

REQUEST ROLES

EFFECTIVE DATE: SEPTEMBER 14, 2024

DESCRIPTION

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

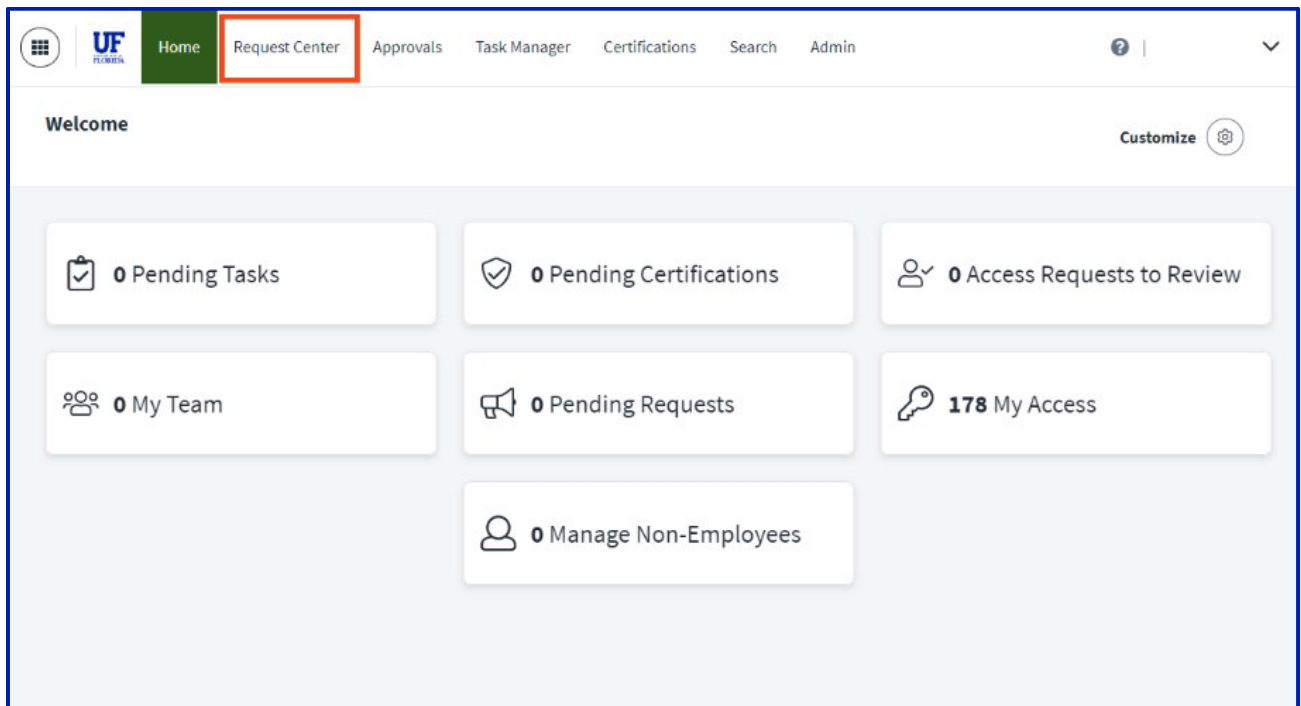
No Waiting Period: Requesters and Primary Requesters can submit multiple role requests for an identity without the delayed waiting period that was experienced in PeopleSoft ARS.

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

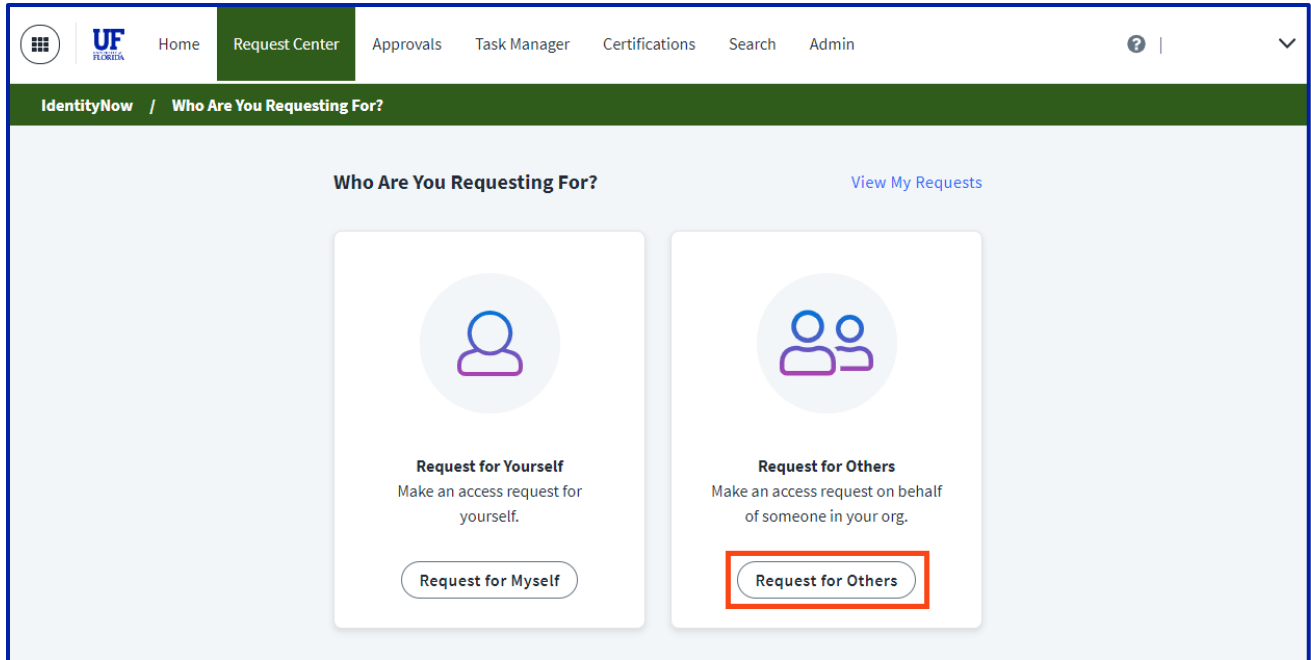
PeopleSoft ARS: UF is still utilizing PeopleSoft Access Request System for Additional (Row-Level) Security Setups. UF IAM (myit-erpsecadmin@ufl.edu) will also manually manage DSO Business Unit roles in PeopleSoft ARS.

INSTRUCTIONS

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

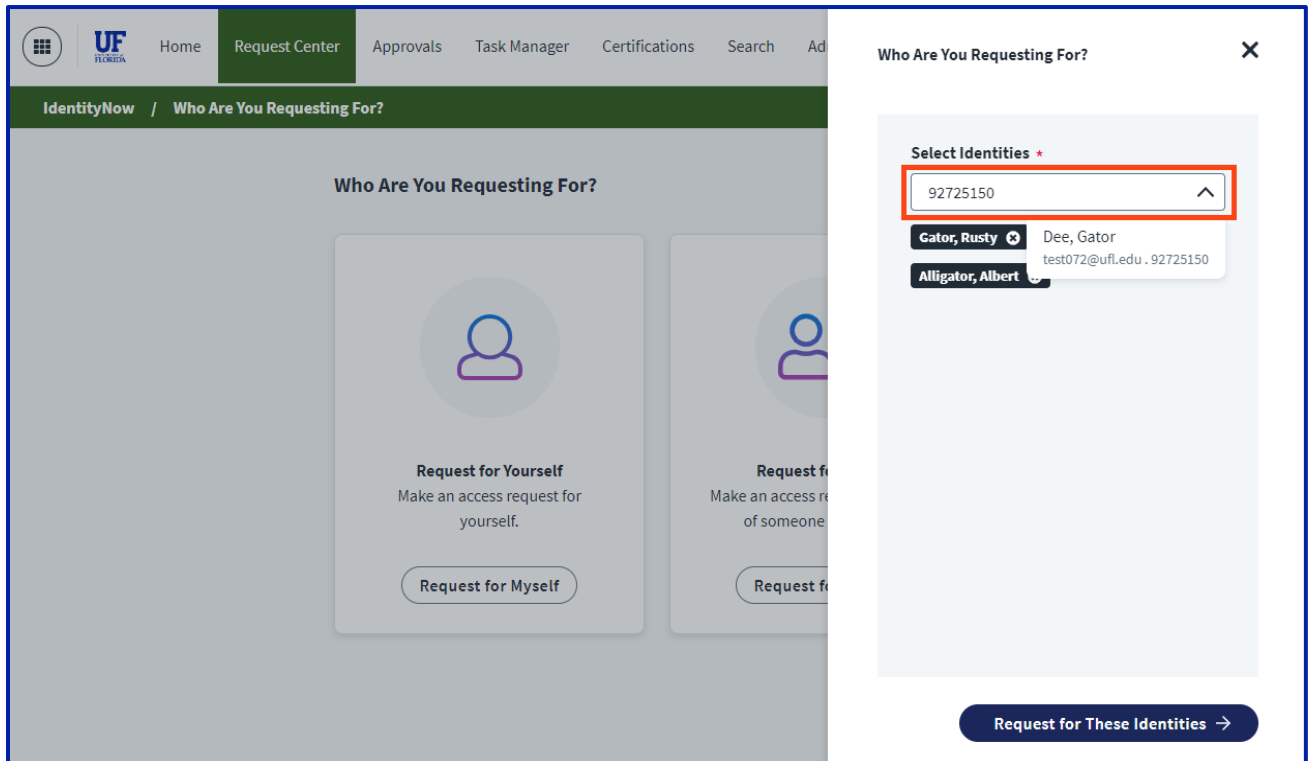


4. Click **Request for Others**

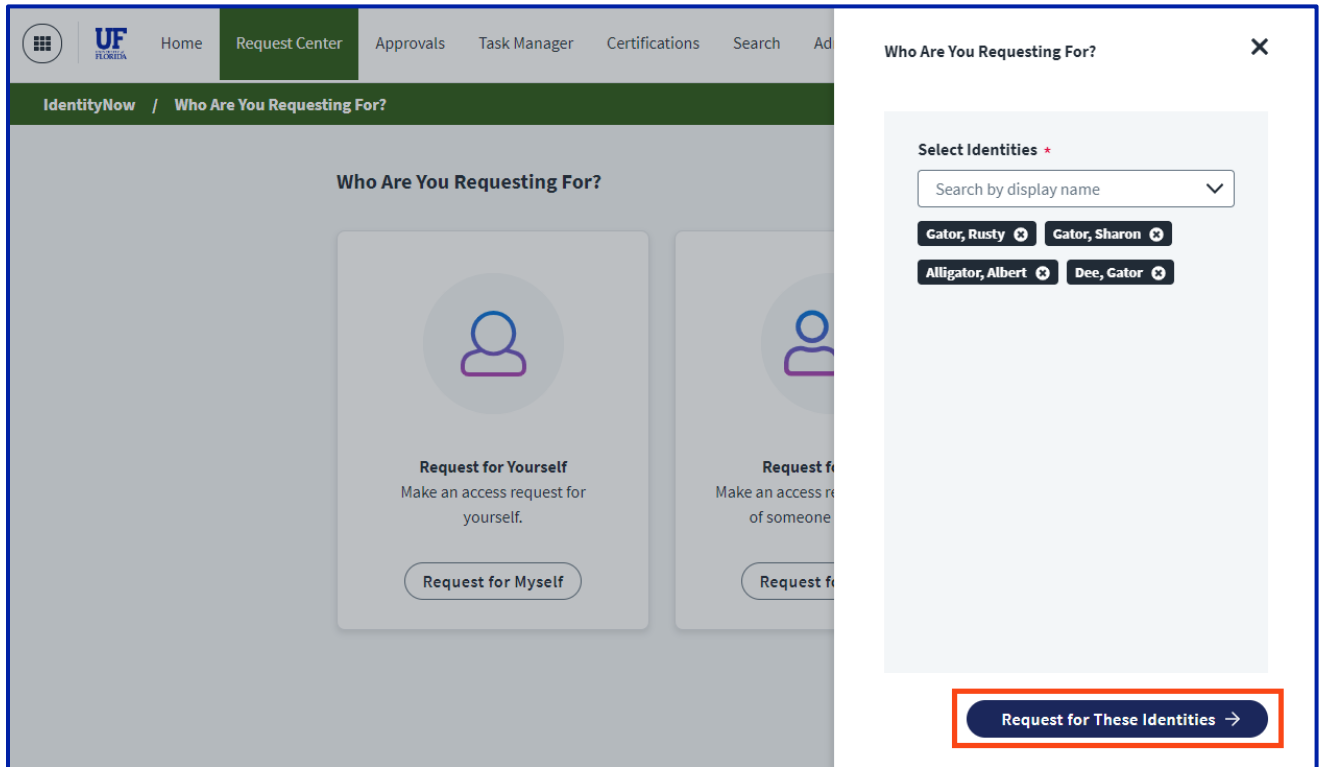


5. Search for the UFID(s) of the employee(s)

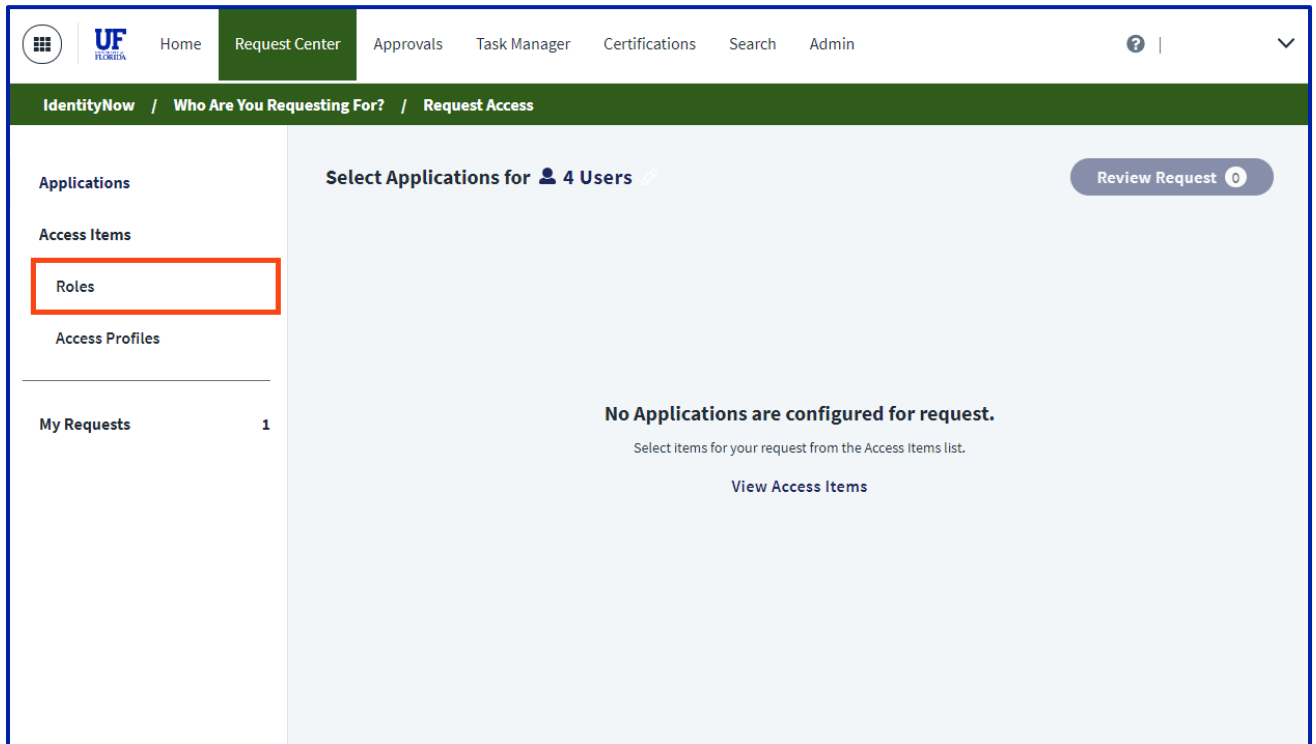
- a. You can select multiple identities at once. However, you will be requesting roles for all the identities selected.



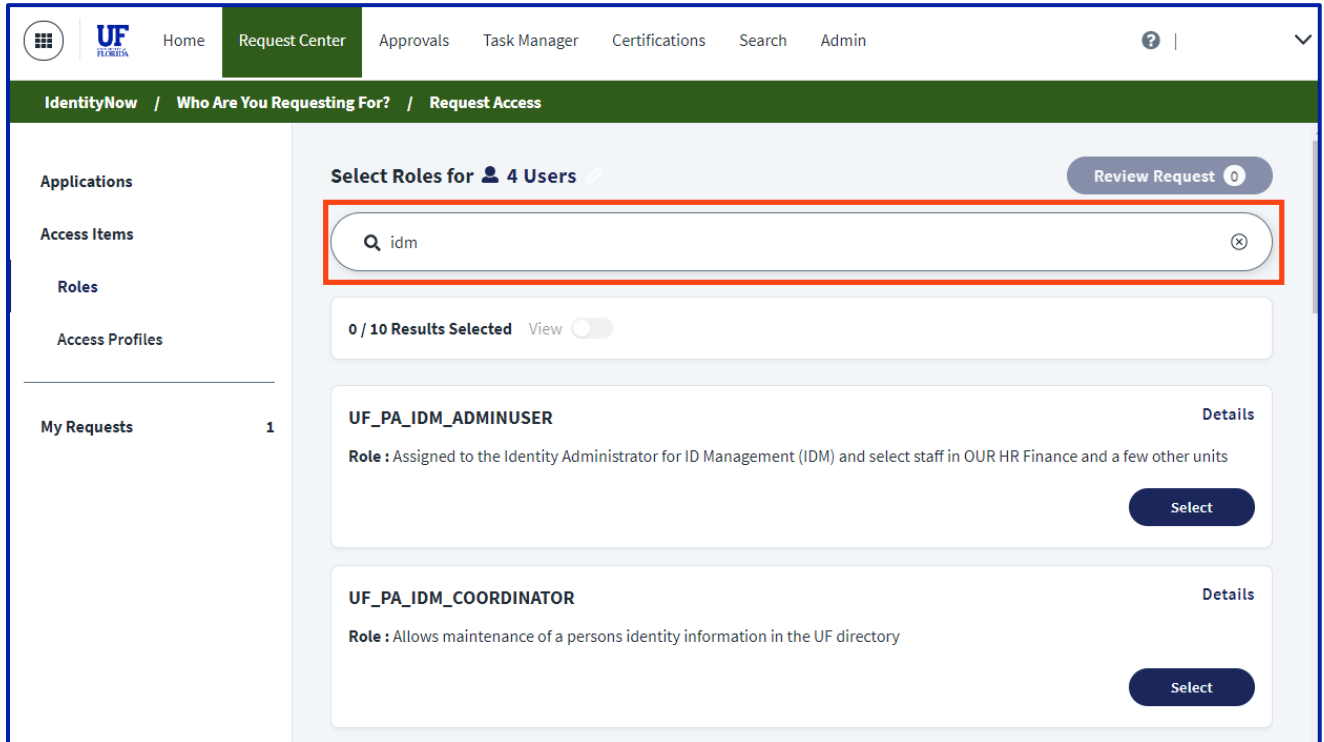
6. Click **Request for These Identities**



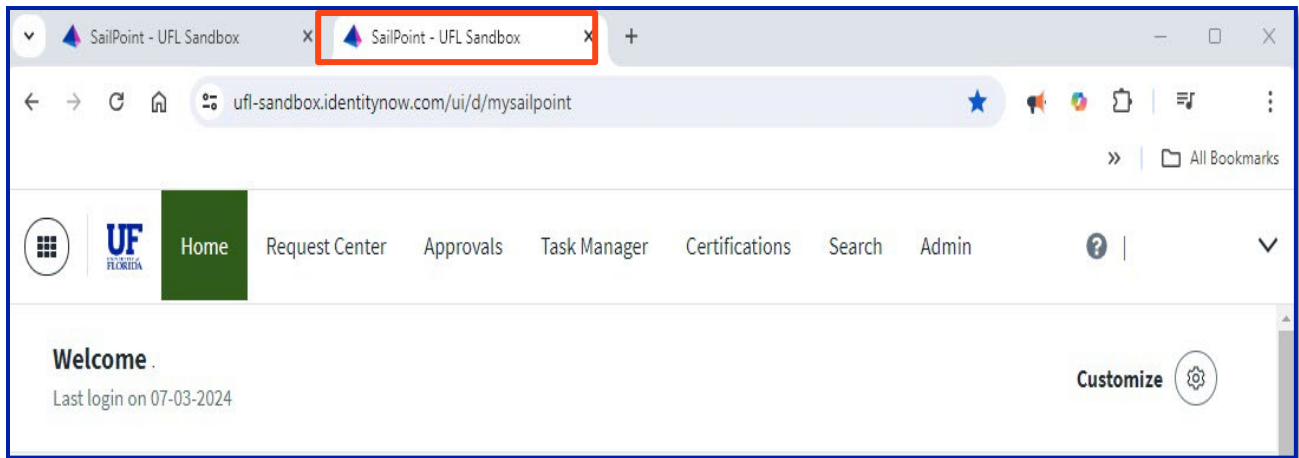
7. Click **Roles**



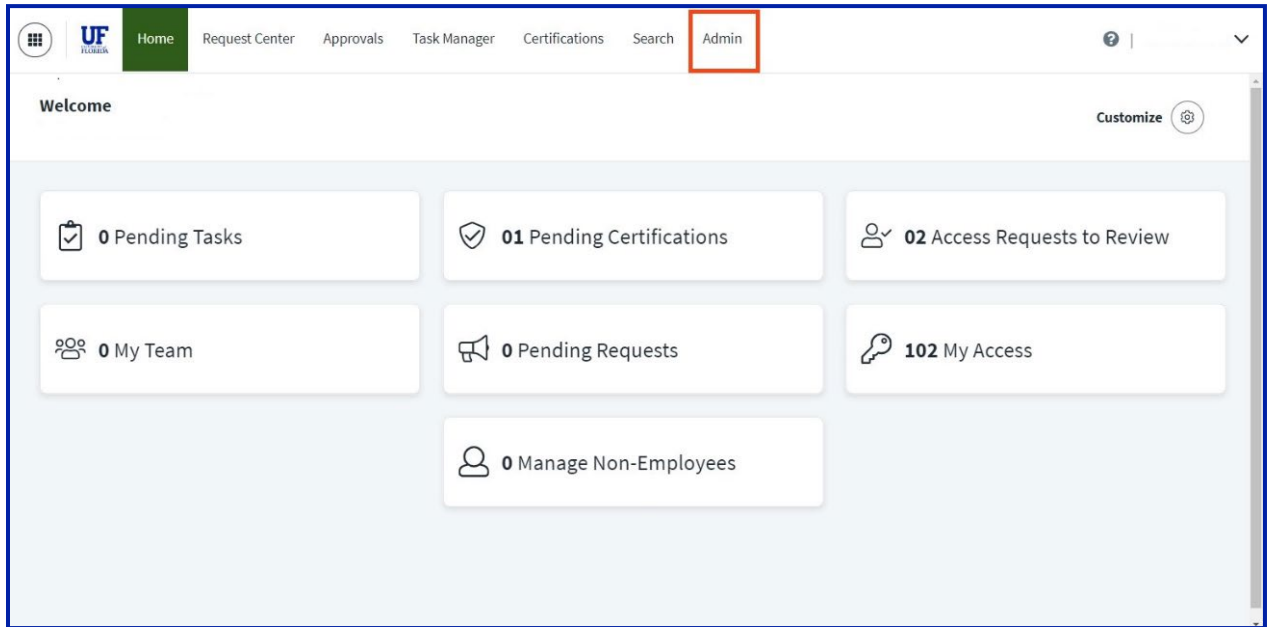
8. Search for the Role(s) the identities will need



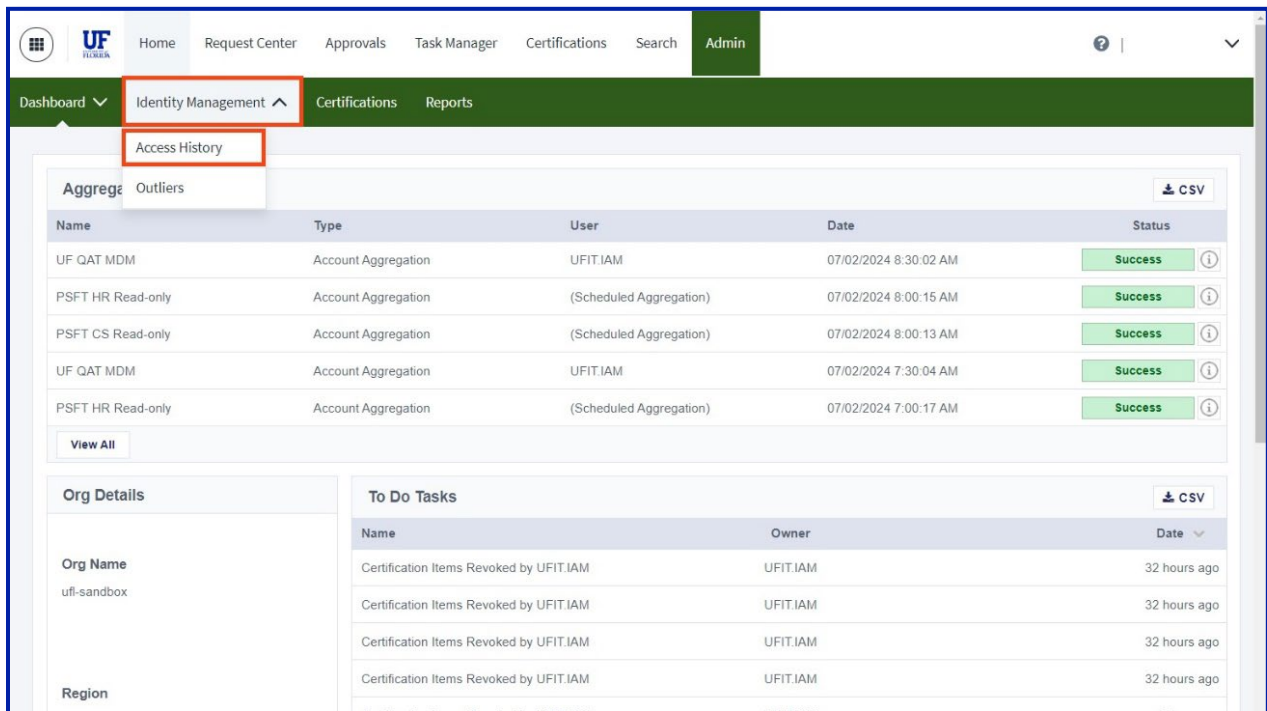
9. Click **Select**
10. Click **Details** to review the requirements of the role: auth area comment, required training, Separation of Duties conflicting roles to avoid, etc.
 - a. (If you do not need to obtain/confirm identity profile data, skip to step 18 on page 8. Otherwise, move to the next step 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.



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

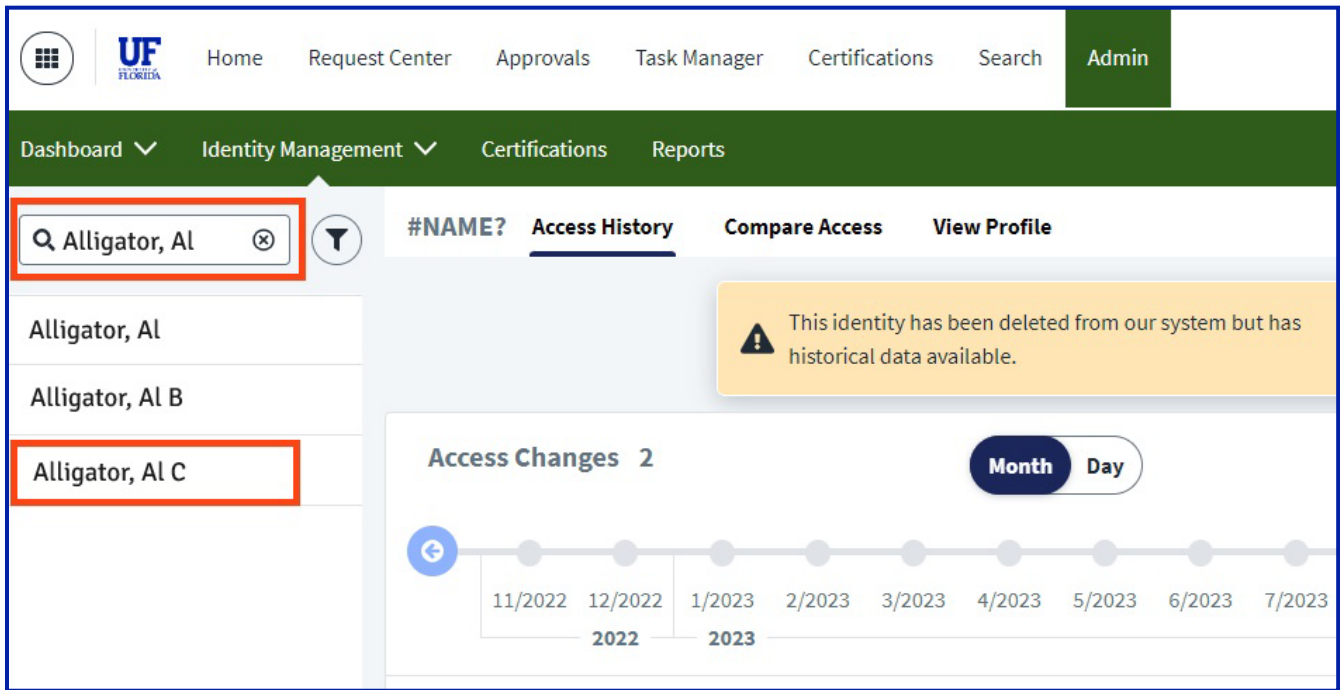


13. Click **Identity Management** and **Access History**.

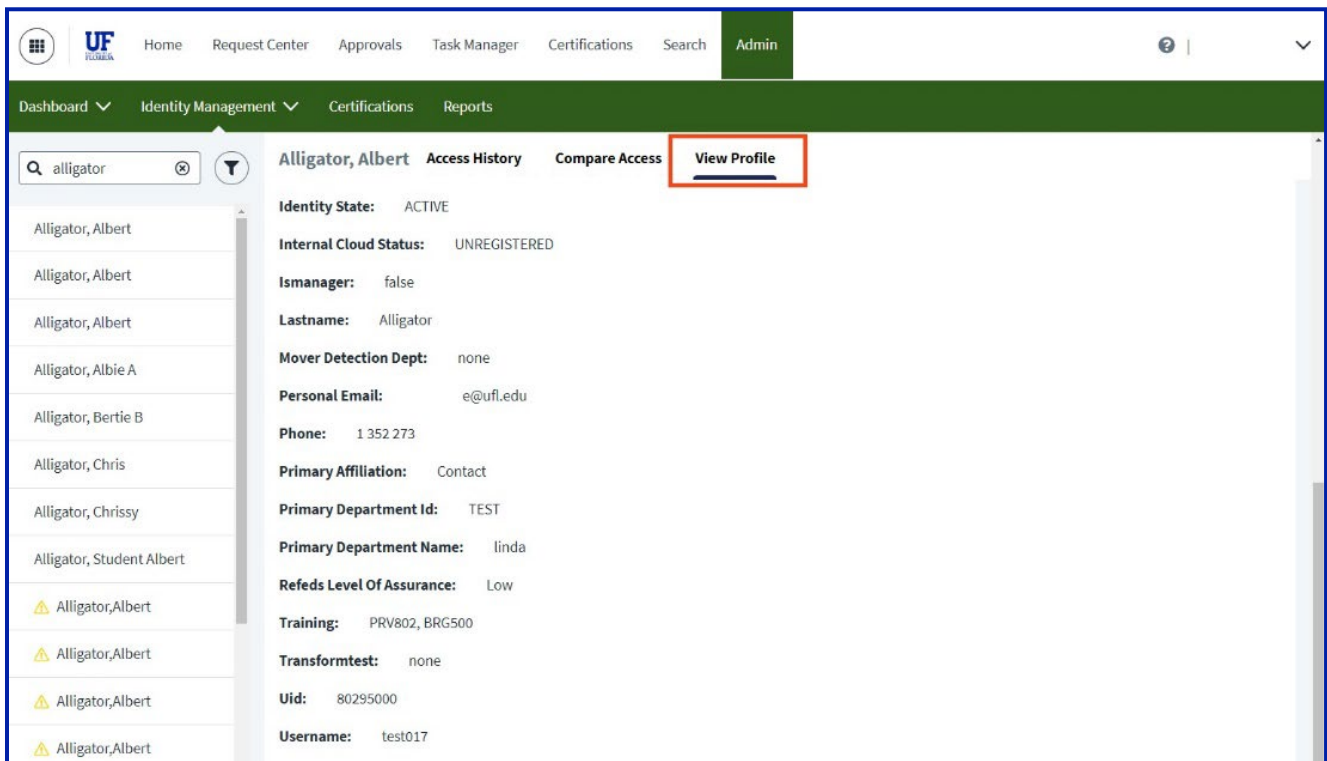


14. Copy & paste the Recipient's name from the first tab; or search using last name (*comma and space*) first name. Click the Recipient's name.

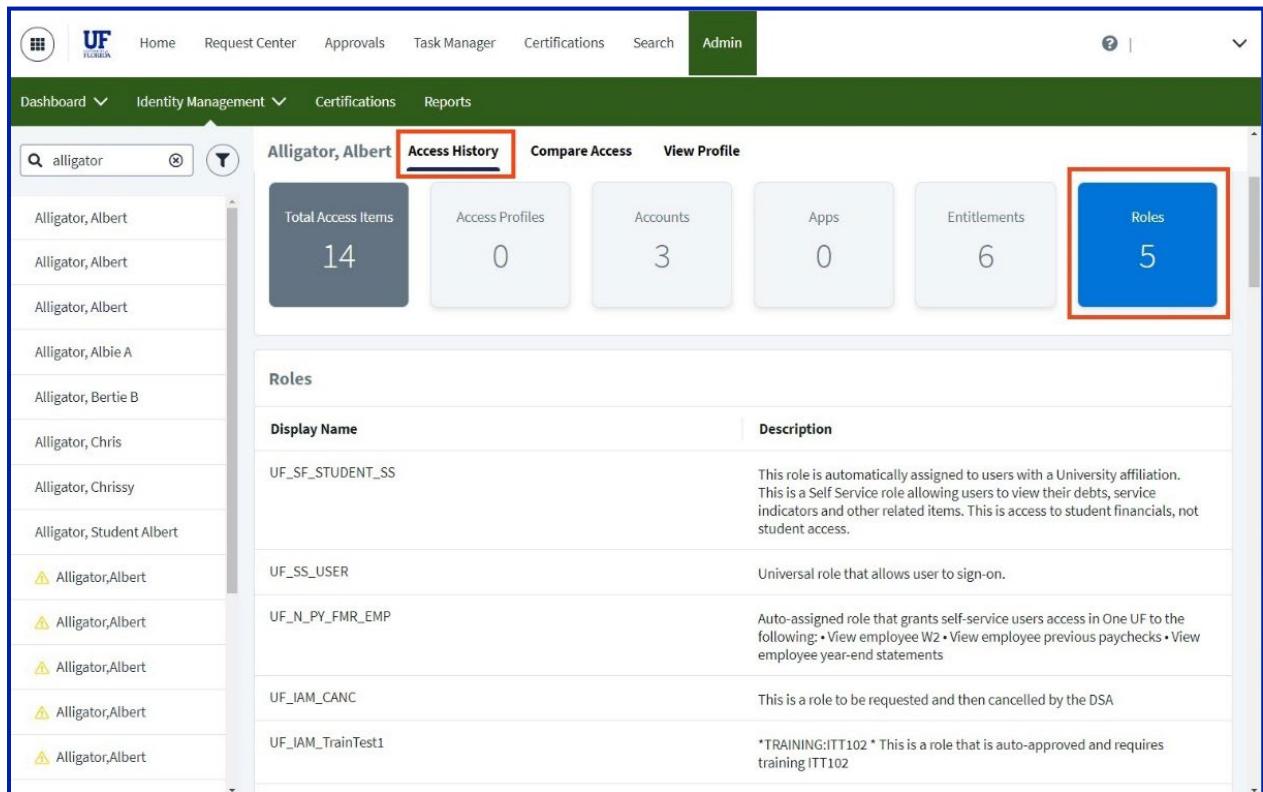
Note: SailPoint uses the identity's "chosen name" as the display name, the identity's legal name will appear in **View Profile**.



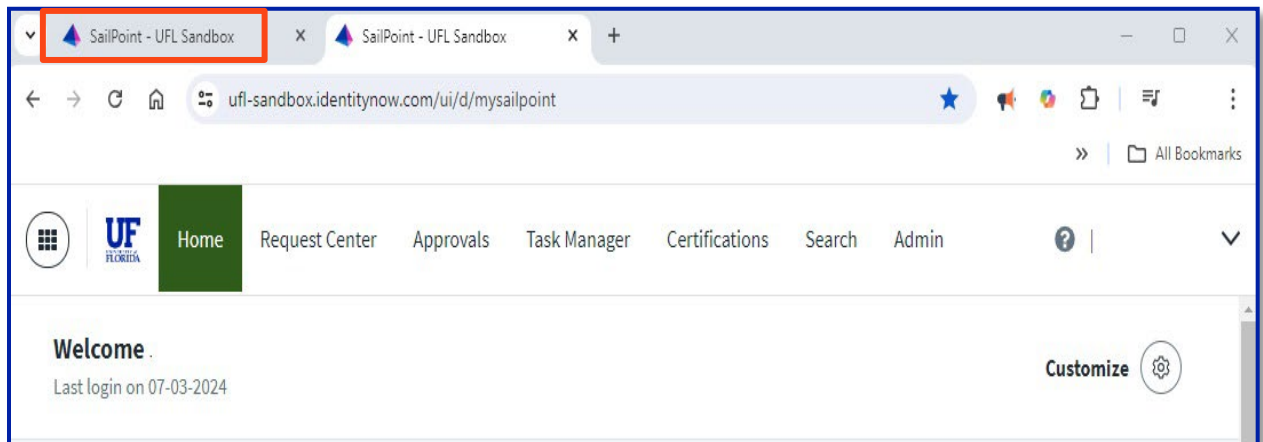
15. Click **View Profile** to review and confirm the Recipient’s information (first & last name, email, Dept ID, Primary Dept ID, phone number, UFID, etc.), and their current training data.



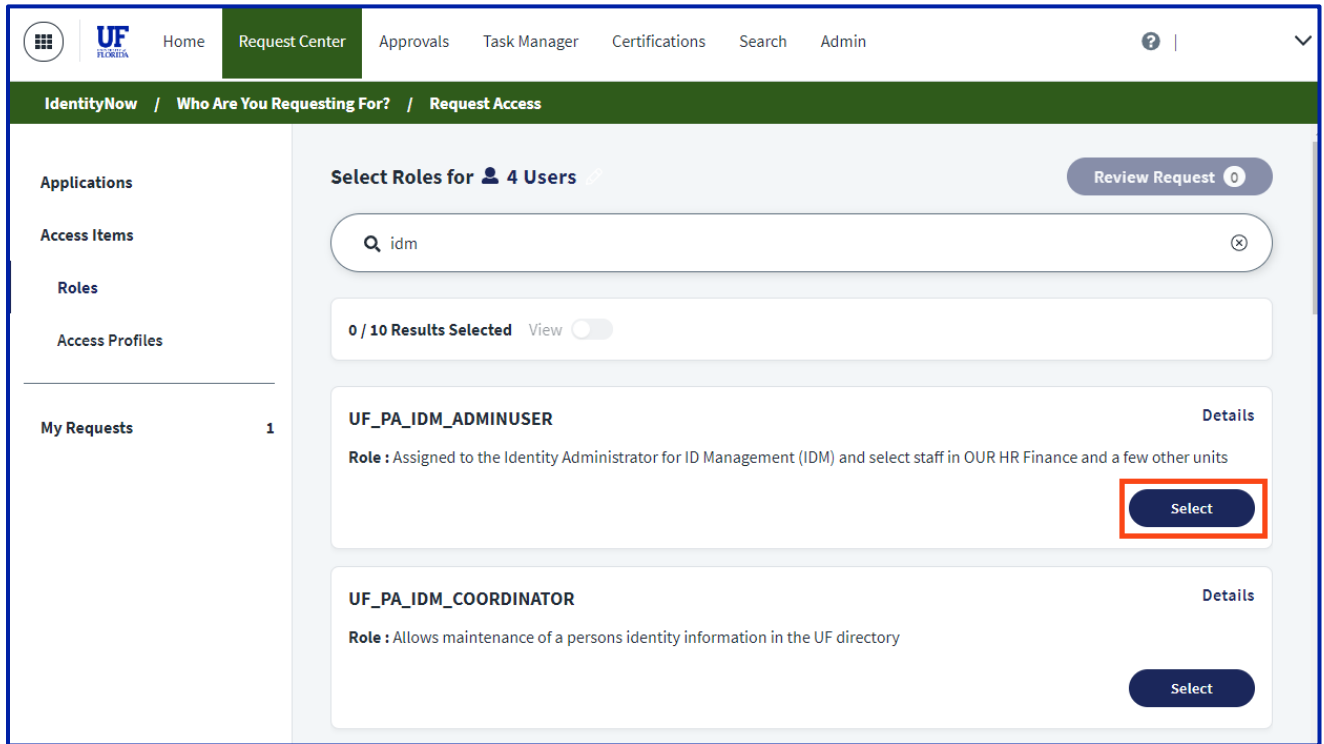
16. Click **Access History** and then **Roles** to review the Recipient’s current roles and confirm that **Separation of Duties (SoD) or conflicting roles** are not assigned, if applicable.



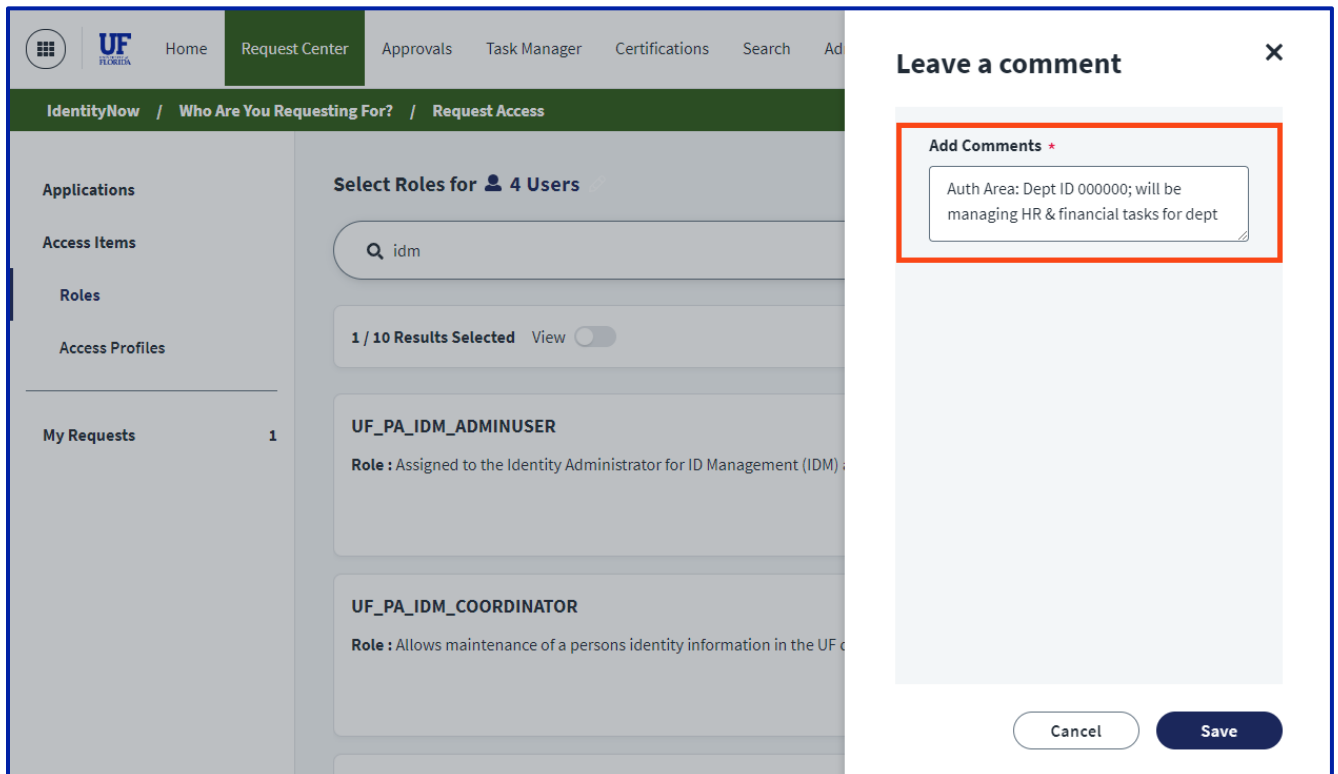
17. Once you’ve obtained all the required identity information, navigate back to the first SailPoint tab on your browser



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



19. Add comment in the text box, as needed. Some roles require an Auth Area comment 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.



20. Click **Save**

The screenshot shows the IdentityNow interface. The main content area is titled "Select Roles for 4 Users" and includes a search bar with "idm" entered. Below the search bar, it indicates "1 / 10 Results Selected" and a "View" toggle. Two roles are listed: "UF_PA_IDM_ADMINUSER" and "UF_PA_IDM_COORDINATOR". A modal window titled "Leave a comment" is open on the right, containing a text area with the comment "Auth Area: Dept ID 000000; will be managing HR & financial tasks for dept". At the bottom of the modal are "Cancel" and "Save" buttons, with the "Save" button highlighted by a red rectangular box.

21. Click **Review Request**

The screenshot shows the IdentityNow interface. The main content area is titled "Select Roles for 4 Users" and includes a search bar with "idm" entered. Below the search bar, it indicates "1 / 10 Results Selected" and a "View" toggle. Two roles are listed: "UF_PA_IDM_ADMINUSER" and "UF_PA_IDM_COORDINATOR". A "Review Request 1" button is highlighted with a red rectangular box. The "UF_PA_IDM_ADMINUSER" role has a "Selected" button, and the "UF_PA_IDM_COORDINATOR" role has a "Select" button.

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

Review Your Request Close

You are requesting 1 item for 4 identities

UF_PA_IDM_ADMINUSER Details

Role: Assigned to the Identity Administrator for ID Management (IDM) and select staff in OUR HR Finance and a few other units

1 Comment Set Expiration Remove

4 Identities

- Gator, Rusty
- Gator, Sharon
- Alligator, Albert
- Dee, Gator

Select Identities

Rows per page 50 1 - 1 of 1 Page 1 of 1

23. Success! message will appear, confirming submission

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

Home Request Center Approvals Task Manager Certifications Search Admin

IdentityNow / Who Are You Requesting For? / Request Access

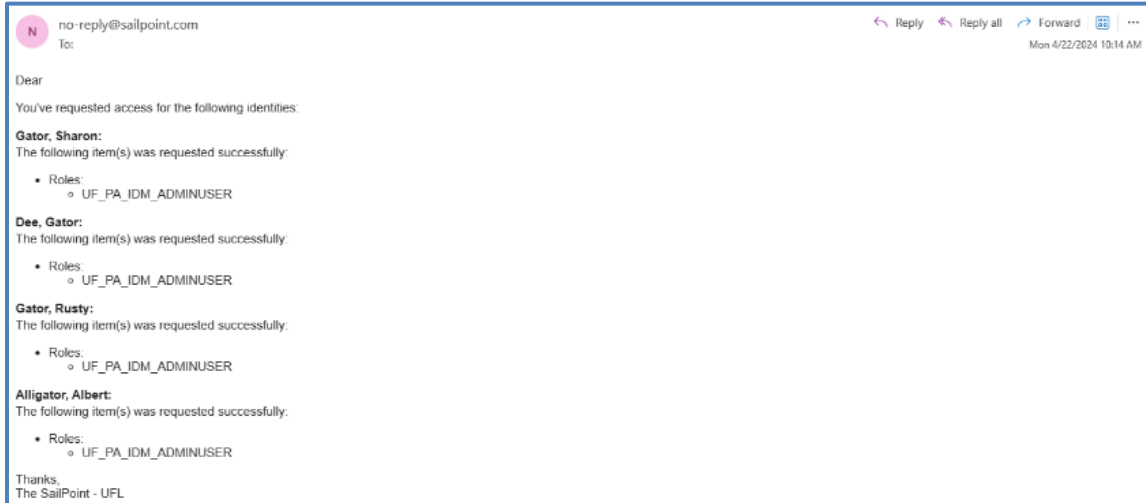
Success!

Your request was submitted.

You'll receive an email when your request is approved or denied.

Submit another request

24. Emails from **UF SailPoint IdentityNow** <sailpoint-no-reply@it.ufl.edu> 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:



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

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Policies and Directives

Identity & Access Management Services
ufit-ars@ad.ufl.edu
identity.it.ufl.edu