" roles field, the system displays a DA role. Use the pull-down menu to select a different DA Role.
8. Select **Promote to DA.**

NOTE: If you need to choose a different Division/ Section, you must re-select the **Get Roles** button to obtain the roles associated with your new selection.

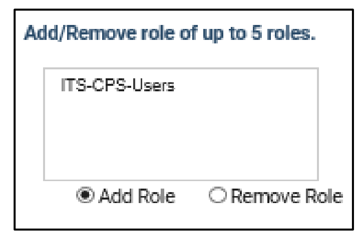
Manage App Members

1. Log in to NCID and select the **Applications** tab in the Main Menu.

IMPORTANT: To grant a user access to an application, you must locate the role which contains permissions to the application, and then assign the role to the user account.

2. In the "Requests" row, select "Request Roles/Accounts and Other Resources."
3. From the **Access** tab on the Main Menu, go to the **"Roles"** row and select the **Manage App Members tile**.
4. The system displays the "**Manage Application Members**" page and the "Manage Application Role" form.
5. Enter one or more of the search criteria for the employee account in the boxes and click the search icon.

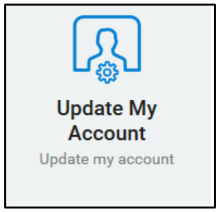
6. The system displays the results in the "User Search Result."
7. In the box, "**Add/Remove role of up to 5 roles,"** the system displays current roles and two buttons: "**Add Role"** and "**Remove Role**."



8. Locate the appropriate role.
9. Select the **Add Role** button to add the user account to the role, or click on **Remove Role** button to remove user account from the role.
10. Select the **Submit** button.

Update My Account

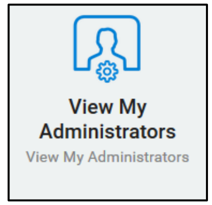
1. Select the **Update My Account** tile.



2. The system displays the “Update My Account” screen.
3. The system displays the following information:
    - Demographic Information
    - Contact Information
    - Manager Information
    - Account Information
    - Application Information
    - Account Status
    - Current Administrative Roles
4. Update any information that needs to be updated.
5. Click on **Update Profile**.

View My Administrators

1. Select the **View My Administrators** tile.



2. The system displays the following:
    - A list of administrators and their contact information
    - Division
    - Section
3. Select **Cancel** to leave the screen.

NOTES:

For comprehensive information, please refer to the *NCID Administration Guide.*

NOTE TO USER AUDIENCE:
Should you find a discrepancy in this document, please open a ticket with the NC DIT Help Desk dit.incidents@nc.gov and send your questions, document updates, or recommendations on improving the usability of this document.

https://files.nc.gov/ncdit/documents/files/NCID-NG-Administration-Guide.pdf