Oracle Identity Manager

Process Guide:

OIM Process Guide for Managers and Sponsors
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Manager/Sponsor Approvals or Rejections

For Support with OIM

For questions or support related to OIM 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

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.

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.

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 logged directly into OIM.
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. No that you have claimed the request you will see new items in the Actions menu allowing you to approve the request(s):

   ![Actions Menu]
   - Reassign
   - Create Sub Task
   - Approve
   - Reassign...
   - Create Sub Task...
   - Escalate
   - Release
   - Suspend

   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:

   ![Task Actions]
   - Task Actions
   - Claim

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

      ![Request Details]
      - Request Details
      - Approvals
      - Target Users

      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 OIM 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 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 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:

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Updated By</th>
<th>Date Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No data to display</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

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
   - IDM Approvers, [redacted] - Manager Approval
     Approved  Apr 24, 2015
   1.2
   - HRMS Security Coordinator - System, IDM Approvers - 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/OIM 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:

![Pending Approvals screenshot]

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 page]

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

![Task Actions]

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.
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

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.
   - Requests Raised By Me
   - Requests Raised For Me
   - 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:
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 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.

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 current assigned to:

9. And see who has approved or rejected the request:
10. You can review and 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 OIM. You may also define a long-term proxy to approve requests on your behalf simply by using a longer date range.

1. Log into OIM.
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

- OIM Links, Information, and Guides
- UIS Service Desk