## **REQUEST ROLES**

## **EFFECTIVE DATE:** SEPTEMBER 14,2024

## DESCRIPTION

UF has transitioned from PeopleSoft ARS to UF SailPoint IdentityNow for the majority if it's role management needs. This guide provides Requesters and Primary Requesters with step-by-step instructions for submitting role requests.

**No Waiting Period:** Requesters and Primary Requesters can submit multiple role requests for an identity without the delayed waiting period that was experienced in PeopleSoft ARS.

**Assigned Personnel Only:** Requesters and Primary Requesters can only submit role requests for departmental personnel assigned to them. Submitting for anyone else is <u>strictly prohibited</u>.

**PeopleSoft ARS:** UF is still utilizing PeopleSoft Access Request System for Additional (Row-Level) Security Setups. UF IAM (<u>myit-erpsecadmin@ufl.edu</u>) will also manually manage DSO Business Unit roles in PeopleSoft ARS.

### INSTRUCTIONS

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

Home Request Center Approvals	Task Manager Certifications Search Admin	@   ~
Welcome		Customize
🖒 0 Pending Tasks	⊘ 0 Pending Certifications	Or Access Requests to Review
<b>윤 0</b> My Team	• Pending Requests	178 My Access
	<b>0</b> Manage Non-Employees	



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## 4. Click Request for Others

Home Request Cent	er Approvals Task Manager Certi	fications Search Admin	0   ×
IdentityNow / Who Are You Request	ing For?		
	Who Are You Requesting For?	View My Requests	
	2	<u>6</u> 9	
	<b>Request for Yourself</b> Make an access request for yourself.	<b>Request for Others</b> Make an access request on behalf of someone in your org.	
	Request for Myself	Request for Others	

- 5. Search for the UFID(s) of the employee(s)
  - a. You can select multiple identities at once. However, <u>you will be requesting roles for all the</u> <u>identities selected</u>.

	Home	Request Center	Approvals	Task Manager	Certification	s Search	Ad	Who Are You Requesting For?	×
IdentityNow	/ Who A	re You Requesting	For?						
	Who Are You Requesting For?							Select Identities * 92725150 Cator, Rusty 😧 Dee, Gator	<u>~</u>
				0			0	Alligator, Albert	0
						(			
			<b>Requ</b> Make an	est for Yourself access request for yourself.	r	<b>Req</b> Make an ac of som	uest fo cess re neone		
			Requ	lest for Myself		Requ	uest fo		
								Request for These Identities	$s \rightarrow$



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#### 6. Click Request for These Identities

Home Request Cent	er Approvals Task Manager Certi	fications Search Ad	Who Are You Requesting For?	×			
IdentityNow / Who Are You Request	ing For?						
	Who Are You Requesting For?						
	2	2	Alligator, Albert 🔇 Dee, Gator 🔇				
	Request for Yourself Make an access request for yourself. Request for Myself	Request for Make an access re of someone Request for					
			Request for These Identi	ities →			
Click Roles	_						
	er Approvals Task Manager Certif	ications Search Admin	0	$\sim$			

	Request center	Арргочата тазк маладет	Certifications .	Admin			·
IdentityNow / Who A	Are You Requesting	For? / Request Access					
Applications	Se	lect Applications for 💄 4	Users 🖉			Review Request 0	
Access Items							
Roles							
Access Profiles							
My Requests	1		No Application	<b>is are configured f</b>	or request.		
				View Access Items			



8. Search for the Role(s) the identities will need

Home	Request Center	Approvals	Task Manager	Certifications	Search	Admin	Ø	~
ldentityNow / Who A	re You Requesting	For? / Requ	est Access					
Applications Access Items Roles	Sel	ect Roles fo Q idm / 10 Results Se	r 💄 4 Users				Review Request O	
Access Profiles	_	,						
My Requests	1 U	IF_PA_IDM_A	DMINUSER	ninistrator for ID Ma	anagement (	IDM) and select st	Details taff in OUR HR Finance and a few other units Select	
	L	IF_PA_IDM_C	OORDINATOR	sons identity infor	mation in th	e UF directory	Details Select	

#### 9. Click Select

- 10. Click **Details** to review the requirements of the role: auth area comment, required training, Separation of Duties conflicting roles to avoid, etc.
  - a. (If you do<u>not</u> need to obtain/confirm identity profile data, skip to step 18 on page 8. Otherwise, move to the next step to locate identity data such as completed required training, security roles, Dept ID., primary affiliation, etc.)
- 11. If there are role requirements to confirm, open a new browser tab and go to **ufl.identitynow.com**.

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	UF HORIDA	ome	Request Center	Approvals	Task Manager	Certifications	Search	Admin		0		~
<b>Wel</b> Last I	come . login on 07-03-2	2024								Custom	ize 🛞	*



### 12. In the new tab, click Admin.

Home Request Center Approvals	Task Manager Certifications Search Admin	@   v
Welcome		Customize 🛞
🖉 0 Pending Tasks	O1 Pending Certifications	<b>○ ′ 02</b> Access Requests to Review
<b>谷 0</b> My Team	<section-header> 0 Pending Requests</section-header>	2 <b>102</b> My Access
	<b>0</b> Manage Non-Employees	

## 13. Click Identity Management and Access History.

Home Request Ce	enter Approvals Task Manager	Certifications Search Admin		0	
board V Identity Management	<ul> <li>Certifications Reports</li> </ul>				
Access History					
Aggrega Outliers				* (	SV
Name	Туре	User	Date	Status	
UF QAT MDM	Account Aggregation	UFIT.IAM	07/02/2024 8:30:02 AM	Success	i
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	i
PSFT HR Read-only	Account Aggregation	(Scheduled Aggregation)	07/02/2024 7:00:17 AM	Success	i
View All					
Org Details	To Do Tasks			± (	SV
	Name	c	Dwner	Date	~
Org Name	Certification Items Revoked	by UFIT.IAM UI	FIT.IAM	32 hou	irs ago
ufl-sandbox	Certification Items Revoked	by UFIT.IAM UI	FIT.IAM	32 hou	irs ago
	Certification Items Revoked	by UFIT.IAM UI	FIT.IAM	32 hou	irs ago
	Certification Items Revoked	by UFIT.IAM UI	FIT.IAM	32 hou	irs ago

14. 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**.

UF Sai	lPoint	ldentitv	/Now

Home Request	enter Approvals Task Manager Certifications Search Admin
Dashboard 🗸 Identity Manageme	✓ Certifications Reports
Q Alligator, Al 🛞 🝸	#NAME? Access History Compare Access View Profile
Alligator, Al	This identity has been deleted from our system but has historical data available.
Alligator, Al B	
Alligator, Al C	Access Changes 2 Month Day
	<b>0 0 0 0 0 0 0 0 0 0</b>
	11/2022 12/2022 1/2023 2/2023 3/2023 4/2023 5/2023 6/2023 7/2023 2022 2023

15. 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	0	~
Dashboard 🗸 Identity Managemen	nt 🗸 Certifications Reports		
Q alligator (8)	Alligator, Albert Access History Compare Access View Profile		
Alligator, Albert	Identity State: ACTIVE Internal Cloud Status: UNREGISTERED		
Alligator, Albert	Ismanager: false		
Alligator, Albert	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	Refeds Level Of Assurance:         Low           Training:         PRV802, BRG500		
\land Alligator,Albert	Transformtest: none		
🔥 Alligator,Albert	Uid: 80295000		
🔥 Alligator,Albert	Username: test017		

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16. 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 Reques	t Center Approvals Ta:	sk Manager Certificatio	ns Search Admin			0	~
Dashboard 🗸 Identity Manageme	ent ∨ Certifications F	deports					
Q alligator 🛞 🝸	Alligator, Albert	ess History Compare	Access View Profile				
Alligator, Albert	Total Access Items	Access Profiles	Accounts	Apps	Entitlements	Roles	
Alligator, Albert	14	0	3	0	6	5	
Alligator, Albert	_						
Alligator, Albie A	R.L.						
Alligator, Bertie B	Roles						
Alligator, Chris	Display Name			Description			
Alligator, Chrissy	UF_SF_STUDENT_SS			This role is automaticall This is a Self Service role indicators and other rela	y assigned to users with a t allowing users to view the ated items. This is access to	Jniversity affiliation. ir debts, service student financials, not	
Alligator, Student Albert				student access.			
\land Alligator,Albert	UF_SS_USER			Universal role that allow	vs user to sign-on.		
🔥 Alligator,Albert	UF_N_PY_FMR_EMP			Auto-assigned role that following: • View employ	grants self-service users ac vee W2 • View employee pre	cess in One UF to the evious paychecks • View	
\land Alligator,Albert				employee year-end state	ements		
\Lambda Alligator,Albert	UF_IAM_CANC			This is a role to be reque	sted and then cancelled by	the DSA	
🔥 Alligator,Albert	UF_IAM_TrainTest1			*TRAINING:ITT102 * This training ITT102	s is a role that is auto-appro	oved and requires	

17. Once you've obtained all the required identity information, navigate back to the first SailPoint tab on your browser

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← → C ⋒ ufl-sandbox.identitynow.com/ui/d/mysailpoint ★	📢 🧔 🗗 📑 👬 : ≫ 📄 All Bookmarks
Home Request Center Approvals Task Manager Certifications Search Admin	0   V
Welcome . Last login on 07-03-2024	Customize 🛞

UF SailPoint IdentityNow

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#### 18. Click **Select** to add the role.

Home	Request	Center Approvals	Task Manager	Certifications	Search	Admin	0	~
ldentityNow / Whe	o Are You Req	uesting For? / Req	uest Access					
Applications		Select Roles fo	or 💄 4 Users				Review Request 0	
Access Items		Q idm					$\otimes$	
Roles								
Access Profiles		0 / 10 Results S	elected View C					
My Requests	1	UF_PA_IDM_4 Role : Assigned	ADMINUSER to the Identity Adm	ninistrator for ID Ma	nagement (	(IDM) and select staff	Details	]
		UF_PA_IDM_C Role : Allows ma	COORDINATOR	sons identity inform	mation in th	e UF directory	Details	
							Select	

19. Add comment in the text box, as needed. Some roles require an <u>Auth Area comment</u> and will not allow submission without it. If you are still unsure of what to put for Auth Area comment, please refer to the Role's **Details** for the required information.

IdentityNow / Who Are You Request	Center Approvals Task Manager Certifications Search Ad	Leave a comment ×
Applications Access Items Roles	Select Roles for 💄 4 Users	Add Comments * Auth Area: Dept ID 000000; will be managing HR & financial tasks for dept
Access Profiles My Requests 1	1 / 10 Results Selected       View         UF_PA_IDM_ADMINUSER         Role : Assigned to the Identity Administrator for ID Management (IDM) :	
	UF_PA_IDM_COORDINATOR Role : Allows maintenance of a persons identity information in the UF of	
		Cancel Save

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### 20. Click Save

Home	Request Center	Approvals Task Manager Certifications Searc	h Admin Leave a comment	×
IdentityNow / Who A	re You Requesting	For? / Request Access		
Applications Access Items	Se	lect Roles for 💄 4 Users	Add Comments * Auth Area: Dept ID 000000; will be managing HR & financial tasks for dept	
Polor		Q lam		
Access Profiles	1	/ 10 Results Selected View		
My Requests	1 U	JF_PA_IDM_ADMINUSER Role : Assigned to the Identity Administrator for ID Manageme	nt (IDM) and	
	L	JF_PA_IDM_COORDINATOR Role : Allows maintenance of a persons identity information in	n the UF dires	
			Cancel Save	

#### 21. Click Review Request

Home Reques	t Center Approvals Task Manager Certifications Search Admin	0   · · · ·
IdentityNow / Who Are You Re	equesting For? / Request Access	
Applications	Select Roles for 💄 4 Users	Review Request 1
Access Items	Q idm	$\otimes$
Roles		
Access Profiles	1 / 10 Results Selected View	
My Requests 1	UF_PA_IDM_ADMINUSER	Details
	Role : Assigned to the Identity Administrator for ID Management (IDM) and select staff in OUR HR Finance and I Comment	and a few other units
	UF_PA_IDM_COORDINATOR	Details
	Role : Allows maintenance of a persons identity information in the UF directory	
		Select

#### 22. Confirm that roles and identities are correct. Click **Submit Request**.

Close 🗴
Submit Request 1
4 Identities
Gator, Rusty 😧 Gator, Sharon 🔇 Alligator, Albert 😮 Dee, Gator 🔇 Select Identities

23. Success! message will appear, confirming submission

**Note:** Requesters & Primary Requesters do <u>not</u> need to wait for role approval before submit another role request for departmental personnel assigned to them





24. Emails from **UF SailPoint IdentityNow** <<u>sailpoint-no-reply@it.ufl.edu</u>> will be sent to inboxes:

- 1. Governance Group: stating who requested a Role for an identity and the Auth Area comment
- 2. Recipient: stating that a Role has been requested for them
- 3. Requester: stating requested Role(s) for identities:

N no-reply@sailpoint.com To:	← Reply	≪∖ Reply all	→ Forward = Mon 4/22/2024 10:14 AM
Dear			
You've requested access for the following identities:			
Gator, Sharon: The following item(s) was requested successfully:			
Roles:			
Dee, Gator: The following item(s) was requested successfully:			
Roles:			
Gator, Rusty: The following item(s) was requested successfully.			
Roles:     VF_PA_IDM_ADMINUSER			
Alligator, Albert: The following item(s) was requested successfully:			
Roles:         VIF_PA_IDM_ADMINUSER			
Thanks, The SailPoint - UFL			

25. The Requester and Recipient will receive an email when the request is approved or denied (with denial comment).

## FOR ADDITIONAL ASSISTANCE

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