



One Identity Manager 8.1.4

Web Portal User Guide

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Legend

 **WARNING:** A WARNING icon highlights a potential risk of bodily injury or property damage, for which industry-standard safety precautions are advised. This icon is often associated with electrical hazards related to hardware.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

One Identity Manager Web Portal User Guide
Updated - 19 October 2020, 07:44
Version - 8.1.4

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Getting started

The Web Portal is part of a web application that is displayed in a web browser. You can use the Web Portal to request and cancel products, and to renew current requests with limited lifetimes. If you own the necessary entitlements, you are able to approve requests and cancellations, perform attestation, view rule violations, and approve or deny exception approvals. Furthermore, you can change your central password and show statistics.

Depending on your role and level of security, you can use the Web Portal to:

- Request access to resources
- Track the progress of requests
- Approve or deny requests made by your employees
- Subscribe to reports
- Manage rule violations
- View reports and statistics on resources or roles assigned to you or your employees

Tips for using the Web Portal

- Enable JavaScript in your browser for the Web Portal to work.
- You can configure and extend the Web Portal using the Web Designer.
- A minimum screen resolution of 1280x1024 pixels is recommended with at least 16-bit color in order to optimize the user interface graphics. A display size of at least 9.7 inches is recommended for mobile displays, for example, when using a tablet.
- Supported browsers:
 - Internet Explorer 11 or later
 - Firefox (release channel)
 - Chrome (release channel)
 - Safari (current version)
 - Microsoft Edge (release channel)

Detailed information about this topic

- [Logging on and off](#) on page 14
- [Managing password questions](#) on page 47
- [Changing contact information](#) on page 52
- [Changing the language](#) on page 53
- [Navigation and use](#) on page 18

Logging on and off

You must be logged onto the system to be able to work with the Web Portal. In order to login, you must know the URL of the Web Portal in your organization. Ask your system administrator for this information.

TIP: If you do not yet have an account, contact your manager.

NOTE: If you have forgotten your password and your account cannot be unlocked with the question-answer function, you can ask your manager for a passcode.

Detailed information about this topic

- [First login/new account](#) on page 14
- [Logging in](#) on page 15
- [Logging in with security keys](#) on page 16
- [Logging off](#) on page 18

First login/new account

If you do not already have a user account, you will have to create a new one.

To log onto the system for the first time

1. In the address line of your web browser, enter the Web address (URL) of the Web Portal to open the login page for the Web Portal.

TIP: By default, the URL is `http://<server name>/<application name>/`, where `<server name>` is the name of the server on which the Web Portal is installed.

2. Click **Create new user account** on the login page.
3. On the **Register a new user** view, complete at least the **Last name** and **First name** mandatory fields and enter your e-mail address.
4. In the field next to **Security code**, enter the code displayed.

TIP: If you cannot clearly identify the code displayed, click **Generate a different**

- | **code** to display a new code.
5. Click **Save**.
When the responsible manager has approved your account, you will receive an e-mail containing a link.
 6. Open the confirmation email and click the link.
 7. On the confirmation page, click **Confirm e-mail address**.
 8. Define your password and your password questions (see also, [Change password](#) on page 49 and [Managing password questions](#) on page 47).
 9. You can then with [log in](#) using this information.

Related topics

- [Logging in](#) on page 15
- [Change password](#) on page 49
- [Managing password questions](#) on page 47

Logging in

Open the Web Portal in a web browser.

If your system is also configured for two-factor authentication, other steps might be required to log in. For more information about logging in with your [security key](#), see [Logging in with security keys](#) on page 16.

To log in to the Web Portal

1. In the address line of your web browser, enter the web address (URL) of the Web Portal.
TIP: By default, the URL is `http://<server name>/<application name>/`, where `<server name>` is the name of the server on which the Web Portal is installed.
2. Enter your full user name in the **Login name** field on the Web Portal's login page.
3. Enter your personal password in **Password**.
4. Click **Connect**.

TIP: If you have forgotten your password, click **Forgot your password? Click here**.

Then you are forwarded to the Password Reset Portal. For more information on this topic, see [Change password](#) on page 49.

Related topics

- [First login/new account](#) on page 14
- [Logging in with security keys](#) on page 16

- [Change password](#) on page 49
- [Managing password questions](#) on page 47

Logging in with security keys

If your system is appropriately configured and you own and have [set up](#) a security key, you can use it to log in to the Web Portal.

To log in to the Web Portal with a security key

1. In the address line of your web browser, enter the web address (URL) of the Web Portal.

TIP: By default, the URL is `http://<server name>/<application name>/`, where `<server name>` is the name of the server on which the Web Portal is installed.
2. On the Web Portal's log in page, enter your login data.
3. Click **Log in**.
4. Follow the instructions (for example, plug your security key into your USB socket and then touch the contact).

You will be automatically logged in.

Related topics

- [First login/new account](#) on page 14
- [Logging in](#) on page 15
- [Security keys \(WebAuthn\)](#) on page 54

Logging in to the Password Reset Portal

The Password Reset Portal helps you to change your main password, change several passwords of different user accounts, manage your password questions, and manage your security keys.

You can log in to the Password Reset Portal in three different ways:

- Use a [passcode](#) that you have received from your manager.
- Answer your personal [password questions](#).
- Use your [user name and personal password](#) to log in to the Web Portal.

To log in to Password Reset Portal using an access code

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**. This opens the Password Reset Portal.
The Password Reset Portal opens.
2. On the **Select how you want to authenticate yourself** page, select the option **I have a passcode** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **Enter your passcode** page, in the **Passcode** field, enter your passcode.
6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.
TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.
7. Click **Next**.

To log in to Password Reset Portal using your password questions

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**.
The Password Reset Portal opens.
2. On the **Select how you want to authenticate yourself** page, select the option **I want to answer my secret password questions** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **Answer your password questions** page, enter the relevant answers to your password questions in the fields.
6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.
TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.
7. Click **Next**.

To log in to Password Reset Portal using your current password

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**.
The Password Reset Portal opens.
2. On the **Select how you want to authenticate yourself** page, select the option **I log in with my current password** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **I log in with my current password** page, enter your login information in

the fields.

6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.

TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.

7. Click **Next**.


Related topics

- [First login/new account](#) on page 14
- [Logging in](#) on page 15
- [Logging off](#) on page 18

Logging off

When you want to finish working with the Web Portal, log off from the system.

To log off from Web Portal

1. Click  | **Log off** in the header.
2. In the **Log Off** dialog, confirm the prompt with **Yes**.

Your logoff was successful.

TIP: Your system may be configured to log you off automatically if you are inactive for a long period of time.

Navigation and use

You use the Web Portal to view and manage data. Some menu are available in the [header](#), on the [start page](#) as well as in the [menu bar](#).

NOTE: What Web Portal functionality is available to the you, depends on the role model stored in the database. Which groups of employees are supplied with which functionality in the standard installation is explained in the following chapters.

Detailed information about this topic

- [Start page](#) on page 20
- [Header](#) on page 20
- [Simple navigation](#) on page 25
- [Searching](#) on page 26
- [Sorting](#) on page 32

- [Bookmarks](#) on page 33
- [Help](#) on page 34
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- [Mobile view](#) on page 46


The user interface layout


The Web Portal user interface is divided into several sections:

Top - header

The [header](#) with the company logo is at the top of the screen. You can use different functions and reach different areas from here.

Top – menu bar

The [menu bar](#) is displayed horizontally in the upper part of the screen and provides different menus and submenus. To reach the [Start page](#), click  **Start page**.

On the top right-hand side of the screen, select  **Settings** to access the **My Settings** view. This page contains other options that you can use to configure your email notification and report settings.

Work area

The work area changes depending on the menu you have called from the navigation.

Related topics

- [Header](#) on page 20
- [Menu bar](#) on page 21
- [Start page](#) on page 20

Start page

Once you have logged in successfully, the start page appears. Displayed across the start page, there are tiles of different sizes, which you can click on. The tiles allow you to access some frequently used menu items or important actions with one click.

Other tiles show statistics or heatmaps. You can also call up this information in full screen mode by clicking **Explore**.




Detailed information about this topic

- [Header](#) on page 20
- [Menu bar](#) on page 21

Header

There are several buttons available to you in the Web Portal's header bar, which make it easier and simpler to access functions and settings. The following table explains, which icons to select to reach the relevant functions and settings.

Table 1: Functions in the header

	<h3>Search</h3> <p>The search helps you to search for various objects. For example, you can quickly and simply search for employees, attestation cases or request procedures. For more information, see Searching on page 26 and Running a search on page 28.</p>
	<h3>Information</h3> <p>Use these menu items to view:</p> <ul style="list-style-type: none">• Pending requests,• Request inquiries,• Pending attestations,• Attestation inquiries,• Pending rule violations,• Pending policy violations <p>and edit them.</p> <p> TIP: The moment this icon goes orange (🔔), you have tasks pending.</p>
	<h3>My Requests</h3> <p>Use these menu items to:</p>

- [Trigger](#) new requests,
- [Display and edit](#) your shopping cart,
- [Renew](#) and [cancel](#) products.

| **TIP:** The moment this icon goes orange (🔥), you have requests to edit.



Personal data

Use these menu items to:

- View your personal data with memberships, responsibilities, and entitlements and to edit setting (for example, your [Password questions](#)),
- [Display](#) your company's address book,
- [Log off](#).



Bookmarks

Show and select your bookmarks here.

This icon is only shown if you have saved bookmarks in the Web Portal.



Help

This menu includes online help, contact to customer service, community links, information about your connection and the product.

Use **Help** to open the context-sensitive help. The help contains the entire contents of the Web Portal User Guide.

Connection opens a dialog with detailed information about your web application connection. The information is divided out on **System users**, **Permissions groups** and **Program functions**.

Menu bar

The menu bar is displayed horizontally in the upper part of the screen and provides different menus and submenus.

Menus are structured by topic. Each menu corresponds to a topic and holds further menu items, which are respective subtopics.

To open a menu

1. In the menu bar, mouse-over a menu.
The menu expands to show more menu items.
2. Click a menu item.

Table 2: Menus in the menu bar


Menu	Menu item	Actions
Request	My requests	<ul style="list-style-type: none"> • Start new requests • Show your request history • Edit requests • Edit templates • Show your shopping cart
	My actions	<ul style="list-style-type: none"> • Manage pending requests • Show the approval history • Manage request inquiries
	Auditing	<ul style="list-style-type: none"> • Display requests of other staff • Show approvals
	Escalation	<ul style="list-style-type: none"> • Edit escalate requests
Attestation	My attestation status	<ul style="list-style-type: none"> • Display your pending attestation cases • Send reminder emails to attestors
	My actions	<ul style="list-style-type: none"> • Show and edit pending attestations • Show the attestation history • Show attestation inquiries
	Auditing	<ul style="list-style-type: none"> • Show all attestation cases
	Governance administration	<ul style="list-style-type: none"> • Show attestation runs • Manage attestation policies
	Escalation	<ul style="list-style-type: none"> • Show escalated attestations
Compliance	My actions	<ul style="list-style-type: none"> • Show and approve pending rule violations • Show historical rule violations • Show and edit pending policy violations • Show historical policy violations
	Auditing	<ul style="list-style-type: none"> • Show rule violations • Show policy violations
	Governance Administration	<ul style="list-style-type: none"> • Show and edit risk index functions • Show compliance information • Show critical object overview


Menu	Menu item	Actions
		<ul style="list-style-type: none"> • Show compliance rules and rule violations • Show company policies and policy violations • Show compliance rules with SAP functions and respective rule violations • Show compliance rules with SAP functions and respective rule violations • Show compliance rule violations of staff with critical SAP functions
Responsibilities	My responsibilities	<ul style="list-style-type: none"> • Show and manage the staff you are responsible for • Show and manage system entitlements • Show and manage business roles • Show and manage system roles • Show and manage departments • Show and manage cost centers • Show and manage locations • Show and manage application roles • Show and manage resources • Show and manage assignment resources • Show and manage multi-request resources • Show and manage multi-requestable/unsubscribable resources • Show and manage software • Show and manage devices
	Delegation	<ul style="list-style-type: none"> • Show, create, and delete delegations • Show delegation history
	Ownerships	<ul style="list-style-type: none"> • Add ownerships • Assign owners
	Auditing	<ul style="list-style-type: none"> • Audit employees • Audit business roles • Audit system roles

Menu	Menu item	Actions
		<ul style="list-style-type: none"> • Audit application roles • Audit departments • Audit cost centers • Audit locations • Audit resources • Audit assignment resources • Audit multi-request resources • Audit multi-requestable/unsubscribable resources • Audit software • Audit (Azure Active Directory, LDAP, SAP R/3, Universal Cloud Interface, UNIX)
	Governance Administration	<ul style="list-style-type: none"> • Show and manage the company structure (organization) • Show and manage employees and their entitlements • Show and edit business roles • Show and manage system entitlements
Calls	New Call	<ul style="list-style-type: none"> • Create calls
	Call history	<ul style="list-style-type: none"> • Show call history • Remove call attachments
Applications		Call stored application


Making approval decisions about pending items

Pending items are normally, requests, inquiries, or attestations.

One way of finding pending items is by selecting the menu **My actions** using  in the header. Pending positions are shown as menu items that you can select. A number next to a menu item indicates the number of pending items of that type and that your action is required to deal with them. This might mean, for example, that you must grant or deny approval to pending requests.

If there are no pending items to deal with or you have already dealt with them all, the white  symbol is displayed.

To make approval decisions about pending items

1. Click  in the header.
2. Select the area for making approval decisions about pending items.
3. On the new page, do the following:
 - Approve pending items by clicking on ☐ next to the position.
 - Deny pending items by clicking on ☐ next to the position.
4. Click **Next**:
5. On the **Approvals** page, click **Save**.

Simple navigation

Simple commands

Table 3: Overview of simple commands

Tab	Navigate between single elements
Enter or, if required, Space	Confirm input
Backspace	Navigate to previous page
Alt+ Left arrow or Alt + Right arrow	Navigate to previous or next page

NOTE: Take into account that not all browsers behave the same. The shortcuts described here were set up with the help of Internet Explorer 9.

Go to start page

Table 4: Overview of key combinations for navigating

TAB	Navigate forward
Shift + TAB	Navigate backwards
Enter key	Execute an action
Search	You can use the tab key to select Search . Once the box is selected, the search entry disappears and you can enter a new term in Search . Confirm your input with Enter.

Simple elements

Table 5: Overview of the controls used

Button	Use the tab key to navigate to the control and press Enter to execute the action.
Link	Navigate to the required link with TAB and press Enter to open a new page or dialog.
Popup	Click Esc to leave the popup window without executing anything. Click Enter to execute. If there is more than one action to execute, navigate with TAB to the desired action and execute with Enter.
Menu	Navigate to the menu using TAB. The selected element changes its color. Press Alt+ Move down or Move up to expand the entire menu. Use the arrow keys to choose between the different elements. Use Tab to leave the menu. You do not need to confirm by pressing Enter or Space.
Input field	Navigate to the desired field. If text input is possible, the cursor blinks and you can write in the field. Use TAB to exit the field. You do not need to confirm by pressing Enter or Space.
Tiles	Use the tab key to navigate to the tile and press Enter to display the page's content.
Checkbox	Use the tab key to navigate to the required checkbox and press Space to enable the checkbox.
Option	Use the tab key to navigated to the required list of options. Use the arrow keys to choose between the different options. Use Tab to leave the list of options.

Installed controls

Table 6: Overview of other controls

Tree view	Use Enter to expand or collapse a tree view. A plus sign next to the tree means it can be expanded by pressing Enter. A minus sign means the element can be collapsed by pressing Enter.
-----------	--

Searching

A lot of views provide the option to search by the current context. For example, when you look at your list of resources, you can search specifically for one resource. You can select the simple search, where you enter a single search string, or the advanced search, where you can apply several parameter to the search.

TIP: The search does not take upper and lower case into account.

There are certain rules that enable a successful global search in the Web Portal. These are described in the following table using examples.

Table 7: Rules with examples for searching

Example	Description
John Doe	Finds John Doe but not John Donut. Search results must contain all of the separate terms in the query. A logical AND is used.
John OR Doe	Finds Jane Doe and John Donut. Placing OR between the search terms, acts as a logical OR operator. The result of this search contain at least one of the two search terms.
John NOT Doe	Finds John but not John Doe. The results of this search do not contain the term that comes after NOT .
J*	Finds John and Joanna. The * functions as a wildcard for any number of characters to complete the term.
Do?	Finds Doe but not Donut. The ? functions as a wildcard for a single character to complete the term.
"John Doe"	Provides results in which the search terms John and Doe follow one another. Results of this search contain the string in quotes as phrase.
John Doe~	Finds Jon Does but also other similar results. A tilde ~ after the search term indicates that the search should also find similar results. The means that incorrectly spelled terms can be found as well. You can specify the level of similarity by adding a number between 0 and 1 (with decimal point) after the tilde ~. The higher the number, the more similar the results.

During the search, the search strings are broken down into tokens by the search index in use. The search terms are compared with these tokens.

Use the **Common | Indexing | IndexNonTokenChars** configuration parameter to specify which delimiters are to be used. The configuration parameter can be extended if certain characters in the search text have linking function.

If the **Common | Indexing | IndexUseLegacyAnalyzer** configuration parameter is enabled, alternative tokenizing is performed also. The alternative method of tokenizing is preferable for long tokens. For example, if the string "Department_01" is a token, the partial string "Department" is considered a token.

The following tokens are named.

Table 8: Tokens for alternative tokenizing

Token	Description with example
Words	Sequence of letters and/or numbers
Enumeration	Words linked by punctuation marks (<code>_</code> / <code>.</code> / <code>,</code>) of which at least every second one contains a number. An example is <code>Department_01</code> . Sequences are also decimal numbers and IP addresses.
Email addresses	An email address is often made up of first name, last name, company name and generic top-level domain (for example <code>.com</code>). The order or spelling of the first and last names may vary (for example, use of initials). The special character <code>@</code> and the punctuation mark <code>.</code> not only separate each part of the email address but also links them so that Examples of email addresses are <code>Ben.King@company.com</code> or <code>C.Harris@company.com</code> .
Host names	For example, <code>website.xyz.com</code>
Acronym	For example, <code>U.S.A.</code>
Apostrophe	For example, <code>O'Reilly</code>
@, & surrounded by letters	For example, <code>Me&you.</code>
Umlauts such as <code>ä</code> , <code>ö</code> , <code>ü</code>	For example, <code>Max Müller.</code>

NOTE: Changing the configuration parameter means rebuilding the search index, which may take some time.



Detailed information about this topic

- [Running a search](#) on page 28
- [Context search](#) on page 29
- [Advanced search](#) on page 29

Running a search

Search is available at all times in the header.

To run a search



1. In the header, enter the search term in the field next to .
2. In the header, click .

The **Search results** view opens, displaying all the results that match your query.

Context search

A context search is context-dependent unlike a regular search, and is available where several entries are listed. For example, **Request history** normally lists several entries and a context search is available above the list.

To run a context search

1. Enter the search term in the field next to .
2. Click .

Any results matching your query are displayed.

Advanced search

Advanced searching is context-dependent, like the context search, but offers various other additional search settings. The advanced search is often found next to the context search and can be opened with a link. You can use the advanced search in the **Request history** view, for example.

To run an advanced search

1. Click **Advanced search** in the view above the list.
The following table lists the possible search settings.
2. Enable the relevant checkboxes next to the criteria you would like to use to limit the search.
3. Click **Search**.

Any results matching your query are displayed.

Table 9: Setting options for advanced search

Category	Setting	Description	Occurs
Display requests	Requests submitted by you for yourself / Requests submitted by the selected employee for himself	If the option is set.	<ul style="list-style-type: none">• Request history• Auditing - <selected employee> - view Requests
	Requests submitted by you for others / Requests submitted by the selected	If the option is set.	

Category	Setting	Description	Occurs
	employee for others		
	Requests submitted by others for you / Requests submitted by others for the selected employee	If the option is set.	
	Requests submitted by other users Submitted requests in the selected employee's organization	If the option is set.	
Filter by request number	Field for number to search for.	Searches for number entered.	<ul style="list-style-type: none"> • Request history • Approval history • Auditing - <selected employee> - view Requests • Auditing - Requests • Auditing - <selected employee> - View Approval - view Approvals • Auditing - Approvals
Request state	Pending	Searches for all pending requests.	<ul style="list-style-type: none"> • Request history • Approval history • Auditing - <selected employee> - view Requests • Auditing - Requests • Auditing - <selected employee> - View Approval - view Approvals • Auditing - Approvals
	Approved	Searches for all approved requests.	<ul style="list-style-type: none"> • Auditing - Requests • Auditing - <selected employee> - View Approval - view Approvals • Auditing - Approvals
	Canceled or denied or dismissed	Searches for canceled or denied or dismissed requests.	<ul style="list-style-type: none"> • Auditing - Approvals
Delegations	Valid from	Specifies the start of the time period.	<ul style="list-style-type: none"> • Delegation history
	Valid until	Specifies the end of the time period.	

Category	Setting	Description	Occurs
	Delegator	Selection of delegator.	
	Delegation recipient	Selection of the delegation recipient.	
	Show never assigned delegations	If the option is set.	

Address book

Open the **Address Book** page using the  | **Address Book** menu item (see [Displaying the address book](#) on page 31).

The address book allows you to list all people in the company. You can use it in the Web Portal to look up phone numbers, locations, or other information about employees. The address book also provides you with a quick overview of an employee details (see [To display an employee's details](#) on page 32).

On the **Address Book** page, you can gather the following information.

Table 10: Address book

Column	Description
Display	Shows the full name and in brackets, the user name of the employee.
Primary location	Shows the employee's primary location.
Primary department	Shows the employee's primary department.

Related topics

- [Displaying the address book](#) on page 31

Displaying the address book

To display the address book

- In the header, click  | **Address Book**.

To display an employee's details

1. On the **Address Book** page, click on an employee.
In the detail view on the right-hand side, you will see the information.
2. In the detail view, click **Overview**.
This opens the employee's overview page. Here you can gather further information about the employee (for example, master data, requests, entitlements, and so on). For more information, see [Displaying information](#) on page 144.

Related topics

- [Address book](#) on page 31
- [Displaying information](#) on page 144

Sorting

A sort function is available to you for all tables.

To sort a table

1. Click in the column header you want to sort.
You will see an ▼ icon to the right of the column name.
2. Click again in the column header to sort in ascending or descending alphabetical order.
This sorts the column as required.
3. Click again in the column header to sort in the opposite order.
This sorts the column as required.

To sort a table by several columns

You can select any column to sort by multiple columns. You can add another column by holding the Ctrl key and clicking with the mouse.

NOTE: The last column selected has the highest priority in the sort order. If you want to sort in a particular order, select this column last. All the columns selected before are included in the sort order.

Table 11: Multiple column sorting

Handling	Description
Select the first column.	Click in the column header.
Select more columns.	Click in the header whilst holding down the Ctrl key.
Sort in the opposite order.	Click again in the header whilst holding down the Ctrl key.

Handling	Description
Cancel the sort order/Resort	Click in the header of any column to apply a new sort order.

Bookmarks

You sometimes have the option to set bookmarks in views in the Web Portal. Bookmarks have the advantage that you can use them to navigate straight to a particular part in the Web Portal when you log in again.

TIP: If you frequently request a particular service item from a service category, for example, you can navigate faster to this service category by setting a bookmark.


Detailed information about this topic

- [Setting bookmarks](#) on page 33
- [Selecting bookmarks](#) on page 33
- [Deleting bookmarks](#) on page 34

Setting bookmarks

MOBILE: This function is not available in the mobile interface.


To set a bookmark

- Click  **Bookmark this page** on the page you would like to bookmark.
The **Bookmark this page** link changes to **Remove bookmark**. The bookmark is displayed on the start page and in the header.

NOTE: Not every page in the Web Portal can be bookmarked.

Selecting bookmarks

To select a bookmark


- Perform one of the following tasks:
 - On the start page, click the required bookmark in the **Bookmarks** tile.
 - In the header row, click  and click the required bookmark.

This navigates to the page you have bookmarked.


Deleting bookmarks

If you there is bookmark that you no longer need, you can delete it from a view at anytime. You can also delete bookmarks on the page that the bookmark references.

To delete a bookmark

1. In the header, click  **Start page**.
2. On the start page, click **More** in the **Bookmark** tile.
3. In the **Bookmark** dialog, click **Delete** next to the bookmark that you want to delete.
4. In the **Delete bookmark** dialog, confirm the alert with **Yes**.

Help

You will find the  Help menu at the right of the screen in the header. Several menu items are shown when you select this menu.

Detailed information about this topic

- [Using the help](#) on page 34
- [Support](#) on page 34
- [Community](#) on page 35
- [Connection](#) on page 35
- [Info](#) on page 35

Using the help

You can use the guide as well as online help to answer questions about the Web Portal. Online help is accessible in the web application and other areas.


To call up help in the Web Portal

- In the header, click  | **Help**.
The One Identity Manager Web Portal User Guide opens as online help.

Support

The support portal is there to give you technical support. There you can find a large number of solutions to different issues.


To open the support portal

- In the header, click  | **Support**.
The support portal opens.

Community

The One Identity Community offers you a forum where you can exchange information and solutions with other users.

To open the One Identity Community forum

- In the header, click  | **Community**.
This opens the One Identity Community forum.

Connection

You can call up information about a database session and view it in the Web Portal.

| **NOTE:** You cannot change any data in the database.


The data connection details are displayed in a dialog window. You can see information about the web application user, permissions groups and the program function allowed.

Information about the user is shown in the **System user** view. Here, you will find out more about the authentication type, user ID, which permissions the user has (read and/or write access), whether the user is a dynamic user and how the user was added.

You can view permissions groups with a description about each group listed on the **Permissions group** view.

A list of program functions with a description is available on the **Program functions** view.

To open the "Connection" dialog.


1. In the header, click  | **Connection**.
2. In **Connection**, click the tab corresponding to the type of information that you would like to view in more detail.

Info

The **About** menu shows you, among other things, information about your currently installed version of the Web Portal and the registered names of the product. It is displayed in dialog containing the following views.

- **About**
Displays the registered trade mark names and the current version of the Web Portal installed.
- **Legal Notices**
Lists components from third-parties included in the Web Portal. The contact data and the component license might also be given.
- **Contact**
This shows the contact data for purchasing queries or other questions.

To open the "About" dialog

1. In the header, click  and then **Info**.
2. Select the view for the information type you want to view in more detail.


Filter

You can find the filter function represented by  in a lot of table columns. It provides you with a selection of different filters.

NOTE: The contents of the filter dialogs vary depending on context. You can filter by text, numeric values, fixed values, such as gender, "yes" or "no", dates, or objects.

MOBILE: This function is only available in the list view of the mobile interface.

To use filter on a column

1. Open a menu which shows tables.
2. Click  on the required column.

Detailed information about this topic

- [Text filters](#) on page 37
- [Number filters](#) on page 37
- [Object filter](#) on page 38
- [Filtering the calendar function](#) on page 38
- [Delete filter](#) on page 39
- [Grouping and ungrouping columns](#) on page 39
- [Show other columns](#) on page 39
- [Saving views](#) on page 40
- [Deleting saved views](#) on page 40

Text filters

You can find a text filter in the **Product** column of the **Request History** view.

To apply filter criteria to text

1. Enter one or more terms in **Filter on....**
2. Select one of the following criteria from the text filter's menu.

Table 12: Other criteria for applying text filters

Filter	Description
All words	This displays all search results, which contain the term in the field.
Starts with	Only results, which start with the given term are displayed.
Ends with	Only results, which end with the given term are displayed.
One or more words	Only results containing at least one of the given terms are displayed.

Number filters

You can find a number filter, for example, in the **Risk index** column in **High Risk Overview**.

To apply filter criteria to numerics

1. Enter a value in the field or use the arrow keys to set a number.
2. Select one of the following criteria from the numeric filter's menu.





Table 13: Other selection criteria for using numeric filters

Filter	Description
greater or equal	Only results with a value the same or higher than the given value are shown.
less or equal	Only results with a value the same or lower than the given value are shown.
Between	Only results with a value between the given values are shown.

Object filter

You can find an object filter, for example, in **My Responsibilities | Employees Primary department**.

To apply an object filter

1. Select **Object filter** in the **Filter on ...** dialog.
The results are shown by default in a hierarchical structure. Unselected objects are identified with .
You can switch to list view using the  icon and back again with .
2. Click the required object.
The selected object is labeled with  and listed under **Selected**.
| NOTE: To deselect an objects, click the object in the detailed content view.
3. Click **Filter on**.
The filter is applied. The matching results are displayed in the view.

Filtering the calendar function

The "Calendar function" filter is, for example, available in the **Request date** column of the **Request History** view.


To apply filter criteria to the calendar function

1. Select one of the following criteria in the context menu next to the field.

Table 14: Other criteria for applying filters to the calendar function

Filter	Description
After	Only displays results after this date.
Before	Only displays results before this date.
Between	Only displays results between these dates. Another field with calendar icons is displayed with this setting.
This week	Only displays results with this week's date.
Last week	Only displays results with last week's date.
This month	Only displays results with this month's date.
This year	Only displays results with this year's date.

2. Perform one of the following tasks:

- Click  and select a date.
- Enter the date in the field.



3. Click **Filter on**.

The filter is applied. The matching results are displayed in the view.

Delete filter

After setting a filter, you can remove it again manually or it is removed automatically when you change views.

To delete a filter


- Perform one of the following tasks:
 - Click  in the filtered column.
 - Click  in the row above the entire table.

Grouping and ungrouping columns

Grouping is offered for views with a large number of entries. You can group columns in the **Auditing** view on the **Attestation policy** column, for example.

| MOBILE: This function is only available in the list view of the mobile interface.

To group by column or ungroup

1. Select the filter in the column you want and click **Group by this column**.
The entries are displayed in groups.
2. Open the group with .
This displays all the entries in the group.
- OR -
3. Delete the filter.
This dissolves the group.

Show other columns

You can blend in other columns you want to see in your view.

| MOBILE: This function is only available in the list view of the mobile interface.

To include other columns in the table

1. Click **View settings | Additional columns**.

This opens **Additional columns**.

2. Enable the checkbox next to the column you wish to display.
3. Click **Apply**.

Now you can see the selected columns in the table and use them.

Saving views

If you have modified a view and wish to use it at a later stage, for example, you can save the view settings.

| **NOTE:** The saved view is only available at the location where you saved it.

To save the current view

1. Click **View settings | Save current view**.

This opens the **Save current view** dialog.

2. Enter a name for the view in the field.
3. Click **Save**.

| **TIP:** You can select and apply the saved view at any time under **View settings**.

Deleting saved views

You can delete saved views in view settings.

| **NOTE:** The saved view is only available at the location where you saved it.

To delete a saved view

1. Click **View settings | Edit list**.

This opens the dialog **Edit view settings**.

2. Click  after the view setting that you want to delete.

The deleted view setting is removed from the dialog and you cannot select it in the menu anymore.

Custom filter conditions

At certain points you can define custom filter conditions. The filter conditions are formulated like a condition (WHERE clause) for a database query.

You can use a wizard to collect the queries. Each condition is displayed in a special control in the wizard.

The wizard is available in different places in the Web Portal (such as **People**).

MOBILE: This function is not available in the mobile interface.

To open the filter wizard

- Click **View settings | Open filter wizard**.

Detailed information about this topic

- [Creating filters using the wizard](#) on page 41
- [Using control elements](#) on page 44
- [Displaying technical names of database columns](#) on page 44
- [Displaying filter conditions as SQL expressions](#) on page 45

Creating filters using the wizard

To create a filter with the wizard, first select a column, edit the conditions and comparison operators. Once these settings have been configured, you can apply the filter.

To create and apply a filter with the wizard

1. Click **View settings | Open filter wizard**.
2. Select the column for the table in the filter wizard.
 - a. Click **At least one entry exists** and specify whether the column should reference or be referenced from other tables.

The following views are available.

Table 15: Views in the filter wizard

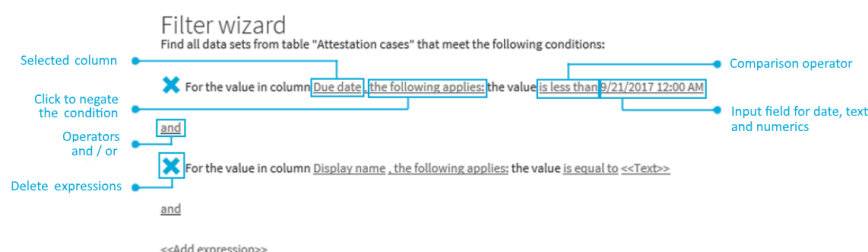
View	Description
Value comparison	Compares the values of the selected columns. These columns are part of the table you want to apply the custom filter to. The advantage of using the WHERE clause wizard is that you can select all the table's columns as opposed to the filter function, which only provides a default selection of columns.
References to other objects	Creates a n:1 relation. Select the desired table B in this view. Several data

View	Description
	records from table A can be assigned to one data record in table B. A data record in table A cannot be assigned more than one data record from table B.
References for assignment tables	Creates a 1:n relation. Each data record in table A can be assigned to several data records from table B and vice versa. These relations are realized through a third Table for realizing assignment tables Assignment table only contains the foreign keys of the other tables A and B.
References from other objects	Creates a 1:n relation. Select the desired table B in this view. Several data records from table B can be assigned to one data record in table A. A data record from table B cannot be assigned to more than one data record from table A.

- b. Select the desired column in the **Filter wizard** view.

This inserts a control for the first condition.

Figure 1: Filter wizard with example conditions



3. Enter the condition and configure the following settings:

- a. Enter the comparison value.

You can enter a date, numeric, or text value. The input of the value type depends on the selected column.

- b. Change the comparison operator.

To change the comparison operator, click the comparison operator "is less than", for example.

The type of comparison operator depends on the column type. The following comparison operators are available.

Table 16: Comparison operators

Value type	operator	Description
Text value	is equal to	Finds the same text value.
	Precedes the word in the alphabet	Finds all results that occur before the entered text in alphabetical order.
	Follows the word in the alphabet	Finds all results that occur after the entered text in alphabetical order.
	Not equal	Finds all results that are not the same as the entered text.
	Is contained in	Finds all results that contain the text value.
	Contains	Finds all results that contain the text value.
	Begins with	Finds all results that begin with the entered text value.
	Ends with	Finds all results that end with the entered text value.
	Is equal or precedes the word in the alphabet	Finds all results that either contain the entered text value or occur before the entered text value in alphabetical order.
	Is equal or follows the word in the alphabet	Finds all results that either contain the entered text value or occur after the entered text value in alphabetical order.
Numerical value	Is less than	Finds all results that are smaller than the entered numerical value.
	Is greater than	Finds all results that are larger than the entered numerical value.
	is equal to	Finds all results that are the same as the entered numerical value.
	Is less or equal	Finds all results that are less than or equal to the entered numerical value.
	Is greater than or equal	Finds all results that are greater than or equal to the entered numerical value.

Value type	operator	Description
	Not equal	Finds all results that are not the same as the entered numerical value.

- c. Change the Boolean value if the option is available in the selected column.
The value **false** is selected by default. If you change the value to **true**, data appears that matches the content of this column.
- d. To negate the defined condition, click **applies**.
The condition statement is reversed and the data displayed after filtering, does not match this condition. This setting is not available if the Boolean option can be set.
- e. Use the operators and or or when applying multiple conditions.

NOTE: Remove the control by clicking **X**.

4. Insert another expression with **<<Add expression>>** and repeat this step if required.
5. Perform one of the following tasks:
 - Apply the filter by clicking **Apply**.
This returns you to the original view where a message alerts you to the active filter wizard.
 - Close the wizard with **Close**.

Using control elements

The filter wizard view can quickly become confusing if several conditions are used with different controls. In this case, you can expand or collapse the conditions with your controls.

To expand or collapse controls.

1. Click **View settings | Open filter wizard**.
2. Perform one of the following tasks:
 - Click **Collapse all** in the **Filter wizard**.
 - Click **Expand all** if the controls are collapsed.

Displaying technical names of database columns

You can display the technical names of database columns instead of the display names.

To display technical names of database columns

1. Click **View settings | Open filter wizard**.
2. Click **Show technical name**.

This displays all the table and column names that occur in the filter wizard with their technical names.

3. If you would like to view the table and column display names again, click **Show display**.

Displaying filter conditions as SQL expressions

In the expert view you can view and edit filter conditions as SQL expressions.

To view a custom filter condition as SQL expression or to write one manually

NOTE: To open the expert view, you must own the role of administrator, auditor, or compliance & security officer.

1. Click **View settings | Open filter wizard**.
2. Click **Expert mode**.

If you have already created a filter, the filter condition is shown in the SQL editor as a SQL expression.

3. Perform one of the following tasks:
 - Edit the SQL expression in the field.
 - Enter the SQL expression in the field.
4. Click **Apply**.

Applies the filter.

Exporting views

You can save a view in PDF or CSV format, or as a website for use as a report. This function is available at different points in your web application. For more information, see [Exporting reports](#) on page 252.

NOTE: You cannot export more than 100 000 data sets. If there are more data set, only the first 100 000 are exported.

To export a view







1. Click **View settings | Export this view**.
This opens the dialog **Export this view**.
2. Select one of the following options:



- **Export as PDF:** exports the view as a PDF file.
 - **Export as CSV:** exports the view as a CSV file.
 - **Display as website:** exports the view as a report in HTML format.
3. (Optional) Enable the following checkboxes:
- **All pages:** All pages of the view were exported. If this setting is not enabled, only the current page is exported.
 - **Remove header:** Removes the first row of the table. This row contains the column names.
- NOTE:** This setting is only available if you selected the option **Export as CSV** in the previous step.
4. Click **Export**.
- Exports the view.

Mobile view

The Web Portal is designed for use with desktops computers and mobile devices. The views are adjusted automatically. In the mobile view, some functions are limited or not at available at all.

Table 17: Handling options for mobiles

Action	Handling
Open menu bar	<p>The menu that you find horizontally under the header in the desktop version is opened on mobile devices as follows:</p> <ol style="list-style-type: none"> 1. Press . List lists the menus under each other. 2. Press  next to a menu. This displays other menu items.
Display extended functions/header	<p>You open the functions and settings in the header toolbar (such as search) for mobile devices as follows:</p> <ol style="list-style-type: none"> 1. Press . Menus are displayed next to each other. 2. Press on one of the following icons: <ul style="list-style-type: none"> • : Opens search. • : Contains the menus My profile, My settings, My processes, Telephone book and Log off. • : Opens your shopping cart without requests.

Action	Handling
	<ul style="list-style-type: none"> • : Shows any saved bookmarks. • NOTE: Replace this text with a description of a feature that is noteworthy. • : Contains the menus Help, Support, Community, Connection and Info.

Heatmaps and statistics in the mobile view

The following handling options apply for heatmaps and statistics in the mobile view.

Table 18: Handling options for heatmaps and statistics

Action	Handling
Show tooltip	Tap on the statistic or the diagram.
Display more details about the statistic/diagram in the dialog	Double-tap on the statistic or the diagram.
Display a tooltip for a heatmap rectangle	Tap the heatmap's rectangle.
Zoom in on heatmap	Double-tap on the heatmap.


Managing password questions

If you forget your password, you can change it at any time in the Web Portal. For more information, see [Change password](#) on page 49. To do this, you need to set three separate questions that only you can answer.

If your password questions are incorrectly answered, you are locked out. You can reset locked password questions at any time. Depending on how the Web Portal is configured, password questions can be deleted even after they have been used correctly.


NOTE: The reminder to set a password question is shown as a tile on the start page. It is shown there until you have set your password questions.

To create new password questions


1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Password** tile.
3. On the **Password questions** page, click **New question**
4. In the **New password question**, enter the following:

- **Secret question:** Enter your question.
 - **Secret answer:** Enter your answer to the (above) question.
 - **Confirm secret answer:** Enter your answer to the question again.
5. Click **Apply**.
 6. On the **Password questions** page, click **Save**.

To edit password questions


1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Password** tile.
3. On the **Password questions** page, next to the password question that you want to edit, click **Edit**.
4. In the **Password question** dialog, enter the following:
 - **Secret question:** Enter your question.
 - **Secret answer:** Enter your answer to the (above) question.
 - **Confirm secret answer:** Enter your answer to the question again.
5. Click **Apply**.
6. On the **Password questions** page, click **Save**.

To delete password questions

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Password** tile.
3. On the **Password questions** page, next to the password question you want to delete, click **Edit**.
4. In the **Password question** dialog, click **Delete**.
5. In the **Delete password question** dialog, confirm the prompt with **Yes**.
6. On the **Password questions** page, click **Save**.

To unlock password questions

TIP: On the **Password questions** page, locked password questions are labeled with **(locked)**.

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Password** tile.
3. On the **Password questions** page, next to the password question you want to unlock, click **Edit**.
4. In the **Unlock password question** dialog, confirm the prompt with **Yes**.
5. On the **Password questions** page, click **Save**.

Related topics

- [Change password](#) on page 49

Change password

You can use the Password Reset Portal to change your central password or change multiple passwords for various user accounts.

You can change your password(s) in 2 steps:

1. [Log in](#) to the Password Reset Portal.
2. [Change](#) the relevant password(s).

Step 1: Log in to the Password Reset Portal

There are three ways to log in to the Password Reset Portal in order to change your password:

- Use a [passcode](#) that you have received from your manager.
- Answer your personal [password questions](#).
- Use your [user name and personal password](#) to log in to the Web Portal.

To log in to Password Reset Portal using an access code

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**.
The Password Reset Portal opens.
2. On the **Select how you want to authenticate yourself** page, select the option **I have a passcode** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **Enter your passcode** page, in the **Passcode** field, enter your passcode.
6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.
TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.
7. Click **Next**.
8. Proceed as described under [Step 2: Change password](#) on page 50.

To log in to Password Reset Portal using your password questions

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**.

The Password Reset Portal opens.

2. On the **Select how you want to authenticate yourself** page, select the option **I want to answer my secret password questions** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **Answer your password questions** page, enter the relevant answers to your password questions in the fields.
6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.

TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.

7. Click **Next**.
8. Proceed as described under [Step 2: Change password](#) on page 50.

To log in to Password Reset Portal using your current password

1. On the Web Portal's login page, click **Manage your passwords** or **Forgot your password?**.

The Password Reset Portal opens.

2. On the **Select how you want to authenticate yourself** page, select the option **I log in with my current password** next to **Authentication method**.
3. In the **User name** field, enter your user name.
4. Click **Next**.
5. On the **I log in with my current password** page, enter your login information in the fields.
6. In the field below **Enter the security code**, enter the CAPTCHA code displayed.

TIP: If you cannot clearly identify the CAPTCHA code displayed, click **Generate a different code**. A new CAPTCHA code is then generated.

7. Click **Next**.
8. Proceed as described under [Step 2: Change password](#) on page 50.

Step 2: Change password

After you have performed the steps from section [Step 1: Log in to the Password Reset Portal](#) on page 49, the **Manage My Passwords** page is displayed, and you can now change your central password or the passwords for user accounts to which you have access.

To change the passwords for your personal user accounts or the passwords of other user accounts

1. On the **Manage my passwords** page, select the option **I want to reset one or more passwords**.
2. Perform one of the following tasks:
 - To change the passwords for your personal user accounts, click ► next to **Personal accounts**.
 - To change the passwords of other user accounts, click ► next to **Other accounts**
3. Select the check box next to the user accounts for which you want to change the password.
4. Click **Next**.
5. On the **Set a new password** page, enter the password you wish to use in the **New password** field.

TIP: Below the field, you can see how secure your new password is.
To display your company's password specifications, click **Password policy**.
6. In the **Repeat the password** field, enter the password again.
7. Click **Next**.

The password is reset for the previously selected user accounts.
8. On the **Success** page, click **Log off**.

To change the central password

1. On the **Manage my passwords** page, select the option **I want to reset my central password**.
2. Click **Next**.
3. On the **Set a new password** page, enter the password you wish to use in the **New password** field.

TIP: Below the field, you can see how secure your new password is.
To display your company's password specifications, click **Password policy**.
4. In the **Repeat the password** field, enter the password again.
5. Click **Next**.

The central password is reset.
6. On the **Success** page, click **Log off**.

Related topics


- [Managing password questions](#) on page 47

Changing contact information

You can update your contact information at any time.

NOTE: You cannot edit light gray boxes.


To update your contact information

1. In the header, click  | **My Profile**.
2. Click **Contact data**.

NOTE: Users with other subidentities in addition to their main identity can use the **Identity** selection field in the **Contact data** view to select identities.

Changes to their contact data only affects the selected identity.

This also applies to creating reports. If you create a report it is generated for the selected identity.

3. Add or correct the entries in the various fields.
4. Click **Change** next to **Country**.
The **Country** dialog opens.
5. (Optional) Click the filter to limit your search for the required country.
6. Click the country you would like from the list.
The dialog closes and **Contact Data** is displayed.
7. Click  next to **Picture**.
This opens **Picture**.
8. Click **Browse...** to find a photo.
The selected image and other instruction are displayed in the dialog.
NOTE: If the photo is greater than 10 KB, you will have to crop the image.
9. (Optional) Hold the mouse over the image until a cross cursor appears, left-click and drag the mouse over the image to select the required area.
10. (Optional) **Crop to selection**.
11. Click **Apply**.
The dialog closes and **Contact Data** is displayed.
12. Click **Save**.


Editing Active Directory user accounts

You can edit your Active Directory user accounts at any time once you have logged in to the system and the user data has loaded.

NOTE: This function is only available if Active Roles Module is installed. This module

references Active Roles extensions in Active Directory user accounts.


To edit your Active Directory user accounts

1. In the header, click  | **My Profile**.
2. Click **Active Directory user accounts**.
3. Enable the required Active Directory user account, if several are available.
4. Edit the fields or add new ones.
5. Save the changes.

Changing the language


In Web Portal, you can specify which language you want to use for the Web Portal.

To change the language for the Web Portal

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click **Contact data**.
3. On the **Personal data** page, click **Assign** or **Change** next to the **Language** field.
4. In the **Language** dialog, select the language you want to use for in the Web Portal.
5. On the **Personal data** page, click **Assign** or **Change** next to the **Language for value formatting** field.
6. In the **Language for value formatting** dialog, select the language you want to use for date and number formats. For example, German dates are displayed in the format DD.MM.JJJJ (24.12.2020) and in English format MM/DD/JJJJ (12/24/2020).
7. On the **Contact data** page, click **Save**.

The changes will take effect as soon as you call a new page or refresh the page.

NOTE: If you have not explicitly assigned a language in the Web Portal, the language used by your browser will be adopted.

TIP: You can change the language of the current session in the **Language** dialog under the  menu.

Security keys (WebAuthn)

Open **Security key** page, using  | **My profile** | **Security keys** (see [Displaying security keys](#) on page 55).

One Identity offers you the option to log in, simply and securely, to One Identity Manager web applications with help of (physical) security keys. If your system is configured for it and you own security keys like this, you must use the security key when you enter your password to log in to a web application (for example, to the Web Portal). These security keys support the W3C standard **WebAuthn**.

IMPORTANT: The WebAuthn standard is NOT supported in Internet Explorer. Therefore, use another browser if you want to log in to One Identity Manager web application using security keys.

For more information about how you log in to the Web Portal with the help of security keys, see [Logging in with security keys](#) on page 16.

If you lose your security key or you cannot use it for any other reason, you can set up a new one using a passcode in the Password Reset Portal (see [Setting up security keys](#) on page 56).

On the **Security keys** page, [view](#) your security keys, [set up](#) new security keys, [edit](#) security keys and [delete](#) security keys.

The following tables provide you with an overview of the different functions on the **Security keys** page.

Table 19: Security keys

Column	Description
Registered	Shows you the date on which the key was registered.
Last used	Shows you the date on which the security key was last used.
Times used	Shows you how often the security key has been used.

Table 20: Controls

Control	Description
Edit	Use this button, to edit the respective security key.

Control	Description
Delete	Use this button to delete the respective security key.
New security key	Use this button to set up a new security key.


Related topics

- [Logging in with security keys](#) on page 16
- [Displaying security keys](#) on page 55
- [Setting up security keys](#) on page 56
- [Editing security keys](#) on page 56
- [Deleting security keys](#) on page 57

Displaying security keys

You can display your security keys at any time.

To display your security keys in the Web Portal

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Security keys** tile.
This opens the **Security keys** page and shows you your security keys and details.

To display your security keys in the Password Reset Portal

1. Log in to the Password Reset Portal (see [Logging in to the Password Reset Portal](#) on page 16).
2. On the **Manage my passwords** page, select the **I want to manage my security keys** option.
This will display your security keys and details.

Related topics


- [Security keys \(WebAuthn\)](#) on page 54
- [Setting up security keys](#) on page 56
- [Editing security keys](#) on page 56
- [Deleting security keys](#) on page 57

Setting up security keys

You can set up or register new security keys at anytime.

NOTE: To set up a security key, you require a physical key that you can connect to your computer by USB or NFC, for example.

To set up a security key in the Web Portal

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Security keys** tile.
3. On the **Security keys** page, click **New security key**.
4. Follow the instructions.

This sets up the security key. On the [Security keys](#) page, you can **edit** the security key at anytime.

To set up a security key in the Password Reset Portal

1. Log in to the Password Reset Portal (see [Logging in to the Password Reset Portal](#) on page 16).

TIP: If you loose your security key or you cannot use it for any other reason, you can set up a new one using a passcode in the Password Reset Portal. To do this, you must ask your manager for a passcode and use it to log in to the Password Reset Portal.

2. On the **Manage my passwords** page, select the **I want to manage my security keys** option.
3. Click **New security key**.
4. Follow the instructions.

This sets up the security key. You can [edit](#) the security key at anytime.


Related topics

- [Security keys \(WebAuthn\)](#) on page 54
- [Displaying security keys](#) on page 55
- [Editing security keys](#) on page 56
- [Deleting security keys](#) on page 57

Editing security keys

You can edit security keys at anytime.

To edit a security key in the Web Portal

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Security keys** tile.
3. On the **Security keys** page, under the security keys you want to edit, click **Edit**.
4. In the **Edit security key** dialog, in the **Display name** field, enter a name for the security key.
5. Click **Save**.

To edit a security key in the Password Reset Portal

1. Log in to the Password Reset Portal (see [Logging in to the Password Reset Portal](#) on page 16).
2. On the **Manage my passwords** page, select the **I want to manage my security keys** option.
3. Under the security keys you want to edit, click **Edit**.
4. In the **Edit security key** dialog, in the **Display name** field, enter a name for the security key.
5. Click **Save**.

Related topics


- [Security keys \(WebAuthn\)](#) on page 54
- [Displaying security keys](#) on page 55
- [Setting up security keys](#) on page 56
- [Deleting security keys](#) on page 57

Deleting security keys

If you no longer need your security key or you have lost it, you can delete it at anytime.

NOTE: If you only have one key left, you cannot delete it. Your last security key can only be deleted by an employee administrator. For more information about how to delete WebAuthn security keys as an employee administrator, see the *One Identity Manager Identity Management Base Module Administration Guide*.

To delete a security key in the Web Portal

1. In the header, click  | **My Profile**.
2. On the **Overview** page, click the **Security keys** tile.
3. On the **Security keys** page, under the security keys you want to delete, click **Delete**.
4. In the **Security key** dialog, confirm the prompt with **Yes**.

To delete a security key in the Password Reset Portal

1. Log in to the Password Reset Portal (see [Logging in to the Password Reset Portal](#) on page 16).
2. On the **Manage my passwords** page, select the **I want to manage my security keys** option.
3. Under the security keys you want to delete, click **Delete**.
4. In the **Security key** dialog, confirm the prompt with **Yes**.



Related topics

- [Security keys \(WebAuthn\)](#) on page 54
- [Displaying security keys](#) on page 55
- [Setting up security keys](#) on page 56
- [Editing security keys](#) on page 56

Requests

In the **My Requests** menu, you can run various actions and obtain information. The following tables provide you with an overview of the menu items and actions that can be executed here.

Table 21: Menu items for "Request"

Menu	Menu item		Action	Description
Request	My requests		New Request	Select and request products from different service categories.
			Request history	Display any requests triggered in the past.
			Editing requests	Extend or unsubscribe active requests.
			Maintaining templates	Edit your own or system request templates.
			Shopping cart	Display the shopping cart and your save for later list.
	My actions		Pending requests	Approve pending requests
			Approval History	Display any approved or denied past requests.
			Request inquiries	Display submitted request inquiries within the scope of an approval workflow.
	Auditing		Request	View all requests made within a specific period.
			Approval	View all requests where a particular employee was involved in the approval decision.
Escalation				Edit escalated requests.

NOTE: You can request a variety of products depending on the entitlements assigned to you.

You can apply the following requests:

- Groups
- Membership in roles
- Access to a file system or SharePoint resource
- Every other resource in your area

A predefined workflow is triggered when after you apply a request. Although the given workflow may be different, what generally applies is:

- Your request is forwarded to an approver.
- An approved request is forwarded to the employee responsible for processing.
- You are notified whether your request is granted or denied.

Detailed information about this topic

- [My requests](#) on page 60
- [My actions](#) on page 85
- [Auditing](#) on page 97
- [IT Shop escalation](#) on page 98

My requests

In **My requests**, you can execute various actions to do with the requests you manage.

Detailed information about this topic





- [Making requests](#) on page 60
- [Request history](#) on page 69
- [Editing requests](#) on page 71
- [Maintaining templates](#) on page 73
- [Shopping cart](#) on page 76

Making requests


A request process is triggered when you request a product. Whether you are authorized to request a product depends on your role and your permissions. Managers or other authorized users can make request for other employees in their name.

There are products in the list that are marked with an icon. The meanings of these icons are explained in the table below with relevance to the product.

Table 22: Request status

Icon	Status
	The product was requested and has already been assigned. You cannot make another request at the moment.
	The product was already requested or it is not currently available. It cannot be requested at the moment.
	A pending request already exists for this product. You cannot repeat the request at the moment.
	<p>The product was already assigned to the user.</p> <p>NOTE: The product assignments can be inherited, for example. It is not possible to make another request for this product. If the request is repeated, the status changes to This product has already been requested.</p>

To request products


1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, do the following:
 - In the **Find a service item** field, enter the name of the required product and click .
 - OR -
 - Click the required service category.

The relevant products are displayed.

TIP: If you want to change the selected service categories, click **Change service category** and then click the service category you require.

4. (Optional) If the service category contains subcategories, click the selection list followed by the subcategory.
The products contained in the subcategory are listed.
5. (Optional) To summarize the main and subcategories in a list, enable the option **Include child categories**.
6. Perform one of the following tasks:
 - Right-click **Add to cart** next to the required product.
 - OR -
 - Enable the checkbox next to the required products and click **Add to cart** below the list.

TIP: If you have selected a product upon which other products are dependent, a

- | dialog opens to allow you to request these products along with the others.
7. (Optional) Perform the following steps on the **My shopping cart** page.
 - a. Click a request.
 - b. Enter further details on the request in the area to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.
 8. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.
 9. On the **My Shopping Cart** page, click **Submit**.
 10. In the **Submit shopping cart** dialog, click **Yes**.

Detailed information about this topic

- [Requesting from templates](#) on page 62
- [Requesting through a reference user](#) on page 63
- [Request for other employees](#) on page 64
- [Making requests for subidentities](#) on page 65
- [Requesting privileged access](#) on page 68


Requesting from templates

You can create requests from your own templates or system templates. This helps simplify proper provisioning for a particular job or function. For example, a template may contain all the products a new employee needs to get started. If you use a template for a request, you are not obliged to request all the products in the template. You only have to select the products you want from the template. For more information, see [Maintaining templates](#) on page 73.

To request products using a template

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, on the bottom right, click **Actions | Select a request template**.
4. In the **Choose a template** dialog, next to the required request template, click **Add to cart**.

TIP: If you want to display all of the content of the request templates, click ► next to the request template.

5. (Optional) Perform the following steps on the **My Shopping Cart** page.
 - a. Click a request.
 - b. Enter further details on the request in the area to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.
6. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.
7. On the **My Shopping Cart** page, click **Submit**.
8. In the **Submit shopping cart** dialog, click **Yes**.


Requesting through a reference user

Use this option to request products that are currently being requested for a selected employee (reference user).

Products you cannot request are marked with a red cross in the product view.

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, below right click **Actions | Select a reference user**.
4. In the **Select an employee** dialog, click the listed employee whose requests you would like to reproduce.

NOTE: More information can be added to the list of employees. Click **View settings | Additional columns** and select the information you require from the dialog.

A new page lists requests, memberships, and entitlements for the selected employee.
5. In the **Requests for <Employee name>** window, enable the products that you would also like to request.
6. Click **Add to cart**.
7. (Optional) Perform the following steps on the **My shopping cart** page.
 - a. Click a request.
 - b. Enter further details on the request in the section to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.
8. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.

9. On the **My Shopping Cart** page, click **Submit**.
10. In the **Submit shopping cart** dialog, click **Yes**.

Request for other employees

You can make requests for other employees (such as department managers). You can only request products from the shops where the employee is a customer and for which you are responsible.

| NOTE: You can filter the list of recipients. For more information, see [Filter](#) on page 36.


| TIP: You can also order products for other employees directly from the shopping cart.

To make a request for another recipient

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, click **Change** next to the **Recipient** field.
4. In the **Recipients** dialog, click the employees in the list for which you would like to request products.

| NOTE: More information can be added to the list of employees. Click **View settings | Additional columns** and select the information you require from the dialog.

The selected employees are displayed in a list to the right.

5. Click **Close**.
6. On the **Request** page, do the following:
 - Enter the product name in the **Find a service item** field and click .
 - OR -
 - Click the required service category.

The relevant products are displayed.

| NOTE: Grouped service categories are displayed with ▼ and offer other selection options.

| TIP: If you would like to change the selected service category or return to the **Request** section, click .

7. (Optional) If the service category contains subcategories, click ▼ and then subcategory.

The products contained in the subcategory are listed.

8. (Optional) To summarize the main and subcategories in a list, enable the option


Include child categories.

9. Perform one of the following tasks:

- Right-click **Add to cart** next to the required product.
- OR -
- Enable the checkbox next to the required products and click **Add to cart** below the list.

TIP: If you have selected a product upon which other products are dependent, a dialog opens to allow you to request these products along with the others.

10. (Optional) Perform the following steps on the **My shopping cart** page.

- a. Click a request.
- b. Enter further details on the request in the area to the right.
- c. Click .
- d. Repeat these steps where necessary for other orders.

11. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.

12. On the **My Shopping Cart** page, click **Submit**.

13. In the **Submit shopping cart** dialog, click **Yes**.

Related topics

- [Requesting from templates](#) on page 62

Making requests for subidentities

Requests can be made for subidentities in the same manner as for other recipients. If you are logged in to the Web Portal with your main identity, you can trigger a request for yourself and for your subidentities at the same time. If you are logged in with your subidentity, you can only make requests for the current subidentity.

To request a subidentity

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, click **Change** next to the **Recipient** field.
4. In the **Recipients** dialog, click the subidentities in the list for which you would like to request products.


NOTE: More information can be added to the list of employees. Click **View settings | Additional columns** and select the information you require from the

dialog.


The selected subidentities are displayed in a list to the right.


5. Click **Close**.


6. On the **Request** page, do the following:

- Enter the product name in the **Find a service item** field and click .
- OR -
- Click the required service category.

The relevant products are displayed.

NOTE: Grouped service categories are displayed with  and offer other selection options.

TIP: If you would like to change the selected service category or return to the **Request** view, click .

7. (Optional) If the service category contains subcategories, click  and then subcategory.

The products contained in the subcategory are listed.


8. (Optional) To summarize the main and subcategories in a list, enable the option **Include child categories**.

9. Perform one of the following tasks:

- Right-click **Add to cart** next to the required product.
- OR -
- Enable the checkbox next to the required products and click **Add to cart** below the list.

TIP: If you have selected a product upon which other products are dependent, a dialog opens to allow you to request these products along with the others.

10. (Optional) Perform the following steps on the **My shopping cart** page.

- a. Click a request.
- b. Enter further details on the request in the area to the right.
- c. Click .
- d. Repeat these steps where necessary for other orders.

11. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.

12. On the **My Shopping Cart** page, click **Submit**.


13. In the **Submit shopping cart** dialog, click **Yes**.

Displaying and requesting other people's products

You can display and request products that other people from your surroundings have already requested. As a manager, you can also see products from your team's peer groups. This way, you have a quick method of requesting products that are important to you or your team members.

TIP: A peer group contains all the people that have the same manager or the same primary or secondary department as the requester.

To request products for another employee

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click the **Start a new request** tile.
3. (Optional) If you want to make a request for another employee or check, which products have been requested by their peer group, proceeds as follows:
 - a. On the **Request** page, click **Change** next to the **Recipient** field.
 - b. In the **Recipients** dialog, click in the list on the employee you want to request a product for.
 - c. Then, in the **Selected** pane, click on all the employees that you do NOT want to request the product for. There must only be one employee in the list.
 - d. Click **Close**.
4. On the **Request** page, bottom right, click the **Actions | Products other employees requested** menu item.
5. On the **Products other employees requested** page, enable all the products that you want to request as well.
6. Click **Add to cart**.
7. (Optional) On the **My Shopping Cart** page, proceed as follows:
 - a. Click a request.
 - b. In the pane on the right, enter other details about the request.
 - c. Click  **Save**.
 - d. Repeat this step for other requests in the shopping cart if necessary.
8. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.
9. On the **My Shopping Cart** page, click **Submit**.
10. In the **Submit shopping cart** dialog, click **Yes**.

Requesting privileged access

You can use the **Privileged access requests** service category to request privileged access to high-security systems (Privileged Account Management system).

TIP: For more information about Privileged Account Management see the *One Identity Manager Administration Guide for Privileged Account Governance*.

To request privileged access

1. In the menu bar, click **Request | My requests**.
2. In the **My requests** view, click **Start a new request**.
3. In the **Request** window, next to **Recipient** click **Change**.
4. In the **Recipient** view, click the user for whom you want to request the privileged access.
5. Click **Close**.
6. In the **Request** view, click **Privileged access requests**.
7. On the **Request** page, select how you want to access the system by selecting the check box for the relevant option:
 - **Telnet session requests:** Request temporary access using a Telnet session.
 - **Password release request:** Request a temporary password.
 - **Remote desktop session request:** Request temporary access through a remote desktop connection.
 - **SSH session request:** Request temporary access through an SSH session.
8. On the bottom right, click **Move to shopping cart**.
9. In the new dialog, next to **PAM user account**, click **Assign**.
10. In the **PAM user account** dialog, select the PAM user account that you want to use for PAM access.
11. Next to **System to access/Asset**, click **Assign**.
12. Depending on the type of access you have selected, perform one of the following actions:
 - Password release request: In the **System to access** window, in the **table** menu, select which access you want to request, either a **PAM directory** or a **PAM Asset** and then click the PAM directory or PAM asset in the list.
 - Telnet session requests, remote desktop session requests, or SSH session requests: In the **Asset** dialog, click your PAM asset.
13. Click **Assign** next to **Account to access**.
14. In the **Account to access** dialog, select in the **Table** menu, select which access you want to request, either **PAM directory account** or a **PAM Asset account**.
15. In the list, select the system account to which you want to request access.
16. (Optional) In the **Comment** field, enter a comment, for example, to justify why you

are requesting this access.

17. In the **Valid from** field, specify the time from which you want the access to be valid or clear the check box so that access is valid from the time of this request.

TIP: You can use the icons next to the date field to easily select the date and time from the calendar or from a list.

18. In **Checkout duration**, enter the number of minutes for which the access is valid.

NOTE: This duration refers to your entry in the **Valid from** field.

19. Click **Save**.

20. Repeat the steps for all additional users and access types.

As soon as the request is approved, a link is displayed in the detailed view of the request in the request history (**Requests** | **My requests** | **Request history**). You can use this link to log in to the Privileged Account Management to receive the login data.

Request history

The request history provides you with an overview of denied, canceled, or unsubscribed requests. You can also resubmit requests here.

To open the request history

- Open the **Request** | **My Requests** menu and click **Request History**.

Detailed information about this topic

- [Resubmitting a request](#) on page 69
- [Process monitoring](#) on page 70

Resubmitting a request

You can resubmit requests in the request history. This can be processed faster than submitting a new request and retains the request history.

To resubmit a request

1. Open **Request history** and select a request.

This displays more information in the detailed content view.

2. Click **Submit again** in the master detail.

3. Enter a reason for resubmitting in the request and click **OK**.

The request is added to your shopping cart. For more information, see [Edit shopping cart](#) on page 77.

To search in the request history

- Use the extended search.



For more information, see [Searching](#) on page 26.

Process monitoring

In the request history, you can see every request you have submitted for yourself or for others. Use the filter function or advanced search to limit the number of requests displayed. For more information, see [Navigation and use](#) on page 18.







The following compliance states are shown in the request history.

Table 23: Compliance status in the request history

Icon	Description
	Request does not generate rule violations.
	Request generates rule violations.

The request status of the selected request is displayed, amongst other things, in the detailed content view. The following views may be shown.

Table 24: Request status in detailed content view

Status	Description
 Pending/requested	Request is being processed.
 Assigned	The request has been assigned.
 Denied	The request was denied. The reason for denial is a policy or rule violation or the manager did not check the request, whether the request has a limited period.
 Unsubscribed	The request subscription is canceled. For more information, see Unsubscribing requests on page 71.
 Aborted	The request is terminated or the system could not execute the request. This occurs if no one was responsible for checking the request or if the validity period expired. The request history is displayed with the reason for aborting.
 Renewal	The request was renewed. For more information about the selected request is shown in the detailed content view on the Information tab. Information is for example, who submitted the renewal and when.

In the detailed content view, you can view more information about the requests on the **Information**, **Workflow**, and **Compliance** tabs.

To view the current status of your request

1. Open **Request history** and mark the request you want.
2. Select a tab in the detailed content view to view more detailed information.

Editing requests

Requests can be modified until they are unsubscribed. Requests can also be renewed, denied, or canceled.

You can execute these tasks in the menu **Edit Requests** in the Web Portal.

NOTE: You can also cancel requests in the **Request History** menu.

NOTE: You must configure the settings in the Web Designer in order to send cancellations and renewals in the same way as requests in the cart.

To open the "Edit Request" menu

- Select the menu **Request | My Requests** and click **Edit Requests**.

Detailed information about this topic

- [Unsubscribing requests](#) on page 71
- [Canceling requests](#) on page 72
- [Renewing requests](#) on page 72

Unsubscribing requests

You cannot only cancel (or withdraw) requests, you can also unsubscribe them. The difference being that you can only cancel a request within the request process.

Use the **Edit Requests** menu to unsubscribe. These requests must have the status "assigned". Requests with the status "Assigned" are also listed in the request history but cannot be unsubscribed there.

You can unsubscribe products for other employees if you are responsible for them.

To unsubscribe products

1. Open **Edit requests**.
All requests that have been assigned to you are listed in the **Renew or Unsubscribe** view.
2. Select the desired request and click **Unsubscribe**.
NOTE: Request that cannot be selected here, can only be canceled.
3. Enter an optional data and reason for unsubscribing in the **Unsubscribe** dialog and click **Save**.

NOTE: Use the **Show request** action to display additional products associated with this request.

Canceling requests

Requests that are not assigned can be canceled but not unsubscribed. You can also cancel requests in the request history.

To cancel a request

1. Select **Request | My Requests** and click **Edit Requests**.
2. Mark the request you want cancel in **Renew or Unsubscribe**.
3. Click **Withdraw request** in the master detail.
This opens **Withdraw request**.
4. Enter a reason for canceling in the **Withdraw request** dialog and confirm with **OK**.
The request remains in the request history.

Renewing requests

Some requests are only valid for a limited period. You can renew limited requests at any time, provided you have the required permissions to do it.

NOTE: You must configure the settings in the Web Designer in order to send cancellations and renewals in the same way as requests in the cart.

NOTE: You are notified 14 days before your limited period request expires. You can renew the request after receiving this message. The requests are automatically canceled once they have expired.




To renew a request

1. Open **Edit requests**.
Requests that are not in your shopping cart are displayed in **Renew or Unsubscribe**.
All requests are displayed with and without time limits. Sort the requests by validity to list the limited requests sequentially.
2. Renew a request in the name of another employee.
For more information, see [Request for other employees](#) on page 64.
3. Enable the request you want to renew and click **Renew**.
4. Edit the renewal date in the dialog and save the changes.

Maintaining templates

This menu shows all templates you have created yourself and system-wide templates (created and published by others). By default, products in a template are hidden. You can expand the template you want and view the products and edit them. For more information, see [Requesting from templates](#) on page 62.

Table 25: Templates – status

Status	Meaning
	This template has not been approved yet. A decision about publishing it still pending.
	The template is marked for public use but was not published yet.
	The template was published.

To open the "Maintain Templates" menu

- Open the menu **Request | My Requests** and click **Maintain Templates**.

Detailed information about this topic

- [Creating and editing templates](#) on page 73
- [Using a reference user's requests](#) on page 74
- [Deleting templates](#) on page 74
- [Sharing templates](#) on page 75
- [Adding information](#) on page 75

Creating and editing templates

You can add templates for requests that you make frequently. Templates are added to your shopping cart.

To create or edit a request template

1. Add your request to the shopping cart.
For more information, see [Process monitoring](#) on page 70.
2. Open **My Shopping Cart** and select **Create template from shopping cart**.

NOTE: The list of requests and options for handling them is only shown when there are requests in the shopping cart.

In the upper part of **Cart templates** you can see the contents of the shopping cart. Existing request templates are listed in the middle part.

3. Perform one of the following tasks:
 - Select a request template and click **select**.
 - Enter a name for the new template in the **Name of the new template** field.
4. Click **Create template**.

Using a reference user's requests

You can also create templates from reference users' requests. You can add a reference user's request as a new template or insert an existing template.




To use a reference user's request as template

1. Add your request to the shopping cart.
For more information, see [Process monitoring](#) on page 70.
2. Open **My Shopping Cart** and select **By reference user**.
NOTE: More information can be added to the list of employees. Click **View settings | Additional columns** and select the information you require from the dialog.
3. Select an employee from the list.
Requests, memberships, and entitlements are listed. Depending on which requests this employee has triggered or in which hierarchical roles or company resources memberships exist or similar.
4. Enable the item (multi-select is possible) you want to add to the template and click **Create template**.
The selected item is displayed in **Cart Templates**. Your personal templates are also listed.
5. Perform one of the following tasks:
 - Select a template.
The reference user's items are assigned to the template.
 - Enter a name for the new template and click **Create template**.
The selected items are assigned to the new template. The new template is added to your list of personal templates.

Deleting templates

You can remove template you do not need anymore, at any time. Or perhaps you only want to delete individual items? Then you can edit your request templates. You can only delete your own personal templates.


To delete an item or an entire template

1. Open **Maintain templates**.
2. Perform one of the following tasks:
 - Delete your template by clicking .
 - OR -
 - a. Open the request template by clicking .
 - The template is displayed with all the items it contains.
 - b. Highlight the item you want to delete from the template and click .
3. Confirm the prompt with **OK**.

Sharing templates

You can share your templates with other user by publishing them.

To share your template with other users

1. Open **Maintain templates**.
2. Select your template and open the template details with .
3. Enable the options **Template is available to other employees** and **Template has been approved**.



NOTE: Enable this option only if you do not want to make any more changes to the template. After you have completed all changes to the template, enable **Template has been approved**.
4. Click **Save**.

Adding information

You can add additional information to your personal request templates.

To add more information to a request

1. Open **Maintain templates**.
Cart Templates is displayed.

TIP: Click  next to the template to expand the contents and view each item.
2. Use  to open the template details.
This opens **Edit template**.
3. Enter the desired information in the fields and enable the options.
4. Click **Save**.

Shopping cart

Your requests are stored in your shopping cart until you are ready to submit them. Each separate request in your shopping cart is added to a total request and given a shopping cart ID number. If your requests should be submitted later, you can save them in a list.




NOTE: Rule checking is only available if the Compliance Rules Module is installed. For more detailed information about rule checking, see the One Identity Manager IT Shop Administration Guide.

Check only checks whether the requester has the permissions required for the request. The request is also checked for compliance violations. After validation, a prompt appears to confirm whether you want to submit the request.

NOTE: In certain circumstances, you may cause a compliance violation when you grant approval to a request, which allocates a specific entitlement to a business role. For example, an employee may obtain an unauthorized entitlement through this business role. In these cases, the compliance violation is displayed in the detailed content view of the shopping cart.

One of the following icons is displayed in **Status**.

Table 26: Checking status

Icon	Status
	Request can be made.
	Request violates a rule but can still be made. This icon can also indicate that a mandatory product is missing.
	Request cannot be made due to missing request permissions. Or the product has already been assigned.
Advice	If the request verification is still pending, a advice notice is shown in the main context view.

To open the "Shopping Cart" menu


- Open the **Request | My Requests** menu and click **Shopping Cart**.

Detailed information about this topic

- [Viewing requests](#) on page 77
- [Editing requests](#) on page 71
- [Requesting a Starling 2FA token](#) on page 79
- [Requesting products that require multi-factor authentication](#) on page 80
- [Special requests](#) on page 81
- [Requesting groups](#) on page 82



- [Submitting requests](#) on page 82
- [Editing validity periods](#) on page 93
- [Specifying priorities](#) on page 84
- [Failed requests](#) on page 84

Viewing requests

You can view your requests with all their detailed in the shopping cart. If there is a request in your shopping cart, the  icon is displayed in the header of **My Requests**.

TIP: If the shopping cart is empty, you can switch to **Request**, the request history, or your saved for later list from here.

To view your shopping cart

1. Perform one of the following tasks:
 - Open **Shopping Cart**.
 - Click  in the header.
2. Perform one of the following tasks:
 - This displays all the individual items in your shopping cart.
 - Open the grouped entry by clicking .




This expands grouped entries and displays more detail.
3. Use the options in **My Shopping Cart** to choose how to display the contents of your cart.

Edit shopping cart

The **Shopping Cart** menu contains several buttons and options that you can use to edit your requests. The buttons and actions are explained in the following table.

Table 27: Edit options in "Shopping Cart"

Icon/Button	Action
Input fields	<p>These fields are an aid for adding additional information and editing request properties. This additional data could be, for example, that a request violates a compliance rule under specific conditions. These fields are available amongst others in a dialog after triggering a request. Input fields are provided in the following places:</p> <ul style="list-style-type: none"> • In the shopping cart • Saved for later

Icon/Button	Action
	<ul style="list-style-type: none"> • In the request template
	<p>Deletes the request</p> <ul style="list-style-type: none"> • from the shopping cart • From the saved for later list • From the request template
	Saves additional information in the request's detailed content view.
Request for multiple employees	Duplicates requests from the shopping cart for other employees. You will find this action in the main content view in the Actions menu. For more information, see Request for other employees on page 64.
Save for Later	Moves requests from the shopping cart to the saved list. You will find this action in the main content view in the Actions menu.
	<p>Shows the information in the detailed content view about the request currently marked in the shopping cart.</p> <p>In some cases, this icon is available as an action on the product if a request with dependent products cannot be sent.</p>
Check only	<p>Verifies the requests in the shopping cart.</p> <p>You will find this function in the context menu in the My Shopping Cart view. After checking, you are informed whether the request can be carried out.</p>
Template from shopping cart	Creates a template from the shopping cart for reuse. For another employee, for example.
Delete invalid requests	<p>Removes requests from the shopping cart that either violate a rule or require other entitlements.</p> <p>You will find this function in the context menu in the My Shopping Cart view.</p>
Delete shopping cart	<p>Deletes the entire shopping cart contents with one click.</p> <p>You will find this function in the context menu in the My Shopping Cart view.</p>
Edit shopping cart	To edit the shopping cart. For example, to write a reason for the request.
Check & submit shopping cart	Checks and sends the shopping cart for processing. You can find this button at the bottom of the My Shopping Cart view.

Requesting a Starling 2FA token

The Starling Two-Factor Authentication is a multi-factor authentication and can be used when requesting products or when approving attestations in the Web Portal. For more detailed information about setting up multi-factor authentication, see the *One Identity Manager Authorization and Authentication Guide* and the *One Identity Manager Web Application Configuration Guide*.

To use multi-factor authentication, you must have a Starling 2FA token. You can request this product in the Web Portal. The following data is required to request a Starling 2FA token.

Table 28: Data for requesting a Starling 2FA token


Data	Description
Mobile telephone number	Your mobile phone number is mandatory for multi-factor authentication. You can add this in the Contact view under My Settings , if it is not already there. For more information, see Changing contact information on page 52.
Country	Entering the country where you live is mandatory. You can add this in the same way as your mobile phone number, under My Settings .
Default email address	You can also add this in the same way, under My Settings .

To request a Starling 2FA token

NOTE: Each employee can request only one new Starling 2FA token. If your mobile number changes, you must cancel the product and request it again.

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. Click **Access Lifecycle** on the **Request** page.
4. Click **Add to the cart** next to the product **New Starling 2FA token**.
5. Check the mobile telephone number and country code in the dialog.

NOTE: If you have not yet saved a mobile telephone number to your profile, enter your number in the dialog.

6. Click **OK**.
7. (Optional) Perform the following steps on the **My shopping cart** page.
 - a. Click a request.
 - b. Enter further details on the request in the area to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.

8. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.

9. On the **My Shopping Cart** page, click **Submit**.
10. In the **Submit shopping cart** dialog, click **Yes**.

The request is forwarded to your manager for approval. Once your manager has granted approval, you will receive a text message on your mobile phone with a link to a multi-factor authentication app.

11. Install the app on your smartphone:
 - a. Open the text message and click the link.
 - b. Download the multi-factor authentication app to your smartphone.
 - c. Open the app and enter your country code and the mobile phone number.
 - d. Confirm the given data and enter your email address.
 - e. Reconfirm and select whether to use telephone or text message contact.

After successful installation, you will receive a registration code.

You can use the app for generating a security code.

Related topics


- [Requesting products that require multi-factor authentication](#) on page 80
- [Confirming terms of use](#) on page 94
- [Approving pending requests](#) on page 87
- [Approving my attestations](#) on page 103

Requesting products that require multi-factor authentication

Multi-factor authentication can be used for specific security-critical requests. Depending on the configuration, either the requester, the order recipient, or the approver must authenticate themselves using an additional security code. Define which products require this authentication in your service items.

For more detailed information about preparing the IT Shop for multi-factor authentication, see the *One Identity Manager IT Shop Administration Guide*. To use multi-factor authentication, you must have a Starling 2FA token. For more information, see [Requesting a Starling 2FA token](#) on page 79.

To request a product that requires multi-factor authentication

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. On the **Request** page, click a service category containing products that require multi-factor authentication.
4. Click **Add to cart** next to the product requiring multi-factor authentication.
5. (Optional) Perform the following steps on the **My shopping cart** page.
 - a. Click a request.
 - b. Enter further details on the request in the area to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.
6. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.
7. On the **My Shopping Cart** page, click **Submit**.
8. In the **Submit shopping cart** dialog, click **Yes**.
9. In the **Terms of use** view, enable **I have read and understood the terms of use** and click **Accept**.
10. If the product requires multi-factor authentication, you are prompted to enter a security code. It may take a few minutes for the prompt to be displayed.
 - Click **Authenticate with Starling 2FA app**.
 - OR -
 - Click **Send SMS** or **Phone call** and enter the security code that is generated. Click **Next**.

Special requests

Certain actions trigger a request when executed in the Web Portal and add it to the cart. The following actions cannot be executed from the **Request** menu.

- [Adding entitlements](#) on page 168
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Master data](#) on page 166

Requesting groups

NOTE: This function is only available if the module Active Directory Module or Target System Base Module is installed.


The service category "Active Directory Groups", represents another special role in the request process using a service category. During the request process, the group requester must enter the data for the group.

To make a request for Active Directory groups

1. In the toolbar, click **Request | My Requests**.
2. On the **My requests** page, click **Start a new request**.
3. Click the service category **Active Directory groups** on the **Request** page.
4. Enable the checkbox next to the required products and click **Add to cart** below the list.
5. In the **New Active Directory security group** dialog, enter a group name in the **Group name** field.
6. Click **OK**.

TIP: Enter a group name that details the naming, type of group and target container. The approver adds the group based on this information. You get more information about the product when you click the product name.

The information about the group should contain hints about the naming, type of group and target container. The approver adds the group based on this information. You get more information about the product when you click the product name.

7. Perform the following steps on the **My Shopping Cart** page:
 - a. Click a request.
 - b. Enter further details on the request in the area to the right.
 - c. Click .
 - d. Repeat these steps where necessary for other orders.
8. (Optional) On the **My Shopping Cart** page, click **Edit**.

A dialog for the shopping cart opens. You can enter a comment and other information about your shopping cart. This data applies to all items in the shopping cart. For more information, see [Edit shopping cart](#) on page 77.
9. On the **My Shopping Cart** page, click **Submit**.
10. In the **Submit shopping cart** dialog, click **Yes**.

Submitting requests

After you have added your requests to the shopping cart, edited, and checked them, you can submit your shopping cart.

To submit your requests

1. Open **My Shopping Cart**.
 2. Ensure you only have requests that you really want to submit in your cart.
NOTE: If the shopping cart consists of requests that you want to execute on a regular basis, you can create a template from the shopping cart. For more information, see [Maintaining templates](#) on page 73.
 3. Highlight the request you want and enter more data in the master detail.
NOTE: The request must have been checked and status set to **OK**.
 4. If you want to enter an additional comment about the shopping cart, click **Edit**.
 5. Enter a comment about the shopping cart and click **Save**.
NOTE: you can test the request for a rule violation by selecting **Check only** in the Actions menu. If a rule violation is found, the request is still being processed and requires further approval from managers.
 6. Click **Submit**.
 7. Confirm with **Yes**.
NOTE: You may be required to confirm the terms of use for some shopping cart items. The terms of use are displayed after you have confirmed the prompt with **Yes**. Read the terms of use and set the option **I have read and understood the terms of use**. You will also be prompted to enter your user name and password. Close the terms of use view and click **Accept**. For more detailed information about default reasons, see the One Identity Manager IT Shop Administration Guide.
- The information **The request was successfully submitted** appears in **My Shopping Cart**.

Setting validity periods

You can specify a validity period for a request or extend its validity period.

To specify the validity period for a product request

1. Open **My Shopping Cart**.
2. If you want to edit several requests at the same time, click **Edit**.
This opens a dialog for the shopping cart.
3. Enter values to fix the validity period of the requests in **Valid from** and **Valid until**.
NOTE: If there is already a date in **Valid from**, the validity period is determined as from this date and not from the approval date. The same applies to the **Valid until** date. An additional note is displayed in the detailed content view. If the request approval validity period has expired, an error message is displayed and the request is aborted.
NOTE: Products that already have a fixed validity period are not changed in the

process. To change the validity period of products that already have a fixed validity period, check the **Replace already specified dates** box.

4. Save the changes.

Specifying priorities

You can specify the priority of a request in a similar way to the validity period. There are four priority levels.

To specify the priority of requests

NOTE: The **Priority** menu is enabled by default and can be applied. You can disable the **Priority** menu using a configuration parameter in the Web Designer. For detailed information about enabling configuration parameters, see the One Identity Manager Web Designer Object Model Documentation.

1. Run the first two steps as described in the **To specify the request validity period** step-by-step.
2. In the shopping cart dialog, check the **Apply the following priority to all products in the shopping cart** box and select an entry in the list.
3. Save the changes.


Failed requests


If your request could not be sent when you executed **Submit**, you can examine the reason for the failure in your shopping cart. The reasons are marked with the icon you know already, in the **Status** column. For more information, see [Shopping cart](#) on page 76.

To view the reason for a failed request

1. Open **Service catalog | Shopping cart** and click **Submit**.
2. Confirm **Request cannot be submitted** with **OK**.

Icons are displayed for the products in your shopping cart in **Status**, which already indicate which product in your request is causing the problem.

3. Highlight the product with the  icon in your shopping cart and the note **Missing required product**.

Required products are listed in the detailed content view. Required products are dependent products. The action to run or information about how to proceed with each item is displayed respectively. For example, if a required product has already been requested and it can only be requested once, it is not possible to request it again. If the missing required product is still in the request, the action  is provided.

4. Click  in the master detail to see information about the product's whereabouts.

This information is displayed in a dialog. You can see exactly where your request currently is and who the approver is on the **Workflow** tab.

My actions

My Actions is a submenu of **Request**. You can execute various actions, such as approve pending requests or handle request inquiries, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Detailed information about this topic

- [Pending requests](#) on page 85
- [Approval history](#) on page 95
- [Request inquiries](#) on page 96

Pending requests

Many requests go through a manual approval process, in order to ensure the correct assignment of products. You may be required to approve or deny requests, for example if you are a manager. You can make inquiries in cases where you need more information to make a decision, add more approvers, or reroute the request.

You can see more detailed information about a pending request in the detailed content view.

Table 29: Detailed content view of a pending request

Tabs	Description
Information	<p>Displays all information about a request. The information displayed varies and is dependent on the service category from which the request was triggered. The following data can be displayed.</p> <ul style="list-style-type: none">• Product• Recipient• Requester• Processing status• Priority• Request date• Valid from• Valid until

Tabs	Description
	<ul style="list-style-type: none"> Renewed until Reason <p>You do not have to fill all the properties. None of the information can be edited or clicked on apart from the product, Clicking the product opens a Hyper View overview.</p>
Workflow	Displays the life cycle chronologically as from the time of request.
Compliance	Displays any rule violations for this request.

NOTE: Pending requests that have not been granted approval (whether from an approver or automatically is irrelevant) are displayed with a reason in the **Pending requests** view. Reasons are only displayed if approval has been denied, to provide the next approver with an overview as an aid to reaching the next decision. If you want to see the entire approval workflow for this request, select the **Workflow** tab in the detailed content view of the selected request.

To open the "Pending Requests" menu

- Open the menu **Request | My Actions** and click **Pending Requests**.

Detailed information about this topic

- [Approving pending requests](#) on page 87
- [Canceling pending requests](#) on page 88
- [Displaying and approving complete requests](#) on page 88
- [Approving pending Active Directory group requests](#) on page 88
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- [Adding additional items](#) on page 94
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Approving pending requests

If you are a designated approver for a particular product, when an employee makes a request, it appears on both your start page and in **My Actions | Pending Requests**. You can grant, deny, or cancel the request. If you approve a request, the product is available to the employee. You can sort, filter, and search on the view. For more information, see [Navigation and use](#) on page 18.

NOTE: You can select a predefined text for all undecided approvals in the **Standard reason** field or using the **Assign** link. Standard reasons are displayed in the approval history and in the case details. For more detailed information about default reasons, see the One Identity Manager IT Shop Administration Guide.

Once you have made an approval decision, the request disappears from your list of pending requests.

To make approval decision about a pending request

1. Open **Pending requests** and mark the request you want in the list of pending requests.
2. Perform one of the following tasks:
 - Approve the request with ☒ and click **Next**.
 - Deny the request with ☐ and click **Next**.

NOTE: In **Approvals**, you can enter a reason for your approval decision for all open requests or select a standard reason. You can also add the desired information explicitly to the selected request using the **Enter reason** link or under the displayed date in **Valid thru**.

3. Perform one of the following tasks.
 - a. In the **Approvals** view, select a reason for your decision and click **Save**.
 - b. In the **Approvals** view, select a reason for your decision and click **Save**.

The approval decision reason supports the audit trail.

4. If the product requires multi-factor authentication, you are prompted to enter a security code. It may take a few minutes for the prompt to be displayed.
 - Click **Authenticate with Starling 2FA app**.
 - OR -
 - Click **Send SMS** or **Phone call** and enter the security code that is generated. Click **Next**.

Detailed information about this topic

- [Approval history](#) on page 95
- [Pending requests](#) on page 85

Canceling pending requests

As approver, you are entitled to withdraw a request on behalf of those responsible.

To cancel a request

1. Open **Pending requests** and mark the request you want in the list of pending requests.
2. Click **Withdraw request** in the master detail.
3. Enter a reason for the withdrawal in the dialog and click **OK**.

Displaying and approving complete requests

While handling pending requests, you can display all the requests and grant or deny approval for them all.

To view a complete request and approve all pending requests

1. Open **Pending requests** and mark the request you require in the list of pending requests.
2. Select **Show entire request** under **more**.
3. Perform one of the following tasks:
 - a. Grant or deny approval for pending requests by clicking **Approve all** in **Pending Requests**.
 - b. Highlight the request you want in **Pending requests** and click **Add items to this request**.

Detailed information about this topic

- [Approval history](#) on page 95
- [Pending requests](#) on page 85

Approving pending Active Directory group requests

You can enter additional actions for pending requests of an Active Directory group.

To make an approval decision about a new Active Directory group

1. Open **Pending requests** and mark the request from an Active Directory group.
2. Open the dialog window using **Configure the new group** and enter the additional

data for the new group.

Table 30: Configure the new group

Setting	Description
Name	Unique name of the new Active Directory group.
Container	Selected container.
Group type	Selected group type.

3. Save the changes.
 4. Perform one of the following tasks:
 - Approve the request with ☒ and click **Next**.
 - Deny the request with ☐ and click **Next**.
 5. Perform one of the following tasks:
 - a. In the **Approvals** view, select a reason for your decision and click **Save**.
 - b. In the **Approvals** view, select a reason for your decision and click **Save**.
The approval decision reason supports the audit trail.
 - c. Enter the request's expiry date if necessary and click **Save**.
- NOTE:** The setting with the expiry date is only available when approving the request.

Detailed information about this topic

- [Approval history](#) on page 95
- [Pending requests](#) on page 85

Approving assignment of new managers

If a manager wishes to assign a new manager for their employee, they must first select a new manager in the employee's master data and select a deadline for the change-over. This triggers a **New manager assignment** request. For more information, see [Assigning new managers](#) on page 147.

If you are selected as the new manager, you receive an approval request from the old manager. After you have accepted the change of manager, you automatically become the new manager on the given date.

You can already cancel entitlements assigned to the employee on the given date.

To make an approval decision about a new manager

1. Open **Pending requests** and highlight the product **New manager assignment** in the list of pending requests.

NOTE: If the employee you will be manage on the given date after approval is granted has already received requests or entitlements, you can cancel these on first day.
2. Open the list of assigned entitlements using the link **View user's entitlements** and mark the required entitlement.
3. Perform one of the following tasks:
 - Enable the checkbox **Delete on the effective date** and click **Save**.
 - Enable the checkbox **Cancel on the effective date** and click **Save**.
4. Perform one of the following tasks:
 - Approve the request with ☒ and click **Next**.
 - Deny the request with ☐ and click **Next**.

The marked request is displayed in **Approvals**.

5. Perform one of the following tasks:
 - In the **Approvals** view, select a reason for your decision and click **Save**.
 - In the **Approvals** view, select a reason for your decision and click **Save**.
The approval decision reason supports the audit trail.
 - Enter the request's expiry date if necessary and click **Save**.

NOTE: The setting with the expiry date is only available when approving the request.

Detailed information about this topic

- [Approval history](#) on page 95
- [Pending requests](#) on page 85

Making inquiries

Before you make an approval decision about a pending request, you can send a question to a user about it.

To make an inquiry

1. Open **Pending requests** and mark the request you require in the list of pending requests.
2. In the detailed content view, select the **Submit inquiry** action from the **more** context menu.
3. Perform one of the following tasks:

- Select an employee from the list in the **Submit an inquiry about this request** dialog.
 - Use the extended search.
 - Use a filter and then mark the item you want in the result list.
4. Enter your query about the request in **Submit an inquiry about this request** and click **Save**.

A message, saying that the inquiry was sent, is displayed in **Pending Requests**.

Deleting questions

If your problem has become irrelevant, you can recall your question.

To delete an inquiry

1. Select the request that you made the inquiry about and click **Recall last question**.
2. Enter a reason for recalling the inquiry in **Recall last question** and click **OK**.

Revoking hold-status

Questions asked about a pending request that have been answered, are given hold status in the approval workflow.

To revoke hold status

1. Highlight the request you want to take off hold.
2. Click **Revoke hold status** in the master detail.

The request is taken off hold. This releases the request for approval and can also be edited by other approvers.

Rerouting approvals

This action is only available for requested products for which a special approval procedure is required. Employees authorized to make approvals can see this action and reroute an approval. For detailed information about approval procedures for IT Shop requests, see the One Identity Manager IT Shop Administration Guide.

To reroute an approval

1. Open **Pending requests** and mark the request you require in the list of pending requests.
2. Select **Reroute approval** from the **more** menu in the master detail.
3. Select one of the single approval steps in **Reroute approval** and click **Reroute**

approval

4. Enter a reason for rerouting in the field and click **Reroute approval**.

Delegating approvals

Delegating an approval means you pass the decision making onto someone else. You, as authorized person, can recall this action in the approval history.

To delegate an approval

1. Open **Pending requests** and mark the request you require in the list of pending requests.
2. Select **Delegate approval** from the **more** menu in the master detail.
This displays **Select an employee who should approve instead**.

3. Perform one of the following tasks:
 - a. Select an employee from the list in **Select an employee who should approve instead**.
 - b. Use the extended search.
 - c. Use a filter and then mark the item you want in the result list.

For more information, see [Navigation and use](#) on page 18.

4. Enter a reason for the delegation in the dialog and click **Save**.

A message, saying that the delegation was sent, is displayed in **Pending Requests**.

Adding approvers

By adding another approver, you share the approval of this request procedure with the other approver. You, as authorized person, can recall this action in the approval history.

To add more approvers to the request

1. Open **Pending requests** and mark the request you require in the list of pending requests.
2. Select **Add approver** from the **more** menu in the main detail.
3. Perform one of the following tasks:
 - a. Select an employee from the list in **Select additional approvers**,
 - b. Use the extended search.
 - c. Use a filter and then mark the item you want in the result list.
 - d. Click the filter icon in **Display** or another column to limit the search for the employee for your inquiry.

For more information, see [Navigation and use](#) on page 18.

4. Enter a reason for adding adding another approver in the dialog and click **Save**.

A message, saying that the additional approver was entered, is displayed in **Pending Requests**.

Changing priority

You can view pending requests in the **Pending requests** view. The list can be sorted in ascending or descending order. For more information, see [Sorting](#) on page 32.

NOTE: The **Priority** menu is enabled by default and can be applied. You can disable the **Priority** menu using a configuration parameter in the Web Designer. For detailed information about enabling configuration parameters, see the One Identity Manager Web Designer Object Model Documentation.

As an approver of pending requests, you can edit the priority of certain request to influence their position in the sort order. This means, request with high priority are listed at the top if the list is sorted in descending order.

To change a request's priority

1. In the header, click **Request | My Actions**.
2. On the **My Actions** page, click **Pending requests**.
3. On the **Pending Requests** page, select your request in the list of pending requests.
4. In the detailed content view, click **More | Change priority**.
5. In the **Set the priority for this request** dialog, click the priority you want in the **Priority** menu.
6. Click **Apply**.
7. Then make a approval decision about the request (see [Approving pending requests](#) on page 87).

NOTE: The modified priority is not changed until you have saved you approval decision about the request.

Editing validity periods

As approver, you have the option to extend the validity period of a pending request for an limited period. This is necessary if no approval decision was made within the validity period. Extending the validity period prevents the request from expiring and having to make a new request.

NOTE: You cannot edit the validity period of requests, which consist of multi-request (not unsubscribable) products.

To configure the validity period for request from multi-request products, you must set the corresponding configuration parameter in the Web Designer. For more detailed information about setting configuration parameter, see the One Identity Manager Web Designer Object Model Documentation.

To edit a request's validity period

1. Open **My Actions | Pending requests** and mark the request you require in the list of pending requests.
2. Select **Change validity period** from the **more** menu in the master detail.
3. Edit **Valid until** in **Set the validity period for this request** and click **Apply**.

Adding additional items

You can add additional items to pending request by going to the **Request** menu from here.

To add additional products to a request

1. Open **Pending requests** and mark the request.
2. Select **Show entire request** under **more**.
3. Click **Add items to this request** in **Request overview**.
4. Add the products you want to your shopping cart in **Request** and click **Submit**.

Confirming terms of use

If another employee requested a product for you, which requires the terms of use to be confirmed and possibly additional authorization, your approval decision for this request is required. If the requester has confirmed the terms of user for your request, you can view the request under **Pending Requests**. Terms of use can only be confirmed if a special approval workflow is explicitly set up for the requested product.

To confirm terms of use for your own requests as the recipient

1. Open **Pending Requests** and mark the request for which the confirmation of terms of use by the requester is required.

In the detailed content view, you can see, amongst other things, information about approval decisions for requests and terms of use on the **Workflow** tab.

2. Perform one of the following tasks:
 - Approve the request with ☒ and click **Next**.
 - Deny the request with ☐ and click **Next**.

Approvals displays your approvals.

3. Perform one of the following tasks:
 - In the **Approvals** view, select a reason for your decision and click **Save**.
 - In the **Approvals** view, select a reason for your decision and click **Save**.

The approval decision reason supports the audit trail.

- Enter the request's expiry date if necessary and click **Save**.
4. If the product requires multi-factor authentication, you are prompted to enter a security code. It may take a few minutes for the prompt to be displayed.
- Click **Authenticate with Starling 2FA app**.
 - OR -
 - Click **Send SMS** or **Phone call** and enter the security code that is generated. Click **Next**.

Approval history

In the approval history, you can view all products you have assigned, denied, or canceled, or that are still being processed (status "Request"). The **Approval History** menu item is the same as **Request History** menu item in its structure and content. For more information, see [Process monitoring](#) on page 70.

To open the "Approval History" menu

- Open the **Request | My Actions** menu and click **Approval History**.

Detailed information about this topic

- [Searching for approvals](#) on page 95
- [Withdrawing delegation](#) on page 95
- [Withdrawing additional approval](#) on page 96

Searching for approvals

In the approval history, you can search, using the advanced search, for products that were assigned to you for approval.

To use the advanced search function in the approval history

1. Open **Approval history**.
2. Use the extended search.

For more information, see [Searching](#) on page 26.

Withdrawing delegation

You can only withdraw delegations if the product has the status "Request".

To cancel a delegation

1. Open **Approval history**.

This shows all the products you have assigned, denied, canceled, or edited.

2. Highlight the required request and click **Withdraw request** in the master view.
3. Click **Withdraw delegation** in the dialog.

NOTE: **Withdraw delegation** is only shown if approval of this product was transferred to someone else.

4. Enter a reason for the withdrawal in the next dialog and click **Save**.

For more information, see [Approving pending requests](#) on page 87.

Withdrawing additional approval

You can only withdraw additional approvals if the product has the status "Request". Once the approval has been canceled, you are the only approver for this procedure again and can add additional approvers.

To cancel additional approval

1. Open **Approval history**.

This shows all the products you have assigned, denied, canceled, or edited.

2. Highlight the request you want to withdraw and click **Withdraw additional approval** in the master detail.

NOTE: **Withdraw additional approver** is shown if an additional approver was added to this product.

3. Enter a reason for the withdrawal in the field in the dialog and click **Save**.

For more information, see [Approving pending requests](#) on page 87.

Request inquiries

NOTE: This function is only available if the Identity Management Base Module or Attestation Module is installed.

You can query requests or attestation cases. Request Inquiries are displayed in under **Request Inquires**. You can see more information about the inquiry in the detailed content view. The age is empty if there are not inquiries.

For more information, see [Pending requests](#) on page 85.

To answer an approval inquiry

1. Open **Request | My tasks** and click **Request inquiries**.
2. Mark an inquiry in **Request Inquiries**.
3. Click **Respond** to enter an answer.

The answer is sent on saving. Confirmation verification is displayed.

Auditing

Auditing is a submenu of the **Request**. You can execute various actions, such as viewing all requests or viewing all approved requests, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Detailed information about this topic

- [Request](#) on page 97
- [Approvals](#) on page 98

Request

This overview lists all requests that have been created with the selected time period. You can select an employee to view just their requests. To limit the number of list entries you can use the advanced search, the filter function or you can select more columns to display. For more information, see [Requests](#) on page 59. Marked requests provide the following information in the detailed content view.


- Details of the requested item
- Status indicates the latest action performed on the request
- General information about the request, including all steps the request has completed, and the next steps
- Details of the recipient and requester
- If there are any rule violations for the request these are displayed with **At least one rule was violated**.

To view historical requests

1. Open **Auditing | Request** and select an employee using **Assign**.
2. Perform one of the following tasks:
 - Use a filter and then mark the item you want in the result list.
 - Use the extended search.

- Mark the entry you want in the list.

This displays details of the selected item in the detailed content view.

NOTE: The **Workflow** tab in the detailed content view shows all changes chronologically in the form of a workflow diagram. Use  to open a dialog and view the requester and request number.

Approvals

You can use the **Auditing - Approvals** view to see requests involving a particular employee. This view is the same as on **Auditing - Requests**. Use the search function to search for a particular request or to filter the results.

To display all historical requests for a specific approver

1. Open **Auditing | Approvals** and select an approver using **Assign**.
2. Perform one of the following tasks:
 - Use the extended search.
 - Mark the entry you want in the list.

This displays details of the selected item in the detailed content view.

NOTE: The **Workflow** tab in the detailed content view shows all changes chronologically in the form of a workflow diagram.

IT Shop escalation

NOTE: You only see the menu **IT Shop escalation approval** if you are a fallback approver or member of the chief approval team.

If there are requests pending and the approver responsible is not available for an extended period or has no access to Web Portal, then the fallback approver or member of the chief approval team must make an approval decision. For more detailed information about the chief approval team, see the One Identity Manager IT Shop Administration Guide.

Detailed information about this topic

- [Escalated request approvals](#) on page 98
- [Canceling escalated requests](#) on page 99

Escalated request approvals

As a fallback approver you can make approval decisions about escalated pending requests.

To make approval decisions about escalated pending requests

1. Open **IT Shop Escalation**.
2. Use a filter and then mark the item you want in the result list.
3. Perform one of the following tasks:
 - a. Approve the request with ☒ and click **Next**.
 - b. Deny the request with ☐ and click **Next**.
 - c. Click **Approve all** and **Next**.
 - d. Click **Deny all** and **Next**.

IMPORTANT: The four-eye principle can be broken for decisions because chief approval team members can make decisions for requests at any time!

4. Perform one of the following tasks:
 - a. In the **Approvals** view, select a reason for your decision and click **Save**.
 - b. In the **Approvals** view, select a reason for your decision and click **Save**.
The approval decision reason supports the audit trail.
 - c. Enter the request's expiry date if necessary and click **Save**.

NOTE: The setting for the expiry date is only available when approving the request.

Canceling escalated requests

You can cancel escalated requests in **IT Shop Escalation**.

To cancel escalated pending requests

1. Open **IT Shop Escalation**.
2. Use a filter and then mark the item you want in the result list.
3. Click **Withdraw request** in the master view and enter a reason for the withdrawal in the dialog.





Attestation


Attestations require a manager to verify data to ensure that it is compliant. For example, a manager may need to attest to the Active Directory groups to which each of his employees belong.

In **Attestation**, you can, as a Compliance and Security Officer or attestation manager, for example, edit existing or create new policies.

The following tables provide you with an overview of the menu items and actions that can be executed here.

Table 31: Menu items for the "Attestation" menu

Menu	Menu item	Action	Description
Attestation	My Attestation Status		View your pending attestation cases and send reminder mails to attestors.
	My actions	 Pending Attestations	View all pending attestations you are permitted to approve and make an approval decision.
		 Attestation history	View attestations granted or denied approval.
		 Attestation inquiries	View submitted attestation inquiries within the scope of an approval workflow
	Attestation policies	 Attestation runs	View current and predicted values for pending attestation policy runs. Edit expiry date or send reminder emails to attestors.

Menu	Menu item	Action	Description
		 Attestation policy settings	View and edit existing Attestation Policies
	Auditing		View all Attestation Cases in a selected time period.

Detailed information about this topic

- [My attestation status](#) on page 101
- [My actions](#) on page 104
- [Governance administration](#) on page 110
- [Auditing](#) on page 122
- [Escalation](#) on page 123

My attestation status

| NOTE: This function is only available if the module Attestation Module is installed.

The **My Attestation Status** menu shows:

- Attestation cases to be approved by you
- Pending attestation cases
- Attestation cases that you are involved in

If you are an auditor or manager, you also see attestation cases performed by other employees. As a member of the chief approval team, you make approval decisions about attestation cases and assigned attestation cases to other attestors.

In **My Attestation Status**, you can switch between different views.

- Group memberships
- Objects attestation
- All attestation cases

For each case you can see the current status and the creation date in the detailed content view. You can run the following action or get information.

- See whether the case was approved or denied.
- Obtain detailed information about the selected attestation case from the **Information**, **Workflow**, **Attestation policy** and **History** tabs.
- As attestor, you can view attestors for pending attestation cases.

- Send a reminder.
- As a chief approver make attestation case approval decisions.

Detailed information about this topic

- [Viewing details](#) on page 102
- [Attesting pending attestations](#) on page 102
- [Sending reminders](#) on page 103
- [Approving my attestations](#) on page 103

Viewing details

You can display details of objects stored with an Attestation History case.

NOTE: Objects details are also available in **Pending Attestations**, **Attestation History** and **Auditing**.

To view the object details

1. Mark the attestation case you want to view in **My Attestation Status**.
2. Click **Show details** on **Information**.
3. Select an object in **Attested object** and click **View current state of the object**.

This displays an overview with shapes about the attestation. You can see the risk index and run risk index functions in **Risk**. For more information about risk indexes, see One Identity Manager Risk Assessment Administration Guide.

Attesting pending attestations

With **My Attestation Status**, you can display attestators who still have pending attestation. You can send these attestors reminder emails.

NOTE: You can also view attestators with pending attestations over **Attestation History** and **Auditing**.

To notify an attestor about pending attestation cases

1. Open **My Attestation Status** and click **View attestors for pending attestation cases**.
2. In the **Send a reminder mail** dialog, click **Send a mail** next to the employee you want to notify.

The email program linked to the Web Designer is displayed and an email template with the attestor's email address is opened.

3. Complete and send the email to the attestor.

The email program is closed.

Sending reminders

You can send a reminder to attestors who are assigned to pending attestation cases.

NOTE: You can also send reminders to attestors over the menus **Pending Attestations** and **Auditing**.

To send a reminder to the attestors

NOTE: Reminders can only be sent to attestors for attestation cases with the status **Pending**.

1. Select an attestation case.
2. Click **Send reminder** and write a message to the attestors in the **Send a reminder email** dialog.
3. Click **OK**.

Approving my attestations

You can make approval decisions about your pending attestations in **My Attestation Status**.

NOTE: You can also make approval decisions in **Pending Attestations**.

To approve pending attestations

1. Open **My Attestation Status**.
2. In **My Attestation Status**, switch to one of the following tabs:
 - Group memberships
 - Objects attestation
 - All attestation cases
3. In the pending attestations view, select the required case.
4. Perform one of the following tasks:
 - Grant approval by clicking ☒.
 - Deny approval by clicking ☐.
5. If required, repeat step 3 and click **Next**.
6. Perform one of the following tasks:

- Enter a reason for your decision in the field.
- Select an available reason in the **Standard reason** field.

NOTE: You have the option of selecting a predefined text for all cases still to be approved using the **Standard reason** link. Standard reasons are displayed in the approval history and in the case details. For more detailed information about default reasons, see the *One Identity Manager Attestation Administration Guide*.

7. Click **Save**.

NOTE: If you want to grant or deny approval to the entire list of attestation cases, you can set **Approve all** or **Deny all** before clicking **Save**.

8. If the attestation policy requires multi-factor authentication, you are prompted to enter a security code. It may take a few minutes for the prompt to be displayed.

- Click **Authenticate with Starling 2FA app**.
- OR -
- Click **Send SMS** or **Phone call** and enter the security code that is generated. Click **Next**.

For more detailed information about multi-factor authentication for attestations, see the *One Identity Manager Attestation Administration Guide*.

For more information, see [Requesting a Starling 2FA token](#) on page 79.

My actions

My Actions is a submenu of **Attestation**. You can execute various actions to do with the attestations you manage, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Detailed information about this topic

- [Pending attestations](#) on page 104
- [Attestation history](#) on page 108
- [Attestation inquiries](#) on page 109

Pending attestations

Attestations are a way of verifying that security and compliance measures are being met. For example, having a manager attest to the groups his employees belong to provides accountability if security breaches are found. Attestation policies define what and whom to attest.

Attestation policies are run on a schedule, and generate attestation cases. These appear on **My Actions**. The amount of time you are given to close an attestation case is configured as part of the attestation policy.

As an attestor, you must be able to verify your attestations. Verifying attestations requires reading reports or manually checking objects that are attested. If you are not ready to make a decision, you may be able to:

- Generate a report that provides detailed information about the object which you are attesting
- Request more information, add attestors, or delegate the attestation.

Some functions have already been described in the **My Attestation Status** menu. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "Pending Attestations" menu

- Open **Attestation | My Actions** and click **Pending Attestations**.

Detailed information about this topic

- [Viewing details](#) on page 102
- [Sending reminders](#) on page 103
- [Pending attestations](#) on page 104
- [Approving my attestations](#) on page 103
- [Viewing new attestations](#) on page 105
- [Adding approvers](#) on page 106
- [Attestations for a specific object type](#) on page 106
- [Viewing employees authorized to make approvals](#) on page 107
- [Object attestations history](#) on page 107
- [Making inquiries](#) on page 108

Viewing new attestations

All the attestation policy attestation cases are displayed. It is possible that some of the attestation cases have existed for a while and have been approved several times. New cases have not been granted approval yet but might have been denied approval before. These cases are marked with "Yes" in **New**.

NOTE: You can add the **Not approved before** column to your table view by showing additional columns. This provides the same information as in the **New** column, which is shown in the table by default.

To view new attestation cases

1. Open the **Pending Attestations** menu and select one the following actions:
 - Click an object type.
This displays all the matching attestation policies for this object type.
 - Click **View attestation policies**.
All existing attestation policies are displayed.
2. Highlight the new attestation case and view more details about the case in the master detail.

Adding approvers

In **Pending Attestations**, you can add approvers to attestations.

To add an approver

1. Mark an attestation case in **Pending attestations** and select the action in **Add approver**.
2. Select an approver from the dialog and enter a reason.
3. Save your data.

Attestations for a specific object type

You can view attestation cases for a specific object type in the **Pending attestations** menu.

To view attestation for a specific object type

1. Open **Pending Attestations** and click an object type.
This displays all the matching attestation policies for this object type.
| NOTE: How you proceed, depends on the object type you select.
2. Perform one of the following tasks:
 - a. Proceed as follows, if you selected **Cost center**.
A list of your selected object types appears in the view.
 - Select the required cost center.
This displays the pending attestations for the selected cost center The **Object attestation** and **All attestation cases** views are available.
 - b. Proceeds as follows, if you select **Employees** or **Business Roles**.

A list of your selected object types appears in the view.

- Select the object type required for viewing the attestation, such as "employee".

In the **Pending Attestations** view, the **Memberships** and **All attestation cases** views are available.

3. Select the required view.

This displays a list of attestation for the selected view.

4. Highlight the required attestation to view further details.

In the detailed content view you see several tabs containing detailed information about attestation.

Viewing employees authorized to make approvals

In **Pending Attestations**, you can view the employees authorized to make approvals for an attestation case.

| **NOTE:** This function is also available in **Auditing**.

To view employees with approval authorization for an attestation case

1. Open the **Pending Attestations** menu and select one the following actions:

- Click an object type.

This displays all the matching attestation policies for this object type.

- Click **View attestation policies**.

All existing attestation policies are displayed.

2. Mark the desired case.

This displays details of the selected case in the detailed content view.

3. Select the **Workflow** tab.

This displays the current authorized approvers and approval authorized employees who have already made approvals.

Object attestations history

In the **Pending Attestations** menu you can view previous attestations of an object.

| **NOTE:** This function is also available in **Auditing**.

To view previous attestation cases for an object

1. Open the **Pending Attestations** menu and select one the following actions:
 - Click an object type.
This displays all the matching attestation policies for this object type.
 - Click **View attestation policies**.
All existing attestation policies are displayed.
2. Mark the desired case.
This displays details of the selected case in the detailed content view.
3. Select the **History** tab.
This displays a list of the attestation cases that have already taken place for the selected object. You can get more information about each attestation case.

Making inquiries

Before you make an approval decision about a pending attestation, you can send a question to a user about it.

To make an inquiry

1. Open the **Pending Attestations** menu and mark the attestation case in question.
2. In the detailed content view, select the **Submit inquiry** action.
3. Perform one of the following tasks:
 - In the **Submit an inquiry about this attestation case** dialog, select an employee from the list.
 - Use the extended search.
 - Use a filter and then mark the item you want in the result list.
4. In the **Submit an inquiry about this attestation case** dialog, enter your question about the attestation case and click **Save**.
5. A message stating that the inquiry has been sent is displayed in **Pending Attestations**.

Attestation history

You will find **Attestation History** in **My Actions**. Attestation cases that you have granted or denied are displayed here. If you are an auditor or manager, you may be able to view attestations performed by other employees. Some functions have already been described for the **My Attestation Status** and **Pending Attestations** menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To view attestation cases

1. Open **Attestation History**.
2. Select one of the following:
 - a. approved
 - b. not approved
 - c. outstanding
3. Perform one of the following tasks.
 - a. Use the extended search.
 - b. Use a filter and then mark the item you want in the result list.

The detailed content view provides detailed information about the selected attestation case on the **Information**, **Workflow**, **Attestation policy**, and **History** tabs.

Detailed information about this topic

- [Attesting pending attestations](#) on page 102
- [Viewing details](#) on page 102
- [Viewing employees authorized to make approvals](#) on page 107
- [Object attestations history](#) on page 107

Attestation inquiries

NOTE: This function is only available if the module Identity Management Base Module or Attestation Module is installed.

You can query requests or attestation cases. Attestation inquiries are displayed in **Attestation Inquiries**. You can see more information about the inquiry in the detailed content view. If there are no inquiries, the page is empty.

To answer an approval inquiry

1. Open **Attestation Inquiries**.
 2. Mark an inquiry in **Attestation Inquiries**.
 3. Click **Respond** to enter an answer.
- The answer is sent on saving. Confirmation verification is displayed.

Governance administration

The **Governance Administration** view is a menu item on the **Attestation** menu. You can execute various actions to do with the attestation policies you manage, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Managers or others responsible for compliance can use attestation policies to run the following tasks.

- Authorize access
- Set up permissions

Attestations start with attestation policies. You use these policies to specify which objects are designated for attestation and when and how often they are run.

You can get a high level overview of the attestations in your organization in the Attestation dashboard. For more information, see [What statistics are available?](#) on page 258.

Detailed information about this topic

- [Attestation runs](#) on page 110
- [Attestation policy settings](#) on page 113

Attestation runs

You will find the **Attestation runs** menu on the **Governance Administration** menu. The following table provides a larger overview of which content you can view in **Attestation Policy Runs**.

Table 32: The "Attestation Policy Runs" view

Column	Description
Attestation policy	Shows attestation policies that have already been run.
Run started	Start date of the attestation run.
Due date	Date on which the attestation run should end.
Progress so far	Shows the progress of already generated attestation cases of an attestation policy. Progress is shown in percent (only integer values) and with a colored bar. Progress under 70%, red bar. Progress above 90%, green bar. Progress between 70% and 80%, orange bar.

Once you have selected an attestation policy, you can view other details about it. These details are explained in the following table.

Table 33: Description of the detailed content view

Content Module / View	Description
Data	This content module is on Details . You will find information about the attestation run, expiry date, and progress up to now next to the name of the attestation policy.
Attestation details	This content module you can view current pending, completed, and delegated attestations. Another value is the total value of all existing attestation cases. There are more details about attestation cases with escalation and about speed of attestations.
Attestation forecast	Details such as the predicted progress on the due date and predicted end date of the run are part of the attestation forecast. More predictions about estimated delays, when attestation would expire under the currently given conditions. Apart from this, attestation is already graded into categories Good , Mediocre , and Bad .
Attestors	Information about opened and closed attestation cases and the attestors involved are displayed for the selected attestation run on Attestors . You can send reminders to the Compliance & Security Officer and the attestation policy owner but only if there are still pending attestation cases for this attestation policy. You can also renew the attestation, giving a reason.

Detailed information about this topic

- [Sending reminders for all attestation runs](#) on page 111
- [Sending reminders about selected attestation policy runs](#) on page 112
- [Extending an attestation run](#) on page 112

Sending reminders for all attestation runs

You can send reminders to attestors of all the visible attestation runs in the menu **Attestation Policy Runs**.

To send a reminder to the attestors

1. Open **Attestation Policy Runs**.
2. Click **Remind attestors of ALL visible runs** and write a message to the attestors in **Send reminder mail**.
3. Click **OK**.

Sending reminders about selected attestation policy runs

In **Attestation Policy Runs**, can also send a reminder to attestors who are responsible for a selected attestation run. Here you have the option to write to all approvers responsible or to individual approvers.

To send a reminder to the attestors

1. Open **Attestation Policy Runs**.
2. Select one of the following:
 - a. Good
 - a. Mediocre
 - b. Bad
3. Select an attestation policy.
 - a. Perform one of the following tasks.
 - i. Click **Send reminder** in the main detail window.
- OR -
 - ii. Open the **Attestors** tab in the main details window and select one or more approvers.
 - iii. Below the listed approvers, click the activated Send reminder **option**.
4. Write a message to the approvers in the **Send a reminder mail** dialog and confirm by pressing **OK**.

Extending an attestation run

You can extend an attestation policy run in **Attestation policy runs**. It is possible to extend all attestation policy runs.

To extend an attestation policy run

1. Open **Attestation Policy Runs** and mark an attestation policy run.
2. Click **Extend attestation run**.
3. Enter a new expiry date in the dialog and a reason for the extension.
4. Click **OK** to confirm.

Attestation policy settings

In the **Attestation Policy Settings** menu, as an administrator, you can create and edit attestation policies. The following functionality can be edited in attestation policies.

- Setting up a schedule after the attestation case is generated.
- Select an employee to be responsible for granting or denying approval of attestation cases.
- Enable/disable the setting used by the system to automatically close redundant attestation cases.

Apart from editing attestation policies, you can also create conditions and edit them. This function makes it possible for you to view all objects adhering to a certain condition.

You cannot edit all the properties in existing policies. This depends on your access permissions. In the **Attestation Policies Settings** menu, all attestation policies with the following information are displayed over various views.

Table 34: "Attestation Policy Settings" view

Column	Description
Attestation policy	Name of the attestation policy.
Attestation procedure	Name of the attestation procedure.
compliance framework	Compliance frameworks are used for classifying attestation policies, compliance rules, and company policies according to regulatory requirements.
Calculation schedule	Schedule used to generate new attestation cases.
Owner	Employee that created the attestation policy.
Actions	Several actions are available in this column. For example, you can edit, copy, or delete.

NOTE: Include deactivated policies must be set to view these policies.

Detailed information about this topic

- [Viewing attestation policies](#) on page 114
- [Adding attestation policies](#) on page 114
- [Editing attestation policies](#) on page 115
- [Modifying attestation procedures](#) on page 116
- [Copying attestation policies](#) on page 117
- [Deleting attestation policies](#) on page 117
- [Adding conditions](#) on page 118

- [Editing conditions](#) on page 119
- [Deleting conditions](#) on page 121
- [Objects affected by a condition](#) on page 121
- [Updating object selection](#) on page 122

Viewing attestation policies

NOTE: If a Compliance and Security Officer or an attestation manager has assigned ownership of an attestation policy to you, you can view your policy in **Attestation Policy Settings**.

To view your own attestation policies

1. Open the **Attestation Policy Settings** menu.

NOTE: Of the attestation policies you want to view, you are only shown those with attestation runs. If there are no attestation runs, the attestation policies are not listed.

2. Highlight the required attestation policy.

More information about the policy is displayed in the detailed content view. For more information, see [Attestation policy settings](#) on page 113.

NOTE: If you have no other permissions, you can only view your attestation policies. You cannot edit them.

Adding attestation policies

In the **Attestation Policies Settings** menu, you can add new attestation policies.

MOBILE: This function is not available in the mobile interface.

To create a new attestation policy

1. Open **Attestation Policy Settings**.
2. Click **New attestation policy** and enter the following master data for the attestation policy.

NOTE: The attestation procedure you select when you create a new attestation policy is important. The selected attestation procedure determines, amongst other things, the available options when conditions are added. The available options are

modified to match the attestation procedure.

Table 35: General master data for attestation policies

Property	Description
Attestation policy	Field for entering a unique name for the attestation policy.
Attestation procedure	Selecting the appropriate attestation procedure using Assign .
Approval policies	Selection of the appropriate approval policies using Assign .
Calculation schedule	Selection of the appropriate calculation schedules using Assign .
Time required (days)	Select of the number of days which specifies the deadline for making an attestation procedure approval decision.
Compliance frameworks	Assignment of an attestation policy to a compliance framework using Assign .
Deactivated	If this option is set, the new attestation is disabled. This option is not set by default.
Close obsolete tasks automatically	If this option is set, obsolete cases are automatically closed. This option is set by default.
Description	Field for entering a additional information and conditions for the attestation policy.

3. Click **Create**.

Editing attestation policies

You can edit attestation policies in **Attestation Policy Settings**. If you enable **Include deactivated policies**, you can also edit these policies.

To edit an attestation policy

1. Open the **Attestation Policy Settings** menu.
2. Mark the desired attestation policy and click  in the **Actions** column.

NOTE: The system contains default attestation policies. These policies can only be edited to a limited degree. Until now, only **Approval policy**, **Calculation schedule**, **Processing time** and the option **Close obsolete tasks automatically** could be edited. If you want to make changes to a default attestation policy, create a copy and edit the copy.

NOTE: If **Close obsolete tasks automatically** is set, you cannot hide processed attestation cases which are beyond the deadline.

3. Edit the policy as required in **Master data**.

For more information, see [Adding attestation policies](#) on page 114. You can also add new conditions, and change or delete existing ones. Your permissions determine which data you are permitted to edit. For more information, see [Adding conditions](#) on page 118.

4. Click **Save**.

Modifying attestation procedures

Before you save data or changes for attestation policies, you can set the link type for selecting the object. Set this in **Attestation procedure** when you add or edit a new attestation policy. The following link types are available.

Table 36: Link types

Link Type	Description	Example
All conditions must be fulfilled:	New attestation cases are added for all objects fulfilling all of the conditions the next time the attestation policy is executed. If one of the objects to attest does not fulfill a condition, this object is not attested. In addition, use of this link type generates a intersecting set of all the individual conditions of the selected objects.	Example: For the attestation policy of type "Membership in organizations", there are the condition "Departments with matching names" and "Attestation by attestation status". If this link type is set, the sum of the results for both conditions is displayed in addition to the results for each condition separately.
At least one condition must be fulfilled:	New attestation cases are added for all objects fulfilling at least one of the conditions the next time the attestation policy is executed. Use of this link type generates a superset of all the individual conditions of the selected objects.	Several conditions apply to the attestation policy mentioned above. During the attestation case, the superset of attestation objects is displayed as the sum of objects found because this link type requires at least condition to be met.

To select object link types

1. Open the **Attestation Policy Settings** menu.
2. Perform one of the following tasks:
 - a. Create a new attestation policy.
For more information, see [Adding attestation policies](#) on page 114.
 - b. Edit the desired attestation policy.
For more information, see [Editing attestation policies](#) on page 115.

3. Perform one of the following tasks:
 - a. Assign an attestation procedure to the attestation policy using **Assign** in **Master data**.
 - b. Assign a different attestation procedure to the attestation policy using **Change** in **Master data**.
4. Save the changes.

Copying attestation policies

In **Attestation Policy Settings**, you can also copy and edit attestation policies. If you enable **Include deactivated policies**, you can also edit these policies.

Copied attestation policies can be deleted again.

To copy an attestation policy

1. Open the **Attestation Policy Settings** menu.
2. Mark the desired attestation policy and click  in the **Actions** column.

NOTE: The system contains default attestation policies. These policies can only be edited to a limited degree. Until now, only **Approval policy**, **Calculation schedule**, **Processing time**, and the option **Close obsolete tasks automatically** could be edited. If you want to make changes to a default attestation policy, create a copy and edit the copy.

NOTE: If **Close obsolete tasks automatically** is set, you cannot hide processed attestation cases which are beyond the deadline.

3. Edit the policy as required in **Master data**.

For more information, see [Adding attestation policies](#) on page 114. You can also add new conditions, and change or delete existing ones. Your permissions determine which data you are permitted to edit. For more information, see [Adding conditions](#) on page 118.



4. Click **Save**.

Deleting attestation policies

In **Attestation Policy Settings** you can delete attestation policies.

Copied attestation policies can be deleted again both in **Attestation Policy Settings** and **Edit attestation policy**.


To delete an attestation policy

1. Open the **Attestation Policy Settings** menu.
2. Perform one of the following tasks.
 - a. Select the copied attestation policy and click  in the **Actions** column.
- OR -
 - b. Select the required attestation policy that you want to copy or that you have already copied, and click  in the **Actions** column.
The **Edit attestation policy view is displayed.**
 - c. Click **Delete** if you no longer need to edit the policy.
3. Confirm the delete prompt with **Yes**.
The attestation policy is removed from the list.

Adding conditions

When you edit attestation policies, you can also add new conditions to them. You can only add conditions to copies of attestation policies.

To add a condition to a policy



1. Open the **Attestation Policy Settings** menu.
2. Edit the desired attestation policy.
For more information, see [Editing attestation policies](#) on page 115.
3. In the **Master data** view, click  in the **Object selection** section.
4. Select the required option in the **Condition type** menu in **Edit condition**.

NOTE: The options available in **Condition type** depend on which attestation procedure is set for the attestation policy to be edited.

The following options are available.

Table 37: Available condition types

Condition Type	Description
All roles / cost centers	Lists all company structures. Multi-select is available. Selected parameters are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Attestation by attestation status/Roles by assignment type	Lists attestations by status or role assignment type as other parameter. Multi-select is available. Selected parameters are listed in the master detail and can be canceled there. Or you cancel

Condition Type	Description
	the selection in list again.
Specific roles / cost centers	List certain roles for the company structure, You can toggle between tree view and list view using  and  . Multi-select is possible. Selected roles are listed in the detailed content view and can be reselected there. Or you cancel the selection in list again.
Business roles / Application roles / Cost centers with matching names	Displays the Identifier field. Enter a name for the company structure.
New or not attested for x days	Displays the Count menu. You can enter the count.
Roles with specific owners / user accounts with specific people / Roles with any owner	Lists certain employees for the company structure. Additional columns can be shown and the filter function applied. Multi-select is available. Selected employees are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Roles with specific role classes	Lists specific role classes. Multi-select is available. Selected role classes are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Roles with defined risk index	Display a scale of 0 to 1 for the risk index and two slide rulers. Specify a beginning and an end value within the scale.
Roles with owners in departments	Lists departments which have owners. Multi-select is available. Selected role classes are listed in the master detail and can be canceled there. Or you cancel the selection in list again.

5. Save the changes.

Editing conditions

You can rework existing conditions by editing copied attestation policies.

To add a condition to a policy

1. Open the **Attestation Policy Settings** menu.
2. Edit the desired attestation policy.



For more information, see [Editing attestation policies](#) on page 115.

3. In the **Master data** view, click  in the **Object selection** section.
4. Select the required option in the **Condition type** menu in **Edit condition**.

NOTE: The options available in **Condition type** depend on which attestation procedure is set for the attestation policy to be edited.

The following options are available.

Table 38: Available condition types


Condition Type	Description
All roles / cost centers	Lists all company structures. Multi-select is available. Selected parameters are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Attestation by attestation status/Roles by assignment type	Lists attestations by status or role assignment type as other parameter. Multi-select is available. Selected parameters are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Specific roles / cost centers	List certain roles for the company structure, You can toggle between tree view and list view using  and  . Multi-select is possible. Selected roles are listed in the detailed content view and can be reselected there. Or you cancel the selection in list again.
Business roles / Application roles / Cost centers with matching names	Displays the Identifier field. Enter a name for the company structure.
New or not attested for x days	Displays the Count menu. You can enter the count.
Roles with specific owners / user accounts with specific people / Roles with any owner	Lists certain employees for the company structure. Additional columns can be shown and the filter function applied. Multi-select is available. Selected employees are listed in the master detail and can be canceled there. Or you cancel the selection in list again.
Roles with specific role classes	Lists specific role classes. Multi-select is available. Selected role classes are listed in the master detail and can be canceled there. Or you cancel the selection in list again.

Condition Type	Description
Roles with defined risk index	Display a scale of 0 to 1 for the risk index and two slide rulers. Specify a beginning and an end value within the scale.
Roles with owners in departments	Lists departments which have owners. Multi-select is available. Selected role classes are listed in the master detail and can be canceled there. Or you cancel the selection in list again.

Deleting conditions

You can delete conditions in **Attestation Policies**. The same applies here as for adding conditions. You can only delete conditions in a copied attestation policy.

To remove a condition from a policy

1. Open the **Attestation Policy Settings** menu.
2. Edit the desired attestation policy.
For more information, see [Editing attestation policies](#) on page 115.
3. Highlight the required condition in the **Master data** view and click the **Actions** column in the **Object selection**  section.
This deletes the condition.

Objects affected by a condition

You can display objects that apply for a specific or all conditions in the **Edit attestation policy** view.

To allow affected objects to be displayed

1. Open the **Attestation Policy Settings** menu.
2. Edit the desired attestation policy.
For more information, see [Editing attestation policies](#) on page 115.
3. Perform one of the following tasks:
 - a. Highlight the required condition and click the linked number in the **Objects** column in the lower area of **Object selection** in the **Master data** view.
 - b. Click the linked number under the list of conditions.
 Any objects that meet the condition(s) are displayed in a dialog.

Updating object selection

You can update the object selection in **Edit attestation policy** to see modifications. This might be necessary for checking if you have added any new conditions, for example.

To update the object selection list

1. Open the **Attestation Policy Settings** menu.
2. Edit the desired attestation policy.

For more information, see [Editing attestation policies](#) on page 115.

3. In the **Master data** view, click the **Object selection** section .

This reloads the object selection. New conditions, which may also be added to the Manager are also shown. For more information, see the One Identity Manager Attestation Administration Guide.

Auditing

| NOTE: This function is only available if the Attestation Module is installed.

Auditing is a submenu of **Attestation** and displays all attestation cases within a selected time period. The content and type of view vary in presentation depending on the respective company.

Some functions have already been described in the **My Attestation Status** menu. You can find all the functions available in this menu listed under "Detailed information about this topic".

Detailed information about this topic

- [Viewing attestation cases](#) on page 122
- [Viewing details](#) on page 102
- [Sending reminders](#) on page 103
- [Viewing employees authorized to make approvals](#) on page 107
- [Object attestations history](#) on page 107
- [Attesting pending attestations](#) on page 102

Viewing attestation cases

You can gather comprehensive information about attestation cases in the **Auditing** menu.

To view information about an attestation case

1. Open **Auditing** and select an employee using **Assign**.
2. Select one of the following:
 - approved
 - not approved
 - outstanding
3. Perform one of the following tasks:
 - Use a filter and then mark the item you want in the result list.
 - Mark the entry you want in the list.

This displays details of the selected item in the detailed content view.

Escalation

You will find the **Escalation** menu on the **Attestation** menu.

If there are attestations pending and the approver responsible is not available for an extended period or has no access to Web Portal, the fallback approver or member of the chief approval team must make an approval decision. For more detailed information about the chief approval team, see the One Identity Manager Attestation Administration Guide.

NOTE: You only see **Escalation** if you are a fallback approver or member of the chief approval team.

To view escalated attestations

- Open **Escalation**.

This displays escalated attestations.









Escalated attestations are handled in the same way as pending attestations. For more information, see [Viewing attestation cases](#) on page 122.





IMPORTANT: The four-eyes principle can be broken for attestations because chief approval team members can make approval decisions about attestation cases at any time!

Compliance

In the **Compliance** menu, you can execute various actions and obtain information. The following tables provide you with an overview of the menu items and actions that can be executed here.

Table 39: Items in the "Compliance" menu

Menu	Menu item	Action	Description
Compliance	My actions	 Pending Rule Violations	View all pending rule violations that you are responsible for and can approve.
		 Rule Violation History	View granted exception approvals.
		 Pending Policy Violations	View all pending policy violations that you are responsible for and can approve.
		 Policy violations	View edited policy violations.
	Auditing	 Rule violations	View all rule violations in the select time period.
		 Policy violations	View all policy violations in the select time period.
	Governance administration	 High-risk overview	View the top 10 statistics with critical objects, grouped by section. View all critical objects from different sections.
		 Compliance frameworks	View details about compliance frameworks.

Menu	Menu item	Action	Description
		 Rule violations	View all rules and their violations that are assigned to Frameworks under your supervision.
		 Policy violations	View all policies and their violations that are assigned to Frameworks under your supervision.
		 Rule analysis	View compliance rules containing SAP functions. View SAP user account that are involved with the rule violations.
		 Function analysis	View compliance rule violations by user accounts that are assigned to critical SAP functions.

Detailed information about this topic

- [My actions](#) on page 125
- [Auditing](#) on page 131
- [Governance administration](#) on page 132

My actions

My Actions is a submenu of **Compliance**. You can execute various actions to do with the compliance items you manage, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Detailed information about this topic

- [Pending rule violations](#) on page 126
- [Rule violation history](#) on page 129
- [Pending policy violations](#) on page 129
- [Policy violations](#) on page 130

Pending rule violations

Some rule violations can be approved as exceptions. You can see violations under your supervision in **Pending Rule Violations**. The following information is displayed in the corresponding menu.

Table 40: Possible content of rule violations

Display	Description
Employee	Employee who caused the rule violation.
Rule	Violated rule.
Approval state	The status of the approval. Following states are possible. <ul style="list-style-type: none">• Open• Exception granted• Exception denied
Approver	Employee who has denied or granted exception approval.
Approval date	Date of the approval decision.
Risk index (calculated)	Shows the calculated risk index.
Risk index (reduced)	Shows the risk index reduced by the mitigating control.
Reason	Shows the manually entered reason added with the exception approval.
Standard reason	Displays a standard reason if one exist and this option was selected.
Valid until	The exception is only valid until this date.

If you are an auditor or an approver, you can obtain more information about exception approvals from **Auditing**. For more information, see [Rule violations](#) on page 131.

To open the "Pending Rule Violations" menu

- Open **Compliance | My Actions** and click **Pending Rule Violations**.

Detailed information about this topic

- [Approving exception approvals](#) on page 127
- [Resolving rule violations](#) on page 127

Approving exception approvals

As exception approver, you can grant or deny approval to exception approvals in **Pending Rule Violations**.

To grant or deny exception approvals

1. If rules have been violated, open **Pending Rule Violations**.
2. Use the filter function in **Approval state** and set **Approval decision pending**.

Only the rule or policy violations of the selected type are displayed. For more information, see [Filter](#) on page 36.

3. Highlight the rule violation you want to approve in the list.

This displays details of the violation in the detailed content view and you can carry out various actions. How you continue depends on the view you find yourself in.

4. Perform one of the following tasks:
 - Approve the request with ☒ and click **Next**.
 - Deny the violation with ☐ and click **Next**.

Your selected is highlighted.

This displays **Approval exceptions**.

5. Perform one of the following tasks:
 - Enter an reason for your approval decision.
 - Select a predefined reason.

NOTE: You can optionally select a predefined text from **Standard reasons** for all cases still to be approved. Standard reasons are displayed in the approval history and in the case details. For more information about default reasons, see the One Identity Manager Compliance Rules Administration Guide or the One Identity Manager Company Policies Administration Guide.

NOTE: If you are editing several rule or policy violations at the same time, you can enter a reason for each one individually.

6. Click **Save**.

Your approval decision is saved and the rule or policy violation's status changes accordingly.

Resolving rule violations

As exception approver, you can edit violations of rule under your supervision. Rule violations are caused by permissions, so you have the option to remove permissions when you want to resolve one.

You can cancel the resolving process early because it is possible that you have removed other permissions while removing the violating permissions.

Permission assignments play an important role when editing rule violations. For example, permissions assigned through a dynamic role cannot be removed.

The following consequences may result from removing permissions:

Table 41: Removing assigned permissions

Assignment Method	Removing the Entitlement
Direct assignment	Direct assignment is deleted when the entitlement is removed.
Inherited assignment	The option to withdraw role membership from the employee is offered in the case of inherited permissions.
Dynamic assignment	Permissions cannot be removed if membership is through a dynamic role.
Assignment over IT Shop request	If permissions were assigned through a request, the request is canceled on removal.
Primary Assignment	The option to withdraw primary membership from the employee is offered in the case of permissions assigned through primary assignment.

To resolve a rule violation

1. Mark the rule violation and click **Resolve**.

This opens the wizard "Resolve a rule violation", listing the permissions that led to the violation.

2. Mark the rule violation you want to remove from the employee in **Resolve a rule violation** and click **Next**.

The objects are displayed with the permissions origin in **Verify**. The consequences of removing the permissions are displayed in **Action**.

3. Check whether you really want to delete the permissions and click **Next**.

A message is displayed in **Loss of entitlement** and the permissions are listed that are affected by removal.

4. Perform one of the following tasks.

- a. To cancel the resolution of rule violations, choose **Cancel** or **Back**.

All the employee's permissions remain intact.

- b. To continue with the resolution of the rule violation, choose **Continue**.

All permissions that were displayed for resolving the rule violation are withdrawn from the employee.

Rule violation history

You can view exception approvals that you have dealt with in the **Rule Violation History** menu.

To view the history of your exception decisions

1. Open **Rule Violation History** for rule exceptions.
2. Use the filter function in the **Approval state** column and set the option **Exception granted** or **Exception denied**.

Only historical rule or policy violations of the selected type are displayed. For more information, see [Filter](#) on page 36.

3. Select the rule or policy violation in the list.

You can view more information in the detailed content view.

Detailed information about this topic

- [Approving exception approvals](#) on page 127
- [Resolving rule violations](#) on page 127

Pending policy violations

Some policy violations can be approved as exceptions. You can see violations under your supervision in **Pending Policy Violations**. The following information is displayed in the corresponding menu.

Table 42: Managing rule and policy violations

Display	Description
Violating object	Object, which caused the violation.
Policy	Violated policy.
Status	The status of the approval. Following states are possible. <ul style="list-style-type: none">• Open• Exception granted• Exception denied
Approver	Employee who has denied or granted exception approval.
Approval date	Date of the approval decision.
Risk index (calculated)	Shows the calculated risk index.

Display	Description
Risk index (reduced)	Shows the risk index reduced by the mitigating control.
Reason	Shows the manually entered reason added with the exception approval.
Standard reason	Displays a standard reason if one exist and this option was selected.
Valid until	The exception is only valid until this date.

If you are an auditor or an approver, you can obtain more information about exception approvals from **Auditing**. For more information, see [Rule violations](#) on page 131..

Some functions have already been described in the menu **Pending rule violations**. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "Pending Policy Violations" menu

- Open **Compliance | My Actions** and click **Pending Policy Violations**.

Detailed information about this topic

- [Approving exception approvals](#) on page 127

Policy violations

To view the history of your exception decisions

1. Open **Policy Violation History** for policy exceptions.
2. Use the filter function in the **Status** column and set the option **Exception granted** or **Exception denied**.

This limits the list of historical policy violations displayed to the selected option. For more information, see [Filter](#) on page 36.

3. Select a policy violation from the list.

You can view more information in the detailed content view.

Detailed information about this topic

- [Approving exception approvals](#) on page 127

Auditing

Auditing is a submenu of **Compliance**. You can execute various actions, such as viewing all requests or viewing all approved requests, depending on which entitlements you have been assigned. These actions can be called up over tiles.

Detailed information about this topic

- [Rule violations](#) on page 131
- [Policy violations](#) on page 131

Rule violations

NOTE: This function is only available if the module Company Policies Module or Compliance Rules Module is installed.

All employees that have violated rules are displayed under **Rule violations**. **Auditing - Rule violations** shows you all rule violations within a selected time period. Rule violations that have been granted or denied exceptions or are pending are shown in **Rule violation**.

Some functions have already been described in the menu **Pending rule violations**. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open "Rule violations"

- Open **Compliance | Auditing** and click **Rule violations**.

Detailed information about this topic

- [Approving exception approvals](#) on page 127
- [Resolving rule violations](#) on page 127

Policy violations

NOTE: This function is only available if the module Company Policies Module or Compliance Rules Module is installed.

All employees that have violated policies are displayed under **Policy violations**. **Auditing - Policy violations** shows you all rule violations within a selected time period. Policy violations that have been granted or denied exceptions or are pending, are shown in **Pending policy violations**.

Some functions have already been described in the menu **Pending rule violations**. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open "Policy violations"

- Open **Compliance | Auditing** and click **Policy violations**.

Detailed information about this topic

- [Approving exception approvals](#) on page 127

Governance administration

NOTE: This function is only available if Compliance Rules Module, Governance Base Module, Company Policies Module ,or Attestation Module is installed.

Companies have different requirements that they need for regulating internal and external employee access to company resources. On the one hand, rules are used for locating rule violations and on the other hand, to prevent them. They may also have to demonstrate that they adhere to legislated regulations such as the Sarbanes-Oxley Act (SOX). The following demands are made on compliance.

- Rule define to what permissions the employee has or otherwise. For example, a rule could prevent an employee from owning entitlement B if they already have entitlement A.
- Policies are very flexible, and can be defined around anything you are managing with Manager. For example, a policy could state that only managers in the HR department can have full control over a share on a file share that contains sensitive information.
- Each item to which an employee has access can be given a risk value. A risk index can be calculated for employees, accounts, organization, roles, and for the groups of resources available for request. You can then use the risk indexes to help prioritize your compliance activities.

Some rules are preventative: A request will not be processed if it is in violation, unless exception approvals are specifically allowed, and an approver allows it. Rules (if appropriate) and policies are run on a regular schedule, and violations appear on the appropriate employee's Web Portal for handling. Policies may have associated mitigations, which are processes that an employee can do outside of the One Identity Manager solution to reduce the risks posed by the violation. Reports and dashboards give you further insights into your state of compliance. For more information, see [What statistics are available?](#) on page 258.

Which information you see in **Compliance** depends heavily on your role. If you do not see a menu item that you think you should, contact your system administrator. The following overview shows which view you can see for which user roles.

Table 43: View "Compliance"

View	Description	Roles
High-risk overview	Provides an overview of critical objects. The overview is divided into several parts.	Compliance and security officer
Compliance frameworks	Provides details about the compliance frameworks in your environment.	Compliance framework administrator
Rule violations	Provides reports on employees who violate policies.	Framework administrator, rule supervisor, and rule-exception approver
Policy violations	Provides reports on objects which violate policies.	Framework administrator, policy supervisor, and rule-exception approver
Rule analysis	Identifies employees who are in violation of rules related to SAP functions. You must configure SAP authorizations for testing. For more detailed information about SAP R/3 Compliance Add-on, see the One Identity Manager Identity Management Base Module Administration Guide. NOTE: the calculation of SAP functions must be activated by a manager.	Compliance framework administrator
Function analysis	Specifies employees whose access to high-risk SAP function violates the rules. NOTE: the calculation of SAP functions must be activated by an manager.	Rule supervisors

Detailed information about this topic

- [Risk assessment](#) on page 134
- [High-risk overview](#) on page 258
- [Compliance frameworks](#) on page 135
- [Rule violations](#) on page 136
- [Policy violations](#) on page 137
- [Rule analysis](#) on page 137
- [Function analysis](#) on page 138

Risk assessment

Risk assessment is an important part of compliance. For example, high risk rule violations are more likely to require mitigations, or have fewer exception approvers. In One Identity Manager, risk data is gathered from a variety of sources, and then calculations are performed to produce risk indexes. Every item within One Identity Manager can be assigned a risk value. If you own resources, you maybe able to modify their risk values in the Master Data. For more information, see [Master data](#) on page 166.

In **Risk Assessment**, you can modify the risk index functions that are used to calculate these indexes. Risk indexes are calculated for employees, user accounts, system roles, IT Shop structures, organizations, and business roles.

There are four calculation types that can be used. Choose the one that best fits the desired impact on risk for the risk index function you are modifying.


Table 44: Calculation types

Calculation type	Description
Maximum (weighted)	The highest value from all relevant risk indexes is calculated, weighted, and taken as basis for the next calculation.
Maximum (normalized)	The highest value from all relevant risk indexes is calculated, weighted with the normalized weighting factor and taken as basis for the next calculation.
Increment	The risk index of Table column (target) is incremented by a fixed value. This value is specified in Weighting/Change value .
Decrement	The risk index of Table column (target) is decremented by a fixed value. This value is specified in Weighting/Change value .
Average(weighted)	The average of all relevant risk indexes is calculated, weighted, and taken as basis for the next calculation.
Average(normalized)	The average of all relevant risk indexes is calculated with the normalized weighting factor and taken as basis for the next calculation.
Reduction	Used when calculating the reduced risk index for compliance rules, SAP functions, company policies and attestation policies. You cannot add custom functions with this calculation type!

You can assign a weight to the calculation, which determines how much the result of a particular function affects the overall risk index. You can view high risk objects in **High Risk Overview**. For more information, see [What statistics are available?](#) on page 258.

To edit a risk index function

1. Open **Compliance | Governance Administration** and click **Risk Assessment**.
2. Mark the risk assessment function you want to view.

3. Click  and select the required calculation type in the **Attestation of assignment** dialog.
4. Perform one of the following tasks:
 - a. Use the slider to set a value between 0 and 1 on the **Weighting/Change value** scale.
- OR -
 - b. Check **Disabled** if you no longer want to use the risk index function.
- OR -
 - c. Uncheck **Disabled** if you want to use the risk index function again.
5. Click **Save**.

High-risk overview

This overview lists high-risk objects and divides them into different groups that can be expanded and collapsed. Each of the groups displays resources with the highest risk factor, which you manage. Risk indexes are calculated for employees, user accounts, system roles, structures, organizations, and business roles. Risk indexes are calculated for employees, user accounts, system roles, IT Shop structures, organizations, and business roles, file systems, and SharePoint resources. Objects have risk values, which provide the risk index when combined with risk index functions. You can view the following information in **High-Risk Overview** statistics.

- Objects with the highest overall risk
- For more information on risk function calculators, see [Modifying Risk Calculators](#).

Compliance frameworks

NOTE: This function is only available if at least one of the modules Governance Base Module, Attestation Module, Compliance Rules Module, or Company Policies Module is installed.

Compliance frameworks group together various policies, rules, and attestations to correspond with regulatory requirements. Compliance frameworks are set up by an administrator, but can be viewed in the Web Portal.

This is required, for example, if you must comply to a certain framework. It is useful to know, which rules, policies, and attestation policies are connected with the framework.

To view a compliance framework

- Open **Compliance | Governance Administration** and click **Compliance Frameworks**.

A Hyper View of the framework appears, with a shape for the associated rules, policies, and attestation policies.

Rule violations

Certain roles require you to find violations within their own system. This information can help to determine gaps in your security or compliance policies and help to develop attestation policies or violation mitigation. Mitigation comprises processes existing outside the One Identity Manager solution and that reduce the risk of violation. For more information, see [Governance administration](#) on page 132.

You can generate reports that describe the rule violations exactly. These reports contain a risk assessment for you to use for prioritizing violations and on which to base subsequent planning. The reduced risk index takes into account many risk factors that arise from violations and represents the risk as a value between 0 (no risk) and 1 (high risk).

NOTE: You can only see **Policy Violations** or **Rule Violations** if you have the Compliance and Security Officer's or Auditor's application role.

Depending on which application is assigned to you, the following options are visible to you in your rule violation view:

- By framework
- By department
- By rule
- By application role
- All compliance rules

NOTE: If you only have one application role, you will not see any other options. The option corresponding to the application in this case is preset and must not be enabled by you.

To view rule violations

1. Open **Compliance | Governance Administration** and click **Rule Violations**.
2. Set one of the options shown to present the view more clearly.
3. Mark a rule.
4. Get further information.
5. Perform one of the following tasks:
 - a. Click of the links in the detailed content view to display more details.
 - b. Click "Show details" to display details about the selected rule.
 - c. Depending on your role assignments, you can generate a report using **Report**.

Policy violations

Certain roles require you to find policy violations within their own system. This information can help to determine gaps in your security or compliance policies and help to develop attestation policies or violation mitigation. Mitigation comprises processes existing outside the One Identity Manager solution and that reduce the risk of violation. For more information, see [Governance administration](#) on page 132.

You can generate reports, which exactly describe the rule or policy violations. These reports contain a risk assessment for you to use for prioritizing violations and on which to base subsequent planning. The reduced risk index takes into account many risk factors that arise from violations and represents the risk as a value between 0 (no risk) and 1 (high risk).

NOTE: You can only see the **Policy violations** or **Rule violations** if you have the compliance and security officer's or auditor's application role.

Depending on which application roles have been assigned to you, the following options are visible to you in your rule violation view:

- Framework administrator
- Policy supervisors
- Exception approvers
- All Policies

NOTE: If you only have one application role, you will not see any other options. The option corresponding to the application in this case is preset and must not be enabled by you.

To view rule violations

1. Open **Compliance | Governance Administration** and click **Policy Violations**.
2. Set one of the options shown to present the view more clearly.
3. Mark a rule.
4. Get further information.
5. Perform one of the following tasks:
 - a. Click of the links in the detailed content view to display more details.
 - b. Click "Show details" to display details about the selected rule.
 - c. Depending on your role assignments, you can generate a report using **Report**.

Rule analysis

Users who have access to certain critical SAP functions, may violate compliance rules and can pose a significant security threat. You should analyze these users to determine if action should be taken. Two menus help you with these tasks in the Web Portal.

Rule analysis shows compliance rules that contain SAP functions and identify each employee that violates the rules. You can analyze the rule violation to determine the cause.

To obtain information about SAP user accounts involved in violating rules.

1. Select **Compliance | Governance Administration** and click **Rule analysis**.
A list of compliance rules including SAP functions appears.
2. Click **Select** in the required entry to display the user accounts and employees related to the violated compliance rule.
You can determine which rules have violations by using the Critical Function Analysis.
For any employee who has violated the rule, you can analyze the violation by role or ability.
3. Perform one of the following tasks:
 - a. Click **By role** in the required entry to expand details about roles and profiles for the rule violation.
 - b. Click **By ability** in the required entry to expand details about the SAP functions and transactions.
 - c. Click **Back** to return to the list of employees.

Function analysis

Function analysis shows you employees with critical SAP functions that violate compliance rules. For each employee, you can determine what SAP function is involved in the violation and the rules that caused the violation. You can use the significance rating to prioritize your actions. If a rule with a significance rating is violated by an SAP function with a significance rating it must be handled promptly.









To identify employees who violate compliance rules with critical SAP functions.
















1. Select **Compliance | Governance Administration** and click **Critical function analysis**.
A list of employees who have certain critical SAP functions is displayed.
2. Click **Select** in the requested entry to display the SAP functions and rule violations for the selected employee.





Responsibilities

In the **Responsibilities** menu, you can run various actions and obtain information. The following tables provide you with an overview of the menu items and actions that can be executed here.

Table 45: Menu items for "Responsibilities"

Menu item	Action	Description
My responsibilities		
	 Employees	View your employees and their details. Add new people.
	 System entitlements	Viewing and editing your system entitlements with details. Add members and view historical data.
	 Business roles	View and edit your system roles and their details. Create new business roles or restore deleted ones. Split up, compare, or merge roles.
	 System roles	View and edit your business roles and their details. Create new system roles.
	 Departments	View and edit your departments and their details. Restore deleted departments or split, compare, and merge departments.
	 One Identity Manager Application Roles	View and edit your application roles and their details. Create new application roles.
	 Cost centers	View and edit your cost centers and their details. Restore deleted cost centers or split, compare, and merge cost centers.
	 Locations	View and edit your locations and their details. Restore deleted locations or split, compare, and merge deleted locations.

Menu item	Action	Description
	 Resources	View your resources and their details. Add new resources.
	 Assignment resources	View and edit your assignments resources and their details. Add entitlements and view historical data.
	 Multi-requestable/unsubscribable resources	View and edit Multi-requestable/unsubscribable resources and their details. Request memberships for employees and add permissions. View historical data.
	 Devices	View and edit your devices. Add new devices.
Task delegation		
	 Delegation	View those responsibilities you can delegate.
	 Delegation history	View your delegations to other staff and delegate responsibilities to them.
Ownerships		
	Claim ownership	Claim responsibility for a group that does not has no one in charge.
	 Assigning owners	Assigns an owner to a business object.
Auditing		
	 Departments	View one or all departments of the employee who is responsible for them.
	 Software	View one or all software applications of the employee who is responsible for them.
	 Business roles	View one or all business roles of the employee who is responsible for them.
	 Cost centers	View one or all cost centers of the employee who is responsible for them.
	 Multi-request resources	View one or all mulit-request resources of the employee who is responsible for them.
	 Employees	View all employee details.
	 One Identity Manager application roles	View one or all application roles of the employee who is responsible for them.
	 Resources	View one or all resources of the employee who is responsible for them.

Menu item	Action	Description
	 Locations	View one or all locations of the employee who is responsible for them.
	 System roles	View one or all system roles of the employee who is responsible for them.
	 Assignment resources	View one or all assignment resources of the employee who is responsible for them.
	 Active Directory	View one or all entitlements of the employee who is responsible for an Active Directory group.
	 Azure Active Directory	View one or all entitlements of the employee who is responsible for an Azure Active Directory group.
	 G Suite	View one or all entitlements of the employee who is responsible for a G Suite group.
	 IBM Notes	View one or all entitlements of the employee who is responsible for an IBM Notes group.
	 LDAP	View one or all entitlements of the employee who is responsible for an LDAP group.
	 Privileged Account Management	View one or all entitlements of the employee who is responsible for an Privileged Account Management group.
	 SAP R/3	View one or all entitlements of the employee who is responsible for an SAP R/3 group.
	 Universal Cloud Interface	View one or all entitlements of the employee who is responsible for an Universal Cloud Interface group.
	 UNIX	View one or all entitlements of the employee who is responsible for a Unix group.
Governance administration		
	 Business roles	View and edit business roles and their details. Restore deleted roles. Split up, compare, or merge roles.
	 System entitlements	View and edit system entitlements and their details. Add members, assign devices, and view historical data.

Detailed information about this topic

- [My responsibilities](#) on page 142
- [Task delegation](#) on page 213
- [Ownerships](#) on page 218
- [Auditing](#) on page 220
- [Governance administration](#) on page 234

My responsibilities

The **My Responsibilities** view is a submenu of the **Responsibilities** menu. Here you can view the tasks and entitlements under your supervision within your company. You can manage the following responsibilities: These actions can be called up over tiles.

- Employees
- Devices
- Hierarchical roles
 - Organizations
 - Departments
 - Cost centers
 - Locations
 - Business roles
- Company resources
 - System roles
 - System entitlements
 - System entitlements
 - Application roles
 - Resources
 - Assignment resources
 - Multi-request resources
 - Multi-requestable/unsubscribable resources
 - Software

Related topics

- [Employees](#) on page 143
- [System entitlements](#) on page 157

- [Business roles](#) on page 164
- [System roles](#) on page 177
- [Departments](#) on page 180
- [Cost centers](#) on page 182
- [Locations](#) on page 183
- [Application roles](#) on page 185
- [Resources](#) on page 203
- [Assignment resources](#) on page 205
- [Multi-request resources](#) on page 205
- [Multi-requestable/unsubscribable resources](#) on page 206
- [Software](#) on page 207
- [Devices](#) on page 208

Employees

You can add new people over the **People** menu. This function is mainly designed for adding external employees. For example, subcontractors who are not entered in the human resources department. Data from new employees is either transferred completely to the database or existing data is updated and/or augmented. This depends on the system configuration and the import setting from closed systems.

To open the "People" menu

- Open the menu **Responsibilities | My Responsibilities** and click **People**.

Detailed information about this topic

- [Adding employees](#) on page 144
- [Viewing rule violations](#) on page 145
- [Editing employee data](#) on page 146
- [Assigning new managers](#) on page 147
- [Creating a passcode](#) on page 147
- [Creating reports about employee data](#) on page 148
- [Displaying information](#) on page 144
- [Viewing risk indexes](#) on page 148
- [Adding new delegations](#) on page 148
- [Deleting or canceling delegations](#) on page 150
- [Displaying and deleting memberships](#) on page 150
- [Displaying assignment of an entitlement](#) on page 150

- [Requests](#) on page 151
- [History](#) on page 151
- [Timeline](#) on page 152
- [Status comparison](#) on page 153
- [Attestations](#) on page 155
- [Approving attestations](#) on page 156

Displaying information

On the **Responsibilities | My Responsibilities** page, in an overview, you can view a summary of all the relevant information about an object for which you are responsible. This information includes, for example, people, their request, rule violations, user accounts, subidentities, assigned permissions and memberships. They are displayed in shape elements.

To view an object's overview

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **People** tile.
3. On the **People** page, click on the employee want to view.
4. On the overview page of this employee, click the **Overview** tile.

Adding employees

You can add new employees in the **People** menu.

To add a new employee

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **People** and click **Add a new employee**.
3. Enter the required data in the text and selection fields and click **Save**.

Fields marked with * are compulsory. When saving, the system checks whether the combination of first and last name already exists.

There are different use cases that require different input sequences. The following tables layout the use cases and the respective input sequences.

Table 46: Use cases and input sequences when adding a new employee

Use Case	Input Sequence
If this combination of first and last	1. Confirm the prompt with OK .

Use Case	Input Sequence
name does not exist, you will be prompted to save the changes.	<p>This adds the new employee.</p> <ol style="list-style-type: none"> 2. Save the changes.
<p>If this combination of first and last name already exists, they are listed in the view Other employees with similar properties.</p> <p>In this case, you have two possible options.</p>	
If the employee you want to add is already in the list, you can select this data record and edit it. Proceed as follows.	<ol style="list-style-type: none"> 1. Mark the employees in the list whose data you want to use and click Update employee data. This displays a message and you are prompted to save the changes. 2. Confirm the prompt with OK. The new employee data is added with the existing data. You can edit or change the data. 3. Save the changes.
Another option is to add new data despite the duplicate data record.	<ol style="list-style-type: none"> 1. Click Add a new employee. A message is displayed and you are asked whether you want to add a new employee. 2. Confirm the prompt with OK. This adds the new employee. 3. Save the changes.

Viewing rule violations

You can view rule violations for your staff in the **People** menu.

To view your staff's rule violations

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and click **Rule violations**.

In the **Rule violations from direct subordinates** view, you can see the rule violations caused by your staff. The following information is listed in the view.

Table 47: Columns in "Rule violations by direct reports" view

Columns	Description
Employee	Name of the supervised employee
Rule violation	Unique rule violation ID.
Checked	Shows whether the rule violation was tested.
Exception is approved	Shows whether an exception was approved for the rule violation.
Risk index (calculated)	Shows the calculated risk index.
Risk index (reduced)	Shows the reduced risk index.
Approval date	Shows the approval date, if the rule violation was already checked.
Reason	Shows a reason for the approval decision about the rule violation.

Use the **View Settings | Additional columns** to show more columns in the view. The following columns are available.

Table 48: Additional columns for "Compliance rule violations by direct reports"

Columns	Description
Approver	The name of the approver checking the rule.
Valid until	Date specifying for how long the rule violation applies.
Standard reason	Default reason available for all rule violations. Multiple use is possible.

Editing employee data

You can edit your staff's data in the **People** menu.

To view and edit employee data

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **People**.
3. Use a filter and then mark the item you want in the result list.
4. Make the changes under **Master data** and click **Save**.

Detailed information about this topic

- [Filter](#) on page 36
- [Master data](#) on page 166
- [Employees](#) on page 226

Assigning new managers

In the **People** menu, you can assign new managers to your staff in their master data.

To assign an employee to a new manager

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and select an employee.
3. Select **Master data** and click **Assign to new manager**.
4. Select a new manager using **Change**.
5. On the **Assign to new manager** page, set a date and time from which the new manager takes effect.

NOTE: If the employee with the new manager already has approved requests or entitlements, they are deleted automatically on this date. If you want the employee to retain these requests or entitlements when transferring to the new manager, disable the **Delete on the effective date** or **Cancel on the effective date**.

6. Click **Submit** and choose **OK** to confirm.

Your changes are saved and the message **Your manager change request has been submitted.** is displayed in the employee's **Master data**.

NOTE: Your request to change managers is presented for approval in the **Pending Requests** menu of the approver responsible.

Detailed information about this topic

- [Approving assignment of new managers](#) on page 89
- [Approval history](#) on page 95
- [Pending requests](#) on page 85

Creating a passcode

If one of your staff has forgotten their password for logging into the Web Portal and the password cannot be reset with the question and answer function, you can create a passcode for them.

The passcode can only be used once and is only valid for a limited time period.

To create a passcode for an employee

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and select an employee.
3. Click **Passcode**.
The generated passcode and its validity are displayed in a dialog.
4. Note or mark the code and send the it and the validity period to the employee.

Creating reports about employee data

In **People**, you can create a report with the data from one of your staff.

To create a report

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **Employee**.
3. Use a filter and then mark the item you want in the result list.
4. Open **Master data** and click **Generate report**.
5. Perform one of the following tasks:
 - Enable **Create a report with history**.
 - Enable **Include data for sub identities in the report**.
6. Click **Generate report**.

Viewing risk indexes

You can view the risk index for any member of your staff in the **My Responsibilities** menu.

To view the risk index

NOTE: For more detailed information about risk assessment, see the *One Identity Manager Risk Assessment Administration Guide*.

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and select an employee.
3. Select **Risk** to view the risk index assessment view and click **View risk functions**.

Adding new delegations

In the **People** menu, you can an employee's delegate roles or responsibilities to another employee. You can delete or cancel delegations that have already been made.

To add a delegation

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu.
| **NOTE:** There is a filter to help you search for a particular employee.
3. Select the employee for delegation.
4. Click the **Delegations** tile.
5. On the **Delegations** page, click **New delegation**.
6. In the **Delegation of role memberships and responsibilities** dialog, use **Assign** to select an employee for delegation.
7. Click **Next**.
8. Select one or more roles/responsibilities and click **Next**.
9. Configure the following settings.

Table 49: New delegation

Setting	Description
Valid from	Start date and time of the delegation.
Valid until	Expiry date and time of the delegation.
Notify me if the recipient of the delegation makes a decision.	If the option is set, you receive a message in this case.
The recipient can delegate this role	If the option is set, the recipient of the delegation can delegate the role to someone else.
Reason	Field for entering a reason for delegating.
Priority	Menu for selecting a priority. The following priorities are available: <ul style="list-style-type: none">• Default• High• Medium• Low

10. Click **Save**.

Deleting or canceling delegations

You can delete or cancel delegations in **People**

To delete or cancel a delegation

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **Employee**.
| **NOTE:** There is a filter to help you search for a particular employee.
3. Select the employee for delegation.
4. Click the **Delegations** tile.
5. On the **Delegations** page, perform one of the following tasks:
 - In the **Delete** column, click ☒ for the relevant delegations and then **Actions | Delete delegation**.
 - Click **Actions | Delete all delegations**.
 - Select the delegation and click **Withdraw request** in the main detail view.

Displaying and deleting memberships

You can view your staff's memberships in the **People** menu and delete existing memberships.

These memberships are, for example, assigned entitlements or roles.

To view an employee's memberships and delete them.

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu.
3. Use a filter and then mark the item you want in the result list.
4. Click the **Entitlement** tile.
5. On the **Entitlements** page, mark the memberships you want to view and look at the details in the detailed content view.
6. Check the box in front of the membership you want to delete.
7. Click **Delete memberships**.

Displaying assignment of an entitlement

In the **People** menu you can view entitlement assignments in the **Entitlements** view.

To view an entitlement assignment

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click **People**.
3. Open **Employee**.
4. On the **People** page, click on the employee whose entitlements you want to view.
5. Click the **Entitlement** tile.
| **NOTE:** The option **Edit memberships** must be set.
6. On the **Entitlements** page, mark the desired entitlement.
7. In the detailed content view, click ► next to the **Analysis for** item.

This finds all the roles the employee belongs to. You can also see how the roles have been assigned. For example, roles might be assigned directly.

Requests

This view shows all the products that the employee has requested, or that have been requested for them, or by another employee, for example, a manager.

To search for a specific approval decision by approval

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **Employee**.
3. Use a filter and then mark the item you want in the result list.
4. Click the **Request** tile.
5. Perform one of the following tasks:
 - a. Use a filter and then mark the item you want in the result list.
 - b. Mark the entry you want in the list.

This displays details of the selected item in the detailed content view.

History

You can view history data for objects you manage in **My Responsibilities**. You can use **History** to see changes to a base object over time. It shows states and comparisons of base object attributes.

The history is divided into three views.

Table 50: History views

View	Description
Events	Displays all events affecting the base object, on a timeline. This is the default History view.
Status overview	Displays a list of modified properties with their validity period and dates when they were changed.
Status comparison	Displays the differences between in the current and selected time point.

To open the history

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and select an employee.
3. Select **History**.
4. Open **Locations** and select a location.

Timeline

In the history's **Timeline** view, you can run different actions and configure settings to view events from the past to the present. The following table explain the options.


Action	Input Sequence
Move backward or forward	<ol style="list-style-type: none"> 1. Click the timeline and hold down the left mouse key. 2. Perform one of the following tasks: <ol style="list-style-type: none"> a. Drag the marking to the left to go forward in time on the timeline. b. Drag the marking to the right to go back in time on the timeline.
Change the display within the timeline	<ul style="list-style-type: none"> • Turn the mouse wheel to zoom in or zoom out. <p>The timeline view can vary from months to hours.</p>
Switch to table view	<ul style="list-style-type: none"> • Click Switch to table view below the timeline. <p>This switches views and the same data is shown in a table. The table displays the change type, property, new, and old value of the change and the date of change, amongst others. To return to the timeline view, click Switch to timeline view.</p>
View event details	<ul style="list-style-type: none"> • Click one of the colored elements on the timeline to view a particular event in more detail.

Action	Input Sequence												
Apply filter	<ol style="list-style-type: none"> Click Filter by... and select an entry from the following. <table> <tr> <th>Filter</th><th>Description</th></tr> <tr> <td>User</td><td> <p>Searches for events or actions associated with the given name.</p> <p>Employees with entitlements and ownerships create changes, such as adding or removing properties. You can view these actions on the timeline.</p> </td></tr> <tr> <td>Change type</td><td> <p>Lists all changes types, which can be selected for displaying in the timeline.</p> <p>Multi-select is possible.</p> </td></tr> <tr> <td>Date</td><td> <p>List all actions and events for the selected date.</p> </td></tr> <tr> <td>Property</td><td> <p>Lists all properties, which can be selected for displaying in the timeline.</p> <p>Properties are, for example, employee, manager, or dynamic role.</p> <p>For more detailed information about assigning through dynamic roles, see the One Identity Manager Identity Management Base Module Administration Guide.</p> <p>Multi-select is possible.</p> </td></tr> <tr> <td>Display</td><td> <p>Searches for all text data matching the given search term.</p> <p>The following settings are available.</p> <ul style="list-style-type: none"> • All words • Starts with... • Ends with... • One or more words </td></tr> </table> Apply the selected filter with Filter on. 	Filter	Description	User	<p>Searches for events or actions associated with the given name.</p> <p>Employees with entitlements and ownerships create changes, such as adding or removing properties. You can view these actions on the timeline.</p>	Change type	<p>Lists all changes types, which can be selected for displaying in the timeline.</p> <p>Multi-select is possible.</p>	Date	<p>List all actions and events for the selected date.</p>	Property	<p>Lists all properties, which can be selected for displaying in the timeline.</p> <p>Properties are, for example, employee, manager, or dynamic role.</p> <p>For more detailed information about assigning through dynamic roles, see the One Identity Manager Identity Management Base Module Administration Guide.</p> <p>Multi-select is possible.</p>	Display	<p>Searches for all text data matching the given search term.</p> <p>The following settings are available.</p> <ul style="list-style-type: none"> • All words • Starts with... • Ends with... • One or more words
Filter	Description												
User	<p>Searches for events or actions associated with the given name.</p> <p>Employees with entitlements and ownerships create changes, such as adding or removing properties. You can view these actions on the timeline.</p>												
Change type	<p>Lists all changes types, which can be selected for displaying in the timeline.</p> <p>Multi-select is possible.</p>												
Date	<p>List all actions and events for the selected date.</p>												
Property	<p>Lists all properties, which can be selected for displaying in the timeline.</p> <p>Properties are, for example, employee, manager, or dynamic role.</p> <p>For more detailed information about assigning through dynamic roles, see the One Identity Manager Identity Management Base Module Administration Guide.</p> <p>Multi-select is possible.</p>												
Display	<p>Searches for all text data matching the given search term.</p> <p>The following settings are available.</p> <ul style="list-style-type: none"> • All words • Starts with... • Ends with... • One or more words 												

Status comparison

In the history's **Status comparison**, you can compare the current status of objects with other points in the past.

To compare object statuses

- Perform one of the following tasks:
 - Click **Compare** in the event dialog, if you have clicked on the event on the timeline.
This compares the current object status with the point of the selected event and displays the result in **Status comparison**.
 - Select **Status comparison** and click  next to the field to select the date.

The statuses and comparisons displayed in the history overview are dependent on the type of base object selected. The following attributes can be displayed.

Table 51: Overview of base objects and their attributes



Base object type	Attribute
Employee	Change of base object property
	Responsibility for an employee
	Responsibility for a department
	Responsibility for a cost center
	Responsibility for a location
	Membership in an application role
	Membership in a department
	Membership in a cost center
	Membership in a location
	Assignment to a resource
	Assignment to a software application
	Identifying a compliance rule violation
	Assignment to a business role
	Responsibility for a business role
Department	Responsibility for a system role
	Assignment to a system role
Cost center	Assignment to a target system account
Location	Change of base object property
Business role	Employee membership
	Assignment to a resource
	Assignment to a system role

Comparing an employee's status

In the **My Responsibilities** menu, you can compare the current status of an employee with a status from the past in the **History** view. This compares attributes, which have changed within a specified time period. You specify the time period yourself in the date control provided.

This comparison is also available for company structures.

To run a comparison of an employee's status

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open the **People** menu and select an employee.
3. Select the **Status comparison** view under **History**.
4. Click  and  to select a date and time with which you want to compare the employee's current status.

All the attributes for this employee are displayed in a list. By default, all attributes are selected.

NOTE: You can apply a filter to all columns in the view. For more information, see [Filter](#) on page 36.

Attestations

NOTE: This function is only available if the module Attestation Module is installed.

In the **Attestation** view under **Employee**, you can see your employee's attestation cases. You will see both attestation cases approved or denied by you and pending attestation.

In **Attestations**, you can switch between different views.

- Group memberships
- Objects attestation
- All attestation cases

For each case you can see the current status and the creation date in the detailed content view. You can run the following action or get information.

- See whether the case was approved or denied.
- Obtain detailed information about the selected attestation case from the **Information**, **Workflow**, **Attestation policy** and **History** tabs.
- As attestor, you can view attestors for pending attestation cases.
- Send a reminder.
- Approve attestation cases for object attestations as approver.

Detailed information about this topic

- [Viewing details](#) on page 102
- [Attesting pending attestations](#) on page 102
- [Sending reminders](#) on page 103

Approving attestations

In the **Employee** menu under **Attestation**, you can make approval decisions for employee's pending attestations.

NOTE: You can also make approval decisions in **Pending Attestations**.

To approve pending attestations

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Open **Employee**.
3. Use a filter and then mark the item you want in the result list.
4. Select **Attestations** and open either **Object attestation** or **All attestation cases**.
5. Select **Approve**.

This opens **Pending attestations**.

6. In the pending attestations view, select the required case.
7. Perform one of the following tasks:
 - Grant approval by clicking ☒.
 - Deny approval by clicking ☐.
8. If required, repeat step 3 and click **Next**.
9. Perform one of the following tasks:
 - Enter a reason for your decision in the field.
 - Select an available reason in the **Standard reason** field.

NOTE: You have the option of selecting a predefined text for all cases still to be approved using the **Standard reason** menu. Standard reasons are displayed in the approval history and in the case details. For more detailed information about default reasons, see the One Identity Manager Attestation Administration Guide.

10. Click **Save**.

NOTE: Some attestation cases that still need to be approved, require multi-factor authentication. After your approval decision has been saved, you will prompted to enter a security code. For more information, see [Requesting products that require multi-factor authentication](#) on page 80.

System entitlements

System entitlements map the objects that control access to target system resources in the target systems. A user account obtains the required permissions for accessing target system resources through its memberships in system entitlements.

The following system entitlements, for example, are displayed on the **System entitlement** page:

- Active Directory groups
- SAP groups
- SharePoint groups
- Privileged Account Management groups

You can run the following tasks in system entitlements, if you own them.

- View a variety of information about the system entitlement (in a Hyper View), its members, attestation cases and usage of the different role classes.
- Add a new owner role and assign a product owner to an Active Directory group if you are target system administrator. You can also edit the requestability of an Active Directory group.
- Change the properties of the entitlement.
- Add members to system entitlements.
- Obtain an overview of all groups that are members of a system entitlement.
- Analyze that state and compare attributes of the base object.
You can perform this task in the historical data view.

To show system entitlements

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. Click the **System entitlements** tile.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Editing master data](#) on page 159
- [Attestations](#) on page 160
- [Owner](#) on page 161
- [New owner role](#) on page 161
- [Moving responsibilities](#) on page 161
- [Usage](#) on page 162

- [Child groups](#) on page 163
- [History](#) on page 151
- [Timeline](#) on page 152
- [Status comparison](#) on page 153
- [Statistics](#) on page 177

Adding memberships

NOTE: This function is only available if the module Identity Management Base Module, Business Roles Module, System Roles Module or Target System Base Module is installed.

You can add members to roles, organizations, and entitlements for which you are responsible and have the required access. This is an alternative to making a request for membership on behalf of an employee.

You can delete memberships as well as adding them.

NOTE: Employees cannot be assigned to assignment resources.

To request new membership

1. Perform one of the following tasks:
 - Under **System entitlement**, open **Memberships** for the required system entitlement.
 - Under **Business roles**, open **Memberships** for the required business role.
 - Under **System roles**, open **Memberships** for the required system role.
 - Under **Departments**, open **Memberships** for the required department.
 - Under **Cost centers**, open **Memberships** for the required cost center.
 - Under **Locations**, open **Memberships** for the required location.
 - Under **Resources**, open **Memberships** for the required resources.
 - Under **Assignment resources**, open **Memberships** for the required resource.
 - Under **Multi-request resources**, open **Memberships** for the required resource.
 - Under **Multi requestable/unsubscribable resources**, open **Memberships** for the required resource.
 - Under **Software**, open **Memberships** for the required software application.
2. Click **Request memberships**.
3. Select the required employee (multi select is permitted) and click **Move to shopping cart**.

Your shopping cart appears. For more information, see [Edit shopping cart](#) on page 77.

Deleting memberships

Deleting memberships is similar to a requests workflow. You can delete members from roles, organizations, and entitlements for which you are responsible and have the required access. The assignment is removed by the deletion process.

NOTE: Employees cannot be assigned to or deleted from assignment resources.

To delete a membership

1. Perform one of the following tasks:
 - a. Under **System entitlement**, open **Memberships** for the required system entitlement.
 - b. Under **Business roles**, open **Memberships** for the required business role.
 - c. Under **System roles**, open **Memberships** for the required system role.
 - d. Under **Departments**, open **Memberships** for the required department.
 - e. Under **Cost centers**, open **Memberships** for the required cost center.
 - f. Under **Locations**, open **Memberships** for the required location.
 - g. Under **Resources**, open **Memberships** for the required resources.
 - h. Under **Assignment resources**, open **Memberships** for the required resource.
 - i. Under **Multi-request resources**, open **Memberships** for the required resource.
 - j. Under **Multi requestable/unsubscribable resources**, open **Memberships** for the required resource.
 - k. Under **Software**, open **Memberships** for the required software application.
1. Click **Delete memberships**.

This deletes the membership.

Editing master data

You edit master data in **System Entitlements** if you want to edit requestability settings.

NOTE: This function is only available if the module Active Roles Module is installed.

To change the master data of a group managed by an Active Roles

1. Open **System entitlements** and select the required system entitlement managed by an Active Roles.
2. Select **Master data**.
3. Perform one of the following tasks:

- Enable **Only use in IT Shop**.
- Enable **Approval by the owner of the group**.
- Enable **Approval by a additional owner of the group**.
- Choose **Change** to select a different service item.

Attestations

You can view pending attestation on your system entitlements.

In the **Attestation** view, you can switch between the following views and see membership attestations in system entitlements or system roles. Which views you see, depends on the selected company structure.

In **Attestations**, you can switch between different views.

- Memberships
- Group memberships
- Objects attestation
- All attestation cases

For each case you can see the current status and the creation date in the detailed content view. You can run the following action or get information.

- See whether the case was approved or denied.
- Obtain detailed information about the selected attestation case from the **Information**, **Workflow**, **Attestation policy** and **History** tabs.
- As attestor, you can view attestors for pending attestation cases.
- Send a reminder.

To view attestations of the desired area of responsibility

1. Perform one of the following tasks:
 - Open **System entitlements** and select a system entitlement.
 - Open the **System Roles** menu and select a system role.
2. Select **Attestations**.

Detailed information about this topic

- [Viewing details](#) on page 102
- [Attesting pending attestations](#) on page 102
- [Sending reminders](#) on page 103

Owner

| NOTE: This function is only available if the module Active Directory Module is installed.

In the **System entitlements** menu, you can assign new product owners to Active Directory groups.

But you can also create a new owner role or move responsibilities.

To change the product owner of an Active Directory.

1. Open **System entitlements** and select the required Active Directory group.
2. Select the **Owner** view and click **Change**.
3. Select another product owner from the list.

New owner role

| NOTE: This function is only available if the module Active Directory Module is installed.

In the **System entitlements** menu, you can assign new product owners to Active Directory groups.

To assign a new product owner to an Active Directory group

1. Open **System entitlements** and select the required Active Directory group.
2. Select **Owner** and click **New**.

| NOTE: Before you can assign a new product owner, you must add a new owner role for this employee.

3. Enter a name for the new owner role and a reason for creating it.

| NOTE: After adding the new owner role, assign a product owner to it.

4. Use the **Assign** link to select a new product owner and select the new owner role through the **Product owner** link.

| NOTE: If **Without owner in AD** was selected in **Product owner**, you cannot select a product owner.

Moving responsibilities

| NOTE: This function is only available if the module Active Directory Module is installed.

In the **System entitlements** menu, you can move all owners of a role to a new owner role.

To change the product owner of an Active Directory.

1. Open **System entitlements** and select the required Active Directory group.
2. Select **Owner** and click **Move ownership**.
This opens **Move ownership to new owner role** with the note that a new owner role will be added.
3. Set **Move all owners** in the dialog if you want to move all owner to the new role.

Attestors

In **System entitlements**, you can change attestors at Active Directory groups.

But you can also create a new attestor or move responsibilities.

| NOTE: Before you can assign a new attestor, you must add a new application role.

To assign an attestor to an Active Directory group

1. Open **System entitlements** and select the required Active Directory group.
2. Select **Attestors**.
3. Perform one of the following tasks:
 - a. Click **Change**.
 - b. Select another attestor from the list.- OR -
 - a. Click **New**.
 - b. Enter a name for the new application role and a reason for creating it.
 - c. Select an attestor using the **Assign** link and the new application role using the **Attestor** link.

Usage

Roles are used to help manage assignments to employees. For example, instead of assigning many resources separately to an employee, you can add them to a role that inherits the proper assignments from a role class. A role class is the highest level, and roles can be nested in it. In **Usage**, you see all role members that can be a member of the selected entry. If you select a role class, you can view all the members with a role.

Information is displayed as a hierarchical chart, so you can drill in and see the role inheritance.

| MOBILE: This function is not available in the mobile interface.

To view employee assignments of a role class

1. Perform one of the following tasks:
 - a. Open **System entitlements** and select a system entitlement.
 - b. Open **Business Roles** and select a business role.
 - c. Open **System Roles** and select a system role.
 - d. Open **Department** and select a department.
 - e. Open **Cost Center** and select a cost center.
 - f. Open **Locations** and select a location.
 - g. Open **Resources** and select a resource.
 - h. Open **Assignment resources** and select a resource.
 - i. Open **Multi-request resources** and select a resource.
 - j. Open **Multi requestable/unsubscribable resources** and select a resource.
 - k. Open **Software** and select a software application.
2. Select **Usage**.
3. Select a role class.

This displays employee assignments for the selected role class.
4. Open the legend for the selected role class with **More information**.

Child groups

Some groups own group memberships. The **Child groups** view is only available for these groups. Not only do you have an overview of existing group memberships, you can also add them. For this, you assign a child group to the selected group. The following groups can, for example, own group memberships or allow assignment of child groups.

- Active Directory groups
- LDAP groups
- Notes groups
- Custom target system

In the following step-by-step, adding a group membership is described on the basis of an Active Directory group.

To assign a child group to a group

1. Open **System entitlements** and select an Active Directory group.
2. Select **Child groups** and click **New child group**.
3. Select a child group using **Assign** and save it.

The selected child group is displayed in **Child groups**.

Business roles

NOTE: This function is only available if the module Business Roles Module is installed.

Business roles are defined based on the resources needed to perform a particular function. The roles that appear on this list are roles that you are responsible for administering.

For each business role you own, you may be able to:

- View information about the business role, members, and entitlements, risk assessment and rule violations, attestation cases and usage of various role classes.
- Change the properties of the role.
- Add members to the role.
- Add entitlements to the role.
- View statistics.

NOTE: As administrator, you can view and edit all business roles in the **Business Roles** view by clicking on the link provided.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "Business Roles" menu

- Open the menu **Responsibilities | My Responsibilities** and click **Business Roles**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [New business roles](#) on page 165
- [Restoring deleted roles](#) on page 236
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Adding entitlements](#) on page 168
- [Deleting entitlements](#) on page 168
- [Compliance](#) on page 172
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- [History](#) on page 151
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- [Restoring a previous state](#) on page 174
- [Usage](#) on page 162
- [Compliance reports](#) on page 175
- [Attestations](#) on page 176
- [Statistics](#) on page 177

New business roles

In **Business Roles**, you can add new business roles. To do this, you enter the master data.

To add a new business role

1. Open **Business roles** and click **New business role**.
2. Set the following in **Create a new business role** and click **Save**.

NOTE: Any fields that are not marked with an asterisk (*) are optional. Optional fields can be filled in when you create the application or at a later stage.

Table 52: New business role master data

Setting	Description
Business role	Field for a business role.
Short name	Field for a shorten name.
Internal name	Input name for the internal name.
Role class	Menu for selecting the role class
Parent business role	Link for selecting the parent business role
Role type	Menu for selecting the role type.
Role approver	Link for selecting an application role as approver
Role approver (IT)	Link for selecting an application role as approver (IT)
Manager	Link for selecting an employee as manager By default, the logged in user is assigned as the manager. The business role is displayed with the manager responsible.
Deputy manager	Link for selecting the deputy manager
Employees do not inherit	If set, employees are prevented from inheriting

Setting	Description
Description	Field for entering a reason for the new business role.
Comment	Field for tips and information.

Restoring deleted roles

Another function for managing roles is restoring deleted roles. An example of a deleted role could be roles that have been sorted out during merging.

This function is also available in the views of managed organizations. Restoring a deleted role is described in the following step-by-step on the basis of a business role.

To restore deleted roles

1. Perform one of the following tasks.
 - Open the **Business roles** menu and **Restore a deleted role**.
 - OR -
 - Restore a lower-level role by selecting a business role in the **Business roles** menu and clicking **Restore**.

This opens a dialog. The view **Select deleted role** is enabled and lists all the deleted objects.

| NOTE: You can set a date in order to limit your search for deleted roles.

2. Select the desired role and click **Next**.
Multi-select is possible. The view **Verify** appears and lists the actions that will be run on restore.
3. You can deselect individual actions if you do not want to run them all. Click **Continue**.
4. Close the dialog.

Master data

| NOTE: This function is only available if the module Business Roles Module or System Roles Module is installed.

Depending on your responsibilities and approvals, you can change your responsibility properties. For example, you can change the name of a department to make it easier for your staff or add managers for sharing data.

In the step-by-step, editing a responsibility is explained on the basis of business role master data. Editing options vary and depend on the selected object type.

To edit your responsibility properties

1. Perform one of the following tasks.
 - a. Open the **Business Roles** menu and select a business role.
 - b. Open the **System Roles** menu and select a system role.
 - c. Open the **Departments** menu and select a department.
 - d. Open the **Cost Centers** menu and select a cost center.
 - e. Open the **Locations** menu and select a location.
 - f. Open the **Resources** menu and select a resource.
 - g. Open the **Software** menu and select a software application.
2. Open the **Master data**.
3. Make the following changes and click **Save**.

The settings vary and are dependent on the selected object type.

Table 53: Business role master data

Setting	Description
Object type	Field for the object type name. The field's identifier depends on the selected object type.
Short name	Field for a shorten name.
Internal name	Field for the internal name.
Role class	Link for selecting the role class.
Parent business role	Link for selecting the parent business role.
Role type	Menu for selecting the role type.
Manager	Link for selecting an employee as manager. By default, the logged in user is assigned as the manager. The business role is displayed with the manager responsible.
Deputy manager	Link for selecting the deputy manager.
Attestors	Link for selecting the parent business role.
Department	Link for selecting the department.
Location	Link for selecting the location.
Role approver	Link for selecting an application role as approver.

Setting	Description
Role approver (IT)	Link for selecting an application role as approver (IT).
Description	Field for entering a reason for the new business role.
Comment	Field for tips and information.

Adding entitlements

NOTE: This function is only available if the module Identity Management Base Module, Business Roles Module or System Roles Module is installed.

Entitlements are items to which an employee belongs or is assigned, such as groups, accounts, roles, applications, and so on. You can add entitlements to organizations or roles for which you are responsible, and have the required access. The types of entitlements available depend on the systems in use in your company. When you add an entitlement, it is treated like a request, and you must process it using your cart. There are two ways for an employee to obtain entitlements.

- By making a request which is approved.
- Indirectly, by being assigned a role or belonging to an organization that has been assigned the entitlement.

NOTE: In order to set permissions for organizations, business, or system roles in the **Requests** menu, the appropriate settings have be made in the Manager.

To add entitlements

1. Perform one of the following tasks:
 - a. Open **Business Roles** and select a business role.
 - b. Open the **System Roles** menu and select a system role.
 - c. Open **Department** and select a department.
 - d. Open **Cost Center** and select a cost center.
 - e. Open **Locations** and select a location.
2. Select **Entitlements** and click **New**.
3. Select a type of entitlement and click **Request**.

Your shopping cart appears. For more information, see [Shopping cart](#) on page 76.

Deleting entitlements

In the **Entitlements** view of a responsibility you can delete entitlements in the same manner.

To delete an entitlement

1. Perform one of the following tasks:
 - a. Open **Business Roles** and select a business role.
 - b. Open the **System Roles** menu and select a system role.
 - c. Open **Department** and select a department.
 - d. Open **Cost Center** and select a cost center.
 - e. Open **Locations** and select a location.
2. Select **Entitlements** and click **Remove entitlement**.

Splitting a role

The original idea behind splitting a role is to take assignments from role A and transfer them to role B. An example of role splitting could be, if memberships assigned to role B have less entitlements as memberships assigned to role A.

By splitting role A assigned memberships and individual entitlements of role A can be retained, moved, or copied to role B.

Any combination of role types is allowed.

To split a role

1. Perform one of the following tasks:
 - Open **Business Roles** and select a business role.
 - Open the **System Roles** menu and select a system role.
 - Open **Department** and select a department.
 - Open **Cost Center** and select a cost center.
 - Open **Locations** and select a location.
2. Select **Split**.

This opens a dialog. **New role data** is shown.
3. Configure the following in **New role data** and click **Next**.

Fields marked with * are compulsory.

Table 54: Settings in the view "New role data"

Role type	Setting	Description
All	Type of the new role	Menu for selecting a type for the new role The following object types are available in the Web Portal.

Role type	Setting	Description
All	Department / Business role / Cost center / Location *	Field for the new role's name A name must be entered for every role type.
All	Short name	Text box for entering a short name for the role. This is compulsory (*) for the role type 'cost center'.
Department	Object ID	Field for an object ID for the new role
Location / business role	Location	Field for entering a location
Business role	Internal name	Field for an internal name for the business role
Location	Name	Field for entering the location's name
Department / Business role / Cost center / Location	Manager	Menu for selecting a manager responsible
Department	Deputy manager	Menu for selecting a deputy manager
Business role	Role class *	Role class menu
Business role / Cost center / Location *	Deputy manager	Menu for selecting a deputy manager Employees do not inherit is also available.
Department	Parent department / Attestor / Cost center / Role approver / Role approver (IT)	Menu for selecting the respective settings
Business role	Parent business role / Role type / Role approver / Role approver (IT)	Menus for selecting the respective settings
Cost center	Parent cost center / Attestor / Department / Role	Menus for selecting the respective settings

Role type	Setting	Description
	approver / Role approver (IT)	
Location	Parent location / Attestor / Department / Cost center / Role approver / Role approver (IT)	Menus for selecting the respective settings
All	Description	Field for more detailed description
Business role	Comment	Field for additional comments


After clicking **Next**, the **Splitting** view opens. The view is divided into the sections **No change**, **Copy to new role** and **Move to new role**, which are differentiated by color.

All memberships assigned to role A are listed in **Copy to new role**. Assigned members are copied to the new role by default. This means, they are contained in role A and in role B after splitting.

However, You can copy or move these members to the new role or retain them. The following edit options are available. Edit options also apply to assigned entitlements.

Table 55: Assignment edit options and effects on role A and role B

Section	Action	Significance
No change / Copy to new role / Move to new role	Keep this assignment.	The entitlement / membership remains in role A.
	Keep and copy to new role.	The entitlement / membership is copied to role B. It is now in role A and in role B.
	Move to the new role.	The entitlement / membership is moved to role B. It is now in role B but not in role A.

4. Configure the assigned memberships and entitlements by navigating to an object, an employee in **Copy to new role**, for example, and clicking .
5. Select one of the following actions from the menu:
 - Keep this assignment.
 - Keep and copy to new role.
 - Move to the new role.
6. Click **Next**:

The **Verify** view is displayed and lists the actions that are set.

7. You can deselect individual actions if you do not want to run them all.
8. Click **Next**.
Save changes to the script. This opens **Results**.
9. Close the dialog.

Compliance

In the **My Responsibilities** menu, you can view the business role compliance rule violations for which you are responsible.

To view compliance rule violations

1. Open the **Business Roles** menu and select a business role.
2. Click **Compliance**.

This displays the **Compliance** view. If rule violations exist, they are listed.

The following information appears:

Table 56: The "Compliance" view

Columns	Description
Permission	Name of permissions that caused the rule violation.
Rule	Name of the rule that caused the rule violation.
Risk index	Shows the calculated risk index.
Risk index (reduced)	Shows the risk index reduced by the mitigating control.

In the main content view, other details about the marked compliance rule violations are displayed, such as, a description and the object class.

Compare and merge

You can compare and merge any combination of role types. For example, you can compare the properties of a business role and a department, take the properties you want from them and merge them. This function is available in the **My Responsibilities** menu for your responsibilities.

NOTE: You can only compare and merge roles that you own or you are their administrator.

To compare and merge roles

1. Perform one of the following tasks:
 - Open **Business Roles** and select a business role.
 - Open the **System Roles** menu and select a system role.
 - Open **Department** and select a department.
 - Open **Cost Center** and select a cost center.
 - Open **Locations** and select a location.
2. Select **Compare and merge**.
This opens a dialog. **Select a comparison role.**
3. Select a second role in **Comparison role** and merge using **Assign** next to **Comparison role**.

NOTE: If a role is already selected, use **Change** to edit the selection.

Memberships and entitlements of the selected roles containing the following information are listed:

Table 57: Overview of the selected roles' assignments

Column	Description
Object	Display name of the assigned entitlement or membership, which occurs in one of the selected roles.
Type	Type of the entitlement or membership.
Name of the source role	Assignment type if the entitlement or membership. The following assignment types are available. <ul style="list-style-type: none">• Direct• Inherited• Requested• Dynamic• Not assigned For more detailed information about "Basics for Assigning Company Resources", see the One Identity Manager Identity Management Base Module Administration Guide.
Name of the second role	See "Name of the source role".
Comparison	Name of the role with this assignment.

4. View the assignments of both roles and click **Merge the selected roles**.

NOTE: Use the filter function, which is available on nearly every column, to make the list of assignments clearer. For more information, see [Filter](#) on page 36.

The **Verify** view is active. This lists the actions that need to run to merge the roles.

5. Verify the suggested changes and enable/disable the actions, which should be either taken or not taken into account when the roles are merged.

6. Click **Next**.

Save changes to the script. This opens the **Results** view.

7. Close the **Compare and Merge** dialog.

If you have transferred all the properties of the second role by merging, this role is removed from the overview.

Restoring a previous state



In the **History** view you can roll back the current state of a business role to a state it has had in the past. In the process, you decide yourself which attributes to change. After selecting the business role, all attributes are displayed. These attributes can all be rolled back, with a few exceptions, to a historical state.

In the following table, reasons are listed that prevent roll back to a historical state.

Table 58: Factors preventing roll back

Factor	Description
Attribute was not changed.	Change is not possible without a comparative value.
Membership resulting from delegation.	These memberships are not reset.
Inherited membership	These memberships cannot be deleted.
Membership resulting from a dynamic group.	These memberships cannot be deleted.

To roll back the state of a business role to a historical state

1. Open **Business Roles** and select a business role.
2. Select the **Status comparison** view under **History**.
3. Use  and  to set the date and time.

All the attributes for this business role are displayed in a list. These include business role properties, memberships, actions, amongst others. By default, all attributes are selected.

| NOTE: If you cannot select an attribute, the check box is not set.

4. Disable the **Roll back** check box and set each attribute you want to roll back, separately.
5. Confirm with **Roll back changes**.

The selected attributes are displayed in the **Roll back changes** dialog. You can still change your choice by disabling enabled attributes.

There are other actions available in the context menu **View settings**, which are listed in the following table.

Table 59: Items in the menu "View Settings"

Menu item	Description
Reset view	Sets the view back to default after you have, for example, applied a filter.
Save current view	Save the current view to using with filters, for example.
Reload data	Reloads the data.

6. Roll the selected business role attributes back to their historical state with **Roll back**.

Compliance reports

Details is available **My Responsibilities**. In this view, you can make an initial selection to obtain a thematic detail view.

- Risk indexes and entitlements
Shows all primary and secondary assigned member of the object type or the company structure. The member's assigned entitlements and risk indexes are displayed in the same way.
- Policy violations
Shows all current policy violations found for the object type or the company structure.
- Compliance rule violations
Shows all the member's current rule violations found for the object type or the company structure. Here you can resolve rule violations for marked violations. For more information, see [Resolving rule violations](#) on page 127.

To view details about an object type

1. Perform one of the following tasks:
 - Open **Business Roles** and select a business role.
 - Open **Department** and select a department.
 - Open **Cost Center** and select a cost center.
 - Open **Locations** and select a location.

2. Select **Compliance reports** and make an initial selection to obtain a thematic detail view.

Attestations

In **My Responsibilities**, you can view the attestation status for your responsibilities.

In **Attestations**, you can switch between the following views. Which view you see depends on the selected objects type or company structure.

- Memberships
- Entitlements of members
- Permissions
- All attestation cases

For each case you can see the current status and the creation date in the detailed content view. You can run the following action or get information.

- See whether the case was approved or denied.
- Obtain detailed information about the selected attestation case from the **Information**, **Workflow**, **Attestation policy**, and **History** tabs.
- As attestor, you can view attestors for pending attestation cases.
- Send a reminder.

To view attestations of the desired area of responsibility

1. Perform one of the following tasks:
 - Open **Business Roles** and select a business role.
 - Open the **System Roles** menu and select a system role.
 - Open **Department** and select a department.
 - Open **Cost Center** and select a cost center.
 - Open **Locations** and select a location.
 - Open **Resources** and select a resource.
 - Open **Assignment resources** and select a resource.
 - Open **Multi-request resources** and select a resource.
 - Open **Multi requestable/unsubscribable resources** and select a resource.
 - Open the **Software** menu and select a software application.
2. Select **Attestations**.

Detailed information about this topic

- [Viewing details](#) on page 102
- [Attesting pending attestations](#) on page 102
- [Sending reminders](#) on page 103

Statistics

You can view statistics for the business roles, system roles and system entitlements that you manage.

To view statistics

1. Perform one of the following tasks.
 - a. Open **Business Roles** and select a business role.
 - b. Open the **System Roles** menu and select a system role.
 - c. Open **System entitlements** and select the required system entitlement.
2. Select **Statistics**.

Detailed information about this topic

- [Discovering your statistics on the start page](#) on page 253
- [Statistics](#) on page 253

System roles

NOTE: This function is only available if the module Business Roles Module or System Roles Module is installed.

Using system roles, you can group together arbitrary company resources. You can assign these system roles to employees, workdesks, or roles or you can request them through the IT Shop. Employees and workdesks inherit company resources assigned to the system roles.

System roles are not dependent on the tasks the employee performs. The roles that appear on this list are roles that you are responsible for administering.

For each system role you own, you may be able to:

- View information about the system role, members, and entitlements, risk assessment and rule violations, attestation cases, and usage of various role classes.
- Change the properties of a system role.
- Add members to the role.

- Add entitlements to the role.
- View statistics.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "System Roles" menu

- Open **Responsibilities | My Responsibilities** and click **System Roles**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [New business roles](#) on page 165
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Compliance](#) on page 179
- [Master data](#) on page 166
- [Attestations](#) on page 160
- [Adding entitlements](#) on page 168
- [Deleting entitlements](#) on page 168
- [Splitting a role](#) on page 169
- [Viewing risk indexes](#) on page 148
- [Splitting a role](#) on page 169
- [Compare and merge](#) on page 172
- [History](#) on page 151
- [Timeline](#) on page 152
- [Status comparison](#) on page 153
- [Usage](#) on page 162
- [Statistics](#) on page 177

New system role

You can add new system roles in the **System Roles** menu. To do this, you enter the master data.

To add a new system role

1. Open **System roles** and click **New system role**.
2. Configure the following settings in **New system role** and click **Save**.

NOTE: Any fields that are not marked with an asterisk (*) are optional. Optional fields can be filled in when you create the application or at a later stage.

Table 60: New system role master data

Setting	Description
System role	Field for the system role name.
Display name	Field for the display name.
Internal product name	Field for the internal product name.
System role type	Menu for selecting the system role type.
Service item	Link for selecting a new requestable product.
System role manager	Link for selecting a user as manager. By default, the logged in user is assigned as the manager.
Comment	Field for tips and information.
IT Shop	If set, the system role is available through the IT Shop. The system role can also be assigned directly to employees and hierarchical roles.
Only for use in IT Shop	If set, the system role is available through the IT Shop. The system role may not be assigned directly to hierarchical roles.

Compliance

In the **My Responsibilities** menu, you can view the system role compliance rule violations for which you are responsible.

To view compliance rule violations

1. Open the **System Roles** menu and select a system role.
2. Click **Compliance**.

This displays the **Compliance** view. If rule violations exist, they are listed.

The following information appears:

Table 61: The "Compliance" view

Columns	Description
Permission	Name of permissions that caused the rule violation.

Columns	Description
Rule	Name of the rule that caused the rule violation.
Risk index	Shows the calculated risk index.
Risk index (reduced)	Shows the risk index reduced by the mitigating control.

In the main content view, other details about the marked compliance rule violations are displayed, such as, a description and the object class.

Departments

Departments, cost centers and locations are organizations that part of your management scope.

After you have opened the **Departments** menu, you will see a list of all the departments and sub-departments that you manage. You can run the following tasks:

- View an overview of detailed information about the organization (in a Hyper View), its members and entitlements, attestation cases, usage of the different role classes, risk analysis and historical changes to memberships and entitlements.
- Add members to the role.
- Add entitlements to the role.
- View statistics.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "Departments" menu.

- Open the menu **Responsibilities | My Responsibilities** and click **Departments**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Restoring deleted roles](#) on page 236
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Adding entitlements](#) on page 168
- [Deleting entitlements](#) on page 168
- [Splitting a role](#) on page 169
- [Viewing risk indexes](#) on page 148

- [Splitting a role](#) on page 169
- [Compare and merge](#) on page 172
- [History](#) on page 151
- [Timeline](#) on page 152
- [Status comparison](#) on page 153
- [Comparing the status of company resources](#) on page 181
- [Usage](#) on page 162
- [Compliance reports](#) on page 175
- [Attestations](#) on page 176
- [Statistics](#) on page 181



Comparing the status of company resources

You can compare the current status of a company resource with their status in the past in the **History** view. This compares attributes which have changed within a specified time period. You specify the time period yourself in the date field provided.

As well as comparing a company resource's status, you can also compare an employee's status. For more information, see [Comparing an employee's status](#) on page 155.

The following step-by-step instructions show you how to compare statuses of an company resource using the example of a **Location** object type.

To compare the status of a company resource

1. Open **Locations** and select a location.
2. Select the **Status comparison** view under **History**.
3. Use  and  to set the date and time.

All the attributes for this employee are displayed in a list. By default, all attributes are selected.

Statistics

You can view statistics for the departments that you manage.

To view statistics

1. Open **Departments** and select a department.
2. Select **Statistics**.

Detailed information about this topic

- [Discovering your statistics on the start page](#) on page 253
- [Statistics](#) on page 253

Cost centers

Departments, cost centers and locations are organizations that part of your management scope.

After opening **Cost centers**, you will see a list of all the cost centers and subordinate cost centers that you manage. You can run the following tasks:

- View an overview of detailed information about the organization (in a hyper view), its members and entitlements, attestation cases, usage of different role classes, risk analysis and historical changes to memberships and entitlements
- Request members
- Add entitlements
- Viewing statistics

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To manage cost centers

- Open the **Responsibilities | My Responsibilities** menu and click **Cost centers**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Restoring deleted roles](#) on page 236
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Adding entitlements](#) on page 168
- [Deleting entitlements](#) on page 168
- [Splitting a role](#) on page 169
- [Viewing risk indexes](#) on page 148
- [Splitting a role](#) on page 169
- [Compare and merge](#) on page 172
- [History](#) on page 151
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- [Status comparison](#) on page 153
- [Comparing the status of company resources](#) on page 181
- [Usage](#) on page 162
- [Compliance reports](#) on page 175
- [Attestations](#) on page 176
- [Statistics](#) on page 184

Statistics

You can view statistics for the cost centers that you manage.

To view statistics

1. Open **Cost Center** and select a cost center.
2. Select **Statistics**.

Detailed information about this topic

- [Discovering your statistics on the start page](#) on page 253
- [Statistics](#) on page 253

Locations

Departments, cost centers and locations are organizations that part of your management scope.

After you open **Locations**, you will see a list of all the locations and sub-locations that you manage. You can run the following tasks:

- View an overview of detailed information about the organization (in a Hyper View), its members and entitlements, attestation cases, usage of the different role classes, risk analysis and historical changes to memberships and entitlements.
- Add members to the role.
- Add entitlements to the role.
- View statistics.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To manage locations

- Open **Responsibilities | My Responsibilities** and click **Locations**.

Detailed information about this topic

- [Restoring deleted roles](#) on page 236
- [Displaying information](#) on page 144
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
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- [Compare and merge](#) on page 172
- [Statistics](#) on page 184

Statistics

You can view statistics for the cost centers that you manage.

To view statistics

1. Open **Cost Center** and select a cost center.
2. Select **Statistics**.

Detailed information about this topic

- [Discovering your statistics on the start page](#) on page 253
- [Statistics](#) on page 253

Application roles

Open the **One Identity Manager application roles** page by selecting the **Responsibilities | My Responsibilities | One Identity Manager application role**.

Use application roles to quickly and simply assign to employees entitlement profiles that match their tasks and functions. One Identity Manager already supplies a number of default application roles. You can also [create](#) custom application roles to suit your own needs.

On the **One Identity Manager application roles** page, you can view the application roles that you own. Select an application role to view more details.

After you have selected an application role, you can view more information about it on other pages.

Table 62: Application roles

Page	Description
Overview	<p>Shows all the information at a glance. You can view more, interesting information by clicking on the links inside a shape.</p> <p>For more information, see Displaying information about application roles on page 186.</p>
Master data	<p>Shows the application role's master data and gives you the option to edit it.</p> <p>For more information, see Master data of application roles on page 187.</p>
Memberships	<p>Shows the employee that the application role is assigned to. You can also add members (request membership) and delete existing memberships.</p> <p>For more information, see Membership in application roles on page 189.</p>
Permissions	<p>Shows an overview of entitlements assigned to the application role.</p> <p>For more information, see Application role entitlements on page 191.</p>
Attestations	<p>Here you can manage the current attestation cases of the attestation role.</p> <p>You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.</p> <p>For more information, see Attesting application roles on page 193.</p>
History	<p>Shows all the changes made to the application role.</p>

Page	Description
	For more information, see Application role history on page 197.
Usage	Shows which roles belong to members of the application role. For more information, see Role memberships of application role members on page 200.
Compliance reports	Shows compliance reports about the application role. For more information, see Compliance reports of application roles on page 201.

Creating application roles

You can create new application roles to suit your requirements at anytime. Use the functions described in [Application roles](#) on page 185 to assign properties to application roles (for example, memberships, entitlements).

To create an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, click **New application role**.
4. On the **Create a new application role** page, enter the application role's master data. For more information, see [Master data of application roles](#) on page 187.
5. Click **Save**.

Related topics

- [Application roles](#) on page 185
- [Master data of application roles](#) on page 187

Displaying information about application roles

You can view a summary of all relevant information about an application role that you own, in an overview. This information is displayed as shapes.

To display an overview of an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, click the application role you want to view.
4. On the **<application role name>(application role)**, click the **Overview** tile.

Related topics

- [Application roles](#) on page 185

Master data of application roles

Navigate to the **Master data** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Master data**. For more information, see [Displaying and editing application role master data](#) on page 188.

Depending on your responsibilities and entitlements, it may be possible to change the properties of application roles that you are responsible for. For example, you can change the name of an application role so that it has more meaning and is therefore, easier to use.

On the **Master data** page, you can find the following data and edit it.

Table 63: Application role master data

Setting	Description
Application role	Specifies the name of the application role. Use a meaningful name so that the application role can be applied or utilized in the correct context.
Internal name	Specify the application role's internal name.
Parent application role	Specifies the application role under which the application role is organized. To open the associated overview, click on the application role shown.
Manager	Specifies the manager responsible for the application role. To change the application role's manager, click change and select a new manager.
Deputy manager	Specifies the employee who deputizes for the application role. To specify or change the application role's deputy, click Assign (no deputy assigned yet) or change respectively and select a deputy.

Setting	Description
Description	Specifies a description for the application role. Enter a meaningful description that exactly described what the application role is used for.
Comment	Specifies additional advice and information about the application role.
Full name	Shows the full name of the application role (including path).
Department	Specifies which department the application role belongs to. To specify or change the application role's department, click Assign (no department assigned yet) or Change and select a department.
Location	Specifies which location the application role belongs to. To specify or change the application role's location, click Assign (no location assigned yet) or Change and select a location.
Cost center	Specifies which cost center the application role belongs to. To specify or change the application role's cost center, click Assign (no cost center assigned yet) or Change and select a cost center.

Related topics

- [Application roles](#) on page 185
- [Displaying and editing application role master data](#) on page 188

Displaying and editing application role master data

Use the master data described in [Master data of application roles](#) on page 187 to show and edit application roles.

To show and edit an application role's master data

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role you want to edit.
4. On the **<application role name> (Application role)** page, click the **Master data** tile.
5. On the **Master data - <application role name>** page, make the any changes to the data as necessary. For more information, see [Master data of application roles](#) on page 187.
6. Click **Save**.

Related topics

- [Application roles](#) on page 185
- [Master data of application roles](#) on page 187

Membership in application roles

Navigate to the **Memberships** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Memberships**. For more information, see [Displaying members of application roles](#) on page 189.

You can assign memberships to application roles by requesting membership in the application role for a specified employee. You can only request membership in application roles that you manage and for which you own the necessary entitlements.

On the **Memberships** page, you will see a list of memberships that are assigned to an application role managed by you.

The following tables give you an overview of the different functions of the **Memberships** page.

Table 64: Membership in an application role

Column	Description
Employees	Shows the employee's name.
Origin	Show how the employee obtained membership in the application role.

Table 65: Controls

Control	Description
Request memberships	Use this button to add employees to the application role.
Deleting memberships	Use this button to remove employees from the application role.

Related topics

- [Application roles](#) on page 185
- [Displaying members of application roles](#) on page 189
- [Adding members to application roles](#) on page 190
- [Removing members from application roles](#) on page 191

Displaying members of application roles.

You can display members assigned to an application role at any time.

To show members of an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose members you want to show.
4. On the **<application role name> (Application role)** page, click the **Memberships** tile.

This opens the **Memberships** page. For more information, see [Membership in application roles](#) on page 189.

Related topics

- [Application roles](#) on page 185
- [Membership in application roles](#) on page 189
- [Adding members to application roles](#) on page 190
- [Removing members from application roles](#) on page 191

Adding members to application roles

You can assign memberships to application roles by requesting membership in the application role for a specified employee.

To request membership of an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role you want to request membership for.
4. On the **<application role name> (Application role)** page, click the **Memberships** tile.
5. On the **Memberships - <application role name>** page, click **Request memberships**.
6. In the **Request memberships** dialog, select the employee you want to request membership for. You can select multiple employees.
7. Click **Add to cart**.

This opens the **My Shopping Cart** page. For more information, see [Making requests](#) on page 60.

Related topics

- [Application roles](#) on page 185
- [Membership in application roles](#) on page 189
- [Displaying members of application roles.](#) on page 189
- [Removing members from application roles](#) on page 191
- [Making requests](#) on page 60

Removing members from application roles

You can delete employee membership of assigned application roles.

To delete memberships of application roles

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role you want to delete the membership from.
4. On the **<application role name> (Application role)** page, click the **Memberships** tile.
5. On the **Memberships - <application role name>** page, check the box next to the employee whose membership you want to delete. You can select multiple employees.
6. Click **Delete memberships**.

Related topics

- [Application roles](#) on page 185
- [Membership in application roles](#) on page 189
- [Displaying members of application roles.](#) on page 189
- [Adding members to application roles](#) on page 190

Application role entitlements

Navigate to the **Entitlements** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Entitlements**. For more information, see [Displaying entitlements of application roles](#) on page 192.

Employees can be assigned entitlements to different objects, such as, groups, accounts, role, or applications. Assigning employees to application roles avoids you having to assign entitlements separately to each employee. All entitlements of the application role are automatically assigned to all the members of the application role. For more information

about application roles, see the *One Identity Manager Authorization and Authentication Guide*.

On the **Entitlements** page, you will see a list of entitlements that are assigned to an application role managed by you.

The following tables give you an overview of the different functions of the **Entitlements** page.

Table 66: Application role entitlements

Column	Description
Entitlement	Shows the entitlement's name.
Origin	Shows where the entitlement originated from.
Entitlement type	Show the type of entitlement (subscribed reports, account definitions, resources).

Related topics

- [Application roles](#) on page 185
- [Displaying entitlements of application roles](#) on page 192

Displaying entitlements of application roles

You can display entitlements of an application role at any time.

To show entitlements of an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application role** page, in the list, select an application role to show its entitlements.
4. On the **<application role name> (application role)** page, click the **Entitlements** tile.

This opens the **Entitlements** page. For more information, see [Application role entitlements](#) on page 191.

Related topics

- [Application roles](#) on page 185
- [Application role entitlements](#) on page 191

Attesting application roles

Navigate to the **Attestation** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Attestation**. For more information, see [Displaying attestation cases of application roles](#) on page 194.

Attestation helps you to ensure the correct balance between security and compliance within the company. Attestation policies define what and whom to attest. Attestation policies are run on a schedule, and generate attestation cases. For example, having a manager attest to the groups his employees belong to provides accountability if security breaches are found.

On the **Attestation** page, you can view and edit all the attestation cases that relate to application role.

The attestation cases are divided in to the different categories to provide a clearer overview:

- **Memberships:** Shows all the attestation cases that relate to application role members.
- **Entitlements:** Shows all the attestation cases that relate to entitlements of application role members.
- **Object attestation:** Shows all the attestation cases that relate to the selected application role.
- **All attestation cases:** Shows all the attestation cases.

The following tables give you an overview of the different functions on the **Attestation** page.

Table 67: Application role attestation

Column	Description
Display name	Show the name of the application role the attestation case relates to.
Attestation policy	Show that name of the attestation policy in use.
Status	Shows whether an approval decision has already been made for the attestation case.
New	Show you whether this is a new attestation case.
Due date	Show the date by which an approval decision must be made for the attestation case.
Risk index	Shows the importance of the attestation case.

Table 68: Controls

Control	Description
View approvers for pending cases	Use this button to view all employees that still have to make approval decisions about attestation cases. At this point, you can also send special reminder mails to these employees.
Send reminder	Use this button to send a reminder email to all the employee that still have to make approval decisions about attestation cases.
Approve	Use this button to open the Pending attestations: One Identity Manager application roles page. At this point, you make your approval decisions about the application roles' attestation cases.

Related topics

- [Application roles](#) on page 185
- [Displaying attestation cases of application roles](#) on page 194
- [Displaying attestators for pending attestation cases of application roles and sending reminders](#) on page 195
- [Approving attestation cases of application roles.](#) on page 195

Displaying attestation cases of application roles

You can display application role attestation cases at any time.

To show application role attestation cases

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose attestation cases you want to show.
4. On the **<application role name> (Application role)**, click the **Attestation** tile.
This opens the **Attestation** page. For more information, see [Attesting application roles](#) on page 193.

Related topics

- [Application roles](#) on page 185
- [Attesting application roles](#) on page 193
- [Displaying attestators for pending attestation cases of application roles and sending reminders](#) on page 195
- [Approving attestation cases of application roles.](#) on page 195

Displaying attestators for pending attestation cases of application roles and sending reminders

You can display attestators for pending attestation cases of application roles at any time and send reminder emails.

To show attestators for pending attestation cases of application roles and send them reminder emails

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose attestation cases you want to show.
4. On the **<application role name> (Application role)**, click the **Attestation** tile.
5. (Optional) Depending which attestation case you want to display, change to the corresponding tab.
6. Click **View approvers for pending cases**.
7. In the **Send reminder mail** dialog, click in the **Send reminder** in the row of the employee you want to send the reminder to.

To send reminder emails

1. Run the previous steps 1 - 5.
2. On the **<application role name> (Application role)** page, click **Send reminder**.
3. In the **Send reminder mail** dialog, in the **custom message** field, enter a message for the attestor.
4. Click **OK**.

Related topics

- [Application roles](#) on page 185
- [Attesting application roles](#) on page 193
- [Displaying attestation cases of application roles](#) on page 194
- [Approving attestation cases of application roles](#) on page 195

Approving attestation cases of application roles.

You can make approval decisions about attestation cases of application roles.

To grant or deny approval to attestation cases of application roles.

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose attestation cases you want to show.
4. On the **<application role name> (Application role)**, click the **Attestation** tile.
5. Select **Approve**.
6. On the **Pending attestations: One Identity Manager application roles** page, click the application role you want to approve.
7. On the **Pending attestations: <application role name>** page, perform one of the following actions:
 - a. Grant approval by clicking ☒ **Approve** next to the attestation case.
 - b. Deny approval by clicking ☐ **Deny** next to the attestation case.
8. Click **Next**.
9. (Optional) On the **Pending attestations** page, perform one of the following actions:
 - In the **Reason for approvals** field, enter a reason for your approval decision.

NOTE: If you have made several approval decisions, the reason you enter here applies to them all.
 - In the **Standard reason** field, select a predefined reason.

NOTE: If you have made several approval decisions, the reason you enter or select here applies to them all.

NOTE: You have the option of selecting a predefined text for all cases still to be approved using the **Standard reason** menu. Standard reasons are displayed in the approval history and in the case details. For more detailed information about default reasons, see the *One Identity Manager Attestation Administration Guide*.
 - If you have made several approval decisions and want to provide separate reasons for each, click **Enter a reason**. in the list next to the approval, enter a reason in the **Approval reasons** field or select a **Standard reason** from the list of reason and lick **Close**.
10. Click **Save**.
11. In the **Pending attestation cases** dialog, confirm the prompt with **Yes**.
12. If the attestation policy requires multi-factor authentication, you are prompted to enter a security code. It may take a few minutes for the prompt to be displayed. Perform one of the following tasks:
 - Click **Authenticate with Starling 2FA app**.
 - Click **Send SMS** or **Phone call** and enter the security code. Click **Next**.

For more information, see [Requesting a Starling 2FA token](#) on page 79.

Related topics

- [Application roles](#) on page 185
- [Attesting application roles](#) on page 193
- [Displaying attestation cases of application roles](#) on page 194
- [Displaying attestators for pending attestation cases of application roles and sending reminders](#) on page 195

Application role history

Navigate to the **History** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | History**. For more information, see [Displaying application role history](#) on page 198.

On the **History** page, you can view all modifications to the application roles that you manage. The information is divided out on to three tabs:

- **Events:** Shows all the events, which affect an application role, on either a timeline or in a table.
- **Status overview:** Shows a list of modified properties with the validity time period and corresponding date of change.
- **Status comparison:** Shows a comparison between the current and the selected point in time.

The following tables give you an overview of the different functions on the **History** page.

Table 69: History of an application role

Tabs	Column	Description
Events		
	Change type	Shows the type of change.
	Property	Shows the type of the modified object.
	Display	Shows the name of the modified object.
	Date	Shows the date the change was made.
	User	Shows the user that made the change.
Status overview		
	Display	Shows the type of change.

Tabs	Column	Description
	Property	Shows the type of the modified object.
	Value	Shows the name of the modified object.
	Run started	Shows the start date of the validity period.
	End	Shows the end date of the validity period.
Status comparison		
	Modified	Show whether the change took place or not.
	Change type	Shows the type of change.
	Object type	Shows the type of the modified object.
	Property	Shows the name of the modified object.
	Historical value	Shows the value before the modification.
	Current value	Show the current value.

Related topics

- [Application roles](#) on page 185
- [Displaying application role history](#) on page 198

Displaying application role history

You can view the history of an application role at any time.

To show the history of an application role

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose risk index you want to show.
4. On the **<application role name> (Application role)**, click the **History** tile.

This opens the **History** page and displays the timeline. For more information, see [Application role history](#) on page 197.

TIP: To navigate along the timeline, click in the pane and move the mouse left or right whilst holding down the left button.

To zoom in or out, turn the mouse wheel.

To filter the timeline by a particular event

1. On the **History** page, click **Filter by...** and select one of the following entries:

Filter	Description
User	Searches for events or actions associated with the given name. Employees with entitlements and ownerships create changes, such as adding or removing properties. You can view these actions on the timeline.
Change type	Lists all changes types, which can be selected for displaying in the timeline. Multi-select is possible.
Date	List all actions and events for the selected date.
Property	Lists all properties, which can be selected for displaying in the timeline. Multi-select is possible.
Display	Searches for all text data matching the given search term. The following settings are available. <ul style="list-style-type: none">• All words• Starts with...• Ends with...• One or more words

2. Apply the selected filter with **Filter on**.

To display the history as a table

- On the **History** page, click **Switch to table view**.

TIP: If you want to switch back to the timeline view, click **Switch to timeline view**.

To display a list of modified properties with their validity period and dates when they were changed.

- On the **History** page, switch to the **Status overview** tab.

To compare the current status of an object with a date in the past

1. On the **History** page, switch to the **Status comparison** tab.
2. On the **Status comparison** tab, enter the start date of the comparison.

Related topics

- [Application roles](#) on page 185
- [Application role history](#) on page 197

Role memberships of application role members

Navigate to the **Usage** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Usage**. For more information, see [Displaying role memberships](#) on page 200.

On the **Usage** page, you can view which roles belongs to the members of application roles that you manage. The information is displayed as a hierarchical chart, which shows you more about the role inheritance.

The following tables give you an overview of the different functions on the **Usage** page.

Table 70: Controls

Control	Description
Role classes	Use this list of roles to select what you want to view .
More information	Use this button to show the legend that explains the content of the overview.

Related topics

- [Application roles](#) on page 185
- [Displaying role memberships](#) on page 200

Displaying role memberships

You can display which role belong to members of an application role.

To show usage of application roles

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application roles** tile.
3. On the **One Identity Manager application roles** page, in the list, select the application role whose usage you want to show.
4. On the **<application role name> (Application role)**, click the **Usage** tile.
5. On the **Usage - <application role name> (Application role)**, in the **Role classes** list, select the main category of the role you want to show.

This displays the role class overview.

TIP: To show the legend that explains the content of the overview, click **More information**.

6. (Optional) In the overview, click on an object to show the sub-objects.

Related topics

- [Application roles](#) on page 185
- [Role memberships of application role members](#) on page 200

Compliance reports of application roles

Navigate to the **Compliance reports** page through **Responsibilities | My Responsibilities | One Identity Manager application roles | <application role> | Compliance reports**. For more information, see [Displaying compliance reports of application roles](#) on page 202.

On the **Compliance reports** page, you can view compliance reports of application roles that you manage. The data is divided between three menus:

- **Policy violations:** Shows all current rule violations that have been caused by the application role.
- **Compliance rule violations:** Shows all the current rule violations of application role members.
TIP: For more information about resolving rule violations, see [Resolving rule violations](#) on page 127.
- **Members: Risk indexes and entitlements:** Shows all primary and secondary assigned members of the application role. The member's assigned entitlements and risk indexes are displayed in the same way.

Use the **View** list to open the menus.

The following tables give you an overview of the different functions on the **Compliance reports** page.

Table 71: Compliance reports of an application role

Menu	Column	Description
Policy violations		
	Violating object	Show which object caused the rule violation.
	Policy	Show the policy that was violated.
	Status	Show the status of the rule policy.

Compliance rule violations

Menu	Column	Description
	Employee	Shows the employee who caused the violation.
	Rule violation	Shows the violated rule.
	Approval state	Shows how or whether approval is granted to the rule violation.
	Risk index (reduced)	Shows the risk index taking mitigating controls into account. A rule's risk index can be reduced by a significance amount after mitigating controls have been applied. Mitigating controls are processes that exist outside the One Identity Manager solution and that reduce the risk of violation. For more information, see Governance administration on page 132.
Members: Risk indexes and entitlements		
	Employee	Show the employees who are assigned to the application role.
	Risk index (calculated)	Shows you the employee's calculated risk index.
	Assigned permissions	Shows all the entitlements assigned to this employee.

Related topics

- [Application roles](#) on page 185
- [Displaying compliance reports of application roles](#) on page 202
- [Resolving rule violations](#) on page 127
- [Governance administration](#) on page 132

Displaying compliance reports of application roles

You can view an application role's compliance reports at any time.

To displaying compliance reports of application roles

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **My Responsibilities** page, click the **One Identity Manager application**

roles tile.

3. On the **One Identity Manager application roles** page, in the list, select the application role whose compliance reports you want to show.
 4. On the **<application role name> (Application role)**, click the **Compliance reports** tile.
 5. On the **Compliance reports** page, in the **View** list, select one of the following entries:
 - **Policy violations:** Shows all current rule violations that have been caused by the application role.
 - **Compliance rule violations:** Shows all the current rule violations of application role members.
- | **TIP:** For more information, see [Resolving rule violations](#) on page 127.
- **Members: Risk indexes and entitlements:** Shows all primary and secondary assigned members of the object type or the company structure. The member's assigned entitlements and risk indexes are displayed in the same way.

For more information, see [Compliance reports of application roles](#) on page 201.

Related topics

- [Application roles](#) on page 185
- [Compliance reports of application roles](#) on page 201
- [Resolving rule violations](#) on page 127

Resources

In the **Resources** menu, you can view the resources that you manage. An employee can own resources once and they can only be requested by them once. After being approved, they remain assigned until they are unsubscribed. You can request them again a later point. Examples for resource are telephones or company cars.

You can execute the following actions for each resource:

- View overview pages about a resource (Hyper View) with all the required details, like assigned service items, memberships, and their usage.
- Change resource properties.
- Add new resources and applications.
- Add employees to a resource.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To open the "Resources" menu

- Open the menu **Responsibilities | My Responsibilities** and click **Resources**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [New resources](#) on page 204
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Attestations](#) on page 176
- [Usage](#) on page 162

New resources

In the **Resources** menu, you can add new resources. To do this, you enter the master data.

To add a new resource

1. Open **Resources** and click **New resource**.
2. Configure the following settings for the new resource and click **Save**.

Table 72: Settings and data for new resources

Setting	Description
Resource	Field for naming the resource.
Resource type	Link for selecting the resource type.
Description	Field for entering a reason for the new resource.
IT Shop	If set, the resource is available through the Web Portal. The resource can still be assigned directly to employees and hierarchical roles.
Only for use in IT Shop	If set, the resource is only available through the Web Portal. The resource may not be assigned directly to hierarchical roles.
Service item	Link for selecting a new requestable product.

Assignment resources

On the **Assignment resources** page, you can view all the assignment resources that you manage. Use assignment resources to request hierarchical roles, such as departments or business roles and assign them to employees, devices, and workdesks. This means, for example, you can limit assignment resources to a certain business roles, which makes it unnecessary to select the business role additionally when you request an assignment resource. It is automatically a part of the assignment request. Assignment resources are available for requesting in the shop "Identity & Access Lifecycle". For more information about assignment resources, see the One Identity Manager Business Roles Administration Guide and One Identity Manager IT Shop Administration Guide.

You can execute the following actions for each resource:

- View overview pages about a resource (hyper view) with all the required details, like assigned service items, memberships, and their usage.
- Change the assignment resource properties

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To display the assignment resources that you manage

1. In the menu bar, click **Responsibilities | My Responsibilities**.
2. On the **Auditing** page, click the **Assignment resources** tile.

TIP: You can view all assignment resources or assignment resources assigned to other employees. For more information, see [Assignment resources](#) on page 233.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Attestations](#) on page 176
- [Usage](#) on page 162

Multi-request resources

In **My Responsibilities**, you can see the resources that you have requested in IT Shop more than once. Multi-requestable resources are automatically unsubscribed after the request has been granted approval. These resources are not explicitly assigned to the employee. Examples include consumables such as pens or printing paper.

To open "Multi-requestable/unsubscribable resources"

- Open **Responsibilities | My Responsibilities** and click **Multi-request resources**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Attestations](#) on page 176
- [Usage](#) on page 162

Multi-requestable/unsubscribable resources

In the menu, **Multi-requestable/unsubscribable Resources**, you can view all the resources that you manage. You can request multi-requestable/unsubscribable resources more than once in the IT Shop. These resources must, however, be returned explicitly when they are no longer required. They are assigned to employees after approval has been granted and They remain assigned until the request is canceled. An example of multi-requestable/unsubscribable resources would be printers or monitors.

You can execute the following actions for each resource:

- View overview pages about a resource (Hyper View) with all the required details, such as assigned service items, memberships, and their usage.
- Change resource properties.
- Add new resources and applications.
- Add employees to a resource.

Some functions have already been described in other menus. You can find all the functions available in this menu listed under "Detailed information about this topic".

To manage multi-requestable/unsubscribable resources

- Open the **Responsibilities | My Responsibilities** and click **Multi-requestable/unsubscribable resources**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Attestations](#) on page 176
- [Usage](#) on page 162

Software

In the **Software** menu, you only see the software applications that you are responsible for.

You can assign software directly or indirectly to employees. Indirect assignment is carried out by allocating employees and software in company structures, like departments, cost centers, locations, or business roles. Examples of software that can be assigned are: internet, address management, email or text editing software.

Detailed information about this topic

- [Adding new software](#) on page 207
- [Displaying information](#) on page 144
- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Attestations](#) on page 176
- [Usage](#) on page 162

Adding new software

In the **Software** menu, add new software. To do this, you enter the master data.

To add a new software application

1. Open the **Software** menu and click **New software**.
2. Configure the following settings for the new software application and click **Save**.

NOTE: Any fields that are not marked with an asterisk (*) are optional. Optional fields can be filled in when you create the application or at a later stage.

Table 73: Setting and data for new software

Setting	Description
Name of the software *	Input field for the software application name. Enter the name of the software application.
Version *	Software application version.
Language	Language settings. The selected language is used in the software application. Use Assign to select the language.

Setting	Description
Service item	<p>If you assign a service item to the software application, usage of the software application can be booked internally.</p> <p>Make a new service item using Create a new service item.</p> <p>Enter the data about the service category and product owner for the new service item in New service item.</p>
Internal product name	Software application name used internally.
Website	The software application's website.
Link to documentation	Link to the software application's documentation.
Description	Field for additional explanations.
Comment	Field for additional explanations.
IT Shop	If enabled, this option makes the software application available in the IT Shop.
Only for use in IT Shop	<p>This can only be changed if the IT Shop option is set.</p> <p>If enabled, this option makes the software application available only in the IT Shop.</p>
Deactivated	If enabled, this option adds a disabled software application.

Devices

You can view your devices in the **Devices** menu and assign new devices to yourself. If you have sufficient permissions, you can add new devices or make changes to the device assignments for your staff.

To open the "Devices" menu

- Open the menu **Responsibilities | My Responsibilities** and click **Devices**.

Detailed information about this topic

- [Displaying information](#) on page 144
- [Adding new devices](#) on page 209
- [Editing master data](#) on page 211

Adding new devices

You can assign devices to employees in **Devices**.

To add a new device

1. Open the menu **Devices** and click **Add a new device**.
2. In the **Add a new device** view, select the device type from the **Device type** list.
3. In the **Device model** field, assign the required model and click **Next**.

This opens **Add a new device** with more form fields. The type of data input required depends on the type of device. Enter the following data.

Table 74: Device master data

Setting	Description
Used by	Select a future user for the device The current user is selected by default. Use Change to select another user from the list. You can only select another user if you own the required permissions or you have your own staff.
Device model	Select a device model You have already entered this in the 3rd step of these step-by-step instructions. Use Change to select another device model.
Manufacturer	Select a device manufacturer Use Assign to select a manufacturer from the list.
Device ID	Identifier for the device Enter the device's identifier if you know it.
Device status	Select device status Use Assign to select the device's status.
Asset number	Asset number input Enter the asset number if you know it.
Company owned	Checkbox to define the device as belonging to the company Enable the checkbox to define the device as company property.
Location description	Location input Enter the location where the device will be used.

Setting	Description
Serial number	Serial number input Enter the device's serial number, if known.
MAC address	MAC address input Enter the device's MAC address.
Storage capacity [GB] / RAM [MB]	Storage capacity / RAM information input Enter the device's storage capacity / RAM.
BIOS version	BIOS version input Enter the BIOS version if this device is a PC.
Operating system	Name of the operating system input Enter the name of the operating system used by the device.
Operating system version	Operation system's version input Enter the version number of the operating system currently installed on the device.
Carrier <i>(* only displayed for mobile phones or tablets)</i>	Name of the carrier input Enter the name of the carrier to be used with the device.
IMEI <i>(* only displayed for mobile phones or tablets)</i>	International Mobile Station Equipment Identity (IMEI) input Enter the IMEI if the device is a mobile phone.
ICCID <i>(* only displayed for mobile phones or tablets)</i>	Integrated Circuit Card ID (ICCID) input Enter the ICCID number (SIM card number) if the device is a mobile phone.
Phone <i>(* only displayed for mobile phones)</i>	Telephone number input Enter the telephone number, if this device is a mobile phone.
PC / Server / VM host / VM client <i>(* only displayed for personal computers)</i>	Checkbox for enabling Enable the respective checkbox corresponding to the device.
VM Host <i>(* can be edited if the VM client checkbox is enabled).</i>	Menu for VM host Click Assign to select a VM host from the menu.

NOTE: Fields marked with * are compulsory.

4. Save the changes.

Editing master data

In the **Devices** menu, you can edit the master data of devices you already manage. You could assign a tablet to another employee, for example, or change the device's status, the manufacturer or the device model. You can also add any missing information in the master data.

To edit the master data of a managed device

1. In the **Devices** view, click the device to edit.
2. Set the following master data.

Table 75: Device master data

Setting	Description
Used by	Select a future user for the device The current user is selected by default. Use Change to select another user from the list. You can only select another user if you own the required permissions or you have your own staff.
Device model	Select a device model You have already entered this in the 3rd step of these step-by-step instructions. Use Change to select another device model.
Manufacturer	Select a device manufacturer Use Assign to select a manufacturer from the list.
Device ID	Identifier for the device Enter the device's identifier if you know it.
Device status	Select device status Use Assign to select the device's status.
Asset number	Asset number input Enter the asset number if you know it.
Company owned	Checkbox to define the device as belonging to the company Enable the checkbox to define the device as company property.
Location description	Location input

Setting	Description
	Enter the location where the device will be used.
Serial number	Serial number input Enter the device's serial number, if known.
MAC address	MAC address input Enter the device's MAC address.
Storage capacity [GB] / RAM [MB]	Storage capacity / RAM information input Enter the device's storage capacity / RAM.
BIOS version	BIOS version input Enter the BIOS version if this device is a PC.
Operating system	Name of the operating system input Enter the name of the operating system used by the device.
Operating system version	Operation system's version input Enter the version number of the operating system currently installed on the device.
Carrier <i>(* only displayed for mobile phones or tablets)</i>	Name of the carrier input Enter the name of the carrier to be used with the device.
IMEI <i>(* only displayed for mobile phones or tablets)</i>	International Mobile Station Equipment Identity (IMEI) input Enter the IMEI if the device is a mobile phone.
ICCID <i>(* only displayed for mobile phones or tablets)</i>	Integrated Circuit Card ID (ICCID) input Enter the ICCID number (SIM card number) if the device is a mobile phone.
Phone <i>(* only displayed for mobile phones)</i>	Telephone number input Enter the telephone number, if this device is a mobile phone.
PC / Server / VM host / VM client <i>(* only displayed for personal computers)</i>	Checkbox for enabling Enable the respective checkbox corresponding to the device.
VM Host <i>(* can be edited if the VM client checkbox is enabled).</i>	Menu for VM host Click Assign to select the VM host from a list.

3. Save the changes.

Adding tags for service items

You can add tags if you are the product owner and the service item can be requested in the IT Shop. Tags help the requester to find the service item for a request, faster. You can search within the **Request** menu or with the global search in the Web Portal.

Tags can be added in the Manager as well as in the Web Portal. Add tags in the Web Portal as a product owner. For more detailed information, see the One Identity Manager IT Shop Administration Guide.

To add a tag for a service item

1. Open **My Responsibilities** and click a responsibility, for example, **System entitlements**.
2. Select **Overview** and click the object name in the **Service item** shape.
3. Select **Tags** on the object's page and click **New tag**.
4. Enter the new tag and other information about the tag in the **Create a new tag**.
5. Click **Save**.

You can add more tags for the object.

Task delegation

Delegation is a submenu of **Responsibilities**. Here you can delegate your responsibilities and view your delegation history. These actions can be called up over tiles.

Detailed information about this topic

- [Adding new delegations](#) on page 214
- [Deleting delegations](#) on page 215

Delegation

NOTE: This function is only available if the module Identity Management Base Module, Business Roles Module or System Roles Module is installed.

In the **Delegations** menu, you can cancel and delete delegations. All your delegations are listed here. You can cancel and delete approved delegations. These delegations are marked with the **Approved** status.

You can only delete delegations which are not approved. Unapproved delegations have the status **Request** or **Assigned**. The delegation status is displayed in the detailed content view.

You can see the current status and validity, amongst other things, for every single delegation in the detailed content view. You can run the following action or get information.

- You obtain detailed information about the selected delegation on the **Delegation** and **Employee** tabs.
- The **Details** on the **Delegation** tab provide you with an extended version of the delegation information that is divided between the **Information**, **Workflow** and **Compliance** tabs.

To open the "Delegation" menu.

- Open the menu **Responsibilities | Delegation** and click **Delegation**.

Adding new delegations

You can add new delegations it he **Delegation** menu.

To add a new delegation

1. Open **Delegation** and click **New delegation**.

This opens the wizard for delegating role memberships and responsibilities. The **Select a recipient** view is selected.

2. Select a recipient of the delegation with **Assign** and click **Next**.

3. Mark the role you want to delegate in **Select roles** and click **Next**.

Roles that have already been delegated can delegated again. You can also delegate several roles at the same time, as long as you want to delegate them to the same person.

Enter additional information is now visible.

4. Configure the following settings in **Enter additional information** and click **Save**.

Table 76: Additional information for delegation

Setting	Description
Valid from	Start date and time of the delegation.
Valid until	Expiry date and time of the delegation.
Notify me if the recipient of the delegation makes a decision.	If the option is set, you receive a message in this case.

Setting	Description
The recipient can delegate this role	If the option is set, the recipient of the delegation can delegate the role to someone else.
Reason	Field for entering a reason for delegating.
Priority	<p>Menu for selecting a priority.</p> <p>The following priorities are available:</p> <ul style="list-style-type: none"> • Default • High • Medium • Low

Delegations cannot be changed later. If you should want to make a change, you must withdraw the delegation and set up a new one.

Deleting delegations

You delegations are displayed in the **Delegation** menu. You can limit the number of delegations displayed by filtering them. You can apply a filter to the column **Type**, for example. Here you can filter the assignment type by the following:

- Employee manager
- Role manager
- Business owner
- Membership

You can delete single or multiple delegations at the same time. You can also delete all delegations in one just step.

To delete one, several, all visible or your own delegations

1. Open **Delegation**.
2. Use a filter and then mark the item you want in the result list.
3. Perform one of the following tasks.

Table 77: Ways of deleting delegations

Action	Input sequence
Delete a	<ul style="list-style-type: none"> • Highlight the delegation you want to delete and click <input checked="" type="checkbox"/>.

Action	Input sequence
single delegation	<ul style="list-style-type: none"> Repeat this step for each of the delegations you want to delete at the same time.
Delete all visible delegations	<ul style="list-style-type: none"> Highlight all delegations visible in the list and click <input type="checkbox"/>. Click Select all. <p>All delegations visible in the list are marked with <input checked="" type="checkbox"/>.</p> <p>NOTE: Click <input checked="" type="checkbox"/> to deselect the marked delegations. or click <input type="checkbox"/> to individually deselect marked delegations.</p> <p>All visible delegations are deleted from the list. If the filter returns more than one page of results, they are displayed on subsequent pages.</p>
Delete your own delegations	<ul style="list-style-type: none"> Click Delete my delegations.

- Click **Delete delegation** and confirm the prompt with **Yes**.

Delegation history

In the delegation history, you can view all the delegations that you have been issued or have issued yourself.

You will see the name, type, validity of the delegation and to whom it was delegated in the list of delegations.

For each delegation, you can obtain more information on the **Information**, **Workflow**, **Compliance** and **Entitlements** tabs in the detailed content view.

Related topics

- [Displaying delegation history](#) on page 216

Displaying delegation history

To show delegation history

- In the header, select **Responsibilities | Delegation**.
- On the **Delegation** page, click **Delegation history**.
- On the **Delegation history** page, filter which delegation are shown:
 - Valid from:** All delegations that are valid as from this time on or from a time point within this period are taken into account.

- **Valid until:** All delegations that are valid up to this time or up to a time point within this period are taken into account.
4. (Optional) Click **Advanced search** and do one of the following:
 - a. Click **Assign** next to the **Delegator** field.
 - b. In the **Employee** dialog, click on the employee who issued the delegation.
 - c. On the **Delegation history** page, click **Assign** next to the **Delegation recipient** field.
 - d. In the **Employee** dialog, click on the employee whom the delegation was issued to.
 - e. To show additional delegations that are not in effect, check the **Show never assigned delegations** box.
 5. Click **Search**.

For each delegation, you can obtain more information on **Information**, **Workflow**, **Compliance**, and **Entitlements**.

Examples

You want to show delegations that are valid as from 01/01/2019:

1. Clear all the date fields except for the first one next to **Valid from**.
2. In the field next to **Valid from**, select the date **01/01/2019**.
3. Click **Search**.

You want to show delegations that are valid from 01/01/2019 until 02/01/2019:

1. Clear the all date fields apart from the one next to **Valid from** and the first **Valid until**.
2. In the field next to **Valid from**, select the date **01/01/2019**.
3. In the field next to **Valid until**, select the date **02/01/2019**.
4. Click **Search**.

You want to show all delegations whose valid from date is between 01/01/2019 and 03/01/2019:

1. Clear all the date fields except for the first and second ones next to **Valid from**.
2. In the first field next to **Valid from**, select the date **01/01/2019**.
3. In the second field next to **Valid from**, select the date **03/01/2019**.
4. Click **Search**.

Related topics

- [Delegation history](#) on page 216

Ownerships

Ownerships is a submenu of **Responsibilities**. Here, you can assign business objects to owners or request responsibility for a group.

NOTE: In the **Responsibilities** menu, either **Assign ownership** or **Claim responsibility** is visible. Which of the menus is displayed, depends on the system settings.

Detailed information about this topic

- [Assigning owners](#) on page 218
- [Claim ownership](#) on page 219

Assigning owners

In the **Assign Ownership** menu, you can assign an owner to devices and system entitlements, which do not have owners assigned. A wizard is available to help you make the assignments.

IMPORTANT: Before you can use this function, you need the "Device ownership attestation" or "System entitlement ownership attestation" attestation policy.

NOTE: In the **Responsibilities** menu, either **Assign ownership** or **Claim responsibility** is visible. Which of the menus is displayed, depends on the system settings.

Detailed information about this topic

- [Assigning owners to devices](#) on page 218
- [Assigning system entitlements owners](#) on page 219

Assigning owners to devices

In **Assign Ownership**, you can assign an owner to a device.

NOTE: In the **Responsibilities** menu, either **Assign ownership** or **Claim responsibility** is visible. Which of the menus is displayed, depends on the system settings.

To assign an owner to a device

1. Open **Assign ownership** and click **Device**.
This opens a wizard. The view **Select a device** is active.
2. Click **Assign** next to **Device** and select a device from the list.
This selects the device and displays details about it, for example, device model, workdesk, and cost center.
3. Click **Next** and select one of the options from **Select the new owner**.
 - a. Select one of the calculated possible owners.
In this case, you do not have to change any other settings.
 - b. Select another owner.
For these settings, select an employee from the displayed list.
4. Click **Next** and then **Close** in **Results**.

Assigning system entitlements owners

In **Assign Ownership**, you can assign an owner to a system entitlement.

To assign system entitlements to an owner

1. Open **Assign ownership** and click **System entitlement**.
This opens a wizard. **Select a system entitlement** is active.
2. Click **Assign** next to **System entitlement** and select a group from the list.
This selects the group and displays details about it, for example, group type or target system.
3. Click **Next** and select one of the options from **Select the new owner**.
 - a. Select one of the calculated possible owners.
In this case, you do not have to change any other settings.
 - b. Select another owner.
In this case, select an employee from the displayed list.
4. Click **Next** and then **Close** in **Results**.

Claim ownership

You can claim ownership of a group in **Claim Ownership** under the **My Responsibilities** menu.

The groups available for selection, do not have any managers. Authorized users can take on responsibility for these groups. If you claim ownership for a group, you are accountable

for the interests of that group. For example, you decide about memberships within your group.

To change or assign a group manager

1. Open **Ownerships** and click **Claim ownership**
2. Perform one of the following tasks.
 - a. Choose **Assign** to select a group.
 - b. Choose **Change** to select a group.
3. Click **Claim ownership**.

Your settings are saved.

Auditing

Auditing describes how an aspect of a company is assessed. Quality assurance is also plays an important part in auditing. An audit is a systematic, independent, and documented examination, which assesses quality-related actions and evaluates them based on the planned requirements and targets. To successfully complete an audit there must be certain features available and specific requirements must be fulfilled.

If you are a manager or compliance officer, you have access to the **Auditing** menu. **Auditing** gives you read-only permission of any item for which you are responsible. You can use this to investigate any security issues that arise, or for similar activities. In many cases, you are able to manipulate the view to maximize its value, and export the information to a report.

Detailed information about this topic

- [Employees](#) on page 226
- [System entitlements](#) on page 230
- [Business roles](#) on page 223
- [System roles](#) on page 232
- [Assignment resources](#) on page 233
- [Organizations](#) on page 221
- [Resources](#) on page 229
- [Assignment resources](#) on page 233
- [Multi-request resources](#) on page 224
- [Multi-requestable/unsubscribable resources](#) on page 225
- [Software](#) on page 222

Organizations

Departments, cost centers, locations, and business roles are each mapped to their own hierarchy under **Organizations**. This is due to their special significance for daily work schedules in many companies. Various company resources can be assigned to organizations, for example, authorizations in different SAP systems or software. You can add employees to single roles as members. Employees obtain their company resources through these assignments when the One Identity Manager is appropriately configured.

Auditing of departments, cost centers and locations is always structured in the same way and is described here for all organizations on the basis of a department.

All departments are listed in **Auditing**, which you open from **Department** menu under **Auditing**. You can select an employee from here to view more details about their department.

After you have selected the department, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 78: Overview of department views

View	Description	Usage
Overview	Shows more details about the department in a Hyper View. This information might be assigned entitlements, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Memberships	Show all employees that have access to the selected department.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in the detailed content view.
Master data	Shows the properties entered in the master data for the department.	View of properties entered. You can edit the manager, for example.
Permissions	Shows all the assigned entitlements of the selected department.	To can view the analysis of the assignment in the detailed content view for the selected entitlement.
Risk	List properties and assignments, which contribute to the calculated risk index.	For viewing risk index functions.
Usage	Shows various role classes for viewing employee assignments for the selected department.	Select a role class to view employee assignments.

View	Description	Usage
Compliance	Lists all compliance rules for the selected department and their analysis.	For viewing compliance rule analyzes.
History	Displays the history of states and comparisons of the selected departments.	You can swap from timeline to table view. Navigate by clicking the mouse within the timeline.
Attestations	Lists all attestation cases for the selected departments.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Software

You can assign software directly or indirectly to employees. Indirect assignment is carried out by allocating employees and software in company structures, like departments, cost centers, locations, or business roles. Examples of software that can be assigned are: internet, address management, email or text editing software.

In the **Auditing** view that you open from the **Audit** menu in **Software**, you see a list of all the software applications. You can select an employee from here to view more details about their assigned software application.

After you have selected a software application, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 79: Overview of software application views

View	Description	Usage
Overview	Shows more details about the software application in a HyperView. This information might be assigned service items, managers, or system roles, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Memberships	Shows all employees that have access to the selected software application.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in the detailed content view.
Master data	Shows the properties entered in the master data for the software application.	View of properties entered. You can edit the service item, for example.
Usage	Shows various role classes for	Select a role class to view employee

View	Description	Usage
	viewing employees who are members of the selected service.	assignments.
Compliance	Lists all compliance rules for the selected software application and its analysis.	For viewing compliance rule analyzes.
Attestations	Lists all attestation cases for the selected software application.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Business roles

All business roles are displayed in a list in **Auditing** that you select **through Business Roles**. You can select an employee from here to view more details about their roles and entitlements.

After you have selected the business role, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 80: Overview of business role views

View	Description	Usage
Overview	Shows more details about the business role in a hyper view. This information might be assigned groups, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Memberships	Shows all employees that have access to the selected business role.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in the detailed content view.
Master data	Shows the properties entered in the master data for the business role.	View of properties entered. You edit the role class or the manager, for example.
Permissions	Shows all the assigned entitlements of the selected business role.	To can view the analysis of the assignment in the detailed content view for the selected entitlement.
Risk	List properties and assignments, which contribute to the	For viewing risk index functions.

View	Description	Usage
	calculated risk index.	
Usage	Shows various role classes for viewing employee assignments for the selected business role.	Select a role class to view employee assignments.
Compliance	Lists all compliance rules for the selected business role and their analysis.	For viewing compliance rule analyzes.
History	Displays the history of states and comparisons of the selected business role.	You can swap from timeline to table view. Navigate by clicking the mouse within the timeline.
Attestations	Lists all attestation cases of the selected business role.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Multi-request resources

Multi-request resources are resources that employees can request more than once in IT Shop. Requests are automatically canceled once approved. The resources are not explicitly assigned to employees. Examples include consumables such as pens or printing paper.

All resources are displayed in a list in **Auditing** that you select through **Multi-request resources**. You can select an employee from here to view more details about their resources.

After you have selected a resource, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 81: Overview of multi-request resource views

View	Description	Usage
Overview	Shows more details about the multi-request resources in a Hyper View. This information might be assigned service items, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Master data	Shows the properties entered in the master data for the resource.	View of properties entered. You can edit the service item, for example.
Compliance	Lists all compliance rules and	For viewing compliance rule analyzes.

View	Description	Usage
	their analysis for the selected multi-request resource.	
Attestations	Lists all attestation cases of the selected multi-request resource.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Multi-requestable/unsubscribable resources

Multi-requestable/unsubscribable resources are resources that an employee can request more than once in the IT Shop but must be explicitly returned once they are no longer required. They are assigned to employees after approval has been granted and They remain assigned until the request is canceled.

All resources are displayed in a list in **Auditing** that you select through **Multi-requestable/unsubscribable resources**. You can select an employee from here to view more details about their resources.

After you have selected a resource, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 82: Overview of multi-requestable/unsubscribable resources views

View	Description	Usage
Overview	Shows more details about the multi-requestable/unsubscribable resources in a Hyper View. This information might be assigned service items, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Master data	Shows the properties entered in the master data for the resource.	View of properties entered. For example, you can edit the resource type or the service item.
Compliance	Lists all compliance rules and their analysis for the selected multi-requestable/unsubscribable resource.	For viewing compliance rule analyzes.
Attestations	Lists all attestation cases of the selected multi-requestable/unsubscribable resources,	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Employees

Any employees called from **Employee** under the **Auditing** menu are listed in the **Auditing** view. Here you can select an employee and view more details. You can select the employee directly from the list or use the Web Portal's filter function. For more information, see [Filter](#) on page 36.

After you have selected the employee directly from the list, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 83: Overview of employee's views

View	Description	Usage
Overview	Displays more details about the employee in a Hyper View. For example, active assignment requests.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Master data	Display the properties for the select employee grouped under the master data.	View of properties, for example, assigned role classes or the manager.
Requests	Lists all the selected employee's requests.	Use the filter function and the advanced search to search selectively.
Rule violations	Lists all the selected employee's rule violations.	Use the filter function and the advanced search to search selectively for rule violations.
Approvals	Lists all approvals in the selected period that the select employee was involved in. The list must be filtered on other view to see an approval in more detail. <ul style="list-style-type: none">• Approvals• Exception approvals• Attestations• Policy violations	Use the filter function and the advanced search to search selectively for approvals. The advanced search is only available in Approval .
Risk	List properties and assignments, which contribute to the calculated risk index.	For viewing risk index functions.
Attestations	Lists all the attestation cases of	You can selectively search for an

View	Description	Usage
	the selected employee.	attestation case and display attestors for pending attestation cases or send reminders.
Compliance	Lists all compliance rules and their analysis for the selected employee.	For viewing compliance rule analyzes.
Roles and entitlements	Lists all the selected employee's memberships.	Use the filter function to search selectively for memberships.
Ownerships	Shows ownerships of the selected objects type for this employee.	Shows a more detailed view of ownerships. Jump to more details on the highlighted role, entitlement, or resource by using Show details in the master detail.
History	Displays the history of states and comparisons of the selected employee.	You can swap from timeline to table view. Navigate by clicking the mouse within the timeline.

Employee approvals

Approvals in the **Employee** menu display any approvals in the selected time period for which the selected employee was involved. Approvals are spread over the following views.

- Approvals
- Exception approvals
- Attestations
- Policy violations

NOTE: The advanced search is only available in **Approvals**.

To search for an approval

1. Open **Auditing | Employee** and select an employee.
2. Ensure that **Approvals** is selected in the **Approvals** view.
3. Use the extended search.

Detailed information about this topic

- [Searching](#) on page 26
- [Filter](#) on page 36

Employee memberships

Roles and entitlements shows all an employee's memberships. This view is similar to **Memberships** under **My Responsibilities**.

To view employee memberships in more detail

1. Select **Roles and entitlements**.
2. Perform one of the following tasks:
 - a. Use a filter and then mark the item you want in the result list.
 - b. Mark the entry you want in the list.

This displays details of the selected item in the detailed content view.

Detailed information about this topic

- [Filter](#) on page 36
- [System entitlements](#) on page 230
- [Business roles](#) on page 223

Application roles

One Identity Manager supplies default application roles whose permissions are matched to the different task and functions. Assign employees to default applications who take on individual tasks and functions. You can also create your own application roles for custom defined tasks.

NOTE: Default application roles are defined in One Identity Manager modules and are not available until the modules are installed. You cannot delete default application roles.

All application roles are displayed in a list in **Auditing**, which you open through One Identity Manager **Application Roles** in the **Auditing** menu. Here you can select an application role and view more details.

After you have selected a system role, you can use various views to obtain more information. You will know many of the views already from **My Responsibilities**.

Table 84: Overview of application role views

View	Description	Usage
Overview	Shows more details about the application role in a hyper view.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.

View	Description	Usage
Compliance	Lists all compliance rules for the selected application role and their analysis.	For viewing compliance rule analyzes.
Attestations	Lists all attestation cases for the selected application role.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Resources

Resources are found in One Identity Manager in IT resources and non-IT resources. Non-IT resources help an employee's work efficiency, for example, mobile phones, desks, company cars, or keys. You can assign resources directly to an employee or through classification into hierarchical roles. Similarly, you can resources request for an employee through the IT Shop. Resources are divided up from a functional point of view.

- Resources
- Multi-request resources
- Multi-requestable/unsubscribable resources

An employee can own resources (workstation, device) just once. They can be requested exactly once in the IT Shop. The resources are assigned to the employees after approval has been granted. They remain assigned until the request is canceled. You can request them again a later point. Examples are telephones or company cars.

All resources are displayed in a list in **Auditing** that you select through **Resources** in the **Auditing** menu. You can select an employee from here to view more details about their resources.

After you have selected a resource, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 85: Overview of resource views

View	Description	Usage
Overview	Shows more details about the resource in a Hyper View. This information might be assigned service items or employees, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Memberships	Shows all employees that have access to the selected resource.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in

View	Description	Usage
		the detailed content view.
Master data	Shows the properties entered in the master data for the department.	View of properties entered. You can edit the service item, for example.
Usage	Shows various role classes for viewing employees who are members of the selected service.	Select a role class to view employee assignments.
Compliance	Lists all compliance rules for the selected resource and their analysis.	For viewing compliance rule analyzes.
Attestations	Lists all attestation cases for the selected resources.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

System entitlements

In **Auditing**, you can view the entitlements assigned to an employee for the particular target system type that they manage. Each target system type has its own tile in the **Auditing** view.

Auditing of system entitlements is the same for all target system types and is therefore described here for all of them together.

System entitlements map the objects that control access to target system resources in the target systems. A user account obtains the required permissions for accessing target system resources through its memberships in system entitlements. The following system entitlements are displayed in the **Auditing** menu, for example.

- Active Directory groups
- SAP groups
- SharePoint groups

After you have selected the system entitlement, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 86: Overview of system entitlement views

View	Description	Usage
Overview	Shows more details about the system entitlement in a Hyper	To view all the information at one glance and navigate quickly to points

View	Description	Usage
	View. This might be the target system that is assigned, user accounts and service item, for example.	of interest, click the linked content in the shapes. For creating reports.
Memberships	Shows all employees that have access to the selected system entitlement.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in the detailed content view.
Master data	Shows the properties entered in the master data for the system entitlement.	View of properties entered. You can, for example, edit service items or set the risk index.
Child groups	Shows assigned sub groups.	Here you can see which groups are members in the selected system entitlement.
Usage	Show various role classes for viewing employee assignments for the selected system entitlement.	Select a role class to view employee assignments.
Compliance	Lists all compliance rules for the selected system entitlement and their analysis.	For viewing compliance rule analyzes.
History	Displays the history of states and comparisons of the selected system entitlement.	You can swap from timeline to table view. Navigate by clicking the mouse within the timeline.
Attestations	Lists all attestation cases for the selected system entitlement.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Viewing an employee's system entitlements

The view for an employee's system entitlements are explained on the basis of an Active Directory group example.

To view an Active Directory group's system entitlements

1. Select the target system in the **Auditing** Active Directory menu.
2. Select an employee in **Auditing - Active Directory** using **Change**.
This displays the system entitlements assigned to the employee.

3. Click **Show details**.

This displays other view for the selected system entitlement.

System roles

All system roles are displayed in a list **Auditing** view that you select through **System Roles in Auditing**. You can select an employee from here to view more details about their roles and entitlements.

After you have selected a system role, you can use various views to obtain more information. You will know many of the views already from **My Responsibilities**.

Table 87: Overview of system role views

View	Description	Usage
Overview	Shows more details about the system role in a Hyper View. This information might be the groups that are assigned, service item or employees, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Memberships	Shows all employees that have access to the selected system role.	You can view the origin of an assignment for a selected employee. An analysis of the assignment is shown in the detailed content view.
Master data	Shows the properties entered in the master data for the system role.	View of properties entered. You can, for example, edit service items or system role's supervisor.
Permissions	Shows all the assigned entitlements of the selected system role.	To can view the analysis of the assignment in the detailed content view for the selected entitlement.
Risk	List properties and assignments that contribute to the calculated risk index.	For viewing risk index functions.
Usage	Shows various role classes for viewing employee assignments for the selected system role.	Select a role class to view employee assignments.
Compliance	Lists all compliance rules for the selected system role and their analysis.	For viewing compliance rule analyzes.
History	Displays the history of states	You can swap from timeline to table

View	Description	Usage
	and comparisons of the selected system role.	view. Navigate by clicking the mouse within the timeline.
Attestations	Lists all attestation cases of the selected system role.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Assignment resources

Use assignment resources to request hierarchical roles, such as departments or business roles and assign them to employees, devices, and workdesks. This means, for example, you can limit assignment resources to a certain business roles, which makes it unnecessary to select the business role additionally when you request an assignment resource. It is automatically a part of the assignment request. Assignment resources are available for requesting in the shop "Identity & Access Lifecycle". For more information about assignment resources, see the One Identity Manager Business Roles Administration Guide and One Identity Manager IT Shop Administration Guide.

To display assignment resources

1. In the menu bar, click **Responsibilities | Auditing**.
2. On the **Auditing** page, click the **Assignment resources** tile.

On the **Auditing - assignment resources**, all resources are displayed in a list. You can select an employee from here to view more details about their resources.

After you have selected an assignment resource, you can gather more information through various views. You will know many of the views already from **My Responsibilities**.

Table 88: Overview of assignment resources

View	Description	Usage
Overview	Shows more details about the resource in a Hyper View. This information might be assigned service items, for example.	To view all the information at one glance and navigate quickly to points of interest, click the linked content in the shapes. For creating reports.
Master data	Shows the properties entered in the master data for the assignment resource.	View of properties entered. For example, you can edit the resource type or the service item.
Compliance	Lists all compliance rules for the selected assignment	For viewing compliance rule analyzes.

View	Description	Usage
	resource and their analysis.	
Attestations	Lists all attestation cases for the selected assignment resource.	You can selectively search for an attestation case and display attestors for pending attestation cases or send reminders.

Governance administration

In **Governance Administration**, which you reach through **Responsibilities**, you can edit business roles or system entitlements as a target system administrator. You can make the following changes, for example:

- Add a new owner role to an Active Directory group and assign a new product owner.
- Edit an Active Directory group's requestability.
- Modify entitlement properties.

Detailed information about this topic

- [Business roles](#) on page 234
- [System entitlements](#) on page 236
- [Organization](#) on page 238

Business roles

As a business role administrator, you can view every role in the **Governance Administration** menu and edit them. Deleted roles can be restored.

To view business roles

1. Open **Responsibilities | Governance Administration** and click **Business Roles**.
By default, all roles are listed with their names, managers, and roles classes. Use **Additional columns** to display more detailed about the business classes.
2. Marked the required role.
To search for the role you want, you have the usual help available such as a filter function, filter wizard, and the search function. For more information, see [Navigation and use](#) on page 18.

Detailed information about this topic

- [Editing business roles](#) on page 235
- [Restoring deleted roles](#) on page 236

Editing business roles

In **Governance Administration**, edit properties on all business roles as an administrator.

In **My responsibilities**, edit the business roles that you manage. You will find this content listed under "Detailed information about this topic" because the method of editing is the same for both menus, and each editing step in **My Responsibilities** has already been described.

To edit a role

- Select the required role and click **Edit** in the master detail.
This opens a view for the selected role with more selection options, which you will recognize from **My Responsibilities**.

Detailed information about this topic

- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159
- [Adding entitlements](#) on page 168
- [Deleting entitlements](#) on page 168
- [Splitting a role](#) on page 169
- [Viewing risk indexes](#) on page 148
- [Splitting a role](#) on page 169
- [Compare and merge](#) on page 172
- [History](#) on page 151
- [Timeline](#) on page 152
- [Status comparison](#) on page 153
- [Restoring a previous state](#) on page 174
- [Usage](#) on page 162
- [Compliance reports](#) on page 175
- [Attestations](#) on page 176

Restoring deleted roles

Another function for managing roles is restoring deleted roles. An example of a deleted role could be roles that have been sorted out during merging.

This function is also available in the views of managed organizations. Restoring a deleted role is described in the following step-by-step on the basis of a business role.

To restore deleted roles

1. Perform one of the following tasks.
 - Open the **Business roles** menu and **Restore a deleted role**.
 - OR -
 - Restore a lower-level role by selecting a business role in the **Business roles** menu and clicking **Restore**.

This opens a dialog. The view **Select deleted role** is enabled and lists all the deleted objects.

| **NOTE:** You can set a date in order to limit your search for deleted roles.

2. Select the desired role and click **Next**.

Multi-select is possible. The view **Verify** appears and lists the actions that will be run on restore.
3. You can deselect individual actions if you do not want to run them all. Click **Continue**.
4. Close the dialog.

System entitlements

You will find the target system manager responsibilities under **Governance Administration**.

- Add a new owner role and assign a product owner to an Active Directory group if you are target system administrator. You can also edit the requestability of an Active Directory group.
- Change the properties of the entitlement. For more information, see [Master data](#) on page [166](#).

To open the "System Entitlements" menu

- Open **Responsibilities | Governance Administration** and click **System Entitlements**.

Detailed information about this topic

- [Assigning product owners](#) on page 237
- [Assigning attestors](#) on page 237

Assigning product owners

In the **Governance Administration** menu, you can assign a new product owner to an Active Directory group.

To assign a new product owner

NOTE: This function is only available if the module Active Directory Module is installed.

1. Open **System entitlements** and select the required Active Directory group.
NOTE: Before you can assign a new product owner, you must add a new owner role for this employee.
2. Select the **Owner** view and click **New**.
3. Enter a name for the new owner role and a reason for creating it.
NOTE: After adding the new owner role, assign a product owner to it.
4. Select a product owner using **Assign** and the new owner role using **Product owner**.
NOTE: If **Without owner in AD** was selected in **Product owner**, you cannot select a product owner.

Assigning attestors

In the **Governance Administration** menu, you can assign an attestor to an Active Directory group.

To assign an attestator

1. Open **System entitlements** and select the required Active Directory group.
NOTE: Before you can assign a new attestor, you must add a new application role.
2. Select the **Attestor** view and click **New**.
3. Enter a name for the new application role and a reason for creating it.
NOTE: After adding the new application role, assign an attestor to it.
4. Use **Assign** to select attestors and select the new application role using **Attestors**.

Organization

As administrator, you can view and edit all the organizations in **Governance Administration**. Deleted roles can be restored. Organizations are divided into cost centers, departments, and locations.

To select an organization

1. Open **Responsibilities | Governance Administration** and click **Organization**.
This opens **Organization**.
2. Select the organization type required.
This lists all the roles belonging to the selected organization type. Use **Additional columns** to display more details about the organization type.
3. Marked the required role.
To search for the role you want, you have the usual help available such as a filter function, filter wizard, and the search function. For more information, see [Navigation and use](#) on page 18.

Detailed information about this topic

- [Editing roles](#) on page 238
- [Restoring roles](#) on page 239

Editing roles

You can edit roles in **Governance Administration** under **Organizations**.

To edit a role

1. Select the required role and click **Edit** in the master detail.
This opens a view for the selected role with more selection options, which you will recognize from **My Responsibilities**.
2. Perform one of the following tasks:
 - a. Edit the master data.
 - b. Request or delete memberships.

Detailed information about this topic

- [Master data](#) on page 166
- [Adding memberships](#) on page 158
- [Deleting memberships](#) on page 159

Restoring roles

In **Governance Administration** under **Organizations**, you can restore deleted roles.

To restore a deleted role

1. Select the required role and click **Restore a deleted role** in the master detail.
This opens a dialog. The view **Select deleted role** is enabled and lists all the deleted objects.
NOTE: You can also select **Select a deleted role** before you select the organization type.
NOTE: You can set a date in order to limit your search for deleted roles.
2. Select the desired role and click **Next**.
Multi-select is possible. The view **Verify** appears and lists the actions that will be run on restore.
3. You can deselect individual actions if you do not want to run them all. Click **Continue**.
4. Close the dialog.

Applications

You may be able to access other applications, as configured by your system administrator. This provides you with a shortcut to other web applications deemed of value by your company.

NOTE: If you are a system administrator, and would like to add applications, see the One Identity Manager Web Designer Reference Guide.

To access other web applications from the Web Portal

- Open **Applications** and select the required web application.
The application may appear within the Web Portal, or in a separate window, depending on how the system administrator configured it.

Calls

In the **Calls** menu, you can add new calls or view all calls in the call history.

Detailed information about this topic

- [Adding new calls](#) on page 241
- [Call history](#) on page 241

Adding new calls

When you add new calls, you report problem cases with different causes. For example, a call can be added for an employee who reports a problem or for products for which conditions of contact were specified. Even a device or workdesk associated with the problematic device, can play a part when adding a call.

To add a new call

1. Open **New Call**.
2. Enter a detailed description of the problem and select the affected product.
3. Set the severity of the problem in **Severity** and select a cost center using **Assign**.
4. Select an additional employee using **Assign** and click **Save**.

Call history

In the **Call History** view, you can see all placed calls.

| NOTE: Use the check boxes at the top of the section to limit the calls shown.

To view a specific call

1. Open **Call history** and select a call from the list.


More information about the call is displayed in the detailed content view. You can subsequently change **Severity**, **Description** and **Product** entries on the **Master Data** tab.

2. View the staff involved, status, and measures taken on the **History** tab.
3. View attachments on the **Attachments** tab.
4. Click **Save**.

Removing attachments


In the **Call History** menu, you can remove single files that have been added as attachments to a call.

To delete a file from a call's attachments

1. Open **Call history** and select a call from the list.
2. Select **Attachments** in the master detail and click  next to the file.
3. Confirm the message with **Yes**.

This deletes the file from the **attachments**.

Settings

The  **Settings** menu is below the header on the right-hand side of the screen. When you open this option, **My Settings** view is displayed with more possible options.

Detailed information about this topic

- [Mail subscriptions](#) on page 243
- [Personal dashboard settings](#) on page 244
- [Subscriptions](#) on page 244
- [Reports](#) on page 248


Mail subscriptions

You can use this menu item to define which events you would like to be notified about through email. This is done by setting check boxes. The possible number of notifications is already configured and you cannot change the setting. The following email notifications are possible:

- Attestation - reject approval
- Attestation - answer
- Attestation - approval required
- Attestation - delegated/additional approval
- Attestation - remind approver
- Attestation - question
- Report subscription - delivery
- Report subscription - delivery to cc
- IT Shop request - canceled
- IT Shop request - aborted
- IT Shop request - expired

- IT Shop request - reject approval
- IT Shop request - answer
- IT Shop request - approval required
- IT Shop request - delegated/additional approval
- IT Shop request - remind approver
- IT Shop request - escalation
- IT Shop request - question
- IT Shop request - not granted approval
- IT Shop request - approval not granted to approval step
- IT Shop request - granted approval
- IT Shop request - approval granted to approval step
- IT Shop request - product expires
- IT Shop request - product change

To subscribe or unsubscribe mail

1. Open the  **Settings** menu and click **Mail Subscriptions**.
2. Enable the checkbox **Receive email** on the required mail template and click **Save**.

Personal dashboard settings

In **Personal Dashboard Settings**, you can hide or show dashboards with neutral trends. Dashboards with "neutral trends" are those that have not change recently. By default, this filter is not enabled. You can also hide other dashboards. To hide individual dashboard, you can use the filter function on the desired dashboard view. For more information, see [Hiding statistics](#) on page 255.

To show a dashboard





1. Open **Personal Dashboard Settings**.
2. Perform one of the following tasks.
 - a. Enable **Show dashboards with neutral trends**.
 - b. Select one of the displayed statistics that you want to display again.
3. Click **Save**.

Subscriptions

Subscriptions can be found in the Web Portal under  **Settings**.

The reports you have subscribed are listed in **Subscriptions**. You can modify your report subscriptions or subscribe to new reports. In the following table, actions are listed that you can run on subscribed reports.

Table 89: Actions for subscribed reports

Icon	Description
	Edit subscription settings.
	Add employees to this subscription.
	Send report now.
	Cancel the subscription.

Detailed information about this topic

- [Adding subscriptions](#) on page 245
- [Editing subscription settings](#) on page 246
- [Receive subscription immediately](#) on page 247
- [Ending subscriptions](#) on page 247

Adding subscriptions

In **My Subscriptions**, you can add new subscriptions.

To add a subscription

1. Open **My Subscriptions** and click **Add subscription**.
2. Mark the report you want to subscribe to in **Available reports** and click **Next**.
3. Set the following options in **Edit report parameters** and save the changes.

Table 90: Editing subscription settings

Setting	Description
Subscription	Field for entering or editing the subscription name.
Schedule	Menu for selecting how often the report is sent. The following options are available: <ul style="list-style-type: none">• Monthly report subscriptions• half-yearly report subscriptions• Yearly report subscriptions• Quarterly report subscriptions

Setting	Description
	<ul style="list-style-type: none"> • Daily report subscriptions • Weekly report subscriptions
Format (e-mail attachment)	<p>Menu for selecting the report format. The report can be sent in the following formats:</p> <ul style="list-style-type: none"> • CSV • DOCX • HTML • PDF • RTF • TEXT • TIFF • XLS • XLSX • XML • XPS

Editing subscription settings

In **My Subscriptions**, you can edit your subscriptions at any time.

To edit subscription settings


1. Open **My Subscriptions** and select a subscribed report.
More information about this report is displayed in the detailed content view; for example, how often it appears or any additional subscribers.
2. Click  in the detailed content view.
3. Edit the following settings in **Edit subscription settings** and save the changes.

Table 91: Editing subscription settings


Setting	Description
Subscription	Field for entering or editing the subscription name.
Schedule	<p>Menu for selecting how often the report is sent. The following options are available:</p> <ul style="list-style-type: none"> • Monthly report subscriptions • half-yearly report subscriptions

Setting	Description
	<ul style="list-style-type: none"> • Yearly report subscriptions • Quarterly report subscriptions • Daily report subscriptions • Weekly report subscriptions
Format (e-mail attachment)	<p>Menu for selecting the report format. The report can be sent in the following formats:</p> <ul style="list-style-type: none"> • CSV • DOCX • HTML • PDF • RTF • TEXT • TIFF • XLS • XLSX • XML • XPS

Receive subscription immediately

You can receive you subscribed report immediately in **My Subscriptions**.

To receive a subscription immediately

1. Open **My Subscriptions** and select a subscribed report.
2. Click  in the detailed content view.

A message is displayed in **My Subscriptions** to inform you that an email has been sent with the report to your email address.

Ending subscriptions

You can end report subscription in **My Subscriptions**.

To end a subscription

1. Highlight the required report in **My subscriptions** and click  in the master detail.
2. Confirm with **Yes**.

Reports

You will find report in the Web Portal under the  **Settings**.

You can view and edit reports in the **Reports** view. You can also create your own reports and organizations or assign employee.

Detailed information about this topic

- [New report](#) on page 248
- [Viewing report definitions](#) on page 249
- [Displaying reports](#) on page 252
- [Exporting reports](#) on page 252

New report

You can add new reports in the **Reports** view. To do this, you enter the master data.

MOBILE: This function is not available in the mobile interface.

To create a report

1. Click **New report** in **Reports**.
2. Configure the following in the **Create a new report** view.

NOTE: Any fields that are not marked with an asterisk (*) are optional. Optional fields can be filled in when you create the application or at a later stage.

Table 92: Master data for a new report

Setting	Description
Name*	Field for the report name. Enter the report's name.
Report definition	Select the base table with Assign . You can edit the selected base table using Result columns and Edit Filter .

Setting	Description
	Once a base table has been assigned, you can change the assignment with Change .
Risk index	Display a scale of 0 to 1 for the risk index and two slide rulers. Specify a beginning and an end value within the scale.
Owner	Name of the report owner. Use Change to select from a list of owners.
Service item	Creating a new service item. Use Create a new service item to create a new product. You can disable this report definition using Disable .
Assign to employees	Selecting other employees as report recipients. Use Change to select an employee to receive the report.
Assign to departments	Selection of departments to receive the report. Use Assign to select a department to receive the report.
Assign to Locations	Selection of locations to receive the report. Use Assign to select a location to receive the report.
Assign to cost centers	Selection of cost centers to receive the report. Use Assign to select a cost center to receive the report.

3. Click **Save**.

Viewing report definitions

Use **View report definition** to view more information about an existing report and make changes if required.

- Overview
View assigned properties of the selected report in a Hyper View.
- Master data
Edit and modify report properties.

- Usage
View employee assignments to a role class.

Detailed information about this topic

- [Overview](#) on page 250
- [Master data](#) on page 250
- [Usage](#) on page 251

Overview

With **View report definition**, you open, among other things, an overview of the selected report. All relevant information about the report is provided in abbreviated form in the overview, such as, assigned employees or application roles. They are displayed in shape elements.


To view an report's overview

1. Open **Reports** and select the report you want to view.
2. Click **View report definition**.
3. Select **Overview** to view all the information about an employee at a glance.

Master data

Use **View report definition** to open the master data to add missing properties or to edit properties such as the risk index.

To edit the master data

1. Open the  **Settings** menu and click **Reports**.
2. Select a report and click **View report definition**.
3. Select **Master data** and edit the following settings.

NOTE: Any fields that are not marked with an asterisk (*) are optional. Optional fields can be filled in when you create the application or at a later stage.

Table 93: Report master data

Setting	Description
Name*	Field for the report name. Enter the report's name.

Setting	Description
Report definition	Base table selection. Use Change to select the base table you want from a list.
Risk index	Display a scale of 0 to 1 for the risk index and two slide rulers. Specify a beginning and an end value within the scale.
Owner	Name of the report owner. Use Change to select from a list of owners.
Service item	Creating a new service item. Use Create a new service item to create a new product. You can disable this report definition using Disable .
Assign to employees	Selecting other employees as report recipients. Use Change to select an employee to receive the report.
Assign to departments	Selection of departments to receive the report. Use Assign to select a department to receive the report.
Assign to Locations	Selection of locations to receive the report. Use Assign to select a location to receive the report.
Assign to cost centers	Selection of cost centers to receive the report. Use Assign to select a cost center to receive the report.

4. Click **Save**.

Usage

Through **View report definition**, you can view employee assignments to a role class on **Usage**.

To view which roles are contained in a predefined report

1. Mark a report in **Reports** view and click **View report definition**.
2. Select the **Usage** view.

3. Select a role class in the **Role classes** menu to see the roles contained in the report.
4. Select **More information** to view employees assigned to the role memberships.

Displaying reports

You can display a report completely in the **Reports** view. For example, all departments with managers and calculated risk index, are displayed for the report "Departments with increased violations".

To view the base table configured for the report

- Mark a report in the **Reports** view and click **View report** in the detailed content view.

The base tables for this report are shown in the report view.

Exporting reports

Reports can help you to make necessary decisions. For example, when you are viewing your file system or SharePoint resources, you can view reports to help determine ownership. Or when you are performing attestations, you can view current information on the item to which you are attesting.

1. Select **Export this view**.

This opens the **Export this view** dialog. You have several options.

2. Enable the following setting if necessary.

All pages	All pages of the view were exported. If this setting is not enabled, only the current page is exported.
Remove header	This setting is only available for CSV format.

3. Perform one of the following tasks:
 - a. Select either **Export as PDF**.
 - b. Select the option **Export as CSV**.
 - c. Select **Show as web page**.

The report is exported in the respective format.

Discovering your statistics on the start page

Statistics are graphical summaries of the information pertaining to you. You can open your statistics on the start page taking your access permissions and entitlements into account.

NOTE: In earlier versions of the Web Portal, these statistics are located under **Access Governance**.

More statistics about managed organizations, system entitlements, business roles and system roles are available for managers in **My Responsibilities**.

The data on the start page is updated daily. You can customize the data you see on the dashboard by selecting the objects you want to include, and which statistics you want to show for each object. Checking your dashboard regularly can help you understand any issues that need addressing. For more information, see [What statistics are available?](#) on page 258.


Detailed information about this topic








- [Statistics](#) on page 253
- [Heatmap](#) on page 256
- [What statistics are available?](#) on page 258

Statistics

Graphical representation of data is depicted by diagrams. Heatmaps also provide data in graphical form. For more information, see [Heatmap](#) on page 256.

Table 94: Icons used in diagrams

Icon	Meaning
	The value in this statistic is in the balance. It is neither critical nor compliant. You should keep an eye on this value or statistic.

Icon	Meaning
	This value has not changed. The date of last change is shown.
	This icon verifies that the value in this statistic is compliant. The arrow icon displayed in combination with this icon is also green and provides more detailed information about changes to the value.
	This icon indicates that the value in this statistic is in the critical range. The arrow icon displayed in combination with this icon also means critical and provides more detailed information about changes to the value.
	This arrow icon shows an increasing value since the last change and is colored green. The value is still in a compliant range. The difference since the last change is shown.
	This arrow icon shows a decreasing value since the last change and is colored green. The value is still in a compliant range. Moving the mouse over the icon shows the difference since the last change.
	This arrow icon shows an increasing value since the last change and is colored red. The value is in the non-compliant range and more critical than before. The difference since the last change is shown.
	This arrow icon shows a decreasing value since the last change and is colored red. The value is in the non-compliant range but better than before. Moving the mouse over the icon shows the difference since the last change.


Detailed information about this topic

- [Viewing statistics](#) on page 254
- [Hiding statistics](#) on page 255
- [Viewing source data](#) on page 255
- [Apply filter](#) on page 255

Viewing statistics


The use of Hyper Views, heatmaps, and statistics differs between the desktop view and the mobile view. For more information, see [Heatmaps and statistics in the mobile view](#) on page 47.

To open a statistics view



1. Select the start page  .
Roles and organizations are displayed on the start page.
2. Click the role or organization you want to see in more detail.

Depending on your selection, you are shown statistics either in form of a table or a heatmap. There are also, however, roles, or organizations, which take you to a page with source data.

Hiding statistics

You can hide statistic, which are not relevant. These you can show again at any time over your **Personal Dashboard Settings** in the  **Settings**. For more information, see [Personal dashboard settings](#) on page 244.

To hide statistics

1. Select the start page using  .
Roles and organizations are displayed on the start page.
2. Click the role or organization you want to see in more detail.
3. Click  the selected role's view.
4. Disable one or more statistics in the list that you do not want to see anymore.
5. Close the dialog.
This hides the selected statistics.

Viewing source data

You can only view source data for certain roles and organizations. You can view a heatmap or statistics, with graphical representation, through certain roles or organizations.

To view source data from a role or organization

1. Select the start page.
Roles and organizations are displayed on the start page. These roles or organizations are divided into their associated subgroups.
2. Click the role or organization you want to view in more detail, for example, departments without managers.
This displays a view with the corresponding data.

Apply filter

You can filter the information displayed on your dashboard to suit you own requirements.

To customize the information displayed on a statistics view

- Apply a filter to the statistic view.

This opens a dialog for the selected filter. For more information, see [Filter](#) on page 36.

| **NOTE:** The filter function is not available for all statistics.

Heatmap

The heatmap in the Web Portal presents roles and organizations as colored squares. They are intended to help you quickly visualize particularly prominent values within a large amount of data and to comprehend them at a glance. The size of the rectangles corresponds to the relative size of the role or organization. The more employees you have in a company's structure, for example, the larger the rectangle in the view.

| **NOTE:** An overview of the company structures you manage is displayed on the start page.

The rectangle colors correspond to a selectable, linked-in data value, and range from red to green, where red stands for a value tending to require more attention. Red indicates, for example, a lot of compliance rule violations or employees with high risk indexes. Yellow indicates for an average, which can also mean that there has been no changes to this company structure since the last analysis. The heatmap not only provides a clear overview of the current data, but also provides another useful function by making a historical comparison to previous data.

You can see the following risky results or properties in a heatmap.

- Policy violations
- Average number of permissions per employee
- Highest employee risk index
- Average employee risk index
- Rule violations
- Highest resource risk index by host

| **NOTE:** Hyper Views, heatmaps, and statistics have different behavior in the desktop view as opposed to the mobile view. For more information, see [Heatmaps and statistics in the mobile view](#) on page 47.

Detailed information about this topic

- [Viewing data](#) on page 257
- [Viewing changes for a specific period](#) on page 257
- [Limiting the amount of data](#) on page 257
- [Displaying object details](#) on page 257

Viewing data

Without having set any preferences, the color map is displayed as a data value when you open it, for example, for the number of compliance rules.

To view data from a role or organization

1. Select the start page.
2. If available, click the role or organization in the form of a heatmap that you would like to view more closely.

NOTE: In the first field, you can set the size of the square. Available settings are **Dynamic size** and **Unisize**.

3. Limit your selection by selecting one or more objects with **Change**.
4. Confirm your selection by clicking **Close**.

Your selection is displayed to the left of **Change**.

Viewing changes for a specific period

In a heatmap you can view data within a specific time period.

To view data for a specific time period

- Select the required entry from the second field, for example "Month-to-date changes".

The data is displayed in the heatmap according to your selection.

Limiting the amount of data

You can limit the amount of data displayed in the heatmap by using the slide rule.

To limit the size of the data

- Click one of the slide rules in the scale at the bottom of the view to limit the data size.

NOTE: You may be shown up to 500 data sets graphically.

Displaying object details

To get more information, you can call up object details about an rectangle in a heatmap.

To obtain more information about individual roles or organizations

1. Click the rectangle in the view after you have configured your settings and the Web Portal has adjusted the view accordingly.

Another shape is displayed for the rectangle with additional information.

NOTE: To display additional information about the role or organization you are interested in, hover the mouse over the corresponding rectangle. This information is not so comprehensive and is there to provide initial orientation within the heatmap.

2. Perform one of the following tasks:
 - a. Click one of the items to obtain more information.
 - b. Select more information through **View object details**.

A view with detailed information, spread over several tabs, is displayed for the square you click.

What statistics are available?

The statistics and heatmaps you see in the Web Portal depend on your roles and permissions. Only statistics relevant to you are available on the start page.

Statistics can be customized to display the objects and statistics that interest you. You can also sort and filter statistical information or export it as a report. For more information, see [Discovering your statistics on the start page](#) on page 253.

Detailed information about this topic

- [High-risk overview](#) on page 258
- [Compliance](#) on page 259
- [Risk](#) on page 260
- [Policies](#) on page 261
- [Organization](#) on page 261
- [IT shop](#) on page 262
- [Attestations](#) on page 263
- [Target systems](#) on page 263

High-risk overview

This overview lists high-risk objects and divides them into different groups that can be expanded and collapsed. Each of the groups displays resources with the highest risk factor, which you manage. Risk indexes are calculated for employees, user accounts, system

roles, structures, organizations, and business roles. Risk indexes are calculated for employees, user accounts, system roles, IT Shop structures, organizations, and business roles, file systems, and SharePoint resources. Objects have risk values, which provide the risk index when combined with risk index functions. You can view the following information in **High-Risk Overview** statistics.

- Objects with the highest overall risk
- For more information on risk function calculators, see [Modifying Risk Calculators](#).

Compliance

NOTE: This function is only available if the module Compliance Rules Module is installed.

The Manager can be used to define rules for maintaining and monitoring regulatory requirements and automatically deal with rule violations. Rules are used for locating rule violations and to prevent them.

Statistics are available on the following topics.

Table 95: Overview of statistics on compliance rules

Statistics	Description
Pending rule violations	Show all types of rule violations.
Compliance violations	Shows compliance violations This statistic is available for different company structures. <ul style="list-style-type: none">• Department• Location• Cost center• Business role
Compliance violations according to rules	Shows compliance rule violations for each rule.
New rule violations	Show new rule violations. This statistic is also available for new rule violations in recent months.
Overdue rule violations	Shows overdue rule violations.
Assignments that contribute to violations	Show assignments that contributed to violations.
Last approvals granted (rule violations)	Show the last granted approvals that contributed to rule violations.

Statistics	Description
Cost centers with increased violations	<p>Show the cost centers that stand out due to a high rate of violations.</p> <p>This statistic is also available for other company structures.</p> <ul style="list-style-type: none"> • Departments • Locations
Last approvals (rule violations)	Show the last approvals that contributed to rule violations.

For more information, see [Governance administration](#) on page 132.

Risk

There are various statistics available to you for risk assessment. The following statistics are available for this topic.

Table 96: Risk assessment statistics

Statistics	Description
Number of active employees with a risk index of more than 0.5	Shows the number of active employees with a risk index more than critical value.
Highest person risk index by department	<p>Show the highest risk index of all employees by department.</p> <p>This statistic is also available for other company structures.</p> <ul style="list-style-type: none"> • Location • Cost center • Business role
Average person risk index by department	<p>Shows the average risk index of employees by department.</p> <p>This statistic is also available for other company structures.</p> <ul style="list-style-type: none"> • Location • Cost center • Business role
Employees by risk index	Show all employees in groups of risk index in the same range.

Policies

Other, different statistics are available for company policies.

Table 97: Company policy statistics

Statistics	Description
Pending Policy Violations	Shows pending policy violations.
Overdue policy violations	Shows overdue policy violations.
Policy violations by department	<p>Shows policy violations by department.</p> <p>This statistic is available for different company structures.</p> <ul style="list-style-type: none">• Location• Cost center• Business role
New policy violations	<p>Shows new policy violations.</p> <p>This statistic is also available for new policy violations within the last month.</p>
Policy violations (actual)	<p>Shows current policy violations.</p> <p>This statistic is also available for new policy violations within the last seven days.</p>
Policy violation approval rates	Shows the approval rate for policy violations.
Last approvals (policy violations)	Show the last approvals, which contributed to policy violations.
Last approvals granted (policy violations)	Show the last granted approvals, which contributed to policy violations.

Organization

The following statistics are displayed for departments you manage.

- Information about employee accounts
- Information about employees
- Rule violations
- Information about pending requests
- The top roles and entitlements

For more information, see [Departments](#) on page 180.

IT shop

The shop is the mechanism employees use to make requests. These statistics help you to answer the following questions.

- Which products are the most popular, both by product owner and by shop
- How fast requests are processed
- Request frequency over time

Table 98: Statistics about IT shop structures

Statistics	Description
Pending requests	Displays all pending requests.
Open requests by service category	Displays all pending requests by service category. This statistic contains other criteria. <ul style="list-style-type: none">• By next approver• By recipient
Last approvals granted (Shop)	Shows the last approvals granted for requests.
New requests	Shows new requests.
Number of requestable products	Shows the number of products that can be requested.
Denied requests by service category	Shows denied requests by service category.
Average request processing time by shop	Show the average processing time of a request by shop.
Top 10 requested products by shop	Shows the top 10 requested products by shop. This statistic is also available for the top 10 requested products by product owner.
Request frequency (12 months)	Shows the frequency of requests within the last 12 months. This statistic is also available for the frequency of requests within the last 12 months by owner.

For more information, see [Departments](#) on page 180.

Attestations

There are a number of statistics available to you for attestation cases. The following statistics are available.

Table 99: Attestation case statistics

Statistics	Description
Pending attestation cases	Displays all open attestation cases. This statistic contains other criteria. <ul style="list-style-type: none">• By policy• By next approver• By framework
Attestation approval rates	Shows the approval rate for attestation.
Decided attestation approvals within/over the limit	Shows attestation approvals decisions within/over the limit. This statistic is also available for pending attestation cases within/over the limit.
Attestation status by type	Show attestation status by type.
Attestations	Shows all attestations.
Last approvals (attestation)	Shows the most recent attestation approval decisions. This statistic is also available for attestations that have been granted approval.
Overdue attestations	Displays overdue attestations.

Target systems

There are a number of statistics available to you for target systems. The following statistics are available.

Table 100: Target system statistics

Statistics	Description
Pending attestation by system entitlements	Shows pending attestation by system entitlements.
Number of user accounts with a risk	Shows the number of user accounts with a risk

Statistics	Description
index of more than {0}	<p>index more than specified value.</p> <p>This statistic is also available for the number of entitlements with a risk index more than specified value.</p>
User accounts having risk higher {0} by domain	<p>Shows user accounts with a risk index more than specified value by domain.</p> <p>This statistic contains other criteria.</p> <ul style="list-style-type: none"> • Entitlements having risk higher that a specified value by domain. • Entitlements having risk higher that a specified value by department.
Employees without user accounts	Show employees without user accounts.
Entitlements without requests	<p>Shows entitlements without a request.</p> <p>This statistic contains other criteria.</p> <ul style="list-style-type: none"> • Active Directory • Oracle E-Business Suite • LDAP • SAP R/3 • SharePoint
Groups with / without user account assignments	<p>Shows groups with or without user account assignments.</p> <p>This statistic contains other criteria.</p> <ul style="list-style-type: none"> • Active Directory • LDAP • SAP R/3 • SharePoint • Notes • Groups, roles, and profiles with/without user account assignments SAP R/3
Inactive employees with enabled user accounts	Shows inactive employees with enabled user accounts.
Locked user accounts of enabled employees	Shows locked user accounts of active employees.

One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

Contacting us

For sales and other inquiries, such as licensing, support, and renewals, visit <https://www.oneidentity.com/company/contact-us.aspx>.

Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at <https://support.oneidentity.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to videos at www.YouTube.com/OneIdentity
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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