Oracle Identity Manager

Process Guide:

OIM Process Guide for Requesting Access
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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.

   ![Catalog](image)

   Catalog

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

   ![Catalog](image)

   Catalog

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.
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.
   
   b. Remove any entitlements from your 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.

10. Once you have submitted your request, you will arrive at 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.

   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.
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.

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.

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.

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:
   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:

![Application Roles Image]

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

![Checkout Page Image]

6. Submit your request:

   ![Remove Entitlements]

   Successfully Completed the operation.

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 your 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**
     - Job Data - ApprAllCU
     - Job Data - ApprClassStaff
     - Job Data - ApprFellowships
     - Job Data - ApprMedicalRes
     - Job Data - ApprOffExpProf
     - Job Data - ApprOtherFaculty
     - Job Data - ApprRegularFaculty
     - Job Data - ApprResearchFaculty
     - Job Data - ApprRetirees
     - Job Data - ApprStudentFaculty
     - Job Data – ApprStudentWorker
   - For **Position Data – Approval**
     - Position Data - ApprAllCU
     - Position Data - ApprClassStaff
     - Position Data - ApprFellowship
     - Position Data - ApprMedicalRes
     - Position Data - ApprOffExpProf
     - Position Data - ApprOtherFac
     - Position Data - ApprRegularFac
     - Position Data - ApprResFac
     - Position Data - ApprRetirees
     - Position Data - ApprStdntFac
     - Position Data – ApprStdntWrkr
   - For **Funding Distributn - Approval**
     - Funding Dist - ApprAllCU
     - Funding Dist - ApprClassStaff
     - Funding Dist - ApprFellowships
     - Funding Dist - ApprMedicalRes
     - Funding Dist - ApprOffExpProf
     - Funding Dist - ApprOtherFacult
     - Funding Dist - ApprRegularFac
     - Funding Dist - ApprResFac
     - Funding Dist - ApprRetirees
     - 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
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.
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 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