

SEC-01 NCFS Security Request

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to describe the steps Agency Security Administrators and designated managers/requestors will follow to request that the OSC Security team add or remove employee security role(s) for access to the North Carolina Financial System (**NCFS**), as well as the process Agency Security Administrators will follow to approve agency requests in the NCFS Security Request System.

Introduction and Overview

A Security Request to create or change employee security access to the NCFS must be submitted to OSC by an Agency Security Administrator. The NCFS Security Request System allows agencies to submit agency approved employee security role requests prior to required training completion.

The OSC Security team will verify employee training completion before assigning the agency approved [NCFS Security Role\(s\)](#) according to the [800.2 - Request for Security Access - North Carolina Financial System \(NCFS\)](#) policy. Training exception requests must be submitted according to the policy and cannot be requested using the steps outlined in this document.

Create Security Role Request

The NCFS Security Request System will dynamically respond to typed data and selection options are based on your agency's usage of NCFS. If an agency does not use certain elements of NCFS [Example: Agency does not use Inventory], then those will not show in the list for that agency. Some fields allow multiple entries, as appropriate.

The system will prompt you with new fields for any additional entries required for a specified role, such as the Business Unit Access or Asset Book. These fields may show agency level or statewide options.

- Example: Warehouse Org will only list the options available to that agency.
- Example: Asset Book will list all agencies/divisions because some agencies need multi-agency access, so be sure to choose carefully.

If you are an Agency Security Administrator or designated manager or requestor, please follow the steps below. There are 14 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials.

Step 2. On the **Home** page, click the **NCFS Security** tab and then the **Security Request System** app.

Step 3. Click on the **Create Request** button to create a new request, which opens the NCFS Security Request Form.

Step 4. On the right side at the bottom of the Employee Information box, search by personnel number or name for the employee for whom you are making the security request. Verify that you have selected the correct employee **in your agency**.

Image



NCFS Security Request Form

NCFS Form SEC02

Requestor: SMITH CARROLL

Organization: 3000 DHHS MENTAL HEALTH
Department: HHS SO SOHF CDC PA RS RH OMEGA
1&2 SHF
Request Date: 07/25/2023
Work Phone: 410-740-0200
Email: sendmail-test-discard@oracle.com

Employee Information

Employee Name:
Email:
Phone:
HR/Payroll Personnel:

Employee Name or Number **I** 

Comments

Step 5. Optional: Scroll down to the Comments field and add any comments you would like to include with the request.

Step 6. All fields in the **Request Roles** section are required. First, click the radio button for **Add Roles** or **Remove Roles** in the **Request Action** field. Note: It is critical to remove security roles promptly for employees who should no longer have access to NCFS.

Image



All fields in this section are required

Request Roles

Request Action

Add Roles ☐

Remove Roles ☐

Required

Role Requested

Required

Please select your Security Admin(s) for approval.

Security Admin

Add Request Row

Step 7. In the **Role Requested** field, select the first security role the employee needs. (Each security role must be added separately before submitting.) The highest level required training course required for that role will be listed below the Role Requested box. Visit the [NCFS Security Roles](#) page to see the full list of security roles and all required courses and prerequisites.

Step 8. After you select a security role, the **Business Unit Access** field will appear so that you can choose the applicable Business Unit.

Image

NCFS Security Request

Request Action

Add Roles ☒

Remove Roles ☐

Role Requested
NC GL Journal Post JR

Required Class: NAV100

Business Unit Access Required

Please select your Security Admin(s) for approval.

Security Admin

Add Request Row

Request Date: 07/25/2023

Request #: New

Step 9. Next, select the **Agency Security Admin(s)** to whom you want to submit your request. As a requestor, you can choose multiple Security Administrators based on your agency's recommended procedures. If you are an Agency Security Administrator generating the request, select your own name.

Step 10. Click the **Add Request Row** button.

Step 11. Optional: Add any additional security roles for the **same employee** before submitting the request.
Note: Requesting multiple security roles may generate an SOD Conflict Warning message and your Security Administrator or the OSC Security team may not approve an employee for conflicting roles.

Image

The screenshot shows the NCFS Security Request web application. A red box highlights a yellow warning message: "SOD Conflict" with the text "Warning -GL Journal Post & AP Invoice Management is an SOD Conflict". Below the warning, a "Security Admin" dropdown menu shows "Jaques Waugh" as the selected administrator. The user email "sendmail-test-discard@oracle.com" is displayed. A blue "Add Request Row" button is visible. Below a horizontal line, the "Request Date" is "07/25/2023" and the "Request #" is "New". A table lists the requested roles:

Request Action	Role Requested	Business Unit Access	Asset Book	Warehouse Org.	Control Budget	Reference Data Set	Required Classes	Line Status	Remove Role
Add Role	GL Journal Post	2000					NAV100	Pending	✕
Add Role	AP Invoice Management	2000					NAV100	Pending	✕

At the bottom right, the "Selected Approvers:" section lists "Jaques Waugh" with a "Create Approval Request" button and a "Save as Template" button.

Step 12. Before submitting the request for approval, please note the **Requested Classes** and **Line Status** columns which show the required training (which may have prerequisites) for the requested [NCFS Security Role](#).

The validated statuses are:

- **Pending:** Final course has not been requested/started.
- **In Progress:** All required courses for this role have been completed and the assignment of the role is In Progress.
- **Completed:** The role has been assigned to the employee and line is completed.

Image

The screenshot shows the NCFS Security Request interface. At the top, there's a header with the NCFS logo and the text 'NCFS Security Request'. Below this, there's a section for 'Security Admin' with the name 'Jaques Waugh' and a close button. The email address 'sendmail-test-discard@oracle.com' is also visible. A blue button labeled 'Add Request Row' is present. Below this, there's a section for 'Request Date: 07/25/2023' and 'Request #: New'. The main part of the interface is a table with the following columns: Request Action, Role Requested, Business Unit Access, Asset Book, Warehouse Org., Control Budget, Reference Data Set, Required Classes, Line Status, and Remove Role. There are two rows of data in the table. The first row has 'Add Role' in the Request Action column, 'GL Journal Post' in the Role Requested column, '2000' in the Business Unit Access column, and 'NAV100' in the Required Classes column. The Line Status for this row is 'Pending'. The second row has 'Add Role' in the Request Action column, 'AP Invoice Management' in the Role Requested column, '2000' in the Business Unit Access column, and 'NAV100' in the Required Classes column. The Line Status for this row is also 'Pending'. A red box highlights the 'Required Classes' and 'Line Status' columns for both rows. At the bottom right, there's a section for 'Selected Approvers:' with the name 'Jaques Waugh' and two buttons: 'Create Approval Request' and 'Save as Template'.

Request Action	Role Requested	Business Unit Access	Asset Book	Warehouse Org.	Control Budget	Reference Data Set	Required Classes	Line Status	Remove Role
Add Role	GL Journal Post	2000					NAV100	Pending	⊗
Add Role	AP Invoice Management	2000					NAV100	Pending	⊗

Step 13. Click the **Create Approval Request** button to submit the request to add or remove security roles for the selected employee.

Note: these requests will be bundled together and can only be approved or denied together.

Image

NCFS Security Request

sendmail-test-discard@oracle.com SC

Security Admin: Jaques Waugh x

sendmail-test-discard@oracle.com

Add Request Row

Request Date: 07/25/2023 Request #: New

Request Action	Role Requested	Business Unit Access	Asset Book	Warehouse Org.	Control Budget	Reference Data Set	Required Classes	Line Status	Remove Role
Add Role	GL Journal Post	2000					NAV100	Pending	
Add Role	AP Invoice Management	2000					NAV100	Pending	

Selected Approvers:
Jaques Waugh

Create Approval Request

Save as Template

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Step 14. Periodically review your **In-Progress** tab in the **Security Request System** to see whether the status has changed for any requests.

- You may edit Denied requests to make necessary corrections and resubmit.

- Approved requests generate a notification to the OSC Security team. The OSC Security team will not assign the agency approved security role until the employee has successfully completed all required training, so please follow up with employees to ensure training courses are completed in a timely manner.

Image

Welcome, SMITH CARROLL

Create Request

In-Progress History Templates

Requests In-Progress

Request Date Request Number Requestor

Request Date	Request Number	Requestor Name	Approver Name	Employee Name	Employee ID	Request Status	Copy	Edit
07/25/2023	100000903	SMITH CARROLL	Jaques Waugh	MORRISSA HIGHSMITH	01245806	Denied		
07/10/2023	100000901	SMITH CARROLL	Jaques Waugh	SMITHA AMOS	00065181	Approved		

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Agency Security Administrators Approve/Deny Requests

As an Agency Security Administrator, please follow the steps below. There are 4 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials.

Step 2. On the **Home** page, click the **NCFS Security** tab and then the **Security Request System** app to review any pending requests in the **Requests Pending Approval** tab.

Step 3. Optional: Click on the number in the **Request Number** column to open and review a request before approving or rejecting.

Image

The screenshot displays the NCFS Security Request portal interface. At the top, the header includes the NCFS logo, the text 'NCFS Security Request', the email 'sendmail-test-discard@oracle.com', and a user profile icon labeled 'JWV'. Below the header, a welcome message 'Welcome, JACQUES WAUGH' is shown. A 'Create Request' button is located in the top right. The main navigation tabs are 'Pending Approval', 'Approved', 'History', and 'Templates', with 'Pending Approval' being the active tab. The section title 'Requests Pending Approval' is displayed. Below this, there are search filters for 'Request Date', 'Request Number', 'Requestor', and 'Approver'. The main content area features a table with the following columns: Request Date, Request Number, Requestor Name, Approver Name, Employee Name, Employee ID, Request Status, Approve, and Copy. Two rows of data are visible, both with a status of 'New'. The 'Request Number' column and the 'Approve' column are highlighted with red boxes. The first row has a request number of 100000903 and a request date of 07/25/2023. The second row has a request number of 100000901 and a request date of 07/10/2023. The 'Approve' column contains icons for approving and rejecting requests. The footer of the page states 'State of North Carolina, Copyright @ 2023'.

Request Date	Request Number	Requestor Name	Approver Name	Employee Name	Employee ID	Request Status	Approve	Copy
07/25/2023	100000903	SMITH CARROLL	Jaques Waugh	MORRISSA HIGHSMITH	01245806	New		
07/10/2023	100000901	SMITH CARROLL	Jaques Waugh	SMITHAAMOS	00065181	New		

Step 4. Click the arrow icon in the **Approve** column to review the request and choose to **Deny Current Request** (red button on left) or **Approve Current Request** (green button on right).

- Denied requests go back to the requestor, so it may be helpful to include comments explaining the reason for denial. The requestor may edit the request to make any necessary corrections and resubmit.
- Approved requests are removed from the Pending Approval tab and generate a notification to the OSC Security team. The OSC Security team will not assign the agency approved security role until the employee has successfully completed all required training.

Image

The screenshot displays the 'NCFS Security Request' form. At the top, the header includes the NCFS logo, the title 'NCFS Security Request', the email 'sendmail-test-discard@oracle.com', and a user icon labeled 'JVV'.

Requester Information:

- Department: HHS SO SOHF CDC PARS RH OMEGA 1&2 SHF
- Request Date: 07/25/2023
- Work Phone: 410-740-0200
- Email: sendmail-test-discard@oracle.com

Requestor Information:

- Email: sendmail-test-discard@oracle.com
- Phone: 218-220-0587
- HR/Payroll Personnel: 01245806

Comments:

needs security roles asap x
SOD conflict - same employee cannot have both roles

Request Date: 07/25/2023 Request #: 100000903

Request Action	Role Requested	Business Unit Access	Asset Book	Warehouse Org.	Control Budget	Reference Data Set	Required Classes	Line Status
Add Role	GL Journal Post	2000					NAV100	Pending
Add Role	AP Invoice Management	2000					NAV100	Pending

At the bottom right, there are two buttons: 'Deny Current Request' (red) and 'Approve Current Request' (green), both highlighted with a red border.

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