Student Administration Instruction Document

Module:	Academic Advisement
Business Process Name:	**Advising Roles Security Approval**
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Requesting Security

New security needs to be requested via the Access Provisioning Tool (APT) at
https://eds.arizona.edu/uaccess_appreq/. Users can also utilize the APT to monitor security requests and request the removal of security.

Once a security request has been submitted it will follow the proper channels of review until it is either approved or denied. The requester will get an email once a request receives final approval or denial.

Questions regarding security may be directed to the Academic Advising Student Administration team business analysts or to the Enterprise Applications Security Team (EAST) at UITS-EASecurityTeam@email.arizona.edu.

If you are requesting advising security for an individual whose title is not Academic Advisement please provide justification for the security in the comments section to ensure the timeliest processing.

Security Terminology

When requesting security for advisors the more specific you are the quicker the request will move through the approval process. To help with the specifics here are some key terms that will make your request more detailed.

Role & Row Level Security: Roles provide a user permissions to access a particular area of UAccess Student, whereas row level security provides access to specific values or actions on a given page. For example, users gain access to update the Manage Service Indicators page through the Service Indicator Update role. However, the specific service indicators an advisor has access to update (place or release) is row level security, and is typically requested in conjunction with the role providing access to the page. So an advisor might be able to view service indicators from the Manage Service Indicator page, but only have row level security to release transfer and mandatory advising service indicators.

Advising Composites

You can simplify the security request process by selecting composite roles. Composites encompass security roles that are generally assigned to users, in this case academic advisors. Please note, some roles may need to be requested in addition to the composites for an advisor to have all the access he/she needs.

Composite - Academic Advising College Director: This role should be selected for individuals fulfilling the responsibilities of the college advising coordinator/director. This composite grants access for Academic Advising Directors of the academic colleges who need access to run Advisement Reports, update Advisor Notes, Student Program/Plan, Advising Service Indicators, Student Exceptions, students' DegreeTracker/SmartPlanner preferences and Advisor Assignments.

Composite - Academic Advisor (Department or College): This role should be selected most professional advisors who are not faculty or performing higher level functions in UAccess. This composite grants access for Academic Advisors in academic departments and colleges who need the ability to run Advisement Reports, update Advisor Notes, students' DegreeTracker/SmartPlanner preferences, and view Advisor Assignments. Also includes view security for 3Cs (comments, checklists, commuincations), milestones, student groups and service indciators.

Please note that this composite does **_not_** include exceptions update security. If an advisor should have the ability to enter exceptions you will need to request *Role - Advising Exceptions* in tandem with the composite.

Common Advising Roles Not Included in the Departmental / College Composite:
The following roles are common advising roles that are no included in the Academic Advisor (Department or College) composite, so they need to requested in tandem with the composite if you want the advisor to have access. These roles can be found in the APT under **UAccess Student – Campus Users > Academic Advising**.

- *Advising Exceptions*: Allows users to input, edit, and view student exceptions. This role is only provisioned to approved users upon completion of the in-person Academic Advising Advanced Training.

- *Curriculum Requester*: Grants access to submit curricular (Advisement Report) updates. Should be requested for those in departments or colleges that will be inputting the desired updates in to the UAccess Curriculum mod.

- *Program/Plan Update*: Allows users to update students' programs, plans, and requirement terms (i.e. change majors).

- *Student Group User*: Allows user to add and remove students from Student Groups. When requesting student group access please specify what row level security a user should have (i.e. what specific student groups the user should be able to update).

- *Service Indicator Update*: Allows user to add and/or release service indicators. If an advisor only needs to view Service Indicators, they will receive the *Service Indicator View* role as part of their base admin view access. When requesting service indicator update access please specify what row level security a user should have and whether they should be able to place, release or perform both functions for each specific type of service indicator.
    - *AFR*: Allows user to add and/or remove first year advising service indicators. This service indicator has specific reasons available to each college so please specify to which college's holds the user should have access.
    - *AMD*: Allows user to add and/or release major declaration service indicators. This service indicator has specific reasons available to each college so please specify to which college's holds the user should have access.
    - *APR*: Allows user to add and/or release academic standing service indicators. This service indicator has specific reasons available to each college so please specify to which college's holds the user should have access.
    - *AMA:* Allows user to add and/or release mandatory advising service indicators. This service indicator has specific reasons available to each college so please specify to which college's holds the user should have access. In addition, the AMA service indicator includes orientation-type holds so please specify if the user should have the following:
        - *RADND*: Allows user to release re-admit service indicators; advisors should never be approved to place RADND service indicators.
        - *TRAN*: Allows user to release transfer service indicators; advisors should never be approved to place TRAN service indicators.

- *Transfer Credit Requirement Designator Course Update:* Needed by a small group of advisors in College of Science departments to assign requirement designations to commonly transferred science courses such as Introductory Chemistry and Physics. This role is only provisioned to approved users upon completion of the in-person Requirement Designation Transfer Credit Training.

Non-Advising Security Advisors Might Need:
- *Enrollment Security*: These roles can be found in the APT under **UAccess Student – Campus Users > Student Records.**
  - Role - Department User: Allows users to manage enrollments for a specific, identified department. Role - College User
  - Role – College User: Reserved, generally, for advising coordinators. Allows override of enrollment limits and update permission for academic standing.

- *Student Milestones***:** These roles can be found in the APT under **UAccess Student – Campus Users > Student Records**.
  - Role - Milestone User: Provides access to update student milestones.

Advising Roles for Non-Advisors:
The following roles may be appropriate for program coordinators, administrative associates, students workers, or other non-advising depending on job title and their responsibilities. While all security requests undergo review, requests for advising security for non-advisors are more thoroughly reviewed. If requesting these or any advising roles for non-advisors please include thorough justification for the security in the comments field in the APT.

- *Academic Agreements*:
  - *Role - Agreement Coordinator*: This role is reserved, generally, for Advising Coordinators and grants them permission to manage college default stipulations and messaging for Academic Agreements. This security is included in the Advising College Director Composite.
  - *Role - Agreement Update*: Grants security to update and view Academic Agreements. This security is included in the Academic Advisor (Department or College) composite as well as with the Advising Update Role.
  - *Role - Agreement View*: Grants security to view Academic Agreements.

- *Advising Update*: This role allows advisors to input advising notes, generate ADVIP, NONAC, PLNNR, and WHTIF reports, update Academic Agreements, and view Advisor Assignments. This role is only provisioned to approved users upon completion of the online Academic Advising Basics Training.

- *Advising View*: Provides access to view advisement reports for active students via Student Services Center. This role is provisioned to all student administration users who request access to view student data. This may be all that someone needs if they request "advising access."

- *Advisor Assignment Update:* This role is reserved, generally, for Advising Coordinators and grants access to maintain the advisor table and student advisor assignments. This security is included in the Advising College Director Composite.

- *Composite - Basic View*: Grants access for faculty advisors who do NOT require update to advisor notes or exceptions, but rather whose job responsibilities require VIEW access to all areas of student data, including advising, admissions, campus community, financial aid, student financials, student records, and transfer credit. Provides access to all tabs of the Student Services Center.

- *Degree Audit Report Run Only*: This role allows faculty advisors or non-advisors to generate ADVIP, NONAC, PLNNR, and WHTIF reports if they do not need access to Advisor Notes.

- ***Degree Tracker Advisor***: The DT Advisor Role allows users to access the Smart Planner along with the ability to use the "Select" link to choose courses, use the "Add Course for 2nd Major or Minor" link, rearrange the students' courses around using the "Arrange My Plan" page, to unlock and lock courses on the Main Smart Planner page, view the Smart Planner report page, adjust semesters and units using the "Edit Preferences" page, and to create a What-If Smart Planner scenario. This role is included in the Academic Advising College Director and Academic (Department or College) composites.