APPROVE OR DENY ROLE REQUESTS

EFFECTIVE DATE: September 14, 2024

DESCRIPTION

This guide provides instructions for the UF SailPoint IdentityNow decision workflow that Governance Groups must follow. This includes receiving and viewing the role request, locating Recipient profile data, communicating with the Requester and making the decision to approve or deny the role request.

Warning! Do **<u>NOT</u> Schedule Reassignment** for your Approvals. These Approvals must stay within preapproved Governance Groups.

NOTIFICATION OF REQUEST

When a role that requires approval is requested, <u>all members of the approving Governance Group</u> will receive an email with the **subject:** *"New access request for <name> ready to review".* The body of the email will contain information about the request:

- The Requester (DSA) or Primary Requester (Primary DSA) requesting the role
- The role name and identity of the Recipient needing the role
- Any comments provided by the Requester
- A link to the Approvals page in IdentityNow (this will show all pending requests, not just the specific request from the email)

INSTRUCTIONS

- 1. Go to ufl.identitynow.com.
- 2. Log into SailPoint with the standard UF SSO.

3. On the home page, click **Approvals** or **Access Requests to Review**.

Home Request Center Approvals Ta	sk Manager Certifications Search Admin	0
Welcome Last login on 04-30-2024		Customize 🛞
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4. Click **Requested** and then click on the role request card for review.

Warning! Do **NOT Schedule Reassignment** for your Approvals. Approvals must stay within preapproved Governance Groups.

Home Reques	st Center Approvals Task Manager	Certifications Search	Admin		0	~
Access Requests	Requested Reviewed					
Entitlement Descriptions				Never re	assign	T
	APPROVAL Access Request Grant: UF_IAM_APPROVER_T *TRAINING:PRV802 * **AUTHORITY AF DATE REQUESTED Jun 28, 2024	REA REQUIRED IN COMMENT* REQUESTED BY Sat	* This role is reserved for testing approver RECIPIENT Carter	Approve capabilities in SailPoint. TYPE Role	Deny	Reassign

 In the flyout panel, click the role **Details**. Take special note of **TRAINING** details and the **AUTH** AREA COMMENT needed, if provided.

ested Reviewed		Requested for Carter	
		Details Identity Comments	
ROVAL Access Request		Description	
ant: UF_IAM_APPR	OVER_TEST1	*TRAINING:PRV802 * *AUTHORITY AREA REQUIRED	
RAINING:PRV802 * **AUTH	IORITY AREA REQUIRED IN COMMENT** T	his role is reserved for testing IN COMMENT** This role is reserved for testing	
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1 28, 2024	Sat	Carter Type	
		Role	
		Last Approver	
		James	
		Created	
		Jun 28, 2024	
		Approve Denv	



UF SailPoint IdentityNow

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6. Click Identity to review the Recipient's name, UFID, email, dept, and training data.

rT** This role is reserved for testing approver capabilities in SailPoint. RECIPIENT TYPE Carter Role	Requested for Carter Details Identity Identity Comments Identity Carter Manager B Status active UFID UFID
LT** This role is reserved for testing approver capabilities in SailPoint. RECIPIENT TYPE Carter Role	Details Identity Comments Identity △ Carter Manager ○ B Status active UFID UFID
LT** This role is reserved for testing approver capabilities in SailPoint. RECIPIENT TYPE Carter Role	Identity △ Carter Manager ☑ B Status active UFID
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IT** This role is reserved for testing approver capabilities in SailPoint. RECIPIENT TYPE Carter Role	Manager B Status active UFID
RECIPIENT TYPE Carter Role	Manager B Status active UFID
Carter Role	Status active UFID
	Status active UFID
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	13 471
	GatorlinkID
	са
	UF Business Email
	@ufl.edu
	Primary Dept Name
	IT-ICT
	Training
	DDV000 DDC500
	PRV802, BR0500

7. Click **Comments** to review the comments (Auth Area, etc.) left by the Requester

Task Manager Certifications Sear	ch Admin	G	Grant: UF_IAM_ equested for Carter	APPROVER	_TEST1 ×
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APPROVER_TEST1			Details Identity	Comments	
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UF SailPoint IdentityNow

8. Open a new browser tab and go to **ufl.identitynow.com**.

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9. In the new tab, click Admin.

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0 Pending Tasks	01 Pending Certifications	Or O2 Access Requests to Review
양 0 My Team	🔂 0 Pending Requests	102 My Access
	0 Manage Non-Employees	



10. Click Identity Management and Access History.

Home Reque	st Center Approvals Task Manager	Certifications Search Admin		0
iboard 🗸 Identity Managem	nent 🔨 Certifications Reports			
Access History				
Aggrega Outliers				≛ CSV
Name	Туре	User	Date	Status
UF QAT MDM	Account Aggregation	UFIT.IAM	07/02/2024 8:30:02 AM	Success
PSFT HR Read-only	Account Aggregation	(Scheduled Aggregation)	07/02/2024 8:00:15 AM	Success (i
PSFT CS Read-only	Account Aggregation	(Scheduled Aggregation)	07/02/2024 8:00:13 AM	Success (i
UF QAT MDM	Account Aggregation	UFIT.IAM	07/02/2024 7:30:04 AM	Success
PSFT HR Read-only	Account Aggregation	(Scheduled Aggregation)	07/02/2024 7:00:17 AM	Success (i
View All				
Org Details	To Do Tasks			≛ csv
	Name		Owner	Date 😽
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ufi-sandbox	Certification Items Revoke	ed by UFIT.IAM U	IFIT.IAM	32 hours ago
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11. Copy & paste the Recipient's name from the first tab; or search using last name (*comma and space*) first name. Click the Recipient's name.

Note: SailPoint uses the identity's "chosen name" as the display name, the identity's legal name will appear in **View Profile**.

Home Reques	t Center Approvals	Task Manager	Certifications	Search	Admin		
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Q Alligator, Al 🛞 🔻	#NAME? Access Hi	story Comp	oare Access Vi	ew Profile			
Alligator, Al		A	This identity has I historical data ava	oeen delete ailable.	d from our :	system bu	it has
Alligator, Al B							
Alligator, Al C	Access Changes	2		Month	Day		
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	11/2022 12/2 202	2022 1/2023 22 2023	2/2023 3/2023	4/2023	5/2023	6/2023	7/2023

12. Click **View Profile** to review and confirm the Recipient's information (first & last name, email, Dept ID, Primary Dept ID, phone number, UFID, etc.), and their current training data.

Home Request	Center Approvals Task Manager Certifications Search Admin	~
Dashboard 🗸 🛛 Identity Managemer	nt 🗸 Certifications Reports	
Q alligator 🛞 🕚	Alligator, Albert Access History Compare Access View Profile	Ĺ
Alligator, Albert	Identity State: ACTIVE Internal Cloud Status: UNREGISTERED	
Alligator, Albert	Ismanager: false Lastname: Alligator	
Alligator, Albie A	Mover Detection Dept: none	
Alligator, Bertie B	Personal Email: e@ufl.edu Phone: 1 352 273	
Alligator, Chris	Primary Affiliation: Contact	
Alligator, Chrissy	Primary Department Id: TEST	
Alligator, Student Albert	Primary Department Name: linda	
🛆 Alligator,Albert	Training: PRV802, BRG500	
Alligator,Albert	Transformtest: none	
\land Alligator,Albert	Uid: 80295000	
Alligator,Albert	Username: test017	

13. Click **Access History** and then **Roles** to review the Recipient's current roles and confirm that **Separation of Duties (SoD) or conflicting roles** are not assigned, if applicable.

Home Requ	iest Center Approvals Ta	sk Manager Certificati	ons Search Admin			0		
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lligator, Albert	Total Access Items	Access Profiles	Accounts	Apps	Entitlements	Roles		
ligator, Albert	14	0	3	0	6	5		
ligator, Albert								
ligator, Albie A	Roles							
lligator, Bertie B				1				
ligator, Chris	Display Name			Description				
ligator, Chrissy	UF_SF_STUDENT_SS			This role is automatically assigned to users with a University affiliation. This is a Self Service role allowing users to view their debts, service indicators and other related items. This is access to student financials, not				
lligator, Student Albert				student access.				
Alligator,Albert	UF_SS_USER			Universal role that allo	ws user to sign-on.			
Alligator,Albert	UF_N_PY_FMR_EMP			Auto-assigned role that following: • View emplo	t grants self-service users ac oyee W2 • View employee pro	cess in One UF to the evious paychecks • View		
Alligator,Albert				employee year-end sta	tements			
Alligator,Albert	UF_IAM_CANC			This is a role to be requ	ested and then cancelled by	y the DSA		
Alligator,Albert	UF_IAM_TrainTest1			*TRAINING:ITT102 * Th training ITT102	is is a role that is auto-appro	oved and requires		

14. Once you've gathered all the information needed to make your decision, return to the first web browser tab where the **Comments** section for this request is still open.

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- 15. Approve or deny the role request.
 - a. **Approve:** If you would like to type a comment for your decision, you may. Click **Approve**.

Task Manager Certifications	Search Admin	Grant: UF_IAM_APPROVER_TEST1 × Requested for Carter
uest		
APPROVER_TEST1		
AUTHORITY AREA REQUIRED IN CO	MMENT This role is reserved for testing approve	er capabilities
REQUESTED BY	RECIPIENT	TY Comments are required for denying access
Sat	Carter	R Leave a comment
		Approve Deny

 Deny: Denial comments are *required and will be sent to <u>both the Requester and the non-Recipient of the role</u>. Type the <u>adequate reason</u> for denial and if applicable, next steps. Click Deny.

Note: Email notification with comments will automatically be sent to the DSA Requester and the Recipient of the role.

FOR ADDITIONAL ASSISTANCE

Technical Issues	Policies and Directives
The UF Computing Help Desk	UFIT: Identity & Access Management
352-392-HELP	<u>ufit-ars@ad.ufl.edu</u>
helpdesk.ufl.edu	<u>identity.it.ufl.edu</u>