Novell
Identity Manager

3.0

USER APPLICATION: USER GUIDE

Novell®

Novell Trademarks

Novell is a registered trademark of Novell, Inc., in the United States and other countries.
SUSE is a registered trademark of Novell, Inc., in the United States and other countries.

Third-Party Materials

All third-party trademarks are the property of their respective owners.

Contents

About This Guide

Purpose

This book describes the **user interface** of the Novell Identity Manager user application and how you can use the features it offers, including:

- **Identity self-service** (for user information, passwords, and directories)
- **Requests and approvals** (using workflow-based provisioning) — if you have the Provisioning Module for Identity Manager

Audience

The information in this book is for **end users** of the Identity Manager user interface.

Prerequisites

This book assumes that you are using the **default configuration** of the Identity Manager user interface. However, it's quite possible that your version of the user interface has been customized to look or operate differently.

Before you get started, you should **check with your system administrator** for details on any customizations you might encounter.

Organization

Here's a summary of what you'll find in this book:

Part	Description
Part I, "Welcome to Identity Manager," on page 11	Introduction to the Identity Manager user interface and how to begin using it
Part II, "Using the Identity Self-Service Tab," on page 21	How to use the Identity Self-Service tab of the Identity Manager user interface to display and work with identity information, including: • Organization charts • Profiles (your identity details) • Directory searches • Passwords • User accounts (and more)

Part	Description
Part III, "Using the Requests & Approvals Tab," on page 93	How to use the Requests & Approvals tab of the Identity Manager user interface to:
	• Manage provisioning work (tasks and resource requests) for yourself or your team
	• Configure provisioning settings for yourself or your team
	NOTE: This part applies only if you have the Provisioning Module for Identity Manager.

Welcome to Identity Manager

Read this part first to learn about the Identity Manager user interface and how to begin using it.

Getting Started

<div style="text-align: right; font-size: 48px;">1</div>

This chapter tells you how to begin using the **Identity Manager user interface**. Topics include:

1.1 Identity Manager and you

Novell Identity Manager is a system software product that your organization uses to **securely manage the access needs of its user community**. If you're a member of that user community, you benefit from Identity Manager in a number of ways. For example, Identity Manager enables your organization to:

- Give users access to the **information** (such as group org charts, department white pages, or employee lookup) and **resources** (such as equipment or accounts on internal systems) that they need, right from day one
- Synchronize multiple passwords into a **single login** for all your systems
- Modify or revoke **access rights** instantly when necessary (such as when someone transfers to a different group or leaves the organization)
- Support **compliance** with government regulations

To bring these benefits directly to you and your team, Identity Manager provides a **user interface** that you can use **from your Web browser**.

1.1.1 Introducing the Identity Manager user interface

The Identity Manager user interface is your view into the information, resources, and capabilities of Identity Manager. Your **system administrator** determines the details of what you can see and do in the Identity Manager user interface. Typically, this includes:

- **Identity self-service**, which enables you to:
  - Display organization charts
  - Edit the information in your profile
  - Search a directory
  - Change your password
  - Create accounts for new users (if you are authorized)
- **Requests and approvals**, which enable you to:
  - Issue requests for resources
  - Check on the approval of your resource requests
  - Work on tasks assigned to you for approving other resource requests

- Perform requests and approvals as a proxy or delegate for someone else
- Assign someone else to be your proxy or delegate (if you are authorized)
- Manage all of these request and approval features for your team (if you are authorized)

NOTE: Requests and approvals require the Provisioning Module for Identity Manager.

1.1.2 The big picture
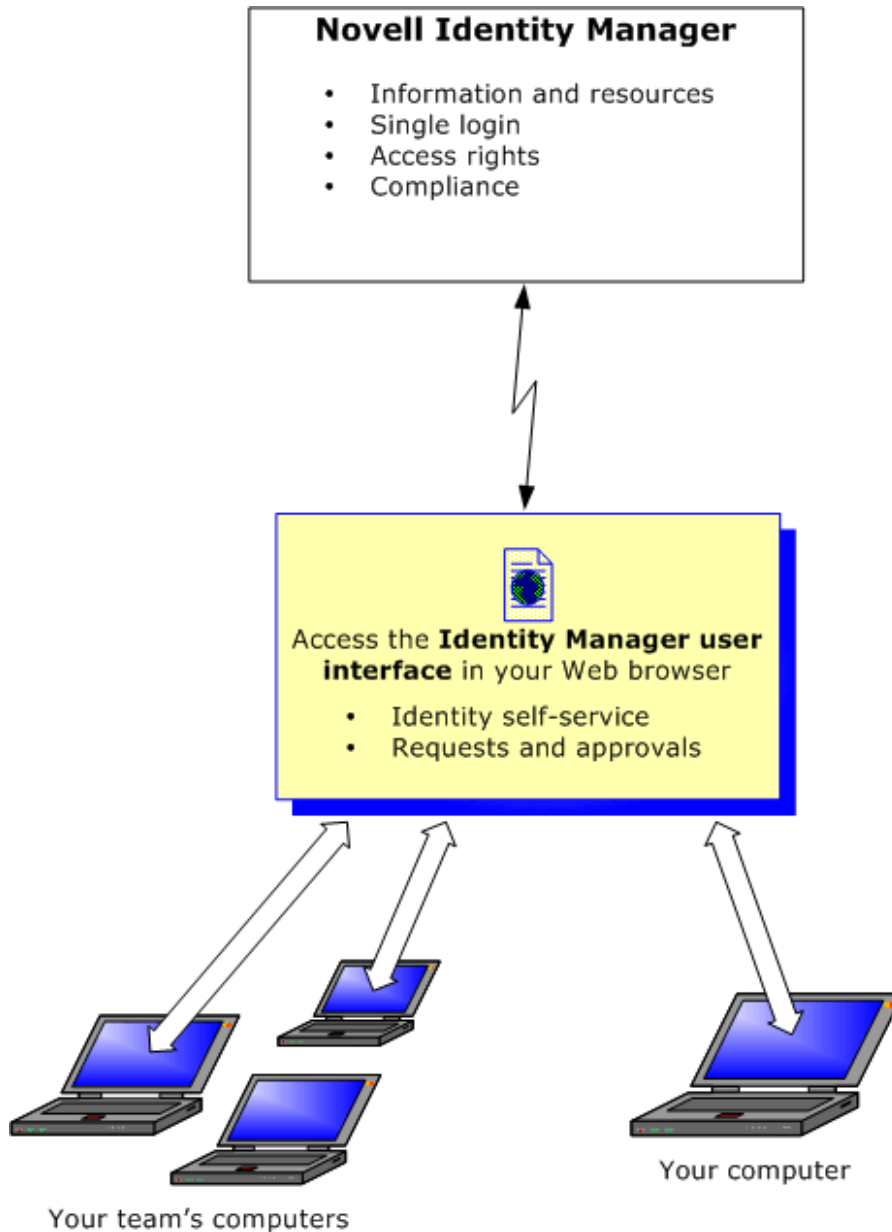
1.1.3 Typical uses

Here are some examples of how people typically use the Identity Manager user interface within an organization.

Working with identity self-service

- Ella (an end-user) recovers her **forgotten password** through the identity self-service features when logging in.

- Erik (an end-user) performs a **search** for all employees at his location who speak German.

- Eduardo (an end-user) browses the **organization chart**, finds Ella, and clicks the e-mail icon to send a message to her.

Working with requests and approvals

- Ernie (an end-user) browses a list of **resources** available to him, and requests access to the Siebel system.

- Amy (an approver) receives **notification** of an approval request via e-mail (which contains an URL). She clicks the link, is presented with an **approval form**, and approves it.

- Ernie checks on the **status** of his previous request for Siebel access (which has now gone to a second person for approval). He sees that it is still in progress.

- Amy is going on vacation, so she indicates that she is temporarily **unavailable**; no new approval tasks will be assigned to her.

- Amy opens her approval task list, sees that there are too many for her to respond to in a timely manner, and so **reassigns** several to co-workers.

- Pat (an administrative assistant, acting as a **proxy** user for Amy) opens Amy's task list and performs an approval task for her.

- Max (a manager) views the **task lists of people in his department**. He knows that Amy is on vacation, so he reassigns tasks to others in his department.

- Max initiates a **request** for a database account **for someone in his department who reports directly to him**.

- Max assigns Dan to be an authorized **delegate** for Amy.

- Dan (now a delegated approver) receives **Amy's tasks** when she is unavailable.

- Max engages an unpaid intern, who should not be entered into the HR system. The system administrator **creates the user record** for this intern and requests that he be given access to Notes, Active Directory, and Oracle.

1.2 Accessing the Identity Manager user interface

When you're ready to start using the Identity Manager user interface, all you need on your computer is a **Web browser**. Identity Manager supports the most popular browser versions; see your system administrator for a list of supported browsers or for help installing one.

Because it works in a browser, the Identity Manager user interface is as easy to access as any **Web page**.

NOTE: To use the Identity Manager user interface, make sure your Web browser has **JavaScript enabled**.

To access the Identity Manager user interface:

• In your Web browser, go to the **address (URL)** for the Identity Manager user interface (as supplied by your system administrator). For example:

```
http://myappserver:8080/IDM
```

By default, this takes you to the **guest welcome page** of the user interface:
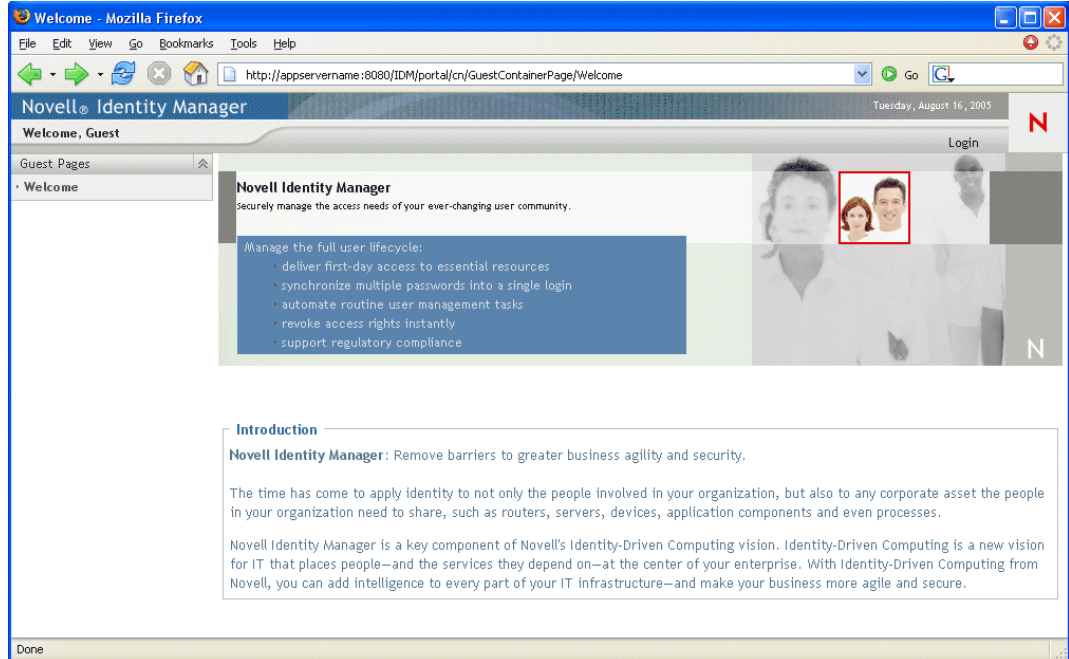
From here, you can log in to the user interface to get access to its features.

1.2.1 Your user interface may look different

If you see a different first page when accessing the Identity Manager user interface, it's typically because the application has been **customized for your organization**. As you work, you may find that other features of the user interface have been customized too.

In this case, you should **check with your system administrator** to learn how your customized user interface differs from the default configuration described in this book.

1.3 Logging in

You must be an authorized user to log in to the Identity Manager user interface from the guest welcome page. If you need help getting a **username and password** to supply for the login, see your system administrator.

To log in to the Identity Manager user interface:

1 From the guest welcome page, click the **Login** link (in the top-right corner of the page).

The user interface prompts you for a username and password:
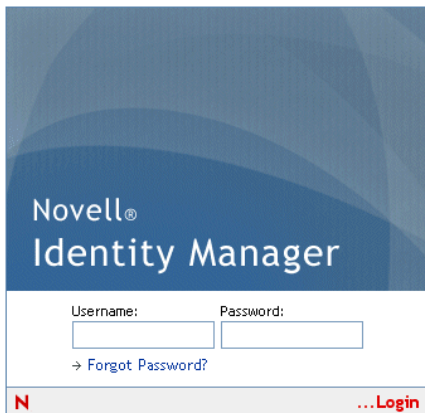
2 Enter your username and password, then click **Login**.

1.3.1 If you forget your password

If you can't remember the password to type, you may be able to use the **Forgot Password** link for assistance. When you are prompted to log in, this link appears on the screen by default. You can take advantage of it if your system administrator has set up an appropriate **password policy** for you.

To use the Forgot Password feature:

1 When you're prompted to log in, click the **Forgot Password** link.

You are then asked for your username:
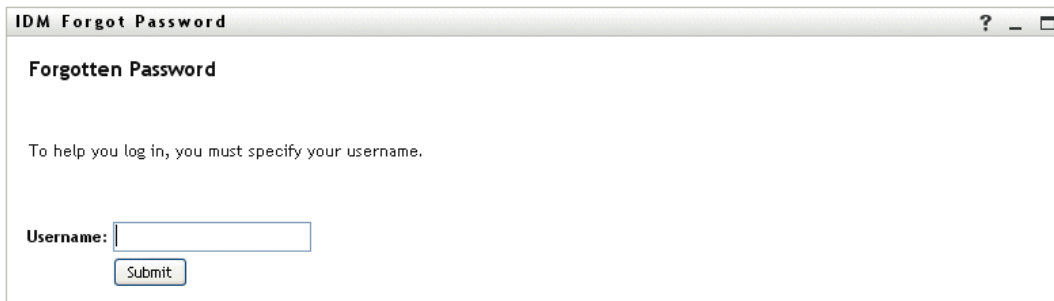
2 Type your **username** and click **Submit**.

NOTE: If Identity Manager can't find a password policy for you, you'll get an **error message** now. See your system administrator for assistance.

3 Answer any **challenge questions** that display and click **Submit**. For example:

If you successfully answer the challenge questions, you'll get some **assistance** with your password. The nature of that assistance depends on how the system administrator has set up your password policy. For example, you might:

- **See a hint** about your password displayed on the screen
- **Receive an e-mail** containing your password or a hint about it
- **Be prompted to reset** your password (in other words, specify a new password)

1.3.2 If you have trouble logging in

If you are unable to log in to the Identity Manager user interface, make sure that you're using the right username and typing the password correctly (spelling, uppercase or lowercase letters, etc.). If you still have trouble, consult your system administrator. It's helpful if you can **provide details** about the problem you are having (such as error messages).

1.3.3 If you're prompted for additional information

It's possible that you might be prompted for other kinds of information as soon as you log in to the Identity Manager user interface. It all depends on how the system administrator has set up your password policy (if any). For example:

- **If this is your first login**, you might be prompted to define your challenge questions and responses, or your password hint
- **If your password has expired**, you might be prompted to reset it

1.4 Exploring the user interface

When you have successfully logged in, the Identity Manager user interface displays the **tab pages** where you'll do your work:
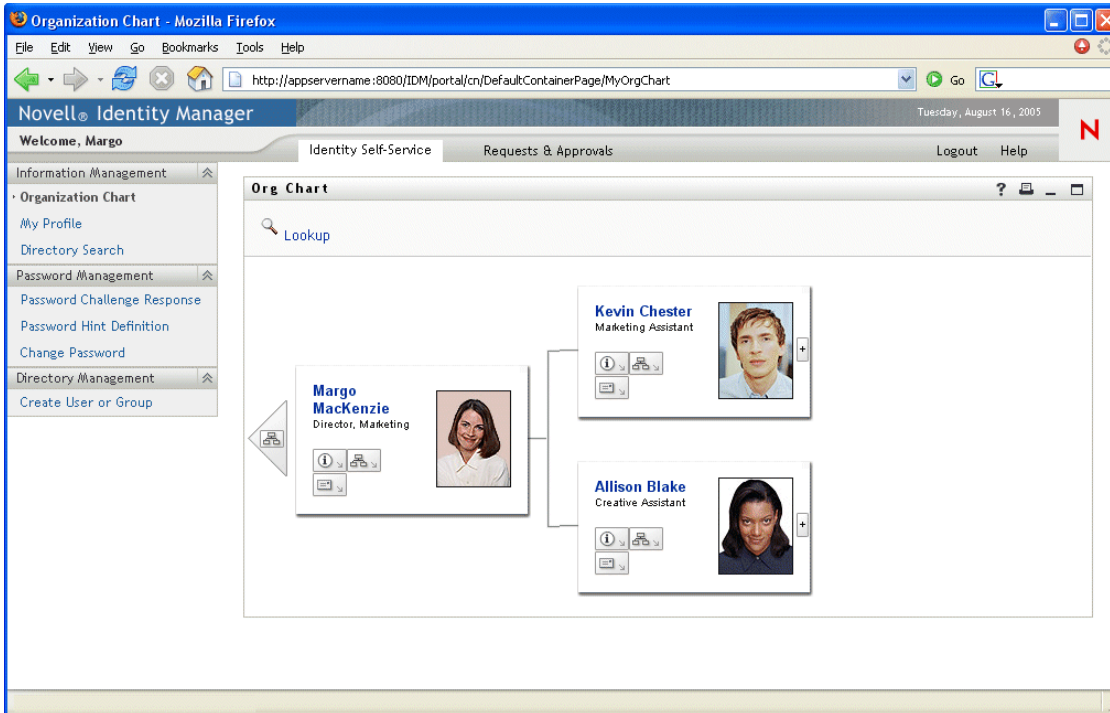
If you look along the top of the user interface, you'll see the **two main tabs**:

- **Identity Self-Service** (which is open by default)

  To learn about this tab and how to work with it, see .

- **Requests & Approvals**

  To learn about this tab and how to work with it, see .

  NOTE: To enable the Requests & Approvals tab, your organization must have the Provisioning Module for Identity Manager.

To switch to a different tab:

- Simply **click the tab** you want to use.

1.4.1 Getting help

While working in the Identity Manager user interface, you can display **online help** to get documentation about the tab that you're currently using.

To get help about the Identity Manager user interface:

1 Go to the **tab** that you want to learn about (such as Identity Self-Service or Requests & Approvals).

2 Click the **Help** link (in the top-right corner of the page).

  The help page for the current tab displays.

1.4.2 Logging out

When you're finished working in the Identity Manager user interface and want to **end your session**, you can log out.

To log out of your Identity Manager user interface session:

- Click the **Logout** link (in the top-right corner of the page).

By default, the user interface displays its **login prompt** (in case you want to log in again later).

1.5 What to do next

Now that you've learned the basics of the Identity Manager user interface, you can start using the tabs it provides to get your work done.

To learn about	See
Doing identity self-service work	Part II, "Using the Identity Self-Service Tab," on page 21
Doing request and approval work	Part III, "Using the Requests & Approvals Tab," on page 93

Using the Identity Self-Service Tab

II

These chapters tell you how to use the Identity Self-Service tab of the Identity Manager user interface to display and work with identity information.

Introducing the Identity Self-Service Tab

2

This chapter tells you how to begin using the Identity Self-Service tab of the Identity Manager user interface. Topics include:

For more general information about accessing and working with the Identity Manager user interface, see Chapter 1, "Getting Started," on page 13.

2.1 About the Identity Self-Service tab

The purpose of the Identity Self-Service tab is to give you a convenient way to **display and work with identity information yourself**. It enables your organization to be more responsive by giving you access to the information you need whenever you need it. For example, you might use the Identity Self-Service tab to:

- **Manage** your own user account directly
- **Look up** other users and groups in the organization on demand
- **Visualize** how those users and groups are related

Your **system administrator is responsible for setting up** the contents of the Identity Self-Service tab for you and the others in your organization. What you can see and do is typically determined by your job requirements and your level of authority.

2.2 Accessing the Identity Self-Service tab

By default, after you have logged in to the Identity Manager user interface, the Identity Self-Service tab opens and displays its **Organization Chart** page:
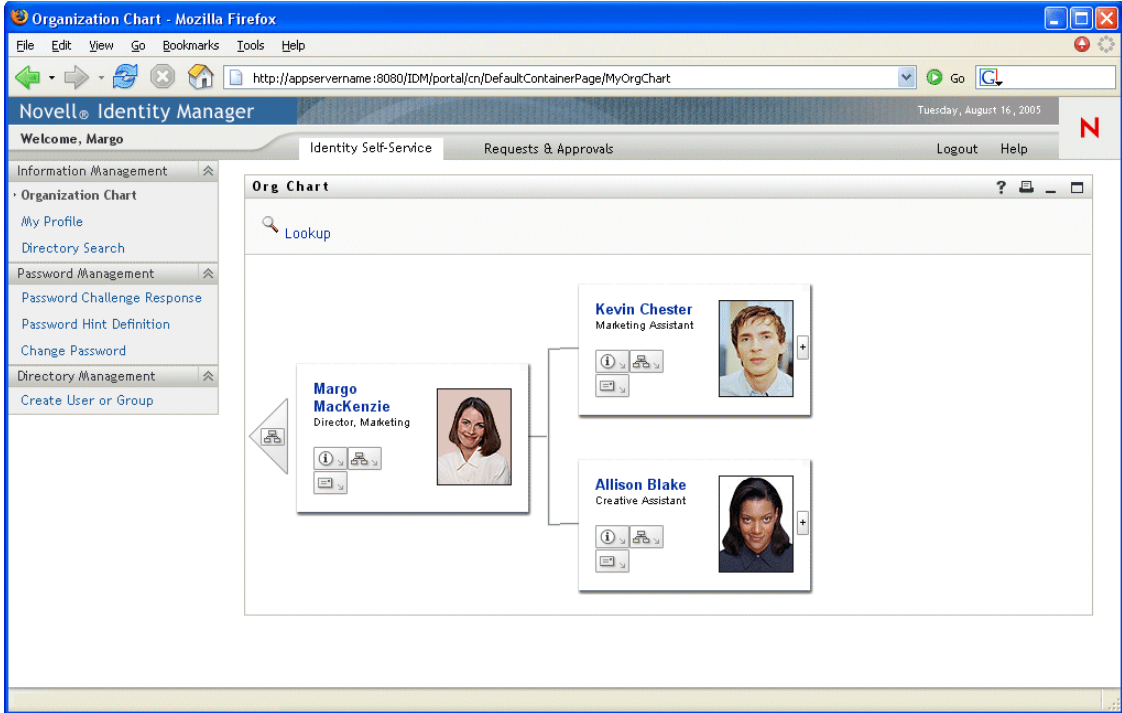
If you go to another tab in the Identity Manager user interface but then want to return, you just need to **click the Identity Self-Service tab** to open it again.

2.3 Exploring the tab's features

This section describes the **default features** of the Identity Self-Service tab. (Note that your tab may look different due to customizations made for your organization; consult your system administrator.)

The left side of the Identity Self-Service tab displays a **menu of actions** you can perform. The actions are listed by **category** — Information Management, Password Management, and Directory Management (if authorized):
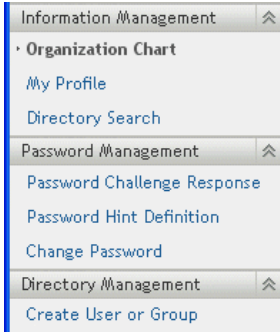
When you **click an action**, it displays a corresponding **page** on the right. The page typically contains a special window called a **portlet**, which shows the details for that action. For example, the portlet on the Organization Chart page looks like this:
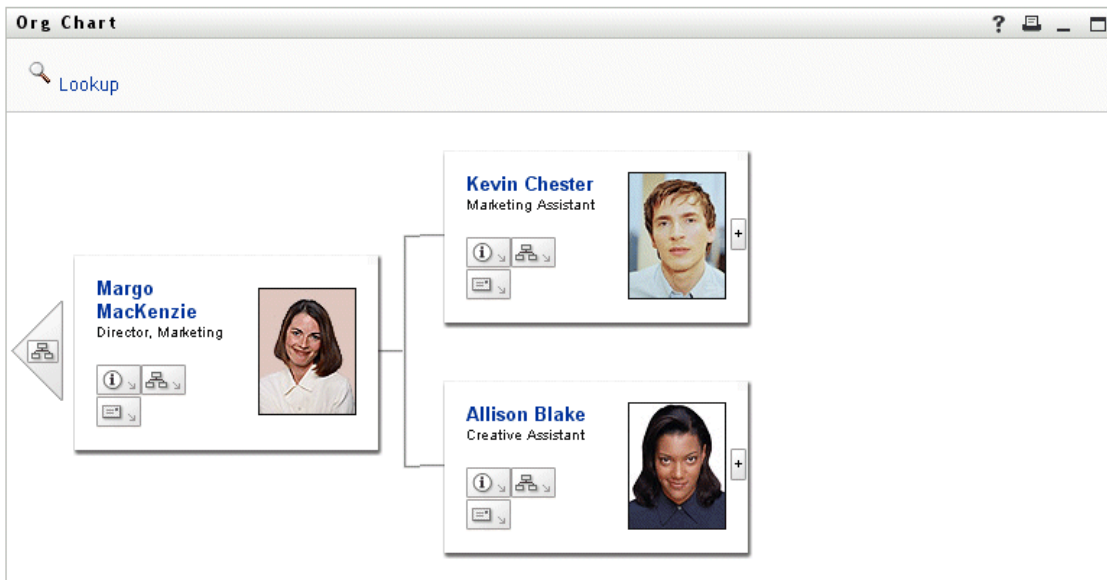
The **portlet title bar** typically displays a set of **buttons** you can click to perform standard operations. For example:

Here's what these buttons do:

Button	What it does
?	Displays help for the portlet
🖳	Prints the contents of the portlet
—	Minimizes the portlet
▢	Maximizes the portlet

If you see other buttons and aren't sure what they do, you can **hover your mouse pointer over them** to display descriptions.

2.4 Identity Self-Service actions you can perform

Here's a summary of the actions that are available to you by default on the Identity Self-Service tab:

Category	Action	Description
Information Management	Organization Chart	Displays the relationships among users and groups in the form of an interactive organizational chart
		For details, see Chapter 3, "Using Organization Chart," on page 27.
	My Profile	Displays the details for your user account and lets you work with that information
		For details, see Chapter 4, "Using My Profile," on page 37.
	Directory Search	Lets you search for users or groups by entering search criteria or by using previously-saved search criteria
		For details, see Chapter 5, "Using Directory Search," on page 55.
Password Management	Password Challenge Response	Lets you set/change your valid responses to administrator-defined challenge questions, and set/change user-defined challenge questions and responses
		For details, see Chapter 6, "Performing Password Management," on page 75.
	Password Hint Definition	Lets you set/change your password hint
		For details, see Chapter 6, "Performing Password Management," on page 75.
	Change Password	Lets you change (reset) your password, according to the rules established by your system administrator
		For details, see Chapter 6, "Performing Password Management," on page 75.
Directory Management	Create User or Group	Lets you create a new user or group (note that you must be authorized in order to see and use this feature; consult your system administrator)
		For details, see Chapter 7, "Creating Users or Groups," on page 81.

Using Organization Chart

3

This chapter tells you how to use the **Organization Chart** page on the **Identity Self-Service tab** of the Identity Manager user interface. Topics include:

NOTE: This chapter describes the **default features** of the Organization Chart page. Please be aware that **you may encounter some differences** due to your job role, your level of authority, and customizations made for your organization; **consult your system administrator** for details.

For more general information about accessing and working with the Identity Self-Service tab, see Chapter 2, "Introducing the Identity Self-Service Tab," on page 23.

3.1 About Organization Chart

You can use the Organization Chart page to display the **relationships among users and groups** in the form of an interactive organizational chart. In the chart, each user or group is represented graphically in a format that resembles a **business card**.

When you first display the Organization Chart page, it shows **your own manager-employee relationships**. For example, here's what Margo MacKenzie (Marketing Director) sees by default when she goes to the Organization Chart page:
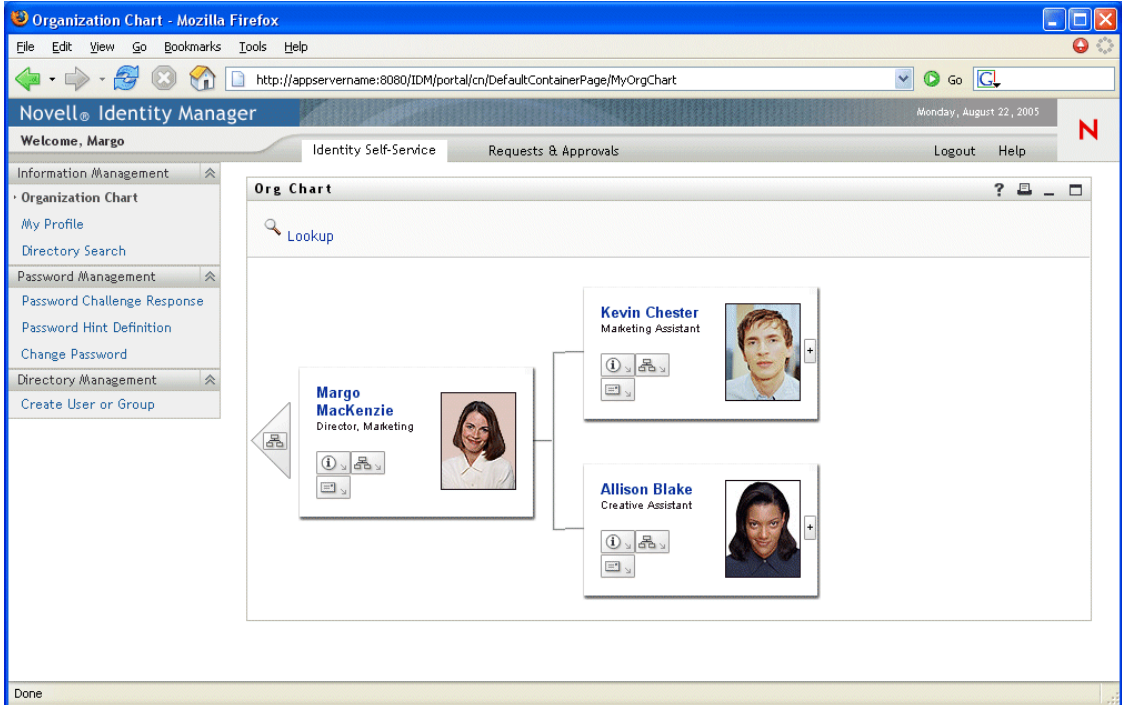
You can **navigate the chart** by expanding or collapsing it, level by level. Here's what Margo MacKenzie sees when she navigates up two levels and expands the chart:
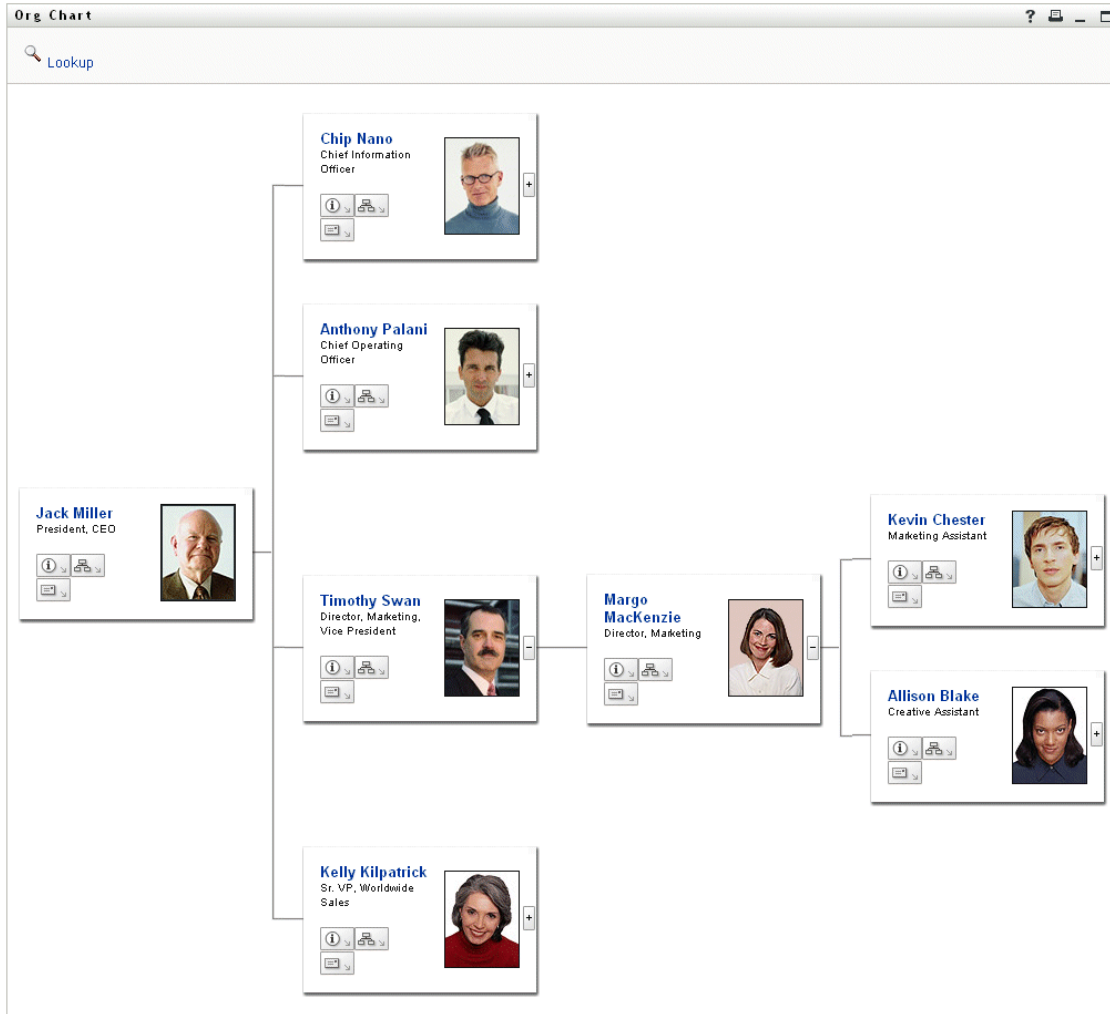
The chart also enables you to **view other relationships**. For example, the **user-group relationships** for Timothy Swan (Marketing Vice President) look like this:
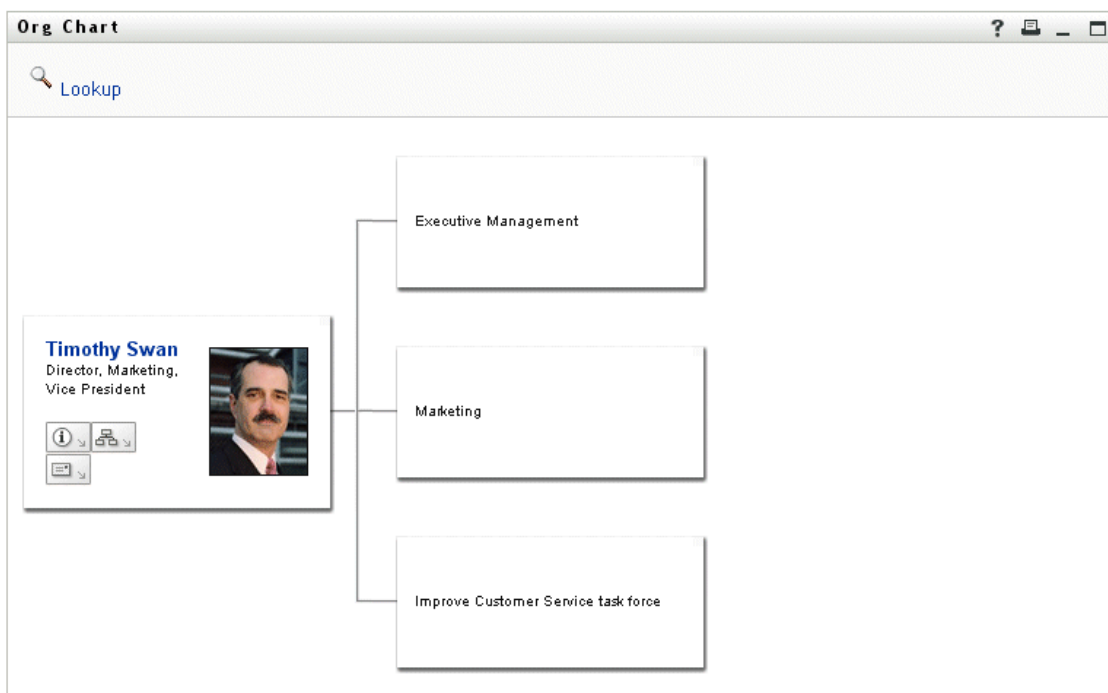
The chart provides **links for performing other useful actions** on users and groups. You can:

- **Look up a user** to display in the chart
- **Display details** (Profile page) for a selected user
- **Send user details** (in the form of a link) to someone via e-mail
- **Send new e-mail** to a selected user or to a manager's team

3.2 Navigating the chart

This section describes how to navigate by:

- Expanding the chart
- Collapsing the chart
- Going up one level in the chart
- Reorienting the chart to another user
- Looking up a user in the chart

To expand the chart:

1 **Find a card** that you want to expand.

2 **Click this icon** at the right edge of that card:

The chart **expands to the right** to show the next level of subsidiary cards (if any) that are related to your chosen card.

To collapse the chart:

1 **Find a card** that you want to collapse.

2 **Click this icon** at the right edge of that card:

| − |

The chart **collapses from the right** to hide the subsidiary cards that are related to your chosen card.

To go up one level in the chart:

1 **Find a card** from which you want to go up to the next level.

2 **Click this icon** to the left of that card (if available):

Your position in the chart **moves left** to show the card that's one level up from your chosen card.

To reorient the chart to another user:

1 **Find the card of a user** to which you want the chart reoriented.

2 **Click the user's name** (which is a link) on that card.

Your position in the chart shifts to the chosen card.

To look up a user in the chart:

1 Click the **Lookup** link at the top-left corner of the chart.

The Lookup page displays:
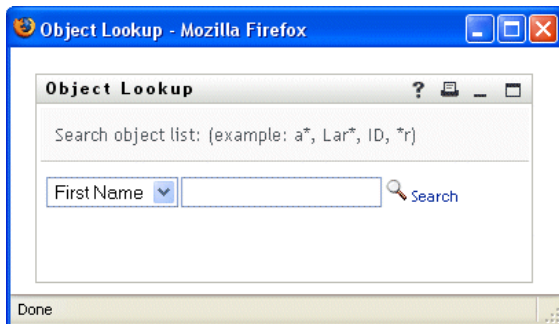
2 Specify **search criteria** for the user you want:

2a Use the dropdown list to choose whether the search is by **First Name** or **Last Name**.

2b In the textbox next to the dropdown, type **all or part of the name** to search for.

The search will find every name that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

For instance, all of the following examples will find the first name Chip:

```
Chip
```

```
chip

c

c*

*p

*h*
```

3 Click **Search**.

The Lookup page displays your **search results**:
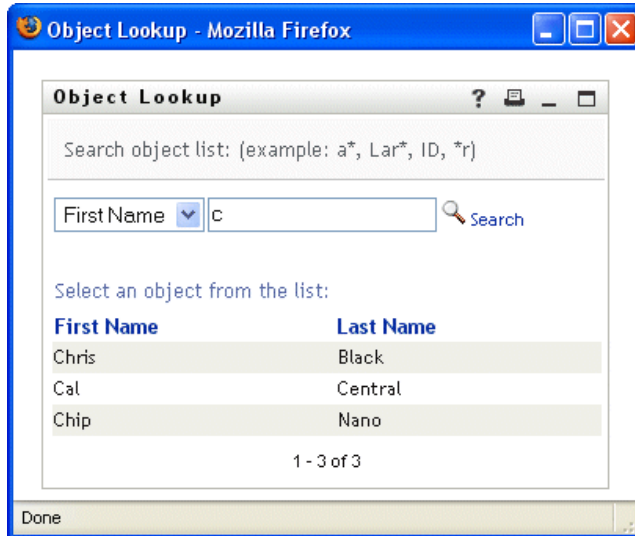
If you see a **list of users** that includes the one you want, go to . Otherwise, go back to .

TIP: You can **sort** the search results in ascending or descending order by clicking the column headings.

---

4 **Select** the user you want from the list.

The Lookup page closes and **takes you to that user** in the chart.

3.3 Switching the chart

You can switch the chart that you're viewing to display other relationships.

To switch to another type of chart:

1 **Find the card of a user** for whom you want to display other relationships.

2 **Click this icon** on that card:

A popup menu displays.

3 **Select** one of the following choices:

Type of chart	Description
User groups OrgChart	Shows users and the groups in which they participate
Manager-Employee OrgChart	Shows the reporting structure of managers and subordinates

The display **switches to your chart selection** and shows the corresponding relationships for your chosen user.

3.4 Displaying detailed information

You can display details (the Profile page) for a selected user in the chart.

To display detailed information about a user in the chart:

1 **Find the card of a user** whose details you want to display.

2 **Click this icon** on that card:

A popup menu displays.

3 Select **Show Info**.

The Profile page displays, showing detailed information about your chosen user:
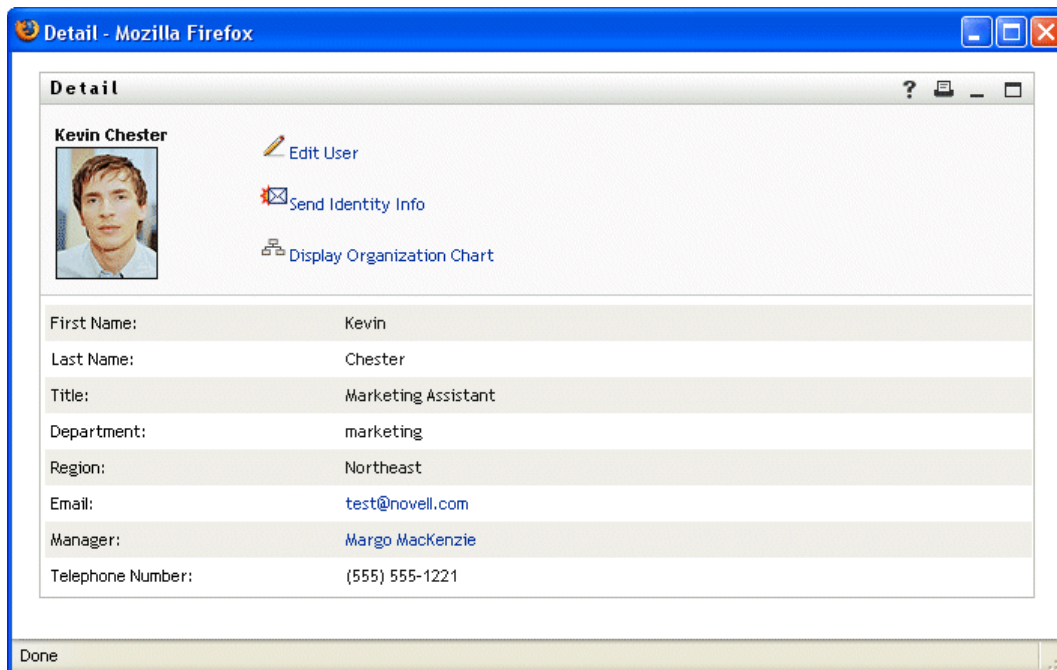
This page is just like the **My Profile** page on the Identity Self-Service tab. The only difference is that, when you are viewing details about another user (instead of yourself), **you may not be authorized** to see some of the data or perform some of the actions on the page. Consult your system administrator for assistance.

To learn about using the features of the Profile page, see .

4 When you're done with the Profile page, you can **close its window**.

3.5 Sending e-mail via the chart

This section describes how to:

- E-mail detailed information about a user in the chart
- Send new e-mail to a user in the chart
- Send new e-mail to a manager's team

To e-mail detailed information about a user in the chart:

1 **Find the card of a user** whose details you want to e-mail to someone.

2 **Click this icon** on that card:

A popup menu displays.

3 Select **Email Info**.

A **new message** is created in your **default e-mail client**. The following parts of the message are **already filled in** for you:

This part of the message	Contains
Subject	The text: `Identity Information for user-name`
Body	A **link** (URL) to the Profile page that displays detailed information about your chosen user. Note that this link will prompt the recipient to **log in** to the Identity Manager user interface before it displays any information. The recipient must have appropriate **authority** to view or edit the data. To learn about using the features of the Profile page, see Chapter 4, "Using My Profile," on page 37.

For example:

4 Specify the **recipients** of the message (and any additional content that you want).

5 **Send** the message.

To send new e-mail to a user in the chart:

1 **Find the card of a user** to whom you want to send e-mail.

2 **Click this icon** on that card:

A popup menu displays.

3 Select **New Email**.

A **new message** is created in your **default e-mail client**. The message is blank except for the **To** list, which specifies your chosen user as a recipient.

4 Fill in the message **contents**.

5 **Send** the message.

To send new e-mail to a manager's team:

1 **Find the card of a user** who manages a team to whom you want to send e-mail.

2 **Click this icon** on that card:
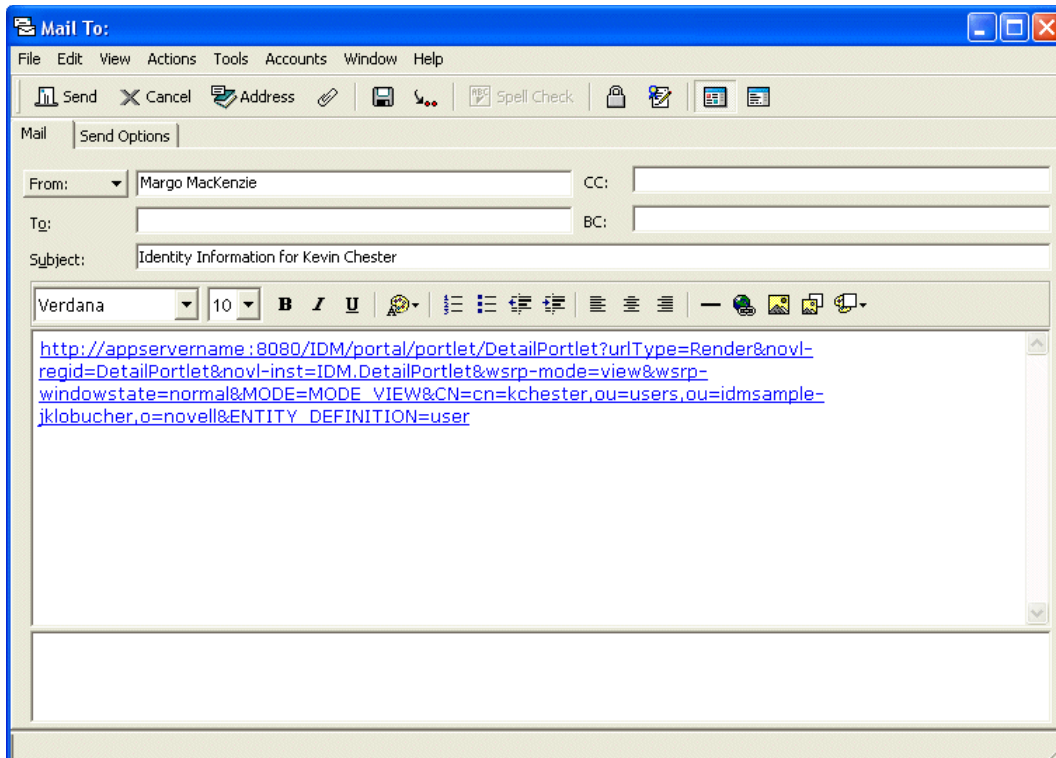

A popup menu displays.

3 Select **Email to team**.

A **new message** is created in your **default e-mail client**. The message is blank except for the **To** list, which specifies **each immediate subordinate** of your chosen user (manager) as a recipient.

4 Fill in the message **contents**.

5 **Send** the message.

Using My Profile

4

This chapter tells you how to use the **My Profile** page on the **Identity Self-Service tab** of the Identity Manager user interface. Topics include:

NOTE: This chapter describes the **default features** of the My Profile page. Please be aware that **you may encounter some differences** due to your job role, your level of authority, and customizations made for your organization; **consult your system administrator** for details.

For more general information about accessing and working with the Identity Self-Service tab, see Chapter 2, "Introducing the Identity Self-Service Tab," on page 23.

4.1 About My Profile

You can use the My Profile page to display the **details for your user account** and to work with that information, as needed. For example, here's what Margo MacKenzie (Marketing Director) sees by default when she goes to the My Profile page:
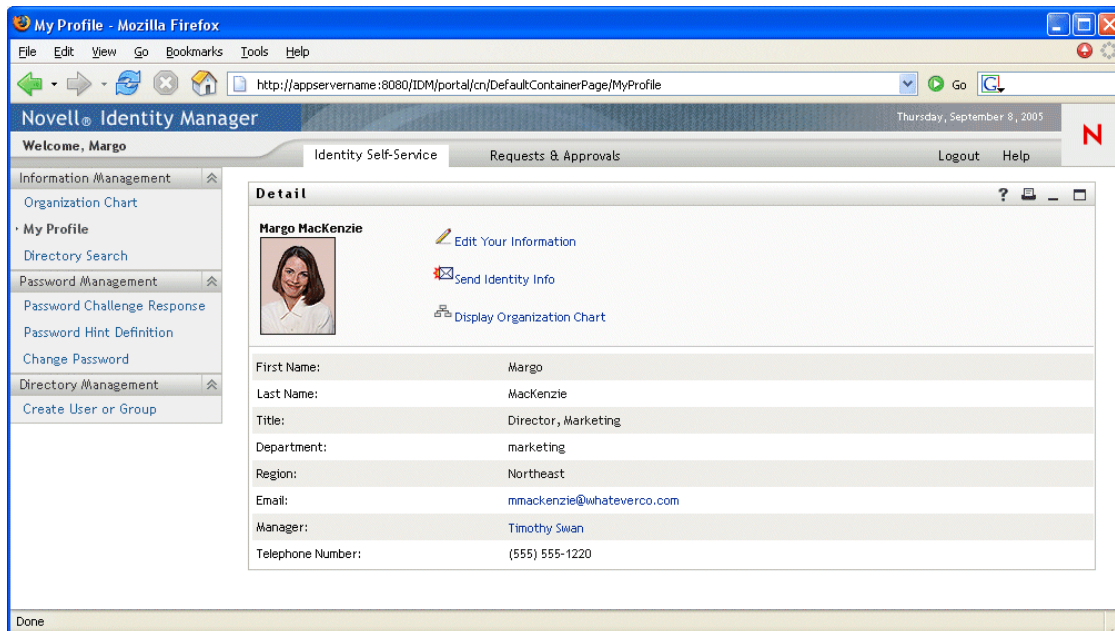
If you want to change some of these details, you can **edit your information** (although it's up to the system administrator to determine exactly what you are authorized to edit). For instance, Margo

MacKenzie has authority to make a variety of changes when she edits her information. Here's what she sees:

Back on the main (viewing) page, My Profile provides **links for performing other useful actions** on your information. You can:

- **Send your details** (in the form of a link) to someone via e-mail
- **Switch to your organization chart** instead of your details
- **Click the name** of another user, group, or task group to display its details
- **Click an e-mail address** to send a message to that account

4.2 Editing your information

My Profile provides an **editing page** that you can switch to when you want to make changes.

Note that **some values may not be editable** (maybe even all of them). These values appear on the editing page as read-only text or as links. If you have questions about what you're authorized to edit, consult your system administrator.

To edit your information:

1 Click the **Edit Your Information** link at the top of the My Profile page.

2 When the editing page displays, **make your changes** as needed.

   While making changes, you need to know about the following topics (discussed later in this section):

   - Section 4.2.1, "Hiding information," on page 39
   - Section 4.2.2, "Using the editing buttons," on page 39
   - Section 4.2.3, "Editing an image," on page 44

3 When you're done editing, click **Save Changes**, then **Return**.

4.2.1 Hiding information

Hiding a piece of your information hides it from everyone using the Identity Manager user interface, except you and the system administrator.

To hide a piece of information:

1 On the editing page, **find an item** that you want to hide.

2 Select the **Hide** check box to the left of that item.

   NOTE: The Hide check box may be **disabled** for some items so you can't select it. It's up to the system administrator to enable this feature for specific items.

4.2.2 Using the editing buttons

The editing page provides several buttons you can use while making changes:

Button	What it does
	Looks up a value to use in an entry
	Displays a History list of values used in an entry
	Displays a Calendar to pick a time to use in an entry (in date-time or date-only format)
	Resets the value of an entry
	Adds a new entry

Button	What it does
✖	Deletes an existing entry and its value
✎	Lets you edit (specify and display) an image

The following procedures tell you more about using some of these editing buttons.

To look up a user:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a user):

🔍

The Lookup page displays:

2 Specify **search criteria** for the user you want:

2a Use the dropdown list to choose whether the search is by **First Name** or **Last Name**.

2b In the textbox next to the dropdown, type **all or part of the name** to search for.

The search will find every name that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

For instance, all of the following examples will find the first name Chip:

```
Chip
chip
c
c*
*p
*h*
```

NOTE: A manager lookup will search only for users who are managers. A task-manager lookup will search only for users who are task managers.

3 Click **Search**.

The Lookup page displays your **search results**:

If you see a **list of users** that includes the one you want, go to . Otherwise, go back to .

TIP: You can **sort** the search results in ascending or descending order by clicking the column headings.

---

4 **Select** the user you want from the list.

The Lookup page closes and **inserts the name of that user** into the appropriate entry on the editing page.

To look up a group or task group:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a group or task group):

The Lookup page displays:

2 Specify **search criteria** for the group or task group you want:

   2a In the dropdown list, your only choice is to search by **Description**.

   2b In the textbox next to the dropdown, type **all or part of the description** to search for.

     The search will find every description that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

     For instance, all of the following examples will find the description Marketing:

```
Marketing
marketing
m
m*
*g
*k*
```

     NOTE: A group lookup will search for groups and task groups. But a task-group lookup will search only for task groups.

3 Click **Search**.

   The Lookup page displays your **search results**:

If you see a **list of groups or task groups** that includes the one you want, go to Step 4. Otherwise, go back to Step 2.

TIP: You can **sort** the search results in ascending or descending order by clicking the column heading.

---

4 **Select** the group or task group you want from the list.

The Lookup page closes and **inserts the description of that group or task group** into the appropriate entry on the editing page.

To use the History list:

1 Click the **History** button to the right of an entry (whose previous values you want to see):

The History list displays, with values in alphabetical order:

2 Do one of the following:

If you want to	Do this
Pick from the History list	**Select a value** that you want from the list. The History list closes and **inserts that value** into the appropriate entry on the editing page.
Clear the History list	Click **Clear History**. The History list closes and **flushes its values** for this entry. Clearing the History list does not change the current value of the entry on the editing page.

To use the Calendar:

1 Click the **Calendar** button to the right of an entry (for which you want to pick a time):

The Calendar displays:

2 To specify a **year, month, and day**:

   2a At the top of the Calendar, use the << and >> buttons to scroll to the year and month you want.

   2b **Select** the day you want in that month.

3 To specify an **hour and minute**:

   3a At the bottom of the Calendar, use the << and >> buttons to scroll to the hour you want.

   3b Use the < and > buttons to scroll to the minute you want.

   3c Click **OK**.

   The Calendar closes and **inserts the specified time** into the appropriate entry on the editing page.

4.2.3 Editing an image

Editing your information may involve adding, replacing, or displaying an image.

To add, replace, or display an image:

1 On the editing page, find an item that has a button labeled **add image** or **edit or view image**:

2 Click that button to display the **File Upload** page:
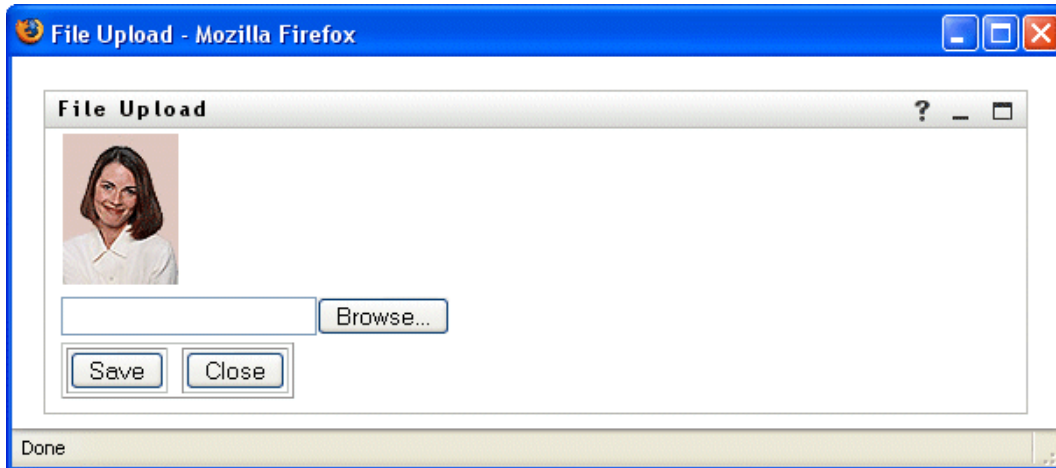
If this item already has an image, that image displays here (as shown above).

3 To **add** an image or to **replace** the current one:

   3a Click **Browse** and select an appropriate **image file** (such as a GIF or JPG).

   3b Click **Save** to upload the selected image file to the server.

4 Click **Close** to return to the editing page.

4.3 Sending your information via e-mail

The My Profile page enables you to send your details (in the form of a **link**) to someone via e-mail.

To e-mail your information:

1 Click the **Send Identity Info** link at the top of the My Profile page.

A **new message** is created in your **default e-mail client**. The following parts of the message are **already filled in** for you:

This part of the message	Contains
Subject	The text: Identity Information for *your-user-id*
Body	A **link** (URL) to the Profile page that displays detailed information about you. Note that this link will prompt the recipient to **log in** to the Identity Manager user interface before it displays any information. The recipient must have appropriate **authority** to view or edit the data.

For example:
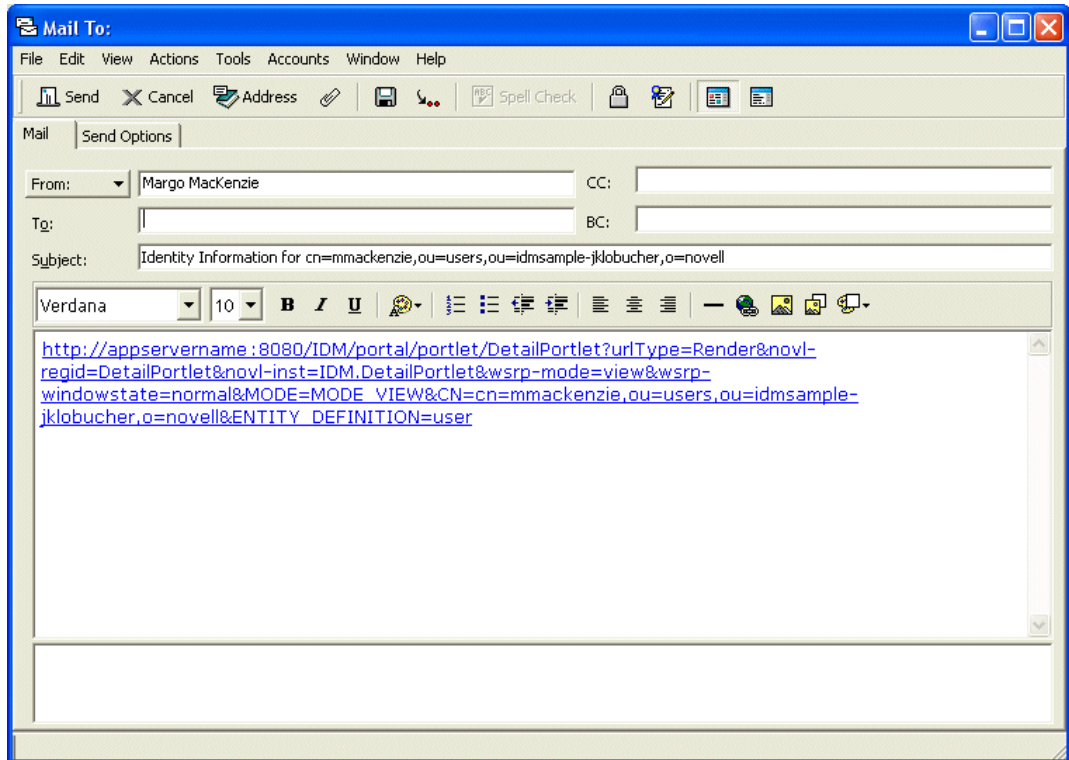
2 Specify the **recipients** of the message (and any additional content that you want).

3 **Send** the message.

4.4 Displaying your organization chart

It's easy to switch from the My Profile page to your organization chart.

To switch from My Profile to Organization Chart:

- Click the **Display Organization Chart** link at the top of the My Profile page.

    Your organization chart displays. For example:
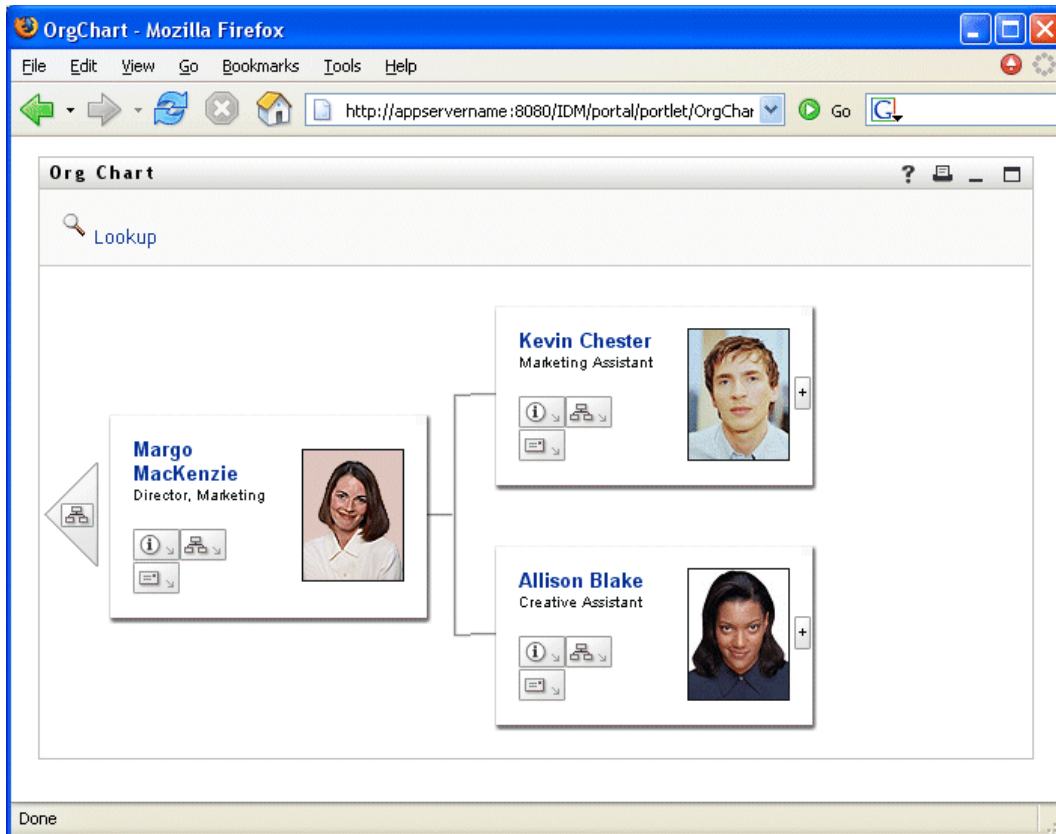
To learn about using the features of this page, see Chapter 3, "Using Organization Chart," on page 27.

4.5 Linking to other users, groups, or task groups

You can display the details (Profile page) for any other user, group, or task group that's listed as a **link** in your details.

To display detailed information about another user, group, or task group:

1 While viewing or editing information on the My Profile page, **look for links** that refer to the names of users, groups, or task groups.

2 **Click a link** to display the details for that user, group, or task group (in a separate window).

3 When you're done with that detail window, you can **close it**.

Here's a scenario that shows how someone might link to other user and group details. Timothy Swan (Vice President of Marketing) logs in to the Identity Manager user interface and goes to the **My Profile** page:
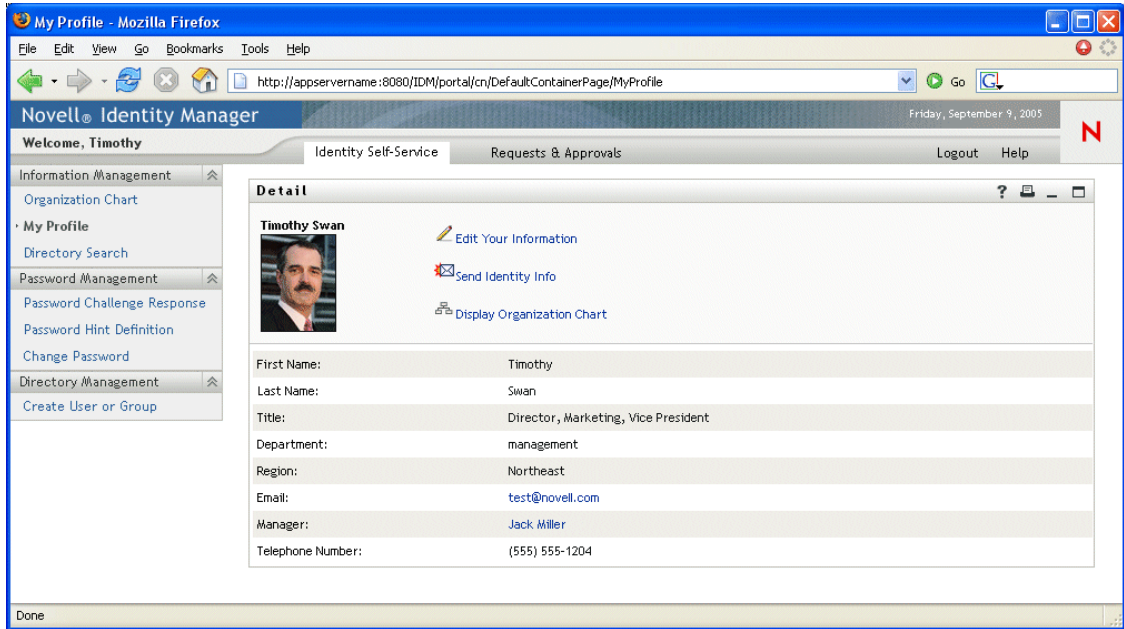
He clicks **Edit Your Information** and sees:

Detail ? 🖫 _ ▢

Edit User

* - indicates required.

This object is being displayed in 'view' mode only. Either this object is not editable or you do not have sufficient rights to modify it.

Hide	Attribute	Value
☐	First Name:	Timothy
☐	Last Name:	Swan
☐	Title:	Director, Marketing, Vice President
☐	Department:	management
☐	Region:	Northeast
☐	Email:	test@novell.com
☐	Manager:	Jack Miller
☐	Group:	Executive Management, Marketing
☐	Telephone Number:	(555) 555-1204
☐	Preferred Locale:	
☐	User Photo:	🔍 view
☐	Admin Manager:	⦿ true ○ false
☐	Direct Reports:	Margo MacKenzie
☐	Task Group Manager:	○ true ○ false
☐	Task Groups:	

Return

Timothy is not currently authorized to change these values, so they are presented for viewing instead of editing.

He notices user names (Jack Miller, Margo MacKenzie) and group names (Executive Management, Marketing) that appear as links. He clicks **Marketing** and sees a new window:
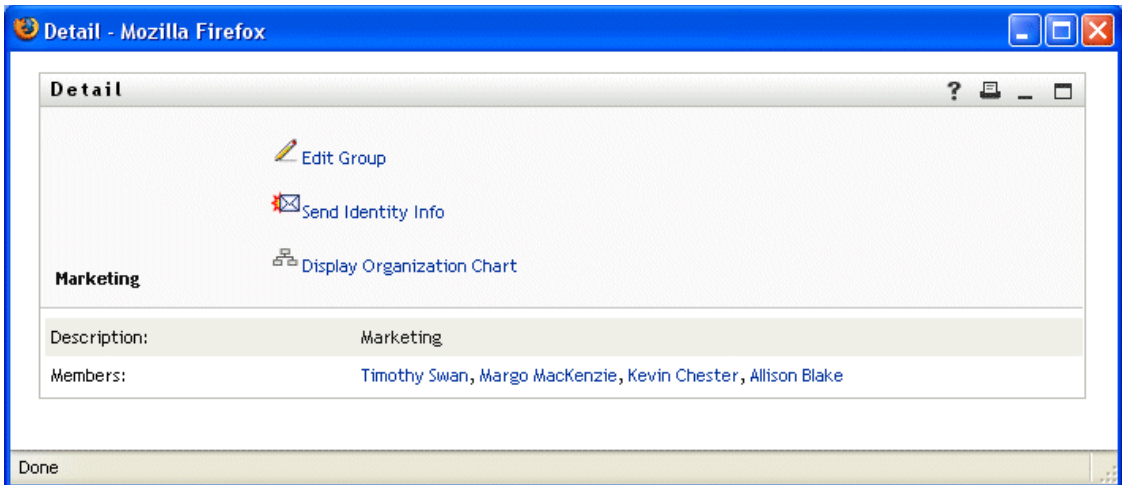
This is the detailed information about the Marketing group. He clicks **Edit Group** and sees:
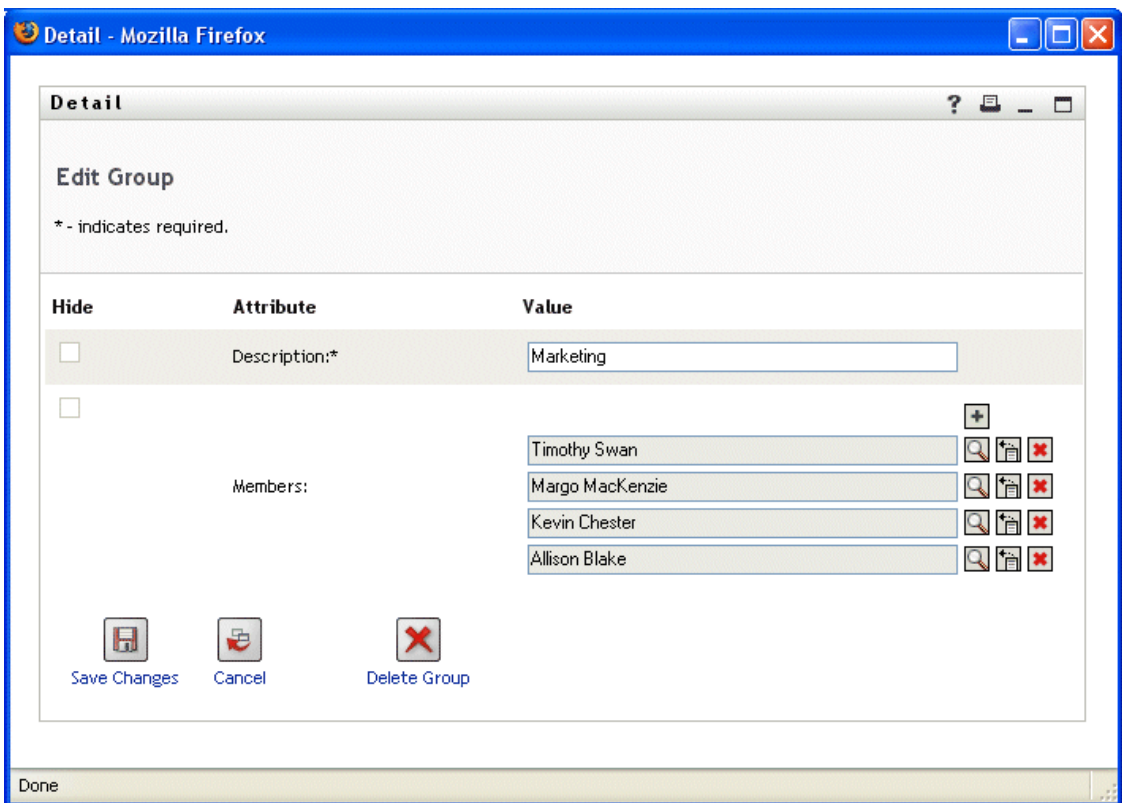
He notices that the system administrator has given him the ability to edit this group's details. There's even a **Delete Group** button, because the system administrator has given him delete permission for this group.

He opts not to make any changes and clicks **Cancel** to go back to the main page of Marketing group details:
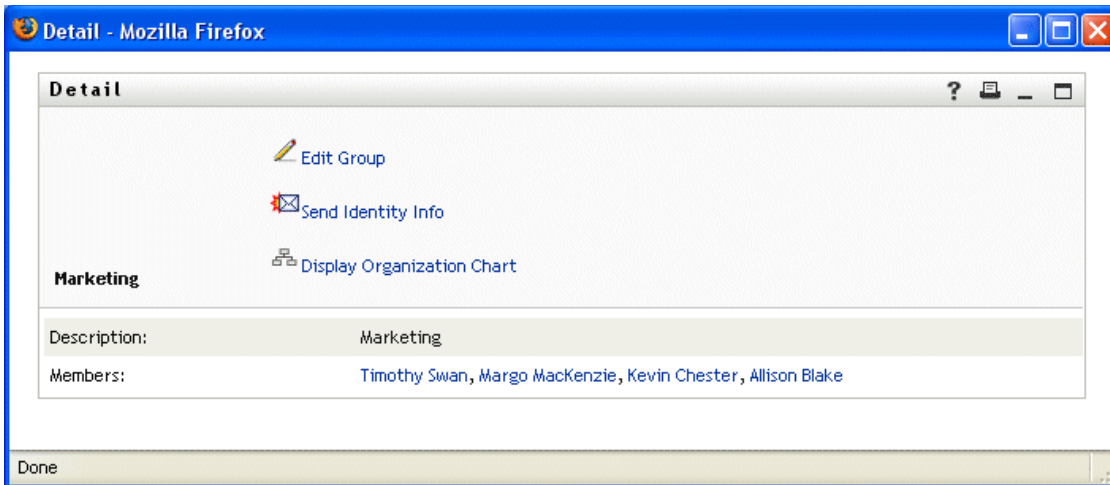
The names of the Marketing group's members are links too. He clicks **Allison Blake** and sees:
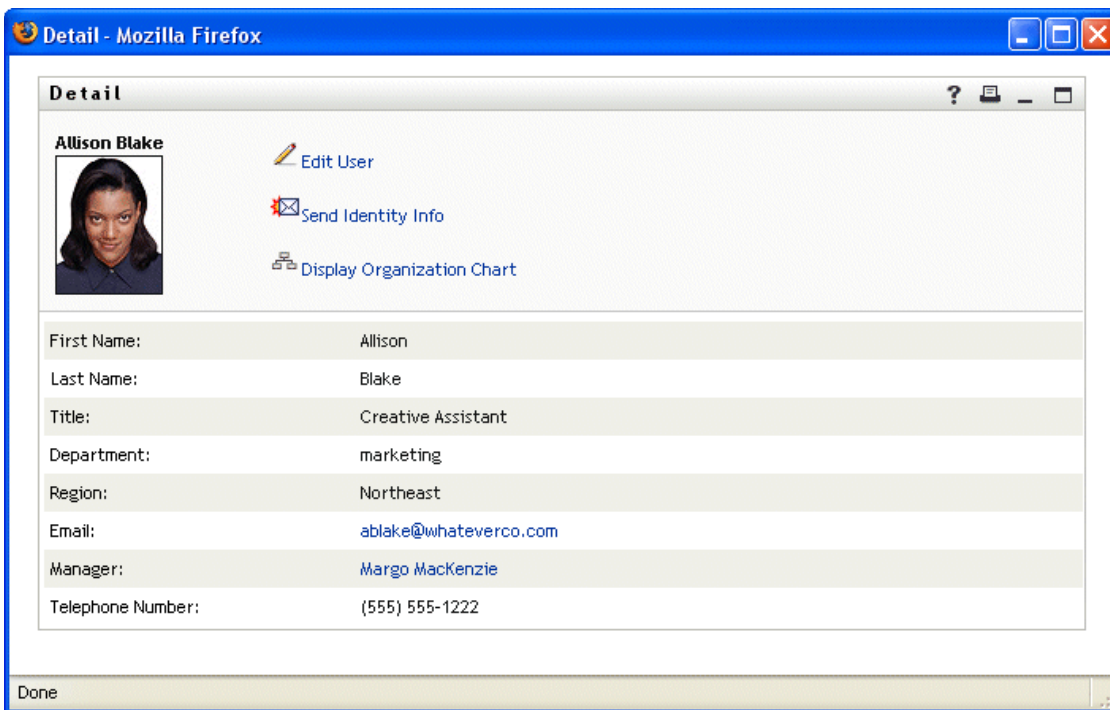
This is the detailed information about user Allison Blake (one of his employees). He clicks **Edit User** and sees:
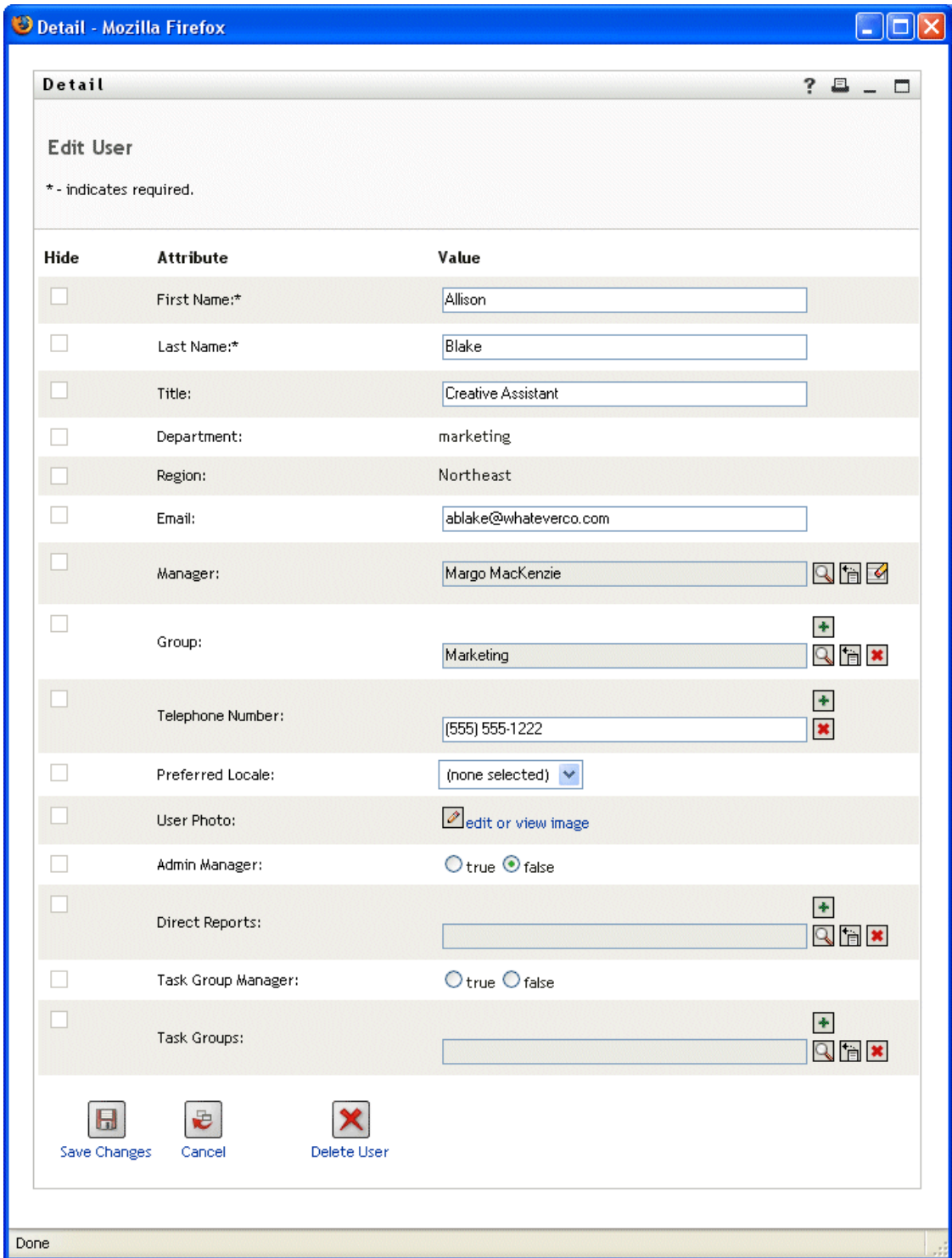
The system administrator has given him the ability to edit this user's details (except the Department and Region attributes), as well as the ability to delete this user. He opts not to make any changes and clicks **Cancel** to go back to the main page of details for Allison Blake:
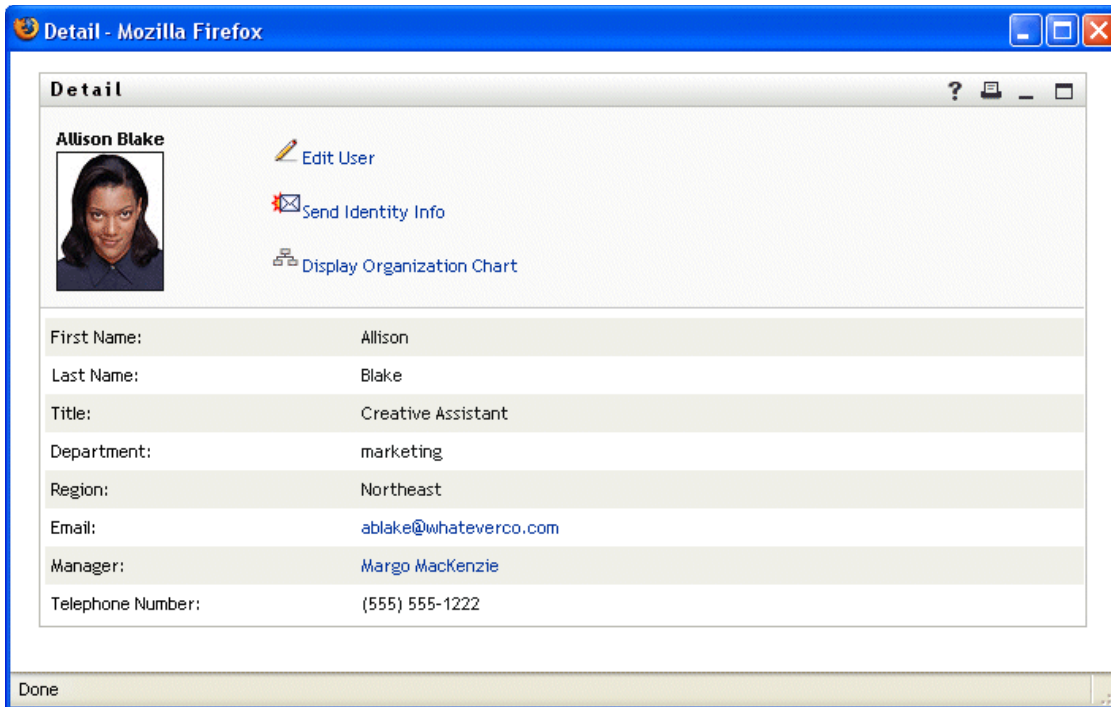
Allison's **e-mail address** is also a link. When he clicks it, his e-mail client creates a new message to her:
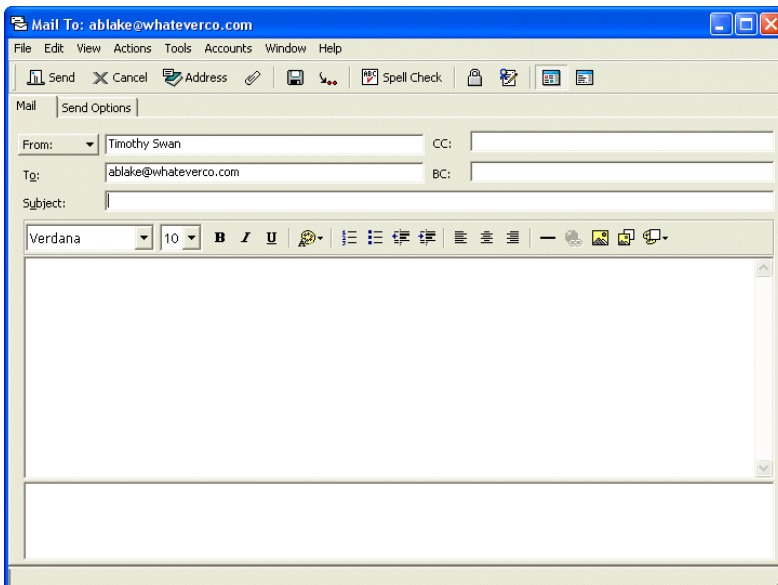
He can now type the message contents and send it.

Using Directory Search

<div style="text-align: right">5</div>

This chapter tells you how to use the **Directory Search** page on the **Identity Self-Service tab** of the Identity Manager user interface. Topics include:

NOTE: This chapter describes the **default features** of the Directory Search page. Please be aware that **you may encounter some differences** due to your job role, your level of authority, and customizations made for your organization; **consult your system administrator** for details.

For more general information about accessing and working with the Identity Self-Service tab, see Chapter 2, "Introducing the Identity Self-Service Tab," on page 23.

5.1 About Directory Search

You can use the Directory Search page to **search for users, groups, or task groups** by entering search **criteria** or by using previously-saved search criteria.

For example, suppose Margo MacKenzie (Marketing Director) needs to search for information about someone in her organization. She goes to the Directory Search page and sees this by default:
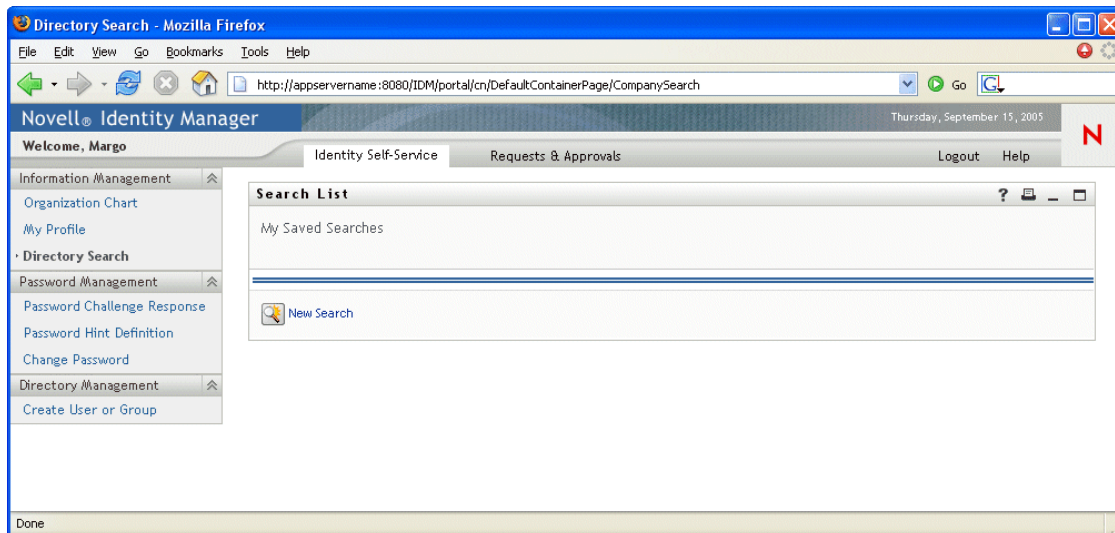
Margo doesn't yet have any saved searches to choose from, so she defines a **new search**.

There's a user she wants to contact whose first name begins with the letter C, but she can't remember the full name. She just needs to specify a **basic search** with this criterion:

The **search results** display, enabling Margo to examine and work with her requested information:

Margo clicks from the **Identity tab** to the **Organization tab** in the search results to get another view of the information. She recalls that the person she seeks works for Kip Keller, so that narrows it down to Cal Central:

In addition to the tabs for different views, the search results page provides **links and buttons for performing actions** on its information. You can:

- **Sort the rows** of information by clicking the column headings

- **Display details** (Profile page) for a user, group, or task group by clicking its row
- **Send new e-mail** to a user by clicking the e-mail icon in that user's row
- **Save the search** for future reuse
- **Export the results** to a text file
- **Revise the search** by changing its criteria

When generating search results, you may sometimes need more than a basic search to describe the information you want. You can use an **advanced search** to specify complex criteria.

If there's an advanced search that you might need to perform again, you can retain it as a **saved search**. Saved searches are even handy for basic searches that you run frequently. For instance, Margo MacKenzie has added a couple of saved searches that she often uses:
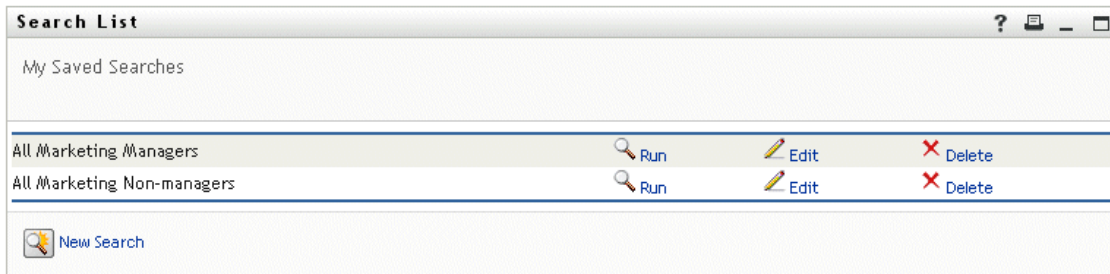
5.2 Performing basic searches

If you just need to specify a **single criterion** when searching for users, groups, or task groups, you can use a basic search. For example:

```
Last Name equals Smith
```

To perform a basic search:

1 Go to the Directory Search page and click the **New Search** button (at the bottom of the page).

The **Basic Search** page displays by default:
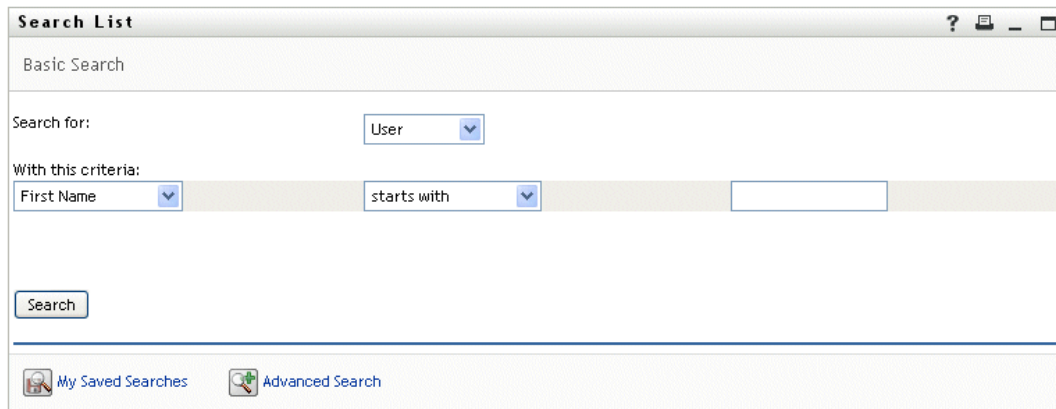
2 In the **Search for** dropdown, specify which type of information to find by selecting one of the following:

- Group

- Task Group
- User

3 In the **With this criteria** section, specify the criterion for the search:

   3a Use the **dropdown on the left** to select an **attribute** to search on. For example:

   `Last Name`

   The list of available attributes is determined by what you're searching for (users, groups, or task groups).

   3b Use the **dropdown in the middle** to select a **comparison operation** to perform against your chosen attribute. For example:

   `equals`

   For more information, see Section 5.3.1, "Selecting a comparison operation," on page 61.

   3c Use the **entry on the right** to specify a **value** to compare against your chosen attribute. For example:

   `Smith`

   For more information, see Section 5.3.2, "Specifying a value for your comparison," on page 62.

4 Click the **Search** button.

   Your **search results** display.

   To learn about what to do next, see Section 5.4, "Working with search results," on page 68.

5.3 Performing advanced searches

If you need to specify **multiple criteria** when searching for users, groups, or task groups, you can use an advanced search. For example:

`Last Name` **equals** `Smith` **AND** `Title` **contains** `Rep`

An advanced search consists of one or more **criteria groupings**. When defining a new advanced search, you begin with one criteria grouping by default. Within a criteria grouping, you specify each criterion that you want and connect them (such as in the example above) by using these **logical operations**:

- and
- or

If you specify **multiple criteria groupings** (to control the order in which criteria are evaluated), you'll use those logical operations to connect them too. For example, to perform an advanced search with the following criteria (two criteria groupings connected by an or):

`(Last Name` **equals** `Smith` **AND** `Title` **contains** `Rep)` **OR** `(First Name` **starts with** `k` **AND** `Department` **equals** `Sales)`

you would specify the following:

The result of this search is:

To perform an advanced search:

1 Go to the Directory Search page and click the **New Search** button (at the bottom of the page).

The Basic Search page displays by default.

2 Click the **Advanced Search** button (at the bottom of the page).

The Advanced Search page displays:

3 In the **Search for** dropdown, specify which type of information to find by selecting one of the following:

- Group
- Task Group
- User

You can now fill in the **With this criteria** section.

4 Specify a **criterion** of a criteria grouping:

4a Use the **dropdown on the left** to select an **attribute** to search on. For example:

```
Last Name
```

The list of available attributes is determined by what you're searching for (users, groups, or task groups).

4b Use the **dropdown in the middle** to select a **comparison operation** to perform against your chosen attribute. For example:

```
equals
```

For more information, see Section 5.3.1, "Selecting a comparison operation," on page 61.

4c Use the **entry on the right** to specify a **value** to compare against your chosen attribute. For example:

```
Smith
```

For more information, see Section 5.3.2, "Specifying a value for your comparison," on page 62.

5 If you want to specify **another criterion** of a criteria grouping:

5a Click the **Add Criteria** button on the right side of the criteria grouping:

5b On the left side of the new criterion, use the **Criteria Logical Operator** dropdown to connect this criterion with the preceding one; select either **and** or **or**.

5c **Repeat** this procedure, starting with Step 4.

TIP: To delete a criterion, click the **Remove Criteria** button to its right:

6 If you want to specify **another criteria grouping**:

6a Click **Add Criteria Grouping**:

Add Criteria Grouping

6b Above the new criteria grouping, use the **Criteria Grouping Logical Operator** dropdown to connect this grouping with the preceding one; select either **and** or **or**.

6c **Repeat** this procedure, starting with Step 4.

TIP: To delete a criteria grouping, click **Remove Criteria Grouping** directly above

it: Remove Criteria Grouping

---

7 Click the **Search** button.

Your **search results** display.

To learn about what to do next, see Section 5.4, "Working with search results," on page 68.

5.3.1 Selecting a comparison operation

The list of comparison (relational) operations available to you in a criterion is determined by the **type of attribute** specified in that criterion:

If the attribute is a	You can choose one of these comparison operations
String (text)	• starts with • contains • equals • ends with • is present • does not start with • does not contain • does not equal • does not end with • is not present
String (text) with a predetermined list of choices	• equals
User, group, task group (or other object identified by DN)	• is present • does not equal
Boolean (true or false)	• is not present

If the attribute is a	You can choose one of these comparison operations
Time (in date-time or date-only format)	• equals
Number (integer)	• greater than
	• greater than or equal to
	• less than
	• less than or equal to
	• is present
	• does not equal
	• not greater than
	• not greater than or equal to
	• not less than
	• not less than or equal to
	• is not present

5.3.2 Specifying a value for your comparison

The type of attribute specified in a criterion also determines how you specify the value for a comparison in that criterion:

If the attribute is a	You do this to specify the value
String (text)	**Type your text** in the **textbox** that displays on the right.
String (text) with a predetermined list of choices	**Select a choice** from the **dropdown** that displays on the right.
User, group, task group (or other object identified by DN)	**Use the Lookup, History, and Reset buttons** that display on the right.
Time (in date-time or date-only format)	**Use the Calendar and Reset buttons** that display on the right.
Number (integer)	**Type your number** in the **textbox** that displays on the right.
Boolean (true or false)	**Type true or false** in the **textbox** that displays on the right.

Note that **you don't specify a value** when the comparison operation is one of the following:

- is present
- is not present

Case in text

Text searches are **not case-sensitive**. You'll get the same results no matter which case you use in your value. For example, these are all equivalent:

```
McDonald
```

```
mcdonald

MCDONALD
```

Wildcards in text

You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character. For example:

```
Mc*

*Donald

*Don*

McD*d
```

Using the Lookup, History, and Reset buttons

This section describes how to use these buttons:

Button	What it does
	Looks up a value to use for a comparison
	Displays a History list of values used for a comparison
	Resets the value for a comparison

To look up a user:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a user):

The Lookup page displays:

2 Specify **search criteria** for the user you want:

2a Use the dropdown list to choose whether the search is by **First Name** or **Last Name**.

2b In the textbox next to the dropdown, type **all or part of the name** to search for.

The search will find every name that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

For instance, all of the following examples will find the first name Chip:

```
Chip
chip
c
c*
*p
*h*
```

NOTE: A manager lookup will search only for users who are managers. A task-manager lookup will search only for users who are task managers.

3 Click **Search**.

The Lookup page displays your **search results**:

If you see a **list of users** that includes the one you want, go to . Otherwise, go back to .

TIP: You can **sort** the search results in ascending or descending order by clicking the column headings.

4 **Select** the user you want from the list.

The Lookup page closes and **inserts the name of that user** into the appropriate entry as the value to use for your comparison.

To look up a group or task group:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a group or task group):

The Lookup page displays:

2 Specify **search criteria** for the group or task group you want:

  2a In the dropdown list, your only choice is to search by **Description**.

  2b In the textbox next to the dropdown, type **all or part of the description** to search for.

    The search will find every description that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

    For instance, all of the following examples will find the description Marketing:

```
Marketing
marketing
m
m*
*g
*k*
```

    NOTE: A group lookup will search for groups and task groups. But a task-group lookup will search only for task groups.

3 Click **Search**.

The Lookup page displays your **search results**:

If you see a **list of groups or task groups** that includes the one you want, go to Step 4. Otherwise, go back to Step 2.

> **TIP:** You can **sort** the search results in ascending or descending order by clicking the column heading.

4 **Select** the group or task group you want from the list.

The Lookup page closes and **inserts the description of that group or task group** into the appropriate entry as the value to use for your comparison.

To use the History list:

1 Click the **History** button to the right of an entry (whose previous values you want to see):

The History list displays, with values in alphabetical order:

2 Do one of the following:

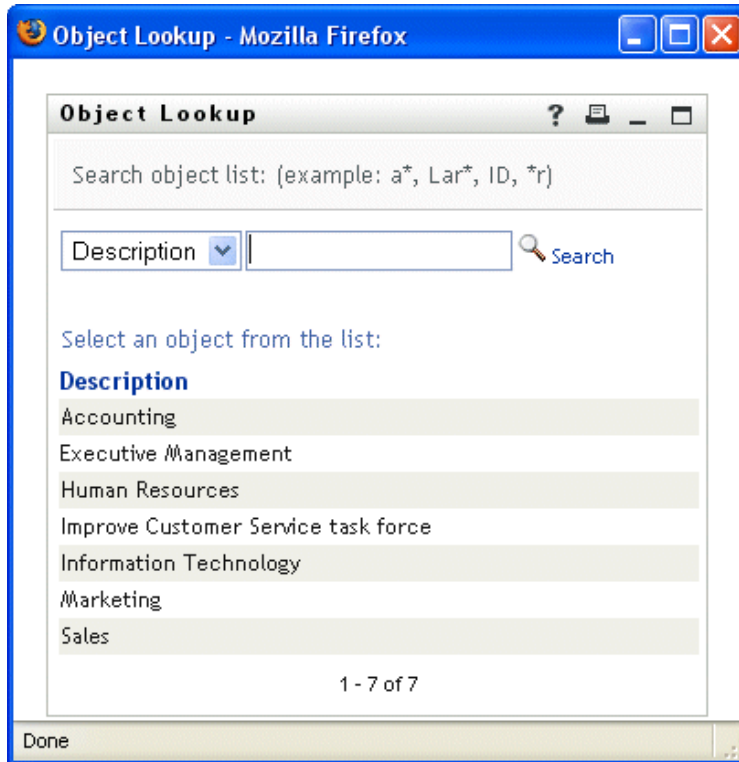| If you want to	Do this
Pick from the History list	**Select a value** that you want from the list.
	The History list closes and **inserts that value** into the appropriate entry as the value to use for your comparison.
Clear the History list	Click **Clear History**.
	The History list closes and **flushes its values** for this entry. Clearing the History list does not change the current value of the entry in your comparison.

Using the Calendar button

The Calendar lets you pick a **time** value to use for a comparison (in date-time or date-only format).

To use the Calendar:

1 Click the **Calendar** button to the right of an entry (for which you want to pick a time):

The Calendar displays:

2 To specify a **year, month, and day**:

   2a At the top of the Calendar, use the << and >> buttons to scroll to the year and month you want.

   2b **Select** the day you want in that month.

3 To specify an **hour and minute**:

   3a At the bottom of the Calendar, use the << and >> buttons to scroll to the hour you want.

   3b Use the < and > buttons to scroll to the minute you want.

   3c Click **OK**.

The Calendar closes and **inserts the specified time** into the appropriate entry as the value to use for your comparison.

5.4 Working with search results

This section tells you how to work with the results that display after a successful search:

5.4.1 About search results

The content of your search results depends on the **type of search** you perform:

For a user search

In the results of a user search, the list of users provides tabs for **three views** of the information:

- **Identity** (contact information)
- **Location** (geographical information)
- **Organization** (organizational information)

For a group search

In the results of a group search, the list of groups provides **a single view** of the information: **Organization**.

For a task group search

In the results of a task group search, the list of task groups provides **a single view** of the information: **Organization**.

5.4.2 Using the list

You can do the following with the **list of rows** that displays to represent your results:

- Switch to a different view
- Sort the rows

- Display detailed information
- Send e-mail to a user

To switch to a different view:

- Simply **click the tab** for the view you want to display.

To sort the rows of information:

1 **Click a column heading** by which you want to sort.

The initial sort is in ascending order.

2 You can **toggle between ascending and descending order** by clicking the column heading again (as often as you like).

To display details (Profile page) for a user, group, or task group:

1 **Click the row** for the user, group, or task group whose details you want to see (but don't click directly on an e-mail icon unless you want to send a message instead).

The Profile page displays, showing detailed information about your chosen user, group, or task group:
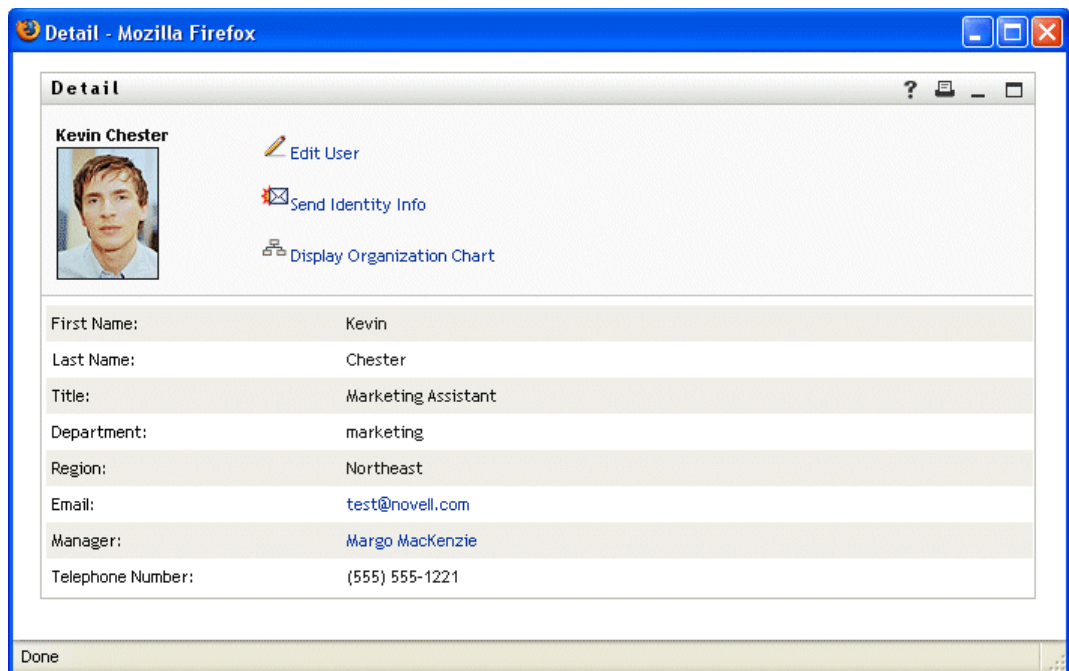
This page is just like the **My Profile** page on the Identity Self-Service tab. The only difference is that, when you are viewing details about another user, group, or task group (instead of yourself), **you may not be authorized** to see some of the data or perform some of the actions on the page. Consult your system administrator for assistance.

To learn about using the features of the Profile page, see Chapter 4, "Using My Profile," on page 37.

2 When you're done with the Profile page, you can **close its window**.

To send new e-mail to a user in the list:

1 **Find the row of a user** to whom you want to send e-mail.

2 Click the **e-mail icon** in that user's row:

A **new message** is created in your **default e-mail client**. The message is blank except for the **To** list, which specifies your chosen user as a recipient.

3 Fill in the message **contents**.

4 **Send** the message.

5.4.3 Other actions you can perform

While displaying search results, you can also:

• Save the search

• Export the results

• Revise the search

To save the current set of search criteria for future reuse:

1 Click the **Save Search** button (at the bottom of the page).

2 When prompted, **specify a name** for this search.

If you're viewing the results of **an existing saved search**, that search name displays as the default. This enables you to update a saved search with any criteria changes you've made.

Otherwise, if you type **a search name that conflicts** with the name of an existing saved search, a version number is automatically added to the end of the name when your new search is saved.

3 Click **OK** to save the search.

The **My Saved Searches** page displays so you can see your saved search listed.

To learn more about working with saved searches, see .

To export search results to a text file:

1 Click the **Export Results** button (at the bottom of the page).

The Export page displays:
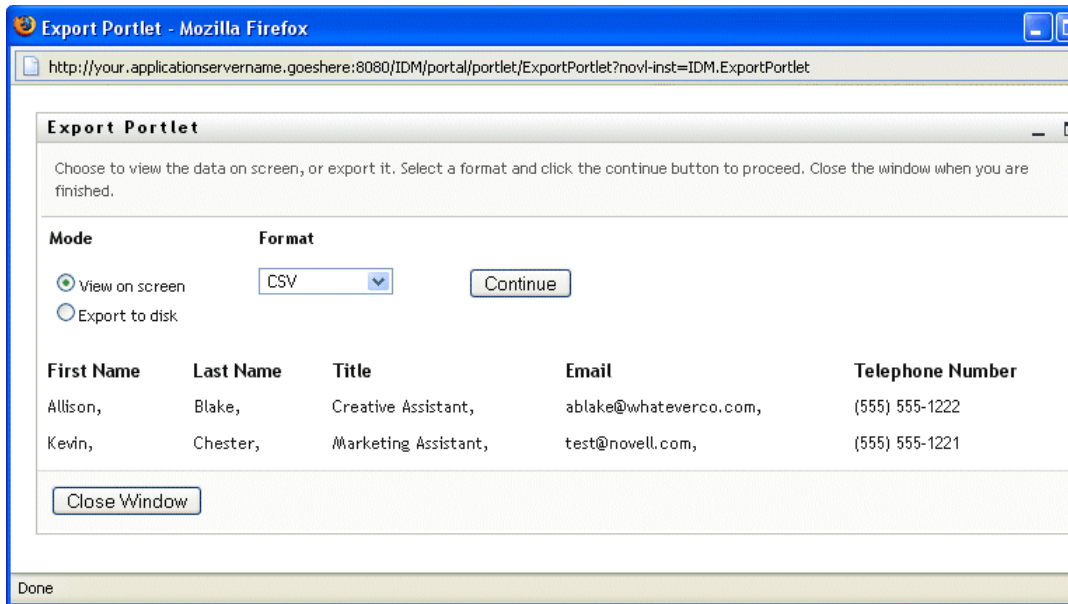
By default, the **View on screen** radio button is selected and **CSV** is chosen in the format dropdown. Consequently, the Export page shows your current search results in CSV (Comma Separated Value) format.

2 If you want to see what those search results look like in **Tab Delimited** format instead, select Tab Delimited in the dropdown, then click the **Continue** button.

3 When you're ready to export your current search results to a text file, select the **Export to disk** radio button.

The Export page displays as follows:
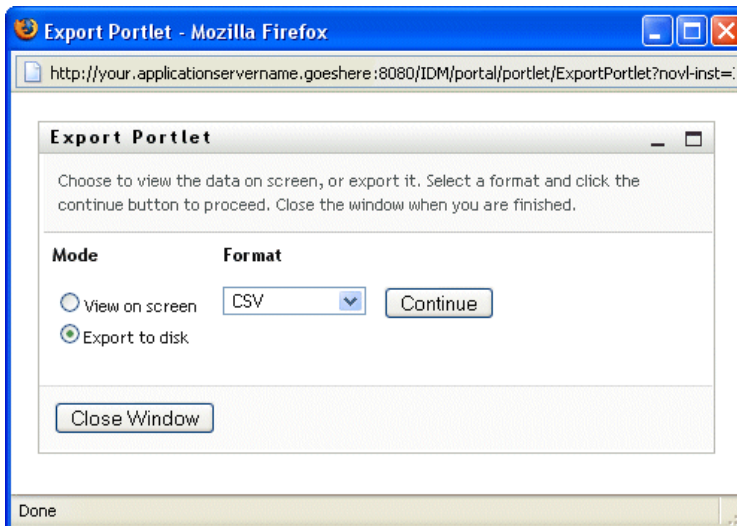
4 Use the format dropdown to **select one of the following formats** for the exported search results:

Export format	Default name of generated file
CSV	SearchListResult.*date*.*time*.csv
	For example:
	`SearchListResult.27-Sep-05.11.21.47.csv`
Tab Delimited	SearchListResult.*date*.*time*.txt
	For example:
	`SearchListResult.27-Sep-05.11.20.51.txt`
XML	SearchListResult.*date*.*time*.xml
	For example:
	`SearchListResult.27-Sep-05.11.22.51.xml`

Then click the **Continue** button.

5 When prompted, **specify where to save** the file of exported search results on disk.

6 When you're finished exporting, click **Close Window**.

To revise a search (by changing its criteria):

1 Click the **Revise Search** button (at the bottom of the page).

This takes you to either the **Basic Search** page or the **Advanced Search** page, depending on the complexity of the current search criteria. You'll see those criteria on the page.

2 Make your **revisions to the search criteria** according to the instructions in these sections:

5.5 Using saved searches

This section describes what you can do with searches once you save them, including:

- Listing your saved searches
- Running a saved search
- Editing a saved search
- Deleting a saved search

When you go to Directory Search, the **My Saved Searches** page displays by default. It lists your saved searches so you can run, edit, or delete them:
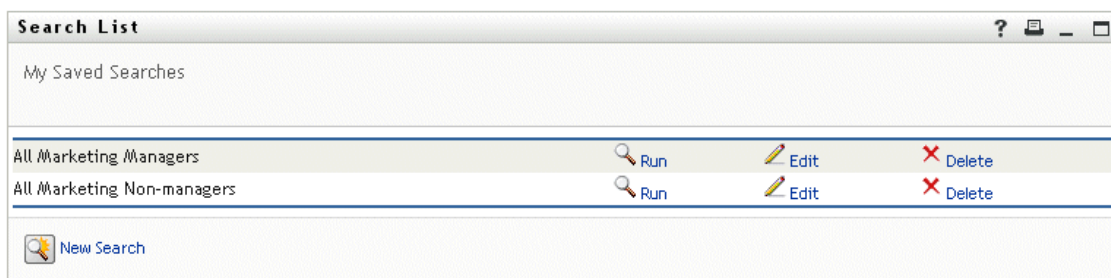
If you want to return to My Saved Searches later (from another page of Directory Search), use the following procedure.

To list your saved searches:

• Click the **My Saved Searches** button at the bottom of a Directory Search page.

The My Saved Searches page displays.

To run a saved search:

1 In the My Saved Searches list, **find a saved search** that you want to perform.
2 Click **Run** in the row for that saved search (or click the beginning of that row).
   Your **search results** display.
   To learn about what to do next, see Section 5.4, "Working with search results," on page 68.

To edit a saved search:

1 In the My Saved Searches list, **find a saved search** that you want to revise.
2 Click **Edit** in the row for that saved search.
   This takes you to either the **Basic Search** page or the **Advanced Search** page, depending on the complexity of the saved search criteria. You'll see those criteria on the page.
3 Make your **revisions to the search criteria** according to the instructions in these sections:

   • Section 5.2, "Performing basic searches," on page 57
   • Section 5.3, "Performing advanced searches," on page 58

4 To **save your changes** to the search, see Section 5.4, "Working with search results," on page 68.

To delete a saved search:

1 In the My Saved Searches list, **find a saved search** that you want to delete.
2 Click **Delete** in the row for that saved search.
3 When prompted, click **OK** to confirm the deletion.

Performing Password Management

6

This chapter tells you how to use the **Password Management** pages on the **Identity Self-Service tab** of the Identity Manager user interface. Topics include:

NOTE: This chapter describes the **default features** of the Password Management pages. Please be aware that **you may encounter some differences** due to your job role, your level of authority, and customizations made for your organization; **consult your system administrator** for details.

For more general information about accessing and working with the Identity Self-Service tab, see Chapter 2, "Introducing the Identity Self-Service Tab," on page 23.

6.1 About Password Management

You can use the Password Management pages to do any of the following, as needed:

This Password Management page	Enables you to
Password Challenge Response	Set or change either of the following: • Your valid responses to administrator-defined challenge questions • User-defined challenge questions and responses
Password Hint Definition	Set or change your password hint
Change Password	Change (reset) your password, according to the rules established by your system administrator

6.2 Password Challenge Response
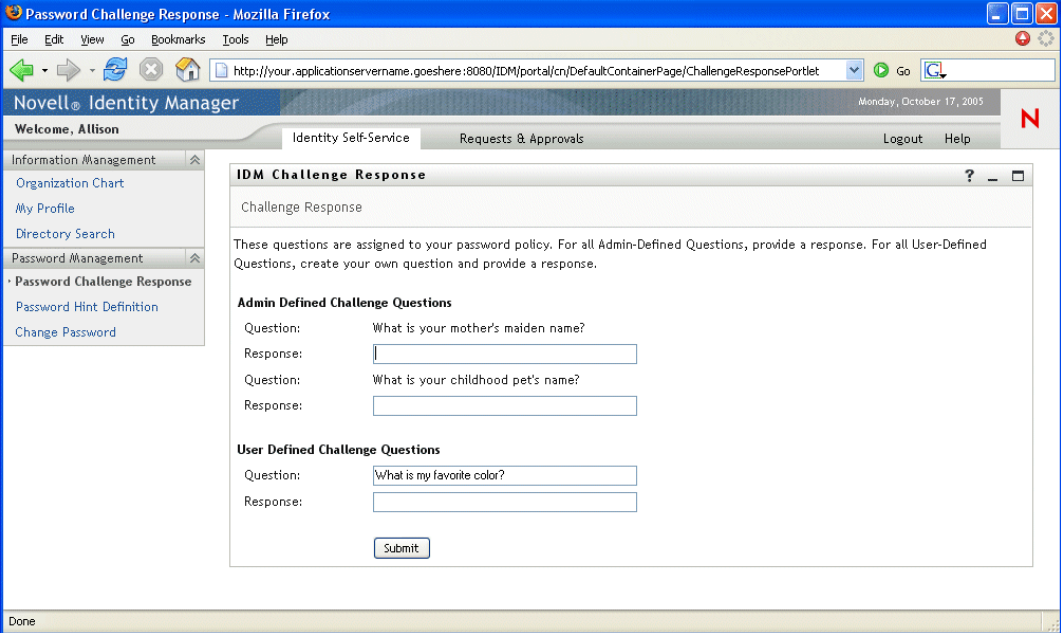
Challenge questions are used to verify your identity during login when you have forgotten your password. If the system administrator has set up an appropriate **password policy** that enables this feature for you, you can use the Password Challenge Response page to:

- Specify **responses** that will be considered valid for you when answering administrator-defined questions

- Possibly specify **your own question(s)** and the valid responses for them (if your password policy enables this)

To use the Password Challenge Response page:

1 On the Identity Self-Service tab, click **Password Challenge Response** in the menu (under Password Management).
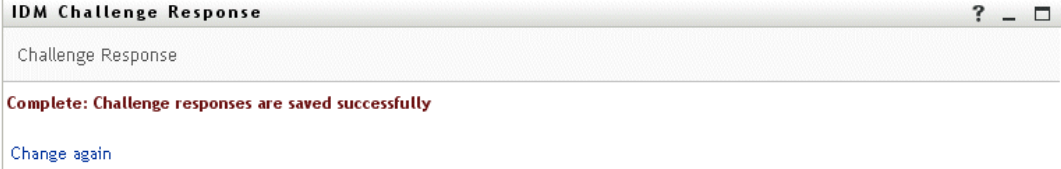
The Password Challenge Response page displays. For example:

Note that the **Response textboxes display as blank** (even if you have previously defined responses).

2 **Type an appropriate response** in each Response textbox (they are all required).

Make sure you specify responses that you can remember later.

3 Specify or change any **user-defined questions** that are required.

4 Click **Submit**.

The status of your request displays. For example:

6.3 Password Hint Definition

A **password hint** is used during login to help you remember your password when you have forgotten it. You can use the Password Hint Definition page to set or change your password hint.

To use the Password Hint Definition page:

1 On the Identity Self-Service tab, click **Password Hint Definition** in the menu (under Password Management).

The Password Hint Definition page displays:
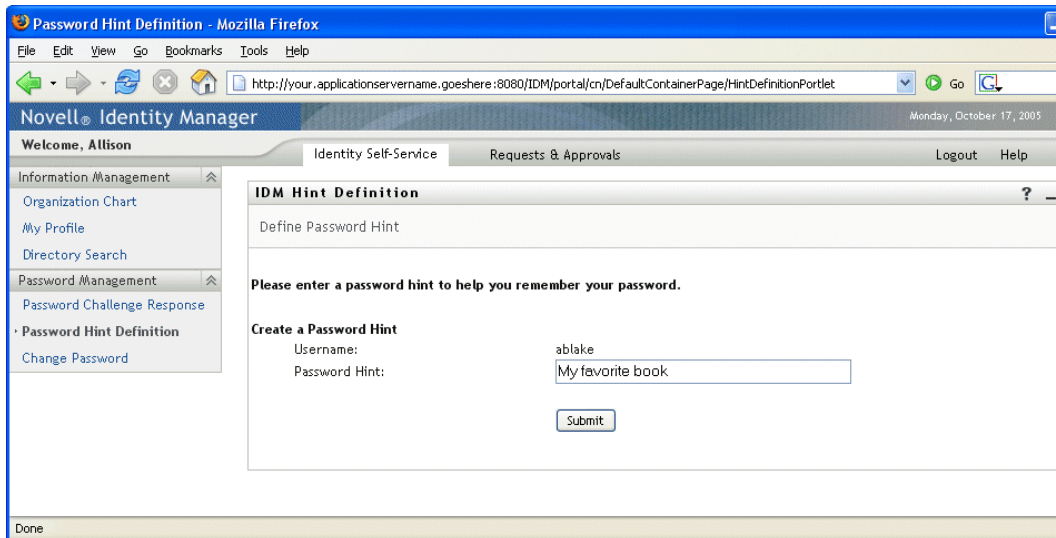
2 **Type the new text** for your hint.

NOTE: Your **password cannot appear** within the hint text.

---

3 Click **Submit**.

The status of your request displays. For example:
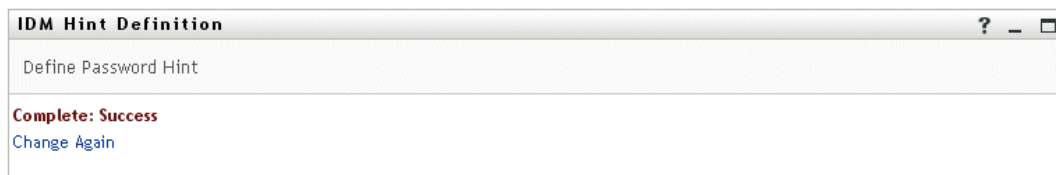
6.4 Change Password

You can use this page whenever you need to change your password (providing that the system administrator has enabled you to do so).

To use the Change Password page:

1 On the Identity Self-Service tab, click **Change Password** in the menu (under Password Management).

The Change Password page displays. If the system administrator has set up a **password policy** for you, the Change Password page typically provides information about how to specify a password that meets the policy's requirements. For example:
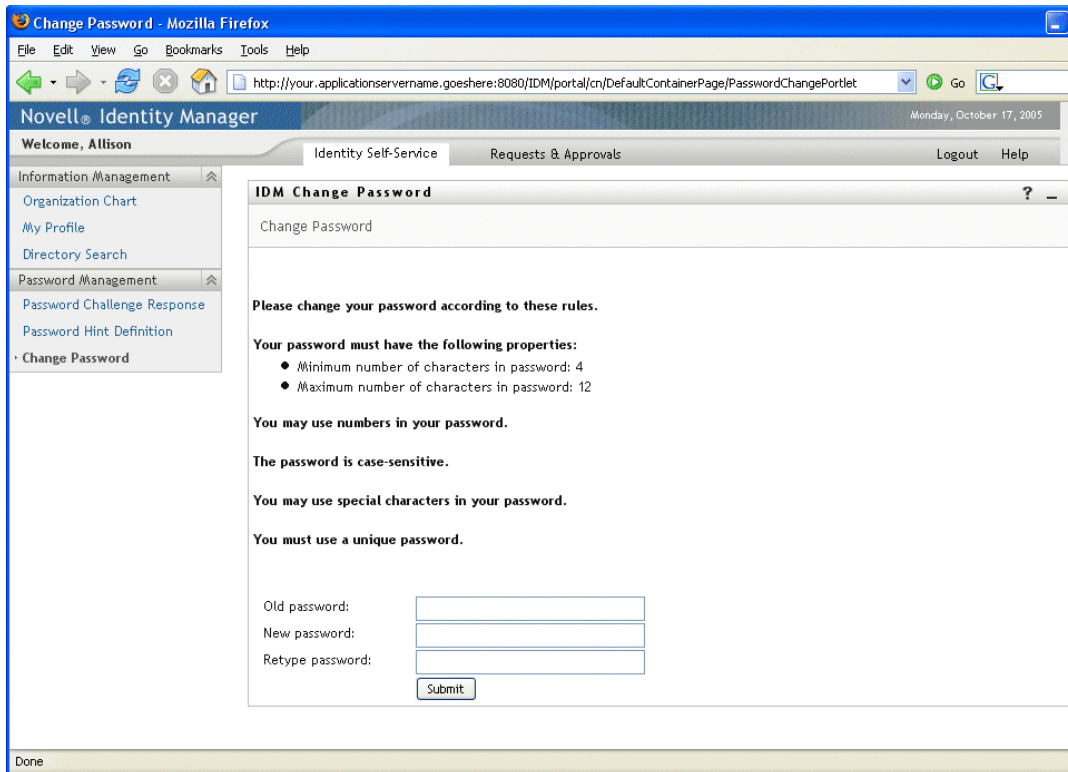
If **no password policy** applies, you'll see the basic Change Password page:
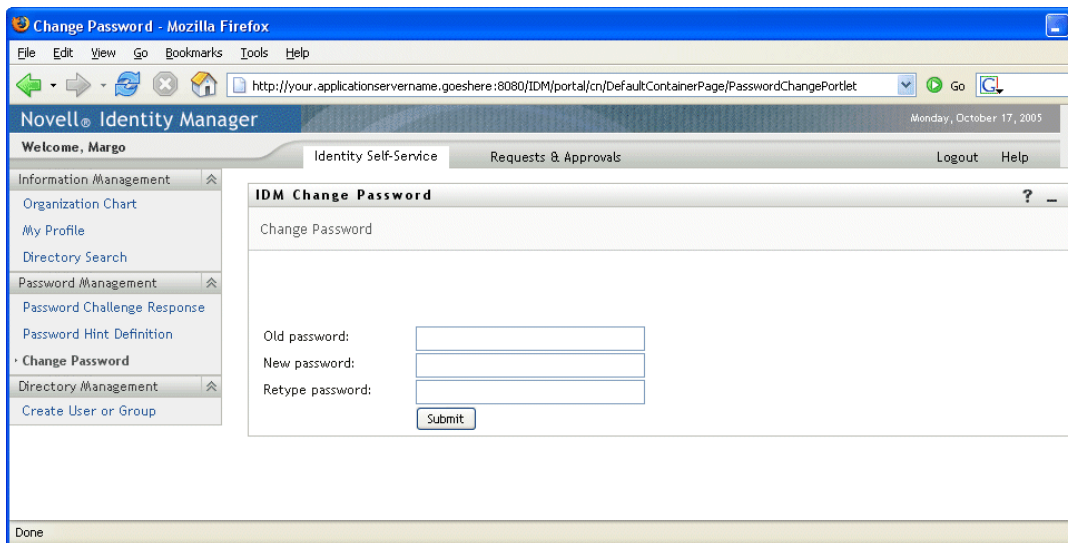
2 Type your current password in the **Old password** textbox.

3 Type your new password in the **New password** textbox.

4 Type your new password again in the **Retype password** textbox.

5 Click **Submit**.

The status of your request displays. For example:

IDM Change Password   ? _ □

Change Password

Complete: Password Changed
Change Again

Creating Users or Groups

<div style="text-align: right; font-size: 3em;">7</div>
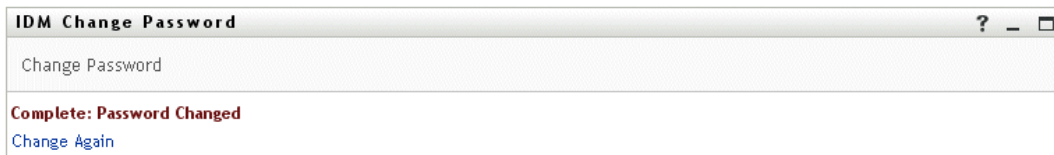
This chapter tells you how to use the **Create User or Group** page on the **Identity Self-Service tab** of the Identity Manager user interface. Topics include:

NOTE: This chapter describes the **default features** of the Create User or Group page. Please be aware that **you may encounter some differences** due to your job role, your level of authority, and customizations made for your organization; **consult your system administrator** for details.

For more general information about accessing and working with the Identity Self-Service tab, see Chapter 2, "Introducing the Identity Self-Service Tab," on page 23.

7.1 About creating users or groups

You can use the Create User or Group page to create any of the following, as needed:

- **Users**
- **Groups**
- **Task groups**

A task group is a special kind of group that's used to manage a set of tasks on the Requests & Approvals tab of the Identity Manager user interface.
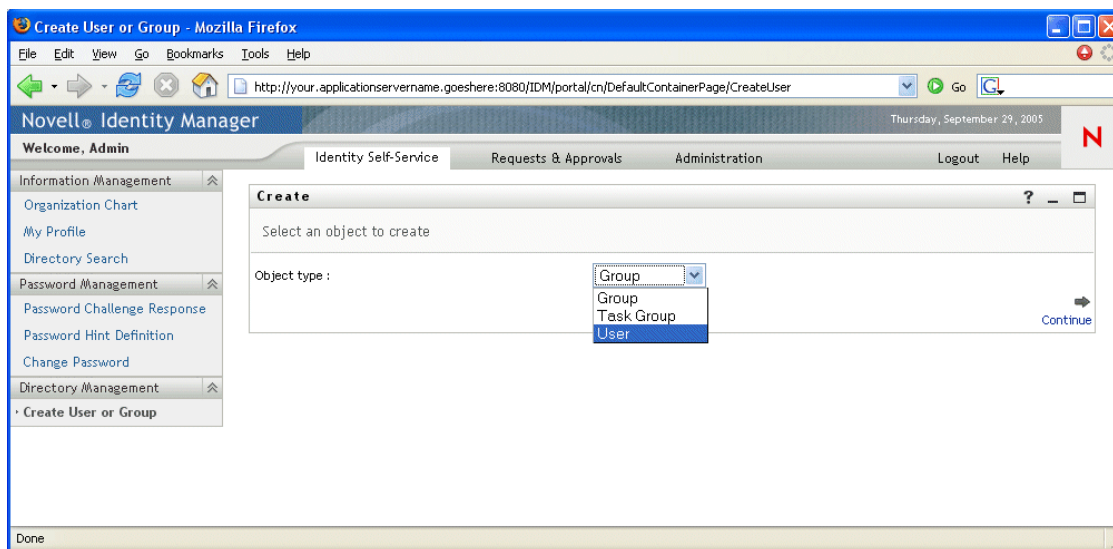
7.1.1 Who can use this page

By default, **only the system administrator** can see and use the Create User or Group page. Where appropriate, the system administrator **can enable others** (typically, selected people in administration or management positions) to access this page too.

Note to the system administrator — Details on enabling access to the Create User or Group page are presented in the Page Administration chapter of the Identity Manager User Application: Administration Guide.

7.1.2 Listing existing users, groups, or task groups

If you want to check on which users, groups, or task groups already exist before creating new ones, you can use the **Directory Search** page.

For more information, see Chapter 5, "Using Directory Search," on page 55.

7.2 Creating a user

If you want to create a new user and are authorized to access the Create User or Group page for that purpose, follow these steps.

To create a user:

1 On the Identity Self-Service tab, click **Create User or Group** in the menu (under Directory Management, if displayed).

The **Select an object to create** panel displays.

2 Use the Object type dropdown to select **User**, then click **Continue**.

The **Set attributes for this User** panel displays:

3 In the **Base Parameters** section, specify values for the following required attributes:

Attribute	What to specify
Object ID	The **username** for this new user.
Container	An **organizational unit** in the identity vault under which you want the new user stored (such as an OU named users). For example: `ou=users,ou=MyUnit,o=MyOrg` To learn about using the buttons provided to specify a container, see Section 7.2, "Creating a user," on page 82. **NOTE:** You won't be prompted for Container if the system administrator has established a default create container for this type of object.

4 In the **Object Attributes** section, specify the details about this new user.

At minimum, you must fill in the required attributes: **First Name** and **Last Name**.

&   To learn about using the buttons provided to specify values for certain attributes, see Section 7.2, "Creating a user," on page 82.

5 Click **Continue**.

The **Create Password** panel displays:

If a password policy is in effect for the target container, this panel provides information about how to specify a password that meets the policy's requirements. The password is also validated against that policy.

6 Type a password for the new user in the **Password** and **Confirm Password** textboxes, then click **Continue**.

> **NOTE:** This sets the new user's **initial password**. When that user first logs in, the Identity Manager user interface will prompt the user to change this password.

The user and password are created, then the **Review** panel displays to summarize the result:

The Review panel provides a couple of **optional links** that you might find handy. You can:

- Click **the new user's name** to display the Profile page of detailed information for this user

> **TIP:** From the Profile page, you can edit the user's details to make changes (if needed) or even delete the user (if the system administrator has given you this ability).

- Click **Create Another** to return to the initial panel of the Create User or Group page

7.3 Creating a group

If you want to create a new group and are authorized to access the Create User or Group page for that purpose, follow these steps.

To create a group:

1 On the Identity Self-Service tab, click **Create User or Group** in the menu (under Directory Management, if displayed).

The **Select an object to create** panel displays.

2 Use the Object type dropdown to select **Group**, then click **Continue**.

The **Set attributes for this Group** panel displays:

3 In the **Base Parameters** section, specify values for the following required attributes:

Attribute	What to specify
Object ID	The **group name** for this new group.
Container	An **organizational unit** in the identity vault under which you want the new group stored (such as an OU named groups). For example: `ou=groups,ou=MyUnit,o=MyOrg` To learn about using the buttons provided to specify a container, see Section 7.2, "Creating a user," on page 82. --- **NOTE:** You won't be prompted for Container if the system administrator has established a default create container for this type of object.

4 In the **Object Attributes** section, specify the details about this new group.

There is one required attribute that you must fill in: **Description**.

5 Click **Continue**.

The group is created, then the **Review** panel displays to summarize the result:

The Review panel provides a couple of **optional links** that you might find handy. You can:

- Click **the new group's name** to display the Profile page of detailed information for this group

  TIP: From the Profile page, you can edit the group's details to make changes (if needed) or even delete the group (if the system administrator has given you this ability).

- Click **Create Another** to return to the initial panel of the Create User or Group page

7.4 Creating a task group

If you want to create a new task group and are authorized to access the Create User or Group page for that purpose, follow these steps.

To create a task group:

1 On the Identity Self-Service tab, click **Create User or Group** in the menu (under Directory Management, if displayed).

The **Select an object to create** panel displays.

2 Use the Object type dropdown to select **Task Group**, then click **Continue**.

The **Set attributes for this Task Group** panel displays:

3 In the **Base Parameters** section, specify values for the following required attributes:

| Attribute	What to specify
Object ID	The **group name** for this new task group.
Container	An **organizational unit** in the identity vault under which you want the new task group stored (such as an OU named groups). For example: `ou=groups,ou=MyUnit,o=MyOrg` To learn about using the buttons provided to specify a container, see Section 7.2, "Creating a user," on page 82. **NOTE:** You won't be prompted for Container if the system administrator has established a default create container for this type of object.

4 In the **Object Attributes** section, specify the details about this new task group.

At minimum, you must fill in the required attribute: **Description**.

To learn about using the buttons provided to specify values for certain attributes, see Section 7.2, "Creating a user," on page 82.

5 Click **Continue**.

The task group is created, then the **Review** panel displays to summarize the result:
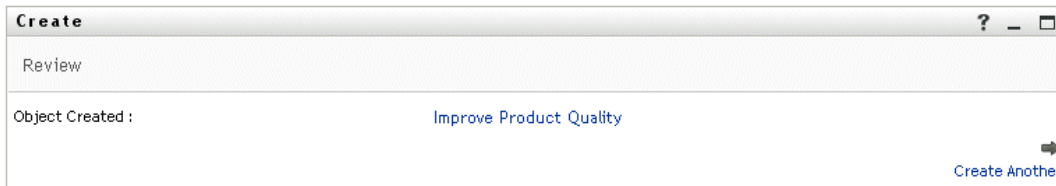
The Review panel provides a couple of **optional links** that you might find handy. You can:

- Click **the new task group's name** to display the Profile page of detailed information for this task group

---

TIP: From the Profile page, you can edit the task group's details to make changes (if needed) or even delete the task group (if the system administrator has given you this ability).

- Click **Create Another** to return to the initial panel of the Create User or Group page

7.5 Using the editing buttons

This section describes the editing buttons you can use while specifying values for attributes:

Button	What it does
	Looks up a value to use in an entry
	Displays a History list of values used in an entry
	Displays a Calendar to pick a time to use in an entry (in date-time or date-only format)
	Resets the value of an entry
	Adds a new entry
	Deletes an existing entry and its value

The following procedures tell you more about using some of these editing buttons.

To look up a container:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a container):

The Lookup page displays a **tree of containers**:
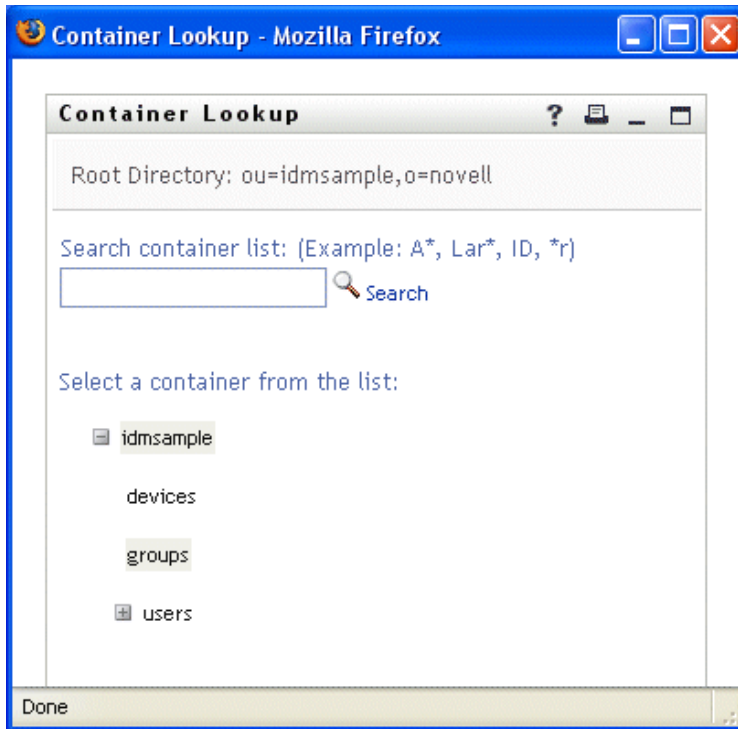
You can **expand or collapse the nodes** in this tree (by clicking the + or - buttons) to look for the container you want.

2 If necessary, specify **search criteria** for the container you want.

In the textbox, type **all or part of the container name** to search for. The search will find every container name that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

For instance, all of the following examples will find the container named users:

```
Users
users
u
u*
*s
*r*
```

3 Click **Search**.

The Lookup page displays your **search results**:
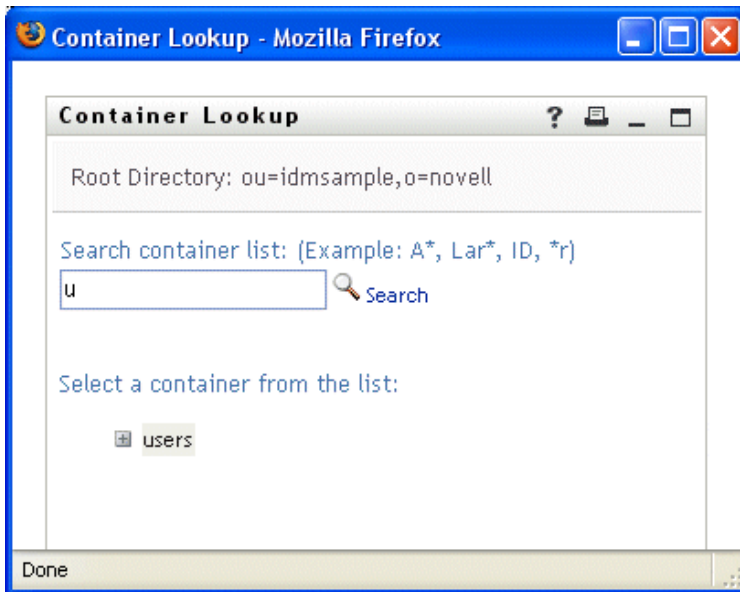
4 **Select** the container you want from the tree.

The Lookup page closes and **inserts the name of that container** into the appropriate entry.

To look up a user:

1 Click the **Lookup** button to the right of an entry (for which you want to look up a user):

The Lookup page displays:

2 Specify **search criteria** for the user you want:

  2a Use the dropdown list to choose whether the search is by **First Name** or **Last Name**.

  2b In the textbox next to the dropdown, type **all or part of the name** to search for.

    The search will find every name that **begins with** the text you type. It is **not case-sensitive**. You can optionally **use the asterisk (*) as a wildcard** in your text to represent zero or more of any character.

    For instance, all of the following examples will find the first name Chip:

```
Chip
chip
c
c*
*p
*h*
```

> **NOTE:** A manager lookup will search only for users who are managers. A task-manager lookup will search only for users who are task managers.

3 Click **Search**.

The Lookup page displays your **search results**:

If you see a **list of users** that includes the one you want, go to Step 4. Otherwise, go back to Step 2.

> **TIP:** You can **sort** the search results in ascending or descending order by clicking the column headings.

4 **Select** the user you want from the list.

The Lookup page closes and **inserts the name of that user** into the appropriate entry.

To use the History list:

1 Click the **History** button to the right of an entry (whose previous values you want to see):

The History list displays, with values in alphabetical order:

2 Do one of the following:

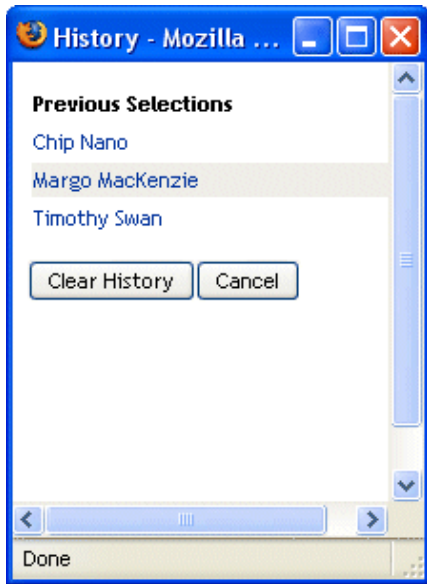| If you want to	Do this
Pick from the History list	**Select a value** that you want from the list. The History list closes and **inserts that value** into the appropriate entry.
Clear the History list	Click **Clear History**. The History list closes and **flushes its values** for this entry. Clearing the History list does not change the current value of the entry.

To use the Calendar:

1 Click the **Calendar** button to the right of an entry (for which you want to pick a time):

The Calendar displays:
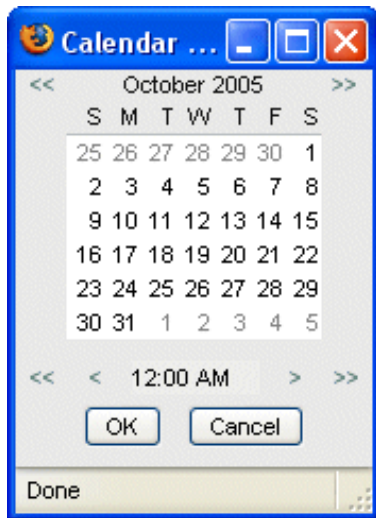
2 To specify a **year, month, and day**:

  2a At the top of the Calendar, use the **<<** and **>>** buttons to scroll to the year and month you want.

  2b **Select** the day you want in that month.

3 To specify an **hour and minute**:

  3a At the bottom of the Calendar, use the **<<** and **>>** buttons to scroll to the hour you want.

  3b Use the **<** and **>** buttons to scroll to the minute you want.

4 Click **OK**.

  The Calendar closes and **inserts the specified time** into the appropriate entry.

Using the Requests & Approvals Tab
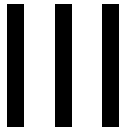
III

These chapters tell you how to use the Requests & Approvals tab of the Identity Manager user interface.

Introducing the Requests & Approvals Tab

8

This chapter provides an overview of the Requests & Approvals tab. Topics include:

For more general information about accessing and working with the Identity Manager user interface, see Chapter 1, "Getting Started," on page 13.

8.1 About the Requests & Approvals tab

The purpose of the Requests & Approvals tab is to give you a convenient way to **perform workflow-based provisioning actions**. These actions allow you to manage user access to secure resources in your organization. These resources may include digital entities such as user accounts, computers, and databases. For example, you might use the Requests & Approvals tab to:

- **Make provisioning requests** for yourself or your team
- **Manage provisioning work** (tasks and resource requests) for yourself or your team
- **Configure provisioning settings** for yourself or your team

When a provisioning request requires permission from one or more individuals in an organization, the request starts a workflow. The workflow coordinates the *approvals* needed to fulfill the request. Some resource requests require approval from a single individual; others require approval from several individuals. In some instances, a request can be fulfilled without any approvals.

When a provisioning request is initiated, the Provisioning System tracks the initiator and the recipient. The *initiator* is the person who made the request. The *recipient* is the person for whom the request was made.

Your **system administrator is responsible for setting up** the contents of the Requests & Approvals tab for you and the others in your organization. What you can see and do is typically determined by your job requirements and your level of authority.
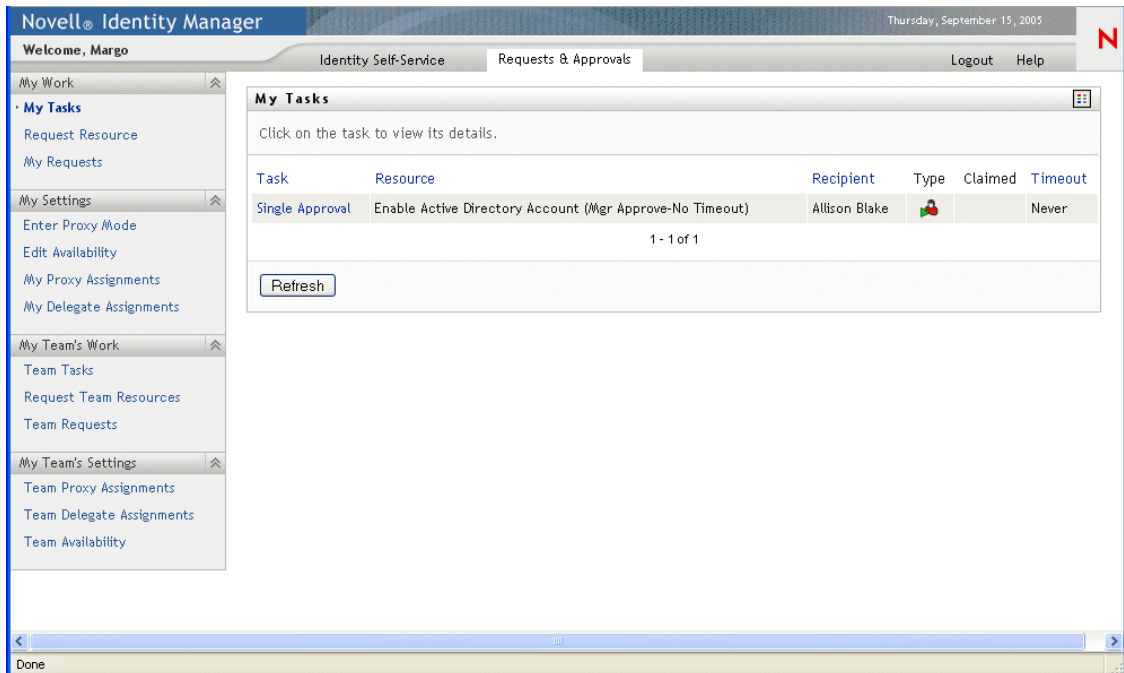

NOTE: The Requests & Approvals tab is available only if you have the Provisioning Module for Identity Manager.

8.2 Accessing the Requests & Approvals tab

By default, after you have logged in to the Identity Manager user interface, the Requests & Approvals tab opens and displays the **My Tasks** page:

If you go to another tab in the Identity Manager user interface but then want to return, you just need to **click the Requests & Approvals tab** to open it again.

8.3 Exploring the tab's features

This section describes the **default features** of the Requests & Approvals tab. (Note that your tab may look different due to customizations made for your organization; consult your system administrator.)

The left side of the Requests & Approvals tab displays a **menu of actions** you can perform. The actions are listed by **category** (My Work, My Settings, My Team's Work, and My Team's Settings):
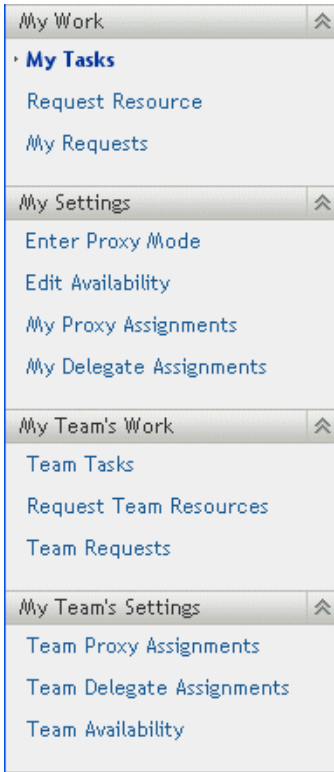
When you **click an action**, it displays a corresponding **page** on the right. The page typically contains a window that shows the details for that action. For example, it might display a list or a form where you can enter data or make a selection, as shown below:
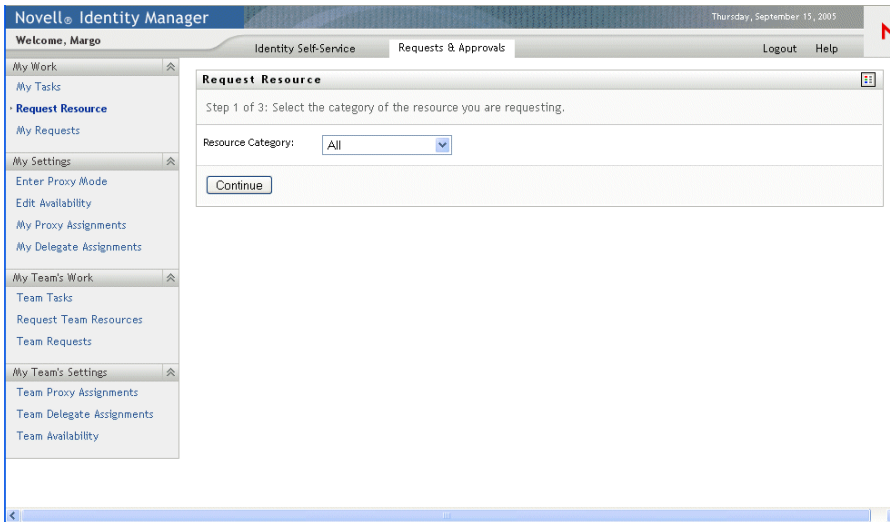

Most pages you work with on the Requests & Approvals tab include a button in the upper right corner that lets you display the **Requests & Approvals legend**:

For details on the Requests & Approvals legend, see Section 8.5, "Understanding the Requests & Approvals legend," on page 99.

8.4 Requests & Approvals actions you can perform

Here's a summary of the actions that are available to you by default on the Requests & Approvals tab:

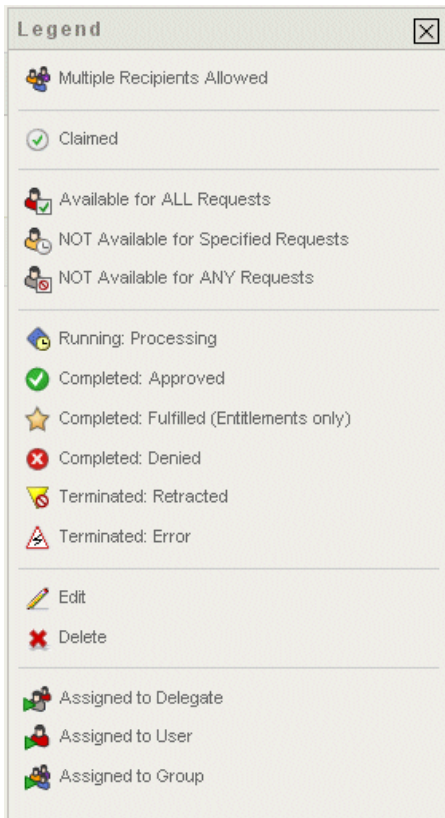| Category	Action	Description
My Work	My Tasks	Displays the approval tasks currently assigned to you in your workflow queue.
		For details, see Chapter 9, "Managing Your Work," on page 103.
	Request Resource	Lets you make a request for a resource
		For details, see Chapter 9, "Managing Your Work," on page 103.
	My Requests	Displays the status of the resource requests made by or for you. The list of requests therefore includes those in which you are the initiator or the requestor.
		For details, see Chapter 9, "Managing Your Work," on page 103.
My Settings	Enter Proxy Mode	Lets you act as a proxy for another user
		For details, see Chapter 10, "Configuring Your Provisioning Settings," on page 115.
	Edit Availability	Lets you specify which resource requests you are available to act on, and which resource requests you will let your assigned delegates act on.
		For details, see Chapter 10, "Configuring Your Provisioning Settings," on page 115.
	My Proxy Assignments	Lets you view or edit your proxy assignments. To edit proxy assignments, you must have the necessary authority.
		For details, see Chapter 10, "Configuring Your Provisioning Settings," on page 115.
	My Delegate Assignments	Lets you view or edit your delegate assignments. To edit delegate assignments, you must have the necessary authority.
		For details, see Chapter 10, "Configuring Your Provisioning Settings," on page 115.

Category	Action	Description
My Team's Work	Team Tasks	Displays the approval tasks assigned to members of your team
		For details, see Chapter 11, "Managing Your Team's Work," on page 135.
	Request Team Resource	Lets you make a request for a resource for a member of your team
		For details, see Chapter 11, "Managing Your Team's Work," on page 135.
	Team Requests	Displays the status of resource requests made by or for members of your team
		For details, see Chapter 11, "Managing Your Team's Work," on page 135.
My Team's Settings	Team Proxy Assignments	Lets you specify proxy assignments for members of your team
		For details, see Chapter 12, "Configuring Your Team's Provisioning Settings," on page 151.
	Team Delegate Assignments	Lets you specify delegate assignments for members of your team
		For details, see Chapter 12, "Configuring Your Team's Provisioning Settings," on page 151.
	Team Availability	Lets you specify which resource requests your team members are available to act on, and which resource requests the team member's delegates will act on
		For details, see Chapter 12, "Configuring Your Team's Provisioning Settings," on page 151.

8.5 Understanding the Requests & Approvals legend

Most pages you work with on the Requests & Approvals tab include a button in the upper right corner that lets you display the **Requests & Approvals legend**. To display the legend, click on this button:

The legend provides a brief description of the icons used throughout the Requests & Approvals tab. Here's what the legend looks like:

The table below provides detailed descriptions of the icons in the legend:

Icon	Description
Multiple Recipients Allowed	Indicates that this resource provides support for multiple recipients. When a resource supports multiple recipients, the Request Team Resources action lets you select multiple users as recipients.
	Appears on the Request Team Resources page.
Claimed	Indicates whether a particular workflow task has been claimed by a user.
	Appears on the My Tasks page.
Available for ALL Requests	Indicates that a particular user is available for all kinds of resource requests. This setting applies to delegation.
	Appears on the Edit Availability and Team Availability pages.
NOT Available for Specified Requests	Indicates that a particular user is not available for certain kinds of resource requests during a particular period. This setting applies to delegation. During the time period when a particular user is unavailable for these requests, the user delegated to act on these requests can work on them.
	Appears on the Edit Availability and Team Availability pages.

Icon	Description
NOT Available for ANY Requests	Indicates that a particular user is not available for any resource requests currently in the system. This setting applies to delegation. During the time period when a particular user is unavailable for a request, the user delegated to act on that request can work on it. Appears on the Edit Availability and Team Availability pages.
Running: Processing	Indicates that a particular resource request is still in process. Appears on the My Requests and Team Requests pages.
Completed: Approved	Indicates that a particular resource request has completed its processing and has been approved. Appears on the My Requests and Team Requests pages.
Completed: Fulfilled (Entitlements only)	Indicates that a particular resource request has completed its processing and has been fulfilled. This status applies only to resource requests that have an entitlement provisioning step. Appears on the My Requests and Team Requests pages.
Completed: Denied	Indicates that a particular resource request has completed its processing and has been denied. Appears on the My Requests and Team Requests pages.
Terminated: Retracted	Indicates that a particular resource request was retracted by a user (either the user who submitted the request, an Organizational Manager, or the User Application Administrator). Appears on the My Requests and Team Requests pages.
Terminated: Error	Indicates that a particular resource request was terminated because of an error. Appears on the My Requests and Team Requests pages.
Edit	Lets you edit a proxy or delegate assignment. To edit the assignment, click on the Edit icon. Appears in the My Proxy Assignments, My Delegate Assignments, Team Proxy Assignments, Team Delegate Assignments, Edit Availability, and Team Availability pages.
Delete	Lets you delete a proxy or delegate assignment. To delete the assignment, click on the Delete icon. Appears in the My Proxy Assignments, My Delegate Assignments, Team Proxy Assignments, Team Delegate Assignments, Edit Availability, and Team Availability pages.
Assigned to Delegate	Indicates that a particular workflow task has been delegated by another user. This task appears in the current user's queue because the original assignee has declared himself or herself unavailable. Since the current user is the original assignee's delegate, this user sees the task. Appears on the My Tasks and Team Tasks pages.

Icon	Description
Assigned to User	Indicates that a particular workflow task was assigned to a user. Appears on the My Tasks and Team Tasks pages.
Assigned to Group	Indicates that a particular workflow task was assigned to a group. Appears on the My Tasks and Team Tasks pages.

Managing Your Work

9

This chapter provides instructions for managing your provisioning work. Topics include:

9.1 About the My Work actions

The Requests & Approvals tab in the Identity Manager user application includes a group of actions called **My Work**. The My Work actions give you the ability to make resource requests, check the status of requests you've made, and perform tasks that have been assigned to you or to a group to which you belong.

The My Work actions also let you perform tasks as a delegate for another user. A delegated task appears in your queue when the original assignee for the task has declared himself or herself to be unavailable and has designated you as a delegate.

9.2 Managing your tasks

The **My Tasks** action lets you check your workflow queue for tasks that have been assigned to you. When a task is in your queue, you need to perform one of the following actions:

- Claim the task so you begin working on it
- Reassign the task to another user

NOTE: You must have the appropriate authority to reassign tasks. To reassign a task, you must be an Organizational Manager or User Application Administrator.

Once you've claimed a task to work on, you have the ability to take an action that will forward the workitem to the next activity within the workflow. The actions you can perform on a claimed task are described below:
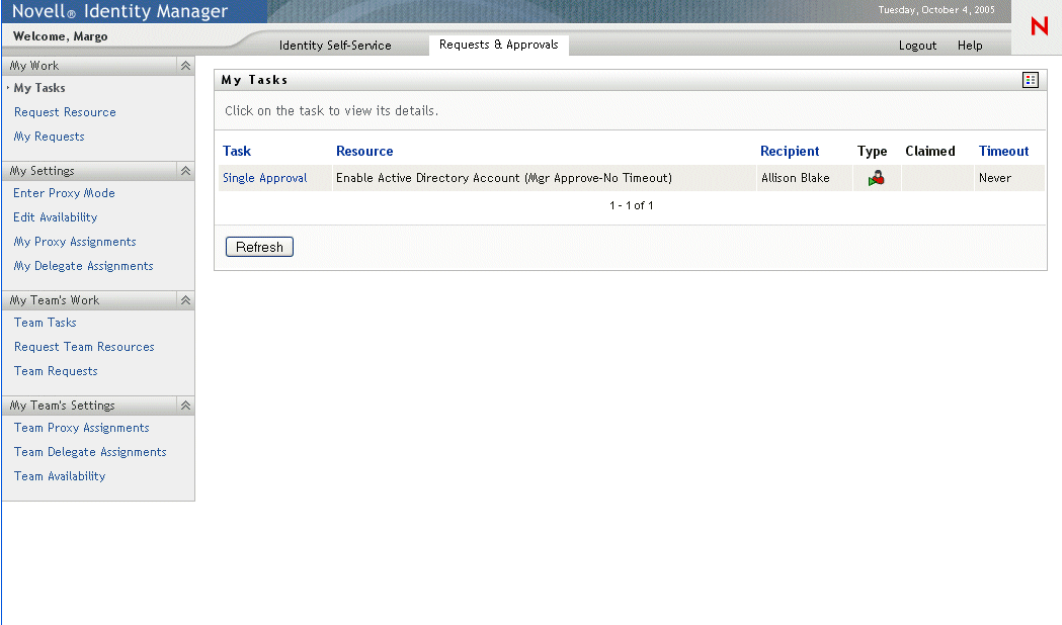
Forward action	Description
Approve	Allows you to give your approval to the request. When you approve a request, the workitem is forwarded to the next activity in the workflow.
Deny	Allows you to explicitly deny your approval to the request. When you deny a request, the workitem is forwarded to the next activity in the workflow and the request is denied. Typically, the workflow process terminates when a request is denied.

9.2.1 Viewing your tasks

To see the tasks that have been assigned to you:

1 Click **My Tasks** in the My Work group of actions.
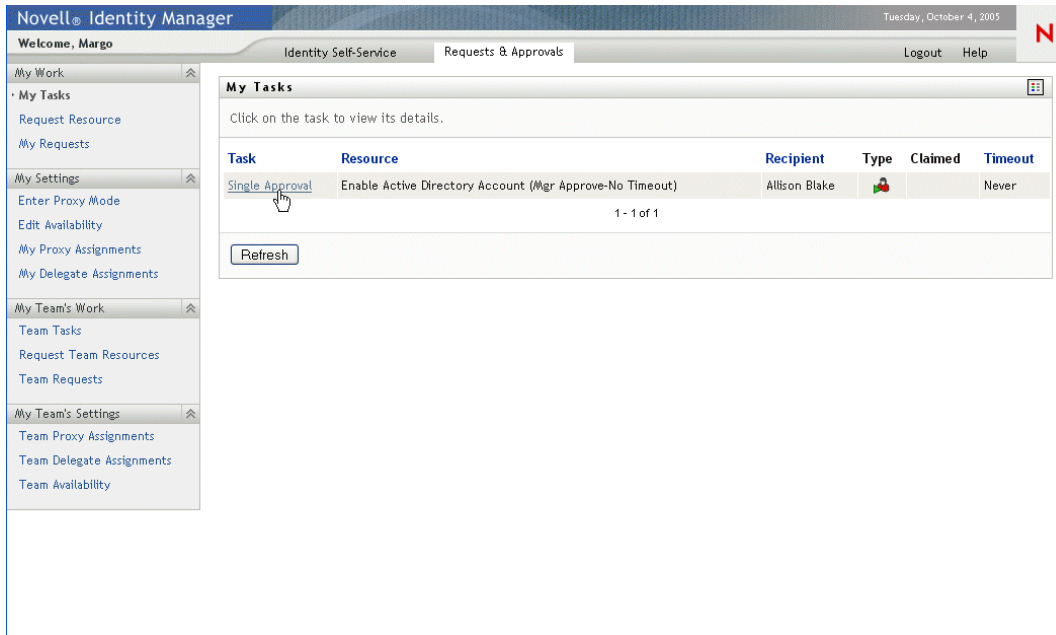
The list of tasks in your queue is displayed.
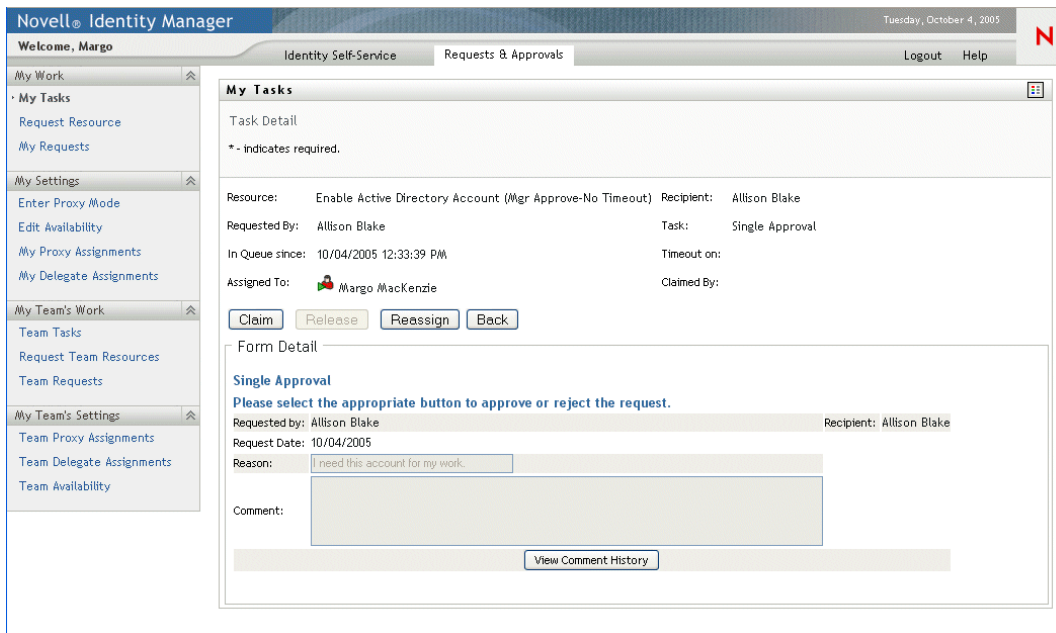

9.2.2 Selecting a task

To select a task in the queue list:

1 Click on the name of the task in the queue.
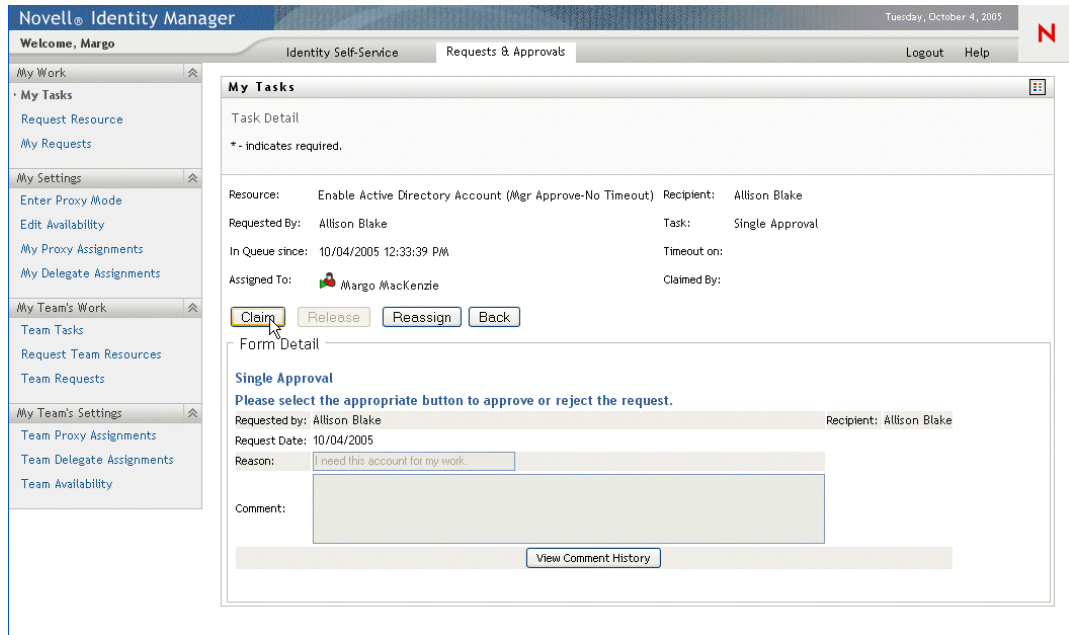
The Task Detail form is displayed.

2 To claim a task, follow the instructions under Section 9.2.3, "Claiming a task," on page 105.

3 To reassign a task, follow the instructions under Section 9.2.4, "Reassigning a task," on page 107.

4 To return to the task list, click **Back**.

9.2.3 Claiming a task

**To claim a task to work on:**

1 Click the **Claim** button.

The Form Detail section of the page is updated to include the Deny and Approve buttons, and the appropriate fields become editable.

NOTE: The fields and buttons on the form will vary depending on which resource you requested. Some forms may include a **Refuse** button.

2 To deny the request, click **Deny**.
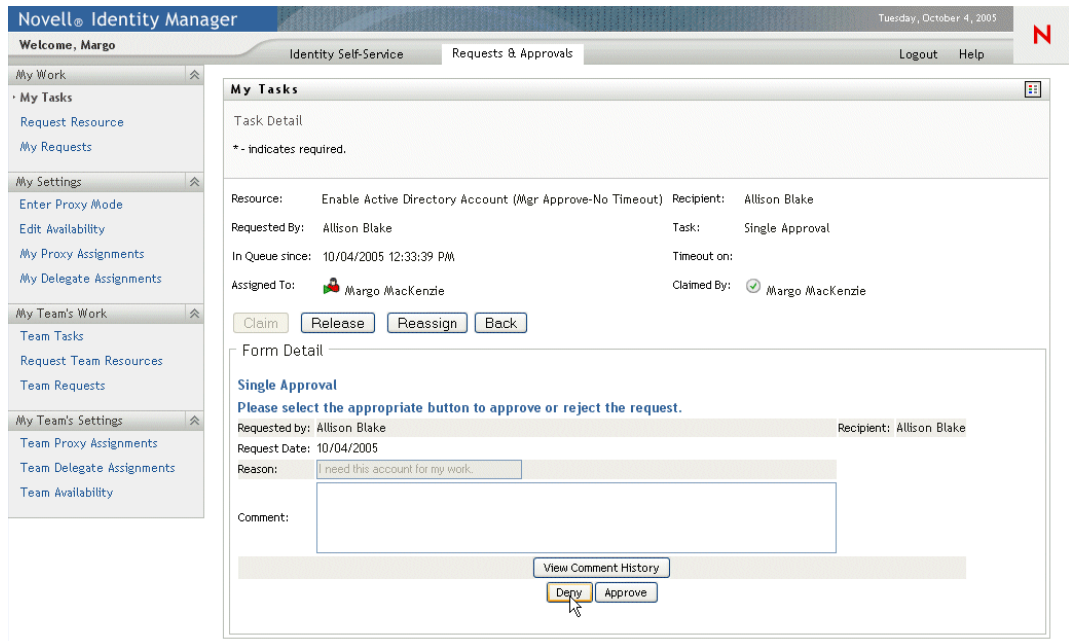
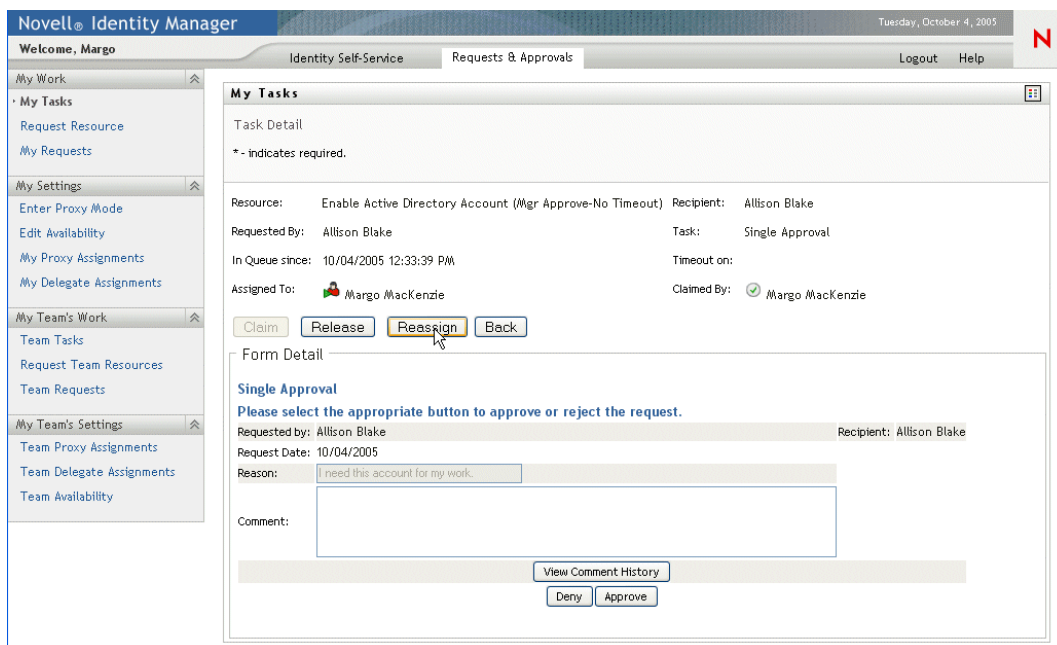

3 To approve the request, click **Approve**.
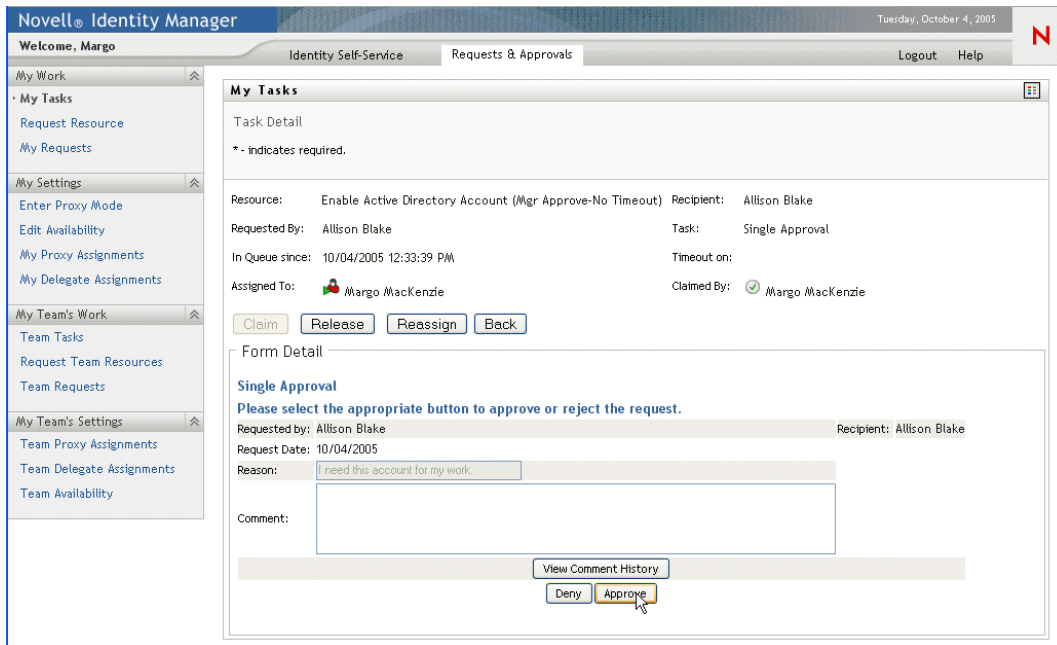
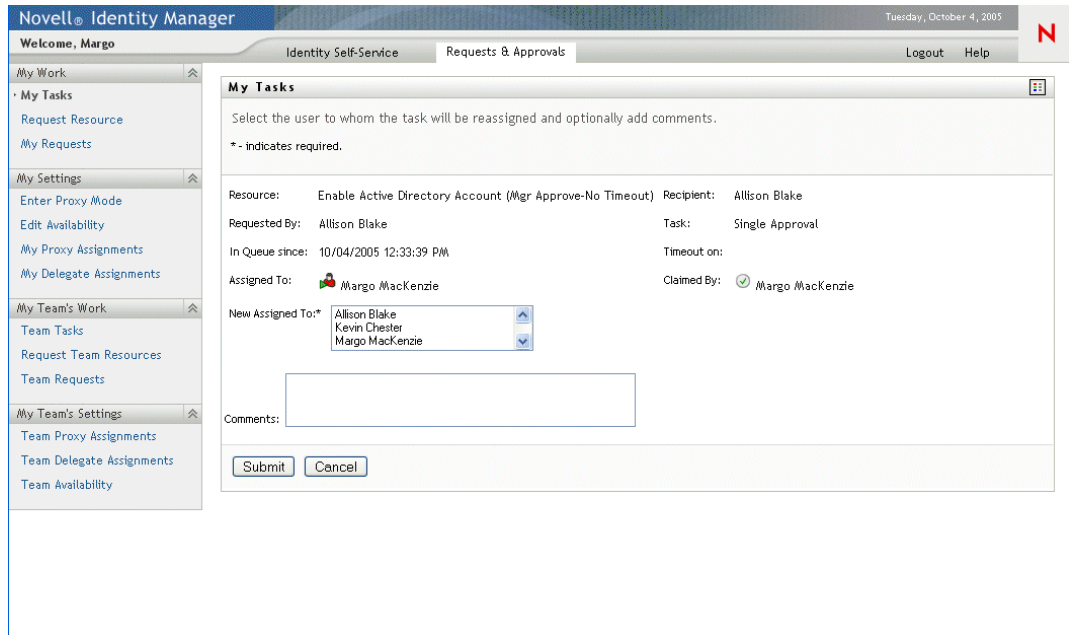The user application displays a message indicating whether the action was successful.

9.2.4 Reassigning a task

To reassign a task to another user:

1 Click the **Reassign** button.

The top section of the My Tasks page is updated to include the New Assigned To and Comments fields, as well as a Submit button.

2 Select the user you want to assign the task to in the **New Assigned To** field.

NOTE: An Organizational Manager can only reassign a task to a member of his/her team.

3 Optionally type a comment to explain the reason for the reassignment in the **Comments** field.

4 Click **Submit**.

The user application displays a message indicating whether the action was successful.

9.3 Requesting a resource

The **Request Resource** action allows you to make a resource request. When you initiate the request, the user application displays the initial request form. This form lets you specify all of the information needed for the request.

When a resource request requires permission from one or more individuals in an organization, the request starts a workflow. The workflow coordinates the *approvals* needed to fulfill the request. Some resource requests require approval from a single individual; others require approval from several individuals. In some instances, a request can be fulfilled without any approvals.

To request a resource:

1 Click **Request Resource** in the My Work group of actions.
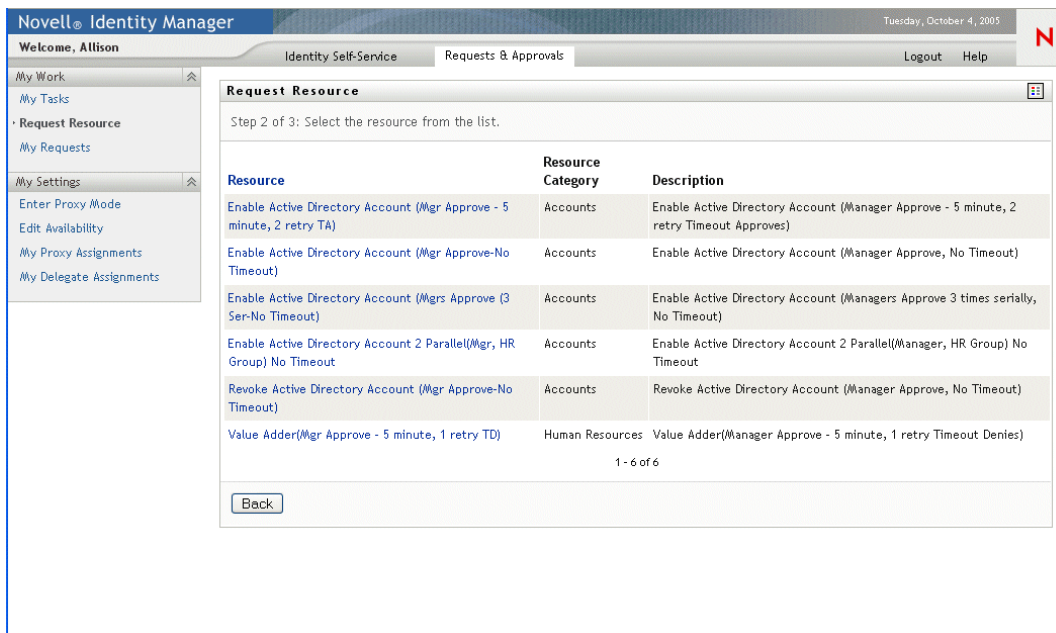
The Request Resource page is displayed.
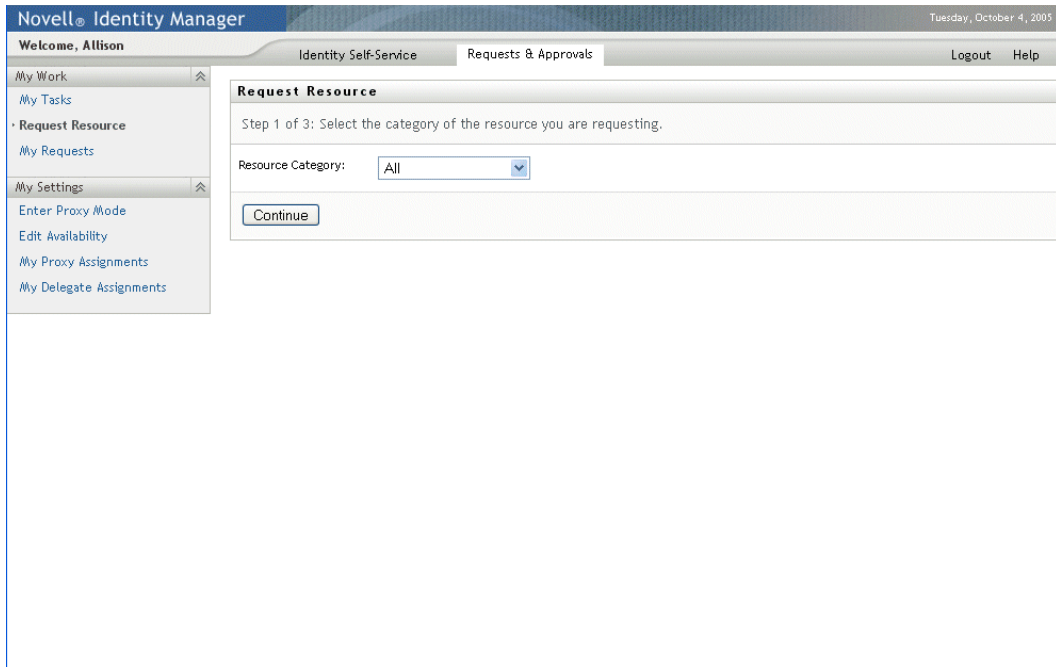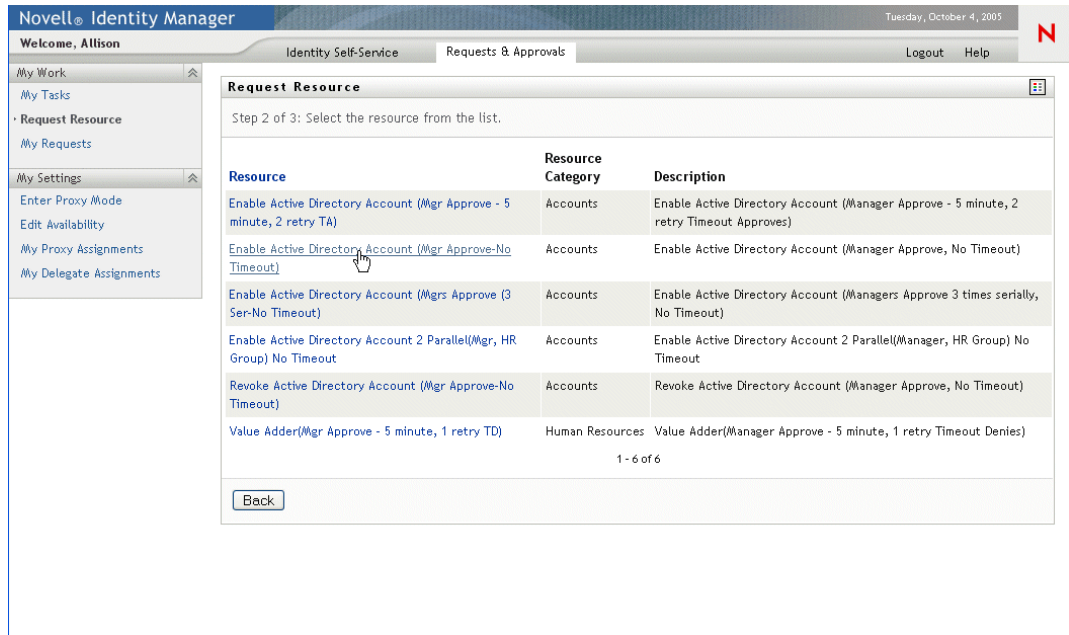
2 Select the category of the resource.

3 Click **Continue**.

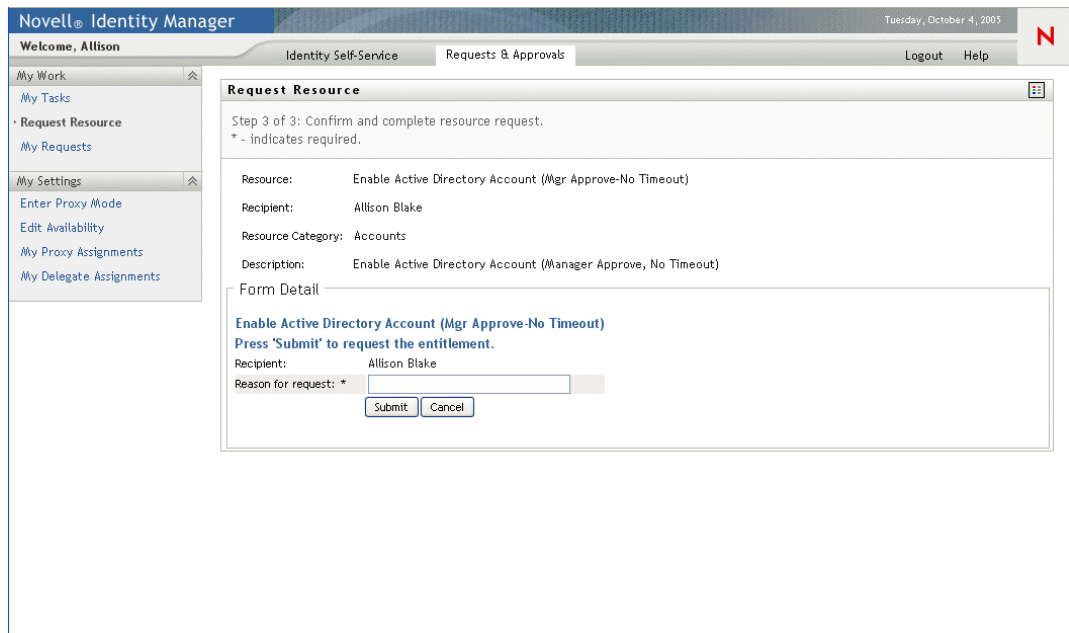The Request Resource page displays a list of resources available to the current user.

NOTE: The user application enforces security constraints to ensure that you see only those request types to which you have access rights.

4 Select the desired resource by clicking on the resource name.

The Request Resource page displays the initial request form.

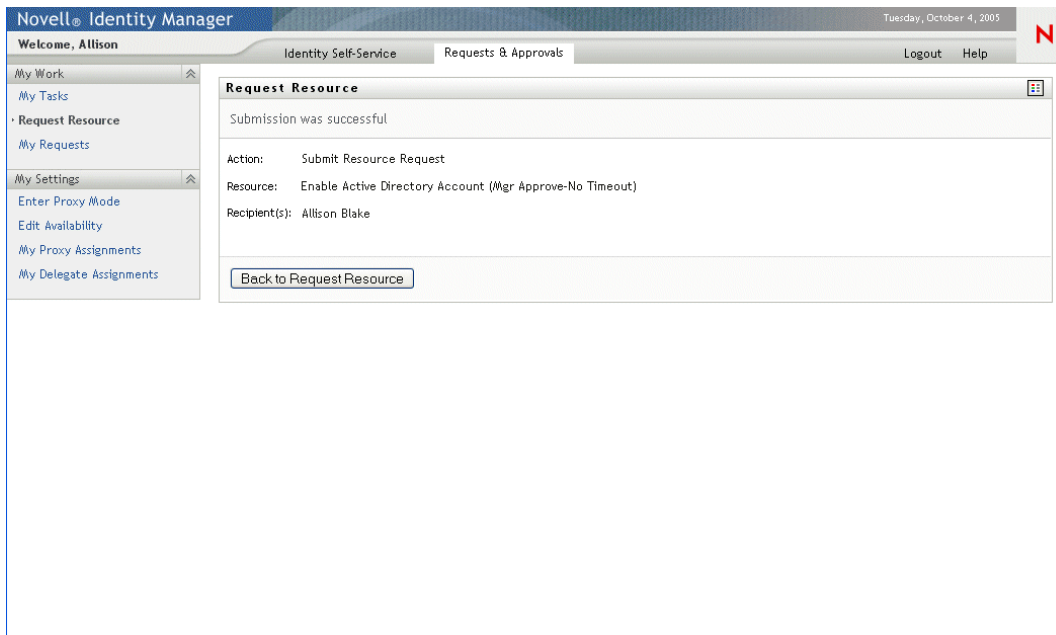**5** Fill in the fields on the initial request form.

NOTE: The fields on the form will vary depending on which resource you requested.

6 Click **Submit**.

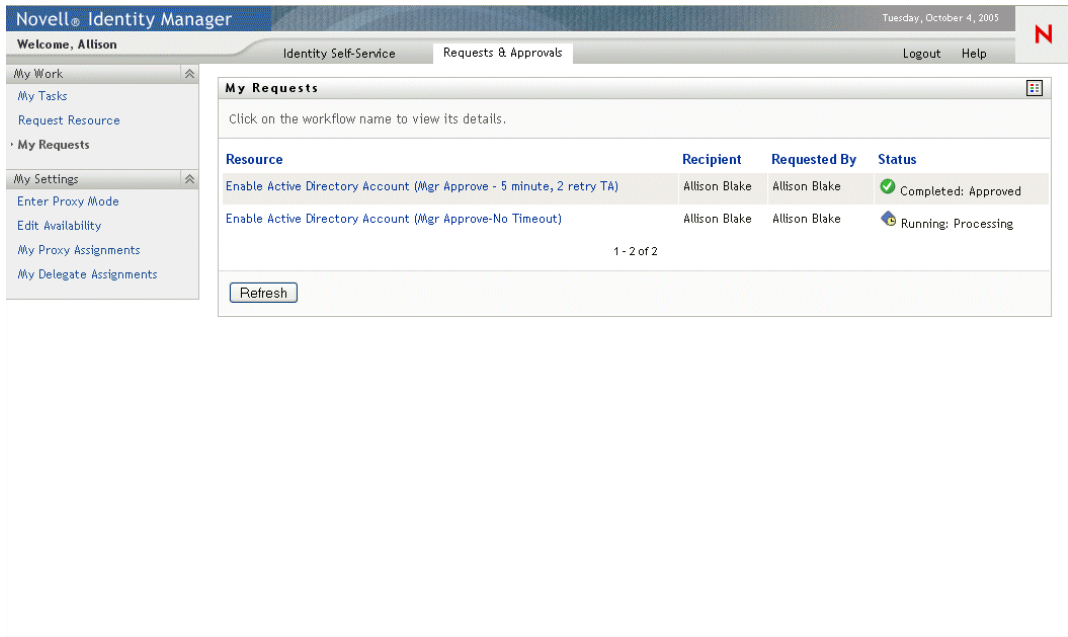The Request Resource page displays a status message indicating whether the request was submitted successfully.

9.4 Checking the status of your requests

The **My Requests** action allows you to see the status of the resource requests you've made. It lets you see the history and current state of each request. In addition, it gives you the option to retract a request that is still in process in the event that you have changed your mind and do not need to have the request fulfilled.

To view a list of your requests:

1 Click **My Requests** in the My Work group of actions.

The Request Resource page displays your requests. The list includes active requests, as well as requests that have already been approved or denied. The Workflow system retains workflow results for 120 days, and the Request Resource page will allow you to see these results.
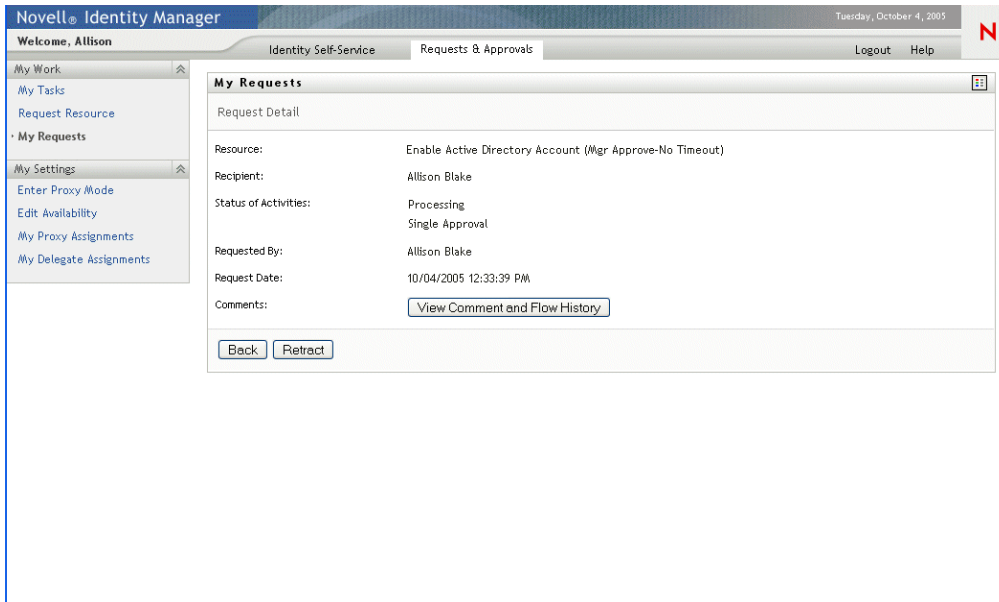
2 To view details about a particular resource request:

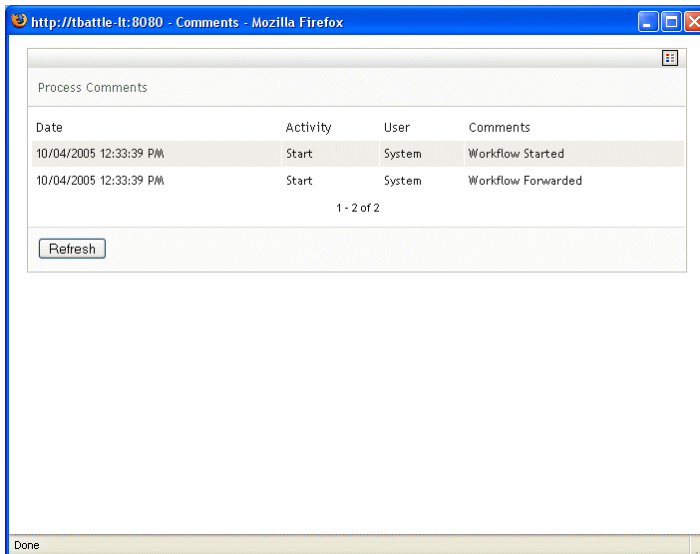   **2a** Select the request by clicking on the name.
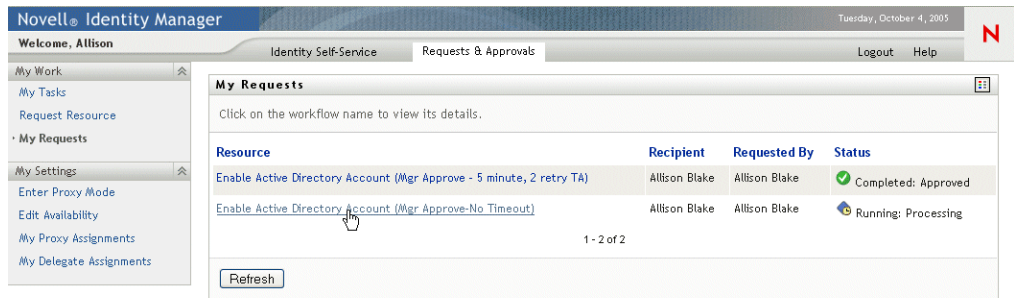
    The Request Resource page displays details such as when the request was initiated and what the current state of the workflow is.

2b To retract the request, click **Retract**.

2c To see the complete history of the workflow, including comments made at each stage of processing, click **View Comment and Flow History**.

Configuring Your Provisioning Settings

10

This chapter provides instructions for configuring your provisioning settings. Topics include:

10.1 About the My Settings actions

The Requests & Approvals tab in the Identity Manager user application includes a group of actions called **My Settings**. The My Settings actions give you the ability to act as a proxy for another user. In addition, they allow you to view your proxy and delegate assignments. If you are an Organizational Manager or User Application Administrator, you can also define proxy and delegate assignments.

10.1.1 About proxies and delegates

A *delegate* is a user authorized to perform work for another user. A delegate assignment applies to a particular type of resource request.

A *proxy* is a user authorized to perform any and all work (and also define provisioning settings) for one or more users, groups, or containers. Unlike delegate assignments, proxy assignments are independent of resource requests, and therefore apply to all work and settings actions.

Proxy and delegate assignments have time periods Both proxy and delegate assignments are associated with time periods. The time period for a proxy or delegate assignment can be as short or as long as you need it to be. The time period can also have no expiration date.

Proxy and delegate actions are logged If logging is enabled, any actions taken by a proxy or delegate are logged along with actions taken by other users. When an action is taken by a proxy or delegate, the log message clearly indicates that the action was performed by a proxy or delegate for another user. In addition, each time a new proxy or delegate assignment is defined, this event is logged as well.

Only proxies receive e-mail notifications If the User Application Administrator configures a provisioning request to generate e-mail notifications, proxies (as well as addressees) are notified by e-mail when a task has been assigned to them. Delegates are **not** included in e-mail notifications.

10.1.2 Sample usage scenarios

This section describes a few business scenarios where proxies and delegates might be used.

Proxy usage scenario

Suppose you are a manager who is responsible for approving (or denying) a large number of workflow task on a daily basis. In addition, you are also responsible for editing provisioning settings for a large number of users in your organization. In this situation, you might want to assign a proxy so that some of your work can be off-loaded to a trusted member of your team.

Delegate usage scenario

Suppose you are a manager who is responsible for approving or denying requests for ten different types of provisioned resources. All ten request types need regular attention, but you would rather have another individual in your organization attend to six of them. In this case, you could define a delegate for these six resource request types. If necessary, you could restrict this delegate relationship to a period of hours, day, or weeks only. Alternatively, you could specify no expiration for the delegate relationship, thereby establishing this relationship as a more permanent arrangement.
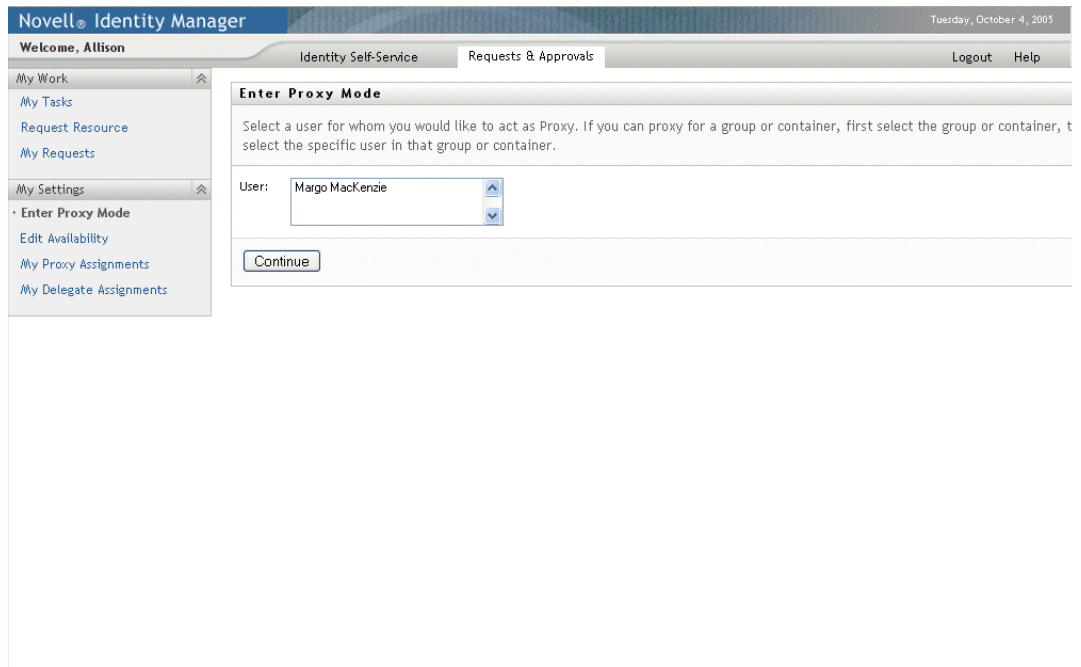
10.2 Acting as a proxy

The **Enter Proxy Mode** action allows you to act as a proxy for another user.
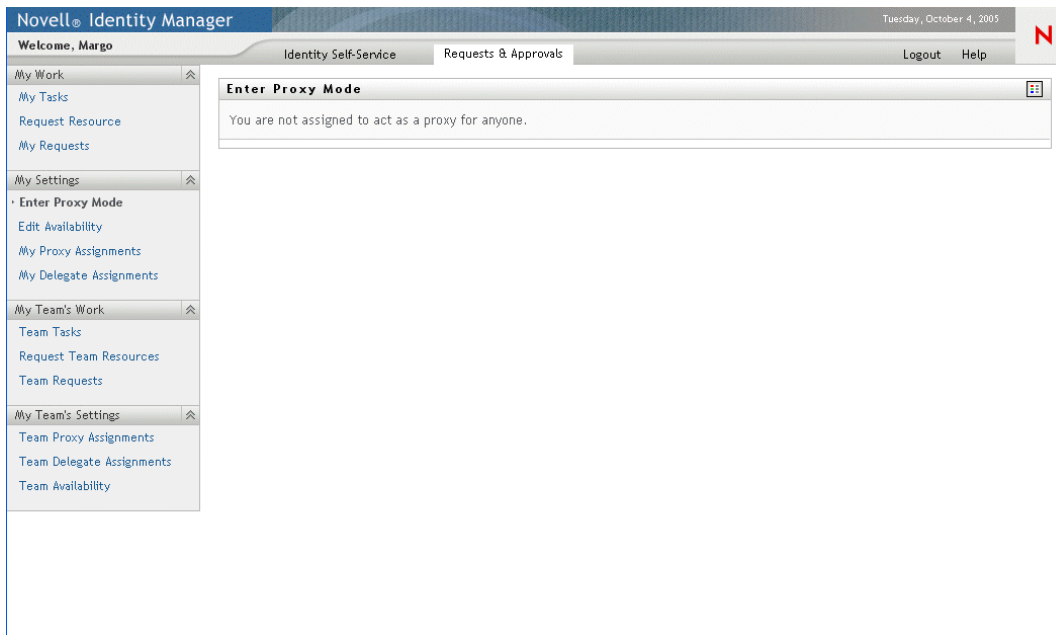
To act as a proxy for another user:

1 Click **Enter Proxy Mode** in the My Settings group of actions.

If you are authorized to act as a proxy for at least one other user, the user application displays a list of users.


If you are not authorized to act as a proxy for any other user, the user application displays this message:

2 Select the user for whom you want to act as proxy and click **Continue**.

NOTE: If you are designated as a proxy for a group or container, you must select the group or container before you can select the user.

The user application refreshes the display and returns you to the My Tasks action, the default action when you log on. The task lists shows tasks assigned to the user for whom you are acting as proxy. A message appears above the My Work group (as well as in the title bar) indicating that you are now acting as a proxy for another user.
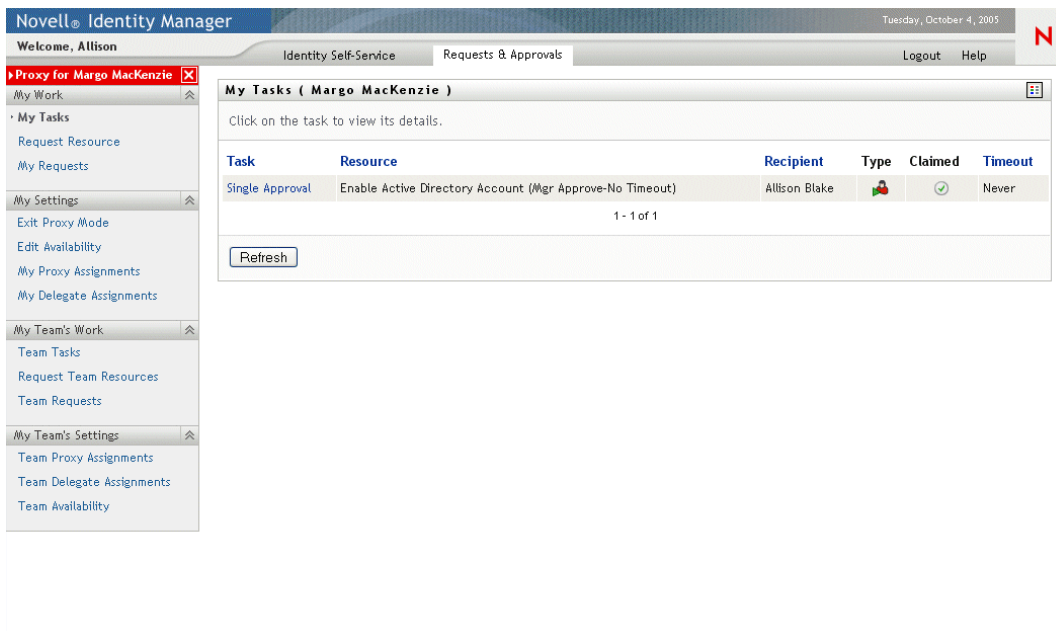
At this point, you are able to perform any action that the user for whom you are acting as proxy could perform. The list of actions you see in the left-hand navigation pane may change, depending on your authority and the authority of the user for whom you are acting as proxy.

10.3 Specifying your availability

The **Edit Availability** action allows you to specify which resource requests with a delegate assignment you are unavailable to work on during a particular time period. During the time period when you are unavailable for a particular request, the user delegated to act on that request can work on it.

If you prefer not to specify your availability for each request definition individually, you can use the Edit Availability action to establish global settings pertaining to delegation.

TIP: Before using the **Edit Availability** action, you need to have at least one delegate assignment to work on. If you're an Organizational Manager, you can create delegate assignments yourself by using the **My Delegate Assignments** action. If you are not a manager, you need to have your manager (or the User Application Administrator) create delegate assignments for you.
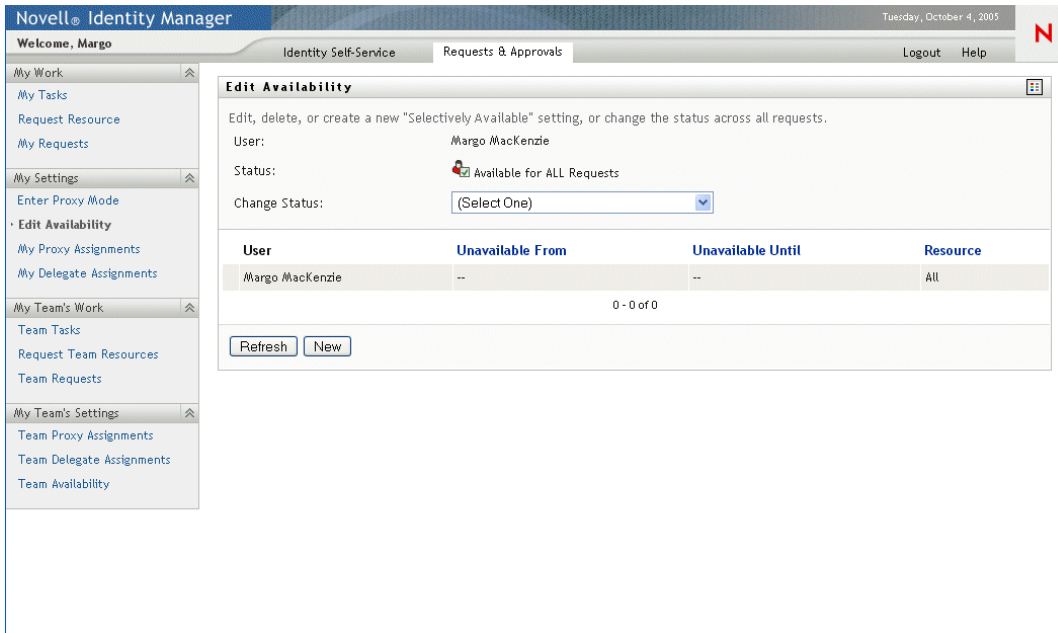
10.3.1 Setting your availability status

To set your availability status:

1 Click **Edit Availability** in the My Settings group of actions.

The user application displays the Edit Availability page. If you do not have any existing availability settings, the display list is empty:

NOTE: If no delegates have been assigned for you, the user application displays a message indicating that you can not change your status on the Edit Availability page.

If you have one or more availability settings, the display list shows these settings:
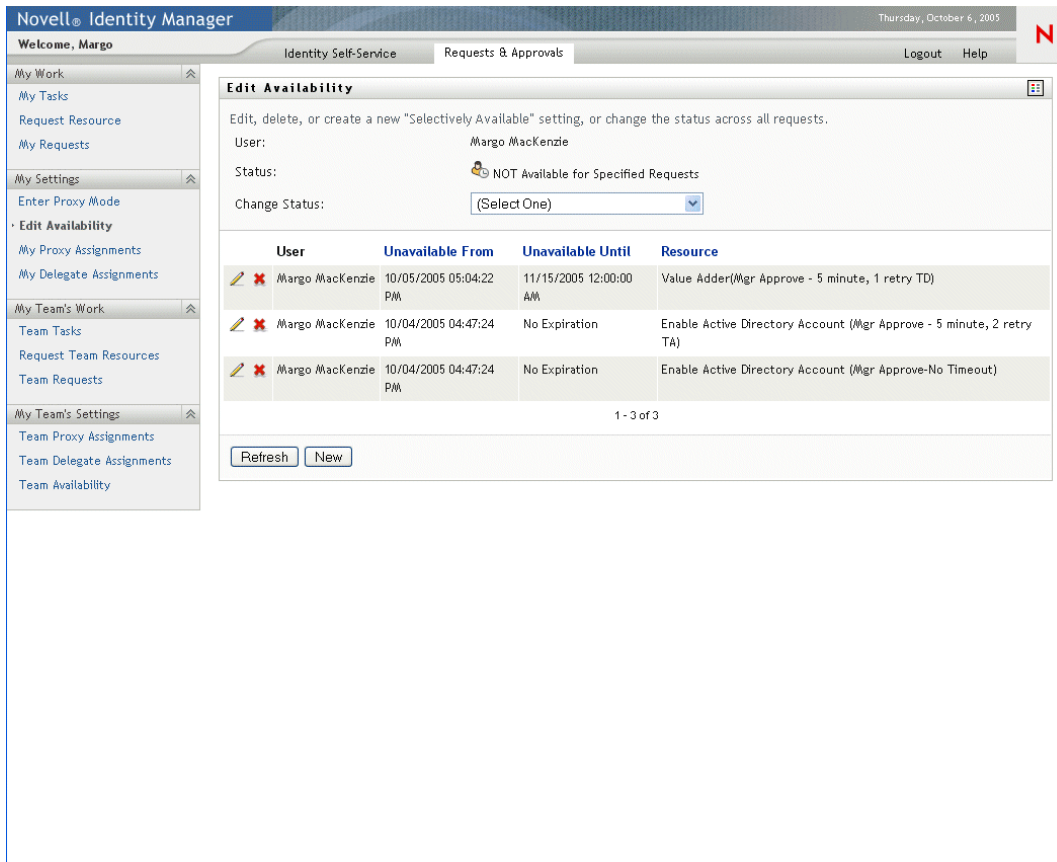
2 Specify your status by selecting one of the following options in the **Change Status** dropdown:

Status	Description
Available for ALL Requests	This is the default status. It indicates that you are globally available. When this status is in effect, requests assigned to you will not be delegated, even if you have assigned delegates.
	NOTE: The Available for ALL Requests status overrides other settings. If you change the status to one of the other settings, and then change it back to Available for ALL Requests, any Selectively Available settings previously defined will be removed.
NOT Available for ANY Requests	Specifies that you are globally unavailable for any request definitions currently in the system.
	Choosing the Not Available for ANY Requests status indicates that you are unavailable for each existing delegate assignment and changes the current status to Not Available for Specified Requests. Assignments are effective immediately until the delegate assignment expires. This setting does not affect availability for new assignments created after this point.

Status	Description
NOT Available for Specified Requests	Specifies that you are not available for certain resource request definitions. During the time period when you are unavailable for a particular request, the user delegated to act on that request can work on it.

The NOT Available for Specified Requests option takes you to the Edit Availability screen. It is the same action as clicking the New button. |

10.3.2 Creating or editing an availability setting

To create or edit an availability setting

1 To create a new availability setting, click **New** (or select NOT Available for Specified Requests in the Change Status dropdown).

2 To edit an existing setting, click the Edit button next to the setting you want to modify:
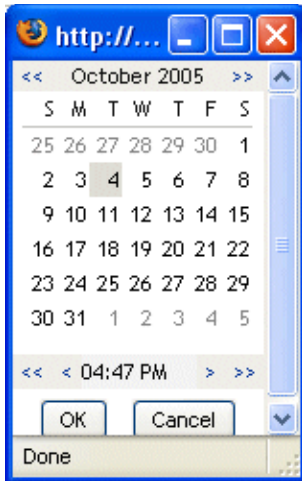
The user application displays a set of controls that allow you to specify the time period for which you will be unavailable and choose the requests to which this setting applies.

NOTE: The list of requests displayed includes only those that have a delegate assignment.

3 Specify the time period during which you will be unavailable:

3a Specify when the time period begins by typing the start date and time in the **Unavailable From** box, or by clicking the calendar button and selecting the date and time.


3b Specify when the time period ends by clicking one of the following radio buttons:

| Radio button	Description
Duration	Lets you specify the time period in weeks, days, or hours.
End date	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.
No Expiration	Indicates that this unavailability setting will not expire.

NOTE: The end date you specify must be within the time period allowed by the delegate assignment. For example, if the delegate assignment expires on October 31, 2005, you can not specify an expiration date of November 15, 2005 for the availability setting. If you specify an expiration date of November 15, 2005, it will automatically be adjusted upon submit to expire on October 31, 2005.

3c Select one or more requests in the **Types of Requests** list box, and click **Add**.

NOTE: On this screen, you select the types of requests that you will **not** accept during the time you are unavailable. This has the effect of delegating these requests to other users.
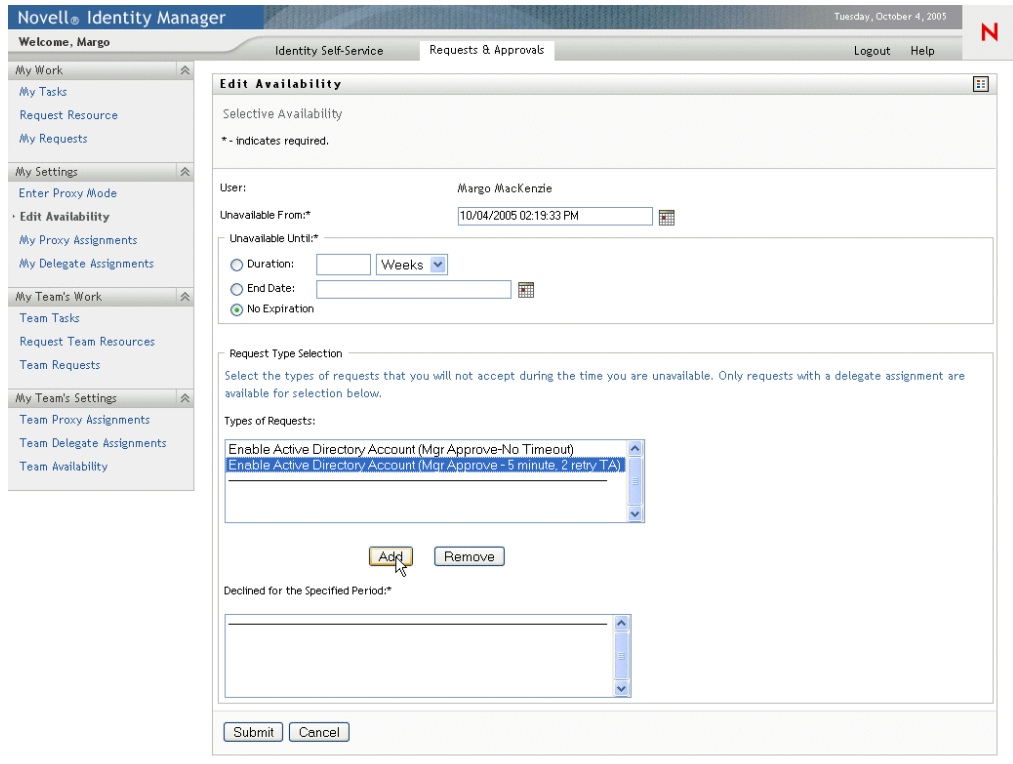
Each request you add is included in the **Declined for the Specified Period** list box.
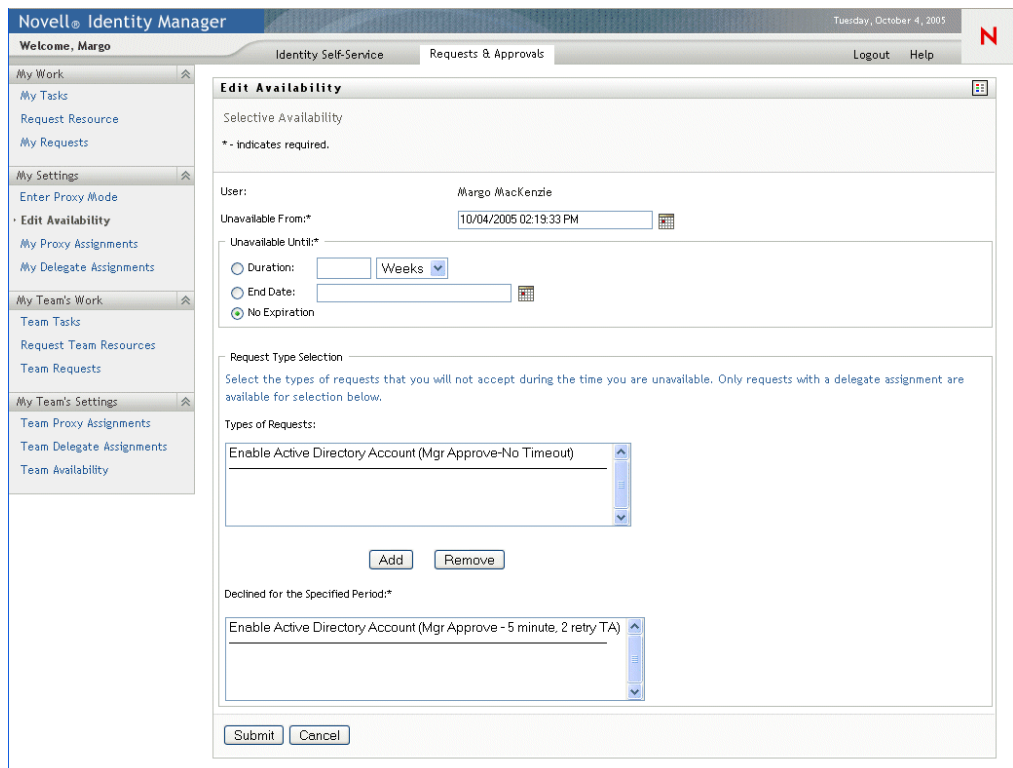
3d To remove a request from the list, click **Remove**.

3e Click **Submit** to commit your changes.

10.3.3 Deleting an availability setting

To delete an existing availability setting:

1 Click the Remove button next to the setting:

10.4 Viewing and editing your proxy assignments

The **My Proxy Assignments** action allows you to view and define proxy assignments. To define proxy assignments, you must have the appropriate authority, as follows:

- The User Application Administrator has the ability to define proxy assignments for any user in the organization.

- An Organizational Manager has the ability to define proxy settings only for users within his scope of authority. The scope of authority is defined as the members of the group that report directly to the manager and the manager himself. The proxies themselves must also be within the manager's scope of authority.

If an Organizational Manager needs to select a proxy who is not within his/her scope, he/she must request that the User Application Administrator (or the Organizational Manager for the desired proxy) define the proxy relationship.

NOTE: Task Group Managers and users without administrative privileges are not permitted to define proxy assignments.

10.4.1 Displaying your proxy settings

To display your proxy settings:

1 Click **My Proxy Assignments** in the My Settings group of actions.

The user application displays your current settings. The proxy assignments displayed are those that specify you as proxy for someone else, as well as those that specify someone else as proxy for you.

If you are not an Organizational Manager or the User Application Administrator, you see a read-only view of your proxy assignments:

If you have administrative privileges, you are provided with a user interface that lets you create and edit proxy assignments.

NOTE: If you are an Organizational Manager, you are not able to edit a proxy assignment that defines you as a proxy for someone outside of your team. Only the User Application Administrator or the user that created this proxy assignment can modify this assignment.

2 To refresh the list, click **Refresh**.

10.4.2 Creating or editing proxy assignments

To create or edit a proxy assignment:

1 To create a new proxy assignment, click **New**.

2 To edit an existing proxy assignment, click the Edit button next to the assignment:

If you are the User Application Administrator, the user application presents this interface to allow you to define proxy assignments:
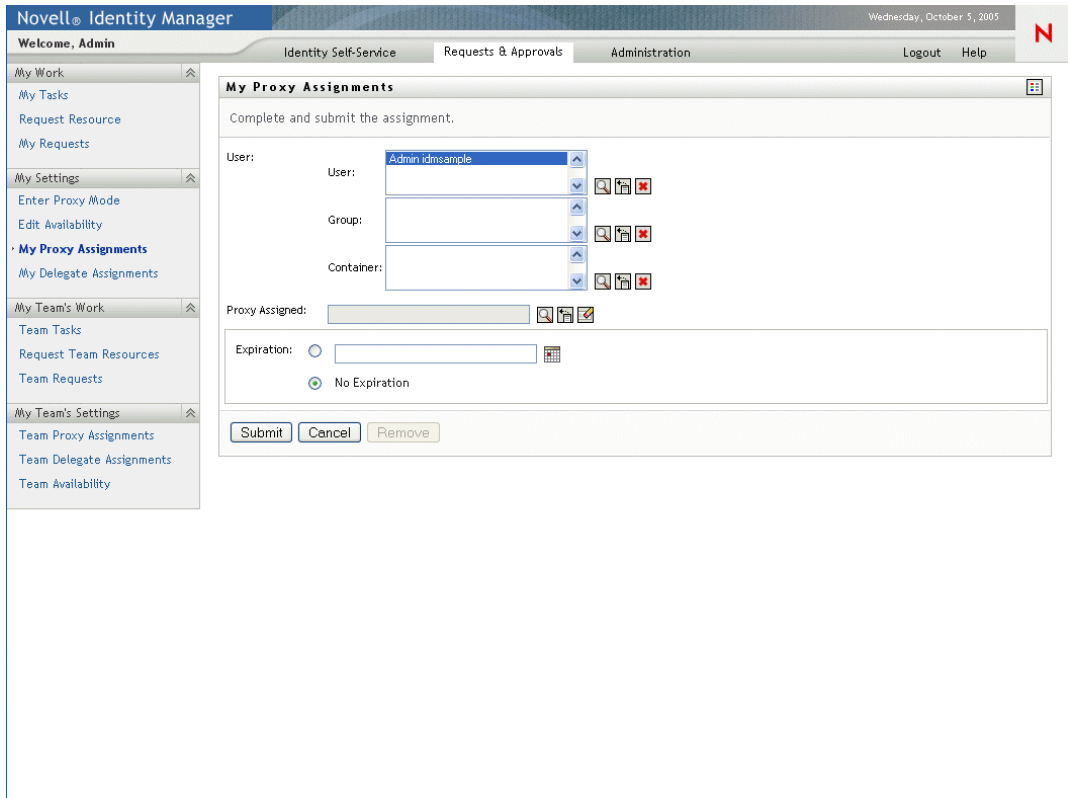
If you are an Organizational Manager, the user application presents this user interface:
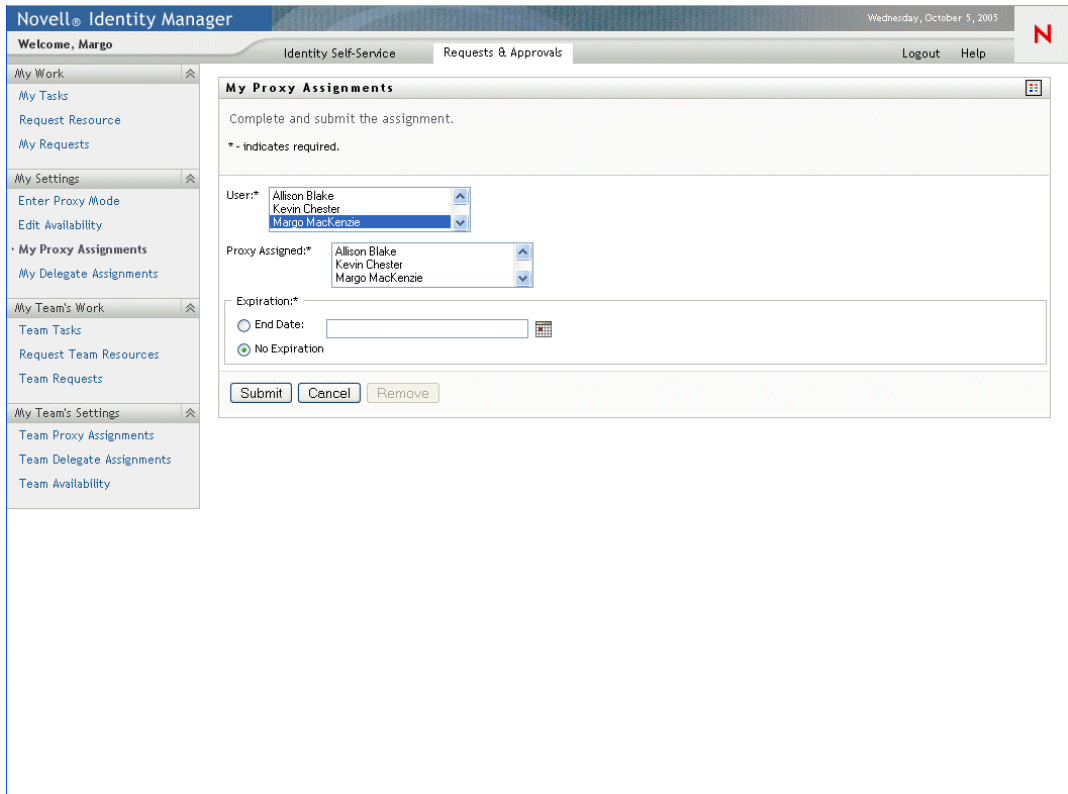
3 If you are the User Application Administrator, select one or more users, groups, and containers for which you want to define a proxy.

Use the Object Selector or the Show History tool to select a user, group, or container.

4 If you are an Organizational Manager, select one or more users for whom you want to define a proxy.

5 Specify the user who will be the proxy in the Proxy Assigned field.

6 Specify when the time period ends by clicking one of the following radio buttons:

Radio button	Description
End date	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.
No Expiration	Indicates that this proxy assignment will not expire.

7 Click **Submit** to commit your changes.

10.4.3 Deleting proxy assignments

To delete an existing proxy assignment:

1 Click the Remove button next to the assignment:

10.5 Viewing and editing your delegate assignments

The **My Delegate Assignments** action allows you to view and define delegate assignments. To define delegate assignments, you must have the appropriate authority, as follows:

- The User Application Administrator has the ability to define delegate assignments for any user in the organization.

- An Organizational Manager has the ability to define delegate settings only for users within his scope of authority. The scope of authority is defined as the members of the group that report directly to the manager and the manager himself. The delegates themselves must also be within the manager's scope of authority.

If an Organizational Manager needs to select a delegate who is not within his/her scope, he/she must request that the User Application Administrator (or the Organizational Manager for the desired delegate) define the delegate relationship.

NOTE: Task Group Managers and users without administrative privileges are not permitted to define delegate assignments.

TIP: Before using the **Edit Availability** action, you need to have at least one delegate assignment to work on. If you're a manager, you can create delegate assignments yourself by using the **My**

Delegate Assignments action. If you are not a manager, you need to have your manager (or the User Application Administrator) create delegate assignments for you.
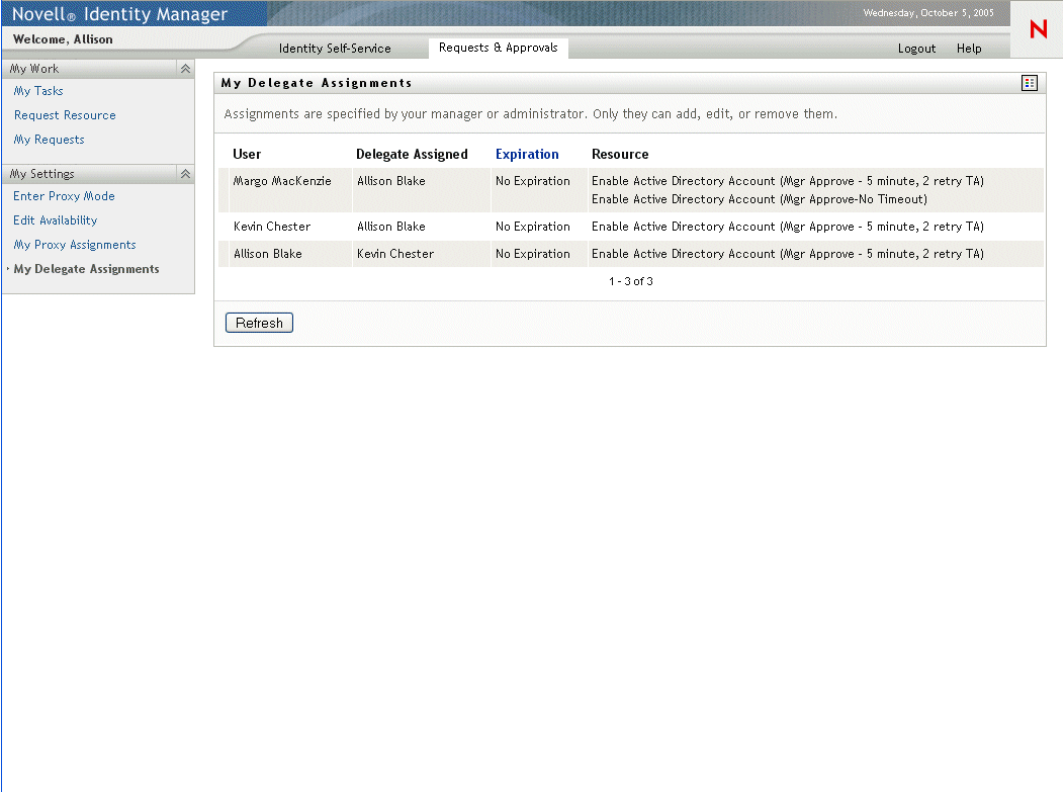
10.5.1 Displaying your delegate settings

To display your delegate settings:

1 Click **My Delegate Assignments** in the My Settings group of actions.

The user application displays your current settings.

If you are not an Organizational Manager or the User Application Administrator, you see a read-only view of your delegate assignments:

If you have administrative privileges, you are provided with a user interface that lets you create and edit delegate assignments.

2 To refresh the list, click **Refresh**.

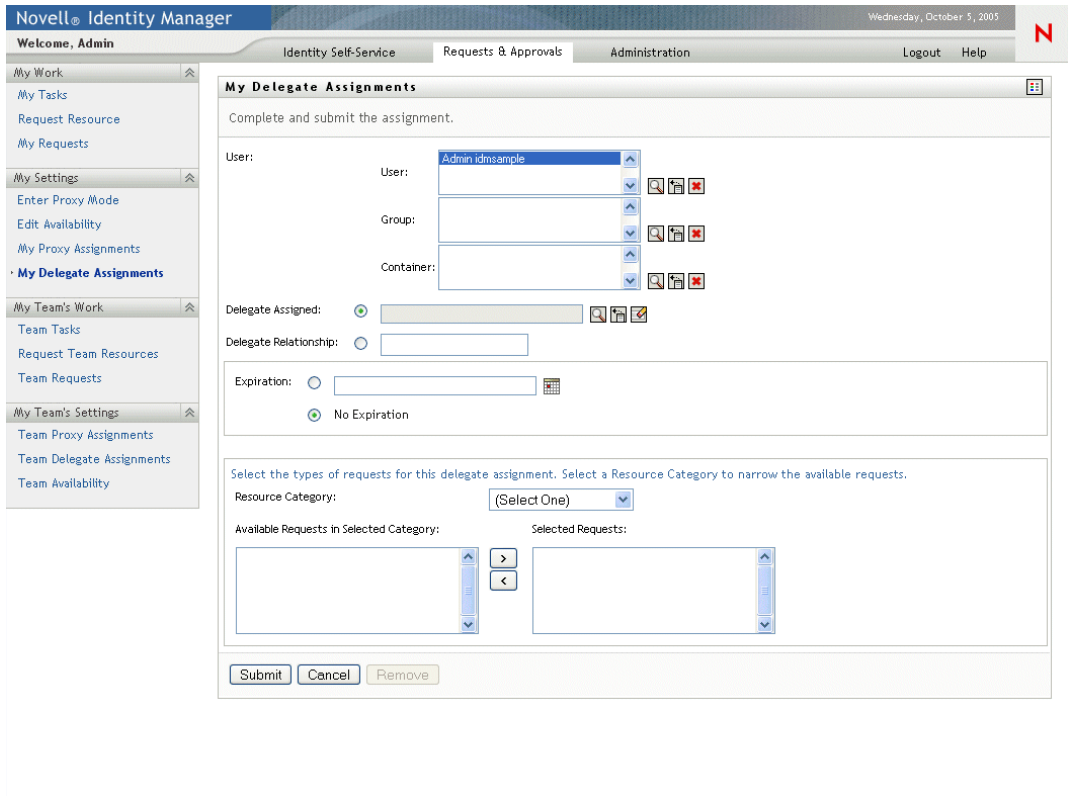## 10.5.2 Creating or editing delegate assignments

To create or edit a delegate assignment:

1 To edit an existing delegate assignment, click the Edit button next to the assignment:

2 To create a new delegate assignment, click **New**.

If you are the User Application Administrator, the user application presents this interface to allow you to define delegate assignments:

If you are an Organizational Manager, the user application presents this user interface:

3 If you are the User Application Administrator, select one or more users, groups, and containers for which you want to define a delegate.

TIP: Use the Object Selector or the Show History tool to select a user, group, or container.

4 If you are an Organizational Manager, select one or more users for whom you want to define a delegate.

5 Specify the user who will be the delegate in the **Delegate Assigned** field. Alternatively, specify a relationship in the **Delegate Relationship** field.

To specify a delegate relationship, you need to type the LDAP name of a user object attribute that resolves to a Distinguished name, for example, `manager`. This is an advanced feature and should only be used by those familiar with the identity vault schema.

6 Specify when the time period ends by clicking one of the following radio buttons:

Radio button	Description
End date	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.
No Expiration	Indicates that this delegate assignment will not expire.

7 Select the category of resource requests in the **Resource Category** field.

8 Select one or more requests that you would like to delegate in the **Available Requests in Selected Category** list box, and click **Add**.

Each request you add is included in the **Selected Requests** list box.

If you add multiple requests, each request is treated as an individual object that can be edited separately.

9 To remove a request from the list, click **Remove**.

10 Click **Submit** to commit your changes.

The user application displays a confirmation message indicating whether the delegate assignment was successfully submitted:

10.5.3 Deleting a delegate assignment

To delete an existing delegate assignment:

1 Click the Remove button next to the assignment:

Managing Your Team's Work 11

This chapter describes how to use the Requests & Approvals tab to manage your team's provisioning work. Topics include:

11.1 About My Team's Work actions

The Requests & Approvals tab in the Identity Manager user application includes a group of actions called **My Team's Work**. The My Team's Work actions give you the ability to work with group and team member tasks and requests in a workflow. Some actions are the same as those described in Chapter 9, "Managing Your Work," on page 103.

Actions are available according to your role, as follows:

Action	Organizational Manager	Task Group Manager	User Application Administrator
View tasks assigned to a task group	No	Yes	Yes
View tasks assigned to team members	Yes	No	Yes
View tasks assigned to a group (non-task group)	No	No	Yes
Reassign team member tasks to other team members	Yes	No	Yes
Reassign tasks to task groups	No	No	Yes
Reassign tasks to groups	No	No	Yes
Release tasks	Yes	Yes	Yes
Request resources for team members	Yes	No	Yes
Request resources for groups (if multiple recipients are allowed)	No	No	Yes
Request resources for containers (if multiple recipients are allowed)	No	No	Yes
View resource requests and status	Yes	No	Yes
Retract resource requests	Yes	No	Yes

NOTE: The Requests & Approvals tab works with existing users and groups. To add new users and groups, refer to Chapter 7, "Creating Users or Groups," on page 81.

11.2 Managing your team's tasks

When a task is in a workflow queue, you can perform the following actions, as your role permits:

- View the task.
- Claim an unclaimed task and begin working on it.
- Reassign the task to another user or group.
- Release the task. It can then be reassigned or claimed by another team member.

11.2.1 Viewing tasks

View tasks by task group, team member, or group.

Viewing tasks by task group

Task Managers and User Application Administrators can view tasks by task group.

To see the tasks that have been assigned to a task group:

1 Click **Team Tasks** in the My Team's Work group of actions.

2 If a **Task Group** radio button is present, click it to select Task Group. In the example that follows, Jack sees Task Group because he is a Task GroupManager, and he sees Team Member because he is also an Organizational Manager.
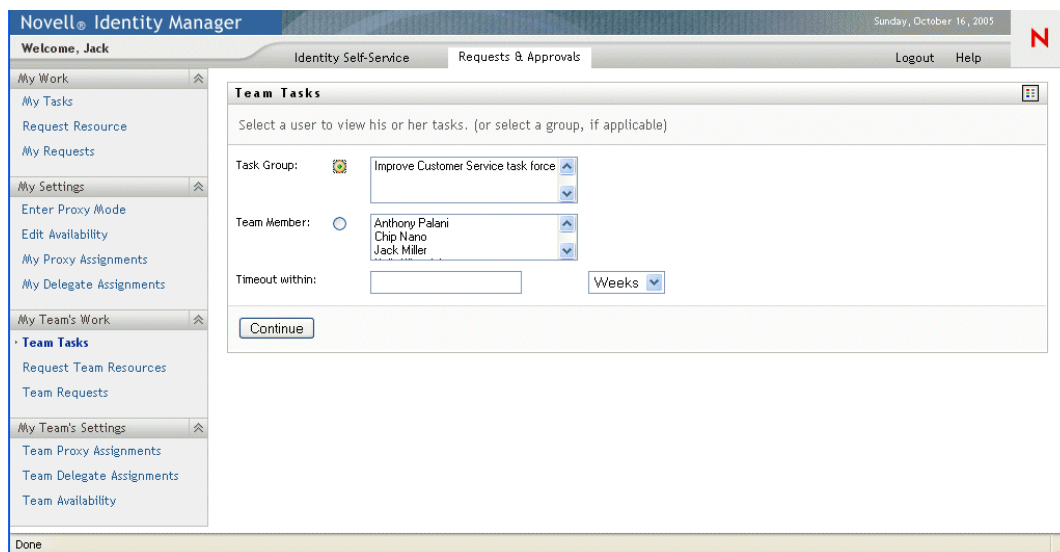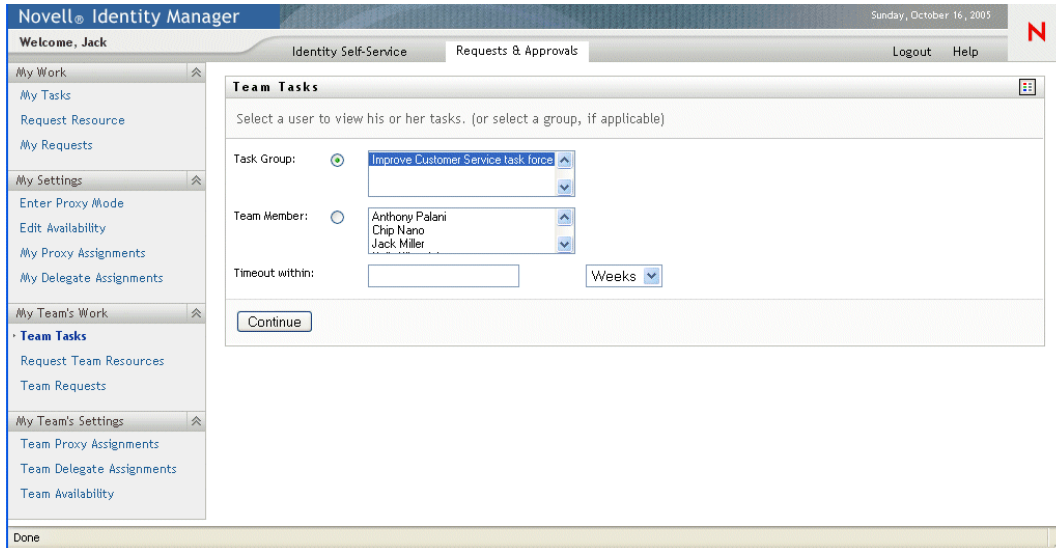

3 If you are a Task Group Manager, click a task group name to select it.

If you are a User Application Administrator, you see a Select Object icon 🔍 beside the Task Group selection box. Click the icon. Optionally specify search criteria for finding the name of the task group and click **Search**, or select a group from the list in the Object Selector window. (By default, all task groups are displayed in the Object Selector window.)
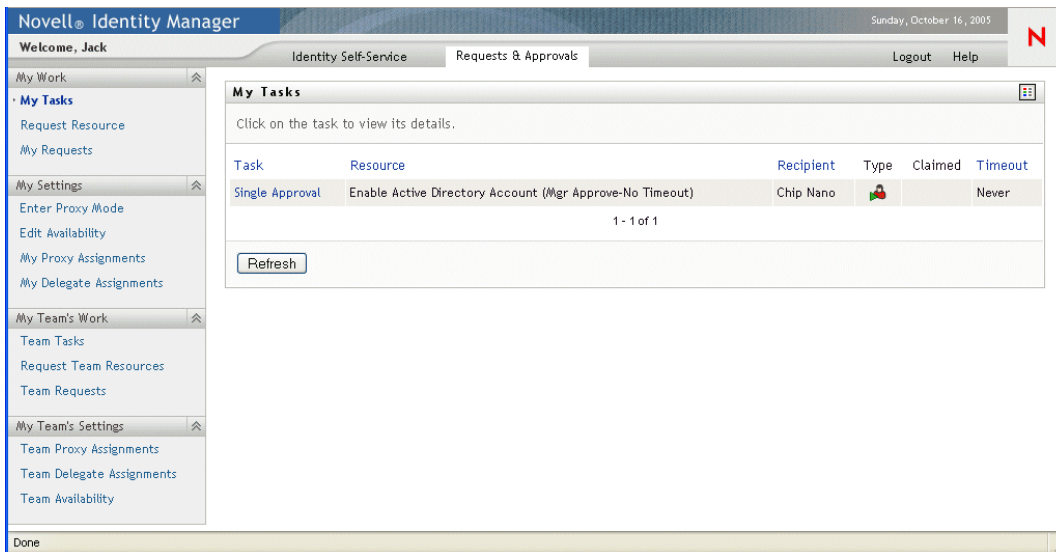
4 Optionally, in the Team Tasks window, specify a **Timeout within** interval to find tasks that expire ("time out") within the time you choose. Enter one or more digits and select weeks, days, or hours. For example, you could enter 10 and choose Days.

5 Click **Continue.**

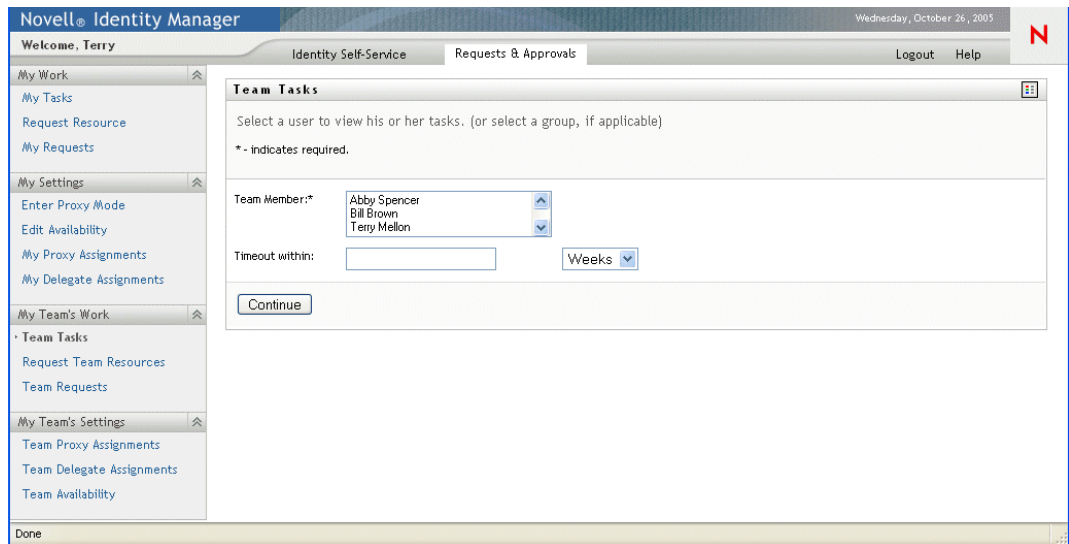**6** The tasks in the task group's queue are displayed.

Viewing tasks by team member

Organizational Managers and User Application Administrators can view tasks by team member.

To see the tasks that have been assigned to a team member:

1 Click **Team Tasks** in the My Team's Work group of actions. You will see the Team Tasks window.

2 If the Team Member radio button is present, click it to select Team Member.

3 If you are an Organizational Manager, click a Team Member name to select it.

If you are a User Application Administrator, you see an Object Selector icon 🔍 beside the Team Member selection box. Click the icon to open the Object Selector window. Specify search criteria for the team member, click **Search,** and choose the team member.

4 Optionally, in the Team Tasks window, specify a **Timeout within** interval to find tasks that expire within the time you choose. Enter one or more digits and select weeks, days, or hours. For example, you could enter 10 and choose Days.

5 Click **Continue.**
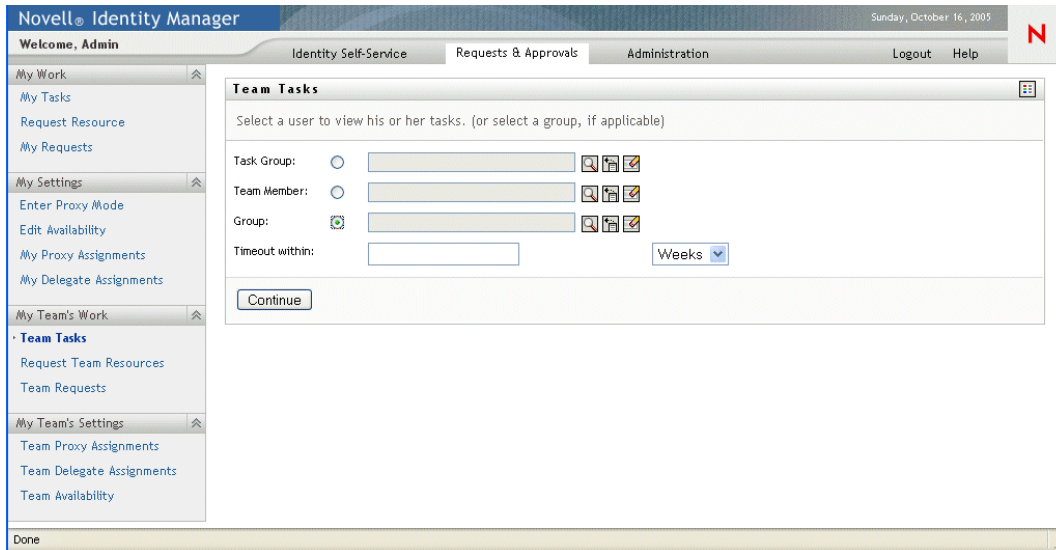
The tasks in the team member's queue are displayed.
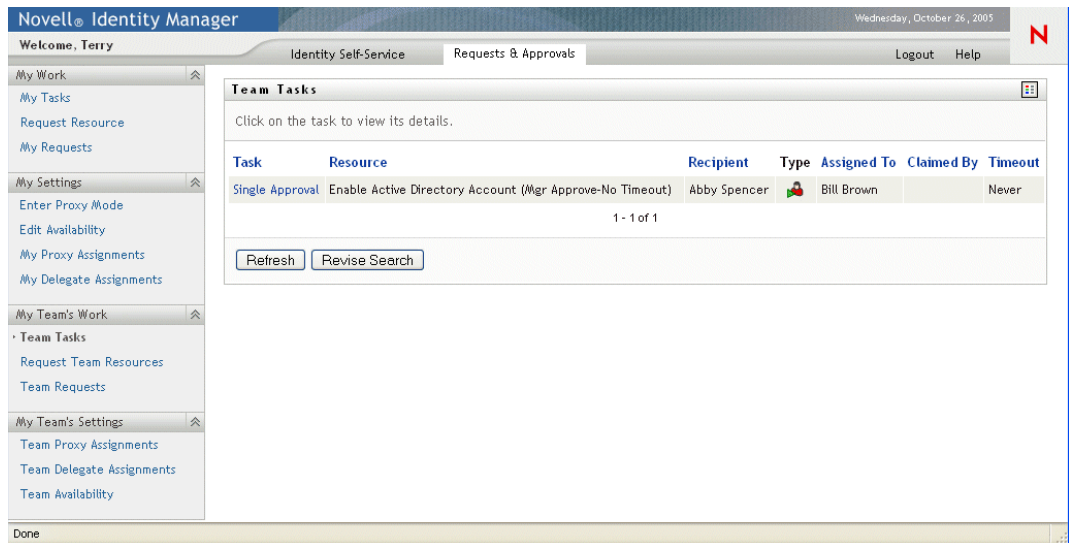
Viewing tasks by group

The User Application Administrator can view tasks by group.

To see the tasks that have been assigned to a group:

1 Click **Team Tasks** in the My Team's Work group of actions.

2 Click the Group radio button.

3 Click the Object Selector icon. You can optionally specify search criteria for finding the name of the task group and click **Search**, or select a group from the list in the Object Selector window. (By default, all task groups and organizational groups are displayed in the Object Selector window.)

4 Click a group name to select it.
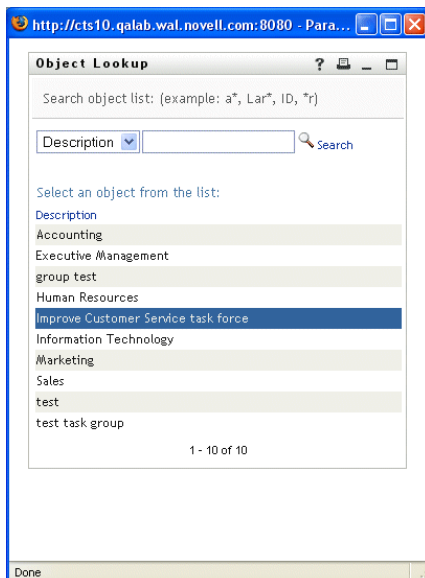
5 Optionally, specify a **Timeout within** interval to find only those tasks that expire ("time out") within the interval you set. Enter one or more digits and select weeks, days, or hours. For example, you could enter 10 and choose Days.

6 Click Continue.
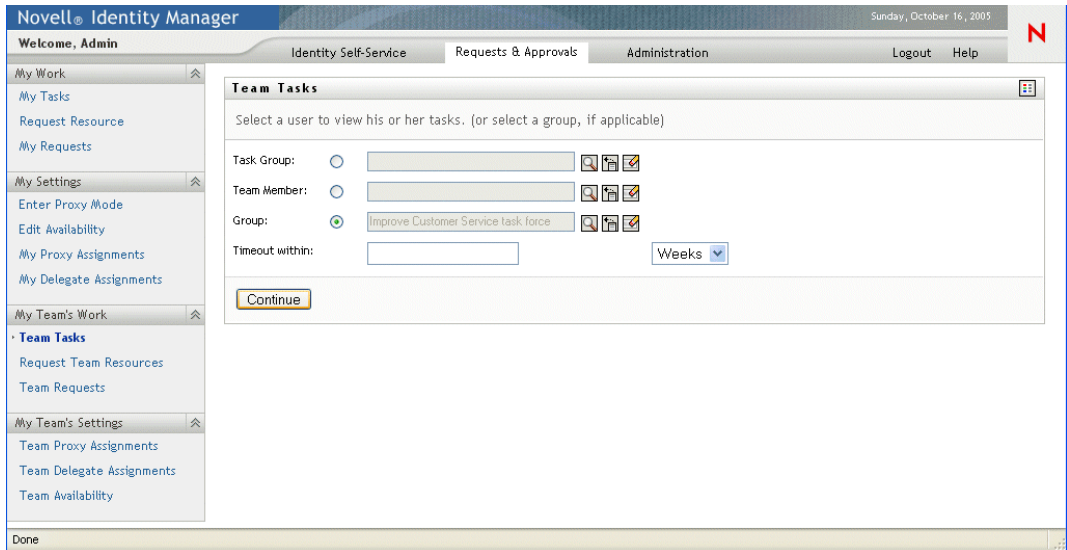
The list of tasks in the task group's queue is displayed.
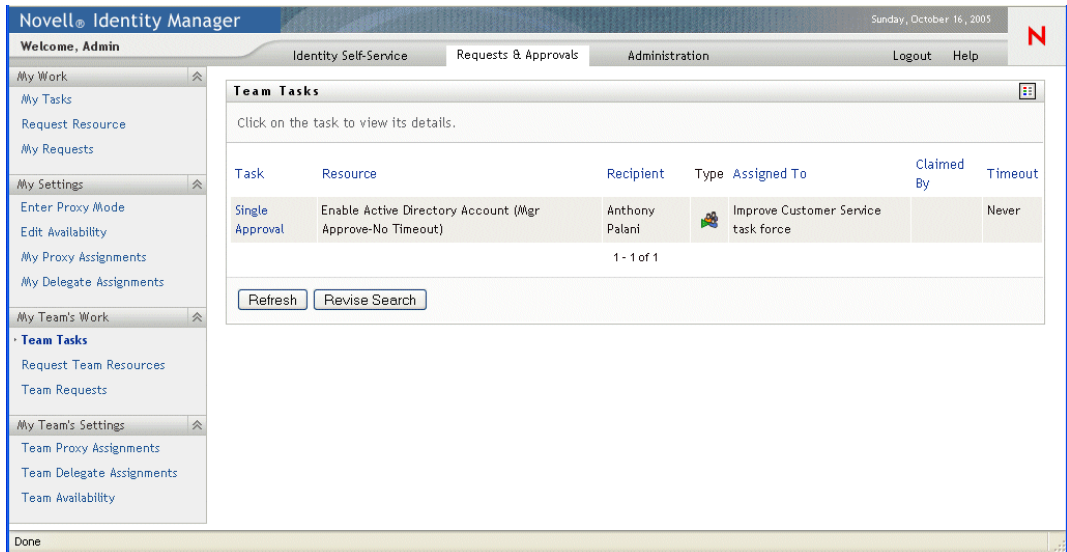
11.2.2 Selecting a task

To select a task in the queue list:

1 Click on the name of the task in the queue.
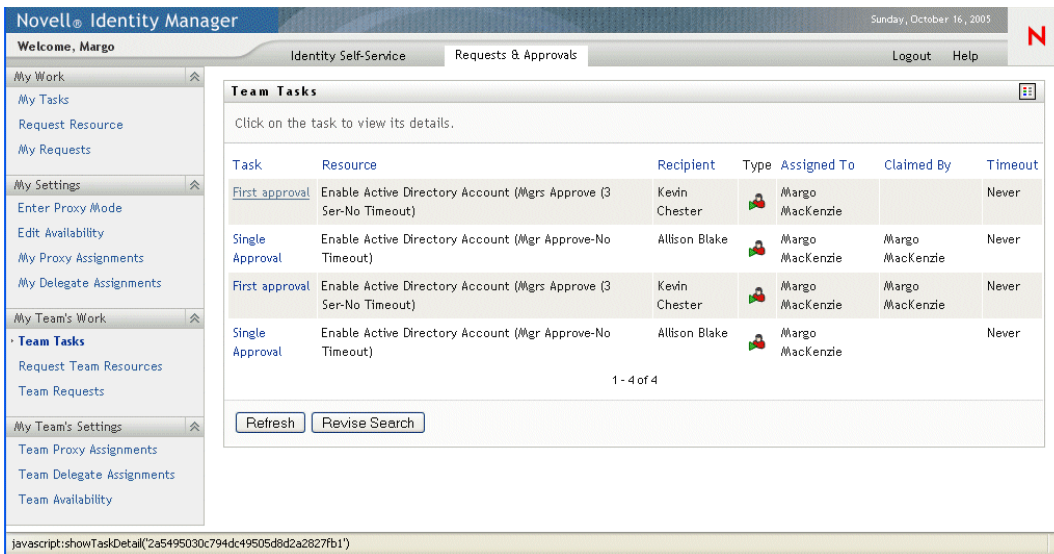
The Team Tasks Task Detail form is displayed.
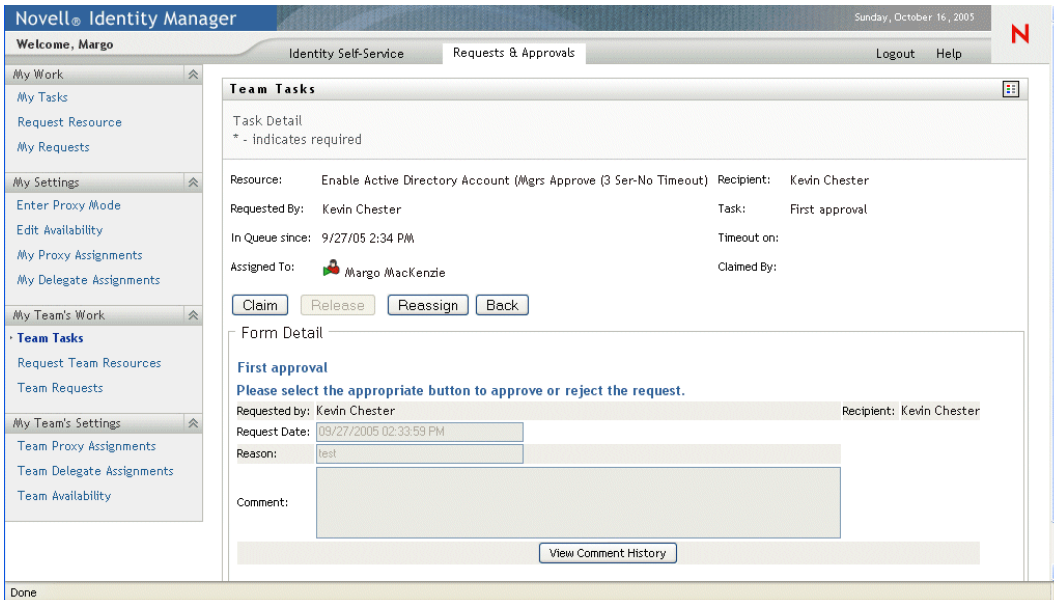
2 To claim a task, follow the instructions at Section 9.2.3, "Claiming a task," on page 105.

3 To return to the task list, click **Back**.

11.2.3 Reassigning a task (for the User Application Administrator)

This section details how the User Application Administrator reassigns tasks. Organizational Managers can follow the instructions at Section 9.2.4, "Reassigning a task," on page 107.

To reassign a task:

1 Click Reassign in the Team Tasks task detail window.
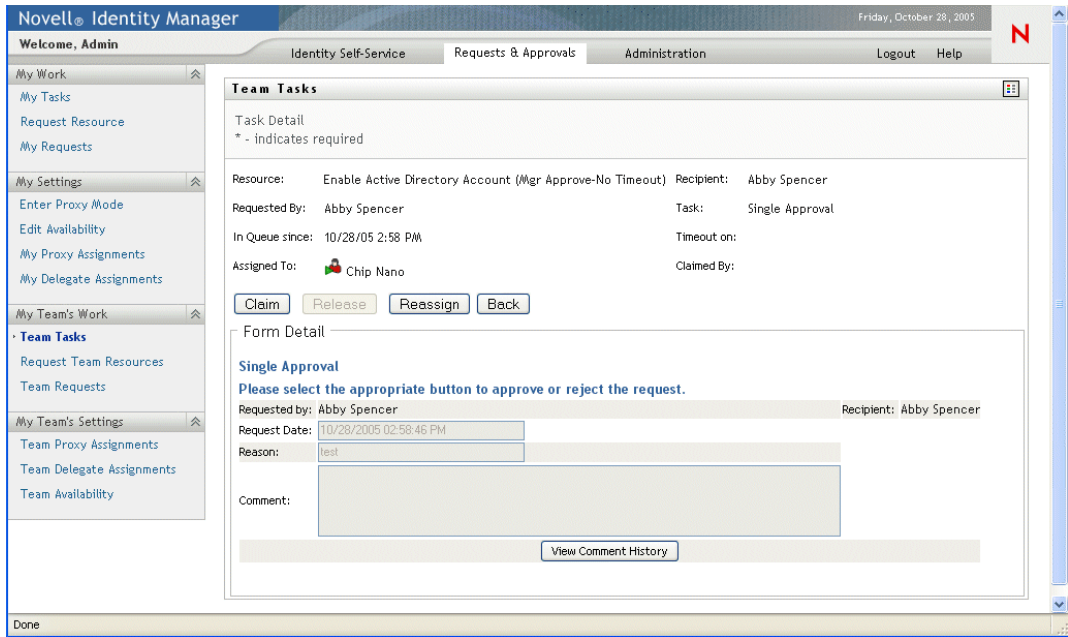
2 Choose to reassign to a user (team member) or a group.
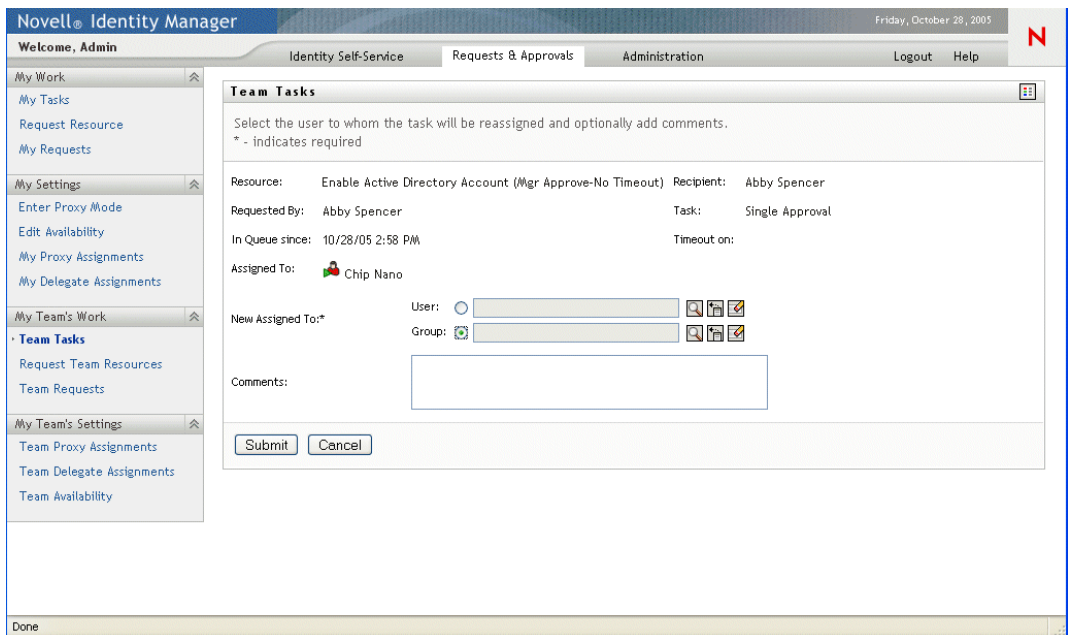
3 Click the Object Selector icon ![icon] beside your chosen entry box.

4 Select the user or group to which to reassign the task. When you choose Groups, all groups are listed, by default.

5 Optionally type a comment to explain the reason for the reassignment in the **Comments** field.

6 Click **Submit**.

The user application displays a message indicating whether the action was successful.

11.2.4 Releasing a task

Release a task so that it can be assigned to or claimed by another team member.

To release a task:

1 Click **Release** in the Team Tasks Task Detail window.
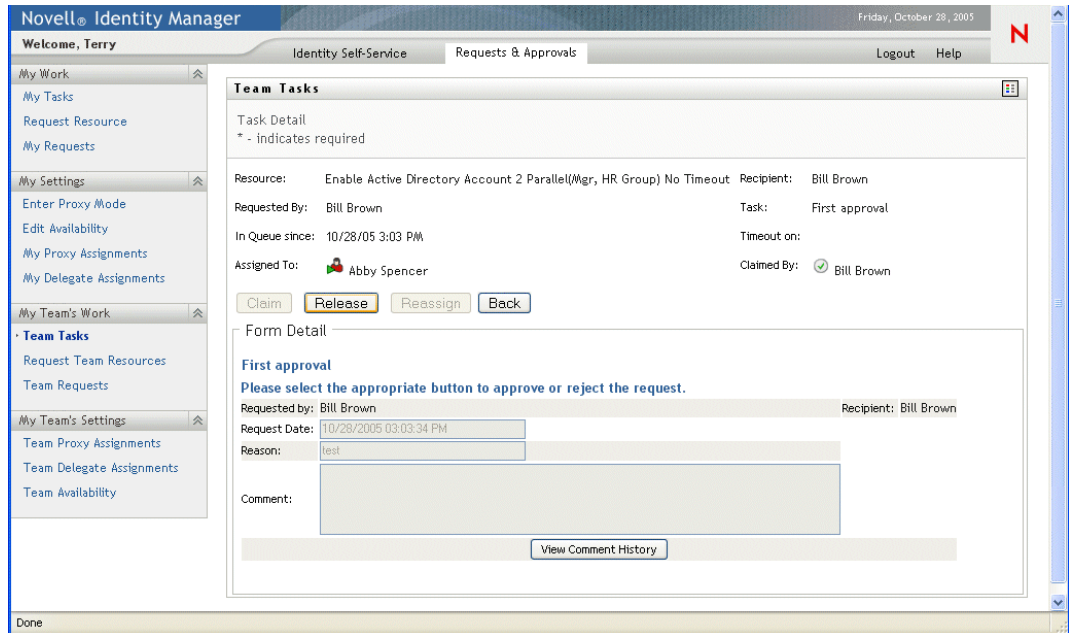
11.3 Requesting resources for teams

The **Request Team Resources** action enables you to request resources for groups or team members:

- The User Application Administrator can request resources for team members and – if multiple selections are allowed for a resource – groups and containers.
- The Organizational Manager can request resources for team members.

To request a resource:

1 Click **Request Team Resources** in the My Team's Work group of actions.

The Request Team Resources page is displayed.
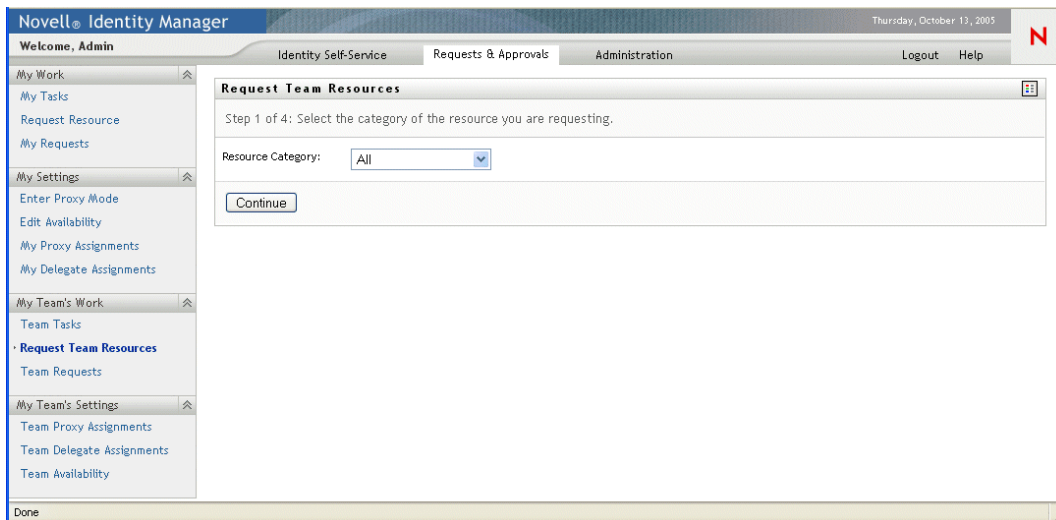
2 Select the category of resource.

3 Click **Continue**.

The Request Team Resources page displays a list of resources that you can request.
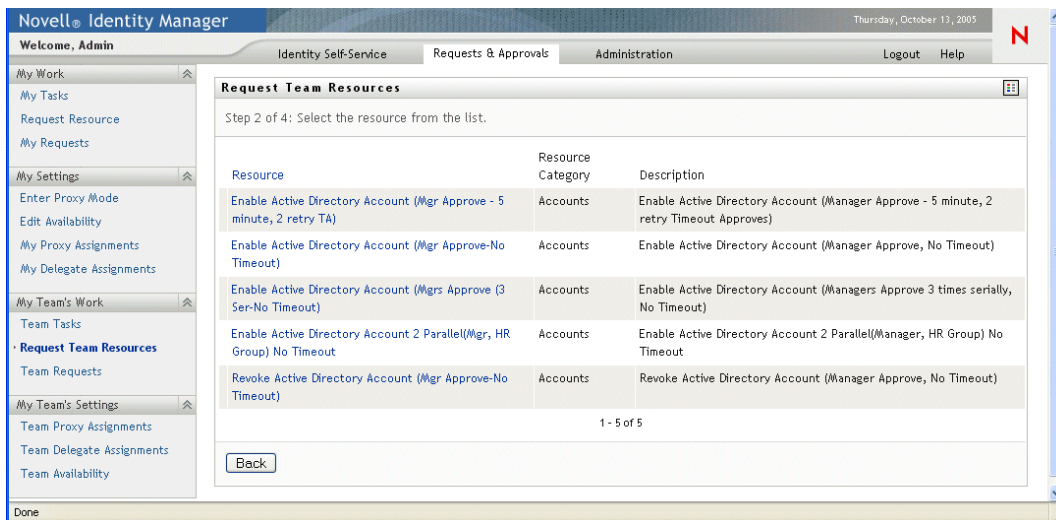
4 Click a resource name to select it. The Request Team Resources page appears. Choose a team member to receive the resource. If you are the User Application Administrator, click the Object Selection icon to search for and select a team member name.

5 Click **Continue**.

6 The Request Team Resources page displays the request form. Fill in the fields on the request form. In the following example, the only required field is **Reason for request**.

NOTE: The fields on the form will vary depending on which resource you requested.
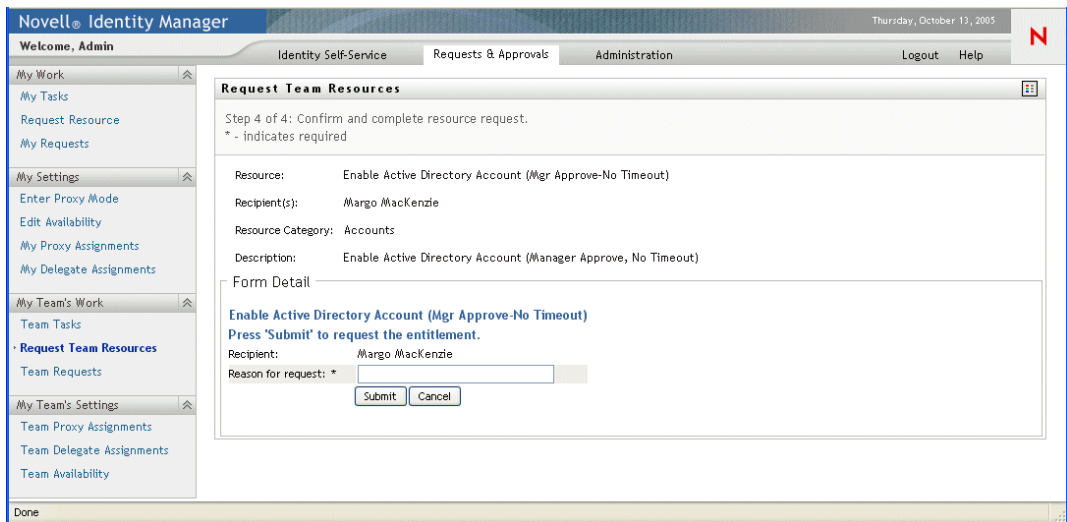
7 Click **Submit**.

A workflow starts for the user.

The Request Team Resources page displays a status message indicating whether the request was submitted successfully.
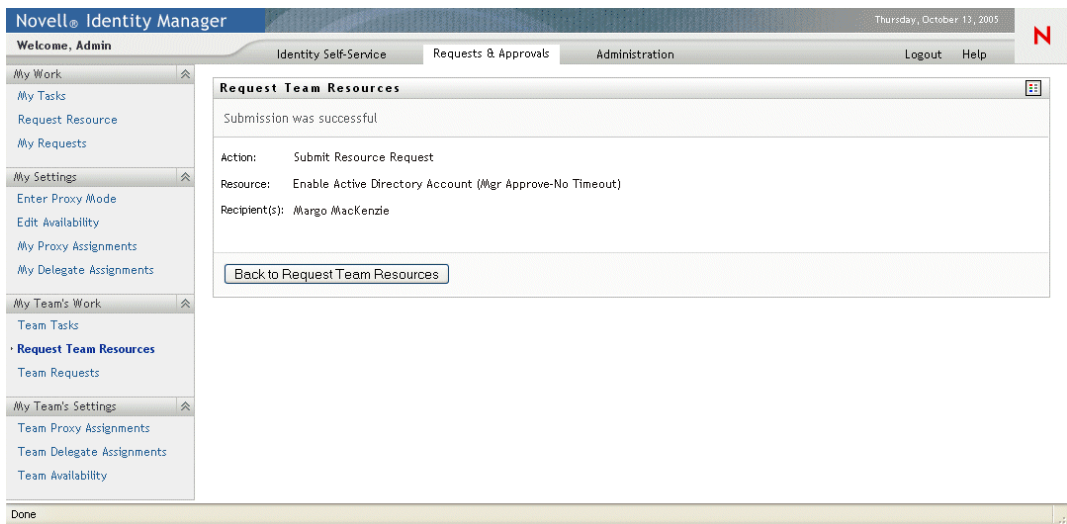
If your request requires permission from one or more individuals in an organization, the request starts a workflow to obtain those approvals. See Chapter 8, "Introducing the Requests & Approvals Tab," on page 95 for details about workflows.

11.4 Managing your team's requests

The Organizational Manager and User Application Administrator can view status and history of resource requests and retract resource requests.

To view a list of requests for a team member:

1 Click **Team Requests** in the My Team's Work group of actions.

The Team Requests page prompts you to select a Team Member, a Resource Category (optionally), and a Request Date filter.

If you are an Organizational Manager, select a team member from the list box.

Or, if you are the User Application Administrator, click the selection icon and search for and select a team member.

2 After you select a team member, you can optionally select a Resource Category and a Request Date filter. Click **continue**.

The Team Requests page lists:

- Each requested resource
- Who is to receive it
- Who requested it
- Status of the request
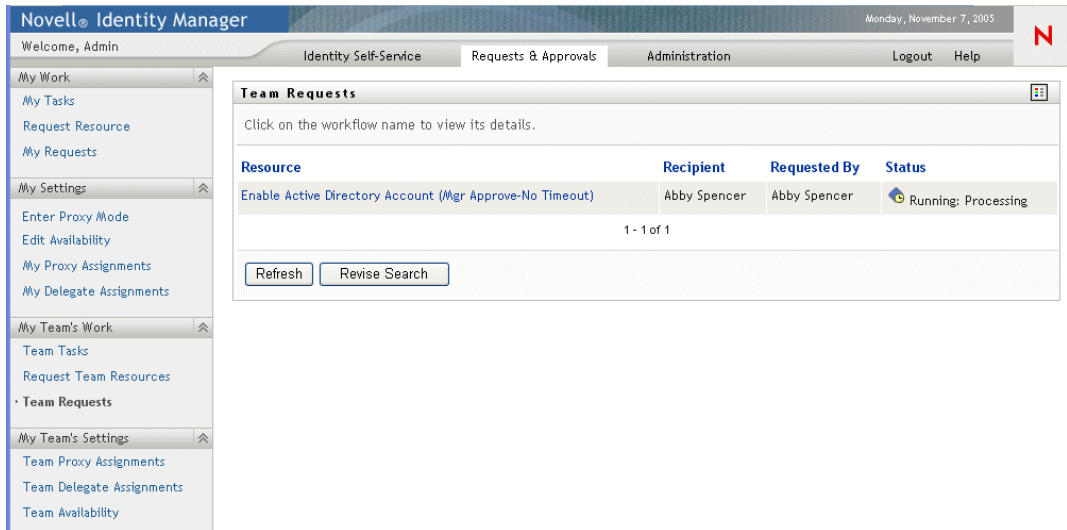
3 To view the details of a resource request, click the request name in the list.

The Request Detail page displays details such as

- Name of resource
- Recipient of resource
- Status of activities supporting the request
- Who requested the resource
- When the request was made
- Comments
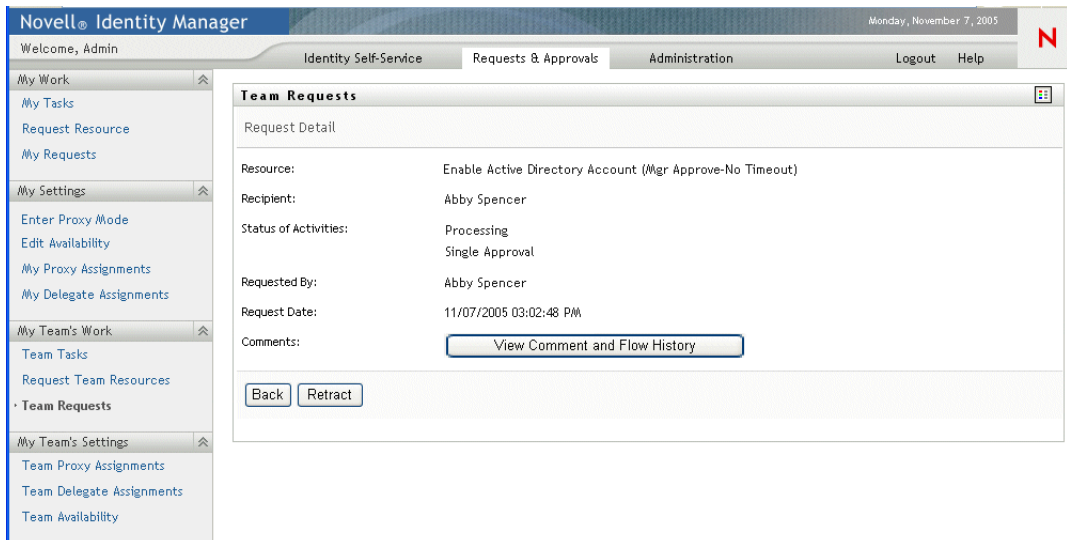
4 Click **View Comment and Flow History** in the Request Detail page to see the history of the workflow and comments made at each stage of processing.
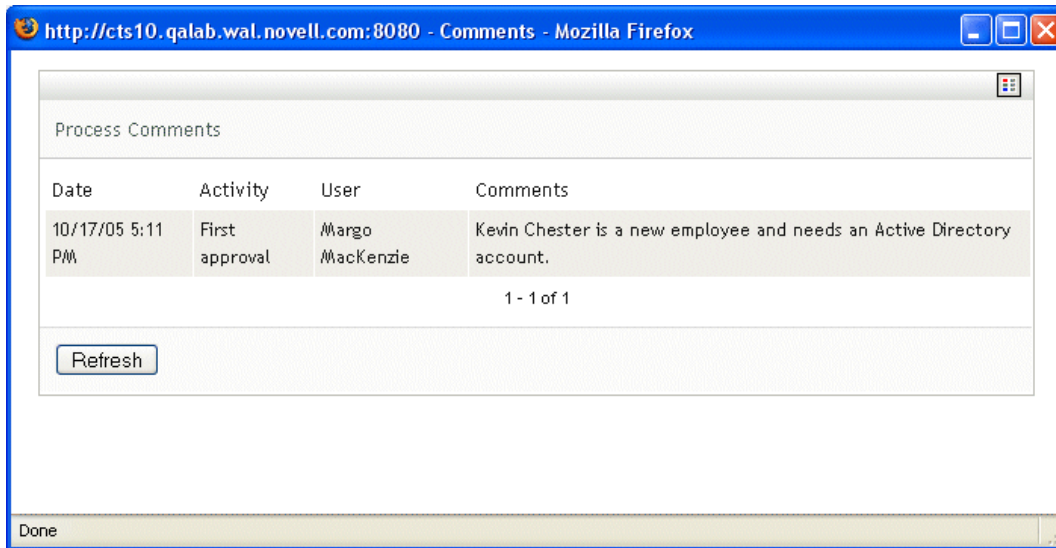
5 To retract the request, click **Retract** in the Request Detail page. Retract is enabled for running processes. In processes that are no longer running, Retract is disabled.

Configuring Your Team's Provisioning Settings

12

This chapter tells you how to use the **My Team's Settings** actions on the **Requests & Approvals tab** of the Identity Manager user interface. Topics include:

12.1 About the My Team's Settings actions

The Requests & Approvals tab in the Identity Manager user application includes a group of actions called **My Team's Settings**. The **My Team's Settings** actions lets you:

- Create, view, and modify the current proxy assignments for your team.
- Create, view, and modify the current delegate assignments for your team.
- Define and view team member's availability for delegate assignments.

12.2 Viewing and editing your team's proxy assignments

The **Team Proxy Assignments** action lets you manage the proxy assignment for any of your team members (including yourself). The rules for defining proxies are:

- You, as the Organizational Manager, are allowed to define proxies for yourself and for the members of the group that report directly to you.
- The people that you specify as proxies must also be within your team.
- If you need to assign a proxy who is not a member of your team, you must request the User Application Administrator to define it. The User Application Administrator has the ability to create proxy assignments for any user, group, or container in the organization.

NOTE: Task Group Managers and users without administrative privileges are not permitted to define proxies.

To assign a proxy for a team member:

1 Click **Team Proxy Assignments** in the My Team's Settings group of actions.
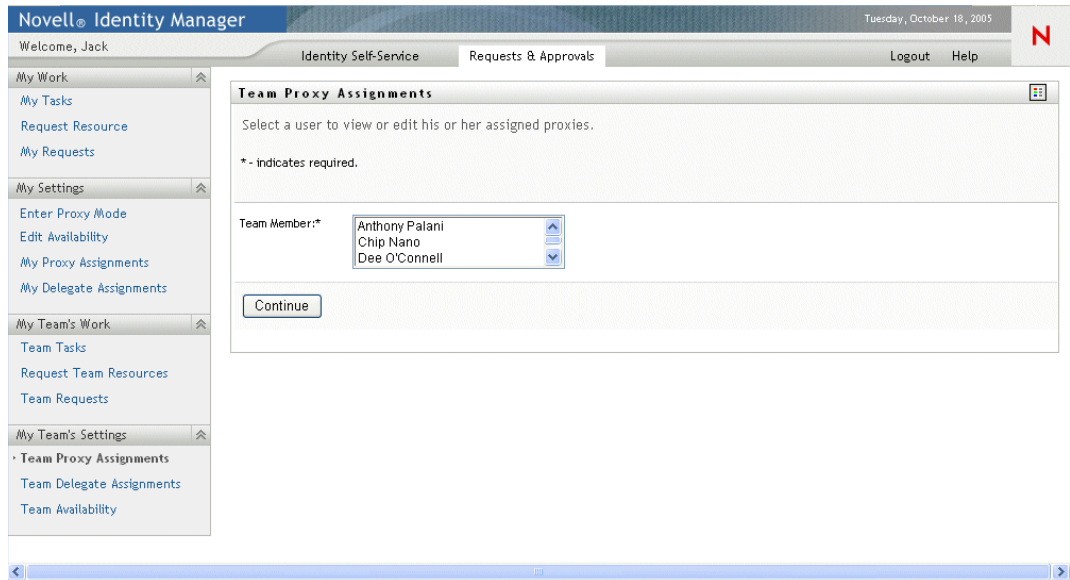
2 Choose a Team Member from the list, and click **Continue**.
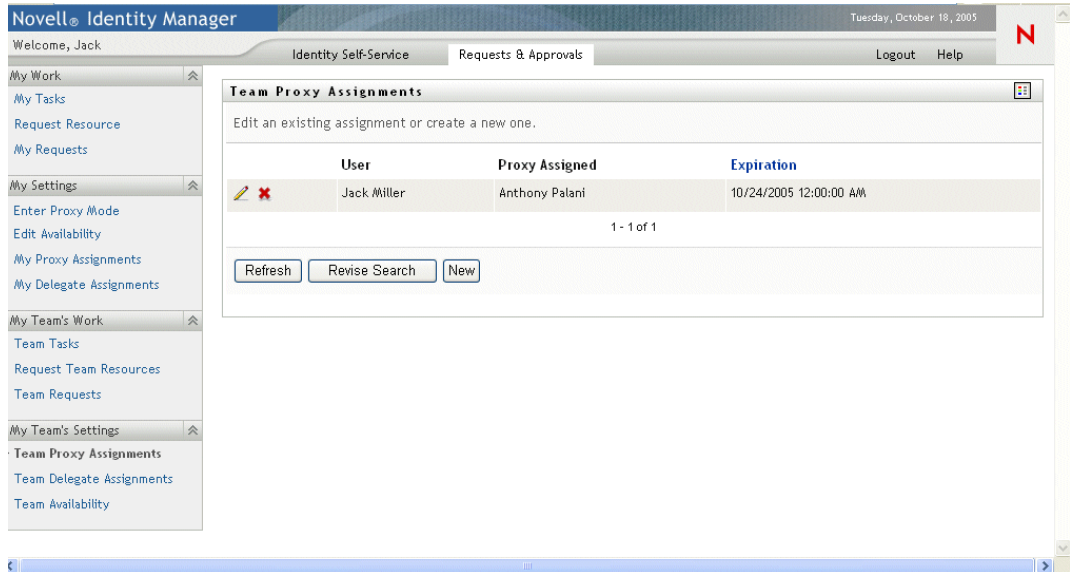
The proxy assignments for the selected team member, if any, are displayed.

3 Click **New**.

4 Complete the panel as follows:

Field	What to do
User	Select the team member for whom you want to assign a proxy. You can select multiple users.
Proxy Assigned	Select the team member that will act as proxy.

Field	What to do
Expiration	• **End Date**—Click the Calendar and choose a date and time when the proxy assignment expires. • **No Expiration**—Choose No Expiration if you want the proxy assignment to remain in effect until it is removed or modified.

5 Click **Submit** to save your selections.

If the assignment is successful, you'll see a message like this:

```
Submission was successful
Changes will be reflected upon the assigned's next login.
```

6 Click **Back to Team Proxy Assignments** to create a new or edit an existing proxy assignment.

To change existing proxy assignments:

1 Click **Team Proxy Assignments** in the My Team's Settings group of actions.

2 Choose the team member whose assignments you want to modify.

You'll see both:

- The proxy assignments for the team member.
- The users assigned as proxy for the team member.

3 To **change** a proxy assignment, click the edit button next to the assignment you want to modify.

4 Complete the panel as follows:

Field	What to do
User	Select the team member for whom you want to assign a proxy. You can select multiple users.
Proxy Assigned	Select the team member to act as proxy.
Expiration	• **End Date**—Click the Calendar and choose a date and time when the proxy assignment expires. • **No Expiration**—Choose No Expiration if you want the proxy assignment to be permanent.

5 Click **Submit** to save your selections.

If the change was successful, you'll see a message like this:

```
Submission was successful
Changes will be reflected upon the assigned's next login.
```

To delete proxy assignments:

1 Click **Team Proxy Assignments** in the My Team's Settings group of actions.

2 To **remove** a proxy setting, click the Delete button.

You are prompted to confirm the delete. When the deletion is complete, you'll see a confirmation like this:

```
Submission was successful.Changes will be reflected upon the
assigned's next login.
```

NOTE: As an alternative, you can also delete a proxy assignment during the edit proxy assignment process.

12.3 Viewing and editing your team's delegate assignments

The **Team Delegate Assignments** action allows you to manage the delegate assignments for you and your team members. The rules for defining delegates are as follows:

- You are allowed to define delegates for yourself and for the members of the group that report directly to you.
- The people that you specify as delegates must also be within your team.
- If you need to assign a delegate who is not a member of your team, you must request the User Application Administrator to define the delegate relationship.

  The User Application Administrator has the ability to define delegate assignments for any user, group, or contain in the organization.

**NOTE:** Task Managers and users without administrative privileges are not permitted to define delegate assignments.

To define a delegate assignment:

1 Click **Team Delegate Assignments** in the Team Settings group of actions.

2 Choose a team member from the list, and click **Continue**.

Any existing assignments for the team member are displayed.

3 Click **New.**

4 Complete the panel as follows:

Field	What to do
User	Select one (or more) user(s) from the list whose work you want to delegate.

Field	What to do
Delegate	Assign the user who can perform the delegated work by selecting one of the following:
	Delegate assigned—Select a user from the list.
	Delegate relationship—Type the LDAP name of a user object attribute that resolves to a Distinguished name, for example, manager.
	This is an advanced feature and should only be used by those familiar with the identity vault schema.
Expiration	Select one of the following:
	• **End Date**—Choose the date and time when the delegate assignment expires.
	• **No Expiration**—Choose this option if you want the delegation to remain in effect until you manually end it. This, in effect, makes the delegation permanent.
Resource Category	Choose a category from the list.
	This populates the list of Available Requests in Selected Category.
Available Requests in Selected Category	Choose one or more resource requests from this list and choose **Add**.
Selected Requests	This list shows the resource request types that have been delegated. To remove a request type, select it from the list and click **Remove.**

5 Click **Submit** to save your assignments.

If the save is successful, you'll see a message like this:

```
Submission was successful
Please note that any previous availability settings for users
referenced in processed delegatee assignment will not be updated
automatically. Please check and refresh any existing availability
settings for the corresponding users in order to activate these
changes.
```

To modify delegate assignments:

1 Click **Team Delegate Assignments** in the Team Settings group of actions.

2 Choose the name of the team member whose assignments you want to modify.

You will see a list of assignments for this team member that includes both their delegated assignments and the assignments where they are the delegate.

3 To edit a delegate assignment, click the edit button in the same row as the assignment you want to modify.

4 Complete the panel as follows:

Field	What to do
User	Select one (or more) user(s) from the list whose work you want to delegate.
Delegate	Assign the user who can perform the delegated work by selecting one of the following: **Delegate assigned**—Select a user from the list. **Delegate relationship**—Type the LDAP name of a user object attribute that resolves to a Distinguished name, for example, manager. This is an advanced feature and should only be used by those familiar with the identity vault schema.
Expiration	Select one of the following: • **End Date**—Choose the date and time when the delegate assignment expires. • **No Expiration**—Choose this option if you want the delegation to remain in effect until you manually end it. This, in effect, makes the delegation permanent.
Resource Category	Choose a category from the list. This populates the list of Available Requests in Selected Category.
Available Requests in Selected Category	Choose one or more resource requests from this list and choose **Add**.
Selected Requests	This list shows the resource request types that have been delegated. To remove a request type, select it from the list and click **Remove.**

5 Click **Submit** to save your selections.

To delete a delegate assignment:

1 Click **Team Delegate Assignments** in the Team Settings group of actions.

You will see a list of assignments for this team member that includes both their delegated assignments and the assignments where they are the delegate.

2 To remove a delegate assignment, click the delete button in the row of the assignment you want to delete.

You are prompted to confirm the deletion. When the deletion is complete, you'll see a confirmation message.

12.4 Specifying your team's availability

The **Team Availability** action allows you to specify the resource requests you or your team members are not available to work on. During the time period when you or your team members are not available, any resource requests of that type are forwarded to the delegate's queue.

You can specify availability for each resource request individually or globally. You can only specify the availability for users who have delegates already assigned.
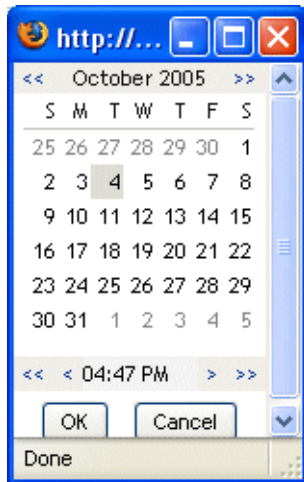
To specify availability:

1 Click **Team Availability** in the My Team's Settings group of actions.

2 Select the name of the team member whose availability you want to specify. Click **Continue**.

3 Specify the status by selecting one of the options in the **Change Status** dropdown:

Status	Description
Available for ALL Requests	This is the default status. It indicates that the team member is globally available. When this status is in effect, requests assigned to the team member will not be delegated, even if there are delegates assigned.
	NOTE: If you change the status and then change it back to Available for ALL Requests, any Selectively Available settings previously defined are removed.
NOT Available for ANY Requests	Specifies that the team member is not available for any resource requests currently in the system. (This is also known as globally unavailable.)
	Choosing this status indicates that the team member is unavailable for each existing delegate assignment and changes the current status to Not Available for Specified Requests.
	Assignments are effective immediately and last until the delegate assignment expires.
	NOTE: This setting does not affect availability for new assignments created after this point.
NOT Available for Specified Requests	When you select this option, you are prompted to specify the team member's availability. (This is the same as clicking the New button.) You'll be prompted to specify:
	• The types of requests the team member is not available for.
	• The time period when the team member is unavailable.
	During the time period when the team member is unavailable for a particular request, the user delegated to act on that request can work on it.

4 Specify the time period when the team member is unavailable:

4a Specify when the time period begins by typing the start date and time in the **Unavailable From** box, or by clicking the calendar and selecting the date and time.

4b Specify when the time period ends by clicking one of the following radio buttons:

Radio button	Description
Duration	Lets you specify the time period in weeks, days, or hours.
End date	Lets you specify the end date and time. You can type the date and time, or click the calendar and select the date and time from the calendar.
No Expiration	Indicates that this unavailability setting will not expire.

5 Select one or more requests in the **Types of Requests** list box, and click **Add**.

NOTE: On this screen, you select the types of requests that the team member will **not** accept during the unavailable period. This has the effect of delegating these requests to other users.

Each request you add is included in the **Declined for the Specified Period** list box.

If you add multiple requests for this time period, each request is treated as an individual object that can be edited separately.

6 To remove a request from the list, click **Remove**.

7 Click **Submit** to save your changes.