Getting Started

For Application Administrators

Before You Begin

> **NOTE:** When logging in to NCID from your desired browser, you must allow pop-ups. Please read your specific browser instructions.

> **NOTE:** You must be an Application Administrator to remove rights from a user account.

> **NOTE:** NCID screens and functions now display as selectable "tile links."

1. Log in to NCID and select the **Applications** tab in the Main Menu.
2. In the **Requests** row, select **Request Roles/Accounts and Other Resources.**
3. From the "Accounts" and/or the "Roles" rows, select one of the following three tiles to:

   - Promote App Administrator
   - Demote App Administrator
   - Manage App Members.

Promote Application Administrator

> **IMPORTANT:** Only an Application Administrator can promote and/or demote another user to the Application Administrator role.

1. Select the "**Promote App Administrator**" tile.
2. The "Promote App Administrator" screen displays.

3. In the "User Search Criteria" section, filter your search by entering specific criteria into one or more of the available fields for the account you wish to promote.

> **NOTE**: See instructions at the end of this document for assistance in searching for user accounts.

4. Select the **Search** icon.
5. The system displays an "Object Lookup" screen.
6. Select the appropriate account in the "User Search Result" screen to select the employee.
7. The request form is updated. Attributes stored in the user's profile will be shown in the "User Search Results" section.

> **NOTE:** If the section is outlined in **green**, you can manage the user account. If the section is highlighted in **red**, you cannot manage the account

8. The "Grant Application Access Role" drop-down menu displays a list of application roles to assign.
9. Use the pull-down and select the appropriate role.
10. Click on the "**Promote to Application Administrator**" button as applicable.
11. The system displays the successful submission.

Granting Application Access and Manage (Add/Remove Roles)

1. Log in to NCID and click on 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, click on the **"Request Roles/Accounts and Other Resources"** tile.

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 App 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.

> **NOTE**: See instructions at the end of this document for assistance in searching for user accounts.

6. The system displays the results in the "**User Search Result**" section and fields.
7. The system displays current roles of the employee account in the "**Member of:**" box. **The "Add Role or Remove role up to 5 roles"** area displays your administrator roles.
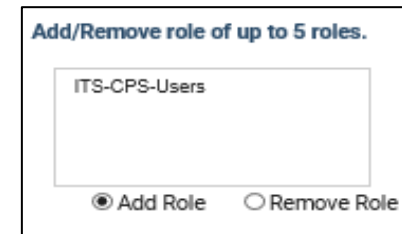
8. Locate the appropriate role.
9. Click on **Add Role** button to add the user account, or click on **Remove Role** button to remove user account from the role.

> **NOTE:** You can select up to five roles to add or remove from a user's account by using standard Windows selection keys.

10. Select the **Submit** button.
11. The system displays the successful submission.

Demoting a User Account from Application Administrator

If a user's responsibilities change, Administrator rights can be taken away by removing the Administrator roles(s) assigned to the user account.

1. Select the **Demote App Administrator** tile.
2. The "Demote App Administrator" screen displays.
3. In the **"User Search Criteria"** section, filter your search by entering specific criteria into one or more of the available fields for the account you wish to demote.

> **NOTE:** You must be an Application Administrator to remove rights from a user account.

4. Click on the **Search** icon.
5. The system displays an "Object Lookup" screen.
6. Click on the appropriate account in the **User Search Result** screen to select the employee.
7. The request form is updated. Attributes stored in the user's profile will be shown in the **"User Search Results"** section.

> **NOTE:** If the section is outlined in **green**, you can manage the user account. If the section is highlighted in **red**, you cannot manage the account

8. The "Revoke Application Access Role" drop-down menu will display a list of application roles to remove.
9. Use the pull-down and select the appropriate role.
10. Click on **Demote from Application Admin** button as applicable.
11. The system displays the successful submission.

Searching for a User Account

1. In any of the workflows that require you to search for a user's account, follow the steps below to find and select the appropriate user account.

2. The "User Search Criteria" section provides five user attribute fields to help you retrieve an account.
3. You can search by one field or you can perform multiple field searches.

> **NOTE:** The most effective way to retrieve an account is to search by the **User ID** field. Since every user has a unique ID, the results list will return only one account. This search operation saves you time by eliminating the task of scrolling through a lengthy list of results.

4. Specifying multiple search criteria is helpful in reducing your search results if you think a single field search would result in a very long list.
5. For example, searching for "Last Name" = Jones, might yield many matches, but if we include "First Name" = Andrew our result list would be reduced.

6. You may also specify a comparison operation to perform against your chosen attribute(s).
7. Each attribute has a drop-down menu to let you select one of the following values
   - Equals
   - Contains
   - Ends With
   - Starts With.

> **NOTE:** The system will prompt you to narrow the scope of the search if the number of results exceeds 200 entries**.**

8. The "Object Lookup" screen opens in a separate window and alphabetically displays a list of user accounts which match the search criteria you entered.
9. Click on the account you want to work with. The pop-up screen will close, and you will be returned to the workflow screen.

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.

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