University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

# 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.

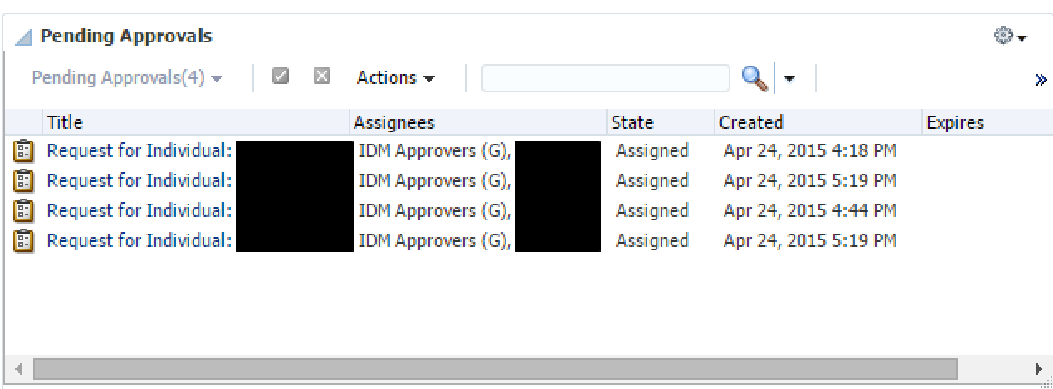
## Training Requirements

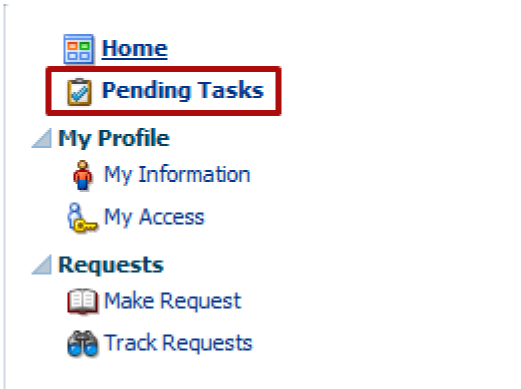
CU Identity Manager will perform checks for training to ensure required training has been completed for each requested entitlement. The request(s) will fail if training requirements have not been fulfilled and will not be assigned to the manager. Training is checked against SkillSoft directly and against 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.

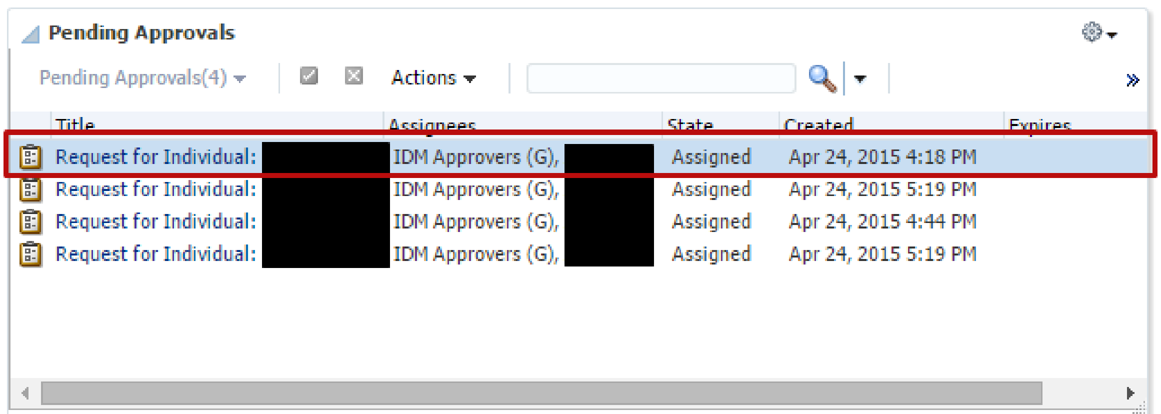
## The Request Approval Process

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**.

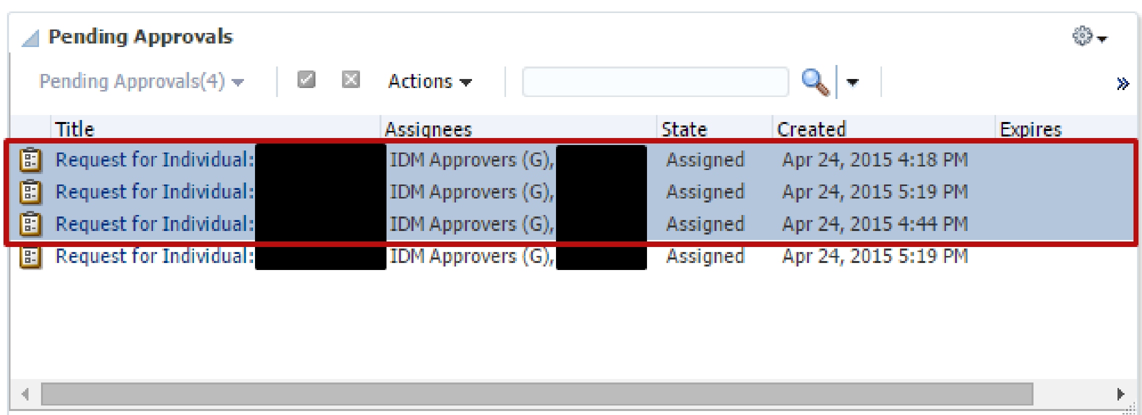




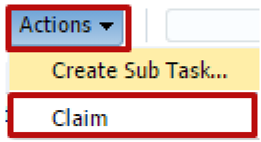

4. In your pending tasks you will see any requests that are waiting for your approval.
5. **Quick Approvals:**
   a. Select one request by clicking somewhere on the request line other than the title:



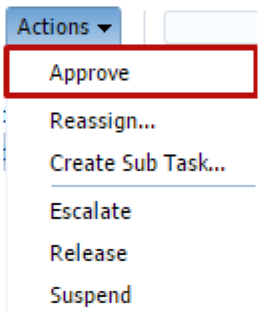

   b. Select multiple requests to approve at once by holding shift (for a range) or Ctrl (for individual requests).




   c. Then **Claim** the request(s):
      1. click on **Actions** and then **Claim:**

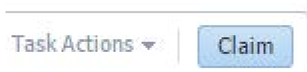



2. Now that you have claimed the request you will see new items in the Actions menu allowing you to approve the request(s):



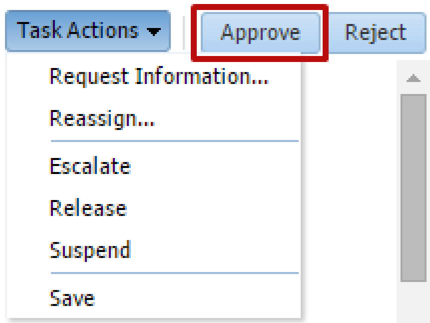

d. Alternatively you may:
   i. **Reassign** the approval to another user (for providing manager/sponsor approval)
   ii. **Escalate** the approval to YOUR manager
   iii. **Suspend** – Pause the request
   iv. **Release** – Un-pause the request
   v. **Create a Sub-Task** – This allows you to create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

6. <u>**Detailed Approvals and Rejections**</u>
   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:

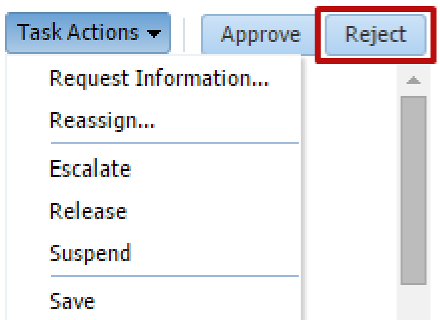



ii. The request will be routed to the appropriate application/campus security coordinator for approval.

iii. <u>**NOTE:**</u> 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.

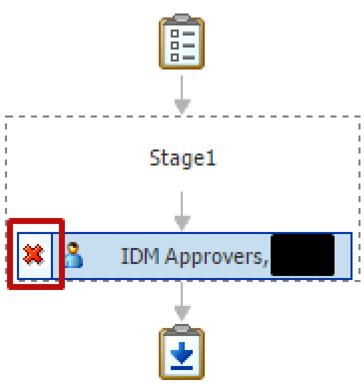
**f. Rejecting a Request**

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.



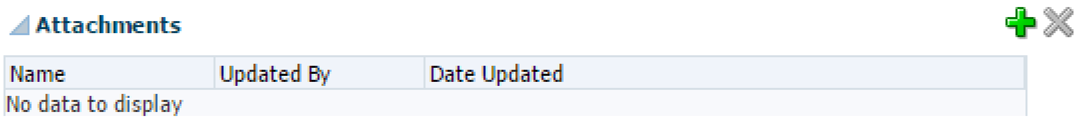

ii. You will be routed back to the Inbox/Pending Tasks page. Refresh the page with the icon on the upper right and you should see the request removed from your pending list.

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:



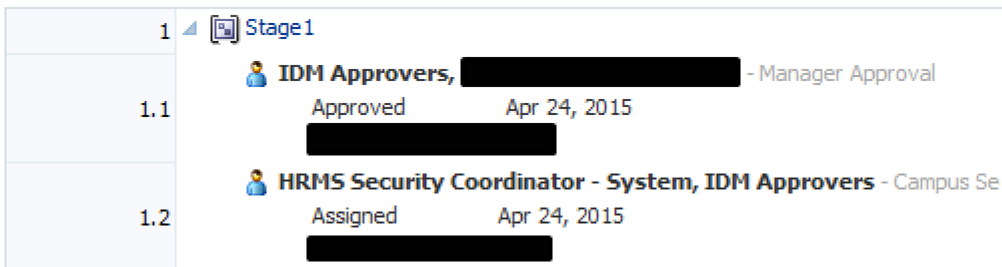

**g. Adding an attachment**

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:

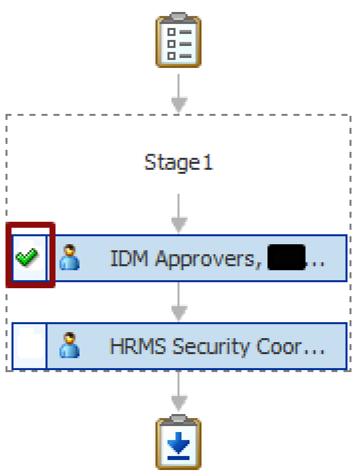



**h. Viewing Workflow Status**

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.

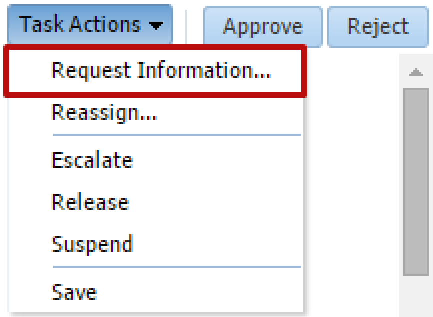



ii. In the lower image you will see a green check if the approver has approved the request.

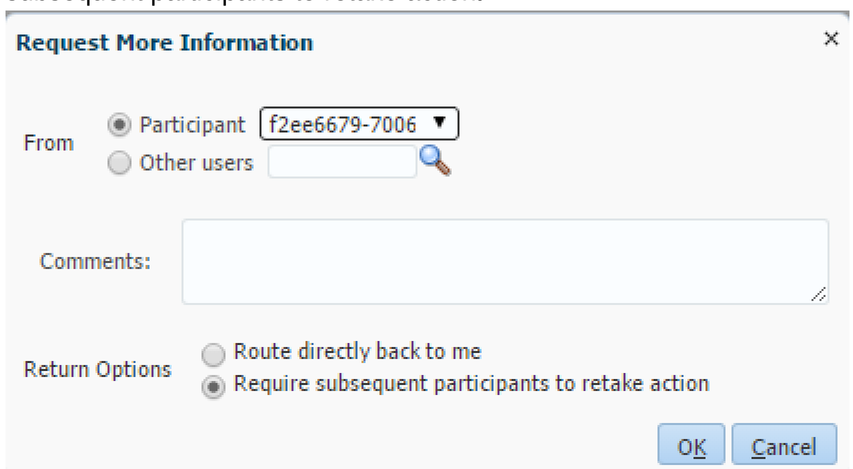



## 7. Requesting More Information from the Requestor:

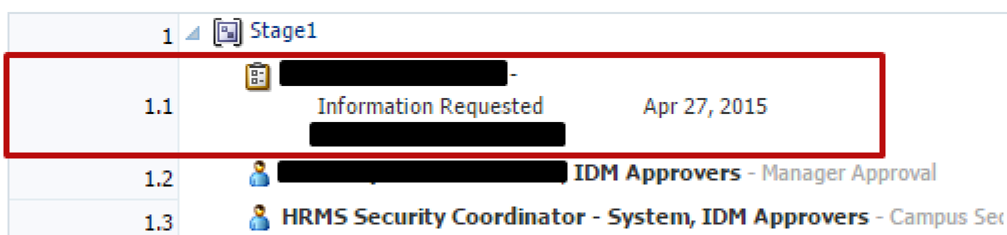
a. In the Request Details screen of a claimed request, instead of approving or denying a request you may want to obtain more information for a requestor about what they need. To do this click on Actions and Request Information:

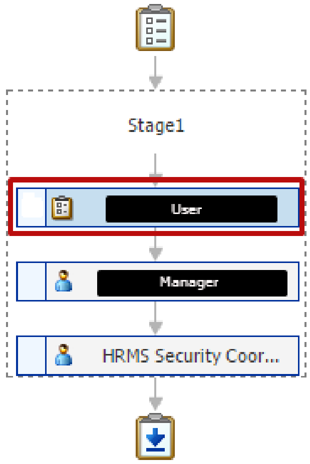



b. A screen will open to enter your information request to the requestor. Enter your question/request and click ok. Do not be concerned with the Participant ID, this is your Constituent ID/CU Identity Manager user account. Leave the return option as Require subsequent participants to retake action.

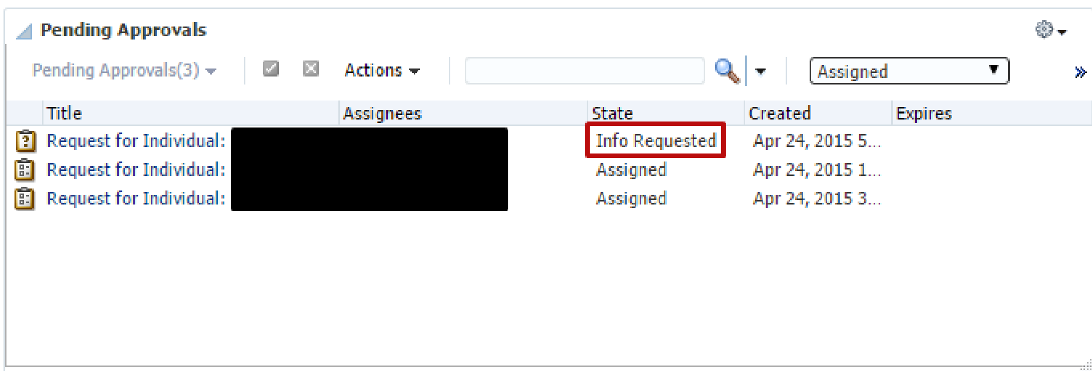



c. The request will be assigned back to the requestor with a task to provide more information about the specific request. You will see this in the workflow diagrams in the **Approval** tab:

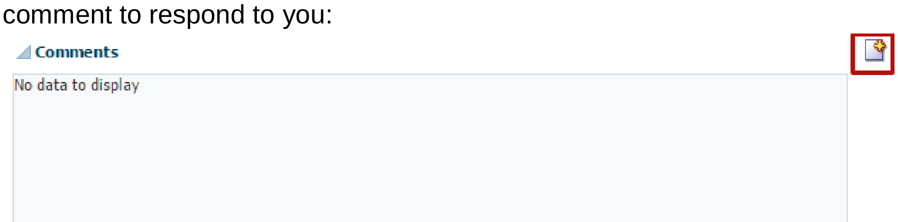




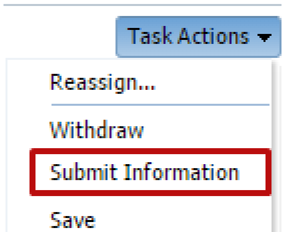

d. After the Requestor has responded to the task, it will be re-assigned to you for further action.
e. The user will see the task reassigned to them in the **Pending Approvals** section of the **Home** page and in the **Pending Tasks** page:




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




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

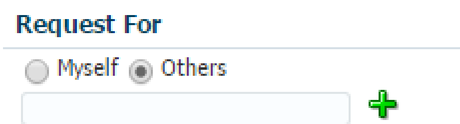



h. Their response will then be assigned to you and their response will be recorded in the **comments** section of the request details page on the **Approvals** tab.

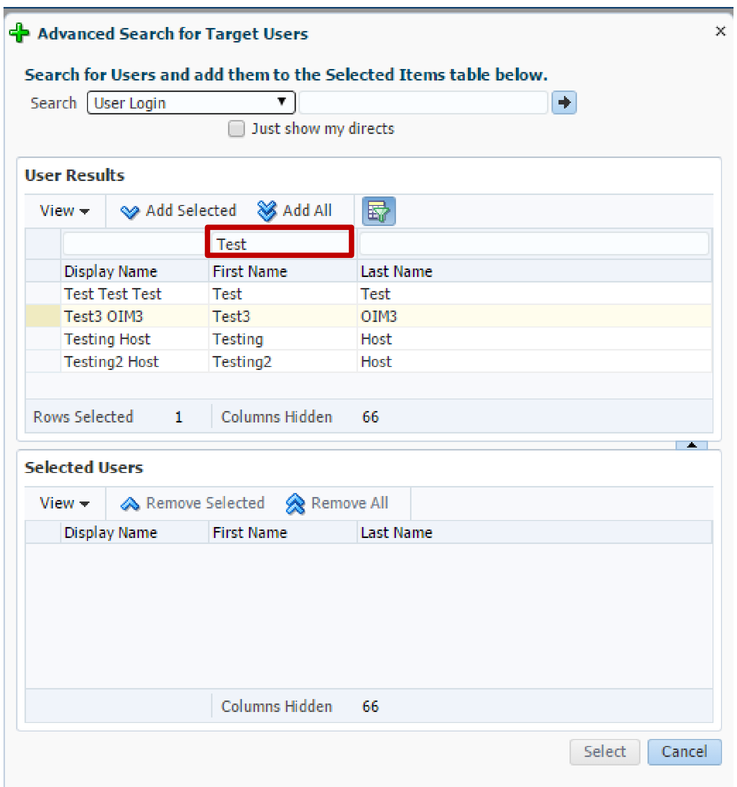
# Initiating Requests for Others

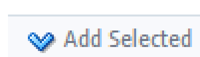
You may initiate an Access Request for another user. In this case the request will not go to the user themselves, but after you submit the request it will go to the manager/sponsor for approval and then to the appropriate security coordinator for approval.

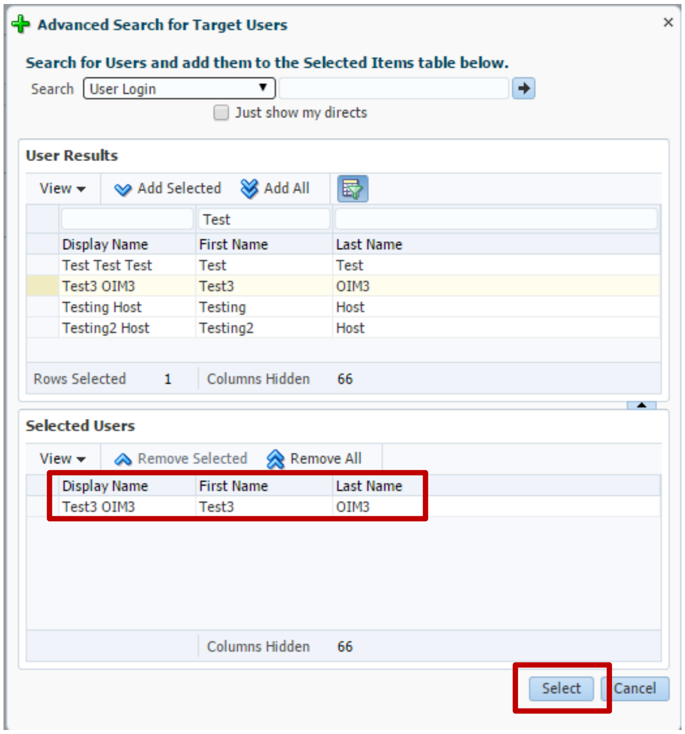
1. Login to OIM.
2. Search and Sort the catalog in **Make Request** as you normally would.
3. Set the **Request For** value to **Others** and click on the **green plus** to add users**:**



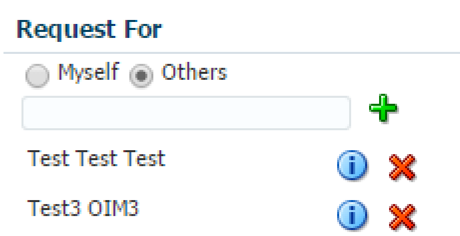

4. In the Search Users window you can search by a variety of fields such as Employee Number (hremplid), First Name, and Last Name. You may also type into the search space above the columns in the User Results.




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




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



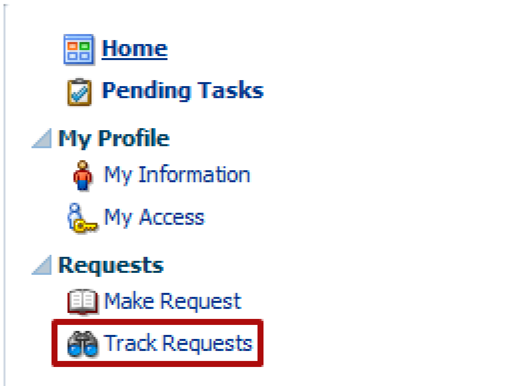

7. When you have selected the users and the application roles (entitlements) to the shopping cart, checkout.
8. On the checkout page you have another opportunity to add users to the request by adding rows with the Target Users:


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.

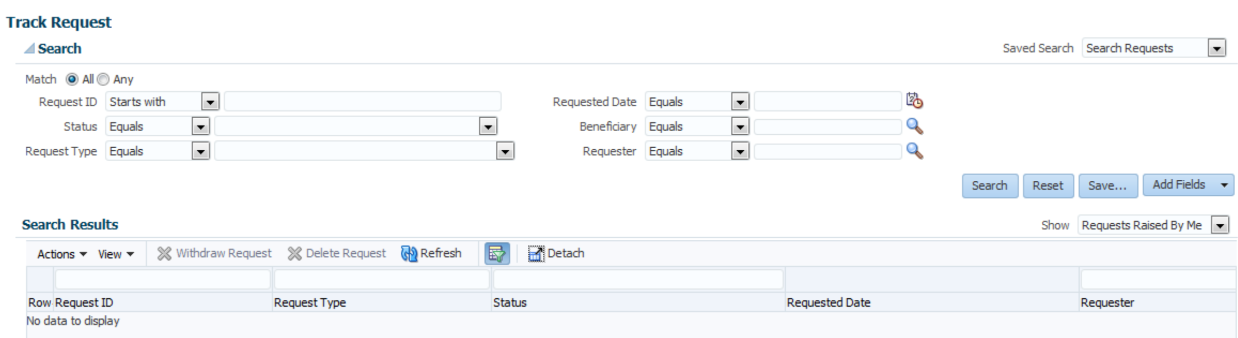
# Tracking a Request

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

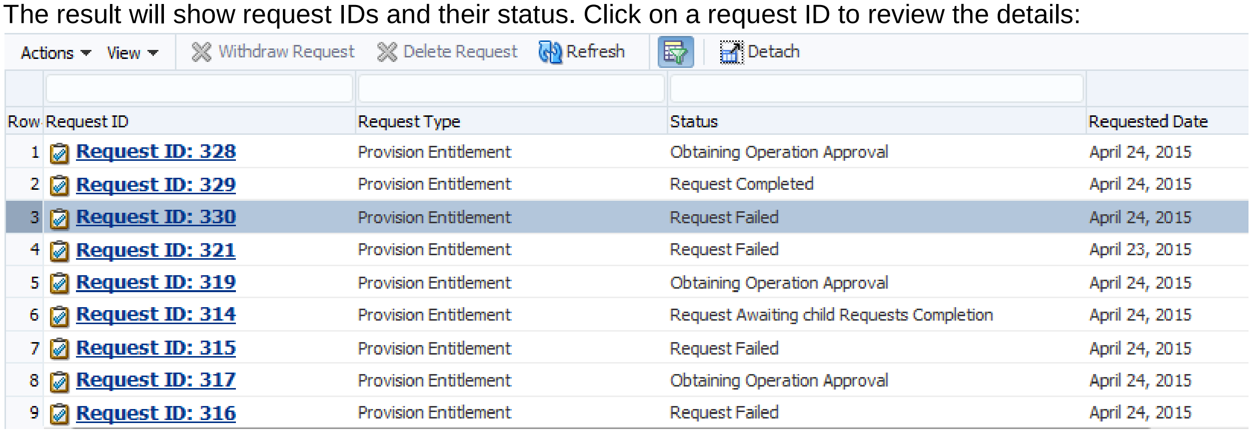
1. Log into CU Identity Manager using your normal account.
2. Click on **Requests > Track Requests**




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.



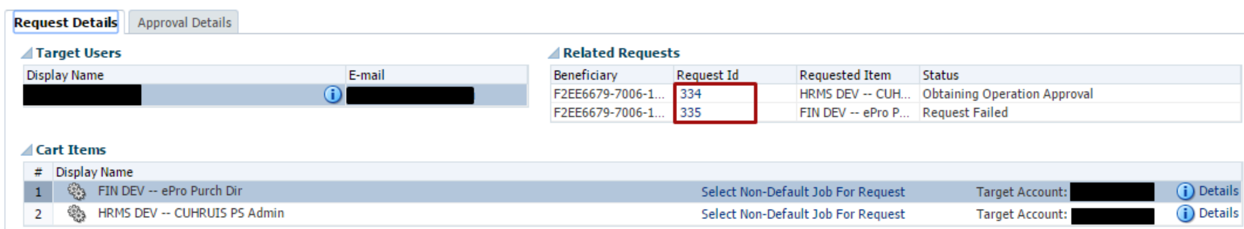

4. The result will show request IDs and their status. Click on a request ID to review the details:



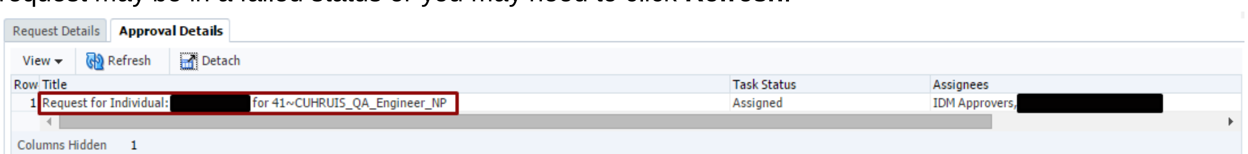

| Row | Request ID | Request Type | Status | Requested Date |
|---|---|---|---|---|
| 1 | Request ID: 328 | Provision Entitlement | Obtaining Operation Approval | April 24, 2015 |
| 2 | Request ID: 329 | Provision Entitlement | Request Completed | April 24, 2015 |
| 3 | Request ID: 330 | Provision Entitlement | 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:

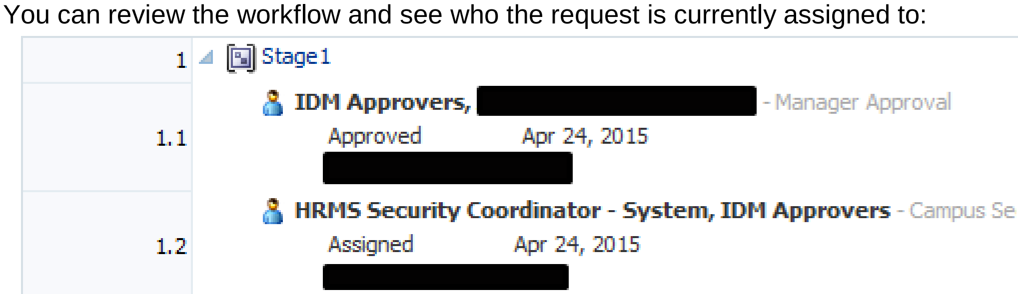

6. In the Request Details tab you can see information about the request.
   a. If the request is a parent request, it will have multiple Request IDs listed under Related Requests. If it is a child request, it will list the parent. You can switch back and forth by clicking on the related request ID.



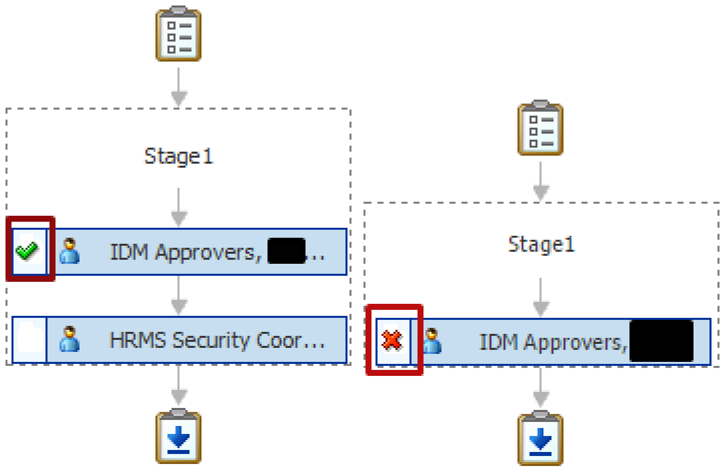

7. In the **Approval Details** tab, double click on the title of the request. If the title does not appear, the request may be in a failed status or you may need to click **Refresh**.



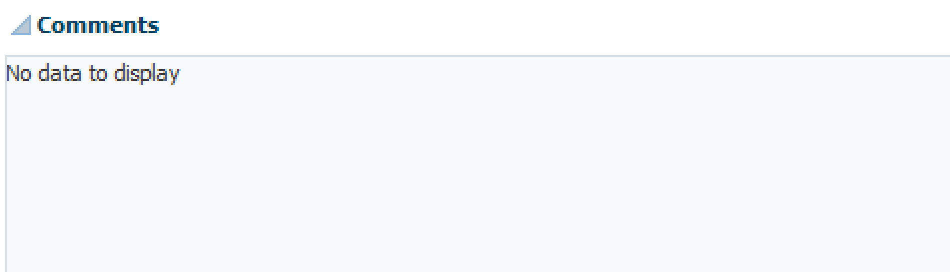

8. You can review the workflow and see who the request is currently assigned to:



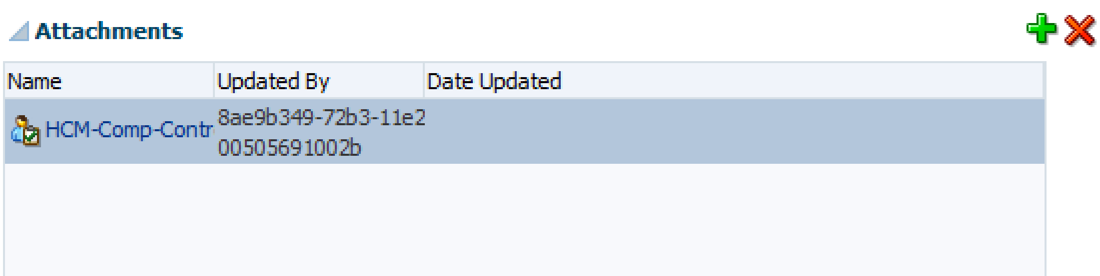

9. And see who has approved or rejected the request:




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




11. And review any attachments

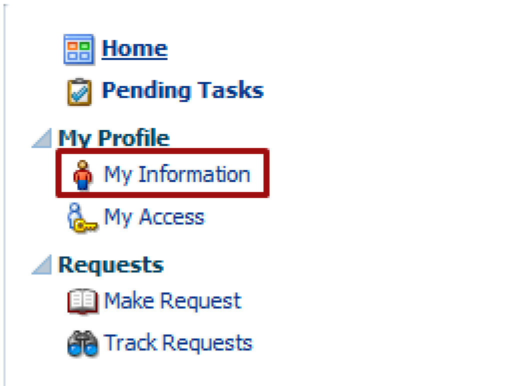



:

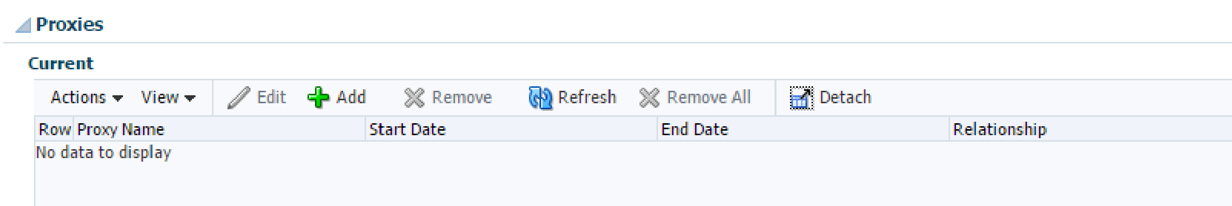
# Assign a Proxy

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.

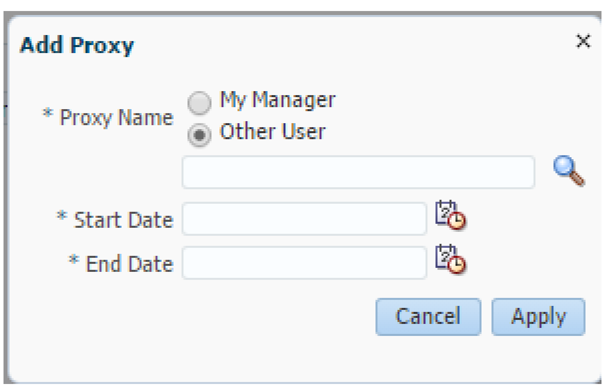
1. Log into CU Identity Manager.
2. Go to the **My Profile > My Information** page:



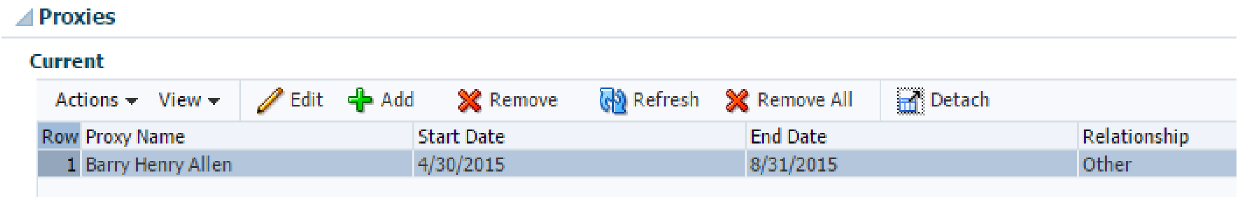

3. Scroll down to the Proxy section.




4. Add a proxy:




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.




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