



University of Colorado

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# CU Identity Manager

## Process Guide:

### Process Guide for Managers and Sponsors



## Contents

Manager/Sponsor Approvals or Rejections .....	3
For Support with OIM .....	3
Manager/Sponsor Role in Approving Access .....	3
Training Requirements .....	3
The Request Approval Process .....	3
Initiating Requests for Others.....	10
Tracking a Request .....	12
Assign a Proxy .....	15
Appendix .....	17
URLs .....	17



## Manager/Sponsor Approvals or Rejections

### For Support with CU Identity Manager

For questions or support related to CU Identity Manager functionality contact the [UIS Service Desk](#) or [Access Management](#)

### Manager/Sponsor Role in Approving Access

If you are a direct manager of an employee or the sponsor of a Type 15 Person of Interest (POI), you are responsible for approving access for your employee(s) or POI(s).

**NOTE:** For POIs **ONLY** POI type 15 can request access to a CU application or IT resource.

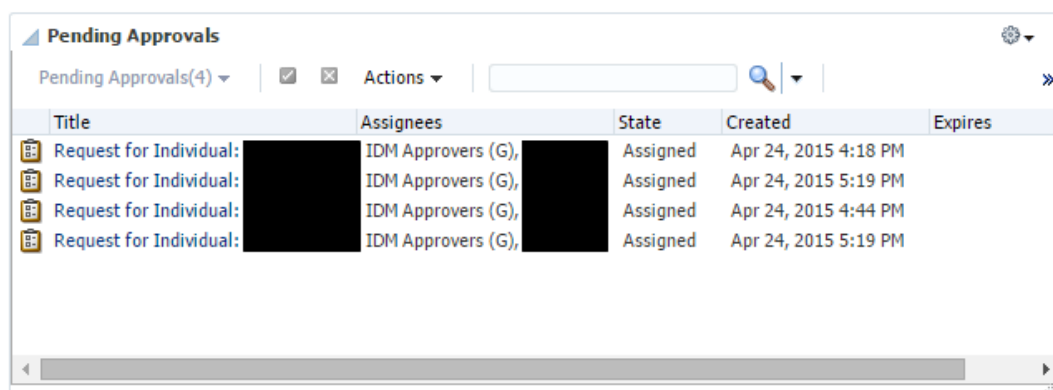
### Training Requirements

CU Identity Manager 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 HCM database for In-Person courses.

**NOTE:** Training will need to show as completed in SkillSoft and/or HCM 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.

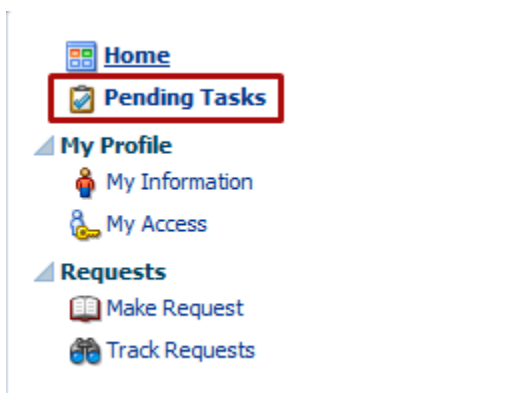
### The Request Approval Process

1. You should receive an email for any requests entered by employees of POIs for which you are the manager/sponsor. You will receive an email for EACH entitlement requested and must approve or deny each one individually.
2. You may click on the link in the email or log directly into CU Identity Manager.
3. After logging in you will see a **Pending Approvals** section in your **Home** page OR you can click on **Pending Tasks**.



Title	Assignees	State	Created	Expires
Request for Individual: [redacted]	IDM Approvers (G), [redacted]	Assigned	Apr 24, 2015 4:18 PM	
Request for Individual: [redacted]	IDM Approvers (G), [redacted]	Assigned	Apr 24, 2015 5:19 PM	
Request for Individual: [redacted]	IDM Approvers (G), [redacted]	Assigned	Apr 24, 2015 4:44 PM	
Request for Individual: [redacted]	IDM Approvers (G), [redacted]	Assigned	Apr 24, 2015 5:19 PM	





4. In your pending tasks you will see any requests that are waiting for your approval.

5. **Quick Approvals:**

- a. Select one request by clicking somewhere on the request line other than the title:

**Pending Approvals**

Pending Approvals(4) ☒ ☐ Actions

Title	Assignees	State	Created	Expires
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 4:18 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 5:19 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 4:44 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 5:19 PM	

- b. Select multiple requests to approve at once by holding shift (for a range) or Ctrl (for individual requests).

**Pending Approvals**

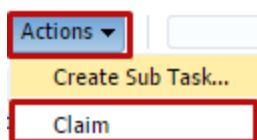
Pending Approvals(4) ☒ ☐ Actions

Title	Assignees	State	Created	Expires
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 4:18 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 5:19 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 4:44 PM	
Request for Individual: [REDACTED]	IDM Approvers (G), [REDACTED]	Assigned	Apr 24, 2015 5:19 PM	

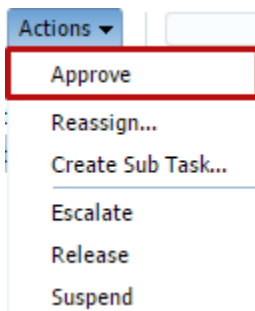
- c. Then **Claim** the request(s):

1. click on **Actions** and then **Claim**:





2. Now that you have claimed the request you will see new items in the Actions menu allowing you to approve the request(s):



- d. Alternatively you may:
  - i. **Reassign** the approval to another user (for providing manager/sponsor approval)
  - ii. **Escalate** the approval to YOUR manager
  - iii. **Suspend** – Pause the request
  - iv. **Release** – Un-pause the request
  - v. **Create a Sub-Task** – This allows you to create a separate related task to any user.

#### 6. Detailed Approvals and Rejections

- a. Instead of selecting the request(s) to approve, click on the title of the individual request.
- b. The request detail tab will open showing detailed information about the request.
- c. You may claim the request on this screen if you have not already:



- d. After claiming the request you may do the following:
  1. View where the request is at in the workflow and where it goes next in the **Approvals** tab

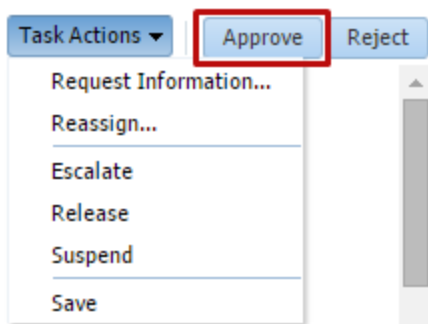


2. **Request Additional Information** from the Requestor. See section below on [requesting more information](#).

#### e. **Approving a Request**

- i. To approve a request, click on the Approve button in the upper right corner:

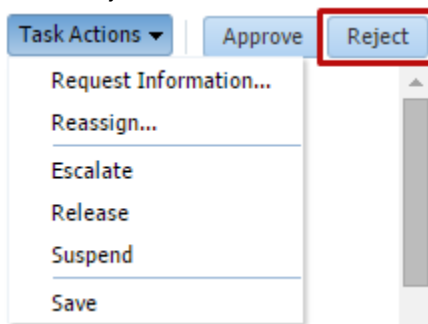




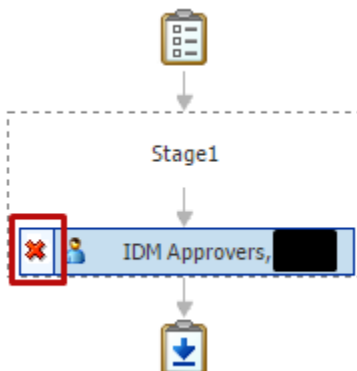
- ii. The request will be routed to the appropriate application/campus security coordinator for approval.
- iii. **NOTE:** If you encounter a pop-up error when approving this may be a known CU Identity Manager bug. Despite the error the task was approved. Refresh your pending tasks and ensure that the request is no longer in your pending list.

**f. Rejecting a Request**

- i. To reject a request, first add a comment in the comments box explaining the reason for the rejection. Then click on the Reject button.



- ii. You will be routed back to the Inbox/Pending Tasks page. Refresh the page with the icon on the upper right and you should see the request removed from your pending list.
- iii. The user will receive a notification that the request was rejected and you will see in the workflow diagram that the request was rejected:



**g. Adding an attachment**



- i. If you need to attach a document for supporting information to a request, you may do so on the Approval tab of the Request Details page:

#### Attachments



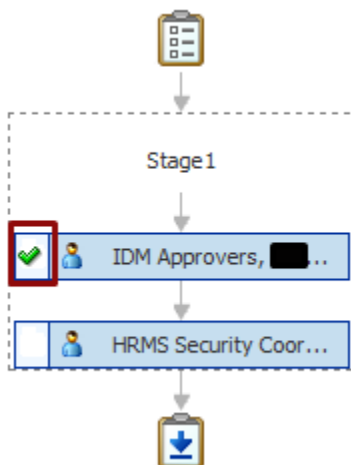
Name	Updated By	Date Updated
No data to display		

#### h. Viewing Workflow Status

- i. 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	Stage1
1.1	<b>IDM Approvers, [redacted]</b> - Manager Approval Approved Apr 24, 2015 
1.2	<b>HRMS Security Coordinator - System, IDM Approvers</b> - Campus Se Assigned Apr 24, 2015 

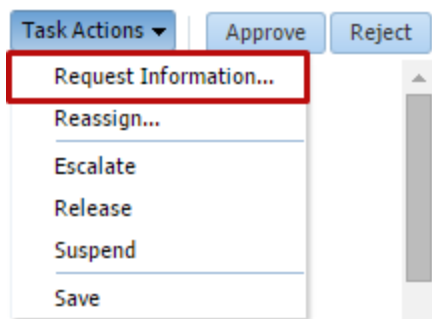
- ii. In the lower image you will see a green check if the approver has approved the request.



#### 7. Requesting More Information from the Requestor:

- a. In the Request Details screen of a claimed request, instead of approving or denying a request you may want to obtain more information for a requestor about what they need. To do this click on Actions and Request Information:





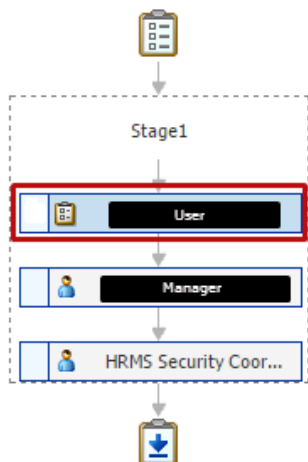
- b. A screen will open to enter your information request to the requestor. Enter your question/request and click ok. Do not be concerned with the Participant ID, this is your Constituent ID/CU Identity Manager user account. Leave the return option as Require subsequent participants to retake action.

A screenshot of a 'Request More Information' dialog box. The dialog has a title bar with a close button. Inside, there are two radio buttons under the 'From' label: 'Participant' (selected) and 'Other users'. The 'Participant' option has a dropdown menu showing 'f2ee6679-7006'. Below this is a large text area labeled 'Comments:'. At the bottom, there are two radio buttons under the 'Return Options' label: 'Route directly back to me' and 'Require subsequent participants to retake action' (selected). There are 'OK' and 'Cancel' buttons at the bottom right.

- c. The request will be assigned back to the requestor with a task to provide more information about the specific request. You will see this in the workflow diagrams in the **Approval** tab:

1	Stage1
1.1	<div>Information Requested</div> <div>Apr 27, 2015</div>
1.2	IDM Approvers - Manager Approval
1.3	HRMS Security Coordinator - System, IDM Approvers - Campus Ser





- d. After the Requestor has responded to the task, it will be re-assigned to you for further action.
- e. The user will see the task reassigned to them in the **Pending Approvals** section of the **Home** page and in the **Pending Tasks** page:

**Pending Approvals**

Pending Approvals(3) | [Check] [X] Actions | [Search] | Assigned [Dropdown] [More]

Title	Assignees	State	Created	Expires
[Icon] Request for Individual: [Redacted]	[Redacted]	Info Requested	Apr 24, 2015 5...	
[Icon] Request for Individual: [Redacted]	[Redacted]	Assigned	Apr 24, 2015 1...	
[Icon] Request for Individual: [Redacted]	[Redacted]	Assigned	Apr 24, 2015 3...	

- f. The user will click on the request title to open the details page. They will then enter a comment to respond to you:

**Comments** [Icon]

No data to display

- g. They will enter their response and then in the **Actions** menu select **Submit Information**:

**Task Actions** [Dropdown]

- Reassign...
- Withdraw
- Submit Information**
- Save

- h. Their response will then be assigned to you and their response will be recorded in the **comments** section of the request details page on the **Approvals** tab.




## Initiating Requests for Others

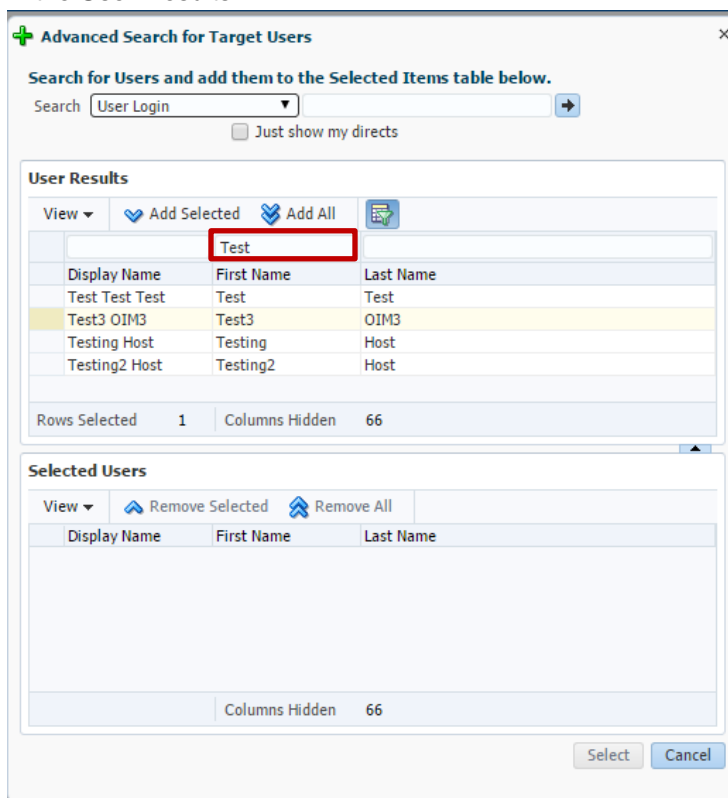
You may initiate an Access Request for another user. In this case the request will not go to the user themselves, but after you submit the request it will go to the manager/sponsor for approval and then to the appropriate security coordinator for approval.

1. Login to OIM.
2. Search and Sort the catalog in **Make Request** as you normally would.
3. Set the **Request For** value to **Others** and click on the **green plus** to add users:

### Request For


☐ Myself
 ☒ Others
 


4. In the Search Users window you can search by a variety of fields such as Employee Number (hremplid), First Name, and Last Name. You may also type into the search space above the columns in the User Results.






**Advanced Search for Target Users**

Search for Users and add them to the Selected Items table below.

Search  

☐ Just show my directs



**User Results**

View  Add Selected  Add All 

Display Name	First Name	Last Name
Test	Test	Test
Test3 OIM3	Test3	OIM3
Testing Host	Testing	Host
Testing2 Host	Testing2	Host

Rows Selected 1 Columns Hidden 66


**Selected Users**

View  Remove Selected  Remove All

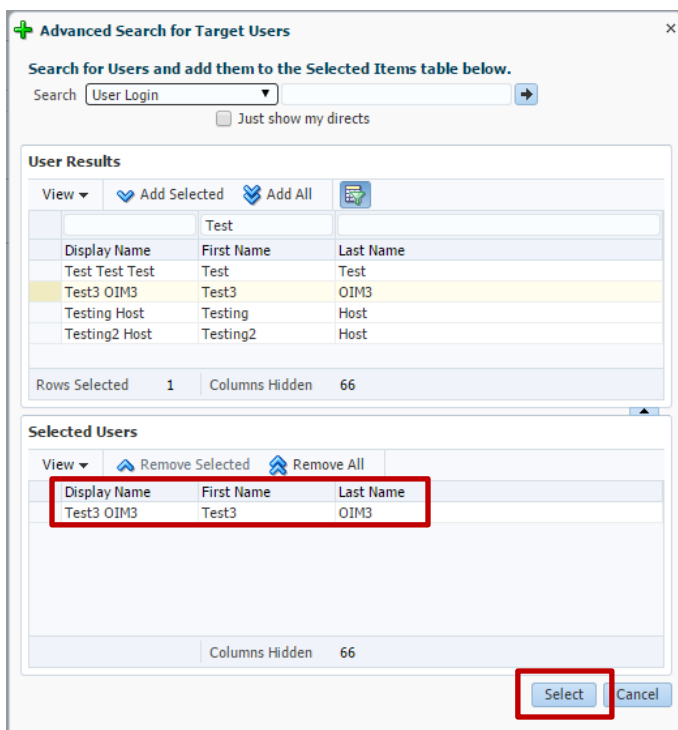
Display Name	First Name	Last Name
--------------	------------	-----------

Columns Hidden 66

Select Cancel

5. You may select one or more user and Add them by clicking on  **Add Selected** such that they are added to the Selected Users section:





**Advanced Search for Target Users**

Search for Users and add them to the Selected Items table below.

Search:

☐ Just show my directs

**User Results**

View

Display Name	First Name	Last Name
Test Test Test	Test	Test
Test3 OIM3	Test3	OIM3
Testing Host	Testing	Host
Testing2 Host	Testing2	Host

Rows Selected: 1 Columns Hidden: 66

**Selected Users**

View

Display Name	First Name	Last Name
Test3 OIM3	Test3	OIM3

Columns Hidden: 66

6. You will now see the users added to the request:

### Request For

☐ Myself ☒ Others

Test Test Test

Test3 OIM3

7. When you have selected the users and the application roles (entitlements) to the shopping cart, checkout.
8. On the checkout page you have another opportunity to add users to the request by adding rows with the Target Users:

 **Target Users**

#	Name
---	------

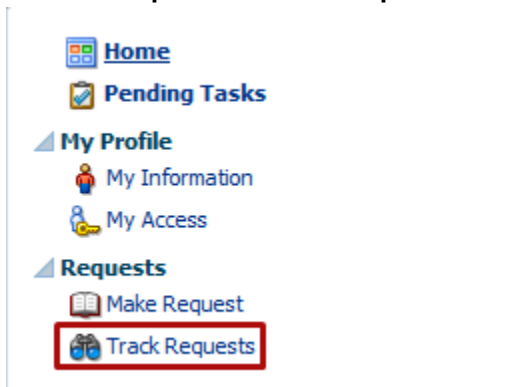
9. ALL the users added to the cart will have requests for ALL the roles (entitlements) requested. The request will be broken up and assigned to the correct manager and security coordinator based on each user's job, campus, and the application.
10. Submit the request.



## Tracking a Request

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

1. Log into CU Identity Manager using your normal account.
2. Click on **Requests > Track Requests**



3. The **Show** field defaults to **Requests Raised by Me**. To look up requests for others or requests 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 <input checked="" type="checkbox"/> Withdraw Request <input checked="" type="checkbox"/> Delete Request <input checked="" type="checkbox"/> Refresh <input checked="" type="checkbox"/> Detach					
Row	Request ID	Request Type	Status	Requested Date	
1	<a href="#">Request ID: 328</a>	Provision Entitlement	Obtaining Operation Approval	April 24, 2015	
2	<a href="#">Request ID: 329</a>	Provision Entitlement	Request Completed	April 24, 2015	
3	<a href="#">Request ID: 330</a>	Provision Entitlement	Request Failed	April 24, 2015	
4	<a href="#">Request ID: 321</a>	Provision Entitlement	Request Failed	April 23, 2015	
5	<a href="#">Request ID: 319</a>	Provision Entitlement	Obtaining Operation Approval	April 24, 2015	
6	<a href="#">Request ID: 314</a>	Provision Entitlement	Request Awaiting child Requests Completion	April 24, 2015	
7	<a href="#">Request ID: 315</a>	Provision Entitlement	Request Failed	April 24, 2015	
8	<a href="#">Request ID: 317</a>	Provision Entitlement	Obtaining Operation Approval	April 24, 2015	
9	<a href="#">Request ID: 316</a>	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  
 Requested Date 4/24/2015  
 Effective Date  
 Justification

Requester [Redacted]  
**Status Request Failed**  
 Parent Request ID 314  
 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.
- If the request is a parent request, it will have multiple Request IDs 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
[Redacted]	[Redacted]

**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		Target Account:	Details
1	FIN DEV -- ePro Purch Dir	Select Non-Default Job For Request	[Redacted]	Details
2	HRMS DEV -- CUHRUIS PS Admin	Select Non-Default Job For Request	[Redacted]	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: [Redacted] For 41~CUHRUIS_QA_Engineer_NP	Assigned	IDM Approvers: [Redacted]

Columns Hidden 1

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

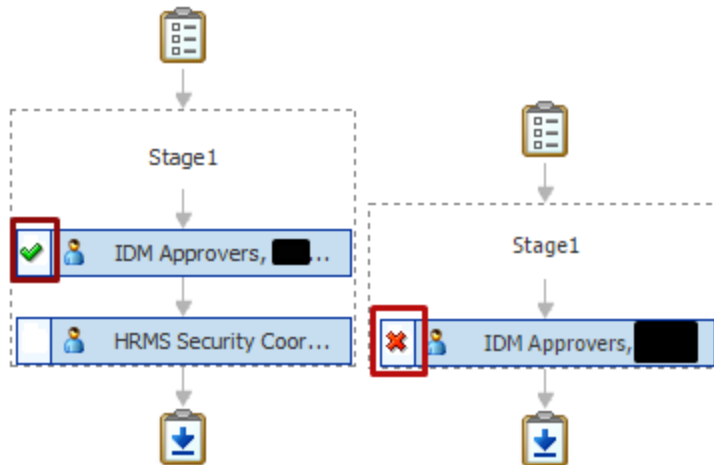
1 Stage 1

1.1 IDM Approvers, [Redacted] - Manager Approval  
 Approved Apr 24, 2015  
 [Redacted]

1.2 HRMS Security Coordinator - System, IDM Approvers - Campus Se  
 Assigned Apr 24, 2015  
 [Redacted]

9. And see who has approved or rejected the request:





10. You can review any comments:
- Reason for rejection
  - Request for information

#### Comments

No data to display

11. And review any attachments

#### Attachments



Name	Updated By	Date Updated
HCM-Comp-Contr	8ae9b349-72b3-11e2 00505691002b	

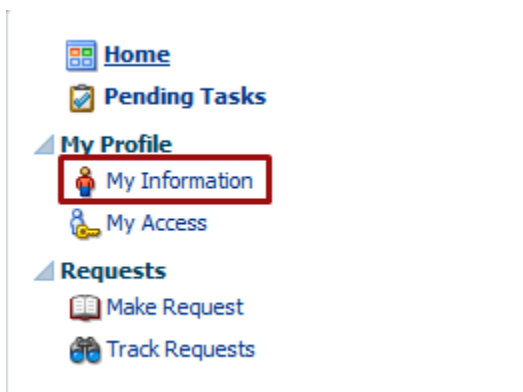
:



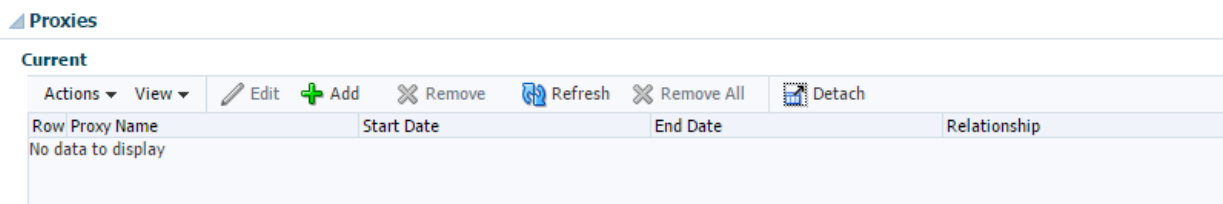
## Assign a Proxy

If you are going to be out of the office and would like to assign a proxy to approve access requests on your behalf, you may do so in CU Identity Manager. You may also define a long-term proxy to approve requests on your behalf simply by using a longer date range.

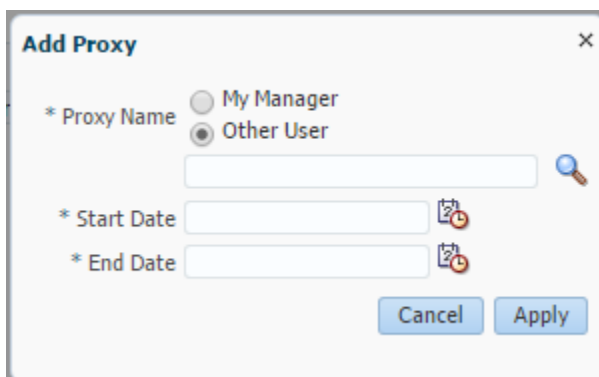
1. Log into CU Identity Manager.
2. Go to the **My Profile > My Information** page:



3. Scroll down to the Proxy section.



4. Add a proxy:

A screenshot of the 'Add Proxy' dialog box. It contains fields for Proxy Name (with radio buttons for 'My Manager' and 'Other User'), Start Date, and End Date. There are 'Cancel' and 'Apply' buttons at the bottom.

5. You may select the manager associated with your primary job, or you may look up another user.
6. Set a start and end date. During this period the proxy will have access to your pending approvals and can claim them and approve or reject as you would.



Proxies

Current

Actions ▾View ▾

Edit

Add

Remove

Refresh

Remove All

Detach

Row	Proxy Name	Start Date	End Date	Relationship
1	Barry Henry Allen	4/30/2015	8/31/2015	Other

7. The proxy will expire at the end date set, or you can remove them to inactivate their proxy status.



## Appendix

### URLs

- [CU Identity Manager Links, Information, and Guides](#)
- [UIS Service Desk](#)