



One Identity Manager

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.

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## General tips and getting started

You can use the Web Portal to request and cancel products, and to renew current requests with limited lifetimes. If you own the respective entitlements, you can also approve requests and cancellations, perform attestation, view rule violations, and approve or deny exception approvals. You can also call up a wide range of statistics.

**NOTE:** This guide describes the Web Portal with its factory settings. Your version of the Web Portal may be different because your Web Portal may have been customized.

In addition, which Web Portal functionality is available to you is controlled by a role model in the database. This guide describes all the Web Portal functions. If you cannot find one of the functions described here in your Web Portal, it may be due to insufficient permissions. In this case, ask your administrator.

### Tips for using the Web Portal

- Enable JavaScript in your browser for the Web Portal to work.
- For optimal displaying of the graphical user interface, use a device with a minimum screen resolution of 1280 x 1024 pixels and at least 16-bit color depth. For mobile viewing, for example when using a tablet, use a device with a display size of at least 9.7 inches.
- Supported browsers:
  - Firefox (release channel)
  - Chrome (release channel)
  - Safari (current version)
  - Microsoft Edge (release channel)

### Detailed information about this topic

- [Logging in and out](#) on page 14
- [Navigation and use](#) on page 16
- [Displaying the address book](#) on page 20
- [Managing password questions](#) on page 20
- [Changing passwords](#) on page 22

- [Switching languages](#) on page 24
- [Enabling/disabling email notifications](#) on page 24
- [Report subscriptions management](#) on page 25
- [The user interface layout](#) on page 27

## Logging in and out

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

- [Logging in](#) on page 14
- [Logging in to the Password Reset Portal](#) on page 15
- [Logging off](#) on page 16

## Logging in

Open the Web Portal in a web browser.

### *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. On the Web Portal login page, in the **User name** field, enter your full user name.
3. In the **Password** field, enter your personal password.
4. Click **Log in**.

### Related topics

- [Changing passwords](#) on page 22

# 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, and manage your password questions.

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 passcode***

1. Open the Password Reset Portal URL in your web browser.  
The Password Reset Portal opens.
2. On the login page, in the **Authentication** menu, select the **Login with passcode** option.
3. In the **User name** field, enter your user name.
4. In the **Enter characters from the image** field, enter the Captcha Code displayed.  
**TIP:** If you cannot clearly identify the CAPTCHA code displayed, click **Refresh image**. A new CAPTCHA code is then generated.
5. Click **Next**.
6. In the **Passcode** field, enter your passcode.
7. Click **Submit**.

## ***To log in to Password Reset Portal using your password questions***

1. Open the Password Reset Portal URL in your web browser.  
The Password Reset Portal opens.
2. On the login page, in the **Authentication** menu, select the **Log in by answering your password questions** option.
3. In the **User name** field, enter your user name.
4. In the **Enter characters from the image** field, enter the Captcha Code displayed.  
**TIP:** If you cannot clearly identify the CAPTCHA code displayed, click **Refresh image**. A new CAPTCHA code is then generated.
5. Click **Next**.
6. In the fields, enter the appropriate answers to your password questions.
7. Click **Submit**.

### ***To log in to Password Reset Portal using your current password***

1. Open the Password Reset Portal URL in your web browser.  
The Password Reset Portal opens.
2. On the login page, in the **Authentication** menu, select the corresponding authentication method.
3. In the **User name** field, enter your user name.
4. In the **Password** field, enter your personal password.
5. Click **Log in**.

### **Related topics**

- [Logging in](#) on page 14
- [Logging off](#) on page 16

## **Logging off**

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

### ***To log off from Web Portal***

1. In the header, click  (**Profile**) > **Log Off**.
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**

This chapter describes how you navigate through the Web Portal and how to utilize the Web Portal.

### **Detailed information about this topic**

- [Simple navigation](#) on page 17
- [Search](#) on page 18
- [Help](#) on page 19
- [Filtering](#) on page 20



# Simple navigation

## Simple commands

**Table 1: 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.

## Go to the home page

**Table 2: Overview of key combinations for navigating**

Tab	Navigate forward
Shift + Tab	Navigate backwards
Enter key	Run an action

## Simple elements

**Table 3: Overview of the controls used**

Button	Use the Tab key to navigate to the control and press Enter to run the action.
Link	Navigate to the required link with Tab and press Enter to open a new page or dialog.
Dialog window	Click the Esc key to leave the dialog window without taking any action. Click Enter to run. If there is more than one action available, navigate to the desired action with the Tab key and press the Enter key.
Menu	Navigate to the menu using Tab. The selected element changes its color. Press Alt+ <b>Move down</b> or <b>Move up</b> 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.

Check box	Use the Tab key to navigate to the required check box and press Space to enable the check box.
Option	Use the Tab key to navigate 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 4: 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.
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## Search

Many of the pages provide a function to search for objects in context.

**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 5: Rules with examples for searching in the Web Portal**

Example	Description
Sam User	Finds Sam User but not Sam Identity. Search results must contain all of the separate terms in the query. A logical <b>AND</b> is used.
Sam OR Identity	Finds Sam User and Pat Identity. Placing <b>OR</b> between the search terms acts as a logical OR operator. The results of this search contain at least one of the two search terms.
Sam NOT User	Finds Sam Identity but not Sam User. The results of this search do not contain the term that comes after <b>NOT</b> .
U*	Finds User1 and User2. The * functions as a wildcard for any number of characters to complete the term.
Use?	Finds User but not User1. The ? functions as a wildcard for a single character to complete the term.
"Sam User"	Provides results in which the search terms <b>Sam</b> and <b>User</b> follow one another. Results of this search contain the string in quotes as phrase.

Example	Description
Sam User~	<p>Finds Sam User and also other similar results. A tilde ~ after the search term indicates that the search should also find similar results. This means that incorrectly spelled terms can be found, as well.</p> <p>You can specify the level of similarity by adding a number between <b>0</b> and <b>1</b> (with decimal point) after the tilde ~. The higher the number, the more similar the results.</p>

## Detailed information about this topic

- [Context searching](#) on page 19

## Context searching

The context search is available to you where multiple items are listed.

### *To run a context search*

1. In the 🔍 **Search** field, enter the search term.  
Any results matching your query are displayed.
2. (Optional) To clear the search, click ✕ (**Reset filter**).

## Help

You can find the help menu in the header bar. Several menu items are shown when you select this menu.

## Detailed information about this topic

- [Using the help](#) on page 19

## Using the help

You can use the guide as well as online help to answer questions about the Web Portal.

### *To call up help in the Web Portal*

- In the header, click ? (**Help**) > .

# Filtering

You can find the filter function represented by ▼ (**Filter**) on a lot of pages. It provides you with a selection of different filters.

| **NOTE:** The contents of the filters vary depending on context.

## *To use a filter*

1. On the page with the filter function, click ▼ (**Filter**).
2. In the menu, enable the filter that you want to apply.
3. (Optional) To reset the filter, click ▼ (**Filter**) and then **Clear filters**.

# Displaying the address book

If you need information about an identity such as the phone number or location, you can use the address book.

## *To display the address book*

1. In the header, click 👤 (**Profile**) > **Address Book**.  
This displays the address book and all identities.
2. (Optional) On the **Address Book** page, click an identity.  
In the **Edit Identity Data** pane, there are further details about the identity.

# Managing password questions

If you forget your password, you can change it at any time in the Web Portal (see [Changing passwords](#) on page 22). To do this, you need to define individual questions that only you can answer.

If your password questions are answered incorrectly several times, they may be locked (depending on the system configuration). You can reset locked password questions at any time.

| **TIP:** Once a password question is locked because you answered it incorrectly, you will be asked to answer another password question. This is repeated until there are not enough (unlocked) password questions left. To be on the safe side, make sure you create enough password questions.

If the Web Portal is configured accordingly, password questions are deleted after successful use.


## Detailed information about this topic

- [Creating password questions](#) on page 21
- [Editing password questions](#) on page 21
- [Deleting password questions](#) on page 22

# Creating password questions

You can create new password questions.


### *To create new a password question*

1. In the header, click  (**Profile**) > **Profile**.
2. On the **Profile Settings** page click the **Password Questions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Password Questions** tab, click **Create password question**.
5. In the **Create Password Question** pane, enter the following:
  - **Question:** Enter your question.
  - **Answer:** Enter the answer to your question (above).
  - **Repeat answer:** Enter the answer to your question again.
6. Click **Save**.

# Editing password questions

You can edit existing password questions.

### *To edit a password question*


1. In the header, click  (**Profile**) > **Profile**.
2. On the **Profile Settings** page click the **Password Questions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. In the **Password Questions** tab, click the password question you want to edit.
5. Click **Edit**.
6. Specify the following:
  - **Question:** Enter your question.
  - **Answer:** Enter the answer to your question (above).

- **Repeat answer:** Enter the answer to your question again.
7. Click **Save**.

## Deleting password questions

You can delete existing password questions.

### *To delete a password question*

1. In the header, click  (**Profile**) > **Profile**.
2. On the **Profile Settings** page click the **Password Questions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Password Questions** tab, click the password question you want to delete.
5. Click **Delete**.
6. In the **Delete password question** dialog, confirm the prompt with **Yes**.

## Changing passwords

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 a few steps:

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

### **Step 1: Log in to the Password Reset Portal**

Log in to the Password Reset Portal using a passcode, by answering your password questions, or with your current password (see [Logging in to the Password Reset Portal](#) on page 15).

### **Step 2: Change password**

After you have logged in on the Password Reset Portal (see [Step 1: Log in to the Password Reset Portal](#) on page 22), you can change your central password or the passwords of user accounts to which you have access.

### ***To assign a new password for your personal user account or another user account***

1. On the home page, in the **Passwords** tile, click **Manage passwords**.
2. On the **Manage My Passwords** page, click **Set new password** next to the user account you want to give a new password to.
3. In the **Set New Password** pane, in the **New password** field, enter the password you wish to use.
4. In the **Repeat the password** field, enter the password again.
5. Click **Save**.

### ***To change the central password***

1. On the home page, in the **Passwords** tile, click **Manage passwords**.
2. On the **Manage My Passwords** page, next to **Central password**, click **Set new password**.
3. In the **Set New Password** pane, in the **New password** field, enter the password you wish to use.
4. In the **Repeat the password** field, enter the password again.
5. Click **Save**.

The central password is reset.

### **Related topics**


- [Managing password questions](#) on page 20

## **Editing your profile 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  **(Profile) > Profile**.
2. On the **Profile Settings** page, click the **Password Questions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.  
**| NOTE:** Changes to your contact data only affects the selected identity.
4. Edit the entries in the various fields.
5. (Optional) To change your profile picture, perform the following actions:


- a. Click **Add/Change**.
  - b. Select an image from your medium.
6. Click **Save**.

## Switching languages

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

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

### *To change the language of the Web Portal*

1. In the header, click  (**Profile**) > **Profile**.
2. On the **Profile Settings** page, click the **Password Questions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. In the **Language** menu, select the language that you want to use for the Web Portal.
5. In the **Language for value formatting** menu, 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 US format MM/DD/JJJJ (**12/24/2020**).

6. Click **Save**.

## Enabling/disabling email notifications

You can define which events you would like to be notified about by email.

### *To enable/disable email notifications*

1. In the header, click  (**Profile**) > **My profile**.
2. On the **Profile Settings** page, click the **Email Notifications** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Email Notifications** tab, perform one of the following actions:
  - To enable notifications, select the check box next to the event that you want to notified about.
  - To disable notifications, deselect the box next to the event that you do not want to notified about any longer.
5. Click **Save**.



# Report subscriptions management

Web Portal provides several reports that present information about objects and their relations to other objects in the database. Identification, analysis, and summaries of relevant data are supported with the help of these reports.

You can subscribe to reports in the Web Portal in order to receive them on a regular basis. These subscriptions can be managed by you.


## Detailed information about this topic

- [Subscribing to reports](#) on page 25
- [Editing report subscriptions](#) on page 26
- [Sending reports from report subscriptions](#) on page 27
- [Unsubscribing reports](#) on page 27

## Subscribing to reports

You can subscribe to reports. These reports are regularly sent by email to you and any other subscribers.

### To add a subscription

1. In the header, click  (**Profile**) > **My profile**.
2. On the **Profile Settings** page, click the **Report Subscriptions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Report Subscriptions** tab, click **Add subscription**.  
On the **Report Subscriptions** page, click **Add subscription**.
5. In the **Add Report Subscription** pane, in the list, click the report that you want to subscribe to.  

**TIP:** To search for a specific report, in the **Search** field, enter the name of the report.
6. Click **Next**.
7. In the **Configure subscription** step, specify the following subscription settings:
  - **Subscription:** Enter the subscription's name.
  - **Schedule:** Select how often you want to receive the report (once a week, for example).
  - **Format (email attachment):** Select which format you want to receive the report in. The report is sent in this format as a file attachment in an email.

- **Parameter:** (Optional) Specify other report specific settings. These settings might vary depending on what report you use.
8. Click **Next**.
  9. In the **Add additional subscribers** step, in the **Additional subscribers** list, click the identities that will also receive this report.
 


**TIP:** To search for a specific identity, in the **Search** field, enter the name of the identity.

**TIP:** To remove a subscriber, in the **Selected subscribers** list, click **✕ (Remove)** next to the corresponding identity. To remove all subscribers, in the **Selected subscribers** list, click **Remove all**.
  10. Click **Next**.
  11. In the **Check and create subscription** step, check your data and change them if necessary by clicking on the respective step.
  12. Click **Create**.

## Editing report subscriptions

You can edit your existing report subscriptions.

### *To edit a report subscription*

1. In the header, click  (**Profile**) > **My profile**.
2. On the **Profile Settings** page, click the **Report Subscriptions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Report Subscriptions** page, click **Edit** next to the report subscription that you want to edit.
5. In the details pane, under **Subscription Details**, edit the following report subscription settings:
  - **Subscription:** Enter the report subscription's name.
  - **Report:** Select the report that you want to subscribe to.
  - **Schedule:** Select how often you want to receive the report (once a week, for example).
  - **Format (email attachment):** Select which format you want to receive the report in. The report is sent in this format as a file attachment in an email.
  - **Additional subscribers:** Click **Assign/Change**, select the check box next to the identity who will also receive this report and click **Apply**.
 




**TIP:** To remove a subscription, deselect the box next to the corresponding identity. To remove all subscriptions, click **Clear selection**. Click **Apply**.

6. (Optional) In the details pane under **Parameter**, specify any other report specific settings. These settings might vary depending on what report you use.
7. Click **Save**.

## Sending reports from report subscriptions

Depending on how the schedule is configured, you can send reports to yourself and to others.



### *To send a report*

1. In the header, click  (**Profile**) > **My profile**.
2. On the **Profile Settings** page, click the **Report Subscriptions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Report Subscriptions** tab, perform the following:  
On the **Report Subscriptions** page, perform the following:
  - To send the report to yourself, click  (**Actions**) > **Send report to me** next to the subscription of the report that you want to send.
  - To send the report to all subscribers, click  (**Actions**) > **Send report to all subscribers** next to the subscription of the report you want to send.

## Unsubscribing reports

You can unsubscribe reports.

### *To unsubscribe a report*

1. In the header, click  (**Profile**) > **My profile**.
2. On the **Profile Settings** page, click the **Report Subscriptions** tab.
3. (Optional) If you have other subidentities besides your main identity, you can select identities from the **Identity** menu.
4. On the **Report Subscriptions** tab, click  (**Actions**) > **Unsubscribe** next to the report subscription that you want to end.
5. In the **Unsubscribe Report** dialog, confirm the prompt with **OK**.

## 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 sections from here.

## Top – menu bar

The [menu bar](#) is displayed horizontally in the upper part of the screen and provides different menus and submenus.

## Work area

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

## Detailed information about this topic

- [Home](#) on page 28
- [Header](#) on page 28
- [Menu bar](#) on page 29

# Home

Open the home page by clicking the company logo.


Once you have logged in successfully, the home page appears. Displayed across the home page, there are tiles of different sizes that 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 the relevant button.


# Header

There are several buttons available to you in the Web Portal's header bar that 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 6: Functions in the header**

	Use these menu items to:
Profile	<ul style="list-style-type: none"><li>• View your personal data with memberships, responsibilities, and entitlements and to edit setting (for example, your <a href="#">Password questions</a>)</li><li>• <a href="#">Display</a> your company's address book</li></ul>

- 
- [Log off](#)
  - [Change](#) the language
  - [Enable/disable](#) email notifications
  - [Manage](#) report subscriptions
- 

 **Help** This menu includes [online help](#), contact to customer service and information about the connection and the product.

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

Here you can [open](#) the help. The help contains the entire contents of the Web Portal User Guide.

---

## 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 that are respective subtopics.

### ***To open a menu***

1. Click a menu in the menu bar.  
This expands the menu and shows more menu items.
2. Click a menu item.

## Requests

Requests account for the core functionality of the Web Portal. For example, if you require access to a system or device, request it as though you were using a traditional web shop.

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

You can apply the following requests:

- Groups (for example, Active Directory groups, Notes groups, LDAP groups, and more)
- Membership in roles (for example, business roles, departments, application roles, applications, and more)
- Access to file systems or SharePoint resources
- Every other resource in your area

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

- Your request is forwarded to an identity for approval (see [Pending requests](#) on page 69).
- You are notified whether your request is granted or denied.

### Detailed information about this topic

- [Setting up and configuring request functions](#) on page 31
- [Requesting products](#) on page 50
- [Saved for Later list](#) on page 66
- [Pending requests](#) on page 69
- [Displaying request history](#) on page 79
- [Canceling requests](#) on page 79
- [Renewing products with limit validity periods](#) on page 80
- [Unsubscribing products](#) on page 81
- [Displaying approvals](#) on page 83

# Setting up and configuring request functions

In order to request products in the Web Portal, the Web Portal must be set up accordingly. Application roles help you to define who can take over administrative tasks in the Web Portal.

## Structure and workflow of requests

A shop is the top element in the hierarchical structure that is required for requesting products. A shop can contain several shelves. Products are assigned to these shelves and can then be requested.

Products can be grouped into service categories. Identities can select products from a service catalog in the Web Portal, add them to a cart, and submit a purchase request.

Requests follow a defined approval process that determines whether a product may be assigned or not. Authorized identities have the option to approve requests and cancellations. You determine which approval process to use by assigning approval policies to shops or shelves (see [You can edit details of existing shops](#) on page 33 and [Editing shelf details](#) on page 37).

## Detailed information about this topic

- [Managing shops](#) on page 31

## Managing shops

A shop is the top element in the hierarchical structure that is required for requesting products.

A shop can contain several shelves (see [Managing shop shelves](#) on page 35). Products are assigned to these shelves and can then be requested (see [Managing requestable products in shops](#) on page 40).

You can display, create, edit, or delete shops.

You can also decide who is able to request products from shops (see [Managing access to requestable products in shops](#) on page 38).

## Detailed information about this topic

- [Displaying shops](#) on page 32
- [Creating shops](#) on page 32
- [Editing shops](#) on page 33

- [Deleting shops](#) on page 34
- [Managing shop shelves](#) on page 35
- [Managing access to requestable products in shops](#) on page 38
- [Managing requestable products in shops](#) on page 40

## Displaying shops

You can display any of the shops and their details.

### *To display shops*

1. In the menu bar click **Setup > Shops**.  
This opens the **Shops** page.
2. (Optional) To display details of a shop, in the list, click on the shop.
3. (Optional) You can perform the following actions:
  - You can see the shop's shelves (see [You can display any of the shop's shelves and their details](#) on page 35).
  - You can display who can request products from the shop (see [You can display the members of shops. These members can request products from the respective shop](#) on page 38).

## Creating shops

To set up your own shop solution, you can create shops. You can then customize these shops as you wish (see [Editing shops](#) on page 33).

### *To create a shop*

1. In the menu bar click **Setup > Shops**.
2. On the Shops page click **Create Shop**.
3. In the **Create Shop** pane, enter the main data for the new shop.

**Table 7: Shop main data**

Property	Description
Name	Enter a full, descriptive name for the shop.
Description	Enter a description for the shop.
Attestors	Click <b>Assign/Change</b> and select an application role. Members of this application role can approve attestation cases affecting products that



Property	Description
	<p>can be requested through this shop.</p> <p>This setting is inherited by all the shelves that are assigned to this shop and do not have an attestor.</p>
Approval policies	<p>Click <b>Assign/Change</b> and select the check boxes in front of the approval policies used to determine the approvers if products are requested from this shop in the Web Portal. Click <b>Apply</b>.</p> <p>This setting is inherited by all the shelves that are assigned to this shop and do not have any approval policies.</p>
Owner	<p>Select the identity that is responsible for the shelf.</p> <p>The owner can be used as the approver in approval processes for requests from the shop.</p>
2nd Manager	<p>Select the identity that deputizes as the shop manager.</p> <p>The deputy can be used as the approver in approval processes for requests from the shop.</p>

4. Click **Create**.
5. (Optional) Create shelves for the shop (see [You can create shelves for shops and identities can request system entitlements from them.](#) on page 35). In the shelves, you can specify which products can be requested from the shop (see [Adding products to shelves](#) on page 40).
6. (Optional) To specify who can request products from the shop, add members to the shop (see [You can add members to shops. These identities can then request products from the respective shop.](#) on page 38).

## Editing shops

When you edit existing shops, you can perform the following actions:

- Edit shop details (see [You can edit details of existing shops.](#) on page 33)
- Manage shop shelves (see [Managing shop shelves](#) on page 35)
- Specify who can request products from shops (see [Managing access to requestable products in shops](#) on page 38)
- Specify which products can be requested from shops (see [Managing requestable products in shops](#) on page 40)

## Editing shop details

You can edit details of existing shops.

### To edit details of a shop

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose details you want to edit.
3. In the **Edit Shop** pane, you can edit the main data of the shop.

**Table 8: Shop main data**

Property	Description
Name	Enter a full, descriptive name for the shop.
Description	Enter a description for the shop.
Attestors	<p>Click <b>Assign/Change</b> and select an application role. Members of this application role can approve attestation cases affecting products that can be requested through this shop.</p> <p>This setting is inherited by all the shelves that are assigned to this shop and do not have an attestor.</p>
Approval policies	<p>Click <b>Assign/Change</b> and select the check boxes in front of the approval policies used to determine the approvers if products are requested from this shop in the Web Portal. Click <b>Apply</b>.</p> <p>This setting is inherited by all the shelves that are assigned to this shop and do not have any approval policies.</p>
Owner	<p>Select the identity that is responsible for the shelf.</p> <p>The owner can be used as the approver in approval processes for requests from the shop.</p>
2nd Manager	<p>Select the identity that deputizes as the shop manager.</p> <p>The deputy can be used as the approver in approval processes for requests from the shop.</p>

4. Click **Save**.

## Deleting shops

You can delete shops.

**NOTE:** Before you can delete a shop, you must delete all shelves from the shop (see [You can delete shops](#). on page 37) and remove all members from the shop (see [You can remove members from shops. These identities can then no longer request products from the shop](#). on page 39).

### ***To delete a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop you want to delete.
3. In the **Edit Shop** pane, click **Delete Shop**.

## **Managing shop shelves**

You can display, create, edit, or delete shop shelves.

Each shop contains a number of shelves from which identities can request products. There are various products available for request on shelves. Shelves are set up under each shop.

### **Detailed information about this topic**

- [You can display any of the shop's shelves and their details.](#) on page 35
- [You can create shelves for shops and identities can request system entitlements from them.](#) on page 35
- [When you edit the existing shelves of a shop, you can perform the following actions:](#) on page 36
- [Editing shelf details](#) on page 37
- [You can delete shops.](#) on page 37

## **Displaying shop shelves**

You can display any of the shop's shelves and their details.

You can display any of the shop's shelves and their details.

### ***To display the shelves in a store***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose shelves you want to display.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. (Optional) To display details of a shelf, click it in the list.
5. (Optional) You can display the products that can be requested over this shelf (see [Displaying requestable products](#) on page 40).

## **Creating shelves for shops**

You can create shelves for shops and identities can request system entitlements from them.

### To create a shelf for shop

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop you want to create a shelf for.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. On the **Shelves** tab, click **Create shelf**.
5. In the **Create Shelf** pane, enter the main data for the new shelf.

**Table 9: Shelves main data**

Property	Description
Name	Enter a full, descriptive name for the shelf.
Description	Enter a description for the shelf.
Attestors	<p>Click <b>Assign/Change</b> and select an application role. Members of this application role can approve attestation cases affecting products that can be requested over this shelf.</p> <p>This setting is inherited by all the products that are assigned to this shelf and do not have an attestor.</p>
Approval policies	<p>Click <b>Assign/Change</b> and select the approval policies that control how approvers are determined if products are requested from this shelf in the Web Portal.</p> <p>This setting is inherited by all the products that are assigned to this shop and do not have any approval policies.</p>
Owner	<p>Select the identity that is responsible for the shelf.</p> <p>The owner can be used as the approver in approval processes for off the shelf requests.</p>
Deputy manager	<p>Select the identity that deputizes for the shelf manager.</p> <p>The deputy can be used as the approver in approval processes for off the shelf requests.</p>

6. Click **Create**.
7. (Optional) To specify which products can be requested from the shelf, add the corresponding products to the shelf (see [Adding products to shelves](#) on page 40).

## Editing shop shelves

When you edit the existing shelves of a shop, you can perform the following actions:

- Edit shelf details (see [You can edit details of existing shops](#) on page 33)
- Specify which products can be requested from shops (see [Managing requestable products in shops](#) on page 40)

## Editing shelf details

You can edit details of existing shelves.

### *To edit details of a shelf*

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose shelf you want to edit.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. On the **Shelf** tab, in the list, click the shelf you want to edit.
5. In the **Edit shelf** pane, you can edit the main data of the shelf.

**Table 10: Shelves main data**

Property	Description
Name	Enter a full, descriptive name for the shelf.
Description	Enter a description for the shelf.
Attestors	<p>Click <b>Assign/Change</b> and select an application role. Members of this application role can approve attestation cases affecting products that can be requested over this shelf.</p> <p>This setting is inherited by all the products that are assigned to this shelf and do not have an attestor.</p>
Approval policies	<p>Click <b>Assign/Change</b> and select the approval policies that control how approvers are determined if products are requested from this shelf in the Web Portal.</p> <p>This setting is inherited by all the products that are assigned to this shop and do not have any approval policies.</p>
Owner	<p>Select the identity that is responsible for the shelf.</p> <p>The owner can be used as the approver in approval processes for off the shelf requests.</p>
Deputy manager	<p>Select the identity that deputizes for the shelf manager.</p> <p>The deputy can be used as the approver in approval processes for off the shelf requests.</p>

6. Click **Save**.

## Related topics

- [Managing requestable products in shops](#) on page 40

## Deleting shelves from shops

You can delete shops.

**NOTE:** Before you can delete a shelf, you must remove all the products from it (see [Removing products from shelves](#) on page 41).

#### ***To delete a shelf from a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose shelf you want to delete.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. On the **Shelves** tab, in the list, click the shelf you want to delete.
5. In the **Edit shelf** pane, click **Delete shelf**.

## **Managing access to requestable products in shops**

You can define who can request products from shops. This you specify through memberships in the shop. Once an identity becomes a member of a shop, it can request products from the shop.

#### **Detailed information about this topic**

- [You can display the members of shops. These members can request products from the respective shop.](#) on page 38
- [You can add members to shops. These identities can then request products from the respective shop.](#) on page 38
- [You can remove members from shops. These identities can then no longer request products from the shop.](#) on page 39

## **Displaying shop members**

You can display the members of shops. These members can request products from the respective shop.

#### ***To display members of a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose members you want to display.
3. In the **Edit Shop** pane, click the **Access** tab.

## **Adding members to shops**

You can add members to shops. These identities can then request products from the respective shop.

### ***To add a member to a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the Shop you want to add a member to.
3. In the **Edit Shop** pane, click the **Access** tab.
4. On the **Access** tab, click **Add members**.
5. In the **Add members** dialog, select the check box in front of the identity that you want to add to the shop as a member.
6. Click **Apply**.

### ***To add excluded members back into a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the Shop you want to add a member to.
3. In the **Edit Shop** pane, click the **Access** tab.
4. On the **Access** tab, click **Excluded members**.
5. Select the check box in front of the identity that you want to add to the shop as a member.
6. Click **Remove exclusion**.

## **Removing members from shops**

You can remove members from shops. These identities can then no longer request products from the shop.

**NOTE:** You can exclude members who have been added to the shop through a dynamic role. You can add these excluded members back to the shop later (see [You can add members to shops. These identities can then request products from the respective shop.](#) on page 38). For more information about dynamic roles, see the *One Identity Manager Identity Management Base Module Administration Guide*.

### ***To remove a member from a shop***

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the Shop from which you want to remove a member.
3. In the **Edit Shop** pane, click the **Access** tab.
4. On the **Access** tab, in the list, select the check box next to the identity that you want to remove as a member.
5. Click **Remove**.
6. (Optional) If the member was assigned to the shop through a dynamic role, perform the following actions:

- a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
- b. Click **Exclude members**.

## Managing requestable products in shops

You can decide which products can be requested from shops. Once products have been allocated to shelves in a shop (see [Making system entitlements requestable](#) on page 189) and labeled as requestable , they can be requested in the Web Portal by members of the shop.

### Detailed information about this topic

- [Displaying requestable products](#) on page 40
- [Adding products to shelves](#) on page 40
- [Removing products from shelves](#) on page 41

## Displaying requestable products

You can display which products can be request from shops shelves.

### *To display a shelf's requestable products*

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop whose requestable products you want to display.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. On the **Shelves** tab, in the list, click the shelf with the requestable products you want to display.
5. In the **Edit shelf** pane, click the **Products** tab.

## Adding products to shelves

You can add products to shelves. Once products have been allocated to the shelves of a shop, they can be requested in the Web Portal by members of the shop.

### *To add a product to a shelf*

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop that you want request the product from later.
3. In the **Edit Shop** pane, click the **Shelves** tab.



4. On the **Shelves** tab, in the list, click the shelf you want to add the product to.
5. In the **Edit shelf** pane, click the **Products** tab.
6. On the **Products** tab, click **Add products**.
7. In the **Add Products** dialog, select the type of product you want to add from the menu.
8. Select the check box in front of the product that you want to add to the shelf.
9. Click **Apply**.

## Removing products from shelves

You can remove products from shelves, after which they can no longer be requested from the shelves.

### *To remove a product from a shelf*

1. In the menu bar click **Setup > Shops**.
2. On the **Shops** page, in the list, click the shop from whose shelf you want to remove the product.
3. In the **Edit Shop** pane, click the **Shelves** tab.
4. On the **Shelves** tab, in the list, click the shelf to remove the product from.
5. In the **Edit shelf** pane, click the **Products** tab.
6. On the **Products** tab, select the check box in front of the product that you want to remove from the shelf.
7. Click **Remove**.

## Managing service categories

Use the Web Portal to display and edit service categories.

Service categories are used to group products. For example, you can use service categories to group together products by topic.

You can assign the product's service items to these service categories (see [Editing system entitlement service items](#) on page 196).

### Detailed information about this topic

- [Displaying service categories](#) on page 42
- [Creating service categories](#) on page 42
- [Editing service categories](#) on page 44
- [Deleting service categories](#) on page 46

## Displaying service categories

You can display any of the service categories and their details.

### *To display service categories*

1. In the menu bar, click **Setup > Service categories**.  
This opens the **Service Categories** page and displays all the service categories.
2. (Optional) To display the details of a service category, next to the service category, click **Edit**.

## Creating service categories

You can create service categories.

### *To create a service category*

1. In the menu bar, click **Setup > Service categories**.
2. On the **Service Categories** page, click **Create service category**.

3. In the **Create Service Category** pane, enter the service category's main data.

**Table 11: Service category main data**

Property	Description
Service category	Enter a full, descriptive name for the service category.
Description	Enter a description for the service category.
Parent service category	To structure service categories hierarchically, click <b>Assign/Change</b> and then select the parent service category.
Attestors	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service category.
Product owners	Click <b>Assign/Change</b> and then select an application role. Members of this application role can edit the service category's main data. They can also be used as approvers in approval processes when requests for service items assigned to this service category.
Approval policies	Select the approval policy used to determine the approver when the service item is requested in the Web Portal.  <b>NOTE:</b> The approval policy specified for a service category is inherited by all associated service items and all child service categories where this is not specified.
Sort order	Enter the way you want the service category's service items to be sorted.
Picture	Add a picture of the service category. Users see this picture when they make a request. If you do not insert a picture here, the picture of the assigned service category is used.  Perform the following actions to do this: <ol style="list-style-type: none"><li>1. Click <b>Add/Change</b>.</li><li>2. Select an image from your medium.</li></ol>
Application	To assign an application to a service category, select the application.
Service items	Specify the products can be requested through the service category. Perform the following actions as well: <ol style="list-style-type: none"><li>1. Click <b>Assign/Change</b>.</li><li>2. Select the check box in front of the service item you want to assign to the service category.</li></ol>

Property	Description
	<p><b>TIP:</b> To remove a service item, deselect the relevant check box in front of the service item. To remove all service items, click <b>Clear selection</b>.</p> <p>3. Click <b>Apply</b>.</p>

4. Click **Save**.

## Editing service categories

You can edit service items.

### *To edit a service category*

1. In the menu bar, click **Setup > Service categories**.
2. On the **Service Categories** page, next to the service category you want to edit, click **Edit**.

3. In the **Edit Service Category** pane, enter the service category's main data.

**Table 12: Service category main data**

Property	Description
Service category	Enter a full, descriptive name for the service category.
Description	Enter a description for the service category.
Parent service category	To structure service categories hierarchically, click <b>Assign/Change</b> and then select the parent service category.
Attestors	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service category.
Product owners	Click <b>Assign/Change</b> and then select an application role. Members of this application role can edit the service category's main data. They can also be used as approvers in approval processes when requests for service items assigned to this service category.
Approval policies	Select the approval policy used to determine the approver when the service item is requested in the Web Portal.  <b>NOTE:</b> The approval policy specified for a service category is inherited by all associated service items and all child service categories where this is not specified.
Sort order	Enter the way you want the service category's service items to be sorted.
Picture	Add a picture of the service category. Users see this picture when they make a request. If you do not insert a picture here, the picture of the assigned service category is used.  Perform the following actions to do this: <ol style="list-style-type: none"><li>1. Click <b>Add/Change</b>.</li><li>2. Select an image from your medium.</li></ol>
Application	To assign an application to a service category, select the application.
Service items	Specify the products can be requested through the service category. Perform the following actions as well: <ol style="list-style-type: none"><li>1. Click <b>Assign/Change</b>.</li><li>2. Select the check box in front of the service item you want to assign to the service category.</li></ol>

Property	Description
	<p><b>TIP:</b> To remove a service item, deselect the relevant check box in front of the service item. To remove all service items, click <b>Clear selection</b>.</p> <p>3. Click <b>Apply</b>.</p>

4. Click **Save**.

## Deleting service categories

You can delete existing service categories.

Before you can delete a service category, the following requirements must be met:

- The service category is not predefined. Whether a service category is predefined, you can see from the description (see [Displaying service categories](#) on page 42).
- Service items are no longer assigned to the service category. To remove service items, edit the service category and remove the assigned service items (see [Editing service categories](#) on page 44).
- There are no longer child service categories under the service category. To assign child service categories under another service category or to remove them again, edit the corresponding child service category and remove or change the parent service category (see [Editing service categories](#) on page 44).

### To delete a service category

1. In the menu bar, click **Setup > Service categories**.
2. On the **Service Categories** page, next to the service category you want to delete, click **Edit**.
3. In the **Edit Service Category** pane, click **Delete service category**.
4. In the **Delete Service Category** dialog, confirm the prompt with **Yes**.

## Managing service items

Use the Web Portal to display and edit service items.

In order to request company resources in the Web Portal, a service item must be assigned to them. Service items contain additional information about company resources (for example, article number, request properties, product manager or approver for requests).

## Detailed information about this topic

- [Managing my system entitlements' service items](#) on page 161
- [Managing service items for system entitlements](#) on page 193
- [Displaying service items](#) on page 47
- [Editing service items](#) on page 47

## Displaying service items

You can display all service items.

### *To display all service items*

1. In the menu bar, click **Setup > Service items**.  
This opens the **Service Items** page and displays all the service items.
2. (Optional) To display details of a service item, next to the service item, click **Edit**.

## Editing service items

You can display all service items.

### *To display all service items*

1. In the menu bar, click **Setup > Service items**.
2. On the **Service Items** page, next to the service item, click **Edit**.
3. In the **Service Item** pane, edit the service item's main data.

**Table 13: Main data of system entitlement service items**

Property	Description
Service item	Enter a name for the service item.
Description	Enter a description of the service item.
Service category	You can group different service items into service categories. To do this, click <b>Assign/Change</b> and select the service category to which you want to assign the service item. For more information about service categories, see <a href="#">Managing service categories</a> on page 41.
Approval policy	Select the approval policy used to determine the approver when the service item is requested in the Web

Property	Description
	Portal.
Max. days valid	<p>Specify how long an identity can keep the product until it is automatically unsubscribed again.</p> <p>An identity keeps their requested products on the shelf until they unsubscribe from them themselves. Sometimes, however, products are only required for a certain length of time and can be canceled automatically after this time. Products that are intended to have a limited shelf life need to be marked with a validity period.</p>
Web page	<p>Specify the URL of a web page that contains more information about the product. Use the following format: <b>https://www.example.com</b> or <b>http://www.example.com</b>.</p> <p>This field allows you to link product descriptions in the internet or intranet to the service item.</p>
Sort order	Specify how the service category is sorted.
Request property	<p>Select the request property using the additional request parameters that are defined for a request. If you do not select any request properties, the request properties of the associated service category are used.</p> <p>Requests can be given additional information though product-specific request properties such as the specific details of a product, its size, or color. A request property gathers all additional features together that can be given when requesting a product.</p>
Functional area	<p>Click <b>Assign/Change</b> and then select the functional area to which you want to assign the service item.</p> <p>You can use One Identity Manager to assess the risk of assignments. The assessments can be evaluated separately by functional area. To do this, service items must be assigned to functional areas. For more information, see the <i>One Identity Manager Risk Assessment Administration Guide</i>.</p>
Attestor	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service item.
Terms of use	Select the terms of use that the product's requester must accept.



Property	Description
Picture	<p>Enter a picture for the service item. Users see this picture when they make a request.</p> <p>Perform the following actions as well:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add/Change</b>.</li> <li>2. Select an image from your medium.</li> </ol>
Request parameters must be defined per recipient	<p>Select the check box to enter additional request properties separately for each recipient of this product, if the product is requested for different recipients in one request procedure.</p>
Retain service item assignment on relocation	<p>Select the check box if requests for this service item are retained when a customer or the product is moved.</p> <p>If an identity requests a product from a Shop and changes the Shop at a later date, a decision must be made about how to proceed with the existing request. The same applies if a product is moved to another shelf.</p>
Tags	<p>Enter tags for the product. These tags can be used as search criteria by requests in the Web Portal.</p>
Not requestable/Requestable	<p>Set the switch to <b>Requestable</b> if you want to request system entitlements through the Web Portal.</p> <p>Set the switch to <b>Not requestable</b> if you do not want to request system entitlements through the Web Portal.</p> <p>For more information, see <a href="#">Making system entitlements requestable</a> on page 189.</p>
Product owner	<p>Product owners can edit service item's main data and, be included in approval procedures as approvers for requests of this service item.</p> <p>Specify which identities are responsible for the service item.</p> <ul style="list-style-type: none"> <li>• To specify members of a specific application role as product owners, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>1. Enable the <b>Select from roles</b> option.</li> <li>2. In the <b>Product owner</b> field, click <b>Assign/Change</b>.</li> <li>3. In the <b>Edit Product Owner</b> pane, click the appropriate application role.</li> </ol> </li> <li>• To specify a specific identity as the product owner,</li> </ul>

Property	Description
	<p>perform the following under <b>Product owners</b>:</p> <ol style="list-style-type: none"> <li>1. Enable the <b>Select from identities</b> option.</li> <li>2. In the <b>Identity</b> list, select the corresponding identity.</li> </ol>

4. Click **Save**.

## Requesting products

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 a request for other identities in their name.

You can complete a request in three steps:

1. Add the desired product to your shopping cart (see [Adding products to the shopping cart](#) on page 50).
2. Verify the shopping cart and amend the product requests as required (see [Managing products in the shopping cart](#) on page 52).
3. Submit the request (see [Submitting requests](#) on page 57).

### Detailed information about this topic

- [Adding products to the shopping cart](#) on page 50
- [Managing products in the shopping cart](#) on page 52
- [Submitting requests](#) on page 57
- [Requesting products on the Saved for Later list](#) on page 67
- [Displaying and requesting other identity's products](#) on page 59
- [Requesting for other identities or subidentities](#) on page 58
- [Requesting privileged access](#) on page 60
- [Requests for Active Directory groups](#) on page 62

## Adding products to the shopping cart

To request products, first you must select them and add them to your shopping cart.


## To add products to the shopping cart

1. In the menu bar, click **Requests > New request**.

This opens the **New Request** page and displays all the available products.

2. (Optional) To filter which products are displayed, perform one of the following actions:
  - In the search field, enter the name of a product you want to look for.
  - Click **Show products from service category** and then select the service category containing the products you want to display.


The relevant products are displayed.

**TIP:** To change the service category you have selected, click  (**Delete filter**) next to the selected service category and then select another service category using **Show products from service category**.

If the service category contains a child category, select the child category you want from the **Service items in the category** menu.


To summarize the main and child categories in a list, enable the **Include child categories** option.

3. Perform one of the following tasks:

- In the tile view ()
  - Add a product to the shopping cart: On the tile with the product you want to request, click **Add to cart**.
  - Add multiple products to the shopping cart: Click the tile with the products you want to request and click **Add to cart** below the list.

**TIP:** To select all the displayed products, next to **Selected products**, click **Select all on page**.

To remove the product selection, next to **Selected products**, click **Deselect all**.

- In the list view ()
  - Add a product to the shopping cart: Next to the product with the product you want to request, click **Add to cart**.
  - Add multiple products to the shopping cart: Select the check boxes next to the products you want to request and click **Add to cart** below the list.

**TIP:** If you select a product that has dependent products, a dialog opens that allows you to request these products as well.

**NOTE:** If you select a product that requires additional information, a corresponding dialog opens.

This opens the **Shopping Cart** page. Now, you can check the request and, if necessary, add to each product request (see [Managing products in the shopping cart](#) on page 52). Then send the request (see [Submitting requests](#) on page 57).

Or you can continue working in the Web Portal to do things such as add more products.

## Related topics

- [Managing products in the shopping cart](#) on page 52
- [Submitting requests](#) on page 57

# Managing products in the shopping cart

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can delete individual product requests from the cart, add more details to them, or perform other actions.

**NOTE:** In certain circumstances, you may cause a request to violate compliance rules if it allocates a specific entitlement to a business role. For example, an identity may obtain an unauthorized entitlement through this business role. In this case, the compliance violation is displayed in the details pane of the shopping cart.

## *To manage products in the shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, edit the shopping cart.  
You can perform the following actions:
  - Remove products from the shopping cart (see [Removing products from the shopping cart](#) on page 53)
  - Define the validity of the products (see [Setting the validity period of products in your shopping cart](#) on page 54)
  - Change the priority of the requests (see [Specifying the priority of products in your shopping cart](#) on page 55)
  - Enter reasons for the requests (see [Giving reasons for requests](#) on page 55)
  - Check the shopping cart for invalid products and remove them (see [Checking the shopping cart](#) on page 56)
  - Request products for multiple identities (see [Requesting products in the shopping cart for multiple identities](#) on page 56)
  - Place products on the Saved for Later list (see [Saving products for later](#) on page 66)
  - Show the Saved for Later list (see [Displaying Saved for Later list](#) on page 67)
3. Ensure you only have requests that you really want to submit in your cart.  
Now you can send your request (see [Submitting requests](#) on page 57).

## Related topics

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57
- [Saved for Later list](#) on page 66

## Displaying the shopping cart

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can view all the products in your shopping cart along with their details.

### *To display the products in your shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.  
This opens the **Shopping Cart** page.
2. Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

### Related topics

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

## Removing products from the shopping cart

After adding added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can remove them again.

### *To remove products from the shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **Remove from cart** next to the product that you do not want to request anymore.
3. In the **Remove Product From Cart** dialog, confirm the prompt with **Yes**.  
Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

### *To remove multiple products from the shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, in the list, select the check boxes next to the products that you do not want to request anymore.
3. Click **⋮ (Actions) > Remove selected**.
4. In the **Remove Selected Products From Cart** dialog, confirm the prompt with **Yes**.  
Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

### ***To remove all products from the shopping cart***

- Delete the shopping cart. For more information, see [Deleting shopping carts](#) on page 57.

### **Related topics**

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

## **Setting the validity period of products in your shopping cart**

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can set their validity period. Once a product's validity period has expired, it can no longer be used.

**NOTE:** If you alter the validity period, the request's validity is determined by this information and not from the date of approval. An additional message is shown in the details pane of the respective product. If the request approval validity period has expired, the request is annulled.

**TIP:** You can renew the validity of a currently assigned product. For more information, see [Renewing products with limit validity periods](#) on page 80.

### ***To set the validity period of a product in the shopping cart***

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, in the list, click **Edit** next to the product whose validity period you want define.
3. In the details pane, in the **Valid from** field, specify from when the product is valid.
4. In the **Valid until** field, specify until when the product is valid.
5. Click **Save**.

Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

### **Related topics**

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

# Specifying the priority of products in your shopping cart

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can specify their priority. The priority allows approvers to quickly identify how important a product request is.

## *To specify the priority of a product in the shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **Edit** next to the product whose priority you want define.
3. In the details pane, in the **Priority** menu, select the priority.
4. Click **Save**.

Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

## Related topics

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

# Giving reasons for requests

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can give reasons for requesting them. A reason can help approvers make their approval decisions.

## *To give a reason for requesting a product from the shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **Edit** next to the product with the request you want to justify.
3. In the details pane, in the **Reason** field, enter your reason for requesting this product.
4. Click **Save**.

Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

## Related topics

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

## Checking the shopping cart

When you send a request, it is automatically checked to see if it contains invalid products. You can also [run](#) this check before you submit the request. If necessary, you will be shown why specific product requests are invalid.

### *To check your shopping cart for invalid products*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - Click **⋮ (Actions) > Check shopping cart**.
  - Click **Submit**.

| **NOTE:** If the check is successful, the request can be submitted.

If invalid products are found, an appropriate message appears in the **Check result** column next to the invalid product.

3. In the list, click **Error** next to the invalid product.

In the details pane, the relevant message is displayed that gives you precise information about why you cannot request the product.

### Related topics

- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

## Requesting products in the shopping cart for multiple identities

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), you can request the products in your shopping cart for other identities as well.

### *To request a product in the shopping cart for multiple identities*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **Edit** next to the product that you want to request for other identities.
3. In the details pane, click **Actions > Request for multiple identities**.
4. In the **Request for Multiple Identities** pane, select the check boxes next to the identities you want to request the product for.
5. Click **Apply**.
6. Close the details pane.



Now you can [add](#) more products to your shopping cart, [set](#) additional options for products in the shopping cart, or [submit](#) the request.

## Related topics

- [Requesting for other identities or subidentities](#) on page 58
- [Adding products to the shopping cart](#) on page 50
- [Submitting requests](#) on page 57

## Deleting shopping carts

You can clear your shopping cart at any time.

### *To delete your shopping cart*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **⋮ (Actions) > Delete shopping cart**.
3. In the **Delete Shopping Cart** dialog, confirm the prompt with **Yes**.

## Related topics

- [Removing products from the shopping cart](#) on page 53
- [Adding products to the shopping cart](#) on page 50

## Submitting requests

After you have added products to your shopping cart (see [Adding products to the shopping cart](#) on page 50), and edited and, if necessary, checked the request (see [Managing products in the shopping cart](#) on page 52), you can submit your shopping cart.

### *To submit your requests*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, click **Submit**.

This checks, submits, and triggers the request workflow.

**TIP:** To check the request's validity before you submit the request, click **⋮ (Actions) > Check shopping cart**. You can solve most problems of invalid product requests in the shopping cart by removing the problem product from the shopping cart (see [Checking the shopping cart](#) on page 56 and [Removing products from the shopping cart](#) on page 53).

## Related topics

- [Adding products to the shopping cart on page 50](#)
- [Managing products in the shopping cart on page 52](#)
- [Checking the shopping cart on page 56](#)
- [Removing products from the shopping cart on page 53](#)

# Requesting for other identities or subidentities

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

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.

**TIP:** You can also request products for other identities directly from the shopping cart. For more information, see [Requesting products in the shopping cart for multiple identities](#) on page 56.

## To request products for other identities

1. In the menu bar, click **Requests** > **New request**.
2. On the **New Request** page, click **Change** next to the **Recipient** field.
3. In the **Change recipient** pane, in the list, select the check box next to the identity you want to request products for.  
**TIP:** To remove an identity from the recipient list, deselect the check box next to the identity.
4. Click **Apply**.
5. Add the products to the shopping cart (see [Adding products to the shopping cart on page 50](#)) that you want to request for the selected identities.
6. (Optional) Edit the shopping cart (see [Managing products in the shopping cart on page 52](#)).
7. Submit the request (see [Submitting requests on page 57](#)).

## Related topics

- [Requesting products in the shopping cart for multiple identities on page 56](#)

# Displaying and requesting other identity's products

You can request products that other identities already own. The Web Portal offers you various options for this:

- [Request by reference user](#): You can display all the products of a specific identity and request them as well.
- [Request by peer groups](#): You can display and request products that other identities within your system have already requested. As a manager, you can also see products from the peer group of an identity that you manage.

## Related topics

- [Requesting products in the shopping cart for multiple identities](#) on page 56
- [Requesting for other identities or subidentities](#) on page 58

## Requesting products through reference users

You can request products that a particular identity already owns. This is called requesting by reference user.

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

1. In the menu bar, click **Requests > New request**.
2. On the **/New Request** page, click **(Actions) > Select a reference user**.
3. In the **Select Reference User** dialog, click **Assign** next to the identity whose products you also want to request.

This opens the **New Request - By Reference User** page that, on the **Products** and **Organizational Structures** tabs, lists the requests, memberships, and entitlements of the selected identity.

4. Add the products that you want to save for later, to the shopping cart (see [Adding products to the shopping cart](#) on page 50).
5. On the **My Shopping Cart** page, click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

## Related topics

- [Requesting products through peer groups](#) on page 60
- [Managing products in the shopping cart](#) on page 52

# Requesting products through peer groups

You can see and request products that other identities within your environment have already requested. As a manager, you can also see products from the peer group of an identity that you manage. This way, you have a quick method of requesting products that are important to you or your responsible identities.

A peer group contains all the identities that have the same manager or the same primary or secondary department as the request recipient.

## *To request other identities' products*

1. In the menu bar, click **Requests > New request**.
2. (Optional) If you want to make a request for another identity or check which products have been requested by their peer group, proceeds as follows:
  - a. On the **New Request** page, click **Change** next to the **Recipient** field.
  - b. In the **Change recipient** pane, in the list, select the check boxes next to the identity you want to request products for.

**NOTE:** The list may contain a maximum of one identity. To remove an identity from the list, clear the check box in front of the corresponding identity.

- c. Click **Apply**.
3. On the **New Request** page, click **(Actions) > Show products other identities requested**.

This opens the **New Request - By Peer Group** page that, on the **Products** and **Organizational Structures** tabs, lists requests, memberships, and the peer group entitlements of the selected identity.

4. Add the products that you want to save for later, to the shopping cart (see [Adding products to the shopping cart](#) on page 50).
5. On the **My Shopping Cart** page, click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

## Related topics

- [Requesting products through reference users](#) on page 59
- [Managing products in the shopping cart](#) on page 52

# Requesting privileged access

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

**TIP:** For more information on the topic of Privileged Account Management, see the *One Identity Manager Administration Guide for Privileged Account Governance*.

### **To request privileged access**

1. In the menu bar, click **Requests > New request**.
2. On the **New Request** page, click **Show products from service category**.
3. In the **Service category** pane, click **Privileged access requests**.
4. On the **New Request** page, select how you want to access the system by selecting the check box in front of the corresponding option:
  - **Password release request:** Request a temporary password.
  - **Remote desktop session request:** Request temporary access through a remote desktop connection.
  - **SSH key request:** Request temporarily valid SSH key.
  - **SSH session request:** Request temporary access through an SSH session.
  - **Telnet session requests:** Request temporary access using a Telnet session.
5. Click **Add to cart**.
6. In the **Request Details** pane, expand the selected product.
7. In the **PAM user account** menu, select the PAM user account that you want to use for PAM access.
8. Depending on the type of access you have selected, perform one of the following actions:
  - Password request or SSH key request:
    1. In the **System to access** field, click **Assign**.
    2. In the **System to access** pane, select whether you want to request access for a **PAM asset** or a **PAM directory**.
    3. Next to the corresponding PAM directory or PAM asset, click **Assign**.
  - Remote desktop session request, SSH session request, or Telnet session request: In the **System to access**, select the corresponding PAM asset.
9. Perform the following actions:
  - a. In the **Account to access** field, click **Assign**.
  - b. In the **Account for access** pane, select whether you want to request access for a **PAM asset account** or a **PAM directory account**.
  - c. Next to the corresponding PAM asset account or PAM directory account, click **Assign**.
10. (Optional) In the **Comment** field, enter a comment, for example, to justify why you are requesting this access.
11. 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.
12. 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. For example, if you have specified that the access is valid from 12 noon tomorrow and should be valid for 60 minutes, then the validity period will expire at 1 pm tomorrow.

13. Click **Apply**.
14. (Optional) Repeat the steps for all other users and access types.
15. Click **Submit**.
16. On the **Shopping Cart** page, click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

Once the request has been approved, a button will appear in the request details pane of the request history (see [Displaying request history](#) on page 79) that you can use to log in to the Privileged Account Management system to obtain the login credentials.

## Related topics

- [Managing products in the shopping cart](#) on page 52

# Requests for Active Directory groups

To manage Active Directory groups, you can make different requests.

## Detailed information about this topic

- [Requesting new Active Directory groups](#) on page 62
- [Requesting changes to Active Directory groups](#) on page 63
- [Requesting deletion of Active Directory groups](#) on page 64

## Requesting new Active Directory groups

To create a new Active Directory group, you must request either the **Create an Active Directory security group** product or the **Create an Active Directory distribution group** product.

### *To request a new Active Directory group*

1. In the menu bar, click **Requests > New request**.
2. On the **New Request** page, click **Show products from service category**.
3. In the **Service category** pane, click the **Active Directory groups** service category.
4. Perform one of the following actions:

- To request a new Active Directory security group, click the **New Active Directory security group** tile.
  - To request a new Active Directory distribution group, click the **New Active Directory distribution group** tile.
5. Click **Add to cart**.
  6. In the **Request Details** pane, perform one of the following actions:
    - As a requester without responsibility for the target system, enter a name for the new group in the **Suggested name** field.
    - As the target system manager, provide additional details about the new group:
      - **Name**: Enter a name for the group.
      - **Group scope**: Select the scope that specifies the range of the group's usage within the domain or forest. The group's scope specifies where the group is allowed to issue permissions. You can select one of the following group scopes:
        - **Global group**: Global groups can be used to provide cross-domain authorizations. Members of a global group are only user accounts, computers, and groups belonging to the global group's domain.
        - **Local**: Local groups are used when authorizations are issued within the same domain. Members of a domain local group can be user accounts, computers, or groups in any domain.
        - **Universal**: Universal groups can be used to provide cross-domain authorizations available. Universal group members can be user accounts and groups from all domains in one domain structure.
      - **Container**: Click **Assign** and select a container for the group.
  7. Click **Apply**.
  8. Click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.
  9. On the **Shopping Cart** page, click **Submit**.

## Related topics

- [Approving pending requests from newly created Active Directory groups](#) on page 71

## Requesting changes to Active Directory groups

To change the type or scope of Active Directory groups, you must request the **Change an Active Directory group** product.

### ***To change an Active Directory group***

1. In the menu bar, click **Requests > New request**.
2. On the **Request** page, click **Show products from service category**.
3. In the **Service category** pane, click the **Active Directory groups** service category.
4. Click the **Modify Active Directory group** tile.
5. Click **Add to cart**.
6. In the **Request Details** pane, in the **Active Directory group** menu, select the Active Directory group that you want to change.
7. (Optional) In the **Group scope** menu, select the scope that specifies the range of the group's usage within the domain or forest. The group's scope specifies where the group is allowed to issue permissions. You can select one of the following group scopes:
  - **Global group**: Global groups can be used to provide cross-domain authorizations. Members of a global group are only user accounts, computers, and groups belonging to the global group's domain.
  - **Local**: Local groups are used when authorizations are issued within the same domain. Members of a domain local group can be user accounts, computers, or groups in any domain.
  - **Universal**: Universal groups can be used to provide cross-domain authorizations available. Universal group members can be user accounts and groups from all domains in one domain structure.
8. (Optional) In the **Type** menu, select the type of Active Directory group (security or distribution group).
9. Click **Apply**.
10. Click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.
11. On the **Shopping Cart** page, click **Submit**.

## **Requesting deletion of Active Directory groups**

To delete Active Directory groups you must request the **Delete Active Directory group** product.

### ***To delete an Active Directory group***

1. In the menu bar, click **Requests > New request**.
2. On the **New Request** page, click **Show products from service category**.



3. In the **Service category** pane, click the **Active Directory groups** service category.
4. Click the **Delete Active Directory Group** tile.
5. Click **Add to cart**.
6. In the **Request Details** pane, in the **Active Directory group to delete** menu, select the Active Directory group that you want to delete.
7. Click **Apply**.
8. Click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

9. On the **Shopping Cart** page, click **Submit**.

## Requesting new SharePoint groups

To create a new SharePoint group, you must request the **New SharePoint Group** product.

### *To request a new SharePoint group test*

1. In the menu bar, click **Requests > New request**.
2. On the **New Request** page, click **Show products from service category**.
3. In the **Service category** pane, click the **SharePoint groups** service category.
4. Click the **New SharePoint group** tile.
5. Click **Add to cart**.
6. In the **Request Details** pane, perform one of the following actions:
  - As a requester without responsibility for the target system, enter a name for the new group in the **Suggested name** field.
  - As the target system manager, provide additional details about the new group:
    - **Site collection:** Select a site collection where the group will be applied. A site collection groups sites together. User account and their access permissions are managed on the sites.
    - **Display name:** Enter a name for the new group.
    - **Description:** Enter a description for the SharePoint group.
7. Click **Apply**.
8. Click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

9. On the **Shopping Cart** page, click **Submit**.

## Related topics

- [Approving pending requests from newly created SharePoint groups](#) on page 72

# Saved for Later list

In your Saved for Later list you can save products that you want to request at a later date.

## Detailed information about this topic

- [Saving products for later](#) on page 66
- [Displaying Saved for Later list](#) on page 67
- [Requesting products on the Saved for Later list](#) on page 67
- [Removing products from the Saved for Later list](#) on page 68
- [Deleting the Saved for Later list](#) on page 69

## Saving products for later

If you do not want to request products immediately but at a later date, you can save the products on the Saved for Later list. You can access your Saved for Later list at any time, move products from it into your shopping cart, and request them (see [Requesting products on the Saved for Later list](#) on page 67).

### *To add products to your Saved for Later list.*

1. Add the products that you want to save for later, to the shopping cart (see [Adding products to the shopping cart](#) on page 50).
2. In the menu bar, click **Requests > Shopping cart**.
3. On the **Shopping Cart** page, in the list, select the check boxes next to the products that you want to save for later.
4. Click **⋮ (Actions) > Move to Saved for Later list**.

The products are moved with all their settings to your shopping cart.

## Related topics

- [Managing products in the shopping cart](#) on page 52

# Displaying Saved for Later list

After you have moved products to your Saved for Later list, you can display all the products saved there.

## *To display your Saved for Later list*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - If there are products in the shopping cart, click **⋮ (Actions) > View Saved for Later**.
  - If the shopping cart is empty, click **View Saved for Later list**.

## Related topics

- [Managing products in the shopping cart](#) on page 52

# Requesting products on the Saved for Later list

To request products on your Saved for Later list, you must add the products to your shopping cart.

## *To move products from the Saved for Later list to the shopping cart and request them*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - If there are products in the shopping cart, click **⋮ (Actions) > View Saved for Later**.
  - If the shopping cart is empty, click **View Saved for Later list**.
3. On the **Saved for Later** page, select the check boxes in front of the products in the list that you want to request or add to the shopping cart.
4. Click **⋮ (Actions) > Move to shopping cart**.  
This moves the products and all their settings to your shopping cart.
5. On the **Shopping Cart** page, click **Submit**.

**TIP:** You can also add more products to your shopping cart and configure various settings. For more information, see [Managing products in the shopping cart](#) on page 52.

## Related topics

- [Managing products in the shopping cart](#) on page 52
- [Submitting requests](#) on page 57

# Removing products from the Saved for Later list

You can remove products from your Saved for Later list. To delete the entire Saved for Later list, see [Deleting the Saved for Later list](#) on page 69.

### *To remove a product from your Saved for Later list*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - If there are products in the shopping cart, click **⋮ (Actions) > View Saved for Later**.
  - If the shopping cart is empty, click **View Saved for Later list**.
3. On the **Saved for Later** page, click **Remove from list** next to the product you want to remove from the Save for Later list.
4. In the **Remove Product From Saved For Later List** dialog, confirm the prompt with **Yes**.

### *To remove multiple products from your Saved for Later list*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - If there are products in the shopping cart, click **⋮ (Actions) > View Saved for Later**.
  - If the shopping cart is empty, click **View Saved for Later list**.
3. On the **Shopping Cart** page, in the list, select the check boxes next to the products that you want to remove from the Save for Later list.
4. Click **⋮ (Actions) > Remove selected**.
5. In the **Remove Selected Products From Saved For Later List** dialog, confirm the prompt with **Yes**.

## Related topics

- [Managing products in the shopping cart](#) on page 52

# Deleting the Saved for Later list

You can delete your Saved for Later list. For more information about removing individual products, see [Removing products from the Saved for Later list](#) on page 68.

## *To delete your Saved for Later list*

1. In the menu bar, click **Requests > Shopping cart**.
2. On the **Shopping Cart** page, perform one of the following actions:
  - If there are products in the shopping cart, click **⋮ (Actions) > View Saved for Later**.
  - If the shopping cart is empty, click **View Saved for Later list**.
3. On the **Saved for Later** page, click **Delete Saved for Later list**.
4. In the **Delete Saved for Later List** dialog, confirm the prompt with **Yes**.

## Related topics

- [Managing products in the shopping cart](#) on page 52

# Pending requests

Many requests go through a manual approval process in order to ensure the correct assignment of products. If the request requires approving or denying, the request classifies as pending and as approver you can make the approval decision. If you need more information to make an approval decision, you can submit an inquiry, add more approvers, or reroute the request.

## Detailed information about this topic

- [Displaying pending requests](#) on page 69
- [Approving and denying requests](#) on page 70
- [Appointing other approvers for pending requests](#) on page 74
- [Rejecting request approval](#) on page 78

# Displaying pending requests

If you are the approver of certain products and identities request these products, you can display the requests. Then you can make approval decisions about the pending requests (see [Approving and denying requests](#) on page 70).

### ***To display pending requests***

1. In the menu bar, click **Requests > Pending requests**.  
This opens the **Pending Requests** page.
2. (Optional) To display details of a pending request, click **Details** next to the request whose details you want to see.

## **Approving and denying requests**

If you are the approver of a particular product and an identity makes a request for this product, you can grant or deny approval for the request. If you approve a request, the product is available to the identity.

### ***To make an approval decision about a pending request***

1. In the menu bar, click **Requests > Pending requests**.
2. (Optional) To approve a request as a member of the chief approval team and only display the relevant requests, on the **Pending Requests** page, select the **Show requests to be approved by chief approval team** check box.
3. On the **Pending Requests** page, perform one of the following actions:
  - To approve a request, click **Approve** next to the request.
  - To deny a request, click **Deny** next to the request.

**TIP:** To approve or deny multiple requests, in the table, select the check boxes next to the products and, below the table, click **Approve** or **Deny**.

4. (Optional) On the **Approve Request/Deny Request** page, perform the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.

**TIP:** By giving reasons, your approvals are more transparent and support the audit trail.

5. (Optional) To specify a validity period for the requested product, perform the following actions:
  - a. In the **Valid from** field, specify from when the products are is valid.
  - b. In the **Valid until** field, specify until when the product is valid.
6. Click **Save**.

### **Related topics**

- [Approving new managers' pending requests](#) on page 73

# Approving pending requests from newly created Active Directory groups

Identities can create Active Directory groups by requesting the **New Active Directory security group** or the **New Active Directory distribution group** product. As approver, you can make approval decisions about requests like this. If you approve the request, you must provide additional information about the group.

## *To approve a request to create a new Active Directory group*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Approve** next to the request for a new Active Directory group.
3. In the **Approve Request** section, enter additional information about the new group:
  - **Name:** Enter a name for the group.
  - **Group scope:** Select the scope that specifies the range of the group's usage within the domain or forest. The group's scope specifies where the group is allowed to issue permissions. You can select one of the following group scopes:
    - **Global group:** Global groups can be used to provide cross-domain authorizations. Members of a global group are only user accounts, computers, and groups belonging to the global group's domain.
    - **Local:** Local groups are used when authorizations are issued within the same domain. Members of a domain local group can be user accounts, computers, or groups in any domain.
    - **Universal:** Universal groups can be used to provide cross-domain authorizations available. Universal group members can be user accounts and groups from all domains in one domain structure.
  - **Container:** Click **Assign/Change** and select a container for the group.
4. (Optional) To specify a validity period for the Active Directory group, perform the following actions:
  - a. In the **Valid from** field, specify as from when the Active Directory groups are valid.
  - b. In the **Valid until** field, specify until when the Active Directory groups are valid.
5. (Optional) Perform one of the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.

**TIP:** By giving reasons, your approvals are more transparent and support the audit trail.

**NOTE:** For more detailed information about standard reasons, see the One Identity Manager IT Shop Administration Guide.

6. Click **Save**.

## Related topics

- [Requesting new Active Directory groups](#) on page 62

# Approving pending requests from newly created SharePoint groups

Identities can create SharePoint groups by requesting the **New SharePoint group** product. As approver, you can make approval decisions about requests like this. If you approve the request, you must provide additional information about the group.

## *To approve a request to create a new SharePoint group*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Approve** next to the request for a new SharePoint group.
3. In the **Approve Request** section, enter additional information about the new group:
  - **Site collection:** Select a site collection where the group will be applied. A site collection groups sites together. User account and their access permissions are managed on the sites.
  - **Display name:** Enter a name for the new group.
  - **Description:** Enter a description for the SharePoint group.
4. (Optional) To specify a validity period for the SharePoint group, perform the following actions:
  - a. In the **Valid from** field, specify as from when the SharePoint groups are valid.
  - b. In the **Valid until** field, specify until when the SharePoint groups are valid.
5. (Optional) Perform the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.

**TIP:** By giving reasons, your approvals are more transparent and support the audit trail.

**NOTE:** For more detailed information about standard reasons, see the One Identity Manager IT Shop Administration Guide.

6. Click **Save**.



## Related topics

- [Requesting new SharePoint groups](#) on page 65

# Approving new managers' pending requests

Managers can allocate new managers for their identities. To do this, they must select the new manager and a deadline in the future for changing managers (see [Assigning other managers to my identities](#) on page 140). An assignment of this type triggers a request of type **New manager assignment**.

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

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

### *To approve an escalated assignment to a new manager*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, next to the **New manager assignment** request, click **Approve**.
3. In the **Approve Request** page, expand the **New manager assignment** pane.
4. (Optional) If the identity has already been assigned entitlements or products, these will be removed or unsubscribed by default on the effective date. If you want the identity to retain these entitlements or products when transferring to the new manager, disable the check boxes next to the respective entitlements and products.
5. (Optional) To specify from when the new manager is responsible for the identity, enter the date in the **Valid from** field. If you leave the field blank, the change of manager will be carried out immediately after approval.
6. (Optional) In the **Approve Request** pane, perform the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. In the **Additional comments about your decision** field, enter extra information about your approval decision.
7. Click **Save**.

## Related topics

- [Assigning other managers to my identities](#) on page 140

# Appointing other approvers for pending requests

You can give an another identity the task of approving a product request. To do this, you have the following options:

- **Reroute approval**  
You give the task of approving to another approval level (see [Rerouting approvals of pending requests](#) on page 74).
- **Appoint additional approver**  
You can give an another identity the task of approving (see [Appointing additional approvers to pending requests](#) on page 75). The additional approver must make an approval decision in addition to the other approvers.  
The additional approver can reject the approval and return it to you (see [Rejecting request approval](#) on page 78).  
You can withdraw an additional approver. For example, if the other approver is not available.
- **Delegate approval**  
You delegate the task of approving to another approval level (see [Delegating approvals of pending requests to other identities](#) on page 76). This identity is added as approver in the current approval step and makes approval decisions on your behalf.  
The new approver can reject the approval and return it to you (see [Rejecting request approval](#) on page 78).  
You can withdraw a delegation and delegate another identity. For example, if the other approver is not available.

## Rerouting approvals of pending requests

You can let another approval level of the approval workflow make the approval decision about a product. For example, if approval is required by a manager in a one-off case.

### *To reroute an approval*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Details** next to the request whose approval you want to reroute.
3. In the **View Request Details** pane, click **Reroute approval**.
4. In the **Reroute approval** pane, in the **Select approval level** menu, select the approval level you want to reroute to.
5. (Optional) In the **Reason for your decision** field, enter a reason for rerouting.
6. Click **Save**.

### ***To reroute multiple approvals***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, in the list, select the check boxes next to the requests whose approvals you want to reroute.
3. Click **⋮ (Actions) > Reroute approval**.
4. In the **Reroute Approval** pane, in the **Select approval level** menu, select the respective approval level to reroute to.
5. (Optional) In the **Reason for your decision** field, enter a reason for rerouting.
6. Click **Save**.

## **Appointing additional approvers to pending requests**

You can give another identity the task of approving a product request. The additional approver must make an approval decision in addition to the other approvers.

### ***To add an additional approver***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, in the list, click **Details** next to the request to which you want to add an additional approver.
3. In the **View Request Details** pane, click **Add approver**.
4. In the **Add Additional Approver** pane, in the **Additional approver** menu, select the identity that you want to act as an additional approver.
5. In the **Reason for your decision** field, select a standard reason for adding an additional approver.
6. Click **Save**.

### ***To add an additional approver to multiple requests***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, in the list, select the check boxes next to the requests to which you want to add an additional approver.
3. Click **⋮ (Actions) > Add approver**.
4. In the **Add Additional Approver** pane, in the **Additional approver** menu, select the identity that you want to act as an additional approver.
5. In the **Reason for your decision** field, select a standard reason for adding an additional approver.
6. Click **Save**.

## Related topics

- [Removing additional approvers of pending requests](#) on page 76

## Removing additional approvers of pending requests

If you have given the task of approving a product request to another identity, you can remove this additional approver as long as the product has the status **Request**. Once the additional approver has been removed, the original approvers are the only approvers for this request and you can add a new additional approver.

### *To withdraw a request's additional approver*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Details** next to the request to which you added an additional approver.
3. In the **View Request Details** pane, click **Withdraw additional approver**.
4. In the **Withdraw Additional Approver** pane, in the **Reason for your decision** pane, enter a reason for the withdrawal.
5. Click **Save**.

### *To withdraw additional approver from multiple requests*

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, in the list, select the check boxes next to the requests to which you added an additional approver.
3. Click **⋮ (Actions) > Withdraw additional approver**.
4. In the **Withdraw Additional Approver** pane, in the **Reason for your decision** pane, enter a reason for the withdrawal.
5. Click **Save**.

## Related topics

- [Appointing additional approvers to pending requests](#) on page 75

## Delegating approvals of pending requests to other identities

You can delegate an approval decision about a request to another identity. You can revoke this action in the approval history (see [Withdrawing delegations from pending requests](#) on page 77).

### ***To delegate an approval***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Details** next to the request whose approval decision you want to delegate to another identity.
3. In the **View Request Details** pane, click **Delegate approval**.
4. In the **Delegate approval**, in the **Delegate to** menu, select the identity to which you want to delegate the approval.
5. In the **Reason for your decision** field, enter a reason for the delegation.
6. Click **Save**.

### ***To delegate approval of multiple requests***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, in the list, select the check boxes next to the requests whose approval you want to delegate to another identity.
3. Click **⋮ (Actions) > Delegate approval**.
4. In the **Delegate approval**, in the **Delegate to** menu, select the identity to which you want to delegate the approval.
5. In the **Reason for your decision** field, enter a reason for the delegation.
6. Click **Save**.

### **Related topics**

- [Withdrawing delegations from pending requests](#) on page 77

## **Withdrawing delegations from pending requests**

If a request's approval has been delegated to another identity, you can withdraw the delegation.

### ***To withdraw an approval delegation***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click **Details** next to the request with the approval delegation you want to withdraw.
3. In the **View Request Details** pane, click **Withdraw delegation**.
4. In the **Withdraw Delegation** pane, in the **Reason for your decision** field, enter why you are withdrawing the approval delegation.
5. Click **Save**.

### ***To withdraw multiple delegations from approvals***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, in the list, select the check boxes next to the requests whose approval delegations you want to withdraw.
3. Click **⋮ (Actions) > Withdraw delegation**.
4. In the **Withdraw Delegation** pane, in the **Reason for your decision** field, enter why you are withdrawing the approval delegations.
5. Click **Save**.

### **Related topics**

- [Delegating approvals of pending requests to other identities](#) on page 76

## **Rejecting request approval**

If you have been added to a product request as an additional approver or the approval of the product request was passed to you, you can reject the approval and return the request to the original approver.

### ***To reject an approval***

1. In the menu bar, click **Requests > Pending requests**.
2. On the **Pending Requests** page, click **Details** next to the request that you do not want to make an approval decision about.
3. In the **View Request Details** pane, click **Reject approval**.
4. In the **Reject Approval**, in the **Reason for your decision** pane, enter a reason for the rejecting.
5. Click **Save**.

### ***To reject approval of multiple requests***

1. In the menu bar, click **Requests > Pending requests**.
  2. On the **Pending Requests** page, in the list, select the check boxes next to the requests that you do not want to make an approval decision about.
  3. Click **⋮ (Actions) > Reject approval**.
  4. In the **Reject Approval**, in the **Reason for your decision** pane, enter a reason for the rejecting.
  5. Click **Save**.
- [Appointing additional approvers to pending requests](#) on page 75

# Displaying request history

You can display the request history to obtain an overview of all the products that you have requested for yourself or other identities, or to see the status of a current request.

## *To display the request history*

1. In the menu bar, click **Requests > Request History**.  
This opens the **Request History** page.
2. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just pending requests (no approval decision yet made).
3. (Optional) To display details of a request, click **Details** next to the request whose details you want to see.

## Related topics

- [Canceling requests](#) on page 79
- [Renewing products with limit validity periods](#) on page 80
- [Unsubscribing products](#) on page 81

# Canceling requests

You can cancel requests for individual products that are not (yet) assigned and have not yet been through a complete request workflow.

You can cancel your own requests or those of other identities that report to you.

## *To cancel a request*

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **Pending** box.
4. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just requests that you have carried out for other identities.
5. (Optional) If you want to cancel a request of another identity, in the 🔍 **Search** field, enter the identity's name.
6. Click **Details** next to the request you want to cancel.
7. In the **View Request Details** pane, click **Cancel request**.
8. In the **Cancel Request** pane, perform the following actions:

- a. In the **Reason for your decision** field, enter a reason for the cancellation.
- b. Click **Save**.

## Related topics

- [Requesting products](#) on page 50
- [Displaying request history](#) on page 79
- [Renewing products with limit validity periods](#) on page 80
- [Unsubscribing products](#) on page 81

# Renewing products with limit validity periods

Some products are only valid for a limited period. You can renew products with a limited validity period that have already been assigned.

You can renew products for yourself or for other identities that you manage.

**NOTE:** You are notified 14 days before your limited period products expire. You can renew the product after receiving this message. The products are automatically unsubscribed once they have expired.

## *To renew a product's validity period*

1. In the menu bar, click **Requests** > **Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **Active** box.
4. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just requests that you have carried out for other identities.
5. (Optional) If you want to renew a product of another identity, in the 🔍 **Search** field, enter the identity's name.
6. Next to the product that you want to renew, click **Details**.
7. In the **View Request Details** pane, click **Renew product**.
8. In the **Renew Product** pane, perform the following actions:
  - a. In the **Renewal date** field, enter the renewal date for the product. If the field is empty the product has unlimited availability.
  - b. In the **Reason for your decision** field, enter a reason for the renewal.
  - c. Click **Save**.



### ***To renew the validity period of multiple products***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **Active** box.
4. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just requests that you have carried out for other identities.
5. (Optional) If you want to renew products of another identity, in the 🔍 **Search** field, enter the identity's name.
6. Select the check boxes next to the products you want to renew.
7. Click ⚙ (**Actions**) > **Renew product**.
8. In the **Renew Product** pane, perform the following actions:
  - a. In the **Renewal date** field, enter the renewal date for the products. If the field is empty the products have unlimited availability.
  - b. In the **Reason for your decision** field, enter a reason for the renewal.
  - c. Click **Save**.

### **Related topics**

- [Setting the validity period of products in your shopping cart](#) on page 54
- [Canceling requests](#) on page 79
- [Unsubscribing products](#) on page 81

## **Unsubscribing products**

You can unsubscribe from products that are already assigned if they are not longer required. Products that can be unsubscribed have the **Assigned** status.

You can unsubscribe your own products or those belonging to other identities that you manage.

### ***To unsubscribe a product***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **Active** box.
4. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just requests that you have carried out for other identities.

5. (Optional) If you want to unsubscribe a product of another identity, in the 🔍 **Search** field, enter the identity's name.
6. In the list, click **Details** next to the product that you want to unsubscribe.
7. In the **View Request Details** pane, click **Unsubscribe product**.
8. In the **Unsubscribe Product** pane, perform the following actions:
  - a. In the **Unsubscribed as from** field, enter the date for unsubscribing the product. If you leave this field empty, the product is unsubscribed once you have clicked **Saved**.
  - b. In the **Reason for your decision** field, enter a reason for unsubscribing.
  - c. In the **Additional comments about your decision** field, enter extra information about unsubscribing.
  - d. Click **Save**.

### ***To unsubscribe multiple products***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **Active** box.
4. (Optional) To control which requests are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just requests that you have carried out for other identities.
5. (Optional) If you want to unsubscribe products of another identity, in the 🔍 **Search** field, enter the identity's name.
6. In the list, select the check boxes next to the products you want to unsubscribe.
7. Click ☰ (**Actions**) > **Unsubscribe product**.
8. In the **Unsubscribe Product** pane, perform the following actions:
  - a. In the **Unsubscribed as from** field, enter the date for unsubscribing the products. If you leave this field empty, the products are unsubscribed once you have clicked **Saved**.
  - b. In the **Reason for your decision** field, enter a reason for unsubscribing.
  - c. In the **Additional comments about your decision** field, enter extra information about unsubscribing.
  - d. Click **Save**.

### **Related topics**

- [Displaying request history](#) on page 79
- [Renewing products with limit validity periods](#) on page 80
- [Canceling requests](#) on page 79

# Displaying approvals

You can display all approvals of product requests that you decided upon.

## *To display approvals*

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, check the **My approvals** box.
4. (Optional) To display request details (for example, the approval workflow or who can make approval decisions about the request), click **Details** next to the request.

## **Related topics**

- [Withdrawing delegations from pending requests](#) on page 77
- [Removing additional approvers of pending requests](#) on page 76
- [Approving and denying requests](#) on page 70
- [Undoing approvals](#) on page 83

# Undoing approvals

If you have made an approval decision about a request, you can undo the approval. To do this, the following prerequisites must be met:

- You made the last approval decision about the request.
- The last approval decision about the request was made at another approval level.
- There are no parallel approval steps at the current approval level.

## *To undo an approval*

1. In the menu bar, click **Requests > Request History**.
2. (Optional) To control which requests are displayed on the **Request History** page, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just pending requests (no approval decision yet made).
3. In the list, click **Details** next to the request whose the approval that you want to undo.
4. In the **View Request Details** pane, click **Undo approval decision**.
5. In the **Undo Approval Decision** dialog, perform the following actions:
  - a. In the **Reason for your decision**, enter why you want to undo the approval.
  - b. Click **Save**.

## Related topics

- [Displaying approvals](#) on page 83

## Attestation

You can use attestation to test the balance between security and compliance within your company. Managers or others responsible for compliance can use attestation functionality to certify correctness of permissions, requests, or exception approvals either scheduled or on demand. Recertification is the term generally used to describe regular certification of permissions. The same workflow is used for attestation and recertification.

There are attestation policies defined for carrying out attestations. Attestation policies specify which objects are attested when, how often, and by whom. Once attestation starts, attestation cases are created that contain all the necessary information about the attestation objects and the attestor. The attestor checks the attestation objects. They verify the correctness of the data and initiate any changes that need to be made if the data conflicts with internal rules.

Attestation cases record the entire attestation sequence. Each attestation step in an attestation case can be audit-proof reconstructed. Attestations are run regularly using scheduled tasks. You can also trigger single attestations manually.

Attestation is complete when the attestation case has been granted or denied approval. You specify how to deal with granted or denied attestations on a company basis.

### Detailed information about this topic

- [Sending attestation reminders](#) on page 103
- [Pending attestations](#) on page 104
- [Displaying attestation history](#) on page 113
- [Managing attestations](#) on page 85

## Managing attestations

You can define attestation policies for carrying out attestations. Attestation policies specify which objects are attested when, how often, and by whom. Once attestation is started, attestation cases are created that contain all the necessary information about the attestation objects and the attestor. The attestor checks the attestation objects. They

verify the correctness of the data and initiate any changes that need to be made if the data conflicts with internal rules.

### Detailed information about this topic

- [Attestation policies](#) on page 86
- [Starting attestation](#) on page 96
- [Running sample attestations](#) on page 97
- [Attestation runs](#) on page 98
- [Attestation by peer group analysis](#) on page 101
- [Managing samples](#) on page 101

## Attestation policies

You can define attestation policies for carrying out attestations. Attestation policies specify which objects are attested when, how often, and by whom.


### Detailed information about this topic

- [Displaying attestation policies](#) on page 86
- [Setting up attestation policies](#) on page 88
- [Editing attestation policies](#) on page 90
- [Copying attestation policies](#) on page 93
- [Deleting attestation policies](#) on page 96
- [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234

## Displaying attestation policies

You can display enabled and disabled attestation policies.

### *To display attestation policies*

1. In the menu bar, click **Attestation > Attestation Policies**.  
This opens the **Attestation Policies** page.
2. (Optional) To display disabled attestation policies, clear the **Activated attestation policies only** filter on the **Attestation Policies** page. To do this, click  next to the filter (**Clear filter**).


## Related topics

- [Displaying attestation policies details](#) on page 87

## Displaying attestation policies details

To obtain an overview of an attestation policy, you can display its main data.



### *To show the details of an attestation policy*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. (Optional) To display disabled attestation policies, clear the **Activated attestation policies only** filter on the **Attestation Policies** page. To do this, click  next to the filter (**Clear filter**).
3. Next to the attestation policy whose details you want to show, click **Edit**.  
This opens the **Attestation Policy Settings** pane.
4. (Optional) To display the objects that fulfill the conditions, perform one of the following actions:
  - Objects that fulfill one condition: Under **Objects To Be Attested by This Attestation Policy**, click the number link next to the condition.
  - Objects that fulfill all conditions: Next to **Objects To Be Attested by This Attestation Policy**, click the number link.

## Displaying attestation policy reports

You can the display reports of attestation policies. These reports contain detailed information about attestation policies.

### *To display an attestation policy's report*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. (Optional) To display disabled attestation policies, clear the **Activated attestation policies only** filter on the **Attestation Policies** page. To do this, click  next to the filter (**Clear filter**).
3. On the **Attestation Policies** page, click  (**Actions**) > **Download report** next to the attestation policy whose report you want to display.  
Once the report is completely downloaded, you can open it.

## Related topics

- [Displaying attestation run reports](#) on page 100

# Setting up attestation policies

To fulfill new regulation requirements, you can create new attestation policies.

## *To create a new attestation policy*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. On the **Attestation Policies** page, click **Create attestation policy**.
3. In the **Create Attestation Policy** pane, enter the new attestation policy's main data.

**Table 14: Attestation policy main data**

Property	Description
Disabled	Specify whether the attestation policy is disabled or not. Attestation cases cannot be added to disabled attestation policies and, therefore, no attestation is done. Completed attestation cases can be deleted once the attestation policy is disabled.
Attestation policy	Enter a name for the attestation policy.
Description	Enter a description of the attestation policy.
Attestation procedure	Select which objects to attest with this attestation policy. <b>NOTE:</b> The selection of the attestation procedure is crucial. 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.
Approval policies	Specify who can approve the attestations. Depending on which attestation procedure you selected, different approval policies are available.
Attestors	Click <b>Assign/Change</b> and then select the identities that can make approval decisions about attestation cases. <b>NOTE:</b> This field is only shown if you have selected an attestation policy in the <b>Attestation policy</b> menu that demands attestation by an approver (for example, <b>Attestation by selected approvers</b> ).
Calculation schedule	Specify how often an attestation run is started with this attestation policy. Each attestation run creates a new attestation case respectively.
Time required (days)	Specify how many days attestors have to make an approval decision about the attestation cases governed by this policy. If



Property	Description
	you do not want to specify a time, enter <b>0</b> .
Owner	Select the identity that is responsible for this attestation policy. This identity can view and edit the attestation policy.
Risk index	Use the slider to define the attestation policy's risk index. This value specifies the risk for the company if attestation for this attestation policy is denied.
Compliance frameworks	Click <b>Assign/Change</b> and add a compliance framework to use. Compliance frameworks are used for classifying attestation policies, compliance rules, and company policies according to regulatory requirements. For example, internal requirements or auditing requirements.
Sample	Select which sampling data you want to use (see <a href="#">Running sample attestations</a> on page 97).  <b>NOTE:</b> You can only select samples that have not yet been assigned to an attestation policy.  <b>NOTE:</b> When you select samples, you can not set conditions anymore and vice versa.
Close obsolete tasks automatically	Specify whether attestation cases pending for this attestation policy are automatically closed if new attestation cases are created (for example, when there is a new attestation run of this attestation policy).  If an attestation run with this attestation policy is started and the option is set, new attestation cases are created according to the condition. All pending, obsolete attestation cases for newly determined attestation objects of this attestation policy are stopped. Attestation cases for attestation objects that are not recalculated, remain intact.
Approval by multi-factor authentication	Specify whether approvals about attestation cases governed by this attestation policy require multifactor authentication (for example Starling 2FA).

- To specify which objects to attest, under **Objects To Be Attested by This Attestation Policy**, click **Add condition**.
- In the **Condition type** menu, click the condition type to use (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).

**NOTE:** The options available in the **Condition type** menu depends on which attestation procedure is configured for the attestation policy.

6. (Optional) Depending on which condition type you have selected, you can filter the selection of objects to attest (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).
7. (Optional) Create more conditions if required. To do this, click **Add another condition**.
8. (Optional) If you have specified more than one condition, you must specify whether one or all of the conditions must be fulfilled by enabling the appropriate option:
  - **All conditions must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects fulfilling all of the conditions. If one of the objects to attest does not fulfill a condition, this object is not attested. In addition, use of this option generates a intersecting set of all the individual conditions of the selected objects.
  - **At least one condition must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects that fulfill at least one of the conditions. Use of this option generates a superset of all the individual conditions of the selected objects.
9. Click **Create**.

## Related topics


- [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234

## Editing attestation policies

For example, you can modify attestation policies to include more conditions.

### *To edit an attestation policy*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. On the **Attestation Policies** page, next to the attestation policy you want to edit, click **Edit**.


To view disabled attestation policies, clear the **Activated attestation policies only** filter. To do this, click  next to the filter (**Clear filter**).

**NOTE:** The system contains default attestation policies. These policies can only be edited to a limited degree. If you want to make changes to a default attestation policy, create a copy and edit the copy (see [Copying attestation policies](#) on page 93).
3. In the **Edit Attestation Policy** pane, edit the attestation policy's main data.

**Table 15: Attestation policy main data**

Property	Description
Disabled	Specify whether the attestation policy is disabled or not. Attestation cases cannot be added to disabled attestation policies and, therefore, no attestation is done. Completed attestation cases can be deleted once the attestation policy is disabled.
Attestation policy	Enter a name for the attestation policy.
Description	Enter a description of the attestation policy.
Attestation procedure	Select which objects to attest with this attestation policy. <b>NOTE:</b> The selection of the attestation procedure is crucial. 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.
Approval policies	Specify who can approve the attestations. Depending on which attestation procedure you selected, different approval policies are available.
Attestors	Click <b>Assign/Change</b> and then select the identities that can make approval decisions about attestation cases. <b>NOTE:</b> This field is only shown if you have selected an attestation policy in the <b>Attestation policy</b> menu that demands attestation by an approver (for example, <b>Attestation by selected approvers</b> ).
Calculation schedule	Specify how often an attestation run is started with this attestation policy. Each attestation run creates a new attestation case respectively.
Time required (days)	Specify how many days attestors have to make an approval decision about the attestation cases governed by this policy. If you do not want to specify a time, enter <b>0</b> .
Owner	Select the identity that is responsible for this attestation policy. This identity can view and edit the attestation policy.
Risk index	Use the slider to define the attestation policy's risk index. This value specifies the risk for the company if attestation for this attestation policy is denied.
Compliance frameworks	Click <b>Assign/Change</b> and add a compliance framework to use. Compliance frameworks are used for classifying attestation policies, compliance rules, and company policies according to

Property	Description
	regulatory requirements. For example, internal requirements or auditing requirements.
Sample	<p>Select which sampling data you want to use (see <a href="#">Running sample attestations</a> on page 97).</p> <p><b>NOTE:</b> You can only select samples that have not yet been assigned to an attestation policy.</p> <p><b>NOTE:</b> When you select samples, you can not set conditions anymore and vice versa.</p>
Close obsolete tasks automatically	<p>Specify whether attestation cases pending for this attestation policy are automatically closed if new attestation cases are created (for example, when there is a new attestation run of this attestation policy).</p> <p>If an attestation run with this attestation policy is started and the option is set, new attestation cases are created according to the condition. All pending, obsolete attestation cases for newly determined attestation objects of this attestation policy are stopped. Attestation cases for attestation objects that are not recalculated, remain intact.</p>
Approval by multi-factor authentication	Specify whether approvals about attestation cases governed by this attestation policy require multifactor authentication (for example Starling 2FA).

4. To specify which objects to attest, perform one of the following actions:
  - To add a new condition, under **Objects To Be Attested by This Attestation Policy** click **Add another condition**.
  - To edit an existing condition, under **Objects To Be Attested by This Attestation Policy**, click the condition.
  - To delete an existing condition, click  (**Delete condition**).
5. In the **Condition type** menu, click the condition type to use (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).
 

**NOTE:** The options available in the **Condition type** menu depends on which attestation procedure is configured for the attestation policy.
6. (Optional) Depending on which condition type you have selected, you can filter the selection of objects to attest (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).
7. (Optional) Create or modify more conditions if required. To do this, click **Add another condition**.

8. (Optional) If you have specified more than one condition, you must specify whether one or all of the conditions must be fulfilled by enabling the appropriate option:
  - **All conditions must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects fulfilling all of the conditions. If one of the objects to attest does not fulfill a condition, this object is not attested. In addition, use of this option generates a intersecting set of all the individual conditions of the selected objects.
  - **At least one condition must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects that fulfill at least one of the conditions. Use of this option generates a superset of all the individual conditions of the selected objects.
9. Click **Save**.

## Related topics

- [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234


## Copying attestation policies

You can copy existing attestation policies and then edit them. For example, if you want to make changes to a default attestation policy, you can copy it, edit the copy, and then use it.

Copied attestation policies can be deleted again.

### *To copy an attestation policy*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. On the **Attestation Policies** page, next to the attestation policy you want to copy, click **(Actions) > Copy**.


To view disabled attestation policies, clear the **Activated attestation policies only** filter. To do this, click  next to the filter (**Clear filter**).
3. In the **Copy Attestation Policy** pane, edit the attestation policy's main data.

**Table 16: Attestation policy main data**

Property	Description
Disabled	Specify whether the attestation policy is disabled or not. Attestation cases cannot be added to disabled attestation policies and, therefore, no attestation is done. Completed attestation cases can be deleted once the attestation policy is disabled.
Attestation policy	Enter a name for the attestation policy.

Property	Description
Description	Enter a description of the attestation policy.
Attestation procedure	<p>Select which objects to attest with this attestation policy.</p> <p><b>NOTE:</b> The selection of the attestation procedure is crucial. 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.</p>
Approval policies	Specify who can approve the attestations. Depending on which attestation procedure you selected, different approval policies are available.
Attestors	<p>Click <b>Assign/Change</b> and then select the identities that can make approval decisions about attestation cases.</p> <p><b>NOTE:</b> This field is only shown if you have selected an attestation policy in the <b>Attestation policy</b> menu that demands attestation by an approver (for example, <b>Attestation by selected approvers</b>).</p>
Calculation schedule	Specify how often an attestation run is started with this attestation policy. Each attestation run creates a new attestation case respectively.
Time required (days)	Specify how many days attestors have to make an approval decision about the attestation cases governed by this policy. If you do not want to specify a time, enter <b>0</b> .
Owner	Select the identity that is responsible for this attestation policy. This identity can view and edit the attestation policy.
Risk index	Use the slider to define the attestation policy's risk index. This value specifies the risk for the company if attestation for this attestation policy is denied.
Compliance frameworks	<p>Click <b>Assign/Change</b> and add a compliance framework to use.</p> <p>Compliance frameworks are used for classifying attestation policies, compliance rules, and company policies according to regulatory requirements. For example, internal requirements or auditing requirements.</p>
Sample	<p>Select which sampling data you want to use (see <a href="#">Running sample attestations</a> on page 97).</p> <p><b>NOTE:</b> You can only select samples that have not yet been assigned to an attestation policy.</p> <p><b>NOTE:</b> When you select samples, you can not set conditions</p>

Property	Description
	anymore and vice versa.
Close obsolete tasks automatically	<p>Specify whether attestation cases pending for this attestation policy are automatically closed if new attestation cases are created (for example, when there is a new attestation run of this attestation policy).</p> <p>If an attestation run with this attestation policy is started and the option is set, new attestation cases are created according to the condition. All pending, obsolete attestation cases for newly determined attestation objects of this attestation policy are stopped. Attestation cases for attestation objects that are not recalculated, remain intact.</p>
Approval by multi-factor authentication	Specify whether approvals about attestation cases governed by this attestation policy require multifactor authentication (for example Starling 2FA).

4. To specify which objects to attest, perform one of the following actions:
  - To add a new condition, under **Objects To Be Attested by This Attestation Policy** click **Add another condition**.
  - To edit an existing condition, under **Objects To Be Attested by This Attestation Policy**, click the condition.
  - To delete an existing condition, click  (**Delete condition**).
5. In the **Condition type** menu, click the condition type to use (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).
 

**NOTE:** The options available in the **Condition type** menu depends on which attestation procedure is configured for the attestation policy.
6. (Optional) Depending on which condition type you have selected, you can filter the selection of objects to attest (see [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234).
7. (Optional) Create or modify more conditions if required. To do this, click **Add another condition**.
8. (Optional) If you have specified more than one condition, you must specify whether one or all of the conditions must be fulfilled by enabling the appropriate option:
  - **All conditions must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects fulfilling all of the conditions. If one of the objects to attest does not fulfill a condition, this object is not attested. In addition, use of this option generates a intersecting set of all the individual conditions of the selected objects.

- **At least one condition must be fulfilled:** The next time the attestation policy is run, new attestation cases are added for all objects that fulfill at least one of the conditions. Use of this option generates a superset of all the individual conditions of the selected objects.

9. Click **Create**.

## Related topics


- [Appendix: Attestation conditions and approval policies from attestation procedures on page 234](#)

## Deleting attestation policies

You can delete attestation policies that are not used anymore.

**NOTE:** You can only delete attestation policies if no attestation cases are associated with it anymore.

### *To delete an attestation policy*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. (Optional) To display disabled attestation policies, clear the **Activated attestation policies only** filter on the **Attestation Policies** page. To do this, click  next to the filter (**Clear filter**).
3. On the **Manage Attestation Policies** page, click  (**Actions**) > **Delete** next to the attestation policy you want to delete.
4. In the **Delete attestation policy** dialog, confirm the prompt with **Yes**.

## Starting attestation

In the Web Portal, there are two ways for you to set up attestation cases for an attestation policy. You can trigger attestation through a scheduled task or you can start selected objects individually.

**NOTE:** You cannot start attestation with attestation policies in the **In Processing** state.

### *To start attestation using a scheduled task*

1. In the menu bar, click **Attestation > Attestation Policies**.
2. On the **Attestation Policies** page, click **Edit** next to the attestation policy you want attest.
 

**TIP:** To display disabled attestation policies, enable the **Show disabled policies**.
3. In the **Edit attestation policy** pane, deselect the **Disabled** box.



4. In the **Calculation schedule** menu, specify how often an attestation run with this attestation policy is started.  
Each attestation run creates a new attestation case respectively.
5. Click **Save**.

### ***To start attestation for selected objects***

1. In the menu bar, click **Attestation > Attestation Policies**.
2. On the **Attestation Policies** page, next to the attestation policy that you want to start, click **⋮ (Actions) > Start attestation**.
3. In the **Start attestation** pane, perform one of the following actions:
  - To start attesting an object, click **Start attestation** next to the object.
  - To start attesting several object, select the check box in front of each object and click **Start attestation for selected**.
  - To start attesting all objects, click **Start attestation for all**.

### **Related topics**

- [Editing attestation policies](#) on page 90
- [Running sample attestations](#) on page 97

## **Running sample attestations**

You can perform attestations only for a subset of identities. For example, when attesting all identities would take too long. Samples contains identities that you can use to conduct such sample attestation.

To use sample data in an attestation, assign a sample to the corresponding attestation policy and start the attestation.

### ***To run a sample attestation***

1. In the menu bar, click **Attestation > Attestation Policies**.
2. (Optional) To display disabled attestation policies, clear the **Activated attestation policies only** filter on the **Attestation Policies** page. To do this, click **⊗** next to the filter (**Clear filter**).
3. Next to the attestation policy you want to use for the sample attestation, click **Edit**.
4. In the details pane, in the **Sample** menu, select the sample you want to use.
5. Click **Save**.

**NOTE:** If the attestation policy is enabled and a schedule is set up, the sample attestation is automatically carried out on the selected date and you do not need to take any further action.

6. On the **Attestation Policies** page, click **⋮ (Actions) > Start attestation** next to the attestation policy you want to use for the sample attestation.
7. In the **Start attestation** pane, perform one of the following actions:
  - To start attesting an object, click **Start attestation** next to the object.
  - To start attesting several objects, select the check box in front of each object and click **Start attestation for selected**.
  - To start attesting all objects, click **Start attestation for all**.

## Related topics

- [Managing samples](#) on page 101

# Attestation runs

Once attestation has started, a corresponding attestation run is added that, in turn, creates an attestation case. Attestation runs show you the attestation prediction and give you an overview of pending attestation cases.

## Detailed information about this topic

- [Displaying attestation policy runs](#) on page 98
- [Displaying attestors of application runs](#) on page 99
- [Displaying attestation cases of application runs](#) on page 99
- [Displaying attestation run reports](#) on page 100
- [Extending attestation runs](#) on page 100
- [Sending reminders about attestation runs](#) on page 103

# Displaying attestation policy runs

You can the display attestation runs of attestation policies.

## *To display attestation policy runs*

1. In the menu bar, click **Attestation > Attestation runs**.  
This opens the **Attestation Policy Runs** page
2. (Optional) To display more details of an attestation run (current date, details about attestation, attestation prediction, and attestors), click **Details** next to the attestation run, then the information is displayed in the details pane.

## Related topics

- [Sending reminders about attestation runs](#) on page 103

## Displaying attestors of application runs

You can show all the attestors that still need to make approval decisions about attestation cases in an attestation run.

In addition, you can send reminders to these attestors (see [Sending reminders about attestation runs](#) on page 103).

### *To show attestors of an attestation run*

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Runs** page, next to the attestation run whose attestor you want to display, click **Details**.
3. In the **View Attestation Run Details** pane, click the **Attestors** tab.

## Displaying attestation cases of application runs

You can view all attestation cases created in an attestation run. In addition, you can approve or reject pending attestation cases.

### *To display attestation cases of an attestation run*

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Runs** page, click **Details** next to the attestation run with the attestation cases you want to display.
3. In the **View Attestation Run Details** pane, click the **Attestation cases** tab.
4. (Optional) To further limit the attestation cases to be displayed, click ▼ (**Filter**) on the **Attestation cases** tab.
5. (Optional) To approve or deny an attestation case, perform the following actions in the **Attestation cases** tab:
  - a. Select the check box in front of the attestation case that you want to approve or deny.
  - b. Click **Approve** or **Deny**.
  - c. In the **Approve Attestation Case/Deny Attestation Case** pane, enter a reason for your approval decision in the **Reason for decision** field.
  - d. Click **Save**.
6. (Optional) To view more details of an attestation process, click **Details** next to the attestation process and refer to the **View Attestation Process Details** pane for the relevant information.

## Related topics

- [Displaying pending attestation cases](#) on page 104
- [Granting or denying attestation cases](#) on page 105

# Displaying attestation run reports

You can the display reports of attestation runs. These reports contain detailed information about the attestation runs.

### *To display an attestation run's report*

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Runs** page, click **Details** next to the attestation run whose report you want to display.
3. In the **View Attestation Run Details** pane, click **Download report**.

Once the report is completely downloaded, you can open it.

## Related topics

- [Displaying attestation policy reports](#) on page 87

# Extending attestation runs

You can extend attestation runs.

### *To extend an attestation run*

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Policy Runs** page, click **Details** next to the attestation run that you want to extend.
3. In the **View Attestation Run Details** pane, click **Extend attestation run**.
4. In the **Extend attestation run** pane, in the **New due date** field, enter a new due date.
5. In the **Reason** field, enter a reason for extending.
6. Click **Extend attestation run**.

## Related topics

- [Sending reminders about attestation runs](#) on page 103

# Attestation by peer group analysis

Using peer group analysis, approval for attestation cases can be granted or denied automatically. For example, a peer group might be all identities in the same department. Peer group analysis assumes that these identities require the same products. For example, if the majority of identities belonging to a department have a particular product, assignment to another identity in the department can be approved automatically. This helps to accelerate approval processes.

Peer group analysis can be used during attestation of the following memberships:

- Assignments of system entitlements to user accounts
- Secondary memberships in business roles

All identities that have the same manager or that belong to the same primary or secondary division as the identity linked to the attestation object (= identity to be attested) are grouped together as a peer group.

For more information about peer group analysis, see the *One Identity Manager Attestation Administration Guide*.

## Related topics

- [Appendix: Attestation conditions and approval policies from attestation procedures](#) on page 234

# Managing samples

You can perform attestations only for a subset of identities. For example, when attesting all identities would take too long. Samples contains identities that you can use to conduct such sample attestation.

**TIP:** To use samples in an attestation, assign a sample to the corresponding attestation policy and start the attestation (see [Running sample attestations](#) on page 97).

## Detailed information about this topic

- [Displaying samples](#) on page 101
- [Creating samples](#) on page 102
- [Editing samples](#) on page 102
- [Deleting samples](#) on page 103

# Displaying samples

You can display all existing samples.

### ***To display samples***

1. In the menu bar, click **Attestation > Sample data**.  
This opens the **Sample Data** page.
2. (Optional) To view a sample's data, click **Edit** next to the sample.

## **Creating samples**

You can create new samples. To do this, you create a sample and assign the corresponding sample data to it.

### ***To create a sample***

1. In the menu bar, click **Attestation > Sample data**.
2. On the **Sample Data** page, click **Create sample**.
3. In the **Create sample** pane, enter the name of the sample in the **Display name** field.
4. Click **Continue**.
5. In the **Assign identities** step, select the check box in front of the identity to which you want to assign the sample.

**TIP:** To create an empty sample, do not select a check box and click **Skip**. You can assign identities to the sample later by editing it.

6. Click **Continue**.
7. In the **Summary** step, click **Save**.

## **Editing samples**

You can assign additional identities to existing samples or remove them.

### ***To assign another identity to a sample***

1. In the menu bar, click **Attestation > Sample data**.
2. On the **Sample Data** page, click **Edit** next to the sample you want to edit.
3. In the **Edit Sample** pane, click **Assign identities**.
4. In the **Select Identities** pane, select the check box in front of the identity you want to assign to the samples.
5. Click **Assign**.

### ***To remove an identity from a sample***

1. In the menu bar, click **Attestation > Sample data**.
2. On the **Sample Data** page, click **Edit** next to the sample you want to edit.

3. In the **Edit Sample** pane, select the check box in front of the identity you want to remove.
4. Click **Remove identities**.
5. In the **Remove Identities** dialog, confirm the prompt with **Yes**.

## Deleting samples

You can delete existing samples.

### *To delete a sample*

1. In the menu bar, click **Attestation > Sample data**.
2. On the **Sample Data** page, select the check box next to the sample you want to delete.  

**TIP:** To delete multiple samples, select additional check boxes in front of the respective samples.
3. Click **Delete**.
4. In the **Delete Sample** dialog box, confirm the prompt with **Yes**.

## Sending attestation reminders

If attestors have not yet processed an attestation case, you can send a reminder email to them to remind them about approving it.

- You can send reminders to attestors of attestation cases that belong to certain attestation runs (see [Sending reminders about attestation runs](#) on page 103).

## Sending reminders about attestation runs

If attestors have not yet processed an attestation case, you can send a reminder email to them to remind them about approving it.

### *To send a reminder to all attestors of all attestation runs*

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Policy Runs** page, click **Send reminders for displayed runs**.
3. (Optional) In the **Send Reminder** pane, in the **Message** field, enter the message for the attestor. This message is added to the reminder.
4. Click **Send reminder**.

### ***To send a reminder to attestors of a selected attestation run***

1. In the menu bar, click **Attestation > Attestation runs**.
2. On the **Attestation Policy Runs** page, click **Details** next to the attestation run that has the attestors you want to remind.
3. Perform one of the following actions:
  - To send a reminder to all attestors of the attestation run, in the **View Attestation Run Details** pane, click **Send reminder to all attestors**.
  - To send a reminder to specific attestors of the attestation run, in the **View Attestation Run Details** pane, click the **Attestors** tab, select the check boxes in front of the corresponding attestors and click **Send reminder**.
4. (Optional) In the **Send Reminder** pane, in the **Message** field, enter the message for the attestor. This message is added to the reminder.
5. Click **Send reminder**.

## **Pending attestations**

Attestation policies are run on a schedule and generate attestation cases. As attestor, you can verify attestation cases and make approval decisions. Verifying attestations requires reading reports or manually checking objects that are being attested.

### **Detailed information about this topic**

- [Displaying pending attestation cases](#) on page 104
- [Granting or denying attestation cases](#) on page 105
- [Appointing other approvers for pending attestation cases](#) on page 106
- [Rejecting approval of attestation cases](#) on page 112

## **Displaying pending attestation cases**

As attestor, you can see the attestation cases that still require approval. In addition, you can obtain more information about the attestation cases.

### ***To display pending attestation cases***

1. In the menu bar, click **Attestation > Pending Attestations**.  
This opens the **Pending Attestations** page.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:



- To display attestation cases of a specific object, click ▼ (**Filter**) and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click ▼ (**Filter**) and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. (Optional) To show more details of an attestation case, click **Details** next to the attestation case.
  4. (Optional) To display objects involved in an attestation case in detail, perform the following actions:
    - a. In the list, click **Details** next to the attestation case.
    - b. In the **View Attestation Case Details** pane, click **Show details** or **Download report**.
  5. (Optional) To display all the identities that can approve the attestation case, perform the following actions:
    - a. In the list, click **Details** next to the attestation case.
    - b. In the **View Attestation Case Details** pane, click the **Workflow** tab.

## Related topics

- [Displaying attestation cases of application runs](#) on page 99

# Granting or denying attestation cases

As attestor, you can grant or deny approval for attestation cases under your supervision.

## *To approve an attestation case*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click ▼ (**Filter**) and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click ▼ (**Filter**) and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. (Optional) To approve an attestation case as a member of the chief approval team and only display the relevant attestation cases, toggle the **Show attestation cases to be approved by chief approval team** switch.
4. Perform one of the following actions:
  - To approve an attestation case, click **Approve** next to the attestation case.
  - To deny an attestation case, click **Deny** next to the attestation case.

**TIP:** To approve or deny multiple attestation cases, in the list, select the check boxes next to the attestation cases and click **Approve** or **Deny** below the list.

5. (Optional) In the **Approve Attestation Case/Deny Attestation Case** pane, perform the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.

**TIP:** By giving reasons, your approvals are more transparent and support the audit trail.

**NOTE:** For more detailed information about standard reasons, see the One Identity Manager IT Shop Administration Guide.

6. Click **Save**.
7. (Optional) If the approval 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 actions:
  - Click **Login with the Starling 2FA app** and follow the app instructions on your mobile phone.
  - Click **Send SMS** or **Phone call**, enter the security code, and click **Next**.

## Related topics

- [Displaying attestation cases of application runs](#) on page 99

# Appointing other approvers for pending attestation cases

You can give an additional identity the task of approving an attestation case. To do this, you have the following options:

- **Reroute approval**  
You give the task of approving to another approval level (see [Rerouting approvals of pending attestation cases](#) on page 107).
- **Appoint additional approver**  
You can give an another identity the task of approving [Appointing additional approvers to pending attestation cases](#) on page 108). The additional approver must make an approval decision in addition to the other approvers.  
The additional approver can reject the approval and return it to you (see [Rejecting approval of attestation cases](#) on page 112).  
You can withdraw an additional approver. For example, if the other approver is not available.
- **Delegate approval**  
You delegate the task of approving to another approval level (see [Delegating](#)

[approvals of pending attestation cases to other identities](#) on page 110). This identity is added as approver in the current approval step and makes approval decisions on your behalf.

The new approver can reject the approval and return it to you (see [Rejecting approval of attestation cases](#) on page 112).

You can withdraw a delegation and delegate another identity. For example, if the other approver is not available.

## Rerouting approvals of pending attestation cases

You can let another approval level of the approval workflow make the approval decision about an attestation case. For example, if approval is required by a manager in a one-off case.

### *To reroute an approval*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, click **Details** next to the attestation case whose approval you want to reroute.
4. In the **View Attestation Case Details** pane, click **Reroute approval**.
5. In the **Reroute approval** pane, in the **Select approval level** menu, select the approval level you want to reroute to.
6. (Optional) In the **Reason for your decision** field, enter a reason for rerouting.
7. Click **Save**.

### *To reroute multiple approvals*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, in the list, select the check boxes next to the attestation cases whose approvals you want to reroute.
4. Click **⋮ (Actions) > Reroute approval**.

5. In the **Reroute Approval** pane, in the **Select approval level** menu, select the respective approval level to reroute to.
6. (Optional) In the **Reason for your decision** field, enter a reason for rerouting.
7. Click **Save**.

## Appointing additional approvers to pending attestation cases

You can give another identity the task of approving an attestation case. The additional approver must make an approval decision in addition to the other approvers.

### *To add an additional approver*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, in the list, click **Details** next to the attestation case to which you want to add an additional approver.
4. In the **View Attestation Case Details** pane, click **Add attestor**.
5. In the **Add Additional Attestor** pane, in the **Additional approver** menu, select the identity that you want to act as an additional approver.
6. In the **Reason for your decision** field, select a standard reason for adding an additional approver.
7. Click **Save**.

### *To add an additional approver to multiple attestation cases*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, in the list, select the check boxes next to the attestation cases to which you want to add an additional approver.
4. Click **⋮ (Actions) > Add attestor**.

5. In the **Add Additional Attestor** pane, in the **Additional approver** menu, select the identity that you want to act as an additional approver.
6. In the **Reason for your decision** field, select a standard reason for adding an additional approver.
7. Click **Save**.

## Related topics

- [Removing additional approvers from pending attestation cases](#) on page 109

## Removing additional approvers from pending attestation cases

If you have given the task of approving an attestation case to another identity, you can remove this additional approver as long as the attestation case has **pending** status. Once the additional approver has been removed, the original approvers are the only approvers for this attestation case and you can add a new additional approver.

### *To withdraw an attestation case's additional approver*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, click **Details** next to the attestation case to which you added an additional approver.
4. In the **View Attestation Case Details** pane, click **Withdraw additional attestor**.
5. In the **Withdraw Additional Attestor** pane, in the **Reason for your decision** pane, enter a reason for the withdrawal.
6. Click **Save**.

### *To withdraw an additional approver from multiple attestation cases*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and

in the context menu, select the corresponding attestation policy under **Attestation policy**.

3. On the **Pending Attestations** page, in the list, select the check boxes next to the attestation cases to which you added an additional approver.
4. Click **⋮ (Actions) > Withdraw additional attestor**.
5. In the **Withdraw Additional Attestor** pane, in the **Reason for your decision** pane, enter a reason for the withdrawal.
6. Click **Save**.

## Related topics

- [Appointing additional approvers to pending attestation cases](#) on page 108

# Delegating approvals of pending attestation cases to other identities

You can delegate an approval decision about an attestation case to another identity. You can revoke this action in the attestation history (see [Withdrawing delegations from pending attestation case approvals](#) on page 111).

## *To delegate an approval*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, click **Details** next to the attestation case whose approval decision you want to delegate to another identity.
4. In the **View Attestation Case Details** pane, click **Delegate approval**.
5. In the **Delegate approval**, in the **Delegate to** menu, select the identity to which you want to delegate the approval.
6. In the **Reason for your decision** field, enter a reason for the delegation.
7. Click **Save**.

## *To delegate approval of multiple attestation cases*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:

- To display attestation cases of a specific object, click ▼ (**Filter**) and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click ▼ (**Filter**) and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, in the list, select the check boxes next to the attestation cases whose approval you want to delegate to another identity.
  4. Click ⋮ (**Actions**) > **Delegate approval**.
  5. In the **Delegate approval**, in the **Delegate to** menu, select the identity to which you want to delegate the approval.
  6. In the **Reason for your decision** field, enter a reason for the delegation.
  7. Click **Save**.

## Related topics

- [Withdrawing delegations from pending attestation case approvals](#) on page 111

## Withdrawing delegations from pending attestation case approvals

If an attestation's approval has been delegated to another identity, you can withdraw the delegation.

### *To withdraw an approval delegation*

1. In the menu bar, click **Attestation** > **Attestation history**.
2. On the **Attestation History** page, click **Details** next to the request whose approval delegation you want to withdraw.
3. In the **View Attestation Case Details** pane, click **Withdraw delegation**.
4. In the **Withdraw Delegation** pane, in the **Reason for your decision** field, enter why you are withdrawing the approval delegation.
5. Click **Save**.

### *To withdraw multiple delegations from approvals*

1. In the menu bar, click **Attestation** > **Attestation history**.
2. On the **Attestation History** page, in the list, select the check boxes next to the attestation cases whose approval delegations you want to withdraw.
3. Click ⋮ (**Actions**) > **Withdraw delegation**.
4. In the **Withdraw Delegation** pane, in the **Reason for your decision** field, enter why you are withdrawing the approval delegations.
5. Click **Save**.

## Related topics

- [Delegating approvals of pending attestation cases to other identities](#) on page 110

# Rejecting approval of attestation cases

If you have been added to an attestation case as an additional approver the approval of the attestation case was passed to you, you can reject the approval and return the attestation case to the original approver.

### *To reject an approval*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, click **Details** next to the attestation case that you do not want to make an approval decision about.
4. In the **View Attestation Case Details** pane, click **Reject approval**.
5. In the **Reject Approval**, in the **Reason for your decision** pane, enter a reason for the rejecting.
6. Click **Save**.

### *To reject approval of multiple attestation cases*

1. In the menu bar, click **Attestation > Pending Attestations**.
2. (Optional) On the **Pending attestations** page, perform one of the following actions:
  - To display attestation cases of a specific object, click **▼ (Filter)** and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click **▼ (Filter)** and in the context menu, select the corresponding attestation policy under **Attestation policy**.
3. On the **Pending Attestations** page, in the list, select the check boxes next to the attestation cases that you do not want to make an approval decision about.
4. Click **⋮ (Actions) > Reject approval**.
5. In the **Reject Approval**, in the **Reason for your decision** pane, enter a reason for the rejecting.
6. Click **Save**.



# Displaying attestation history

You can obtain an overview of all the attestation cases relevant to you or identities that report to you, by displaying the attestation history.

## *To display the attestation history*

1. In the menu bar, click **Attestation > Attestation history**.  
This opens the **Attestation History** page.
2. Perform one of the following actions:
  - To display attestation cases of a specific object, click ▼ (**Filter**) and in the context menu, select the corresponding object under **Object type**.
  - To display attestation cases of a specific attestation policy, click ▼ (**Filter**) and in the context menu, select the corresponding object under **Attestation policy**.
3. (Optional) To control which attestation cases are displayed, click ▼ (**Filter**) (see [Filtering](#) on page 20). For example, this allows you to show just pending attestation cases (no approval decision yet made).
4. (Optional) To display details of an attestation case, click **Details** next to the attestation case whose details you want to display.

## Related topics

- [Withdrawing delegations from pending attestation case approvals](#) on page 111

## Compliance

Companies have different requirements that they need for regulating internal and external identities' access to company resources. On the one hand, rule checks are used for locating rule violations and on the other hand, to prevent them. By using these rules, you can demonstrate compliance with legislated regulations such as the Sarbanes-Oxley Act (SOX). The following demands are made on compliance:

- Compliance rules define what an employee is entitled to do or not do. For example, an identity may not have both entitlements A and B at the same time.
- Company policies are very flexible, and can be defined for any company resources you are managing with Manager. For example, a policy might only allow identities from a certain department to own a certain entitlement.
- Each item that an identity access can be given a risk value. A risk index can be calculated for identities, 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. For example, a request will not be processed if it violates the rules, unless exception approval is explicitly granted and an approver allows it. Compliance rules (if appropriate) and company policies are run on a regular schedule and violations appear in the identity's Web Portal to be dealt with there. Company policies can contribute to mitigation control by reducing risk. For example, if risks are posed by identities running processes outside the One Identity Manager solution and causing violations. Reports and dashboards provide you with comprehensive compliance information

## Displaying compliance rules and rule violations

You can see an overview of the compliance rules and corresponding rule violations in the Web Portal. This information can help to determine gaps in your security or compliance policies and to develop attestation policies or mitigating controls. Mitigating controls are processes existing outside the One Identity Manager solution and reduce the risk of violation.

### ***To display an overview of compliance rules and rule violations***

1. In the menu bar, click **Compliance > Compliance rules**.  
This opens the **Compliance rules** page.
2. (Optional) To further limit or extend which compliance rules are displayed, click ▼ (**Filter**) and in the context menu, under **Status**, select one of the following filters:
  - **Activated**: Select this filter to display only enabled compliance rules.
  - **Deactivated**: Select this filter to display only disabled compliance rules.

**TIP:** To view all compliance rules, clear the filter. To do this, click **Clear filters** on the context menu.
3. (Optional) To view more details of a compliance rule, click **Details** next to the compliance rule.

## **Displaying reports about compliance rules and rule violations**

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).

### ***To display a report about a compliance rule and its rule violations***

1. In the menu bar, click **Compliance > Compliance rules**.
2. (Optional) To further limit or extend which compliance rules are displayed, on the **Compliance Rules** page, click ▼ (**Filter**) and in the context menu, under **Status**, select one of the following filters:
  - **Activated**: Select this filter to display only enabled compliance rules.
  - **Deactivated**: Select this filter to display only disabled compliance rules.

**TIP:** To view all compliance rules, clear the filter. To do this, click **Clear filters** on the context menu.
3. Click **Details** next to the compliance rule whose report you want to see.
4. In the **View Compliance Rule Details** pane, click **Download report**.

## Responsibilities

In One Identity Manager, identities have responsibilities for various objects. In the Web Portal, you can perform a number of actions on these responsibilities and obtain information about them.

### Detailed information about this topic

- [My responsibilities](#) on page 116
- [Delegating tasks](#) on page 175
- [Ownerships](#) on page 178

## My responsibilities

You can manage objects that you are responsible for within your company. Possible objects are:

- Identities
- Hierarchical roles
  - Organizations
    - Departments
    - Cost centers
    - Locations
  - Business roles
- Company resources
  - System entitlements

### Detailed information about this topic

- [Managing my identities](#) on page 135
- [Managing my system entitlements](#) on page 157

- [Managing my business roles](#) on page 128
- [Managing my system roles](#) on page 169
- [Managing my departments](#) on page 117
- [Managing my cost centers](#) on page 144
- [Managing my locations](#) on page 151
- [Managing my application roles](#) on page 123

## Managing my departments

You can perform a variety of actions on the departments that you manage and gather information about them.

### Detailed information about this topic

- [Displaying my departments](#) on page 117
- [Displaying and editing my department main data](#) on page 117
- [Managing my department memberships](#) on page 119
- [Berechtigungen meiner Abteilungen](#)

## Displaying my departments

You can display all the departments for which you are responsible.

### *To display departments*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.  
This opens the **Departments** page and displays all the departments for which you are responsible.

## Displaying and editing my department main data

You can edit the main data of the departments for which you are responsible.

### *To display and edit a department's main data*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.

3. On the **Departments** page, next to the department whose main data you want to show/edit, click **Edit**.
4. In the **Edit Department** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 17: Department main data**

Property	Description
Department	Enter a full, descriptive name for the department.
Short name	Enter a short name for the department.
Object ID	Enter a unique object ID for the department. For example, the object ID is required in SAP systems for assigning identities to departments.
Parent department	Click <b>Assign/Change</b> and select a department to be the parent department for organizing the department hierarchically. If you want the department at the root of a department hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the department.
2nd Manager	Select an identity to act as a deputy to the department's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Location	Click <b>Assign/Change</b> and select the location the cost center is primarily assigned to.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the department.
Cost center	Click <b>Assign/Change</b> and select the location the department is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the department.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the department.
Description	Enter a description for the department.

5. Click **Save**.

# Managing my department memberships

As soon as an identity is assigned to a department, the identity becomes a member in the department.

## Detailed information about this topic

- [Displaying memberships in my departments](#) on page 119
- [Analyzing assignments to my departments](#) on page 119
- [Adding identities to my departments](#) on page 120
- [Removing identities from my departments](#) on page 121

## Displaying memberships in my departments

You can display identities that are assigned departments for which you are responsible.

### *To display identities that are assigned a department*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department whose memberships you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To display all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to my departments

You can see how a department assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department whose memberships you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.

6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Adding identities to my departments

You can assign identities to departments for which you are responsible. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To add an identity to a department*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department you want to add an identity to, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the department.
8. Click **Request memberships**.
9. Close the **Edit Department** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the department.

### *To re-add an excluded member*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department you want to add again, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.



## Related topics

- [Requesting products](#) on page 50

## Removing identities from my departments

You can remove departments from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### *To remove a department from an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department with a membership you want to delete, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## Managing my departments' entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to system roles you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the departments.

### Detailed information about this topic

- [Displaying my department entitlements](#) on page 121
- [Adding entitlements to my departments](#) on page 122
- [Deleting my department entitlements](#) on page 122

## Displaying my department entitlements

You can display entitlements that are assigned departments for which you are responsible.

### ***To display entitlements***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department whose entitlements you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Permissions** tab.

## **Adding entitlements to my departments**

You can add entitlements to departments for which you are responsible. You do this through requests.

### ***To add an entitlement to a department***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department you want to add an entitlement to, click **Edit**.
4. In the **Edit Department** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Department** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the department.

### **Related topics**

- [Requesting products](#) on page 50

## **Deleting my department entitlements**

You can delete entitlements that are assigned departments for which you are responsible.

### ***To delete an entitlement of a department***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Departments**.
3. On the **Departments** page, next to the department whose entitlement you want to delete, click **Edit**.
4. In the **Edit Department** pane, click the **Entitlements** tab.
5. On the **Permissions** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. Confirm the prompt with **Yes** in the dialog.

## **Managing my application roles**

Use application roles to quickly and simply assign entitlement profiles to identities that match their tasks and functions. One Identity Manager already supplies a number of default application roles.

You can perform a variety of actions on the application roles that you manage and gather information about them.

### **Detailed information about this topic**

- [Displaying my application roles](#) on page 123
- [Displaying and editing my application roles' main data](#) on page 124
- [Managing my application role memberships](#) on page 125

## **Displaying my application roles**

You can display all the application roles for which you are responsible.

### ***To display application roles***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.  
This opens the **Application Roles** page and displays all the application roles for which you are responsible.

# Displaying and editing my application roles' main data

You can edit the main data of the application roles that you are responsible for.

## *To display and edit an application role's main data*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.
3. On the **Application Roles** page, next to the application role whose main data you want to show/edit, click **Edit**.
4. In the **Edit Application role** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 18: Main data of application roles**

Property	Description
Application role	Enter a full, descriptive name for the application role.
Internal name	Enter a company internal name for the application role.
Parent application role	Click <b>Assign/Change</b> and select an application role to be the parent application role to organize the application role hierarchically. If you want the application role at the root of an application role hierarchy, leave the field empty.
Manager	Click <b>Assign/Change</b> and select the manager responsible for the application role.
2nd Manager	Click <b>Assign/Change</b> and select an identity to act as a deputy to the application role's manager.
Description	Enter a description for the application role.
Comment	Enter a comment for the application role.
Full name	Shows the full name of the application role, which is automatically made up of the identifiers of the application role and the parent application role.
Department	Click <b>Assign/Change</b> and select a department for the application role.
Location	Click <b>Assign/Change</b> and select a location for the application role.
Cost center	Click <b>Assign/Change</b> and select a cost center for the application role.

5. Click **Save**.

## Managing my application role memberships

As soon as an identity is assigned to an application role, the identity becomes a member in the application role.

### Detailed information about this topic

- [Displaying memberships in my application roles](#) on page 126
- [Analyzing assignments to my application roles](#) on page 126

- [Assigning identities to my application roles](#) on page 126
- [Removing identities from my application roles](#) on page 127

## Displaying memberships in my application roles

You can display identities that are assigned application roles for which you are responsible.

### *To display identities that are assigned an application role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.
3. On the **Application Roles** page, next to the application role whose memberships you want to display, click **Edit**.
4. In the **Edit Application role** pane, click the **Memberships** tab.
5. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to my application roles

You can see how an application role assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.
3. On the **Application Roles** page, next to the application role whose memberships you want to display, click **Edit**.
4. In the **Edit Application role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Assigning identities to my application roles

You can assign identities to application roles for which you are responsible. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### ***To assign an identity to an application role***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.
3. On the **Application Roles** page, next to the application role you want to add an identity to, click **Edit**.
4. In the **Edit Application Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Request memberships**.
6. In the **Select Identities** pane, select the check box next to the identity you want to assign to the application role.
7. Click **Request memberships**.
8. Close the **Edit Application Role** pane.
9. In the menu bar, click **Requests > Shopping cart**.
10. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the application role.

### ***To re-add an excluded member***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.
3. On the **Application Roles** page, next to the application role you want to add again, click **Edit**.
4. In the **Edit Application Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

### **Related topics**

- [Requesting products](#) on page 50

## **Removing identities from my application roles**

You can remove application roles from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### ***To remove an application role from an identity***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Application roles**.

3. On the **Application Roles** page, next to the application role with a membership you want to delete, click **Edit**.
4. In the **Edit Application Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## Managing my business roles

Business roles are defined based on resources to perform specific functions.

Business roles are objects for mapping company-specific functions in One Identity Manager. Business roles map company structures with similar functionality that exist in addition to departments, cost centers, and locations. This might be projects groups, for example.

You can carry out various actions on the system entitlements that you manage and obtain information about them.

### Detailed information about this topic

- [Displaying my business roles](#) on page 128
- [Displaying and editing my business roles' main data](#) on page 129
- [Managing my business role memberships](#) on page 131
- [Managing my business roles' entitlements](#) on page 133

## Displaying my business roles

You can display all the business roles for which you are responsible.

### *To display business roles*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.

This opens the **Business Roles** page and display all the business roles for which you are responsible.



# Displaying and editing my business roles' main data

You can edit the main data of the business roles for which you are responsible.

## *To display and edit a business role's main data*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose main data you want to show/edit, click **Edit**.
4. In the **Edit Business Role** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 19: Business role main data**

Property	Description
Business role	Enter a full, descriptive name for the business role.
Short name	Enter a short name for the business role.
Internal name	Enter a company internal name for the business role.
Description	Enter a description for the business role.
Role class	<p>When you create the business role: Select the role class of the business role.</p> <p>To differentiate between different business roles, define company specific role classes. Role classes are used to specify which company resource assignments are possible through roles in a role class.</p>
Parent business role	Click <b>Assign/Change</b> and select a business role to be the parent business role for organizing the business role hierarchically. If you want the business role at the root of a business role hierarchy, leave the field empty.
Role type	<p>Select the role type of the business role.</p> <p>Role types are mainly used to regulate approval policy inheritance.</p>
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the business role.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the business role.
Manager	Select the manager who is responsible for the business role.
2nd Manager	Select an identity to act as a deputy to the business role's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Employees do not inherit	Select this check box if you want to temporarily prevent identities from inheriting this business role.
Comment	Enter a comment for the business role.

5. Click **Save**.

# Managing my business role memberships

As soon as a business role is assigned to an identity, the identity becomes a member in the business role.

## Detailed information about this topic

- [Displaying my business roles' memberships](#) on page 131
- [Analyzing assignments to my business roles](#) on page 131
- [Assigning identities to my business roles](#) on page 132
- [Removing identities from my business roles](#) on page 133

## Displaying my business roles' memberships

You can display identities that are assigned business roles for which you are responsible.

### *To display identities that are assigned a business role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose memberships you want to display, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To display all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to my business roles

You can see how a business role under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose memberships you want to display, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.

6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Assigning identities to my business roles

You can assign identities to business roles for which you are responsible. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To assign a business role to an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role you want to add an identity to, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the business role.
8. Click **Request memberships**.
9. Close the **Edit Business Roles** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the business role.

### *To re-add an excluded member*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role you want to add again, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

## Removing identities from my business roles

You can remove business roles from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### *To remove a business role from an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role with a membership you want to delete, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## Managing my business roles' entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. Assigning identities to business roles avoids you having to assign entitlements separately to each identity. All a business role's entitlements are automatically assigned to all the identities assigned to the business role.

### Detailed information about this topic

- [Displaying my business roles' entitlements](#) on page 134
- [Adding entitlements to my business roles](#) on page 134
- [Deleting my business roles' entitlements](#) on page 134

## Displaying my business roles' entitlements

You can display entitlements that are assigned business roles for which you are responsible.

### *To display entitlements*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose entitlements you want to display, click **Edit**.
4. In the **Edit Business Role** pane, click the **Permissions** tab.

## Adding entitlements to my business roles

You can add entitlements to business roles for which you are responsible. You do this through requests.

### *To add an entitlement to a business role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role you want to add an entitlement to, click **Edit**.
4. In the **Edit Business Role** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Business Role** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the business role.

### Related topics

- [Requesting products](#) on page 50

## Deleting my business roles' entitlements

You can delete entitlements that are assigned business roles for which you are responsible.

### ***To delete an entitlement of a business role***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose entitlement you want to delete, click **Edit**.
4. In the **Edit Business Role** pane, click the **Entitlements** tab.
5. On the **Permissions** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. Confirm the prompt with **Yes** in the dialog.

## **Managing my identities**

You can carry out various actions on the identities that you manage and obtain information about them.

### **Detailed information about this topic**

- [Displaying my identities](#) on page 135
- [Deactivating my identities](#) on page 139
- [Reactivating my identities](#) on page 139
- [Displaying and editing my identities' main data](#) on page 136
- [Assigning other managers to my identities](#) on page 140
- [Creating reports about my identities](#) on page 140
- [Displaying my identities' application roles](#) on page 138
- [Displaying my identities' system entitlements](#) on page 138
- [Displaying my identities' user accounts](#) on page 138
- [Managing my identities' attestation cases](#) on page 141
- [Marking my identities as security risks](#) on page 143
- [Revoking my identities' security risks](#) on page 143
- [Creating passcodes for my identities](#) on page 144

## **Displaying my identities**

You can display all the identities for which you are responsible.

### ***To display identities***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.  
This opens the **Identities** page and displays all the identities that report directly to you.
3. (Optional) To also display identities that report indirectly to you, deselect the **Show only direct reports** option.
4. (Optional) To display details of an identity, click it in the list.

## **Displaying and editing my identities' main data**


You can edit the main data of the identities for which you are responsible.

### ***To display and edit an identity's main data***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity whose main data you want to display/edit.
4. In the **Edit Identity** pane, expand the one of the sections.
5. Make your changes in the corresponding fields:

You can edit the following main data.

**Table 20: Identities main data**

<b>Property</b>	<b>Description</b>
<b>Personal data</b>	
Last name	Enter the identity's last name.
First name	Enter the identity's first name.
Middle name	Enter the identity's middle name.
Date of birth	Enter the identity's date of birth. Click the  ( <b>Calendar</b> ) to do this and use the date picker to select the date of birth.
Personnel number	Enter the identity's personnel number.
Gender	In the menu, select the identity's gender.
Central user account	Enter the name of the identity's central user account.
Default email address	Enter the identity's default email address.
Resetting the password	Select the check box to allow password help desk staff



Property	Description
through the help desk is permitted.	to reset the identity's password in the Operations Support Web Portal.
Identity does not pose a security risk/Identity poses a security risk	Toggle the switch to specify whether the identity poses a security risk or not (see <a href="#">Marking my identities as security risks</a> on page 143).
<b>Organizational information</b>	
Primary cost center	Click <b>Assign/Change</b> and select the identity's primary cost center.
Primary department	Click <b>Assign/Change</b> and select the identity's primary department.
External	Select the check box if this is an external identity.
Employee type	In the menu, select what type of identity this is. For example, an identity of this company or a trainee.
Entry date	Enter the date the identity started at the company. Click the  ( <b>Calendar</b> ) and use the date picker to select the starting date.
Leaving date	Enter the date that the identity leaves the company. Click the  ( <b>Calendar</b> ) to do this and use the date picker to select the leaving date.
Manager	Shows you the identity's manager. <b>TIP:</b> If necessary, you can transfer the identity's manager at a later date (see <a href="#">Assigning other managers to my identities</a> on page 140).
Permanently deactivated	Select the check box if you want the identity to be permanently deactivated (see <a href="#">Deactivating my identities</a> on page 139).
Temporarily disabled	Select the check box if you want to deactivate the identity only temporarily.
<b>Location information</b>	
Primary location	Click <b>Assign/Change</b> and select the identity's primary location.
Building	Enter the building where the identity works.
Floor	Enter which floor the identity works on.
Room	Enter the room the identity works in.

Property	Description
Street	Enter the road where the identity works.
Zip code	Enter the zip code of the identity's work location.
City	Enter the city where the identity works.
Country	In the menu, select the country where the identity works.
State	In the menu, select the state where the identity works.

6. Click **Save**.

## Displaying my identities' application roles

You can display application roles that are assigned identities for which you are responsible.

### *To display an identity's application roles*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity whose application roles you want to display.
4. In the **Edit Identity** pane, click the **Application Roles** tab.

## Displaying my identities' system entitlements

You can display system entitlements that are assigned identities for which you are responsible.

### *To display an identity's system entitlements*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity whose system entitlements you want to display.
4. In the **Edit Identity** pane, click the **System Entitlements** tab.

## Displaying my identities' user accounts

You can display user accounts that are assigned identities for which you are responsible.

### ***To display an identity's user accounts***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity whose user accounts you want to display.
4. In the **Edit Identity** pane, click the **User accounts** tab.

## **Deactivating my identities**

You can deactivate identities permanently such as when an employee leaves a company. This may be necessary to strip these identities of their permissions in the connected target system and from their company resources.

Effects of permanent deactivating an identity are:

- The identity cannot be assigned to identities as a manager.
- The identity cannot be assigned to roles as a supervisor.
- The identity cannot be assigned to attestation policies as an owner.
- The identity's user accounts are locked or deleted and then removed from group memberships.

### ***To deactivate an identity***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity you want to deactivate.
4. In the **Edit Identity** pane, expand the **Organizational information** section.
5. In the **Organizational Information** section, select the **Permanently deactivated** check box.
6. Click **Save**.

## **Reactivating my identities**

You can activate permanently deactivated identities if they have not been deactivated by certification.

### ***To reactivate an identity***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity you want to activate.
4. In the **Edit Identity** pane, expand the **Organizational information** section.

5. In the **Organizational Information** pane, clear the **Permanently deactivated** check box.
6. Click **Save**.

## Assigning other managers to my identities

You can assign other managers to the identities for which you are responsible.

### *To assign a new manager to an identity*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity that you want to assign to a new manager.
4. In the **Edit Identity Data** pane, click **Assign to new manager**.
5. On the **Shopping Cart** page, click **Edit** next to **Assign new manager**.
6. In the **New manager assignment** pane, in the **New manager** menu, select the manager you want to assign to the identity.
7. (Optional) If the identity for which you are selecting a new manager already has entitlements or products assigned, they are removed or unsubscribed by default on the effective date. If you want the identity to retain these entitlements or products when transferring to the new manager, disable the check boxes next to the respective entitlements and products.
8. (Optional) In the **Reason** field, enter why you are assigning a new manager.
9. (Optional) In the **Priority** menu, select the priority.
10. (Optional) To specify from when the new manager is responsible for the identity, enter the date in the **Valid from** field. If you leave the field blank, the change of manager will be carried out immediately after the new manager is approved.
11. Click **Save**.
12. On the **Shopping Cart** page, click **Submit**.

**NOTE:** On the **Pending Requests** page, your request to change managers is presented to the new manager to be granted or denied approval (see [Approving new managers' pending requests](#) on page 73). After the new manager approves this requests, the new manager is assigned.

### Related topics

- [Approving new managers' pending requests](#) on page 73

## Creating reports about my identities

You can create reports about identity data.

### ***To create a report about an identity***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity for which you want to create a report.
4. In the **Edit Identity** pane, click **Download report**.

## **Managing my identities' attestation cases**

You can use attestation to test the balance between security and compliance within your company. Managers or others responsible for compliance can use One Identity Manager attestation functionality to certify correctness of permissions, requests, or exception approvals either scheduled or on demand. Recertification is the term generally used to describe regular certification of permissions. One Identity Manager uses the same workflows for recertification and attestation.

There are attestation policies defined in One Identity Manager for carrying out attestations. Attestation policies specify which objects are attested when, how often, and by whom. Once an attestation is performed, One Identity Manager creates attestation cases that contain all the necessary information about the attestation objects and the attestor responsible. The attestor checks the attestation objects. They verify the correctness of the data and initiate any changes that need to be made if the data conflicts with internal rules.

Attestation cases record the entire attestation sequence. Each attestation step in an attestation case can be audit-proof reconstructed. Attestations are run regularly using scheduled tasks. You can also trigger single attestations manually.

Attestation is complete when the attestation case has been granted or denied approval. You specify how to deal with granted or denied attestations on a company basis.

### **Detailed information about this topic**

- [Displaying attestation cases of my identities](#) on page 141
- [Approving and denying attestation cases of my identities](#) on page 142

## **Displaying attestation cases of my identities**

You can display attestation cases that involve identities for which you are responsible. In addition, you can obtain more information about the attestation cases.

### ***To display attestation cases***

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity whose attestation cases you want to display.

4. In the **Edit Identity** pane, click the **Attestation** tab.  
This displays all the identity's attestation cases.
5. (Optional) To display more details of an attestation case, click **Details** next to the attestation case.

## Related topics

- [Attestation](#) on page 85
- [Displaying pending attestation cases](#) on page 104

## Approving and denying attestation cases of my identities

You can grant or deny approval to attestation cases of identities for which you are responsible.

### *To approve an attestation case*

1. Open the home page.
  2. On the home page, click **Show** in the **My Direct Reports** tile.
  3. On the **Identities** page, click the identity whose attestation cases you want decide approval on.
  4. In the **Edit Identity** pane, click the **Attestation** tab.
  5. On the **Attestation** tab, click ▼ (**Filter**).
  6. In the filter context menu, select the **Pending** option.
  7. Perform one of the following actions:
    - To approve an attestation case, in the list, select the check box next to the attestation case and click **Approve** below the list.
    - To deny an attestation case, in the list, select the check box next to the attestation case and click **Deny** below the list.
  8. (Optional) In the **Approve Attestation Case** or the **Deny Attestation Case** pane, perform the following actions:
    - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
    - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.
- TIP:** By giving reasons, your approvals are more transparent and support the audit trail.
9. Click **Save**.

## Related topics

- [Attestation](#) on page 85
- [Granting or denying attestation cases](#) on page 105

## Marking my identities as security risks

You can mark identities that you manage as a security risk. Then the user accounts and resources of the affected identity are blocked.

### *To mark an identity as a security risk*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity you want to mark as a security risk.
4. In the **Edit Identity** pane, toggle the switch next to **Identity poses a security risk**.
5. In the **Mark Identity as Security Risk** dialog, confirm the prompt with **Yes**.  
The text next to the switch changes to **Identity poses a security risk**.
6. Click **Save**.

## Related topics

- [Displaying and editing my identities' main data](#) on page 136

## Revoking my identities' security risks

If identities that you manage have been flagged as a security risk, you can remove this flag again. Then the affected identity regains access to user accounts and resources.

### *To revoke an identity's security risk*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the relevant identity.
4. In the **Edit Identity** pane, toggle the switch next to **Identity poses a security risk**.
5. In the **Resolve Security Risk** dialog, confirm the prompt with **Yes**.  
The text next to the switch changes to **Identity does not pose a security risk**.
6. Click **Save**.

## Related topics

- [Displaying and editing my identities' main data](#) on page 136

# Creating passcodes for my identities

If identities, for which you are responsible, have forgotten their password for logging into the Web Portal and the passwords cannot be reset with the question and answer feature, you can create passcodes for them. With this passcode, identities can log on to the Password Reset Portal once and for a limited time.

### *To create a passcode for an identity*

1. Open the home page.
2. On the home page, click **Show** in the **My Direct Reports** tile.
3. On the **Identities** page, click the identity for which you want to create the passcode.
4. In the **Edit Identity Data** pane, click **Create passcode**.  
The generated passcode and its validity are displayed in a dialog.
5. Note or copy the code and have it sent to the identity.

# Managing my cost centers

You can perform a variety of actions on cost centers that you manage and gather information about them.

### Detailed information about this topic

- [Displaying my cost centers](#) on page 144
- [Displaying and editing my cost center main data](#) on page 145
- [Managing my cost center memberships](#) on page 146
- [Managing my cost centers' entitlements](#) on page 149

# Displaying my cost centers

You can display all the cost centers for which you are responsible.

### *To display cost centers*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.



This opens the **Cost Centers** page and displays all the cost centers for which you are responsible.

## Displaying and editing my cost center main data

You can edit the main data of the cost centers for which you are responsible.

### *To display and edit a cost center's main data*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose main data you want to show/edit, click **Edit**.
4. In the **Edit Cost Center** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 21: Cost center main data**

Property	Description
Cost center	Enter a full, descriptive name for the cost center.
Short name	Enter a short name for the cost center.
Parent cost center	Click <b>Assign/Change</b> and select a cost center to be the parent cost center for organizing the cost center hierarchically. If you want the cost center at the root of a cost center hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the cost center.
2nd Manager	Select an identity to act as a deputy to the cost center's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the cost center.
Department	Click <b>Assign/Change</b> and select the department that the cost center is primarily assigned to.
Location	Click <b>Assign/Change</b> and select the location the cost center is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the cost center.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the cost center.
Description	Enter a description for the cost center.

5. Click **Save**.

## Managing my cost center memberships

As soon as an identity is assigned to a cost center, the identity becomes a member in the cost center.

## Detailed information about this topic

- [Displaying memberships in my cost centers](#) on page 147
- [Analyzing assignments to my cost centers](#) on page 147
- [Adding identities to my cost centers](#) on page 148
- [Removing identities from my cost centers](#) on page 149

## Displaying memberships in my cost centers

You can display identities that are assigned cost centers for which you are responsible.

### *To display identities that are assigned a cost center*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose memberships you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To display all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to my cost centers

You can see how a cost center assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose memberships you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Adding identities to my cost centers

You can assign identities to cost centers for which you are responsible. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To add an identity to a cost center*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center you want to add an identity to, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the cost center.
8. Click **Request memberships**.
9. Close the **Edit Cost Center** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the cost center.

### *To re-add an excluded member*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center you want to add again, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

## Removing identities from my cost centers

You can remove cost centers from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### *To remove a cost center from an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center with a membership you want to delete, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## Managing my cost centers' entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to cost centers you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the cost centers.

### Detailed information about this topic

- [Displaying my cost center entitlements](#) on page 149
- [Adding entitlements to my cost centers](#) on page 150
- [Deleting my cost center entitlements](#) on page 150

## Displaying my cost center entitlements

You can display entitlements that are assigned cost centers for which you are responsible.

### ***To display entitlements***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose entitlements you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Permissions** tab.

## **Adding entitlements to my cost centers**

You can add entitlements to cost centers for which you are responsible. You do this through requests.

### ***To add an entitlement to a cost center***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center you want to add an entitlement to, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Cost Center** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the cost center.

### **Related topics**

- [Requesting products](#) on page 50

## **Deleting my cost center entitlements**

You can delete entitlements that are assigned cost centers for which you are responsible.

### ***To delete an entitlement of a cost center***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose entitlement you want to delete, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Entitlements** tab.
5. On the **Permissions** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. Confirm the prompt with **Yes** in the dialog.

## **Managing my locations**

You can perform a variety of actions on locations that you manage and gather information about them.

### **Detailed information about this topic**

- [Displaying my locations](#) on page 151
- [Displaying and editing my locations' main data](#) on page 151
- [Managing my location memberships](#) on page 153
- [Managing my locations' entitlements](#) on page 155

## **Displaying my locations**

You can display all the locations for which you are responsible.

### ***To display locations***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.  
This opens the **Locations** page and displays all the locations for which you are responsible.

## **Displaying and editing my locations' main data**

You can edit the main data of the locations for which you are responsible.

### ***To display and edit a location's main data***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location whose main data you want to show/edit, click **Edit**.
4. In the **Edit Location** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 22: Location main data**

<b>Property</b>	<b>Description</b>
Location	Enter a full, descriptive name for the location.
Short name	Enter a short name for the location.
Name	Enter an additional description for the location.
Parent location	Click <b>Assign/Change</b> and select a location to be the parent location for organizing the location hierarchically. If you want the location at the root of a location hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the location.
2nd Manager	Select an identity to act as a deputy to the location's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the location.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the location.
Department	Click <b>Assign/Change</b> and select the department the location is primarily assigned to.
Cost center	Click <b>Assign/Change</b> and select the cost center the location is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the location.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the location.
Description	Enter a description for the location.

5. Click **Save**.



# Managing my location memberships

As soon as an identity is assigned to a location, the identity becomes a member in the location.

## Detailed information about this topic

- [Displaying memberships in my locations](#) on page 153
- [Analyzing assignments to my locations](#) on page 153
- [Adding identities to my locations](#) on page 154
- [Removing identities from my locations](#) on page 155

## Displaying memberships in my locations

You can display identities that are assigned locations for which you are responsible.

### *To display identities that are assigned a location*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location whose memberships you want to display, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To display all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to my locations

You can see how a location assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location whose memberships you want to display, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.

6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Adding identities to my locations

You can assign identities to locations for which you are responsible. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To add an identity to a location*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location you want to add an identity to, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the location.
8. Click **Request memberships**.
9. Close the **Edit Location** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the location.

### *To re-add an excluded member*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location you want to add again, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

## Removing identities from my locations

You can remove locations from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### *To remove a location from an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location with a membership you want to delete, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## Managing my locations' entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to locations you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the locations.

### Detailed information about this topic

- [Displaying my locations' entitlements](#) on page 155
- [Adding entitlements to my locations](#) on page 156
- [Deleting my locations' entitlements](#) on page 156

## Displaying my locations' entitlements

You can display entitlements that are assigned locations for which you are responsible.

### ***To display entitlements***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
3. On the **Locations** page, next to the location whose entitlements you want to display, click **Edit**.
4. In the **Edit Locations** pane, click the **Permissions** tab.

## **Adding entitlements to my locations**

You can add entitlements to locations for which you are responsible. You do this through requests.

### ***To add an entitlement to a location***

1. Open the home page.
  2. On the Home page, in the **My Responsibilities** tile, click **Locations**.
  3. On the **Locations** page, next to the location you want to add an entitlement to, click **Edit**.
  4. In the **Edit Locations** pane, click the **Entitlements** tab.
  5. On the **Entitlements** tab, click **Request entitlements**.
  6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
  7. Next to the entitlement you want to add, select the check box.
  8. Click **Apply**.
  9. Close the **Edit Location** pane.
  10. In the menu bar, click **Requests > Shopping cart**.
  11. On the **Shopping Cart** page, click **Submit**.
- After the request has been granted approval, the entitlement is added to the location.

### **Related topics**

- [Requesting products](#) on page 50

## **Deleting my locations' entitlements**

You can delete entitlements that are assigned locations for which you are responsible.

### ***To delete an entitlement of a location***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **Locations**.

3. On the **Locations** page, next to the location whose entitlement you want to delete, click **Edit**.
4. In the **Edit Locations** pane, click the **Entitlements** tab.
5. On the **Permissions** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. Confirm the prompt with **Yes** in the dialog.

## Managing my 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.

You can carry out various actions on the system entitlements that you manage and obtain information about them.

You could manage the following system entitlements:

- Active Directory groups
- SAP groups
- SharePoint groups
- PAM groups

### Detailed information about this topic

- [Displaying my system entitlements](#) on page 157
- [Displaying and editing my system entitlements' main data](#) on page 158
- [Creating reports about my system entitlements](#) on page 159
- [Making my system entitlements requestable](#) on page 160
- [Managing my system entitlements' service items](#) on page 161
- [Managing my system entitlement memberships](#) on page 164
- [Managing my system entitlements' child groups](#) on page 167
- [Managing my system entitlements' attestation cases](#) on page 167

## Displaying my system entitlements

You can display all the system entitlements for which you are responsible.

### ***To display system entitlements***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.

This opens the **System Entitlements** page and displays all the system entitlements for which you are responsible.

## **Displaying and editing my system entitlements' main data**

You can edit the main data of the system entitlements for which you are responsible.

### ***To display and edit a system entitlement's main data***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlements whose main data you want to display/edit.
4. In the **Edit System Entitlement** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 23: System entitlement main data**

Property	Description
Name	Enter a full, descriptive name for the system entitlement.
Canonical name	Shows the automatically generated canonical name of the system entitlement.
Distinguished name	Shows the automatically generated distinguished name of the system entitlement.
Display name	Enter a name for displaying the system entitlement in the One Identity Manager tools.
Notes domain	Shows the Notes domain name.
Description	Enter a description for the system entitlement.
Category	Select the category for system entitlement inheritance. User accounts can inherit system entitlements selectively. To do this, system entitlements and user accounts are divided into categories.
IT shop	Enable this check box to allow the system entitlement to be requested through the IT Shop. This system entitlement can be requested by your identities through the Web Portal and granted through a defined approval process. The system entitlement can still be assigned directly to identities and hierarchical roles. For detailed information about IT Shop, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Only use in IT Shop	Enable the check box to allow the system entitlement to be requested through the IT Shop if required. This system entitlement can be requested by your identities through the Web Portal and granted using a defined approval process. The system entitlement may not be assigned directly to hierarchical roles.

5. Click **Save**.

## Creating reports about my system entitlements

You can create reports about system entitlement data.

### ***To create a report about a system entitlement***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.

3. On the **System Entitlements** page, click the system entitlement for which you want to create a report.
4. In the **Edit Details** pane, click **Download report**.

## Making my system entitlements requestable

To be able to request a system entitlements in the Web Portal, the system entitlement must fulfill the following prerequisites:

- The system entitlement must be assigned to a service item (see [Managing my system entitlements' service items](#) on page 161).
- The system entitlement must be assigned to a shelf in a shop (see [Adding products to shelves](#) on page 40).
- The system entitlement must be marked as requestable (see following step-by-step).

### ***To make a system entitlement requestable***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. (Optional) To display only those system entitlements only that are not marked as requestable, perform the following actions:
  - a. Click **▼ (Filter)**.
  - b. In the filter context menu, select the **Not requestable** check box.
4. In the list, select the check box in front of the system entitlement that you want to make requestable.
5. Under the list, set the switch to **Make selected items requestable** and click **Update**.

**TIP:** If you do not want the system entitlement to be requested in the Web Portal anymore, set the switch to **Make selected items not requestable**.

### **Related topics**

- [Managing shops](#) on page 31
- [Managing my system entitlements' service items](#) on page 161
- [Adding products to shelves](#) on page 40

## Specifying my system entitlement owners

You can specify which identities are responsible for your system entitlements. To do this, you must assign one or more product owners to the service item assigned to the system entitlement.



### ***To specify owners for a system entitlement***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose owners you want to specify.
4. In the **Edit System Entitlement** pane, click the **Service Item** tab.
5. On the **Service Item** tab, perform one of the following actions:
  - To specify members of a specific application role as product owners, perform the following under **Product owners**:
    1. Enable the **Select from roles** option.
    2. In the **Product owner** field, click **Assign/Change**.
    3. In the **Edit Product Owner** pane, click the appropriate application role.
  - To specify a specific identity as the product owner, perform the following under **Product owners**:
    1. Enable the **Select from identities** option.
    2. In the **Identity** list, select the corresponding identity.
6. Click **Save**.

## **Managing my system entitlements' service items**

To be able to request system entitlements as products, they are assigned to corresponding service items. Then you can assign these service items to a shop (see [Managing requestable products in shops](#) on page 40).

### **Detailed information about this topic**

- [Specifying my system entitlement owners](#) on page 160
- [Editing my system entitlements' service items](#) on page 161

## **Editing my system entitlements' service items**

You can edit the main data of service items.

### ***To display and edit a service items role's main data***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose service item you want to edit.

4. In the **Edit System Entitlement** pane, click the **Details** tab.
5. On the **Service Item** tab, edit the service item's main data.

**Table 24: Main data of system entitlement service items**

Property	Description
Service item	Enter a name for the service item.
Description	Enter a description of the service item.
Service category	<p>You can group different service items into service categories. To do this, click <b>Assign/Change</b> and select the service category to which you want to assign the service item.</p> <p>For more information about service categories, see <a href="#">Managing service categories</a> on page 41.</p>
Approval policy	Select the approval policy used to determine the approver when the service item is requested in the Web Portal.
Max. days valid	<p>Specify how long an identity can keep the product until it is automatically unsubscribed again.</p> <p>An identity keeps their requested products on the shelf until they unsubscribe from them themselves. Sometimes, however, products are only required for a certain length of time and can be canceled automatically after this time. Products that are intended to have a limited shelf life need to be marked with a validity period.</p>
Web page	<p>Specify the URL of a web page that contains more information about the product. Use the following format: <b>https://www.example.com</b> or <b>http://www.example.com</b>.</p> <p>This field allows you to link product descriptions in the internet or intranet to the service item.</p>
Sort order	Specify how the service category is sorted.
Request property	<p>Select the request property using the additional request parameters that are defined for a request. If you do not select any request properties, the request properties of the associated service category are used.</p> <p>Requests can be given additional information though product-specific request properties such as the specific details of a product, its size, or color. A request property gathers all additional features together that can be given</p>

Property	Description
	when requesting a product.
Functional area	<p>Click <b>Assign/Change</b> and then select the functional area to which you want to assign the service item.</p> <p>You can use One Identity Manager to assess the risk of assignments. The assessments can be evaluated separately by functional area. To do this, service items must be assigned to functional areas. For more information, see the <i>One Identity Manager Risk Assessment Administration Guide</i>.</p>
Attestor	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service item.
Terms of use	Select the terms of use that the product's requester must accept.
Picture	<p>Enter a picture for the service item. Users see this picture when they make a request.</p> <p>Perform the following actions as well:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add/Change</b>.</li> <li>2. Select an image from your medium.</li> </ol>
Request parameters must be defined per recipient	Select the check box to enter additional request properties separately for each recipient of this product, if the product is requested for different recipients in one request procedure.
Retain service item assignment on relocation	<p>Select the check box if requests for this service item are retained when a customer or the product is moved.</p> <p>If an identity requests a product from a Shop and changes the Shop at a later date, a decision must be made about how to proceed with the existing request. The same applies if a product is moved to another shelf.</p>
Tags	Enter tags for the product. These tags can be used as search criteria by requests in the Web Portal.
Not requestable/Requestable	<p>Set the switch to <b>Requestable</b> if you want to request system entitlements through the Web Portal.</p> <p>Set the switch to <b>Not requestable</b> if you do not want to request system entitlements through the Web Portal.</p> <p>For more information, see <a href="#">Making system entitlements requestable</a> on page 189.</p>

Property	Description
Product owner	<p>Product owners can edit service item's main data and, be included in approval procedures as approvers for requests of this service item.</p> <p>Specify which identities are responsible for the service item.</p> <ul style="list-style-type: none"> <li>To specify members of a specific application role as product owners, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>Enable the <b>Select from roles</b> option.</li> <li>In the <b>Product owner</b> field, click <b>Assign/Change</b>.</li> <li>In the <b>Edit Product Owner</b> pane, click the appropriate application role.</li> </ol> </li> <li>To specify a specific identity as the product owner, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>Enable the <b>Select from identities</b> option.</li> <li>In the <b>Identity</b> list, select the corresponding identity.</li> </ol> </li> </ul>

6. Click **Save**.

## Related topics

- [Assigning owners to system entitlements](#) on page 178

# Managing my system entitlement memberships

As soon as a system entitlement has been assigned to an identity using a corresponding user account, the identity becomes a member in the system entitlement.

## Detailed information about this topic

- [Displaying memberships in my system entitlements](#) on page 165
- [Analyzing assignments to my system entitlements](#) on page 165
- [Assigning identities to my system entitlements](#) on page 165
- [Removing identities from my system entitlements](#) on page 166

## Displaying memberships in my system entitlements

You can display identities that are assigned system entitlements for which you are responsible.

### *To display identities that are assigned a system entitlement*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose memberships you want to display.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. (Optional) To display all memberships that were created directly in the selected system entitlement, click **Direct memberships**.
6. (Optional) To display all memberships created by inheritance from child system entitlements, click **Inherited memberships**.

## Analyzing assignments to my system entitlements

You can see how a system entitlement assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose memberships you want to display.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Direct memberships** or **Inherited memberships**.
6. Next to the appropriate membership, click **View assignment analysis**.

## Assigning identities to my system entitlements

You can assign identities to system entitlements for which you are responsible. You do this through requests.

### *To assign a system entitlement to an identity*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.

3. On the **System Entitlements** page, click the system entitlement to which you want to assign an identity.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Request memberships**.
6. In the **Select Identities** pane, select the check box next to the identity you want to assign to the system entitlement.
7. Click **Apply**.
8. Close the **Edit System Entitlement** pane.
9. In the menu bar, click **Requests > Shopping cart**.
10. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the system entitlement.

### ***To re-add an excluded member***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click .
3. In the pane, click the **Memberships** tab.
4. On the **Memberships** tab, click **Excluded members**.
5. Select the check box in front of the identity you want to add again as a member.
6. Click **Remove exclusion**.

### **Related topics**

- [Requesting products](#) on page 50

## **Removing identities from my system entitlements**

You can remove system entitlements from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### ***To remove a system entitlement from an identity***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement with a membership you want to delete.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Direct Memberships**.
6. Select the check box next to the membership you want to delete.
7. Perform one of the following actions:

- If it is a direct assignment, click **Delete**.
- If it is an indirect assignment, click **Unsubscribe**.

**NOTE:** You can only unsubscribe memberships that you have requested yourself.

8. In the **Delete Memberships** or **Unsubscribe Memberships** dialog, confirm the prompt with **OK**.

## Managing my system entitlements' child groups

You can order more groups under certain group types or order these under other groups:

- Active Directory groups
- LDAP groups
- Notes groups
- Custom target systems groups

### Detailed information about this topic

- [Display my system entitlements' child groups](#) on page 167

## Display my system entitlements' child groups

You can see all groups that are child groups of the system entitlements for which You are responsible.

### *To display the child groups of a system entitlement*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose child groups you want to display.
4. In the **Edit System Entitlement** pane, click the **Child System Entitlements** tab.

## Managing my system entitlements' attestation cases

You can use attestation to test the balance between security and compliance within your company. Managers or others responsible for compliance can use One Identity Manager attestation functionality to certify correctness of permissions, requests, or exception approvals either scheduled or on demand. Recertification is the term generally used to describe regular certification of permissions. One Identity Manager uses the same workflows for recertification and attestation.

There are attestation policies defined in One Identity Manager for carrying out attestations. Attestation policies specify which objects are attested when, how often, and by whom. Once an attestation is performed, One Identity Manager creates attestation cases that contain all the necessary information about the attestation objects and the attestor responsible. The attestor checks the attestation objects. They verify the correctness of the data and initiate any changes that need to be made if the data conflicts with internal rules.

Attestation cases record the entire attestation sequence. Each attestation step in an attestation case can be audit-proof reconstructed. Attestations are run regularly using scheduled tasks. You can also trigger single attestations manually.

Attestation is complete when the attestation case has been granted or denied approval. You specify how to deal with granted or denied attestations on a company basis.

### Detailed information about this topic

- [Displaying my system entitlements' attestation cases](#) on page 168
- [Approving and denying my system entitlements' attestation cases](#) on page 168

## Displaying my system entitlements' attestation cases

You can display attestation cases that involve system entitlements for which you are responsible.

In addition, you can obtain more information about the attestation cases.

### *To display attestation cases*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose attestation cases you want to display.
4. In the **Edit System Entitlement** pane, click the **Attestation** tab.  
This displays all the system entitlement's attestation cases.
5. (Optional) To display more details of an attestation case, click **Details** next to the attestation case.

### Related topics

- [Attestation](#) on page 85
- [Displaying pending attestation cases](#) on page 104

## Approving and denying my system entitlements' attestation cases

You can grant or deny approval to attestation cases of system entitlements for which you are responsible.



### **To approve an attestation case**

1. Open the home page.
  2. On the Home page, in the **My Responsibilities** tile, click **System entitlements**.
  3. On the **System Entitlements** page, click the system entitlement whose attestation cases are pending your approval.
  4. In the **Edit System Entitlement** pane, click the **Attestation** tab.
  5. On the **Attestation** tab, click **▼ (Filter)**.
  6. In the filter context menu, select the **Pending** option.
  7. Perform one of the following actions:
    - To approve an attestation case, in the list, select the check box next to the attestation case and click **Approve** below the list.
    - To deny an attestation case, in the list, select the check box next to the attestation case and click **Deny** below the list.
  8. (Optional) In the **Approve Attestation Case** or the **Deny Attestation Case** pane, perform the following actions:
    - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
    - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.
- TIP:** By giving reasons, your approvals are more transparent and support the audit trail.
9. Click **Save**.

### **Related topics**

- [Attestation](#) on page 85
- [Granting or denying attestation cases](#) on page 105

## **Managing my system roles**

System roles combine company resources that must always be assigned to identities together into a single package. Different types of company resources can be grouped into one system role, such as Active Directory groups, software, and resources. System roles can be assigned to user accounts, requested, or inherited through hierarchical roles. Employees and workdesks inherit company resources assigned to the system roles.

You can perform a variety of actions regarding system roles that you manage and gather information about them.

## Detailed information about this topic

- [Displaying my system roles](#) on page 170
- [Displaying and editing my system roles' main data](#) on page 170
- [Managing my system role memberships](#) on page 171
- [Managing my system roles' entitlements](#) on page 174

## Displaying my system roles

You can display all the system roles for which you are responsible.

### *To display system roles*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.  
This opens the **System Roles** page and displays all the system roles for which you are responsible.

## Displaying and editing my system roles' main data

You can edit the main data of the system roles for which you are responsible.

### *To display and edit a system role's main data*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role whose main data you want to show/edit, click **Edit**.
4. In the **Edit System Role** pane, make your changes in the corresponding fields.

You can edit the following main data.

**Table 25: System role main data**

Property	Description
System role	Enter a full, descriptive name for the system role.
Display name	Enter a name for displaying the system role in the One Identity Manager tools.
Internal product name	Enter a company internal name for the system role.
System role type	Select the role type of the system role. The system role type specifies which type of company resources make up the system role.
Service item	Shows you the associated service item.
System role manager	Click <b>Change</b> and select the identity responsible for the system role. This identity can edit the system role's main data and be used as an attestor for system role properties. If the system role can be requested in the IT Shop, the manager will automatically be a member of the application role for product owners assigned the service item.
Comment	Enter a comment for the system role.
IT shop	Select the check box if the system role can also be requested through the IT Shop. This system role can be requested by identities through the Web Portal and the request granted by a defined approval process. The system role can still be assigned directly to identities and hierarchical roles. For detailed information about IT Shop, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Only use in IT Shop	Select the check box if the system role can only be requested through the IT Shop. This system role can be requested by identities through the Web Portal and the request granted by a defined approval process. The system role may not be assigned directly to hierarchical roles.

5. Click **Save**.

## Managing my system role memberships

As soon as a system role is assigned to an identity, the identity becomes a member in the system role.

## Detailed information about this topic

- [Displaying memberships in my system roles](#) on page 172
- [Analyzing assignments to my system roles](#) on page 172
- [Assigning identities to my system roles](#) on page 172
- [Removing identities from my system roles](#) on page 173

## Displaying memberships in my system roles

You can display identities that are assigned system roles for which you are responsible.

### *To display identities that are assigned a system role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role whose memberships you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.

## Analyzing assignments to my system roles

You can see how a system role assignment under your responsibility came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role whose memberships you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, select the check box next to the corresponding membership.
6. Click **View assignment analysis**.

## Assigning identities to my system roles

You can assign identities to system roles for which you are responsible. You do this through requests.

### ***To assign a system role to an identity***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role you want to add an identity to, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Request memberships**.
6. In the **Select Identities** pane, select the check box next to the identity you want to assign to the system role.
7. Click **Request memberships**.
8. Close the **Edit System Role** pane.
9. In the menu bar, click **Requests > Shopping cart**.
10. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the system role.

### ***To re-add an excluded member***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click .
3. In the pane, click the **Memberships** tab.
4. On the **Memberships** tab, click **Excluded members**.
5. Select the check box in front of the identity you want to add again as a member.
6. Click **Remove exclusion**.

### **Related topics**

- [Requesting products](#) on page 50

## **Removing identities from my system roles**

You can remove system roles from identities, for which you are responsible, by deleting or unsubscribing the relevant memberships.

### ***To remove a system role from an identity***

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role with a membership you want to delete, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.

5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.

## Managing my system roles' entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. Assigning identities to system roles avoids you having to assign entitlements separately to each identity. All a system role's entitlements are automatically assigned to all the identities assigned to the system role.

### Detailed information about this topic

- [Displaying my system roles' entitlements](#) on page 174
- [Adding entitlements to my system roles](#) on page 174
- [Deleting my system roles' entitlements](#) on page 175

## Displaying my system roles' entitlements

You can display entitlements that are assigned system roles for which you are responsible.

### *To display entitlements*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role whose entitlements you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Permissions** tab.

## Adding entitlements to my system roles

You can add entitlements to system roles for which you are responsible. You do this through requests.

### *To add an entitlement to a system role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role you want to add an entitlement to, click **Edit**.
4. In the **Edit System Role** pane, click the **Entitlements** tab.

5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit System Role** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the system role.

## Related topics

- [Requesting products](#) on page 50

## Deleting my system roles' entitlements

You can delete entitlements that are assigned system roles for which you are responsible.

### *To delete an entitlement of a system role*

1. Open the home page.
2. On the Home page, in the **My Responsibilities** tile, click **System roles**.
3. On the **System Roles** page, next to the system role whose entitlement you want to delete, click **Edit**.
4. In the **Edit System Role** pane, click the **Entitlements** tab.
5. On the **Permissions** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. Confirm the prompt with **Yes** in the dialog.

## Delegating tasks

You can temporarily delegate role memberships and responsibilities (and associated entitlements and duties) to other identities.

For example, if you go on vacation, you can hand over responsibility for a department and the associated tasks to a deputy.

Role memberships and responsibilities can also be delegated to you.

**| NOTE:** In the Web Portal, a delegation is treated like a request.

## Detailed information about this topic

- [Displaying delegations](#) on page 176
- [Creating delegations](#) on page 176
- [Canceling delegations](#) on page 177
- [Deleting delegations](#) on page 177

# Displaying delegations

You can see delegations created by you or by others for you.

### *To display delegations*

1. In the menu bar, click **Requests** > **Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, select the **My delegations** check box.
4. (Optional) To see more details of a delegation, click **Details** next to the corresponding delegation.

# Creating delegations

You can delegate role memberships and responsibilities to other identities.

**NOTE:** You cannot edit a delegation afterward. If you want to make a change to the delegation, delete the it (see [Deleting delegations](#) on page 177) and create a new delegation.

### *To create a delegation*

1. In the menu bar, click **Responsibilities** > **Delegation**.
2. On the **Create Delegation** page, in the **Delegation recipient** field, select the identity to which you want to delegate.
3. Click **Next**.
4. In the **Select the type of delegation** step, perform one of the following actions:
  - To delegate all memberships and responsibilities (grouped by topic), set **Delegate all memberships and responsibilities**.
  - To delegate individual memberships and responsibilities, set **Select individual memberships and responsibilities to delegate**.
5. Click **Next**.
6. In the **Select the role membership/responsibility you want to delegate** step, in the list, select the check boxes in front of the role memberships/responsibilities you want to delegate.



7. Click **Next**.
8. In the **Add additional information** set, configure the following settings:
  - **Valid from:** Specify from when the role/responsibility will be delegated.
  - **Valid until:** Specify until when the role/responsibility will be delegated.
  - **Notify me if the recipient of the delegation makes a decision:** (Optional) Select the check box if you want to be notified when the recipient makes an approval decision about a delegated role/responsibility.
  - **The recipient can delegate this role:** (Optional) Select the check box to specify that the recipient can delegate their delegated role/responsibility on to another identity.
  - **Reason:** (Optional) In the dialog, enter a reason for the delegation.
  - **Priority:** (Optional) In the menu, select a priority for the delegation.
9. Click **Save**.

## Canceling delegations

You can cancel delegations that you have already set up.

**NOTE:** You can only cancel delegations as long they have the **Request** or **Approved** status. You can delete delegations with the **Assigned** status (see [Deleting delegations](#) on page 177).

### *To cancel a delegation*

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click ▼ (**Filter**).
3. In the filter context menu, select the **My delegations** check box.
4. Next to the delegation you want to cancel, click **Details**.
5. In the **View Request Details** pane, click **Cancel request**.
6. (Optional) In the **Cancel request** pane, in the **Reason for your decision** field, enter a reason for the cancellation.
7. Click **Save**.

## Deleting delegations

You can delete delegations that you created. That is, responsibilities that you have delegated to others become your responsibility again.

**NOTE:** You can only delete delegations as long as they have the **Assigned** status. You can cancel delegations that have the **Request** or **Approved** status (see [Canceling delegations](#) on page 177).

### ***To delete a delegation***

1. In the menu bar, click **Requests > Request History**.
2. On the **Request History** page, click **▼ (Filter)**.
3. In the filter context menu, select the **My delegations** check box.
4. Next to the delegation you want to delete, click **Details**.
5. In the **View Request Details** pane, click **Unsubscribe product**.
6. In the **Unsubscribe Product** pane, perform the following actions:
  - a. In the **Unsubscribed as from** field, specify the date on which to delete the delegation. If you leave this field empty, the delegation is deleted once you have clicked **Saved**.
  - b. In the **Reason for your decision** field, enter a reason for your approval decision.
  - c. In the **Additional comments about your decision** field, enter extra information.
  - d. Click **Save**.

## **Ownerships**

You can assign business objects to owners or assume ownership of them.

### **Detailed information about this topic**

- [Assigning owners to system entitlements](#) on page 178

## **Assigning owners to system entitlements**

You can specify who is responsible for a system entitlement. To do this, you define a product owner for the service item that is assigned to the system entitlement. You can also take responsibility for system entitlement yourself.

### ***To assign system entitlements to an owner***

1. In the menu bar, click **Responsibilities > System entitlement ownership**.
2. On the **Assign an Owner for a System Entitlement** page, in the **System entitlement** menu, select the system entitlement that you want to assign a owner to.
3. Click **Next**.
4. In the second step, perform one of the following actions:

- To assume ownership yourself, click **I want to take ownership of this system entitlement**.
- To specify another identity as the owner, click **Select another owner** or **Select from the suggested possible owners** and select the identity in the **Designated owner** menu.

5. Click **Next**.

In the context of an attestation, the selected owner can confirm that this assignment is correct (see [Pending attestations](#) on page 104).

## Managing data

The Web Portal provides you with comprehensive functionality for managing the following objects.

- Identities
- User accounts
- System entitlements
- Departments
- Locations
- Cost centers
- Business roles
- System roles

### Detailed information about this topic

- [Managing identities](#) on page 180
- [Managing user accounts](#) on page 187
- [Managing system entitlements](#) on page 188
- [Managing departments](#) on page 204
- [Managing locations](#) on page 210
- [Managing cost centers](#) on page 216
- [Managing business roles](#) on page 222
- [Managing system roles](#) on page 228

## Managing identities

You can use the Web Portal to manage identities.

## Detailed information about this topic

- [Displaying identities](#) on page 181
- [Displaying identities' application roles](#) on page 181
- [Displaying identities' system entitlements](#) on page 182
- [Displaying identities' user accounts](#) on page 182
- [Managing attestation cases of identities](#) on page 184
- [Assigning other managers to identities](#) on page 183
- [Deactivating identities](#) on page 182
- [Reactivating identities](#) on page 183
- [Deleting identities](#) on page 185
- [Creating reports about identities](#) on page 183
- [Marking identities as security risks](#) on page 186

# Displaying identities

You can display any of the identities and their details.

### *To display identities*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **Identities**.  
This opens the **Identities** page and displays all the identities.
3. (Optional) To display details of an identity, click it in the list.

# Displaying identities' application roles

You can display application roles assigned to identities.

### *To display an identity's application roles*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity whose application roles you want to display.
4. In the **Edit Identity** pane, click the **Application Roles** tab.

# Displaying identities' system entitlements

You can display system entitlements assigned to identities.

## *To display an identity's system entitlements*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity whose system entitlements you want to display.
4. In the **Edit Identity** pane, click the **System Entitlements** tab.

# Displaying identities' user accounts

You can display user accounts assigned to identities.

## *To display an identity's user accounts*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity whose user accounts you want to display.
4. In the **Edit Identity** pane, click the **User accounts** tab.

# Deactivating identities

You can deactivate identities permanently such as when an employee leaves a company. This may be necessary to strip these identities of their permissions in the connected target system and from their company resources.

Effects of permanent deactivating an identity are:

- The identity cannot be assigned to identities as a manager.
- The identity cannot be assigned to roles as a supervisor.
- The identity cannot be assigned to attestation policies as an owner.
- The identity's user accounts are locked or deleted and then removed from group memberships.

## *To deactivate an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.

3. On the **Identities** page, click the identity you want to deactivate.
4. In the **Edit Identity** pane, set the switch to **Deactivated**.
5. Click **Save**.

## Reactivating identities

You can activate permanently deactivated identities if they have not been deactivated by certification.

### *To reactivate an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity you want to activate.
4. In the **Edit Identity** pane, set the switch to **Activated**.
5. Click **Save**.

## Assigning other managers to identities

You can assign managers to identities or remove the currently assigned manager.

### *To assign a manager to an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity that you want to assign to a new manager.
4. In the **Edit Identity** pane, perform one of the following actions:
  - In the **Manager** menu, click the manager you want to assign to the identity.
  - To remove the current manager, click **✕ (Remove assignment)**.
5. Click **Save**.

### Related topics

- [Datenprobleme anzeigen und beheben](#)

## Creating reports about identities

You can create reports about identity data.

### ***To create a report about an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity for which you want to create a report.
4. In the **Edit Identity**, click **Download report**.

## **Managing attestation cases of identities**

You can use the Web Portal to display all the attestation cases for identities and make approval decisions about them.

### **Detailed information about this topic**

- [Displaying attestation cases of identities](#) on page 184
- [Approving and denying attestation cases of identities](#) on page 185

## **Displaying attestation cases of identities**

You can see all the identities' attestation cases. In addition, you can obtain more information about the attestation cases.

### ***To display attestation cases of an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity whose attestation cases you want to display.
4. In the **Edit Identity** pane, click the **Attestation** tab.  
This displays all the identity's attestation cases.
5. (Optional) To display more details of an attestation case, click **Details** next to the attestation case.

### **Related topics**

- [Attestation](#) on page 85
- [Displaying pending attestation cases](#) on page 104



# Approving and denying attestation cases of identities

You can grant or deny approval to attestation cases of identities.

## *To approve an attestation case*

1. In the menu bar click **Data administration > Data Explorer**.
  2. In the Data Explorer navigation, click **Identities**.
  3. In the list, click the identity whose attestation cases you want to decide approval on.
  4. In the **Edit Identity** pane, click the **Attestation** tab.
  5. On the **Attestation** tab, click **▼ (Filter)**.
  6. In the filter context menu, select the **Pending** option.
  7. Perform one of the following actions:
    - To approve an attestation case, in the list, select the check box next to the attestation case and click **Approve** below the list.
    - To deny an attestation case, in the list, select the check box next to the attestation case and click **Deny** below the list.
  8. (Optional) In the **Approve Attestation Case** or the **Deny Attestation Case** pane, perform the following actions:
    - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
    - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.
- TIP:** By giving reasons, your approvals are more transparent and support the audit trail.
9. Click **Save**.

## Related topics

- [Attestation](#) on page 85
- [Granting or denying attestation cases](#) on page 105

# Deleting identities

When an identity is deleted, they are tested to see if user accounts and company resources are still assigned, or if there are still pending requests. The identity is marked for deletion and therefore locked out of further processing. Before an identity is permanently deleted from the database, you must remove all company resource assignments and finalize all requests. If no more company resources are assigned, the identity is deleted permanently.

### ***To delete an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity you want to delete.
4. In the **Edit Identity** pane, click **Delete**.
5. In the **Delete Identity** dialog, confirm the prompt with **Yes**.

## **Marking identities as security risks**

You can mark identities as a security risk. Then the user accounts and resources of the affected identity are blocked.

### ***To mark an identity as a security risk***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity you want to mark as a security risk.
4. In the **Edit Identity** pane, toggle the switch next to **Identity poses a security risk**.
5. In the **Mark Identity as Security Risk** dialog, confirm the prompt with **Yes**.  
The text next to the switch changes to **Identity poses a security risk**.
6. Click **Save**.

## **Revoking identities' security risks**

If identities have been flagged as a security risk, you can remove this flag again. Then the affected identity regains access to user accounts and resources.

### ***To revoke an identity's security risk***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the relevant identity.
4. In the **Edit Identity** pane, toggle the switch next to **Identity poses a security risk**.
5. In the **Resolve Security Risk** dialog, confirm the prompt with **Yes**.  
The text next to the switch changes to **Identity does not pose a security risk**.
6. Click **Save**.

# Displaying identity risk indexes

You can see identities risk indexes.

**NOTE:** For more detailed information about risk assessment, see the *One Identity Manager Risk Assessment Administration Guide*.

## To display an identity's risk index

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **Identities** page, click the identity whose risk index you want to display.
4. In the **Edit Identity** pane, click **(Actions) > Analyze risks**.

# Managing user accounts

You can use the Web Portal to manage user accounts.

User accounts represent a target system's authentication objects. A user account obtains the permissions required for accessing target system resources through its memberships in system entitlements.

A user account can be linked to an identity in One Identity Manager. However, you can also manage user accounts separately from identities.

## Detailed information about this topic

- [Displaying user accounts](#) on page 187
- [Displaying user account memberships](#) on page 188

# Displaying user accounts

You can see any of the user accounts and their details.

## To display user accounts

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **User accounts**.  
This opens the **User accounts** page and displays all the user accounts.
3. (Optional) To display details of a user account, click it in the list.

# Managing user account memberships

As soon as a system entitlement is assigned to a user account, the user account becomes a member in the system entitlement.

## Detailed information about this topic

- [Displaying user account memberships](#) on page 188

## Displaying user account memberships

You can display which system entitlements are assigned to certain user accounts.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **User accounts**.
3. In the list, click the user account whose memberships you want to display.
4. In the **Edit User Account** pane, click the **Memberships** tab.

**TIP:** If you click a system entitlement in the list, you will see more information and options (see [Managing system entitlements](#) on page 188).

## Creating reports about user accounts

You can create reports about user account data.

### *To create a report about a user account*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **User Accounts** page, click the user account for which you want to create a report.
4. In the **Edit User Account**, click **Download report**.

## Managing system entitlements

You can use the Web Portal to manage 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.

### Detailed information about this topic

- [Displaying system entitlements](#) on page 189
- [Creating reports about system entitlements](#) on page 204
- [Editing system entitlement service items](#) on page 196
- [Managing system entitlement memberships](#) on page 199
- [Managing system entitlement child groups](#) on page 201
- [Managing attestation cases of system entitlements](#) on page 202
- [Making system entitlements requestable](#) on page 189

## Displaying system entitlements

You can see any of the system entitlements and their details.

### *To display system entitlements*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **System entitlements**.  
This opens the **System Entitlements** page and displays all the system entitlements.
3. (Optional) To display details of a system entitlement, click it in the list.

## Making system entitlements requestable

To be able to request a system entitlements in the Web Portal, the system entitlement must fulfill the following prerequisites:

- The system entitlement must be assigned to a service item (see [Managing service items for system entitlements](#) on page 193).
- The system entitlement must be assigned to a shelf in a shop (see [Adding products to shelves](#) on page 40).
- The system entitlement must be marked as requestable (see following step-by-step).

### *To make a system entitlement requestable*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.

3. (Optional) To display only those system entitlements only that are not marked as requestable, perform the following actions:
  - a. Click ▼ (**Filter**).
  - b. In the filter context menu, select the **Not requestable** check box.
4. In the list, select the check box in front of the system entitlement that you want to make requestable.
5. Under the list, set the switch to **Make selected items requestable** and click **Update**.

**TIP:** If you do not want the system entitlement to be requested in the Web Portal anymore, set the switch to **Make selected items not requestable**.

## Related topics

- [Managing shops](#) on page 31
- [Managing service items for system entitlements](#) on page 193
- [Adding products to shelves](#) on page 40

# Displaying and editing system entitlements main data

You can see and edit system entitlements' main data.

## *To display and edit a system entitlement's main data*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose main data you want to display.

4. In the **Edit System Entitlement** pane, make your changes in the relevant fields.

**Table 26: System entitlement main data**

Property	Description
Name	Enter a full, descriptive name for the system entitlement.
Canonical name	Shows the automatically generated canonical name of the system entitlement.
Distinguished name	Shows the automatically generated distinguished name of the system entitlement.
Display name	Enter a name for displaying the system entitlement in the One Identity Manager tools.
Notes domain	Shows the Notes domain name.
Description	Enter a description for the system entitlement.
Category	Select the category for system entitlement inheritance. User accounts can inherit system entitlements selectively. To do this, system entitlements and user accounts are divided into categories.
IT shop	Enable this check box to allow the system entitlement to be requested through the IT Shop. This system entitlement can be requested by your identities through the Web Portal and granted through a defined approval process. The system entitlement can still be assigned directly to identities and hierarchical roles. For detailed information about IT Shop, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Only use in IT Shop	Enable the check box to allow the system entitlement to be requested through the IT Shop if required. This system entitlement can be requested by your identities through the Web Portal and granted using a defined approval process. The system entitlement may not be assigned directly to hierarchical roles.

5. Click **Save**.

## Specifying system entitlement owners

You can specify which identities are responsible for system entitlements. To do this, you must assign one or more product owners to the service item assigned to the system entitlement.

### ***To specify owners for a system entitlement***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose owners you want to specify.
4. In the **Edit System Entitlement** pane, click the **Service Item** tab.
5. On the **Service Item** tab, perform one of the following actions:
  - To specify members of a specific application role as product owners, perform the following under **Product owners**:
    1. Enable the **Select from roles** option.
    2. In the **Product owner** field, click **Assign/Change**.
    3. In the **Edit Product Owner** pane, click the appropriate application role.
  - To specify a specific identity as the product owner, perform the following under **Product owners**:
    1. Enable the **Select from identities** option.
    2. In the **Identity** list, select the corresponding identity.
6. Click **Save**.

### ***To specify owners for several system entitlements***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, select the check box in front of the system entitlements whose owners you want to specify.
4. Click **Assign product owner**.
5. In the **Assign Product Owner** pane, perform the following actions:
  - To specify members of a specific application role as product owners, perform the following under **Product owners**:
    1. Enable the **Select from roles** option.
    2. In the **Product owner** field, click **Assign/Change**.
    3. In the **Edit Product Owner** pane, click the appropriate application role.
  - To specify a specific identity as the product owner, perform the following under **Product owners**:
    1. Enable the **Select from identities** option.
    2. In the **Identity** list, select the corresponding identity.
6. Click **Apply**.



# Managing service items for system entitlements

To be able to request system entitlements as products, they are assigned to corresponding service items. Then you can assign these service items to a shop (see [Managing requestable products in shops](#) on page 40).

## Detailed information about this topic

- [Creating service items for system entitlements](#) on page 193
- [Specifying system entitlement owners](#) on page 191
- [Editing system entitlement service items](#) on page 196

## Creating service items for system entitlements

You can create service items for system entitlements.

### *To create a service item for a system entitlement*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement for which you want to create a service item.
4. In the **Edit System Entitlements** area, click the **Details** tab.
5. On the **Details** tab, click **Create service item**.
6. Click **Service Item** tab.
7. On the **Service Item** tab, edit the service item's main data.

**Table 27: Main data of system entitlement service items**

Property	Description
Service item	Enter a name for the service item.
Description	Enter a description of the service item.
Service category	You can group different service items into service categories. To do this, click <b>Assign/Change</b> and select the service category to which you want to assign the service item. For more information about service categories, see <a href="#">Managing service categories</a> on page 41.

Property	Description
Approval policy	Select the approval policy used to determine the approver when the service item is requested in the Web Portal.
Max. days valid	<p>Specify how long an identity can keep the product until it is automatically unsubscribed again.</p> <p>An identity keeps their requested products on the shelf until they unsubscribe from them themselves. Sometimes, however, products are only required for a certain length of time and can be canceled automatically after this time. Products that are intended to have a limited shelf life need to be marked with a validity period.</p>
Web page	<p>Specify the URL of a web page that contains more information about the product. Use the following format: <b>https://www.example.com</b> or <b>http://www.example.com</b>.</p> <p>This field allows you to link product descriptions in the internet or intranet to the service item.</p>
Sort order	Specify how the service category is sorted.
Request property	<p>Select the request property using the additional request parameters that are defined for a request. If you do not select any request properties, the request properties of the associated service category are used.</p> <p>Requests can be given additional information though product-specific request properties such as the specific details of a product, its size, or color. A request property gathers all additional features together that can be given when requesting a product.</p>
Functional area	<p>Click <b>Assign/Change</b> and then select the functional area to which you want to assign the service item.</p> <p>You can use One Identity Manager to assess the risk of assignments. The assessments can be evaluated separately by functional area. To do this, service items must be assigned to functional areas. For more information, see the <i>One Identity Manager Risk Assessment Administration Guide</i>.</p>
Attestor	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service item.

Property	Description
Terms of use	Select the terms of use that the product's requester must accept.
Picture	<p>Enter a picture for the service item. Users see this picture when they make a request.</p> <p>Perform the following actions as well:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add/Change</b>.</li> <li>2. Select an image from your medium.</li> </ol>
Request parameters must be defined per recipient	Select the check box to enter additional request properties separately for each recipient of this product, if the product is requested for different recipients in one request procedure.
Retain service item assignment on relocation	<p>Select the check box if requests for this service item are retained when a customer or the product is moved.</p> <p>If an identity requests a product from a Shop and changes the Shop at a later date, a decision must be made about how to proceed with the existing request. The same applies if a product is moved to another shelf.</p>
Tags	Enter tags for the product. These tags can be used as search criteria by requests in the Web Portal.
Not requestable/Requestable	<p>Set the switch to <b>Requestable</b> if you want to request system entitlements through the Web Portal.</p> <p>Set the switch to <b>Not requestable</b> if you do not want to request system entitlements through the Web Portal.</p> <p>For more information, see <a href="#">Making system entitlements requestable</a> on page 189.</p>
Product owner	<p>Product owners can edit service item's main data and, be included in approval procedures as approvers for requests of this service item.</p> <p>Specify which identities are responsible for the service item.</p> <ul style="list-style-type: none"> <li>• To specify members of a specific application role as product owners, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>1. Enable the <b>Select from roles</b> option.</li> <li>2. In the <b>Product owner</b> field, click <b>Assign/Change</b>.</li> <li>3. In the <b>Edit Product Owner</b> pane, click the</li> </ol> </li> </ul>

Property	Description
	<p>appropriate application role.</p> <ul style="list-style-type: none"> <li>To specify a specific identity as the product owner, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>Enable the <b>Select from identities</b> option.</li> <li>In the <b>Identity</b> list, select the corresponding identity.</li> </ol> </li> </ul>

- Click **Save**.

## Editing system entitlement service items

You can edit the main data of service items.

### *To display and edit a service items role's main data*

- In the menu bar click **Data administration > Data Explorer**.
- In the Data Explorer navigation, click **System entitlements**.
- On the **System Entitlements** page, click the system entitlement whose service item you want to edit.
- In the **Edit System Entitlement** pane, click the **Details** tab.
- On the **Service Item** tab, edit the service item's main data.

**Table 28: Main data of system entitlement service items**

Property	Description
Service item	Enter a name for the service item.
Description	Enter a description of the service item.
Service category	<p>You can group different service items into service categories. To do this, click <b>Assign/Change</b> and select the service category to which you want to assign the service item.</p> <p>For more information about service categories, see <a href="#">Managing service categories</a> on page 41.</p>
Approval policy	Select the approval policy used to determine the approver when the service item is requested in the Web Portal.
Max. days valid	Specify how long an identity can keep the product until it is automatically unsubscribed again.

Property	Description
	An identity keeps their requested products on the shelf until they unsubscribe from them themselves. Sometimes, however, products are only required for a certain length of time and can be canceled automatically after this time. Products that are intended to have a limited shelf life need to be marked with a validity period.
Web page	Specify the URL of a web page that contains more information about the product. Use the following format: <b>https://www.example.com</b> or <b>http://www.example.com</b> .  This field allows you to link product descriptions in the internet or intranet to the service item.
Sort order	Specify how the service category is sorted.
Request property	Select the request property using the additional request parameters that are defined for a request. If you do not select any request properties, the request properties of the associated service category are used.  Requests can be given additional information through product-specific request properties such as the specific details of a product, its size, or color. A request property gathers all additional features together that can be given when requesting a product.
Functional area	Click <b>Assign/Change</b> and then select the functional area to which you want to assign the service item.  You can use One Identity Manager to assess the risk of assignments. The assessments can be evaluated separately by functional area. To do this, service items must be assigned to functional areas. For more information, see the <i>One Identity Manager Risk Assessment Administration Guide</i> .
Attestor	Click <b>Assign/Change</b> and then select an application role. Members of this application role can approve attestation cases that affect the service item.
Terms of use	Select the terms of use that the product's requester must accept.
Picture	Enter a picture for the service item. Users see this picture when they make a request.  Perform the following actions as well:

Property	Description
	<ol style="list-style-type: none"> <li>1. Click <b>Add/Change</b>.</li> <li>2. Select an image from your medium.</li> </ol>
Request parameters must be defined per recipient	Select the check box to enter additional request properties separately for each recipient of this product, if the product is requested for different recipients in one request procedure.
Retain service item assignment on relocation	<p>Select the check box if requests for this service item are retained when a customer or the product is moved.</p> <p>If an identity requests a product from a Shop and changes the Shop at a later date, a decision must be made about how to proceed with the existing request. The same applies if a product is moved to another shelf.</p>
Tags	Enter tags for the product. These tags can be used as search criteria by requests in the Web Portal.
Not requestable/Requestable	<p>Set the switch to <b>Requestable</b> if you want to request system entitlements through the Web Portal.</p> <p>Set the switch to <b>Not requestable</b> if you do not want to request system entitlements through the Web Portal.</p> <p>For more information, see <a href="#">Making system entitlements requestable</a> on page 189.</p>
Product owner	<p>Product owners can edit service item's main data and, be included in approval procedures as approvers for requests of this service item.</p> <p>Specify which identities are responsible for the service item.</p> <ul style="list-style-type: none"> <li>• To specify members of a specific application role as product owners, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>1. Enable the <b>Select from roles</b> option.</li> <li>2. In the <b>Product owner</b> field, click <b>Assign/Change</b>.</li> <li>3. In the <b>Edit Product Owner</b> pane, click the appropriate application role.</li> </ol> </li> <li>• To specify a specific identity as the product owner, perform the following under <b>Product owners</b>: <ol style="list-style-type: none"> <li>1. Enable the <b>Select from identities</b> option.</li> <li>2. In the <b>Identity</b> list, select the corresponding identity.</li> </ol> </li> </ul>

6. Click **Save**.

### Related topics

- [Assigning owners to system entitlements](#) on page 178

## Managing system entitlement memberships

As soon as a system entitlement has been assigned to an identity using a corresponding user account, the identity becomes a member in the system entitlement.

### Detailed information about this topic

- [Displaying system entitlement memberships](#) on page 199
- [Analyzing assignments to system entitlements](#) on page 199
- [Assigning identity system entitlements](#) on page 200
- [Removing system entitlements from identities](#) on page 201

## Displaying system entitlement memberships

You can display which identities are assigned to certain system entitlements.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. In the list, click the system entitlement whose memberships you want to display.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. (Optional) To display all memberships that were created directly in the selected system entitlement, click **Direct memberships**.
6. (Optional) To display all memberships created by inheritance from child system entitlements, click **Inherited memberships**.

## Analyzing assignments to system entitlements

You can see how a system entitlement assignment came about by displaying an assignment analysis for the corresponding membership.

### ***To display the assignment analysis for a membership***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose memberships you want to display.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Direct memberships** or **Inherited memberships**.
6. Next to the appropriate membership, click **View assignment analysis**.

## **Assigning identity system entitlements**

You can assign system entitlements to identities. You do this through requests.

### ***To assign a system entitlement to an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement to which you want to assign an identity.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Request memberships**.
6. In the **Select Identities** pane, select the check box next to the identity you want to assign to the system entitlement.
7. Click **Apply**.
8. Close the **Edit System Entitlement** pane.
9. In the menu bar, click **Requests > Shopping cart**.
10. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the system entitlement.

### ***To re-add an excluded member***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click .
3. In the pane, click the **Memberships** tab.
4. On the **Memberships** tab, click **Excluded members**.
5. Select the check box in front of the identity you want to add again as a member.
6. Click **Remove exclusion**.



## Related topics

- [Requesting products](#) on page 50

# Removing system entitlements from identities

You can remove system entitlements from identities by deleting or unsubscribing the relevant memberships.

### *To remove a system entitlement from an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement with a membership you want to delete.
4. In the **Edit System Entitlement** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Direct Memberships**.
6. Select the check box next to the membership you want to delete.
7. Perform one of the following actions:
  - If it is a direct assignment, click **Delete**.
  - If it is an indirect assignment, click **Unsubscribe**.
8. In the **Delete Memberships** or **Unsubscribe Memberships** dialog, confirm the prompt with **OK**.

**NOTE:** You can only unsubscribe memberships that you have requested yourself.

# Managing system entitlement child groups

You can order more groups under certain group types or order these under other groups:

- Active Directory groups
- LDAP groups
- Notes groups
- Custom target systems groups

### Detailed information about this topic

- [Displaying system entitlement child groups](#) on page 202

# Displaying system entitlement child groups

You can see child groups of system entitlements.

## *To display the child groups of a system entitlement*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose child groups you want to display.
4. In the **Edit System Entitlement** pane, click the **Child System Entitlements** tab.

# Managing attestation cases of system entitlements

You can use the Web Portal to display all the attestation cases for system entitlements and make approval decisions about them.

## Detailed information about this topic

- [Displaying attestation cases of system entitlements](#) on page 202
- [Approving and denying attestation cases of system entitlements](#) on page 203

# Displaying attestation cases of system entitlements

You can see all the system entitlements' attestation cases. In addition, you can obtain more information about the attestation cases.

## *To display attestation cases of a system entitlement*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. On the **System Entitlements** page, click the system entitlement whose attestation cases you want to display.
4. In the **Edit System Entitlement** pane, click the **Attestation** tab.  
This displays all the system entitlement's attestation cases.
5. (Optional) To display more details of an attestation case, click **Details** next to the attestation case.

## Related topics

- [Attestation](#) on page 85
- [Displaying pending attestation cases](#) on page 104

# Approving and denying attestation cases of system entitlements

You can grant or deny approval to attestation cases of system entitlements.

## *To approve an attestation case*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System entitlements**.
3. In the list, click the system entitlement whose attestation case is pending your approval.
4. In the **Edit System Entitlement** pane, click the **Attestation** tab.
5. On the **Attestation** tab, click ▼ (**Filter**).
6. In the filter context menu, select the **Pending** option.
7. Perform one of the following actions:
  - To approve an attestation case, in the list, select the check box next to the attestation case and click **Approve** below the list.
  - To deny an attestation case, in the list, select the check box next to the attestation case and click **Deny** below the list.
8. (Optional) In the **Approve Attestation Case** or the **Deny Attestation Case** pane, perform the following actions:
  - a. In the **Reason for your decision** field, select a standard reason for your approval decision.
  - b. (Optional) In the **Additional comments about your decision** field, enter extra information about your approval decision.

**TIP:** By giving reasons, your approvals are more transparent and support the audit trail.

9. Click **Save**.

## Related topics

- [Attestation](#) on page 85
- [Granting or denying attestation cases](#) on page 105

# Creating reports about system entitlements

You can create reports about system entitlement data.

## *To create a report about a system entitlement*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Identities**.
3. On the **System Entitlements** page, click the system entitlement for which you want to create a report.
4. In the **Edit System Entitlement**, click **Download report**.

# Managing departments

You can use the Web Portal to manage departments.

## Detailed information about this topic

- [Displaying departments](#) on page 204
- [Displaying and editing department main data](#) on page 204
- [Managing department memberships](#) on page 206
- [Managing department entitlements](#) on page 208

# Displaying departments

You can see any of the departments and their details.

## *To display departments*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **Departments**.  
This opens the **Departments** page and displays all the departments.
3. (Optional) To display details of a department, next to the department, click **Edit**.

# Displaying and editing department main data

You can see and edit departments' main data.

### ***To display and edit a department's main data***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. On the **Departments** page, next to the department whose main data you want to display, click **Edit**.
4. In the **Edit Department** pane, make your changes in the relevant fields.

**Table 29: Department main data**

<b>Property</b>	<b>Description</b>
Department	Enter a full, descriptive name for the department.
Short name	Enter a short name for the department.
Object ID	Enter a unique object ID for the department. For example, the object ID is required in SAP systems for assigning identities to departments.
Parent department	Click <b>Assign/Change</b> and select a department to be the parent department for organizing the department hierarchically. If you want the department at the root of a department hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the department.
2nd Manager	Select an identity to act as a deputy to the department's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Location	Click <b>Assign/Change</b> and select the location the cost center is primarily assigned to.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the department.
Cost center	Click <b>Assign/Change</b> and select the location the department is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the department.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the department.
Description	Enter a description for the department.

5. Click **Save**.

# Managing department memberships

As soon as an identity is assigned to a department, the identity becomes a member in the department.

## Detailed information about this topic

- [Displaying department memberships](#) on page 206
- [Analyzing assignments to departments](#) on page 206
- [Adding identities to departments](#) on page 207
- [Removing identities from departments](#) on page 208

## Displaying department memberships

You can display which identities are assigned to certain departments.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. In the list, next to the department whose memberships you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To view all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to departments

You can see how a department assignment came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. On the **Departments** page, next to the department whose memberships you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.

5. On the **Memberships** tab, click **Secondary memberships**.
6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Adding identities to departments

You can add identities to departments. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To add an identity to a department*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. On the **Departments** page, next to the department you want to add an identity to, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the department.
8. Click **Request memberships**.
9. Close the **Edit Department** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the department.

### *To re-add an excluded member*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. On the **Departments** page, next to the department you want to add again, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

# Removing identities from departments

You can remove identities from departments by deleting the corresponding memberships.

### *To remove a department from an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. On the **Departments** page, next to the department with a membership you want to delete, click **Edit**.
4. In the **Edit Department** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

# Managing department entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to system roles you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the departments.

### Detailed information about this topic

- [Displaying department entitlements](#) on page 209
- [Adding entitlements to departments](#) on page 209
- [Deleting department entitlements](#) on page 209



## Displaying department entitlements

You can see entitlements assigned to departments.

### *To display entitlements*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. In the list, next to the department whose entitlements you want to display, click **Edit**.
4. In the **Edit Department** pane, click the **Entitlements** tab.

## Adding entitlements to departments

You can add entitlements to departments. You do this through a request.

### *To add an entitlement to a department*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. In the list, next to the department to which you want to add a entitlement, click **Edit**.
4. In the **Edit Department** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Department** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the department.

### Related topics

- [Requesting products](#) on page 50

## Deleting department entitlements

You can delete entitlements assigned to departments.

### ***To delete an entitlement from a department***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Departments**.
3. In the list, next to the department from which you want to delete an entitlement, click **Edit**.
4. In the **Edit Department** pane, click the **Entitlements** tab.
5. On the **Entitlement** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. In the dialog, confirm the prompt with **Yes**.

## **Managing locations**

You can use the Web Portal to manage locations.

### **Detailed information about this topic**

- [Displaying locations](#) on page 210
- [Displaying and editing location main data](#) on page 210
- [Managing location memberships](#) on page 212
- [Managing location entitlements](#) on page 214

## **Displaying locations**

You can see any of the locations and their details.

### ***To display locations***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **Locations**.  
This opens the **Locations** page and displays all the locations.
3. (Optional) To display details of a location, next to the location, click **Edit**.

## **Displaying and editing location main data**

You can see and edit locations' main data.

### ***To display and edit a location's main data***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. On the **Locations** page, next to the location whose main data you want to display, click **Edit**.
4. In the **Edit Location** pane, make your changes in the relevant fields.

**Table 30: Location main data**

<b>Property</b>	<b>Description</b>
Location	Enter a full, descriptive name for the location.
Short name	Enter a short name for the location.
Name	Enter an additional description for the location.
Parent location	Click <b>Assign/Change</b> and select a location to be the parent location for organizing the location hierarchically. If you want the location at the root of a location hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the location.
2nd Manager	Select an identity to act as a deputy to the location's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the location.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the location.
Department	Click <b>Assign/Change</b> and select the department the location is primarily assigned to.
Cost center	Click <b>Assign/Change</b> and select the cost center the location is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the location.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the location.
Description	Enter a description for the location.

5. Click **Save**.

# Managing location memberships

As soon as an identity is assigned to a location, the identity becomes a member in the location.

## Detailed information about this topic

- [Displaying location memberships](#) on page 212
- [Analyzing assignments to locations](#) on page 212
- [Adding identities to locations](#) on page 213
- [Removing identities from locations](#) on page 214

## Displaying location memberships

You can display which identities are assigned to certain locations.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. In the list, next to the location whose memberships you want to display, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To view all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to locations

You can see how a location assignment came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. On the **Locations** page, next to the location whose memberships you want to display, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.

6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Adding identities to locations

You can add identities to locations. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To add an identity to a location*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. On the **Locations** page, next to the location you want to add an identity to, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the location.
8. Click **Request memberships**.
9. Close the **Edit Location** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the location.

### *To re-add an excluded member*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. On the **Locations** page, next to the location you want to add again, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

# Removing identities from locations

You can remove identities from locations by deleting the corresponding memberships.

## *To remove a location from an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. On the **Locations** page, next to the location with a membership you want to delete, click **Edit**.
4. In the **Edit Location** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

# Managing location entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to locations you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the locations.

## Detailed information about this topic

- [Displaying location entitlements](#) on page 214
- [Adding entitlements to locations](#) on page 215
- [Deleting entitlements from locations](#) on page 215

# Displaying location entitlements

You can see entitlements assigned to locations.

### ***To display entitlements***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. In the list, next to the location whose entitlements you want to display, click **Edit**.
4. In the **Edit Location** pane, click the **Entitlements** tab.

## **Adding entitlements to locations**

You can add entitlements to locations. You do this through a request.

### ***To add an entitlement to a location***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.
3. In the list, next to the location to which you want to add a entitlement, click **Edit**.
4. In the **Edit Location** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Location** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the location.

### **Related topics**

- [Requesting products](#) on page 50

## **Deleting entitlements from locations**

You can delete entitlements assigned to locations.

### ***To delete an entitlement from a location***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Locations**.

3. In the list, next to the location from which you want to delete an entitlement, click **Edit**.
4. In the **Edit Location** pane, click the **Entitlements** tab.
5. On the **Entitlement** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. In the dialog, confirm the prompt with **Yes**.

## Managing cost centers

You can use the Web Portal to manage cost centers.

### Detailed information about this topic

## Displaying cost centers

You can see any of the cost centers and their details.

### *To display cost centers*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **Cost centers**.  
This opens the **Cost centers** page and displays all the cost centers.
3. (Optional) To display details of a cost center, next to the cost center, click **Edit**.

## Displaying and editing cost center main data

You can see and edit cost centers' main data.

### *To display and edit a cost center's main data*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose main data you want to display, click **Edit**.



4. In the **Edit Cost Center** pane, make your changes in the relevant fields.

**Table 31: Cost center main data**

Property	Description
Cost center	Enter a full, descriptive name for the cost center.
Short name	Enter a short name for the cost center.
Parent cost center	Click <b>Assign/Change</b> and select a cost center to be the parent cost center for organizing the cost center hierarchically. If you want the cost center at the root of a cost center hierarchy, leave the field empty.
Manager	Select the manager who is responsible for the cost center.
2nd Manager	Select an identity to act as a deputy to the cost center's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Attestors	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role can approve attestation cases for the cost center.
Department	Click <b>Assign/Change</b> and select the department that the cost center is primarily assigned to.
Location	Click <b>Assign/Change</b> and select the location the cost center is primarily assigned to.
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the cost center.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the cost center.
Description	Enter a description for the cost center.

5. Click **Save**.

## Managing cost center memberships

As soon as an identity is assigned to a cost center, the identity becomes a member in the cost center.

## Detailed information about this topic

- [Displaying cost center memberships](#) on page 218
- [Analyzing assignments to cost centers](#) on page 218
- [Adding identities to cost centers](#) on page 219
- [Removing identities from cost centers](#) on page 219

## Displaying cost center memberships

You can display which identities are assigned to certain cost centers.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. In the list, next to the cost center whose memberships you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To view all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to cost centers

You can see how a cost center assignment came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center whose memberships you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

# Adding identities to cost centers

You can add identities to cost centers. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

## *To add an identity to a cost center*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center you want to add an identity to, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the cost center.
8. Click **Request memberships**.
9. Close the **Edit Cost Center** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the cost center.

## *To re-add an excluded member*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center you want to add again, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.
6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

# Removing identities from cost centers

You can remove identities from cost centers by deleting the corresponding memberships.

### ***To remove a cost center from an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. On the **Cost Centers** page, next to the cost center with a membership you want to delete, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

## **Managing cost center entitlements**

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. By assigning entitlements to cost centers you avoid having to assign entitlements separately to each identity because all the identities are automatically assigned to the cost centers.

### **Detailed information about this topic**

- [Displaying cost center entitlements](#) on page 220
- [Adding entitlements to cost centers](#) on page 221
- [Deleting cost center entitlements](#) on page 221

## **Displaying cost center entitlements**

You can see entitlements assigned to cost centers.

### ***To display entitlements***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. In the list, next to the cost center whose entitlements you want to display, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Entitlements** tab.

# Adding entitlements to cost centers

You can add entitlements to cost centers. You do this through a request.

## *To add an entitlement to a cost center*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. In the list, next to the cost center to which you want to add a entitlement, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Cost Center** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the cost center.

## Related topics

- [Requesting products](#) on page 50

# Deleting cost center entitlements

You can delete entitlements assigned to cost centers.

## *To delete an entitlement from a cost center*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Cost centers**.
3. In the list, next to the cost center from which you want to delete an entitlement, click **Edit**.
4. In the **Edit Cost Center** pane, click the **Entitlements** tab.
5. On the **Entitlement** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. In the dialog, confirm the prompt with **Yes**.

# Managing business roles

You can use the Web Portal to manage business roles.

## Detailed information about this topic

- [Displaying business roles](#) on page 222
- [Displaying and editing business role main data](#) on page 222
- [Managing business role memberships](#) on page 224
- [Managing business role entitlements](#) on page 226

## Displaying business roles

You can see any of the business roles and their details.

### *To display business roles*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **Business roles**.  
This opens the **Business Roles** page and displays all the business roles.
3. (Optional) To view details of a business role, next to the business role, click **Edit**.

## Displaying and editing business role main data

You can see and edit the system roles' main data.

### *To display and edit a business role's main data*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. On the **Business Roles** page, next to the business role whose main data you want to display, click **Edit**.

4. In the **Edit Business Roles** pane, make your changes in the relevant fields.

**Table 32: Business role main data**

Property	Description
Business role	Enter a full, descriptive name for the business role.
Short name	Enter a short name for the business role.
Internal name	Enter a company internal name for the business role.
Description	Enter a description for the business role.
Role class	<p>When you create the business role: Select the role class of the business role.</p> <p>To differentiate between different business roles, define company specific role classes. Role classes are used to specify which company resource assignments are possible through roles in a role class.</p>
Parent business role	Click <b>Assign/Change</b> and select a business role to be the parent business role for organizing the business role hierarchically. If you want the business role at the root of a business role hierarchy, leave the field empty.
Role type	<p>Select the role type of the business role.</p> <p>Role types are mainly used to regulate approval policy inheritance.</p>
Role approver	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the business role.
Role approver (IT)	Click <b>Assign/Change</b> and select an application role. Members of the selected application role can approve requests for members of the business role.
Manager	Select the manager who is responsible for the business role.
2nd Manager	Select an identity to act as a deputy to the business role's manager.
Additional manager	Click <b>Assign/Change</b> and select a cost center. Members of the selected application role are responsible for the department.
Employees do not inherit	Select this check box if you want to temporarily prevent identities from inheriting this business role.
Comment	Enter a comment for the business role.

5. Click **Save**.

# Managing business role memberships

As soon as a business role is assigned to an identity, the identity becomes a member in the business role.

## Detailed information about this topic

- [Displaying business role memberships](#) on page 224
- [Analyzing assignments to business roles](#) on page 224
- [Assigning identities to business roles](#) on page 225
- [Removing business roles from identities](#) on page 226

## Displaying business role memberships

You can display which identities are assigned to certain business roles.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. In the list, next to the business role whose memberships you want to display, click **Edit**.
4. In the **Edit Business Roles** pane, click the **Memberships** tab.
5. (Optional) To display all primary memberships, click **Primary memberships**.
6. (Optional) To view all secondary memberships, click **Secondary memberships**.
7. (Optional) To display all members who were originally assigned through a dynamic role but have been excluded, click **Excluded members**.

## Analyzing assignments to business roles

You can assign business roles to identities. The business role is then assigned through a request by displaying an assignment analysis for the corresponding membership.

You can see how a business role assignment came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.



3. On the **Business Roles** page, next to the business role whose memberships you want to display, click **Edit**.
4. In the **Edit Business Roles** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Next to the corresponding membership, select the check box.
7. Click **View assignment analysis**.

## Assigning identities to business roles

You can assign business roles to identities. You do this through requests.

In addition, you can re-add members who were originally assigned through a dynamic role but were excluded by removing the exclusion.

### *To assign a business role to an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. On the **Business Roles** page, next to the business role you want to add an identity to, click **Edit**.
4. In the **Edit Business Roles** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary memberships**.
6. Click **Request memberships**.
7. In the **Select Identities** pane, select the check box next to the identity you want to assign to the business role.
8. Click **Request memberships**.
9. Close the **Edit Business Roles** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the business role.

### *To re-add an excluded member*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. On the **Business Roles** page, next to the business role you want to add again, click **Edit**.
4. In the **Edit Business Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Excluded members**.

6. Select the check box in front of the identity you want to add again as a member.
7. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

# Removing business roles from identities

You can remove identities from business roles by deleting the corresponding memberships.

## *To remove a business role from an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. On the **Business Roles** page, next to the business role with a membership you want to delete, click **Edit**.
4. In the **Edit Business Roles** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.
9. (Optional) If the member was assigned through a dynamic role, perform the following actions:
  - a. (Optional) In the **Specify Reason for Exclusion** dialog, specify why you want to remove the member.
  - b. Click **Exclude members**.

# Managing business role entitlements

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. Assigning identities to business roles avoids you having to assign entitlements separately to each identity. All a business role's entitlements are automatically assigned to all the identities assigned to the business role.

## Detailed information about this topic

- [Displaying business role entitlements](#) on page 227
- [Adding entitlements to business roles](#) on page 227
- [Deleting business role entitlements](#) on page 227

# Displaying business role entitlements

You can see entitlements assigned to business roles.

## *To display entitlements*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. In the list, next to the business role whose entitlements you want to display, click **Edit**.
4. In the **Edit Business Role** pane, click the **Entitlements** tab.

# Adding entitlements to business roles

You can add entitlements to business roles. You do this through a request.

## *To add an entitlement to a business role*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. In the list, next to the business role to which you want to add a entitlement, click **Edit**.
4. In the **Edit Business Role** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit Business Role** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the business role.

## Related topics

- [Requesting products](#) on page 50

# Deleting business role entitlements

You can delete entitlements assigned to business roles.

### ***To delete an entitlement from a business role***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **Business roles**.
3. In the list, next to the business role from which you want to delete an entitlement, click **Edit**.
4. In the **Edit Business Role** pane, click the **Entitlements** tab.
5. On the **Entitlement** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. In the dialog, confirm the prompt with **Yes**.

## **Managing system roles**

You can use the Web Portal to manage system roles.

### **Detailed information about this topic**

- [Displaying system roles](#) on page 228
- [Displaying and editing system role main data](#) on page 228
- [Managing system role memberships](#) on page 230
- [Managing system role entitlements](#) on page 232

## **Displaying system roles**

You can see any of the system roles and their details.

### ***To display system roles***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation click **System roles**.  
This opens the **System Roles** page and displays all the System roles.
3. (Optional) To display details of a system role, click **Edit** next to the system role.

## **Displaying and editing system role main data**

You can see and edit the business roles' main data.

### To display and edit a system role's main data

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. On the **System Roles** page, next to the system role whose main data you want to display, click **Edit**.
4. In the **Edit System Role** pane, make your changes in the relevant fields.

**Table 33: System role main data**

Property	Description
System role	Enter a full, descriptive name for the system role.
Display name	Enter a name for displaying the system role in the One Identity Manager tools.
Internal product name	Enter a company internal name for the system role.
System role type	Select the role type of the system role. The system role type specifies which type of company resources make up the system role.
Service item	Shows you the associated service item.
System role manager	Click <b>Change</b> and select the identity responsible for the system role. This identity can edit the system role's main data and be used as an attestor for system role properties. If the system role can be requested in the IT Shop, the manager will automatically be a member of the application role for product owners assigned the service item.
Comment	Enter a comment for the system role.
IT shop	Select the check box if the system role can also be requested through the IT Shop. This system role can be requested by identities through the Web Portal and the request granted by a defined approval process. The system role can still be assigned directly to identities and hierarchical roles. For detailed information about IT Shop, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Only use in IT Shop	Select the check box if the system role can only be requested through the IT Shop. This system role can be requested by identities through the Web Portal and the request granted by a defined approval process. The system role may not be assigned directly to hierarchical roles.

5. Click **Save**.

# Managing system role memberships

As soon as a system role is assigned to an identity, the identity becomes a member in the system role.

## Detailed information about this topic

- [Displaying system role memberships](#) on page 230
- [Analyzing assignments to system roles](#) on page 230
- [Assigning identities to system roles](#) on page 231
- [Removing identities from my system roles](#) on page 231

## Displaying system role memberships

You can display which identities are assigned to certain system roles.

### *To display memberships*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. In the list, next to the system role whose memberships you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.

## Analyzing assignments to system roles

You can see how a system role assignment came about by displaying an assignment analysis for the corresponding membership.

### *To display the assignment analysis for a membership*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. On the **System Roles** page, next to the system role whose memberships you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, select the check box next to the corresponding membership.
6. Click **View assignment analysis**.

# Assigning identities to system roles

You can assign system roles to identities. You do this through requests.

## *To assign a system role to an identity*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. On the **System Roles** page, next to the system role you want to add an identity to, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Request memberships**.
6. In the **Select Identities** pane, select the check box next to the identity you want to assign to the system role.
7. Click **Request memberships**.
8. Close the **Edit System Role** pane.
9. In the menu bar, click **Requests > Shopping cart**.
10. On the **Shopping Cart** page, click **Submit**.

Once the request has been granted approval, the identity is assigned to the system role.

## *To re-add an excluded member*

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click .
3. In the pane, click the **Memberships** tab.
4. On the **Memberships** tab, click **Excluded members**.
5. Select the check box in front of the identity you want to add again as a member.
6. Click **Remove exclusion**.

## Related topics

- [Requesting products](#) on page 50

# Removing identities from my system roles

You can remove identities from system roles by deleting the corresponding memberships.

### ***To remove a system role from an identity***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. On the **System Roles** page, next to the system role with a membership you want to delete, click **Edit**.
4. In the **Edit System Role** pane, click the **Memberships** tab.
5. On the **Memberships** tab, click **Secondary Memberships**.
6. Select the check box next to the membership you want to delete.
7. Click **Remove**.
8. In the **Remove Memberships** pane, click **Remove memberships**.

## **Managing system role entitlements**

Identities can be assigned entitlements to different objects, such as, groups, accounts, roles, or applications. Assigning identities to system roles avoids you having to assign entitlements separately to each identity. All a system role's entitlements are automatically assigned to all the identities assigned to the system role.

### **Detailed information about this topic**

- [Displaying system role entitlements](#) on page 232
- [Adding entitlements to system roles](#) on page 232
- [Deleting system role entitlements](#) on page 233

## **Displaying system role entitlements**

You can see entitlements assigned to system roles.

### ***To display entitlements***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. In the list, next to the system role whose entitlements you want to display, click **Edit**.
4. In the **Edit System Role** pane, click the **Entitlements** tab.

## **Adding entitlements to system roles**

You can add entitlements to system roles. You do this through a request.



### ***To add an entitlement to a system role***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. In the list, next to the system role to which you want to add a entitlement, click **Edit**.
4. In the **Edit System Role** pane, click the **Entitlements** tab.
5. On the **Entitlements** tab, click **Request entitlements**.
6. In the **Request Entitlements** dialog, in the **Select the type of entitlement to add**, select which type of entitlement you want to add.
7. Next to the entitlement you want to add, select the check box.
8. Click **Apply**.
9. Close the **Edit System Role** pane.
10. In the menu bar, click **Requests > Shopping cart**.
11. On the **Shopping Cart** page, click **Submit**.

After the request has been granted approval, the entitlement is added to the system role.

### **Related topics**

- [Requesting products](#) on page 50

## **Deleting system role entitlements**

You can delete entitlements assigned to system roles.

### ***To delete an entitlement from a system role***

1. In the menu bar click **Data administration > Data Explorer**.
2. In the Data Explorer navigation, click **System roles**.
3. In the list, next to the system role from which you want to delete an entitlement, click **Edit**.
4. In the **Edit System Role** pane, click the **Entitlements** tab.
5. On the **Entitlement** tab, select the check box next to the entitlement you want to delete.
6. Click **Remove**.
7. In the dialog, confirm the prompt with **Yes**.

## Appendix: Attestation conditions and approval policies from attestation procedures



When attestation policies are created or edited (see [Setting up attestation policies](#) on page 88 or [Editing attestation policies](#) on page 90), you specify attestation conditions and approval policies:



- Attestation procedures specify which objects to attest. They define the properties of the attestation objects to attest.
- There are different attestation conditions for each attestation procedure that you use to specify which objects to attest.
- Attestors for each attestation case are determined by approval policies.

In the following chapter, you will find more information about the various attestation procedures and associated approval policies and attestation conditions.

### Attesting primary departments





Primary identity memberships in departments are attested using the **Primary department attestation** attestation procedure.

Condition	Description
All departments	Attests primary memberships in all departments.
Specific departments	Select the departments with primary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child departments	Select the departments with primary memberships to attest. In addition, primary memberships of all child departments under this

Condition	Description
	department are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Departments with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests primary memberships in departments with a risk index in the chosen range.
Departments with matching name	Enter part of a name of departments with primary memberships to attest. All departments that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.





## Attesting primary business roles

Primary identity memberships in business roles are attested using the **Primary business role attestation** attestation procedure.

Condition	Description
All business roles	Attests primary memberships in all business roles.
Specific business roles	Select the business roles with primary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child business roles	Select the business roles with primary memberships to attest. In addition, primary memberships of all child business roles under this business role are attested.  Use  and  to switch between hierarchical and list view. Multi-select is possible.
Business roles with specific role classes	Select the role classes. Attests primary membership in business roles with this role class.
Business roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests primary memberships in business roles with a risk index in the chosen range.
Business roles with matching name	Enter part of a name of business roles with primary memberships to attest. All business roles that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.





# Attesting primary cost centers

Primary identity memberships in cost centers are attested using the **Primary cost center attestation** attestation procedure.

Condition	Description
All cost centers	Attests primary memberships in all cost centers.
Specific cost centers	Select the cost centers with primary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child cost centers	Select the cost centers with primary memberships to attest. In addition, primary memberships of all child cost centers under this cost center are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Cost centers with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests primary memberships in cost centers with a risk index in the chosen range.
Cost centers with matching name	Enter part of a name of cost centers with primary memberships to attest. All cost centers that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

# Attesting primary locations





Primary identity memberships in locations are attested using the **Primary location attestation** attestation procedure.

Condition	Description
All locations	Attests primary memberships in all locations.
Specific locations	Select the locations with primary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child locations	Select the locations with primary memberships to attest. In addition, primary memberships of all child locations under this location are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.

Condition	Description
	possible.
Locations with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests primary memberships in locations with a risk index in the chosen range.
Locations with matching name	Enter part of a name of locations with primary memberships to attest. All locations that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.





## Attesting secondary departments

Secondary identity memberships in departments are attested using the **Secondary department attestation** attestation procedure.

Condition	Description
All departments	Attests secondary memberships in all departments.
Specific departments	Select the departments with secondary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child departments	Select the departments with secondary memberships to attest. In addition, secondary memberships of all child departments under this department are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Departments with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests secondary memberships in departments with a risk index in the chosen range.
Departments with matching name	Enter part of a name of departments with secondary memberships to attest. All departments that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.





# Attesting secondary cost centers

Secondary identity memberships in cost centers are attested using the **Secondary cost center attestation** attestation procedure.

Condition	Description
All cost centers	Attests secondary memberships in all cost centers.
Specific cost centers	Select the cost centers with secondary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child cost centers	Select the cost centers with secondary memberships to attest. In addition, secondary memberships of all child cost centers under this cost center are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Cost centers with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests secondary memberships in cost centers with a risk index in the chosen range.
Cost centers with matching name	Enter part of a name of cost centers with secondary memberships to attest. All cost centers that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

# Attesting secondary locations

Secondary identity memberships in locations are attested using the **Secondary location attestation** attestation procedure.

Condition	Description
All locations	Attests secondary memberships in all locations.
Specific locations	Select the locations with secondary memberships to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific child locations	Select the locations with secondary memberships to attest. In addition, secondary memberships of all child locations under this location are attested. Use  and  to switch between hierarchical and list view. Multi-select is possible.

Condition	Description
	possible.
Locations with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests secondary memberships in locations with a risk index in the chosen range.
Locations with matching name	Enter part of a name of locations with secondary memberships to attest. All locations that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM asset groups

PAM asset groups are attested using the **PAM asset group attestation** attestation procedure.

Condition	Description
All PAM asset groups	Attests all PAM assets groups.
Specific PAM asset groups	Select the PAM asset groups to attest.
PAM asset groups on specific systems	Select the PAM appliances with PAM asset groups to attest.
PAM asset groups with matching name	Enter part of a name of PAM asset groups with access to attest. All PAM asset groups that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM asset accounts

PAM asset accounts are attested using the **PAM asset account attestation** attestation procedure.

Condition	Description
All PAM asset accounts	Attests all PAM asset accounts.

Condition	Description
Specific PAN asset accounts	Select the PAM asset accounts to attest.
PAM asset accounts on specific systems	Select the PAM appliances with PAM asset accounts to attest.
PAM asset accounts with matching name	Enter part of a name of PAM asset accounts with access to attest. All PAM asset accounts that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM assets

PAM assets are attested using the **PAM asset attestation** attestation procedure.

Condition	Description
All PAM assets	Attests all PAM assets.
Specific PAM assets	Select the PAM assets to attest.
PAM assets on specific systems	Select the PAM appliances with PAM asset to attest.
PAM assets with matching name	Enter part of a name of PAM assets with access to attest. All PAM assets that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM user groups

PAM user groups are attested using the **PAM user group attestation** attestation procedure.

Condition	Description
All PAM user groups	Attests all PAM user groups.



Condition	Description
Specific PAM user groups	Select the PAM user groups to attest.
PAM user groups with matching name	Enter part of a name of PAM user groups with access to attest. All PAM user groups that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM user accounts

PAM user accounts are attested using the **PAM user account attestation** attestation procedure.

Condition	Description
All PAM user accounts	Attests all PAM user accounts.
Specific permissions	Select the permissions. Attests PAM user accounts with these permissions.
Specific PAM user accounts	Select the PAM user accounts to attest.
PAM user accounts in specific user groups	Select the user groups. Attests PAM user accounts that belong to these user groups.
PAM user groups on specific systems	Select the PAM appliances with PAM user groups to attest.
PAM user accounts mapped to specific employees	Select the identities. Attests PAM user accounts that are assigned these identities.
PAM user accounts with matching name	Enter part of a name of PAM user accounts with access to attest. All PAM user accounts that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

# Attesting PAM account groups

PAM account groups are attested using the **PAM account group attestation** attestation procedure.

Condition	Description
All PAM account groups	Attests all PAM account groups.
Specific PAM account groups	Select the PAM account groups to attest.
PAM user accounts on specific systems PAM account groups on specific systems	Select the PAM appliances with PAM user accounts to attest. Select the PAM appliances with PAM account groups to attest.
PAM account groups with matching name	Enter part of a name of PAM account groups with access to attest. All PAM account groups that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

# Attesting PAM directory accounts

PAM directory accounts are attested using the **PAM directory account attestation** attestation procedure.

Condition	Description
All PAM directory accounts	Attests all PAM directory accounts.
Specific PAM directory accounts	Select the PAM directory accounts to attest.
PAM directory accounts on specific direct-	Select the directories. Attests directory accounts that are found in this directory.

Condition	Description
ories	
PAM directory accounts with matching name	Enter part of a name of PAM directory accounts with access to attest. All PAM directory accounts that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting PAM accesses

PAM access are attested using the **PAM access attestation** attestation procedure.



Condition	Description
All PAM accesses	Attests all PAM access.
Specific PAN asset accounts	Select the PAM asset accounts with access to attest.
Specific PAM assets	Select the PAM assets with access to attest.
Specific PAM user accounts	Select the PAM user accounts with access to attest.
Specific PAM directory accounts	Select the PAM directory accounts with access to attest.
Specific PAM directories	Select PAM directories. Attests access to these PAM directories.
Specific access type	Select access types. Attests access that uses one of these access types.
PAM user accounts mapped to specific employees	Select the identities. Attests access through PAM user accounts with these identities assigned to them.
PAM user accounts with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests access through PAM user accounts with a risk index in the chosen range.
PAM user	Enter part of a name of PAM user accounts with access to attest. All PAM

Condition	Description
accounts with matching name	user accounts that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting departments

Department properties are attested using the **Department attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All departments	Attests all departments.
Specific departments	Select the departments to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Departments with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests departments with a risk index in the chosen range.
Departments with matching name	Enter part of a name of departments with access to attest. All departments that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation of departments by manager	Department managers can make approval decisions through attestation cases.

## Application role attestation

Application role properties are attested using the **Application role attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All application roles	Attests all application roles.
Specific application roles	Select the application roles to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Application roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests application roles with a risk index in the chosen range.
Application roles with matching name	Enter part of a name of application roles with access to attest. All application roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.

## Business role attestation

Business role properties are attested using the **Business role attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All business roles	Attests all business roles.
Specific business roles	Select the business roles to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Business roles with specific role classes	Select the role classes. Attests business roles with these role classes.
Business roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests business roles with a risk index in the chosen range.

Condition	Description
Business roles with matching name	Enter part of a name of business roles with access to attest. All business roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation of business roles by manager	Business role managers can make approval decisions through attestation cases.
Certification of business roles	Business role managers can make approval decisions through attestation cases.

## Attesting system roles

Cost center properties are attested using the **Cost center attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All cost centers	Attests all cost centers.
Specific cost centers	Select the cost centers to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Cost centers with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests cost centers with a risk index in the chosen range.
Cost centers with matching name	Enter part of a name of cost centers with access to attest. All cost centers that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation of cost centers by manager	Cost center managers can make approval decisions through attestation cases.

## Attesting locations

Location properties are attested using the **Location attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All locations	Attests all locations.
Specific locations	Select the locations to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Locations with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests locations with a risk index in the chosen range.
Locations with matching name	Enter part of a name of locations with access to attest. All locations that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation of locations by manager	Location managers can make approval decisions through attestation cases.

# Attesting system roles

System role properties are attested using the **System role attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All system roles	Attests all system roles.
Specific system roles	Select the system roles to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
System roles by applications	Select the applications (Application Governance). Attests system roles that are assigned to these applications.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system roles with a risk index in the chosen range.
System roles with matching name	Enter part of a name of system roles with access to attest. All system roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation of system roles by manager	System role managers can make approval decisions through attestation cases.

# Attesting memberships in system entitlements

User account memberships in system entitlements are attested using the **System entitlements membership attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:



Condition	Description
All system entitlements	Attests memberships in all system entitlements.
Specific employees	Select the identities. Attests this identity's memberships (or their associated user accounts) in system entitlements.
Specific employees with subidentities.	Select the identities. Attests this identity's memberships (or their associated user accounts) in system entitlements. In addition, it attests sub identities' memberships (or their associated user accounts) that the select identities are assigned to.
Specific system entitlements	Select the system entitlements. Attests memberships in these system entitlements.
Membership by attestation state	<p>Select an attestation status Attests memberships in system entitlements that match this attestation status.</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests memberships that have been denied.</li> <li>• <b>All Memberships:</b> Attests all memberships.</li> <li>• <b>New memberships:</b> Attests memberships that have never been attested.</li> </ul>
New or not attested for x days	Specify a number of days. Attests memberships in system entitlements that have not been attested for the defined number of days.
No dynamic groups from Active Roles	Attests memberships in all system entitlements. Dynamic groups are ignored in the process.
System entitlements with specific owners	Select the identities. Attests memberships in system entitlements that are managed by these identities.
System entitlements in a target system container	Select the target system containers. Attests memberships in system entitlements found in these target system containers.
System entitlements in target systems	Select the target systems. Attests memberships in system entitlements assigned to these target systems.
System entitlements with defined	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests memberships in system entitlements with a risk index in the chosen range.

Condition	Description
risk index	
System entitlements with owners in departments	Select the departments. Attests memberships in system entitlements that are managed by the identities in these departments.
System entitlements with any owner	Attests user account memberships in system entitlements that only have one owner.
System entitlements with matching name	Enter part of a name of system entitlements with user account memberships to attest. All system entitlements that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
System entitlements by applications	Select the applications. Attests user account memberships in system entitlements that are assigned to these applications.
System entitlements by assignment origin	<p>Select how user account memberships in system entitlements must be assigned to enable attestation:</p> <ul style="list-style-type: none"> <li>• <b>Directly assigned:</b> Attests memberships that were assigned directly.</li> <li>• <b>By request:</b> Attests memberships in system entitlements that were requested.</li> <li>• <b>By dynamic roles:</b> Attests memberships in system entitlements that were assigned through dynamic roles.</li> <li>• <b>Through roles:</b> Attests memberships in system entitlements that were assigned through roles.</li> <li>• <b>Through system roles:</b> Attests memberships in system entitlements that were assigned through system roles.</li> </ul>

For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation by selected approvers with automatic removal of assignments	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases. Memberships are deleted if attestation is denied



Approval policies	Description
	and the configuration fits.
Attestation by entitlement owner with automatic removal of assignments	Product owners of system entitlements can be approved through attestation cases. Memberships are deleted if attestation is denied and the configuration fits.
Attestation by employee manager and product owner (with peer group analysis)	<p>The following identities can be approved through attestation cases:</p> <ul style="list-style-type: none"> <li>• Identity managers who are assigned the system entitlements</li> <li>• Product owners of system entitlements after a peer group analysis (see <a href="#">Attestation by peer group analysis</a> on page 101)</li> </ul>
Attestation of group memberships by product owner with automatic removal of memberships	Product owners of system entitlements can be approved through attestation cases. Memberships are deleted if attestation is denied and the configuration fits.

## Attesting memberships in application roles

Memberships in application roles are attested using the **Application role membership attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All roles	Attests memberships in all applications roles.
Application roles with matching name	<p>Enter part of a name of application roles with primary memberships to attest. All application roles that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
Attesting by attestation status	<p>Select an attestation status Attests memberships in application roles that match this attestation status.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests memberships that have been denied.</li> <li>• <b>All Memberships:</b> Attests all memberships.</li> <li>• <b>New memberships:</b> Attests memberships that have never</li> </ul>

Condition	Description
	been attested.
Specific employees	Select the identities. Attests identity memberships in application roles.
Specific employees with subidentities.	Select the identities. Attests identity memberships in application roles. In addition, this identity's subidentities memberships in application roles are attested.
Specific roles	Select the application roles. Attests memberships in these application roles.  Use  and  to switch between hierarchical and list view. Multi-select is possible.
New or not attested for x days	Specify a number of days. Attests memberships in application roles that have not been attested for the defined number of days.
Roles by assignment type	Select how memberships in application roles must be assigned to enable attestation: <ul style="list-style-type: none"> <li>• <b>Directly assigned:</b> Attests memberships that were assigned directly.</li> <li>• <b>By request:</b> Attests memberships that were requested.</li> <li>• <b>By delegation:</b> Attests memberships that were delegated.</li> </ul>



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers with automatic removal of assignments	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases. Memberships are deleted if attestation is denied and the configuration fits.

## Attestation of memberships in business roles

Memberships in business roles are attested using the **Business role membership attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All roles	Attests memberships in all business roles.
Business roles with matching name	Enter part of a name of business roles with memberships to attest. All business roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
Attesting by attestation status	Select an attestation status Attests memberships in business roles that match this attestation status. You can select the follow status: <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests memberships that have been denied.</li> <li>• <b>All Memberships:</b> Attests all memberships.</li> <li>• <b>New memberships:</b> Attests memberships that have never been attested.</li> </ul>
Specific employees	Select the identities. Attests identity memberships in business roles.
Specific employees with subidentities.	Select the identities. Attests identity memberships in business roles. In addition, this identity's subidentities memberships in business roles are attested.
Specific roles	Select the business roles. Attests memberships in these business roles. Use  and  to switch between hierarchical and list view. Multi-select is possible.
New or not attested for x days	Specify a number of days. Attests memberships in business roles that have not been attested for the defined number of days.
Roles with specific owners	Select the identities. Attests memberships in business roles of identities who are owners of these business roles.
Roles with specific role classes	Select the role classes. Attests membership in business roles of this role class.
Roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests memberships in business roles with a risk index in the chosen range.
Roles with any owner	Attests all memberships in business roles that have an owner.
Roles with owners in departments	Select the departments. Attests all business roles that have an owner in the selected department.

Condition	Description
Roles by assignment type	<p>Select how memberships in business roles must be assigned to enable attestation:</p> <ul style="list-style-type: none"> <li>• <b>Directly assigned:</b> Attests memberships that were assigned directly.</li> <li>• <b>By request:</b> Attests memberships that were requested.</li> <li>• <b>By delegation:</b> Attests memberships that were delegated.</li> <li>• <b>By dynamic role:</b> Attests memberships that were attested through dynamic roles.</li> </ul>

For this attestation procedure, you can use the following attestation policies:



Approval policies	Description
Attestation by selected approvers with automatic removal of assignments	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases. Memberships are deleted if attestation is denied and the configuration fits.

## Attesting assignment of memberships in system roles

Memberships in system roles are attested using the **System role membership attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All roles	Attests memberships in all system roles.
System roles with matching name	<p>Enter part of a name of system roles with memberships to attest. All system roles that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
Attesting by attestation status	<p>Select an attestation status Attests memberships in system roles that match this attestation status.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests memberships that have been denied.</li> <li>• <b>All Memberships:</b> Attests all memberships.</li> </ul>

Condition	Description
	<ul style="list-style-type: none"> <li>• <b>New memberships:</b> Attests memberships that have never been attested.</li> </ul>
Specific roles	Select the system roles. Attests memberships in these system roles. Use  and  to switch between hierarchical and list view. Multi-select is possible.
New or not attested for x days	Specify a number of days. Attests memberships in system roles that have not been attested for the defined number of days.
Roles with specific owners	Select the identities. Attests memberships in system roles of identities who are owners of these system roles.
Roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests memberships in system roles with a risk index in the chosen range.
Roles with any owner	Attests all memberships in system roles that have an owner.
Roles with owners in departments	Select the departments. Attests all system roles that have an owner in the selected department.
System roles by applications	Select the applications (Application Governance). Attests memberships in system roles assigned to these applications.
Roles by assignment type	Select how memberships in system roles must be assigned to enable attestation: <ul style="list-style-type: none"> <li>• <b>Directly assigned:</b> Attests memberships that were assigned directly.</li> <li>• <b>By request:</b> Attests memberships that were requested.</li> <li>• <b>Inherited:</b> Attests inherited memberships.</li> </ul>

For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers with automatic removal of assignments	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases. Memberships are deleted if attestation is denied and the configuration fits.

# Attesting device owners

Owners of devices are attested by using the **Device ownership attestation** attestation procedure.

Condition	Description
All devices	Attests owners of all the devices.

# Attesting system entitlement owners

Owners of system entitlements are attested by using the **System entitlement ownership attestation** attestation procedure.

Condition	Description
All system entitlements	Attests owners of all system entitlements.
System entitlements by applications	Select the applications. Attests system entitlements owners to which the applications are assigned.

# Attesting system entitlement owners (initial)

Initial assignments of product owners to system entitlements are attested using the **System entitlement ownership attestation (initial)** attestation procedure (this means that the system entitlements did not have a product owner beforehand).

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All system entitlements without owner	Attests initial assignments of owners to system entitlements that do not have product owners.
No dynamic groups from Active Roles	Attests initial assignment of product owners to system entitlements. Dynamic groups are ignored in the process.

For this attestation procedure, you can use the following attestation policies:









Approval policies	Description
Attestation of ownership by proposed new owner	The proposed new product owners can make approval decisions about attestation cases.

## Attesting user accounts

User accounts are attested using the **User account attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All user accounts	Attests all user accounts.
All privileged user accounts	Attests all privileged user accounts.
User accounts in the target system	Select the target systems. Attests user accounts assigned to these target systems.
User accounts of specific employees	Select the identities. Attests user accounts assigned to these identities.
Specific user accounts	Select the user accounts to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
User accounts with defined risk index	Specify a risk index range. Attests user accounts with a risk index in the chosen range.
User accounts with matching name	Enter part of a name of user accounts with access to attest. All user accounts that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
User accounts with employees in departments	Select the departments. Attests user accounts with identities assigned to these departments. Use  and  to switch between hierarchical and list view. Multi-select is possible.
User accounts of employees in child departments	Select the departments. Attests user accounts with identities assigned to these or their child departments. Use  and  to switch between hierarchical and list view. Multi-select is possible.
User accounts of employees with matching names	Enter part of a name of the identities with user accounts to attest. All identities that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
New or not	Specify a number of days. Attests user accounts that have not been

Condition	Description
attested for x days	attested for the defined number of days.
All user accounts not assigned to an identity	Only attests user accounts not assigned to an identity (so-called orphaned user accounts).
Linked user accounts	Attests only user accounts that are assigned these identities.
Target system type	Select the target systems types. Attests user accounts in target system of this target system type.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation by selected approvers	Click <b>Assign/Change</b> in the <b>Attestors</b> field and then select the identities that can make approval decisions about attestation cases.
Attestation by target system manager	Target system managers can be approved through attestation cases.

## Attesting system entitlements

System entitlements are attested using the **System entitlement attestation** attestation procedure.

For this attestation procedure you can use the following attestation conditions:

Condition	Description
All system entitlements	Attests all system entitlements.
Specific system entitlements	Select the system entitlements to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
No dynamic groups from Active Roles	Attests all system entitlements. Dynamic groups are ignored in the process.
System entitlements with defined risk index	Specify a risk index range. Attests system entitlements with a risk index in the chosen range.

Condition	Description
System entitlements with matching name	Enter part of a name of system entitlements with access to attest. All system entitlements that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
System entitlements by applications	Select the applications. Attests system entitlements that are assigned to these applications.



For this attestation procedure, you can use the following attestation policies:

Approval policies	Description
Attestation of system entitlements by product owner (OA)	Product owners of system entitlements can be approved through attestation cases.
Attestation by target system manager	Target system managers can be approved through attestation cases.

## Attesting assignment of system entitlement to departments

System entitlements assignments to departments are attested using the **Attestation of system entitlement assignments to departments** attestation procedure.



Condition	Description
All departments	Attests assignments of system entitlements to all departments.
All system entitlements	Attests assignments of all system entitlements to departments.
Attesting by attestation status	Select an attestation status Attests assignments of system entitlements, matching this attestation status, to departments. You can select the follow status: <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific	Select the departments with system entitlements to attest.

Condition	Description
departments	Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific system entitlements	Select the with system entitlements with assignments to departments to attest.
Departments with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system entitlement assignments to departments with a risk index in the chosen range.
Departments with matching name	Enter part of a name of departments with system entitlement assignments to attest. All departments that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
New or not attested for x days	Specify a number of days. Attests system entitlement assignments to departments that have not been attested for the defined number of days.
System entitlements with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system entitlements, with a risk index in the chosen range, to departments.
System entitlements with matching name	Enter part of a name of system entitlements with assignments to departments to attest. All system entitlements that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting assignment of system entitlement to business roles



System entitlements assignments to business roles are attested using the **Attestation of system entitlement assignments to business roles** attestation procedure.

Condition	Description
All business roles	Attests assignments of system entitlements to all business roles.
All system entitlements	Attests assignments of all system entitlements to business roles.
Attesting by attestation	Select an attestation status Attests assignments of system entitlements, matching this attestation status, to business roles.

Condition	Description
status	<p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific business roles	<p>Select the business roles with system entitlements to attest.</p> <p>Use  and  to switch between hierarchical and list view. Multi-select is possible.</p>
Specific system entitlements	<p>Select the with system entitlements with assignments to business roles to attest.</p>
Business roles with specific role classes	<p>Select the role classes. Attests system entitlement assignments to business roles with these role classes.</p>
Business roles with defined risk index	<p>Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system entitlement assignments to business roles with a risk index in the chosen range.</p>
Business roles with matching name	<p>Enter part of a name of business roles with system entitlement assignments to attest. All business roles that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
New or not attested for x days	<p>Specify a number of days. Attests system entitlement assignments to business roles that have not been attested for the defined number of days.</p>
System entitlements with defined risk index	<p>Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system entitlements, with a risk index in the chosen range, to business roles.</p>
System entitlements with matching name	<p>Enter part of a name of system entitlement with assignments to business roles to attest. All system entitlements that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>

# Attestation of system entitlement assignments to cost centers



System entitlements assignments to cost centers are attested using the **Attestation of system entitlement assignments to cost centers** attestation procedure.

Condition	Description
All cost centers	Attests assignments of system entitlements to all cost centers.
All system entitlements	Attests assignments of all system entitlements to cost centers.
Attesting by attestation status	<p>Select an attestation status Attests assignments of system entitlements, matching this attestation status, to cost centers.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific cost centers	<p>Select the cost centers with system entitlements to attest.</p> <p>Use  and  to switch between hierarchical and list view. Multi-select is possible.</p>
Specific system entitlements	Select the with system entitlements with assignments to cost centers to attest.
Cost centers with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system entitlement assignments to cost centers with a risk index in the chosen range.
Cost centers with matching name	<p>Enter part of a name of cost centers with system entitlement assignments to attest. All cost centers that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
New or not attested for x days	Specify a number of days. Attests system entitlement assignments to cost centers that have not been attested for the defined number of days.
System entitlements with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system entitlements, with a risk index in the chosen range, to cost centers.

Condition	Description
System entitlements with matching name	<p>Enter part of a name of system entitlement with assignments to cost centers to attest. All system entitlements that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>

## Attestation of system entitlement assignments to locations



System entitlements assignments to locations are attested using the **Attestation of system entitlement assignments to locations** attestation procedure.

Condition	Description
All locations	Attests assignments of system entitlements to all locations.
All system entitlements	Attests assignments of all system entitlements to locations.
Attesting by attestation status	<p>Select an attestation status Attests assignments of system entitlements, matching this attestation status, to locations.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific locations	<p>Select the locations with system entitlements to attest.</p> <p>Use  and  to switch between hierarchical and list view. Multi-select is possible.</p>
Specific system entitlements	Select the with system entitlements with assignments to locations to attest.
Locations with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system entitlement assignments to locations with a risk index in the chosen range.
Locations with matching name	<p>Enter part of a name of locations with system entitlement assignments to attest. All locations that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>

Condition	Description
New or not attested for x days	Specify a number of days. Attests system entitlement assignments to locations that have not been attested for the defined number of days.
System entitlements with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system entitlements, with a risk index in the chosen range, to locations.
System entitlements with matching name	Enter part of a name of system entitlement with assignments to locations to attest. All system entitlements that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting assignment of system role assignment to departments

System role assignments to departments are attested with the "Attestation of system role assignments to departments" attestation procedure.

Condition	Description
All departments	Assignments of system roles to all departments
All system roles	Attests assignments of all system roles to departments.
Attesting by attestation status	Select an attestation status Attests assignments of system roles, matching this attestation status, to departments.  You can select the follow status: <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific departments	Select the departments with system roles to attest.  Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific	Select the with system roles with assignments to departments to attest.





Condition	Description
system roles	
Departments with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system role assignments to departments with a risk index in the chosen range.
Departments with matching name	Enter part of a name of departments with system role assignments to attest. All departments that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
New or not attested for x days	Specify a number of days. Attests system role assignments to departments that have not been attested for the defined number of days.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system roles, with a risk index in the chosen range, to departments.
System roles with matching name	Enter part of a name of system role with departments assignments to attest. All system roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Attesting assignment of system roles to business roles

System role assignments to business roles are attested with the "Attestation of system role assignments to business roles" attestation procedure.



Condition	Description
All business roles	Attests assignments of system roles to all business roles.
All system roles	Attests assignments of all system roles to business roles.
Attesting by attestation status	Select an attestation status Attests assignments of system roles, matching this attestation status, to business roles. You can select the follow status: <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>

Condition	Description
Specific business roles	Select the business roles with system roles to attest. Use  and  to switch between hierarchical and list view. Multi-select is possible.
Specific system roles	Select the with system roles with assignments to business roles to attest.
Business roles with specific role classes	Select the role classes. Attests system roles assignments to business roles with these role classes.
Business roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system role assignments to business roles with a risk index in the chosen range.
Business roles with matching name	Enter part of a name of business roles with system role assignments to attest. All business roles that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.
New or not attested for x days	Specify a number of days. Attests system role assignments to business roles that have not been attested for the defined number of days.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system roles, with a risk index in the chosen range, to business roles.
System roles with matching name	Enter part of a name of system role with business roles assignments to attest. All system roles that have this pattern in their name are included.  Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

## Cost center system role assignment attestation



System role assignments to cost centers are attested with the "Attestation of system role assignments to cost centers" attestation procedure.

Condition	Description
All cost centers	Attests assignments of system roles to all cost centers.
All system	Attests assignments of all system roles to cost centers.

Condition	Description
roles	
Attesting by attestation status	<p>Select an attestation status Attests assignments of system roles, matching this attestation status, to cost centers.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific cost centers	<p>Select the cost centers with system roles to attest.</p> <p>Use  and  to switch between hierarchical and list view. Multi-select is possible.</p>
Specific system roles	Select the with system roles with assignments to cost centers to attest.
Cost centers with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system role assignments to cost centers with a risk index in the chosen range.
Cost centers with matching name	<p>Enter part of a name of cost centers with system role assignments to attest. All cost centers that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
New or not attested for x days	Specify a number of days. Attests system role assignments to cost centers that have not been attested for the defined number of days.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system roles, with a risk index in the chosen range, to cost centers.
System roles with matching name	<p>Enter part of a name of system role with cost center assignments to attest. All system roles that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>

## Attesting assignment of system entitlements to locations

System role assignments to locations are attested with the "Attestation of system role assignments to locations" attestation procedure.

Condition	Description
All locations	Attests assignments of system roles to all locations.
All system roles	Attests assignments of all system roles to locations.
Attesting by attestation status	<p>Select an attestation status Attests assignments of system roles, matching this attestation status, to locations.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific locations	<p>Select the locations with system roles to attest.</p> <p>Use  and  to switch between hierarchical and list view. Multi-select is possible.</p>
Specific system roles	Select the with system roles with assignments to locations to attest.
Locations with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests system role assignments to locations with a risk index in the chosen range.
Locations with matching name	<p>Enter part of a name of locations with system role assignments to attest. All locations that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>
New or not attested for x days	Specify a number of days. Attests system role assignments to locations that have not been attested for the defined number of days.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments of system roles, with a risk index in the chosen range, to locations.
System roles with matching name	<p>Enter part of a name of system role with location assignments to attest. All system roles that have this pattern in their name are included.</p> <p>Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.</p>

## Attesting assignments to system roles

Assignments to system roles are attested using the **System role membership attestation** attestation procedure.

Condition	Description
All system roles	Attests assignments to all system roles.
Attesting by attestation status	<p>Select an attestation status Attests assignments to system roles, matching this attestation status.</p> <p>You can select the follow status:</p> <ul style="list-style-type: none"> <li>• <b>Denied memberships:</b> Attests assignments that have been denied.</li> <li>• <b>All Memberships:</b> Attests all assignments.</li> <li>• <b>New memberships:</b> Attests assignments that have never been attested.</li> </ul>
Specific system roles	Select the with system roles with assignments to attest.
New or not attested for x days	Specify a number of days. Attests assignments to system roles that have not been attested for the defined number of days.
System roles by applications	Select the applications. Attests assignments to system roles assigned to these applications.
System roles with defined risk index	Use the <b>Lower limit</b> and <b>Upper limit</b> fields to define a risk index range. Attests assignments to system roles with a risk index in the chosen range.
System roles with matching name	Enter part of a name of system role with assignments to attest. All system roles that have this pattern in their name are included. Example: <b>Per</b> finds "Person", "Personal", "Perfection" and so on.

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](http://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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