SARA Source Operational Handbook for Institutions

(Date:2/10/2022)

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OVERVIEW

Welcome to the *SARA Source Operational Handbook for Institutions.* This handbook will provide you with important information about navigating through the system so that you can perform administrative functions and operational functions and access reports.

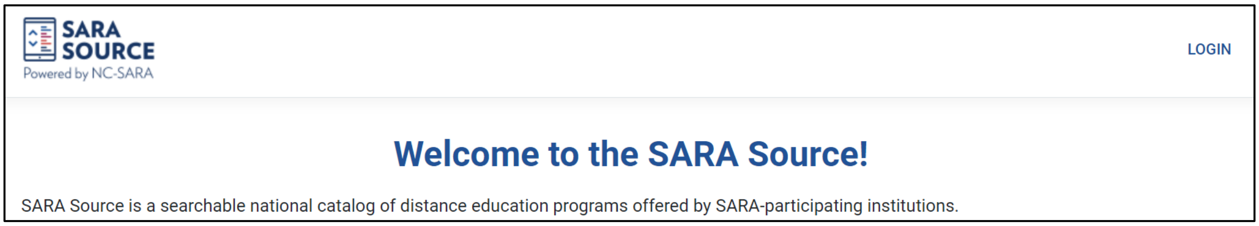
This guide is divided into sections for the different Institutional level roles that are available in SARA Source, namely:

- Institutional Operation Administrator
- Institutional Program Administrator
- Institutional Report Viewer

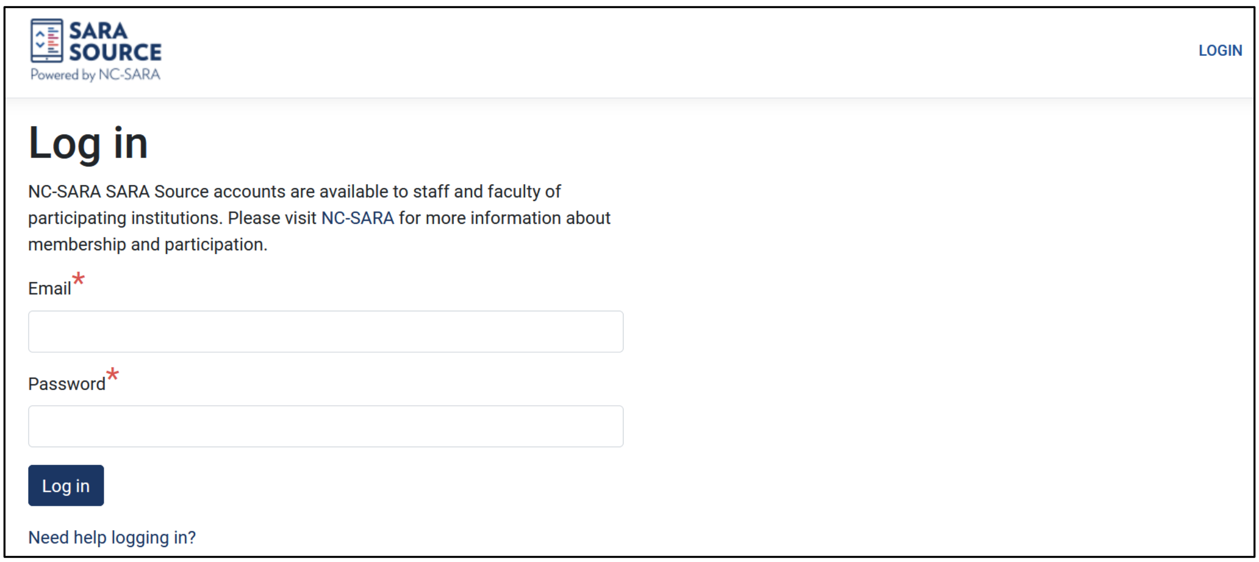
INSTITUTIONAL OPERATIONS ADMINISTRATOR

LOGGING INTO THE SYSTEM AND VIEWING YOUR DASHBOARD

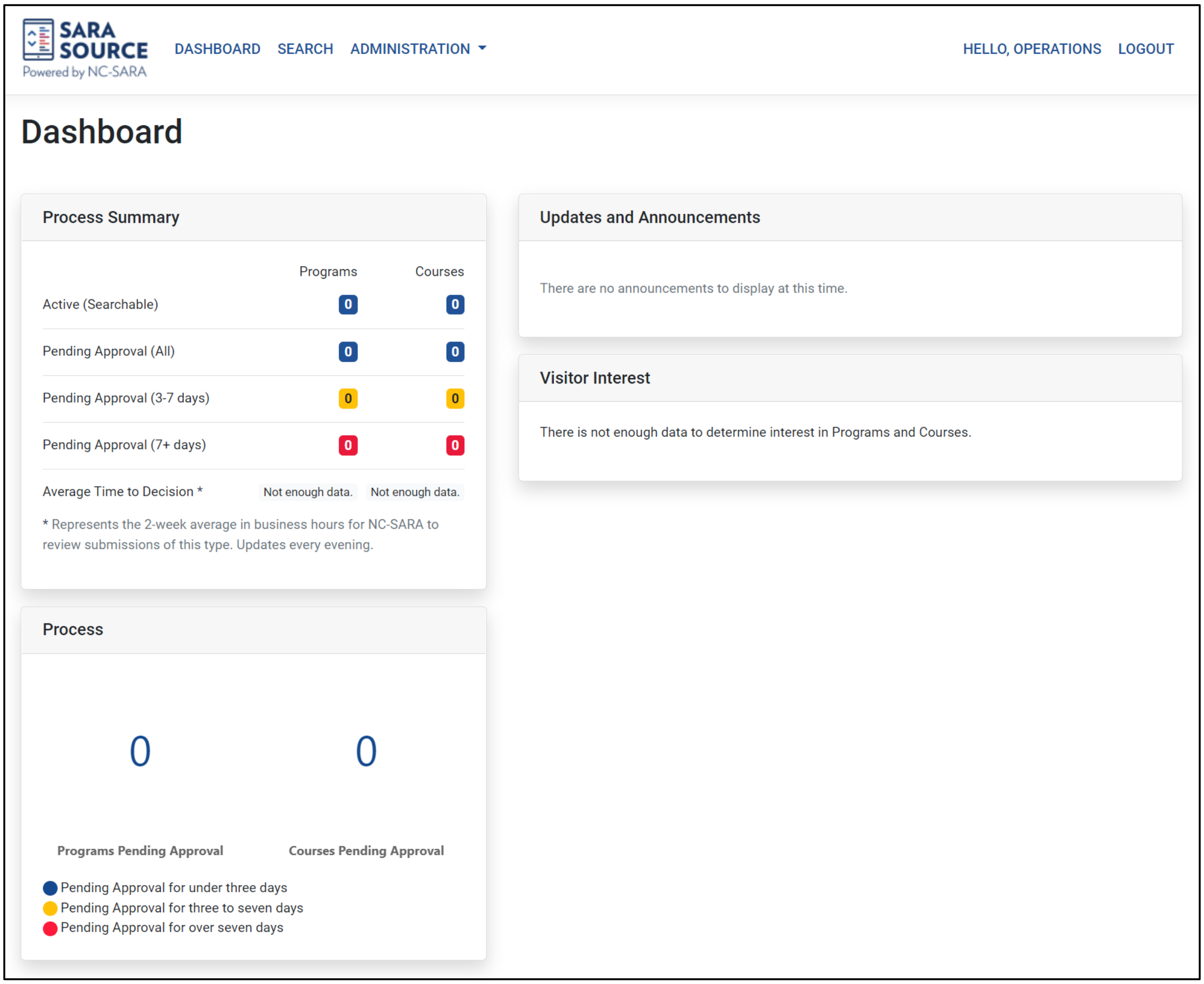
As an Institutional Operations Administrator, you are initially directed to the following screen where you will login by clicking the **Login** link located in the header.



After clicking the link, the following screen appears where you are asked to provide your username and password:



After logging in, you are brought to the home screen which displays the Operation Administrative Dashboard. Here you will see important summary information for your institution. At the top of the page, you will see your username which confirms that you are logged in. At this time only programs are included in the SARA Source.



You will be able to manage accounts and determine institution settings.

The dashboard includes the Process Summary, Process, Updates and Announcements and Visitor Interest sections.

In the **Process Summary** section, you will see metrics related to each category. Details for each of the Programs categories can be accessed by clicking on that line.

The **Process** section will show the total number of programs currently in process and visually represent values in three time ranges.

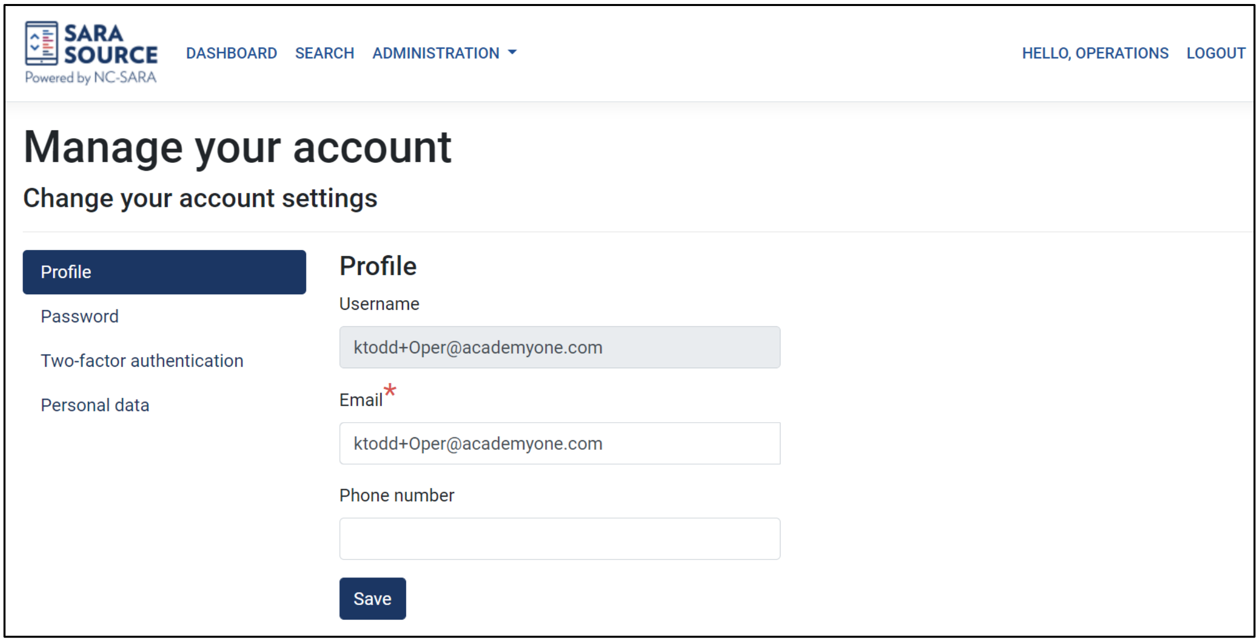
The **Updates and Announcements** section will alert you to new information about SARA Source.

The **Visitor Interest** section will alert you to data on programs visited on the public site.

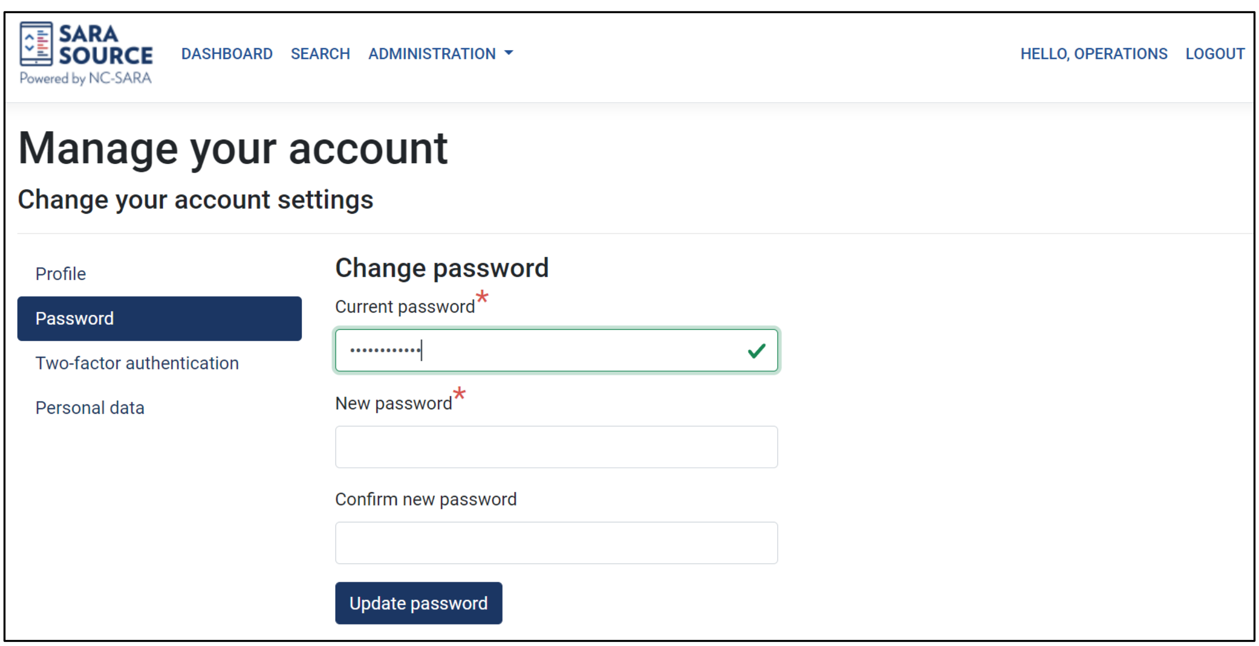
MANAGING YOUR ACCOUNT

Clicking your username in the top menu bar provides you with the option to manage your account.

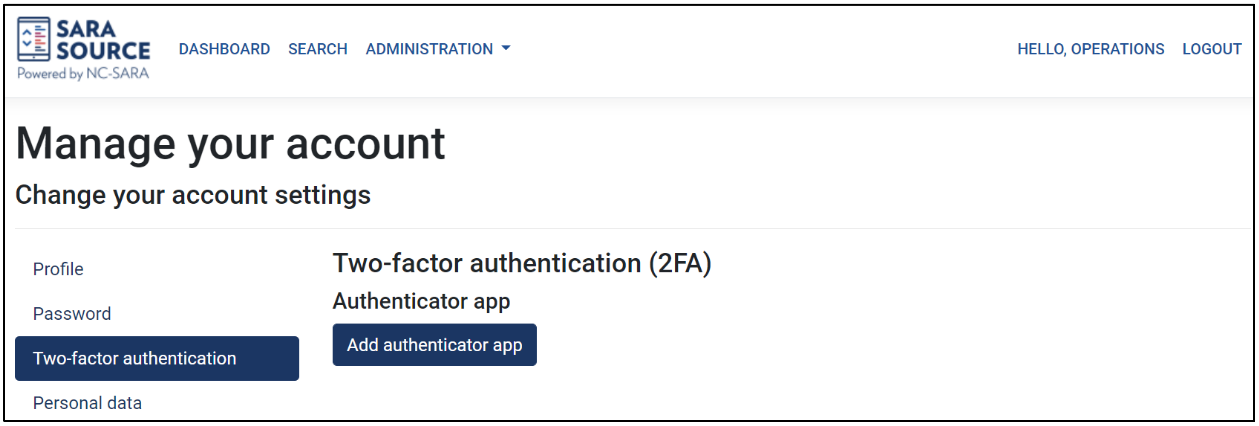
By clicking on **Manage My Account** under your username, you will be brought to the following page where you can modify your Profile information and access Password information, Two-factor authentication and Personal data pages. Required fields are marked with a red asterisk. You are not required to supply updated password information every time you update your account.



Once you have made your changes, click the **Save** button to save them.

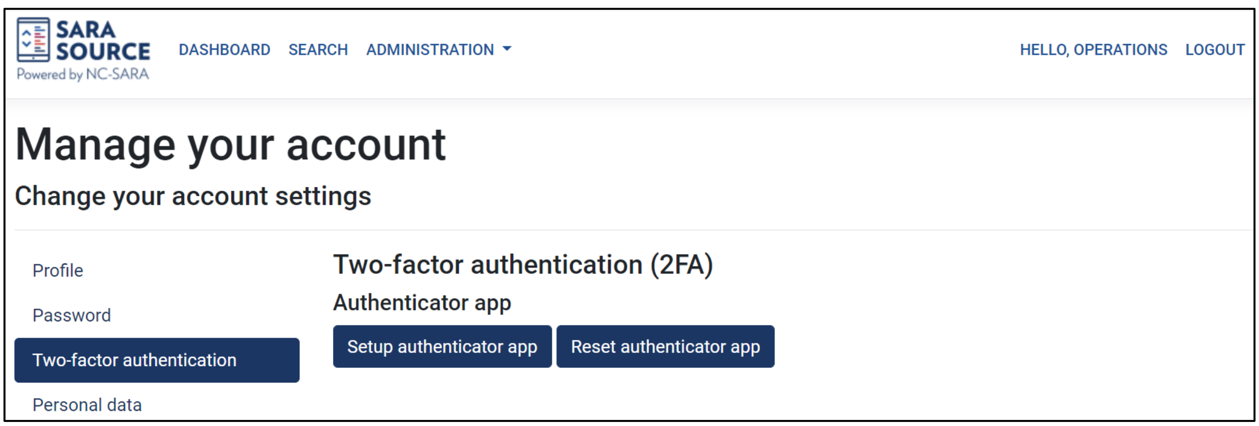


Once you have made your changes, click the **Update password** button to save the new password.



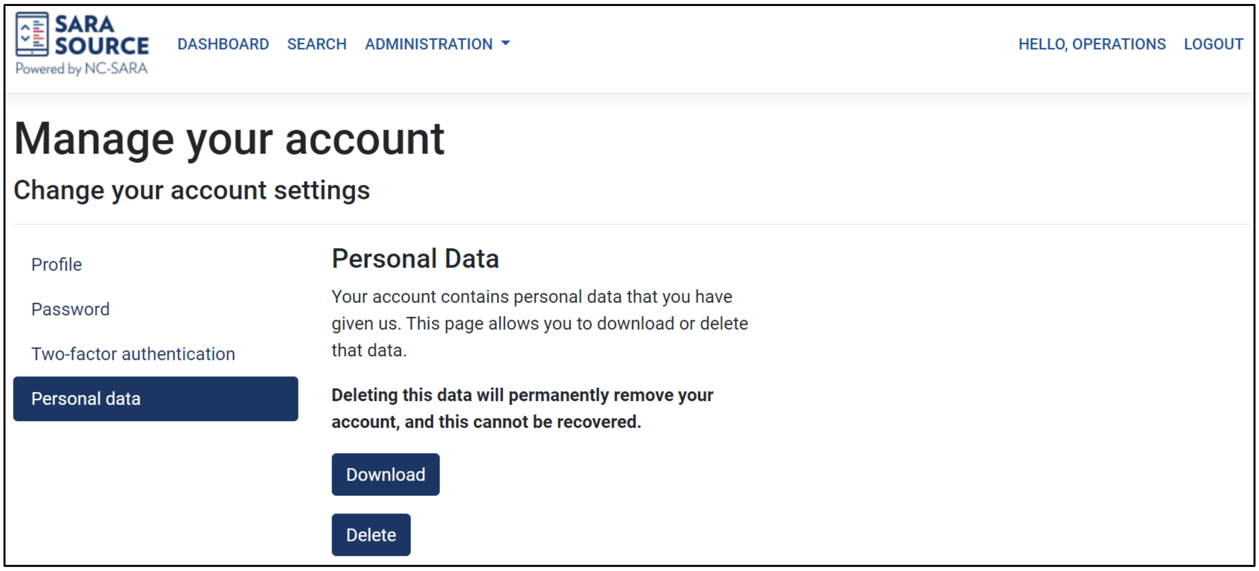
If you desire to have a two-factor authentication to access your user account, you must first add authenticator app.

Subsequent visits to this page will show you options to setup authenticator app (if you haven't done so) or reset authenticator app.



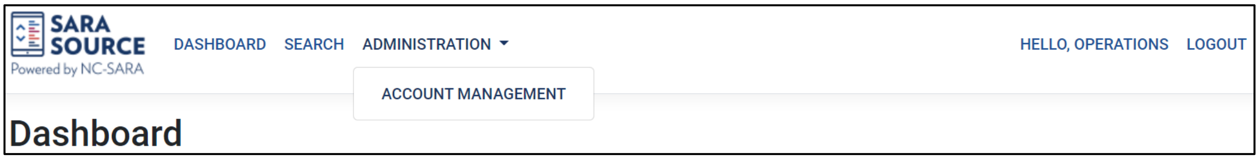
Follow the multi-step directions on the Setup authenticator app page or the reset authenticator app page.

For the Personal data page of Managing your account, you can either download or delete the personal data. NOTE: Deleting this data will permanently remove your account, with no recovery.


SARA SOURCE
Powered by NC-SARA
DASHBOARD
SEARCH
ADMINISTRATION
HELLO, OPERATIONS
LOGOUT
Manage your account
Change your account settings
Profile
Password
Two-factor authentication
Personal data
Personal Data
Your account contains personal data that you have given us. This page allows you to download or delete that data.
Deleting this data will permanently remove your account, and this cannot be recovered.
Download
Delete

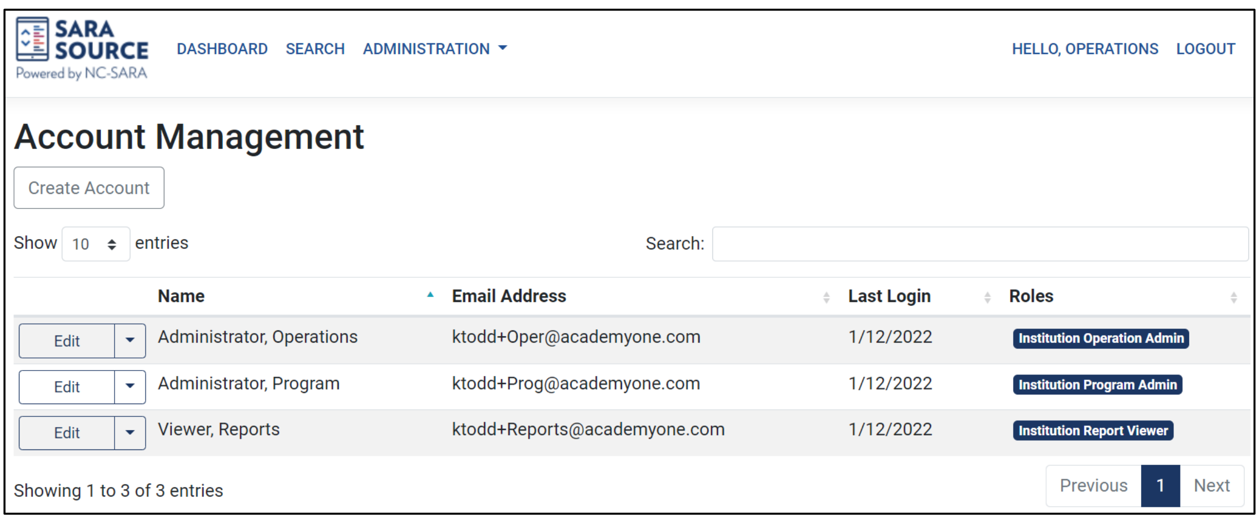
ACCOUNT MANAGEMENT

As an Institutional Operation Administrator, you are able to manage all users for your Institution. To do so, select **Account Management** by clicking on the **Administration** tab.



The **Account Management** screen lists existing account profiles for your Institution. Here, you are able to:

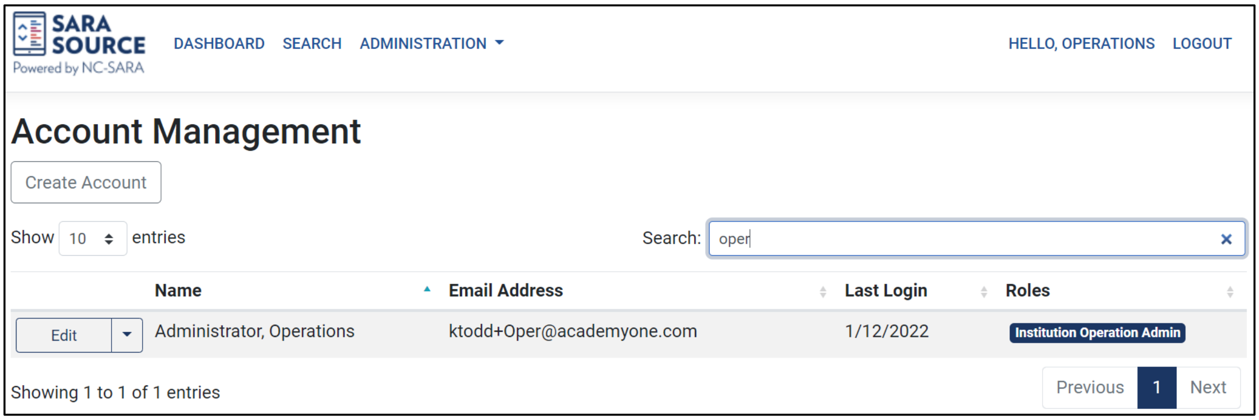
- Search for accounts and sort by column headers
- Add new accounts and assign them roles
- Edit accounts
- Deactivate and activate accounts
- Delete accounts
- Resend or revoke the email for a new account



SEARCHING FOR ACCOUNTS

You may use the **Search** box to find existing account profiles. Key letters typed in the search box will pull matches for users from all the columns displayed on this screen (Name, Email, Last Login and Roles).

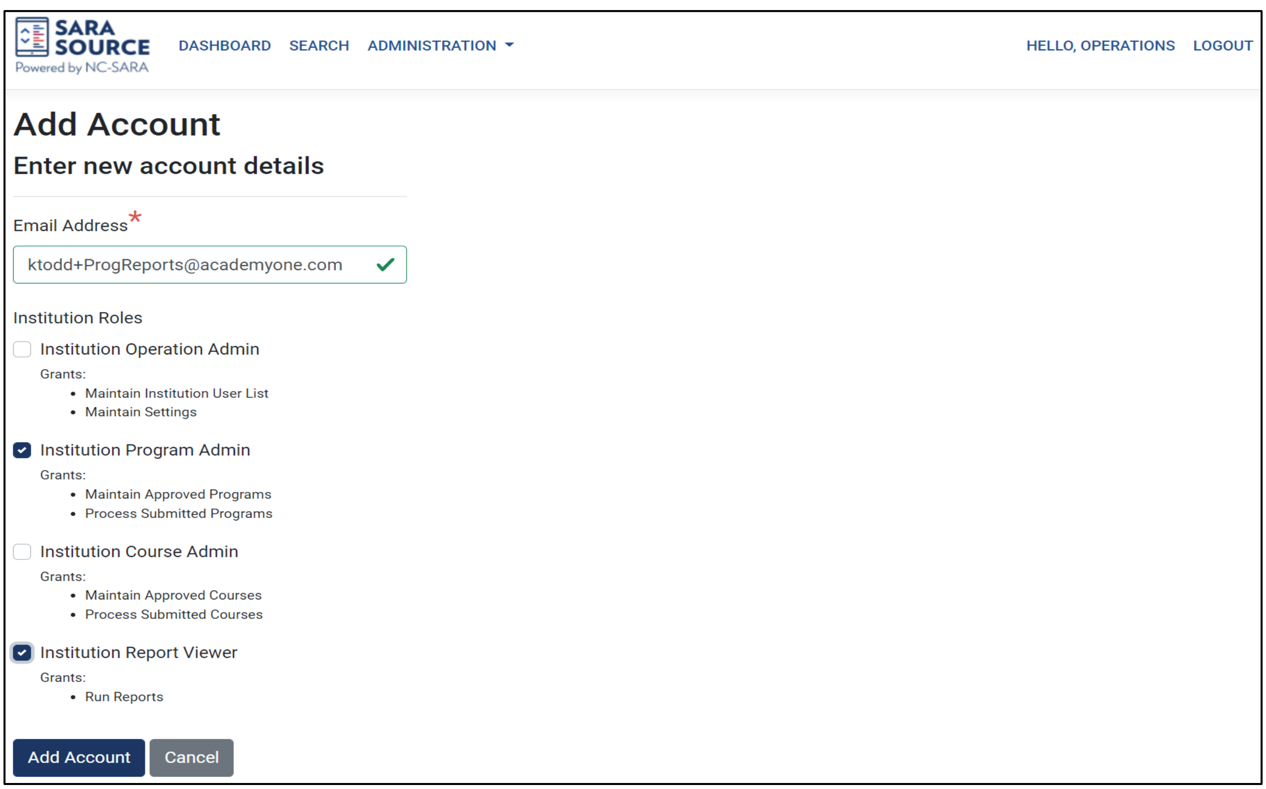
In the example below, "oper" was entered to search for an account with a name with "oper" in it or the role containing "oper" in it.



ADDING ACCOUNTS AND ASSIGNING ROLES

You may add new accounts for your Institution and assign them specific roles. To do so:

- Click the **Add Account** button on the **Account Management** screen.
- Enter the account's email address and role details. It is required that all information on this screen be provided.



Under permissions, you may assign appropriate roles to each user. More than one role can be assigned, which include the following:

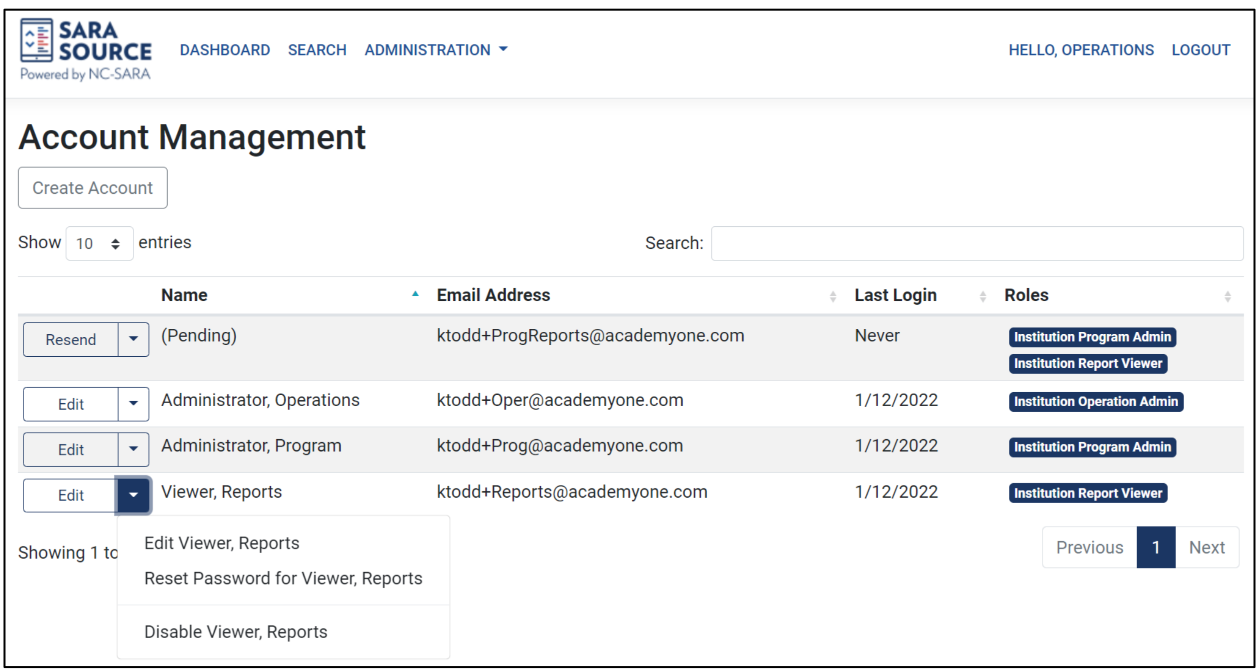
- **Institution Operation Administrator** allows the user to maintain institution user list and maintain settings.
- **Institution Program Administrator** allows the user to maintain approved programs and process submitted programs.
- **Institution Course Administrator** allows the user to maintain approved courses and process submitted courses. **[Course Administration is for a future phase.]**
- **Report Viewer** allows users to run reports specific to their Institution.

Once the user's information has been provided, click the **Add Account** button. After the user has been added, you will be returned to the **Account Management** screen. Alternately, the **Cancel** button can be clicked to cancel the add user request. This will navigate you back to the **Account Management** page without saving the user profile.

EDITING ACCOUNTS

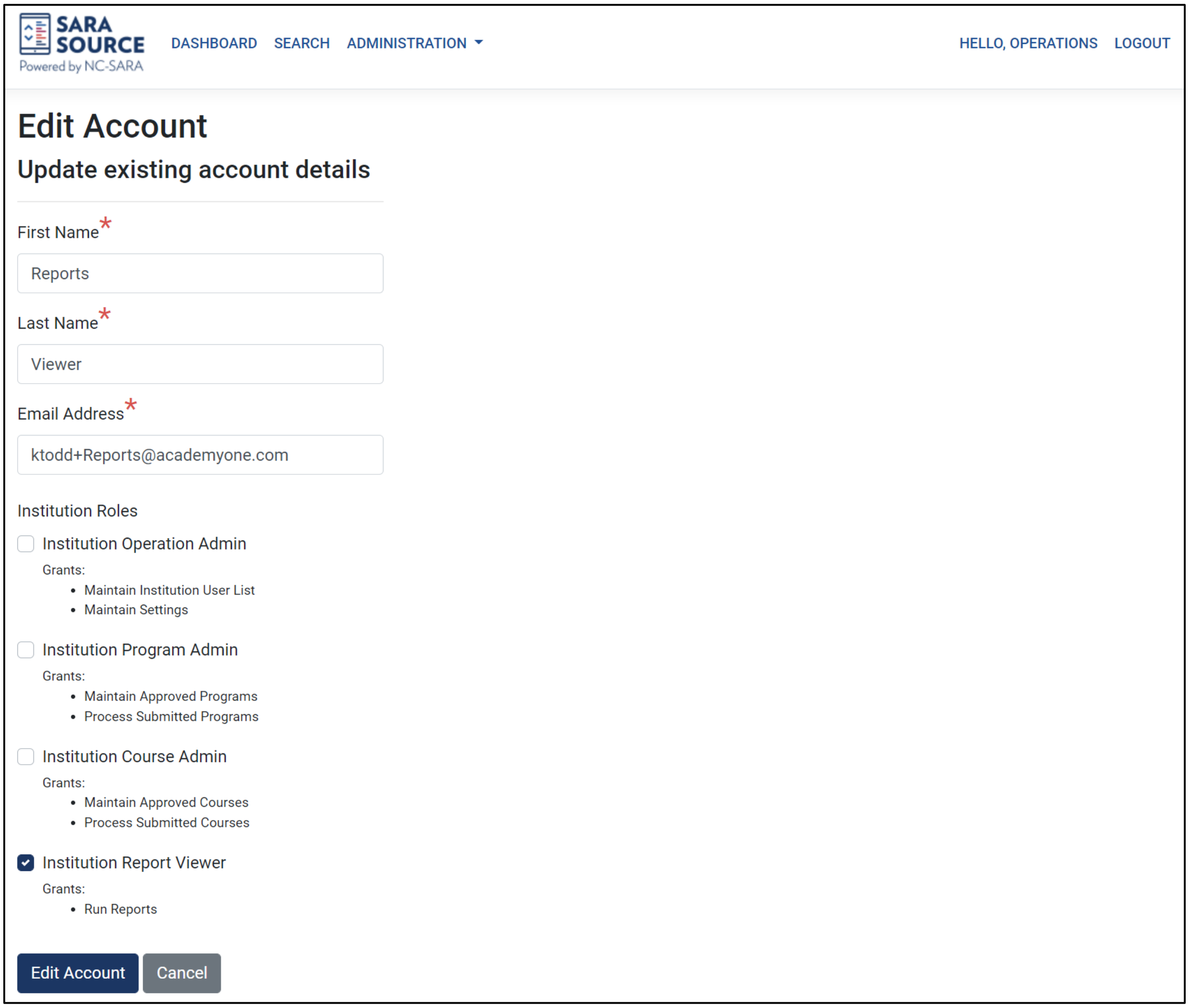
You may edit either your own or existing user profiles. To do so:

- Click **Edit** located next to the **Name**.



The **Edit Account** screen appears and is where you can update existing account details. To do this:

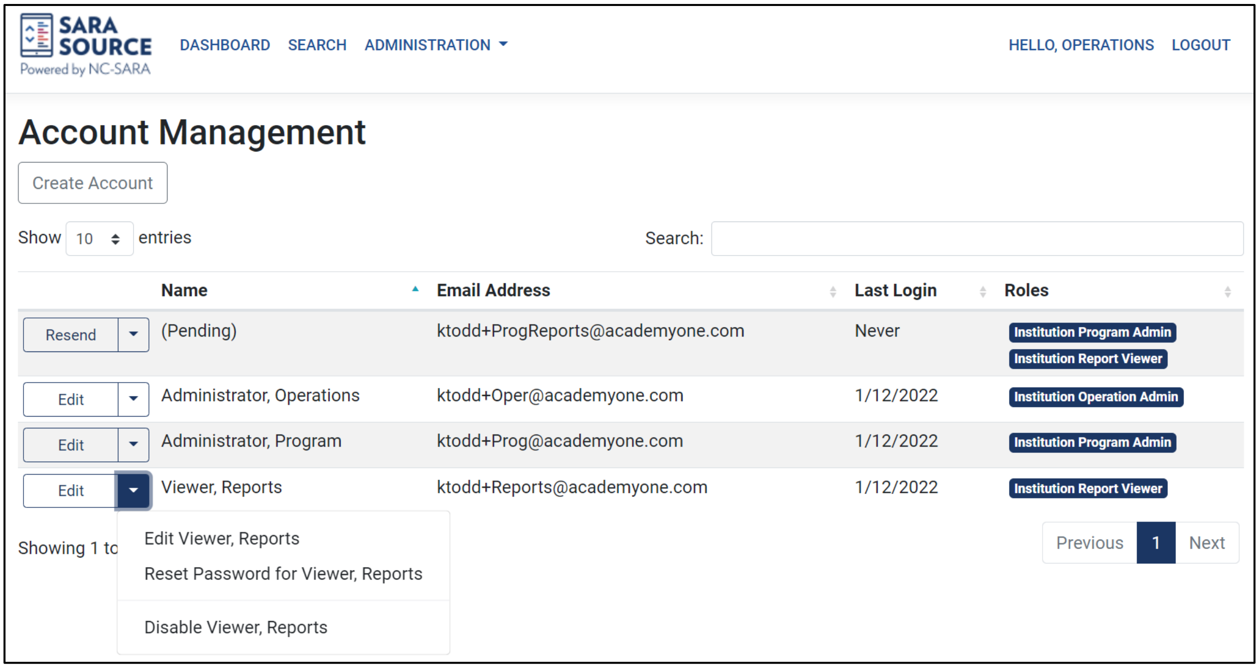
- Make your desired changes and click the **Edit Account** button to save them, or
- Click the **Cancel** button to cancel the edit account request. You will be navigated back to the **Account Management** screen page without saving the changes.



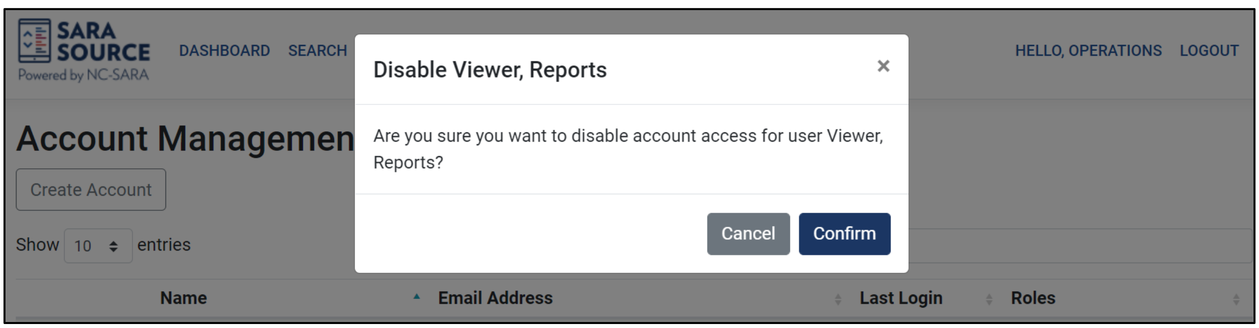
DISABLE ACCOUNTS

You are able to disable a user account. A disabled account can no longer access the system, but they can be re-activated. This will allow a user to log into the SARA Source again. This may be helpful if, for example, a user has gone on vacation for a long period of time. To do so:

- Click **Disable** under the **Edit** dropdown list located next to the **Name**.



A confirmation screen appears to confirm you want to disable the user:

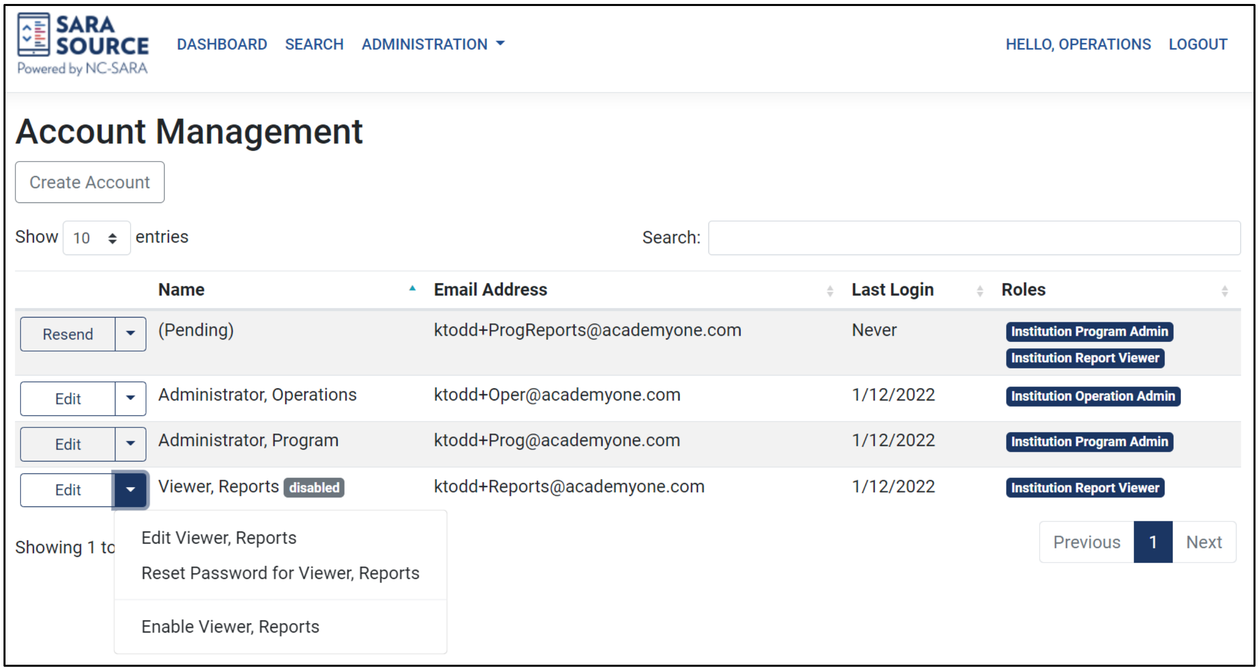


- Click the **Confirm** button to complete your transaction.
- Click the **Cancel** button to cancel the disable account request. This will navigate you back to the **Account Management** screen without disabling the user.

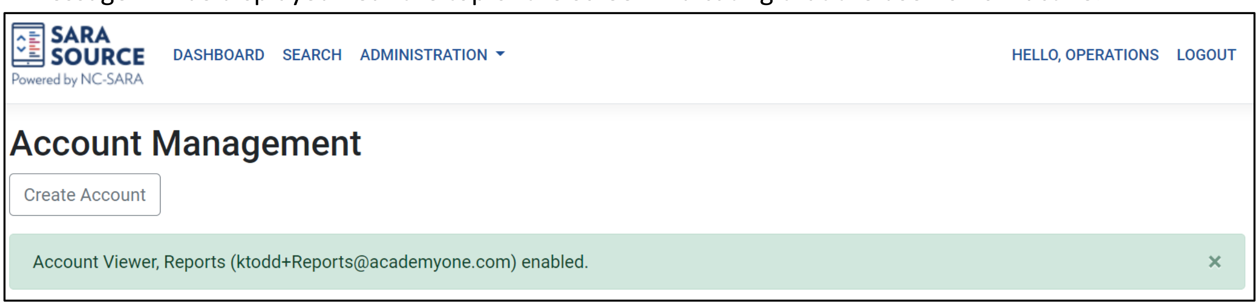
ENABLE USERS

You can activate a disabled user in the system. This will allow the user to be able to access the system again. To do so:

- Click **Enable** under the **Edit** dropdown list located next to the **Name**.

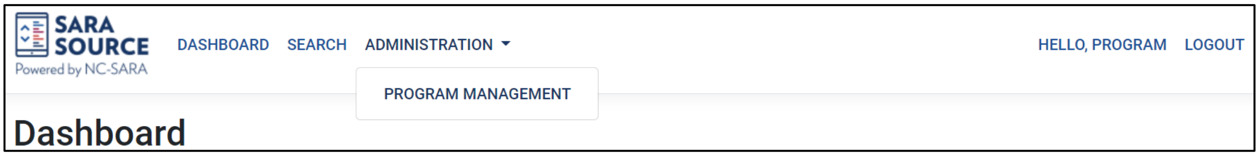


A message will be displayed near the top of the screen indicating that the user is now active.

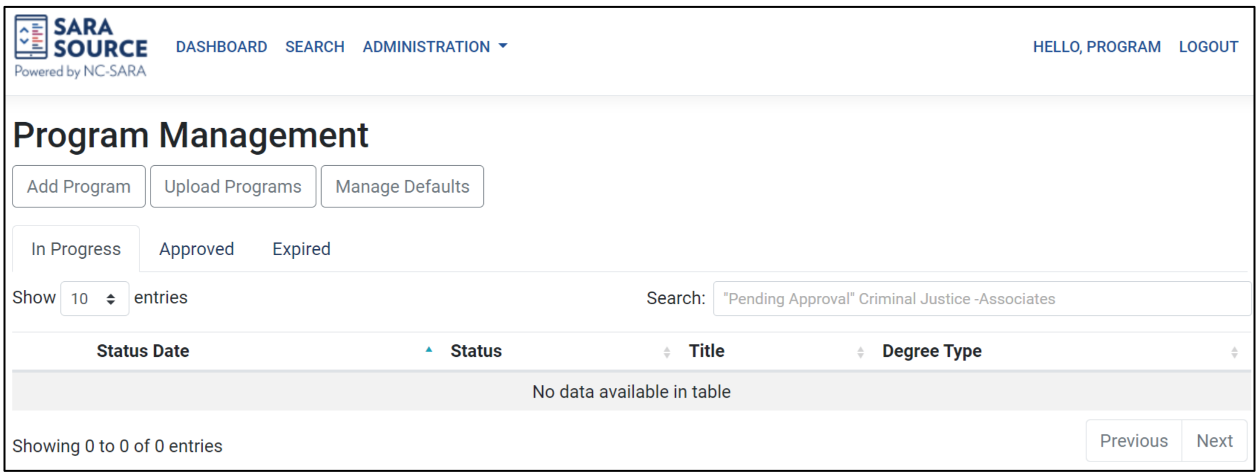


PROGRAM MANAGEMENT

From the Home page, select **Program Management** in the Administration dropdown.

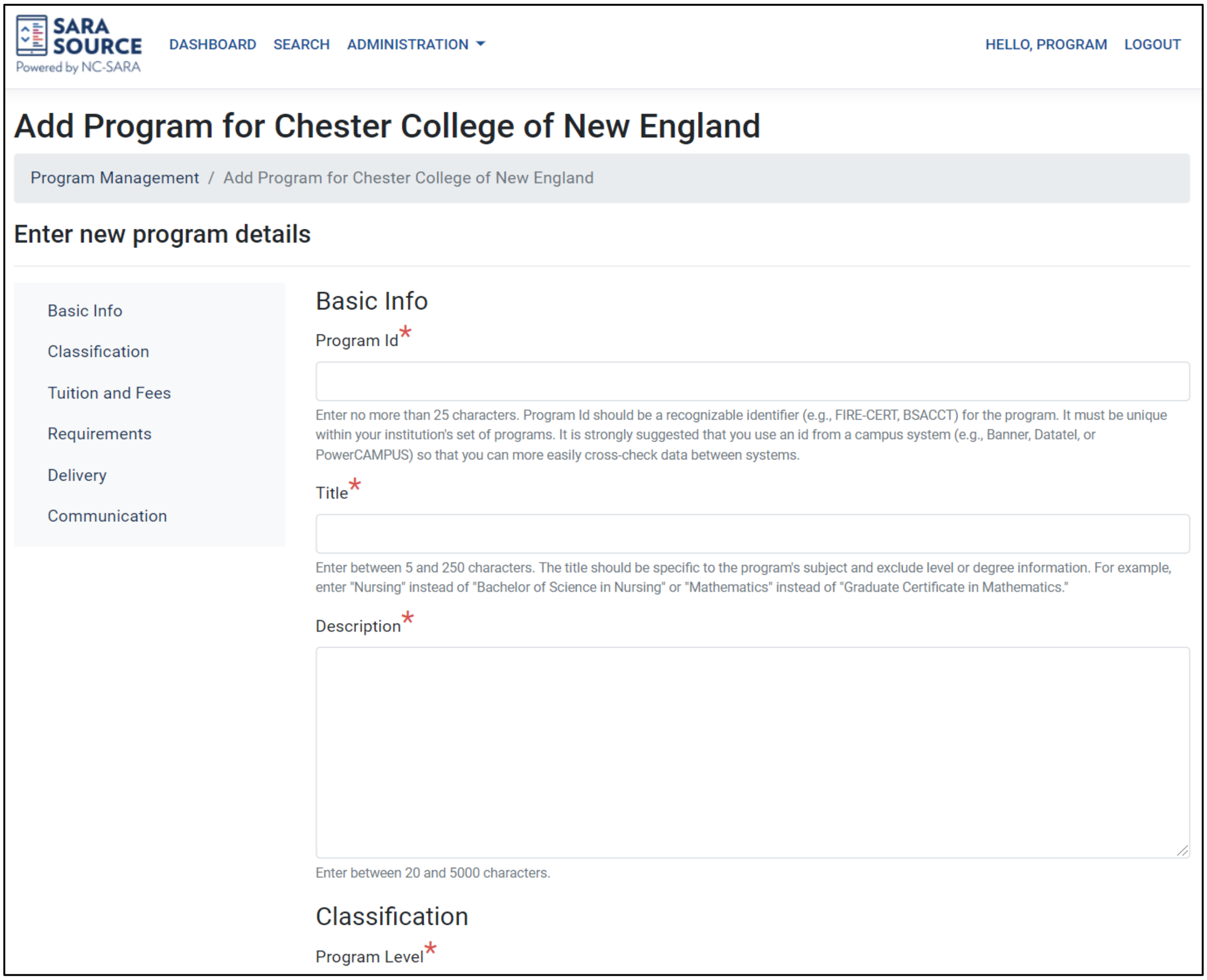


From Program Management screen, you will be able to Add and Upload Programs in addition to Manage Defaults. Two tabs are shown for In Progress programs and Approved programs.

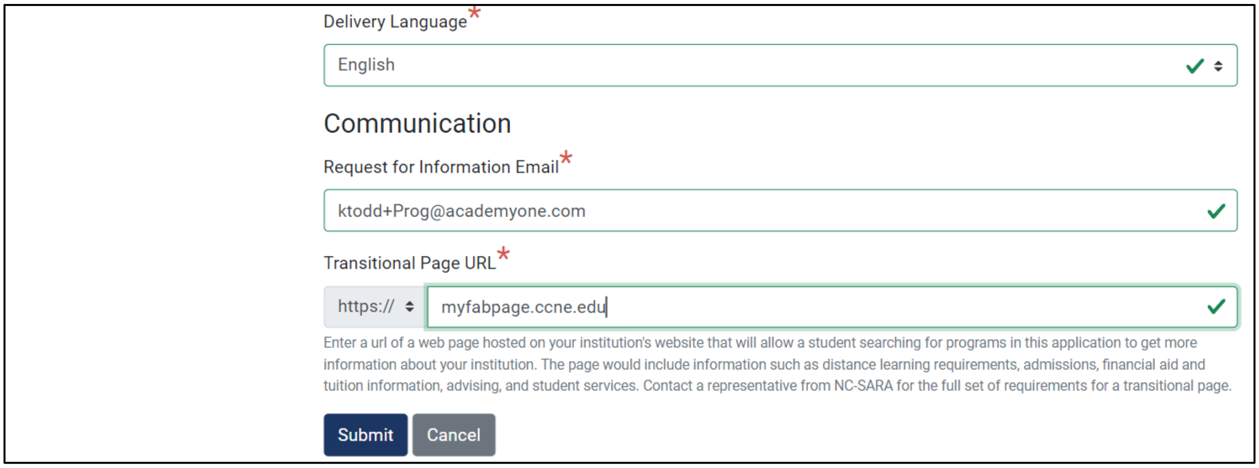


ADD PROGRAM MANUALLY

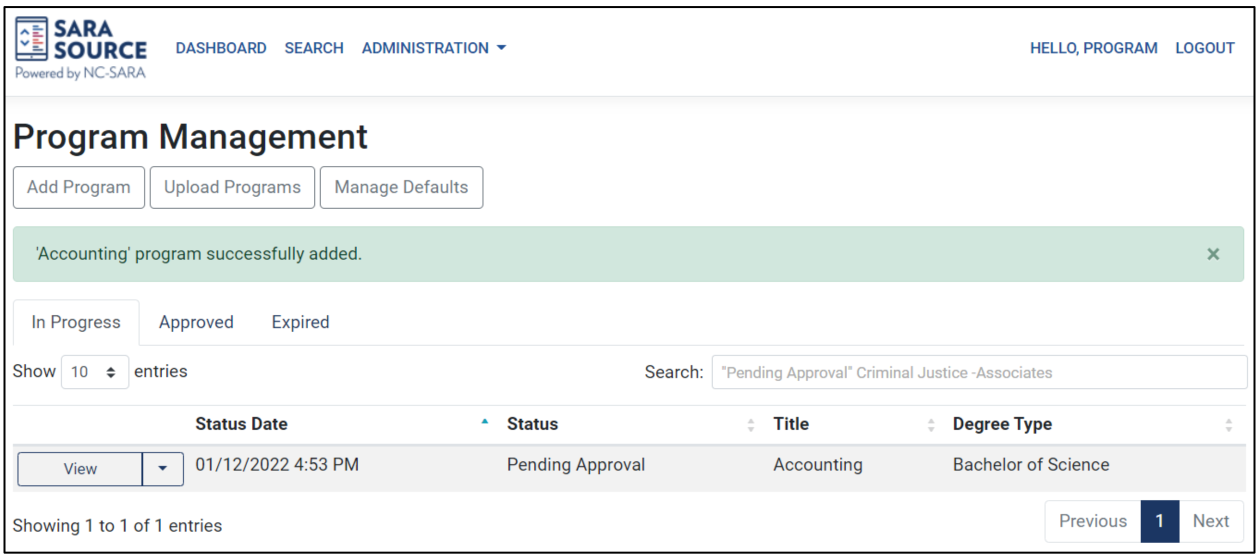
To add a program manually, choose Add Program button. Multiple sections are filled out for each program: Basic Information, Classification, Tuition and Fees, Requirements, Delivery, and Communication. Informational guidance is provided under each field. All required fields are marked with an asterisk (*).



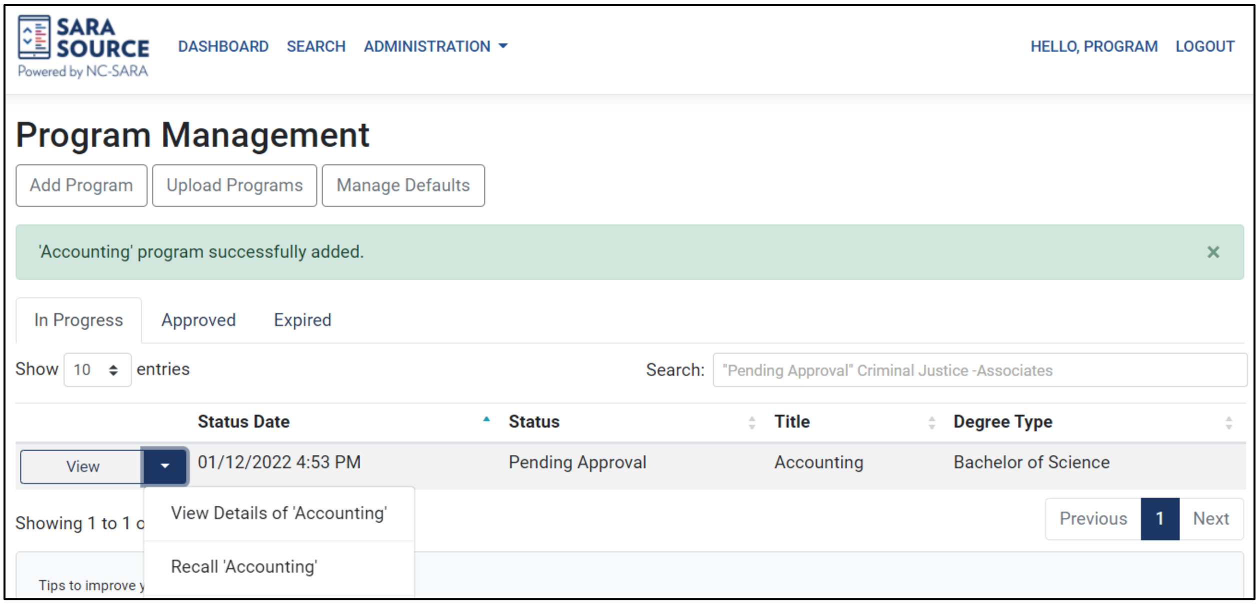
Once all required fields and any additional fields are completed, choose the **Submit** button. If you do not want to submit this program, choose the **Cancel** button and you will be returned to **Program Management** page. It is important not to abbreviate words in the Title or Description fields as it will affect searching results.

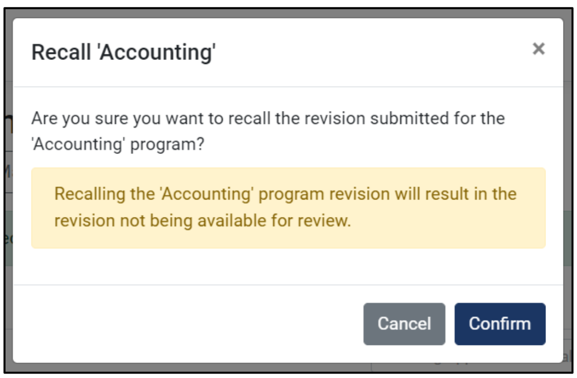


After submitting a program, a message will be displayed near the top of the screen indicating that the program was successfully added, and the program will appear within the "In Progress" tab until its status changes.

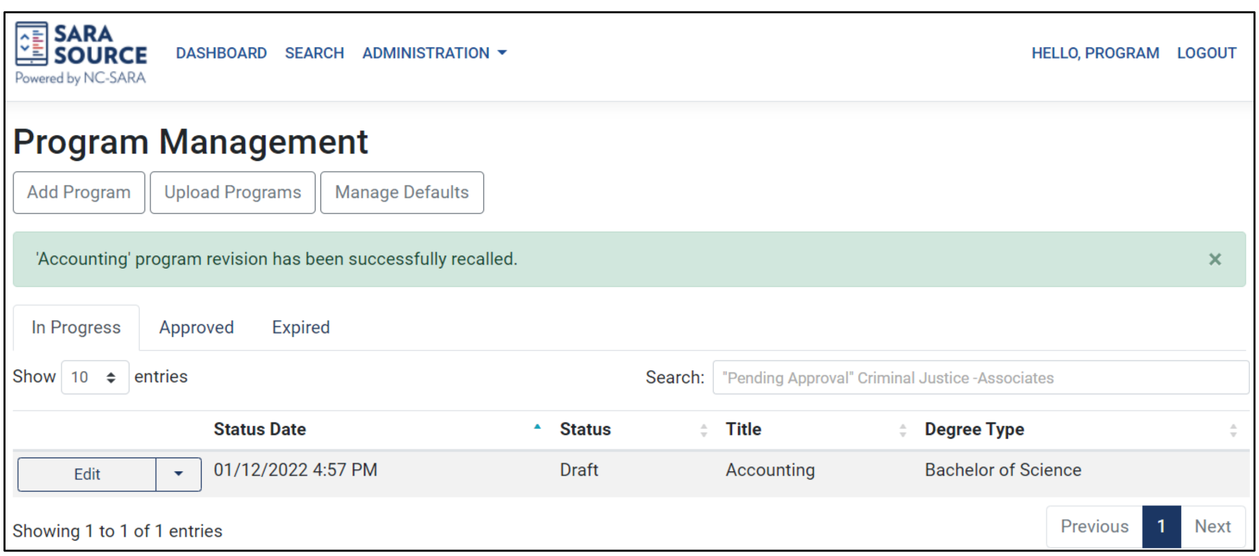


In Progress programs may be Viewed or Recalled. Choose **View** to see details of the program. Choose **Recall** to edit details before submitting again. When you **Recall** a program, you prevent NC-SARA from processing the program.



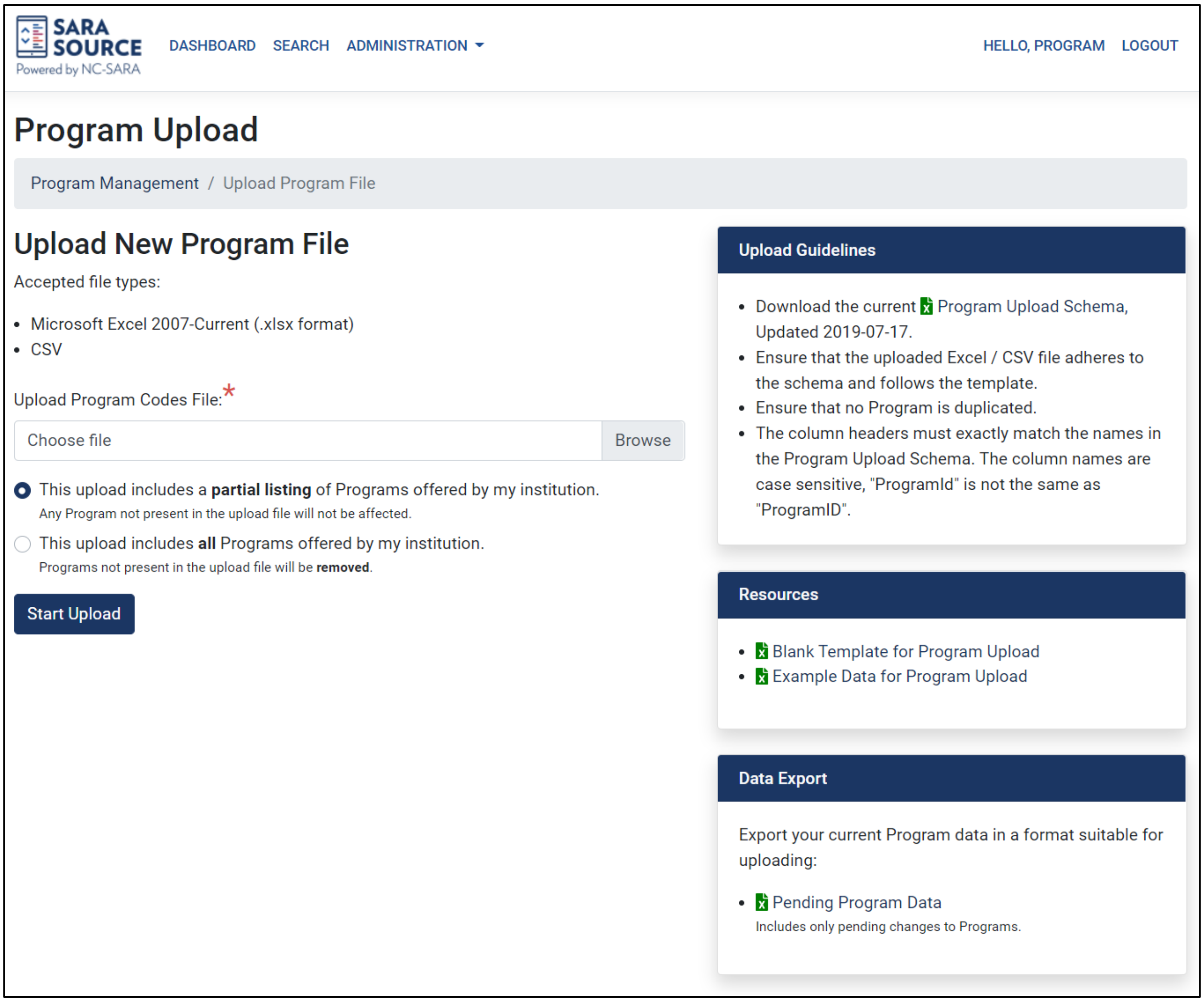


A Recalled program is assigned **Draft** Status and available to be edited and viewed.



UPLOAD PROGRAMS

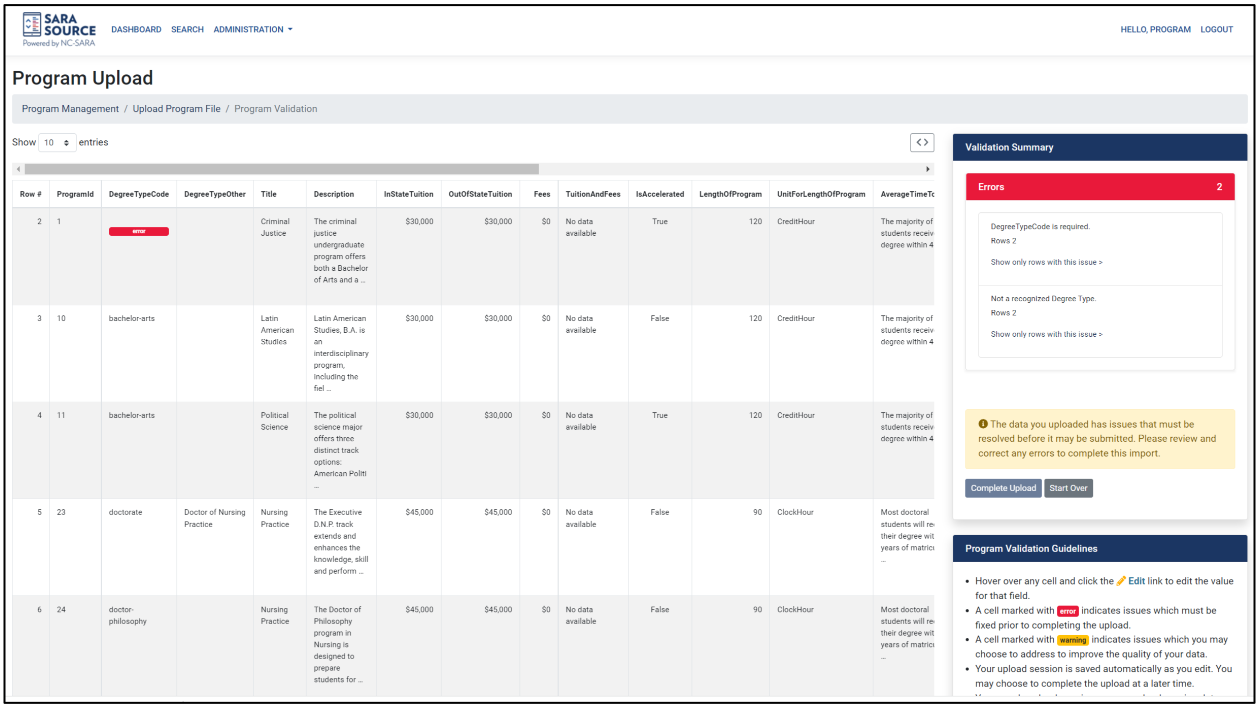
To submit program information in bulk, you may use the **Program Upload** option in **Program Management. Upload Guidelines**, including the required Program Upload schema, is found on the right side of the page. In addition, **Resources** are also provided. You also have the ability to export (Data Export) your institution's program data in SARA SOURCE which will show you the format that is suitable for uploading.

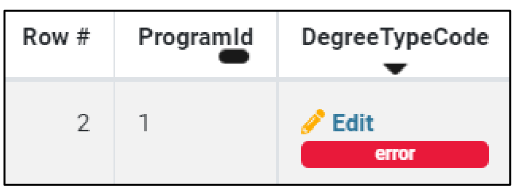


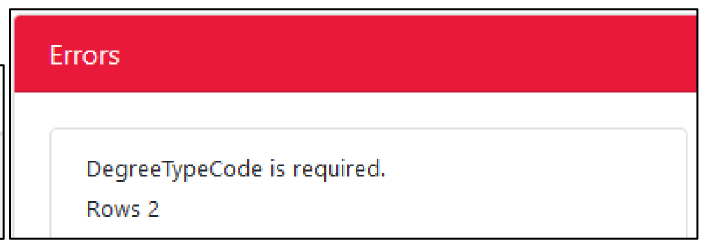
Upload File Requirements: The data upload files are required to be in Excel or CSV format.

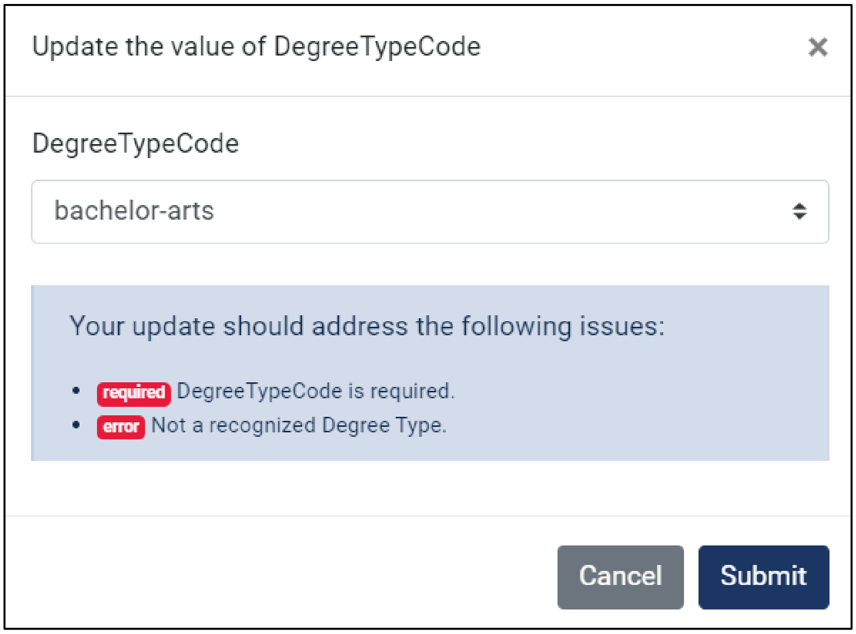
Partial Listing Upload versus All Upload: To only add new? programs, choose **Partial** Listing Upload. To replace all Program data, choose **All,** with the understanding that any programs NOT included in the file will be **removed.**

File Validation: Upload files are subject to validation and any errors must be corrected before the upload is successful. Once errors are identified, you will have the ability to correct the file on screen without having to re-upload. Alternatively, you may alter the file outside of the application and then upload it again. Examples of error messages are below.

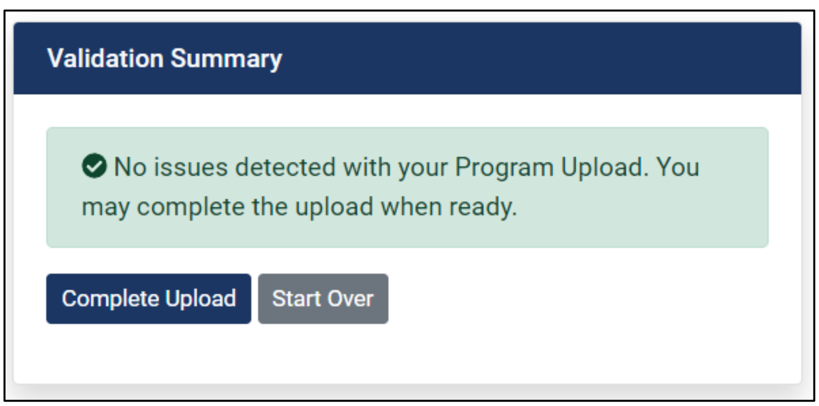




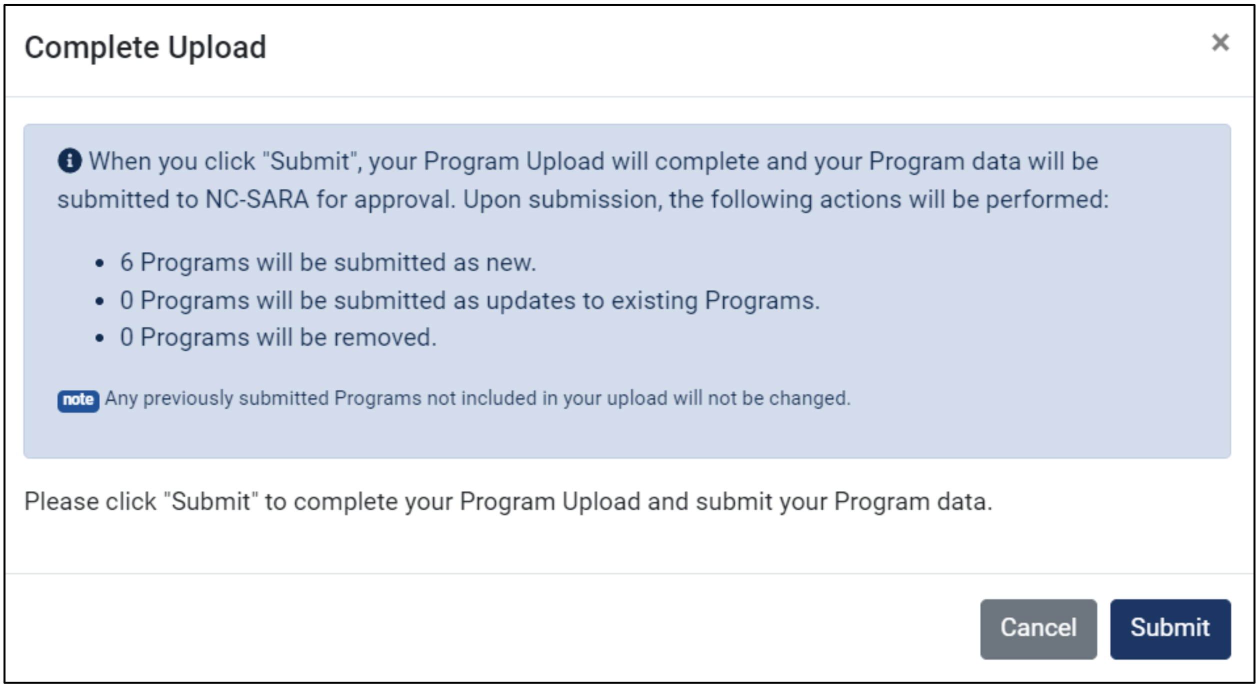




After making all corrections, you may **Complete Upload** or **Start Over**.



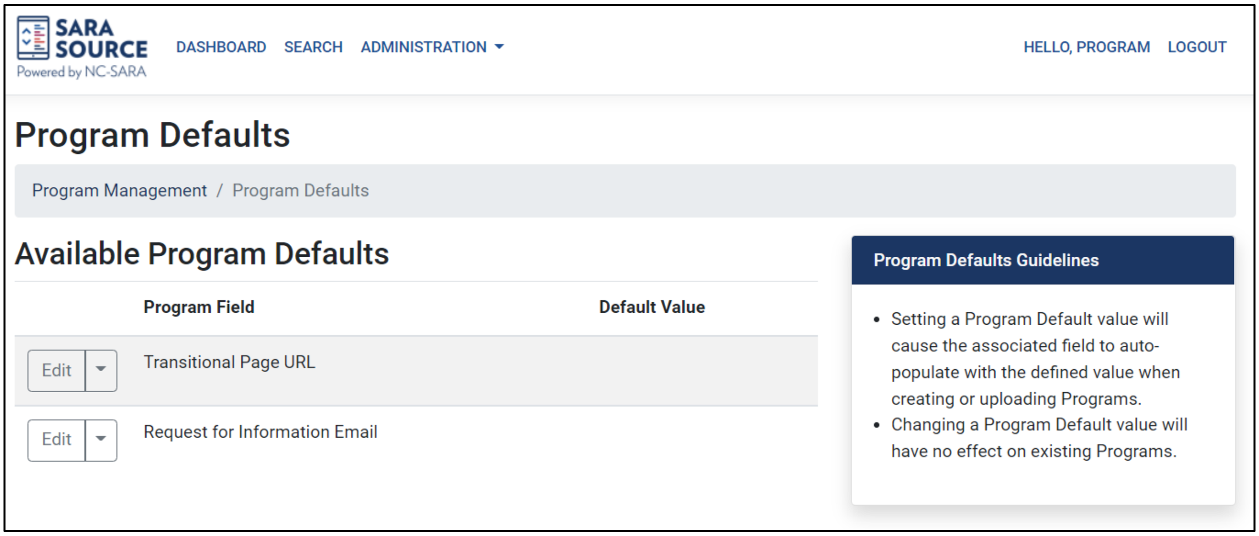
If you choose **Complete Upload**, a confirmation with a summary and **Submit** option is presented. If you choose **Cancel**, no upload will take place.



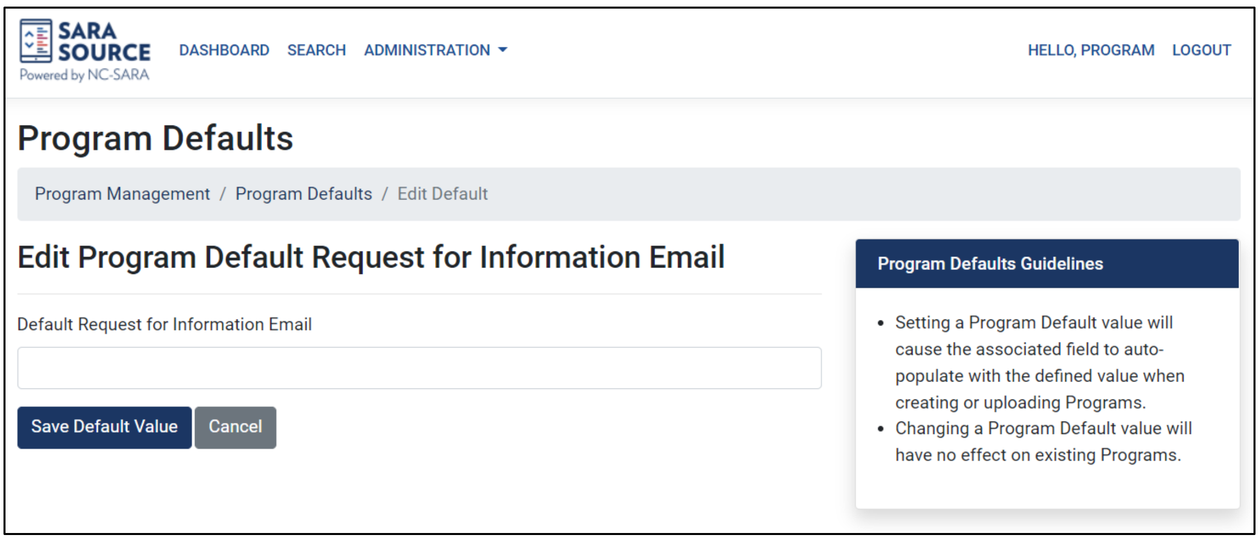
The above message is an example of a “partial” upload.

MANAGE PROGRAM DEFAULTS

You may set default values for the Transitional Page URL and/or the Request for information email. Setting a **Program Default** will cause the associated field to auto-populate with the defined value when creating or uploading Programs. Changing a Program Default will have no effect on existing Programs.



You may Edit or Clear default values.



REPORTS

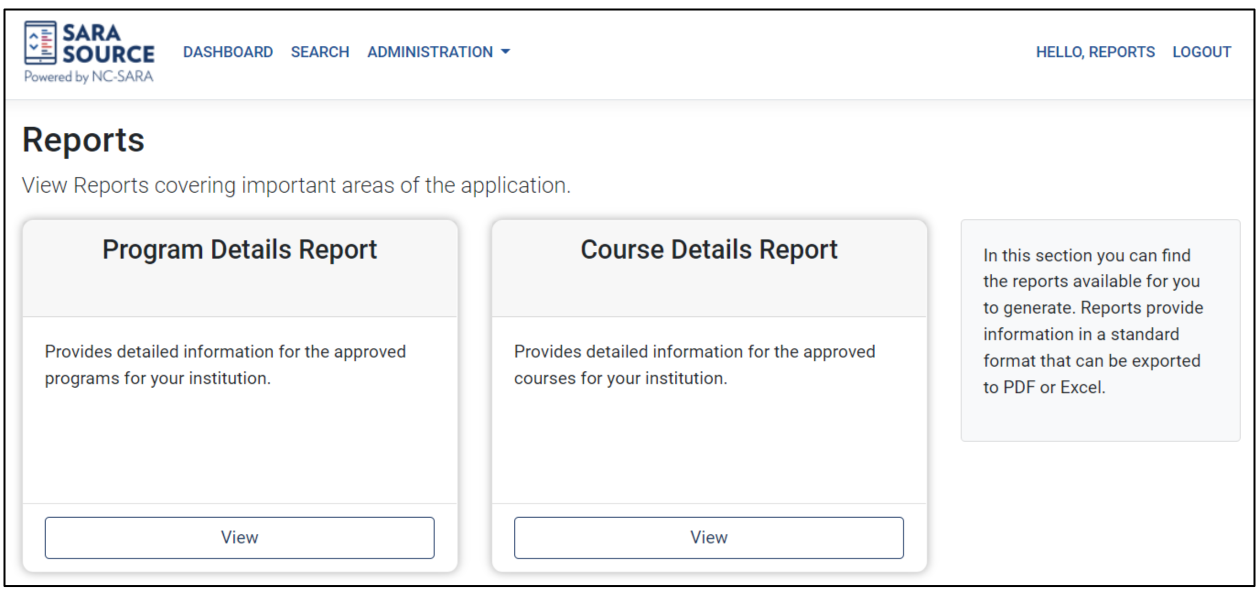
As an Institutional Administrator (or Report Viewer), you will have the ability to access and view reports. On the home page, select **Reports** under the **Administration** tab.

REPORT DESCRIPTIONS

Here you will see a list of reports available to you. To access a report, click **View** under the desired report.

The following reports are currently available to institutions and only contain data relevant to them:

- **Program Details Report** – Provides summary statistics for the programs in the application based on different aspects.
- ***Course Details Reports*** *– Provides summary statistics for the courses in the application based on different aspects.* (Not available at this time)



INSTITUTIONAL PROGRAM ADMINISTATOR

Users with this role will have access to program uploads, the landing screen and the help pages that the Institutional Administrator can access. Please refer to the LOGGING INTO THE SYSTEM AND VIEWING YOUR DASHBOARD, MANAGING YOUR ACCOUNT, and pages 15 through 22 in this guide.

INSTITUTIONAL REPORT VIEWER

Users with this role will have access to view reports and to the landing screen. Please refer to the REPORTS section of this user guide.