# COMPLETE CERTIFICATION CAMPAIGNS

**EFFECTIVE DATE:** SEPTEMBER 14,2024

DESCRIPTION

Audience: Primary Requesters only

UF IAM has designated one Primary Requester per department. The Primary Requester is responsible for all departmental certification campaigns.

## **Entitlement Approval First**

In SailPoint, Entitlements **must be approved** as part of the certification process.

1) On the **Entitlements tab**, select all, and then click **Approve** - this will bulk approve all those Entitlements

2) On the **Roles tab**, select all, and then click **Acknowledge** - this will acknowledge all the roles that are granted by birthright.

3) Now, what's left will be the <u>Requestable Roles</u> - this is where we ask you **spend time scrutinizing the requested access** that may no longer be needed or appropriate. You will decide to approve or revoke these.

**Note:** If no <u>Requestable Roles</u> remain after completing steps 1 and 2, proceed directly to step 4.

4) After submitting decisions on all item, be sure to "sign-off" on the recertification.

## **Reassignment of Certifications**

Primary requesters may reassign particular certification decisions to the appropriate Requester who better understands the role needs of their assigned personnel or entire certification campaigns to fellow departmental Requesters when out of office for an extended period of time.

### INSTRUCTIONS

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



UF

3. On the home dashboard, click on **Pending Certifications** 

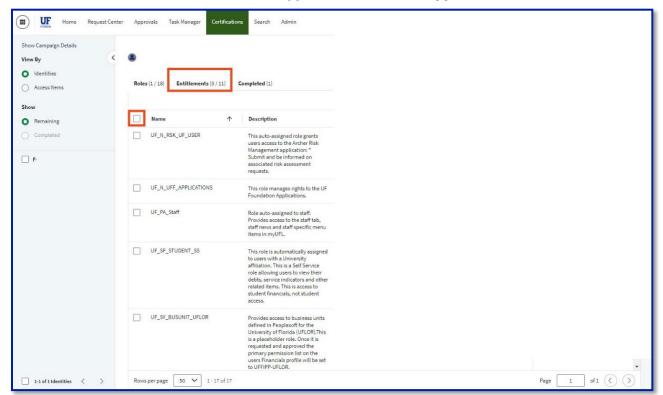
Home Request Center Approvals	Task Manager Certifications Search Admin	0
Welcome Last login on 06-13-2024		Customize 🛞
🖉 0 Pending Tasks	<b>07</b> Pending Certifications Due in 14 days	orgic of Access Requests to Review
ᅇ <b>0</b> My Team	<section-header> 0 Pending Requests</section-header>	2 <b>102</b> My Access
	<b>O</b> Manage Non-Employees	

4. Click the task card in the active tab

Home Request Center Approvals	Task Manager	Certifications	Search Admin	0
Active Completed			Sched	ule Reassignment
DSA_Test This is to recertify the user Decisions Made Due In Reassigned From 5 of 5 3 Days J DETAILS	B just B Decisions Made 1 of 29	<b>Due In</b> 14 Days	Reassigned From C DETAILS	
			+ 0	



5. Click the Entitlements tab. Select all, then Approve. This will bulk Approve all Entitlements.

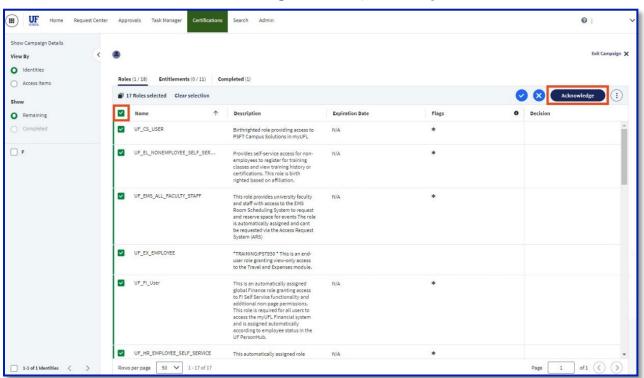


6. Note: On the Roles tab, notice the Decision column with Acknowledge, <a>(Approve) & <a>(Revoke)</a>)

v Campaign Details By	< 🔹					Exit Campaign
Identities	Pole	s (1 / 18) Entitlements (0 / 11)	Completed (1)			
Access Items	Koles		compresed (1)			
v						
Remaining		Name	↑ Description	Expiration Date	Flags	Decision
Completed		UF_N_RSK_UF_USER	This auto-assigned role grants users access to the Archer Risk Management application: * Submit and be informed on associated risk assessment	N/A	*	Acknowledge
		UF_N_UFF_APPLICATIONS	requests. This role manages rights to the UF Foundation Applications.			
		UF_PA_Staff	Role auto-assigned to staff. Provides access to the staff tab, staff news and staff specific menu items in myUFL.	N/A	*	Acknowledge
		UF_SF_STUDENT_SS	This role is automatically assigned to users with a University affiliation. This is a Set Service role allowing users to view their debts, aervice indicators and other related items. This is access to student financials, not student access.	N/A	*	Acknowledge .
		UF_SY_BUSUNIT_UFLOR	Provides access to business units defined in Peoplexoft for the University of Florida (UFLOR).This is a placeholder role. Once it is requested and approved the primary permission list on the users Financials profile will be set to UFFIP-UFLOR.			$\odot$ $\otimes$ $\odot$



7. Tick the Select All box and click Acknowledge to recertify all birthright access roles



- a. Note: After acknowledging all birthright access roles, you will be left with the recertification decisions that you need to make. This is where we ask you <u>spend time scrutinizing the requested</u> <u>access</u> that may no longer be needed or appropriate.
- 8. Click the ... (More Options) icon to reveal the details of each role

Campaign Details								
By	۲							Exit Campaign
Identities	Roles (13 / 18) Entitlement	r (0 / 11) Con	mpleted (13)					
Access Items			inpreten (15)					G
e i i i i i i i i i i i i i i i i i i i								
Remaining	Name	$\uparrow$	Description	Expiration Date	Flags	0	Decision	
Completed			distribution services using email, protected IT oriented webpages, and similar communication channels.					
			This role should not be used to distribute information or communication that is sensitive or restricted. Assign this role to employees who should communicate as IT workers at UF.					
	UF_N_UFF_APPLICATION	IS	This role manages rights to the UF Foundation Applications.					• × •
	UF_SY_BUSUNIT_UFLOR		Provides access to business units defined in Peoplesoft for the University of Florida (UFLOR,This is a placeholder role. Once it is requested and approved the primary permission list on the users Financials profile will be set to UFFIPP-UFLOR.					
	UF_TL_DEPT_APPROVER		***Additional Security Setup is Required*** TRAINING-PST916 * This is an end user role granting access to the Time and Labor module to? Review and approve time worked for department employees* Maintain supervisor groups					) 🗙 💬

a. Note: Read through Details, Account Name, Account ID, and Flags for accuracy



#### 9. Add a comment about this decision and then click Approve

Role: UF_TL	DEPT_APPROVER	×
Description	***Additional Security Setup is Required*** *TRAINING:PST916 * This is an end user role granting access to the Time and Labor module to:* Review and approve time worked for department employees* Maintain supervisor groups	Select Revocation Date
Owner	identity-services@it.ufl.edu	
Requestable	True	
		Add a comment about this decision
Access Profiles (0	0) Entitlements (4)	
Name	UF_SEC_PWD_LEVEL3	
Description	UF Password Policy 3	
View $\rightarrow$		
Name	UF_TL_DEPT_APPROVER	
Description	[UF] TL Dept Approver	
View $\rightarrow$		
Name	UF_SEC_PWD_LEVEL3	
Description	UF Password Policy 3	
View $\rightarrow$		
Name	UF_TL_DEPT_APPROVER	
Description	[UF] TL Dept Approver	
View $\rightarrow$		
		Reassign Decision

- a. There are three possible decisions in SailPoint:
  - i. Reassign Decision: If you cannot decide, reassign to another DSA
  - ii. Approve: Recertify this role for this identity
  - iii. Revoke: Do not recertifying role for this identity (comment required\*)

# FOR ADDITIONAL ASSISTANCE

#### **Technical Issues**

### **Policies and Directives**

The UF Computing Help Desk 352-392-HELP <u>helpdesk.ufl.edu</u> Identity & Access Management Services <u>ufit-ars@ad.ufl.edu</u> <u>identity.it.ufl.edu</u>