# Oracle Identity Manager

## Process Guide:

## OIM Process Guide for Requesting Access

# Contents

# Requesting Access in OIM

## For Support with OIM

For questions or support related to OIM functionality contact the UIS Service Desk or Access Management.

## Application Access Requested Through OIM

This document details the process of using Oracle Identity Manager (OIM) to request entitlements that provide access to the following systems:

- Human Resource Management System (HRMS)
- Finance System (FIN)
- CU Marketplace – (ePro* entitlements in FIN)

## POI Access

For POIs only POI type 15 can request access to CU applications and IT resources.

## Training Requirements

OIM will perform checks for training to ensure required training has been completed for each requested entitlement. The request(s) will fail if training requirements have not been fulfilled and will not be assigned to the manager. Training is checked against SkillSoft directly and against the HRMS database for In-Person courses.

You will need to complete the required training for each application role you request BEFORE you make your request. If you do not complete the required training the request will fail and you will need to start your request again after completing the required training.

**NOTE:** Training will need to show as completed in SkillSoft and/or HRMS in order for you to receive access to University Systems. Any training not recorded in these systems will not be sufficient for access to be granted.

## Making a Request

1. If you are requesting entitlements for yourself, click on **Make Request**. Note: If you are requesting entitlements for someone else see How to Request Access for Others in Oracle Identity Manager (OIM) or How to Request Access for Multiple Users in Oracle Identity Manager (OIM).
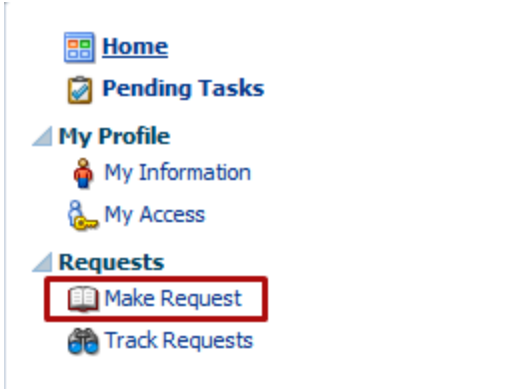
2.  In the catalog, search for all entitlements or enter a role name and search.



3.  Update the **Sort By** option to Display name to list entitlements in alphabetical order.



4.  Look at the entitlement prefix to find the application environment you are requesting access for. Examples: FIN DEV for FIN Development Environment, FIN PROD for FIN Production access, HRMS PROD for HRMS Production.
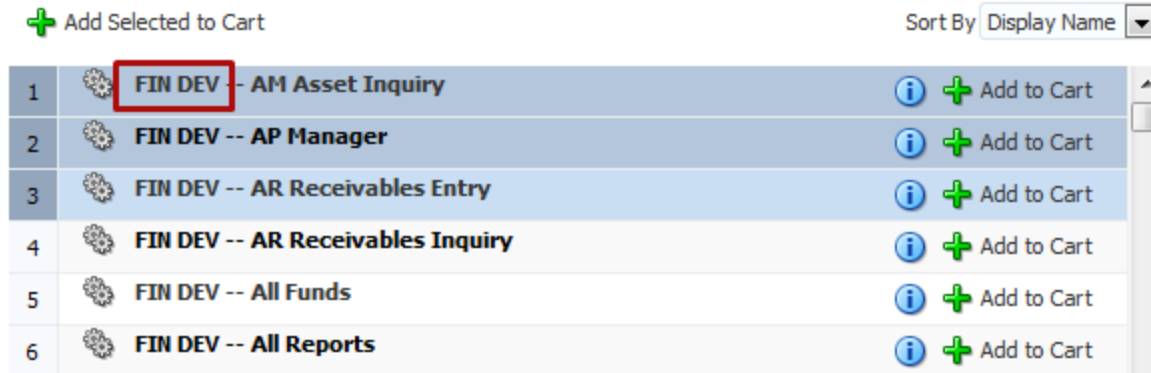
5.  Add individual entitlement to your shopping cart by clicking on the **Add to Cart** button to the right, OR select all the roles you need and use the **Add Selected to Cart** in the upper left to add multiple entitlements at once. If you encounter a >> symbol where the **Add to Cart** button should be, just click on it to reveal the **Add to Cart** button.



6.  You may add entitlements for multiple applications environments. When you are done click on **Checkout**.



7.  On the Checkout page you can enter information for approvers in the **Justification** field.

⊿ **Justification and Effective Date**

Justification [                                                    ]

Effective Date [                    ]

8. For multiple Jobs or Job and POI status:
   a. If you have multiple Jobs or a Job AND a POI status your request by default will be associated with your primary Job. To change which job the access is associated with click on **Select Non-Default Job for Request** for EACH entitlement.

| 2 | FIN DEV -- AR Receivables Entry | Select Non-Default Job For Request | Target Account: In Cart | ✖ Remove | ⓘ Details | ✔ Ready to submit |
| 3 | FIN DEV -- AM Asset Inquiry | Select Non-Default Job For Request | Target Account: In Cart | ✖ Remove | ⓘ Details | ✔ Ready to submit |

   b. Remove any entitlements from you request by clicking **Remove**.
9. When you are satisfied with the items in your cart, **Submit** your request or save it as a draft to return to it later.

[ Submit ] [ Save as Draft ]

10. Once you have submitted your request, you will arrive to a **Request Summary** page. Your request has successfully submitted!
11. On the Request Summary page wait a few seconds and then refresh the page to check the status.

⊿ **Summary Information**                                              🔄 Refresh   ✖ Withdraw Request

| Request Id | 318 | | Requester | DARSWeb Z9VSRSYS02 |
| Requested Date | 4/24/2015 | | Status | Obtaining Request Approval |
| Effective Date | | | Parent Request ID | |
| Justification | | | Request Type | Heterogeneous Request |

   a. If the status shows **Request Failed**, you may not have completed the training course required for your access. Click on the words **Request Failed** and the popup will tell you the reason.
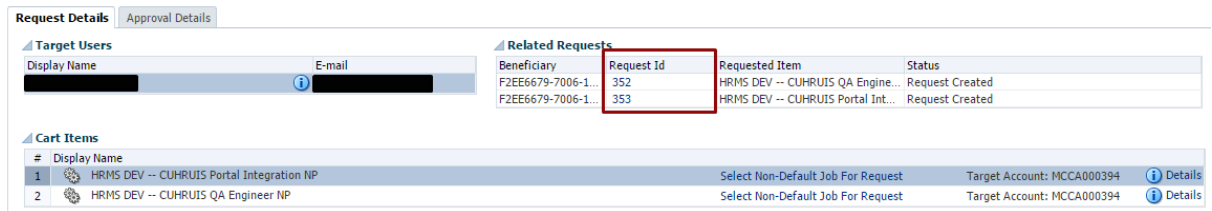
⊿ **Summary Information**

| Request Id | 330 | | Requester | ▮▮▮▮▮▮ |
| Requested Date | 4/24/2015 | | Status | Request Failed |
| Effective Date | | | Parent Request ID | 314 |
| Justification | | | Request Type | Provision Entitlement |

**Request Error Details**                                                                                                              ✕

IAM-2050126 : Invalid outcome Required training not complete. Request requires completion of: A00029,A00030,F00001 received from SOA for the request id 330.
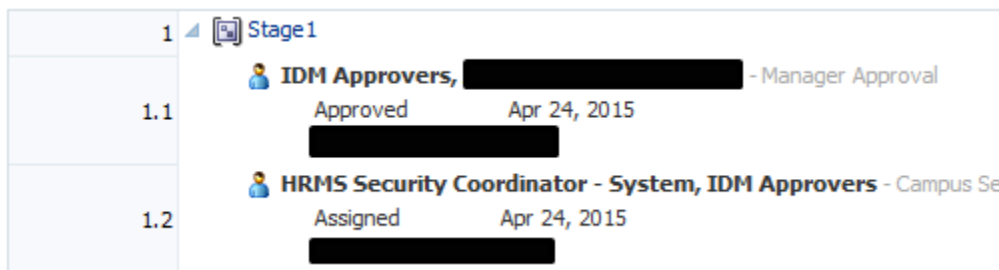
b.  If you requested multiple Entitlements, the main request is a parent request and each entitlement is a child request. You can see the status of all the individual requests in the Request Details tab in the Related Requests box. Click on the Request ID of the child request to see its status.

| Request Details | Approval Details | | |
| --- | --- | --- | --- |

**Target Users**

| Display Name | E-mail |
| --- | --- |
| ⬛ | ⬛ |

**Related Requests**

| Beneficiary | Request Id | Requested Item | Status |
| --- | --- | --- | --- |
| F2EE6679-7006-1... | 352 | HRMS DEV -- CUHRUIS QA Engine... | Request Created |
| F2EE6679-7006-1... | 353 | HRMS DEV -- CUHRUIS Portal Int... | Request Created |

**Cart Items**

| # | Display Name | | | |
| --- | --- | --- | --- | --- |
| 1 | HRMS DEV -- CUHRUIS Portal Integration NP | Select Non-Default Job For Request | Target Account: MCCA000394 | ⓘ Details |
| 2 | HRMS DEV -- CUHRUIS QA Engineer NP | Select Non-Default Job For Request | Target Account: MCCA000394 | ⓘ Details |

c.  To check who the request was assigned to click on the **Approval Details** tab. Under Assignees you will see IDM Approvers and the manager your request went to for approval (redacted in the screen shot below). Double click on the request title for more details.

| Request Details | **Approval Details** | | |
| --- | --- | --- | --- |

View ▾   🔄 Refresh   📄 Detach

| Row | Title | Task Status | Assignees |
| --- | --- | --- | --- |
| 1 | Request for Individual: ⬛ for 41~CUHRUIS_QA_Engineer_NP | Assigned | IDM Approvers,⬛ |

Columns Hidden   1
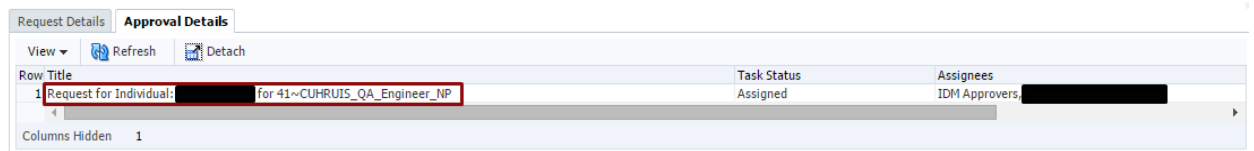
d.  Below you will then see the workflow approval. Most entitlements will be routed to your manager and then to a security coordinator for the system and your campus.

|   | 1 | ▲ 🔲 Stage 1 | |
| --- | --- | --- | --- |
|   |   | 👤 **IDM Approvers,** ⬛ - Manager Approval | |
|   | 1.1 | Approved | Apr 24, 2015 |
|   |   | ⬛ | |
|   |   | 👤 **HRMS Security Coordinator - System, IDM Approvers** - Campus Se | |
|   | 1.2 | Assigned | Apr 24, 2015 |
|   |   | ⬛ | |

e.  In the lower image you will see a green check if the approver has approved the request.
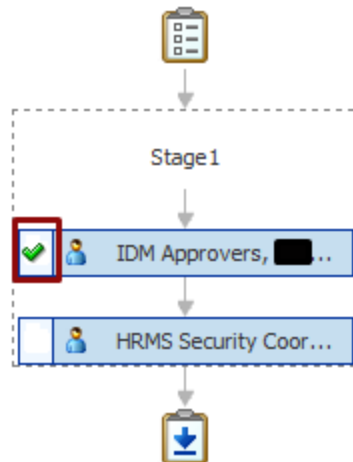
12. You will receive an email when you request has been completed or if it is denied by an approver. Check back in on the status of your request whenever you like following the **Track a Request** instructions.

13. If you receive an email indicating that one of your entitlements will result in incompatible access, follow the instructions in the email or in the **Incompatible Access** directions.

14. Also see the related instructions:
    a. **Requesting Department Security (HRMS Only)**.
    b. **Requesting Approval Employee Groups (HRMS Only)**.

## Request to Remove Access

You may initiate a request to remove any of your access. To do so follow these instructions:

1.  Log into OIM.

2.  Click on **My Profile > My Access.**

3.  Click on the **Application Roles** tab.

4.  Select the application roles you want removed and click on **Remove Entitlements**:



5.  On the checkout page review your request and add a justification if needed:



6.  Submit your request:



7.  Your request will be routed to an administrator for approval after which the access will be removed.

## Requesting Department Security (HRMS Only)

1. When do you need to request Department Security Access?
    a. When you are making your initial HRMS access request.
    b. When you need to change you department security.
2. **NOTE:** If you do not specifically request department level access, you will automatically be granted access to your own department of employment.
3. You will need to specify what level of department access you require by requesting one of the following HRMS entitlements. In the Make Request page search for and request an entitlement beginning with "**Dept Access**":
    a. Dept Access – My Dept Only
    b. Dept Access – All Anschutz
    c. Dept Access – All Boulder
    d. Dept Access – All Denver
    e. Dept Access – All Springs
    f. Dept Access – All System
    g. Dept Access – Custom
        i. For the *Dept Access – Custom* entitlement **only**, you will need to list what departments you need access to. If you do not provide this in the **justification** field of the request, then you may be asked to provide this information using the Request Additional Information process.
    h. Dept Access – All Campuses
        i. The All Campus department security requires an additional approval from the System Campus HRMS Security Coordinator. OIM will route the request to that security coordinator after the approval of the primary campus security coordinator.
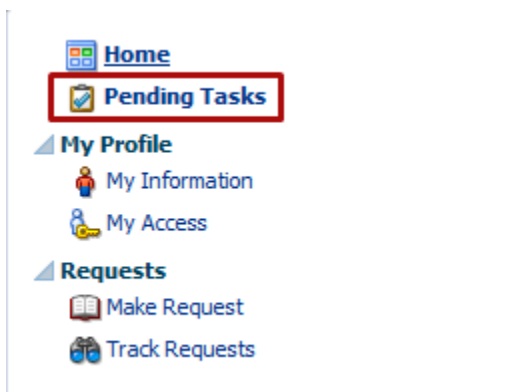
## Requesting Approval Employee Groups (HRMS Only)

1. When you request one of the following HRMS approval roles you will also need to request one or more **Employee Groups** for approval workflows:
   - Job Data – Approval
   - Position Data – Approval
   - Funding Distributn - Approval
2. You will request the required **Approval Employee Groups** by looking up and requesting one of these entitlements:
   - For **Job Data – Approval**
        i. Job Data - ApprAllCU
       ii. Job Data - ApprClassStaff
      iii. Job Data - ApprFellowships
       iv. Job Data - ApprMedicalRes
        v. Job Data - ApprOffExpProf
       vi. Job Data - ApprOtherFaculty
      vii. Job Data - ApprRegularFaculty
     viii. Job Data - ApprResearchFaculty
       ix. Job Data - ApprRetirees
        x. Job Data - ApprStudentFaculty
       xi. Job Data – ApprStudentWorker
   - For **Position Data – Approval**
        i. Position Data - ApprAllCU
       ii. Position Data - ApprClassStaff
      iii. Position Data - ApprFellowship
       iv. Position Data - ApprMedicalRes
        v. Position Data - ApprOffExpProf
       vi. Position Data - ApprOtherFac
      vii. Position Data - ApprRegularFac
     viii. Position Data - ApprResFac
       ix. Position Data - ApprRetirees
        x. Position Data - ApprStdntFac
       xi. Position Data – ApprStdntWrkr
   - For **Funding Distributn - Approval**
        i. Funding Dist - ApprAllCU
       ii. Funding Dist - ApprClassStaff
      iii. Funding Dist - ApprFellowships
       iv. Funding Dist - ApprMedicalRes
        v. Funding Dist - ApprOffExpProf
       vi. Funding Dist - ApprOtherFacult
      vii. Funding Dist - ApprRegularFac
     viii. Funding Dist - ApprResearchFac
       ix. Funding Dist - ApprRetirees
        x. Funding Dist - ApprStudentFac

## Requesting Incompatible Access

If you request roles that constitute Incompatible Access, you will have to identify a Reviewer who will approve your Incompatible Access. They will need to sign the Compensating Controls form for the system you are requesting the IA access and you will need to attach the form to your OIM request before it will go to your manager for approval.

1. Log into OIM and request the access for HRMS or FIN.

2. If the request includes application roles that will result in Incompatible Access, the request will NOT be assigned to your manager/sponsor for approval, but will be assigned to you for action.

3. You will receive an email from the system with instructions.

    a. The email will include a link to the Compensating Controls Forms.

        i. HRMS Compensating Controls
        ii. FIN Compensating Controls

    b. Fill out the user portion of the form, provide the Reviewer information, and sign the form.

    c. Send the form to the Reviewer.

        i. The Reviewer will have to sign the form and return it to you.

4. Log into OIM
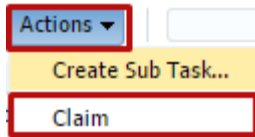
5. Open your pending request in the Pending Tasks page.



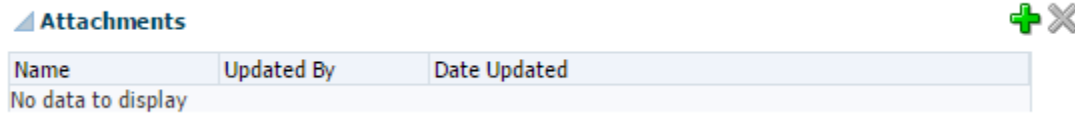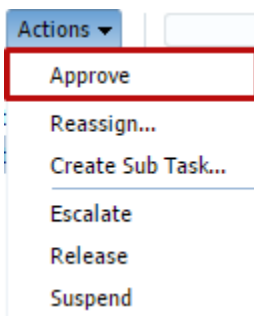6. Open the request by clicking on the Request Title.



7. Claim the request

8.  On the Approval Details Tab, use the Add Attachments section in the lower right corner.
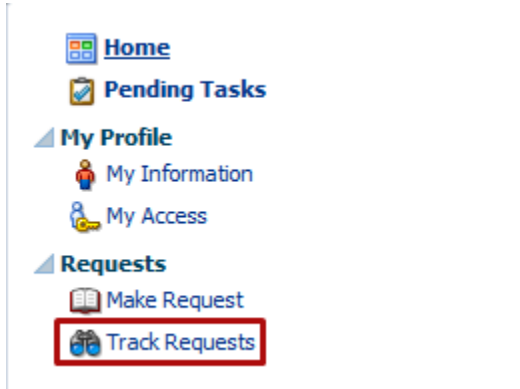


9.  Add the PDF form as an attachment.

10. Approve the request to send it on to your manager/sponsor for approval.

## Tracking a Request

To check on the status of an existing request follow these instructions.

1. Log into OIM using your normal account.
2. Click on **Requests > Track Requests**

   ▦ **Home**
   📋 **Pending Tasks**
   ◢ **My Profile**
   　🧑 My Information
   　🔑 My Access
   ◢ **Requests**
   　📖 Make Request
   　🔍 Track Requests

3. The **Show** field defaults to **Requests Raised by Me**. To look up requests for others or request for you that were created by others change this setting before searching.
   a. **Requests Raised By Me**
   b. **Requests Raised For Me**
   c. **For a User** (Search All for Security Coordinators, HelpDesk, and Admins only)
   　　i. You must enter a requestor or beneficiary for the **For a User** option.

**Track Request**

◢ **Search**                                                                          Saved Search  Search Requests  ▼

Match ⦿ All ◯ Any
Request ID  Starts with ▼ [                ]        Requested Date  Equals ▼ [          ] 📅
Status  Equals ▼ [                ]                 Beneficiary  Equals ▼ [          ] 🔍
Request Type  Equals ▼ [                ]           Requester  Equals ▼ [          ] 🔍

                                                    Search    Reset    Save...    Add Fields ▼

**Search Results**                                                          Show  Requests Raised By Me ▼

Actions ▼  View ▼  ✖ Withdraw Request  ✖ Delete Request  🔄 Refresh  📑  🖼 Detach

| Row | Request ID | Request Type | Status | Requested Date | Requester |
|-----|-----------|--------------|--------|----------------|-----------|
| No data to display | | | | | |

4. The result will show request IDs and their status. Click on a request ID to review the details:

Actions ▼  View ▼  ✖ Withdraw Request  ✖ Delete Request  🔄 Refresh  📑  🖼 Detach

| Row | Request ID | Request Type | Status | Requested Date |
|-----|-----------|--------------|--------|----------------|
| 1 | Request ID: 328 | Provision Entitlement | Obtaining Operation Approval | April 24, 2015 |
| 2 | Request ID: 329 | Provision Entitlement | Request Completed | April 24, 2015 |
| 3 | Request ID: 330 | Provision Entitlement | Request Failed | April 24, 2015 |
| 4 | Request ID: 321 | Provision Entitlement | Request Failed | April 23, 2015 |
| 5 | Request ID: 319 | Provision Entitlement | Obtaining Operation Approval | April 24, 2015 |
| 6 | Request ID: 314 | Provision Entitlement | Request Awaiting child Requests Completion | April 24, 2015 |
| 7 | Request ID: 315 | Provision Entitlement | Request Failed | April 24, 2015 |
| 8 | Request ID: 317 | Provision Entitlement | Obtaining Operation Approval | April 24, 2015 |
| 9 | Request ID: 316 | Provision Entitlement | Request Failed | April 24, 2015 |

5. If the request has failed, click on the Request Failed link to see why:

**⊿ Summary Information**

| | | | |
|---|---|---|---|
| Request Id | 330 | Requester | ▮▮▮▮▮ |
| Requested Date | 4/24/2015 | Status | Request Failed |
| Effective Date | | Parent Request ID | 314 |
| Justification | | Request Type | Provision Entitlement |

**Request Error Details**                                                       ✕

IAM-2050126 : Invalid outcome Required training not complete. Request requires completion of: A00029,A00030,F00001 received from SOA for the request id 330.

6. In the Request Details tab you can see information about the request.
   a. If the request is a parent request, it will have multiple Request ID listed under Related Requests. If it is a child request, it will list the parent. You can switch back and forth by clicking on the related request ID.

**Request Details | Approval Details**

**⊿ Target Users**

| Display Name | E-mail |
|---|---|
| ▮▮▮▮▮ ⓘ | ▮▮▮▮▮ |

**⊿ Related Requests**

| Beneficiary | Request Id | Requested Item | Status |
|---|---|---|---|
| F2EE6679-7006-1... | 334 | HRMS DEV -- CUH... | Obtaining Operation Approval |
| F2EE6679-7006-1... | 335 | FIN DEV -- ePro P... | Request Failed |

**⊿ Cart Items**

| # | Display Name | | | |
|---|---|---|---|---|
| 1 | FIN DEV -- ePro Purch Dir | Select Non-Default Job For Request | Target Account: ▮▮▮ | ⓘ Details |
| 2 | HRMS DEV -- CUHRUIS PS Admin | Select Non-Default Job For Request | Target Account: ▮▮▮ | ⓘ Details |

7. In the **Approval Details** tab, double click on the title of the request. If the title does not appear, the request may be in a failed status or you may need to click **Refresh**.

**Request Details | Approval Details**

View ▾   ⟳ Refresh   ▦ Detach

| Row | Title | Task Status | Assignees |
|---|---|---|---|
| 1 | Request for Individual: ▮▮▮ for 41~CUHRUIS_QA_Engineer_NP | Assigned | IDM Approvers, ▮▮▮ |

Columns Hidden    1

8. You can review the workflow and see who the request is current assigned to:

| 1 | ⊿ 🔲 Stage1 | |
|---|---|---|
| | 👤 **IDM Approvers,** ▮▮▮▮▮ - Manager Approval | |
| 1.1 | Approved | Apr 24, 2015 |
| | ▮▮▮▮▮ | |
| | 👤 **HRMS Security Coordinator - System, IDM Approvers** - Campus Se | |
| 1.2 | Assigned | Apr 24, 2015 |
| | ▮▮▮▮▮ | |

9. And see who has approved or rejected the request:
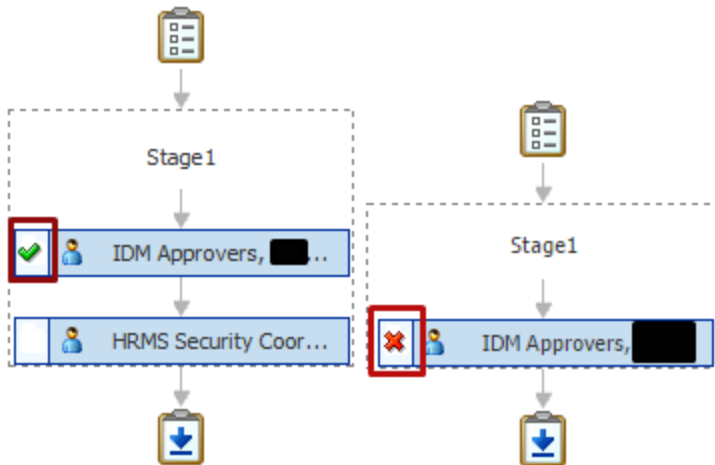
10. You can review any comments.
    a. Reason for rejection
    b. Request for information



11. And review any attachments

# My Access

You can review your existing access using the **My Profile > My Access** page.

1. Click on My Access in the left-hand navigation:
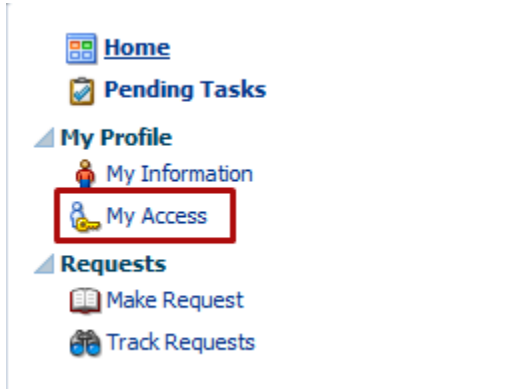
   

2. You will have four (4) tabs in the My Access page:

   a. Application Roles

   b. Application Accounts

   c. Enterprise Privileges (For OIM Only)

   d. OIM Admin Roles (For OIM Only)

**3. Application Roles**

   a. This tab will show your existing application roles listed by **Application Instance** (HRMS DEV) and **Account Name** (SMIT000001).

   b. From here you can request additional access by clicking on the **Request Entitlements** button. This will take you to the Make Request page to start a new request.

**4. Application Accounts**

   a. This tab will show the accounts you have in various applications and IT Resources.

   b. There is a Request Accounts button, but you should not use this. Requests will be denied.

# Appendix

## URLs

- [OIM Links, Information, and Guides](#)
- [UIS Service Desk](#)

OIM Process Guide
April 2015 | Prepared by: UIS-Identity and Access Management