

Novell Identity Manager

3.5.1

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USER APPLICATION: USER GUIDE

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Contents

About This Guide	9
Part I Welcome to Identity Manager	11
1 Getting Started	13
1.1 Identity Manager and You	13
1.1.1 Introducing the Identity Manager User Application	13
1.1.2 The Big Picture	15
1.1.3 Typical Uses	15
1.2 Accessing the Identity Manager User Application	16
1.2.1 Your User Application Might Look Different	17
1.3 Logging In	17
1.3.1 If You Forget Your Password	18
1.3.2 If You Have Trouble Logging In	19
1.3.3 If You're Prompted for Additional Information	19
1.4 Exploring the User Application	19
1.4.1 Getting Help	20
1.4.2 Preferred Locale	21
1.4.3 Logging Out	21
1.5 What's Next	21
Part II Using the Identity Self-Service Tab	23
2 Introducing the Identity Self-Service Tab	25
2.1 About the Identity Self-Service Tab	25
2.2 Accessing the Identity Self-Service Tab	25
2.3 Exploring the Tab's Features	26
2.4 Identity Self-Service Actions You Can Perform	27
3 Using the Organization Chart	31
3.1 About the Organization Chart	31
3.2 Navigating the Chart	34
3.2.1 Navigating to the Next Higher Level	34
3.2.2 Resetting the Root of the Relationship	35
3.2.3 Switching the Default Relationship	35
3.2.4 Expanding or Collapsing the Default Chart	36
3.2.5 Choosing a Relationship to Expand or Collapse	37
3.2.6 Looking Up a User in Organization Chart	39
3.3 Displaying Detailed Information	40
3.4 Sending E-Mail from a Relationship Chart	41
3.4.1 E-Mailing Information About a User in a Chart	41
3.4.2 Sending New E-Mail to a User in the Chart	42
3.4.3 Sending E-Mail to a Manager's Team	43

4	Using the Associations Report	45
4.1	About the Associations Report	45
4.2	Displaying Associations	46
5	Using My Profile	49
5.1	About My Profile	49
5.2	Editing Your Information	50
	5.2.1 Hiding Information	51
	5.2.2 Using the Editing Buttons	51
5.3	E-Mailing Your Information	55
5.4	Displaying Your Organization Chart	56
5.5	Linking to Other Users or Groups	57
5.6	Choosing a Preferred Language	61
	5.6.1 Defining a Preferred Language in the Browser	62
6	Using Directory Search	63
6.1	About Directory Search	63
6.2	Performing Basic Searches	66
6.3	Performing Advanced Searches	66
	6.3.1 Selecting an Expression	69
	6.3.2 Specifying a Value for Your Comparison	70
6.4	Working with Search Results	75
	6.4.1 About Search Results	75
	6.4.2 Using the Search List	77
	6.4.3 Other Actions You Can Perform	78
6.5	Using Saved Searches	81
	6.5.1 To List Saved Searches	81
	6.5.2 To Run a Saved Search	81
	6.5.3 To Edit a Saved Search	81
	6.5.4 To Delete a Saved Search	82
7	Performing Password Management	83
7.1	About Password Management	83
7.2	Password Challenge Response	84
7.3	Password Hint Change	85
7.4	Change Password	86
7.5	Password Policy Status	88
7.6	Password Sync Status	89
8	Creating Users or Groups	91
8.1	About Creating Users or Groups	91
8.2	Creating a User	91
8.3	Creating a Group	94
8.4	Using the Editing Buttons	95
	8.4.1 To Look Up a Container	95
	8.4.2 To Look Up a User	97
	8.4.3 To Use the History List	98

Part III Using the Requests & Approvals Tab 101

9 Introducing the Requests & Approvals Tab 103

- 9.1 About the Requests & Approvals Tab 103
- 9.2 Accessing the Requests & Approvals Tab 104
- 9.3 Exploring the Tab's Features 104
- 9.4 Requests & Approvals Actions You Can Perform 106
- 9.5 Understanding the Requests & Approvals Legend 108

10 Managing Your Work 113

- 10.1 About the My Work Actions 113
- 10.2 Managing Your Tasks 113
 - 10.2.1 Viewing Your Tasks 114
 - 10.2.2 Selecting a Task 115
 - 10.2.3 Claiming a Task 119
- 10.3 Requesting a Resource 122
- 10.4 Checking the Status of Your Requests 129

11 Configuring Your Provisioning Settings 133

- 11.1 About the My Settings Actions 133
 - 11.1.1 About Proxies and Delegates 133
 - 11.1.2 Sample Usage Scenarios 133
- 11.2 Acting As a Proxy 134
- 11.3 Specifying Your Availability 136
 - 11.3.1 Setting Your Availability Status 136
 - 11.3.2 Creating or Editing an Availability Setting 138
 - 11.3.3 Deleting an Availability Setting 141
- 11.4 Viewing and Editing Your Proxy Assignments 142
 - 11.4.1 Displaying Your Proxy Settings 142
 - 11.4.2 Creating or Editing Proxy Assignments 143
 - 11.4.3 Deleting Proxy Assignments 144
- 11.5 Viewing and Editing Your Delegate Assignments 145
 - 11.5.1 Displaying Your Delegate Settings 145
 - 11.5.2 Creating or Editing Delegate Assignments 146
 - 11.5.3 Deleting a Delegate Assignment 149

12 Managing Your Team's Work 151

- 12.1 About My Team's Work Actions 151
 - 12.1.1 About Teams 151
 - 12.1.2 About Team Request Rights 152
- 12.2 Managing Your Team's Tasks 152
 - 12.2.1 Viewing Tasks by Team Member 153
 - 12.2.2 Viewing Tasks by User or Group 154
 - 12.2.3 Using the Task Displays 156
 - 12.2.4 Selecting a Task 160
 - 12.2.5 Claiming a Task 165
 - 12.2.6 Reassigning a Task 169
 - 12.2.7 Releasing a Task 170
- 12.3 Make Team Requests 170
- 12.4 Managing Your Team's Requests 176

13 Configuring Your Team's Provisioning Settings	181
13.1 About the My Team's Settings Actions	181
13.2 Viewing and Editing Your Team's Proxy Assignments	181
13.3 Viewing and Editing Your Team's Delegate Assignments	185
13.4 Specifying Your Team's Availability	190

About This Guide

This book describes the user interface of the Novell® Identity Manager user application and how you can use the features it offers, including:

- ◆ Identity self-service (for user information, passwords, and directories)
- ◆ Requests and approvals (using workflow-based provisioning) if you have the Provisioning Module for Identity Manager

Audience

The information in this book is for end users of the Identity Manager user interface.

Prerequisites

This guide assumes that you are using the default configuration of the Identity Manager user interface. However, it's possible that your version of the user interface has been customized to look or operate differently.

Before you get started, you should check with your system administrator for details on any customizations you might encounter.

Organization

Here's a summary of what you'll find in this book:

Part	Description
Part I, "Welcome to Identity Manager," on page 11	Introduction to the Identity Manager user interface and how to begin using it
Part II, "Using the Identity Self-Service Tab," on page 23	How to use the <i>Identity Self-Service</i> tab of the Identity Manager user interface to display and work with identity information, including: <ul style="list-style-type: none">◆ Organization charts◆ Profiles (your identity details)◆ Directory searches◆ Passwords◆ User accounts (and more)

Part	Description
Part III, "Using the Requests & Approvals Tab," on page 101	<p>How to use the <i>Requests & Approvals</i> tab of the Identity Manager user interface to:</p> <ul style="list-style-type: none"> ◆ Manage provisioning work (tasks and resource requests) for yourself or your team ◆ Configure provisioning settings for yourself or your team
<p>NOTE: This part applies only if you have the Provisioning Module for Identity Manager.</p>	

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We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to www.novell.com/documentation/feedback.html and enter your comments there.

Documentation Updates

For the most recent version of the *IDM User Application: User Guide*, visit the [Identity Manager Web site \(http://www.novell.com/documentation/idm35/\)](http://www.novell.com/documentation/idm35/).

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In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux* or UNIX*, should use forward slashes as required by your software.

Welcome to Identity Manager



Read this part first to learn about the Identity Manager User Application and how to begin using it.

- ◆ [Chapter 1, “Getting Started,” on page 13](#)

Getting Started

1

This section tells you how to begin using the Identity Manager User Application. Topics include:

- ◆ [Section 1.1, “Identity Manager and You,” on page 13](#)
- ◆ [Section 1.2, “Accessing the Identity Manager User Application,” on page 16](#)
- ◆ [Section 1.3, “Logging In,” on page 17](#)
- ◆ [Section 1.4, “Exploring the User Application,” on page 19](#)
- ◆ [Section 1.5, “What’s Next,” on page 21](#)

1.1 Identity Manager and You

Novell® Identity Manager is a system software product that your organization uses to securely manage the access needs of its user community. If you’re a member of that user community, you benefit from Identity Manager in a number of ways. For example, Identity Manager enables your organization to:

- ◆ Give users access to the information (such as group org charts, department white pages, or employee lookup) and resources (such as equipment or accounts on internal systems) that they need, right from day one
- ◆ Synchronize multiple passwords into a single login for all your systems
- ◆ Modify or revoke access rights instantly when necessary (such as when someone transfers to a different group or leaves the organization)
- ◆ Support compliance with government regulations

To bring these benefits directly to you and your team, the Identity Manager User Application provides a user interface that you can use from your Web browser.

1.1.1 Introducing the Identity Manager User Application

The Identity Manager User Application is your view into the information, resources, and capabilities of Identity Manager. Your system administrator determines the details of what you can see and do in the Identity Manager User Application. Typically, this includes:

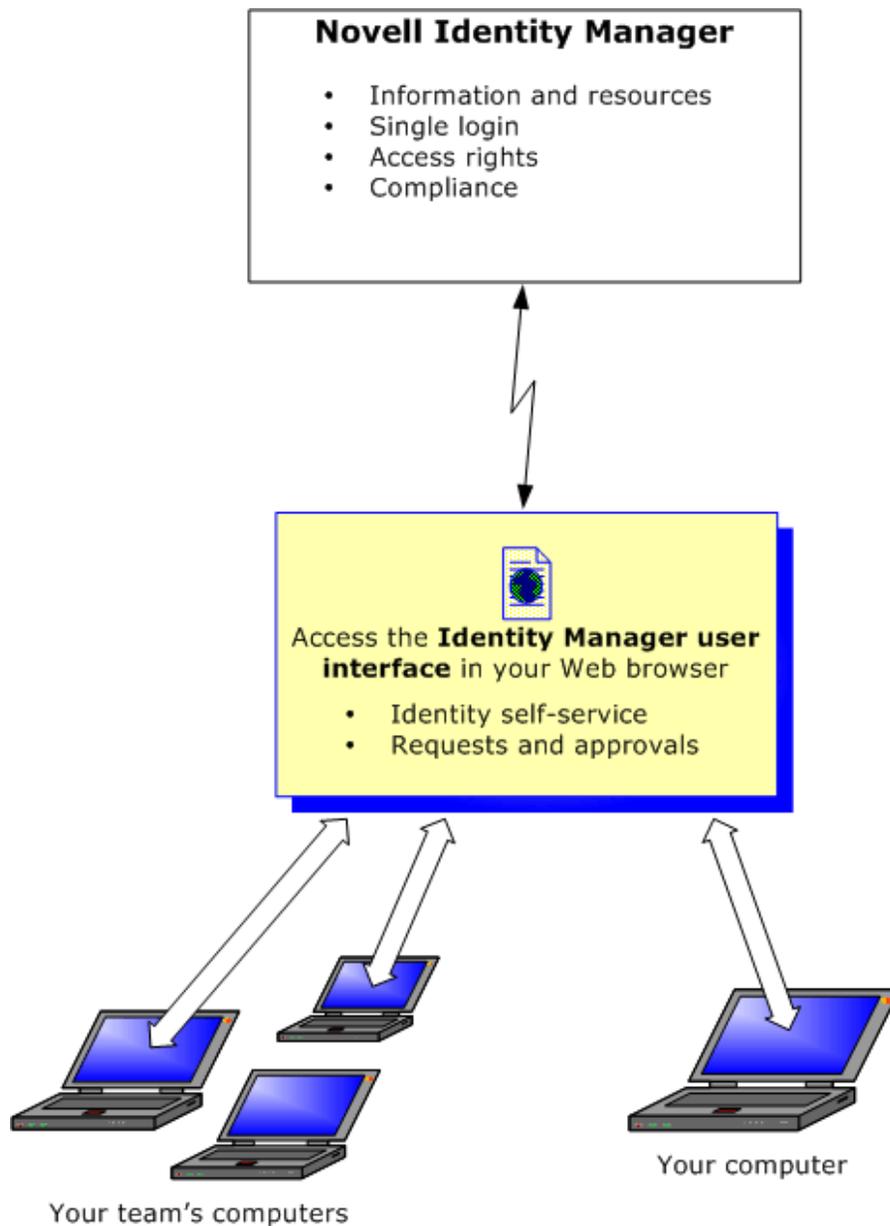
- ◆ Identity self-service, which enables you to:
 - ◆ Display organization charts
 - ◆ Report applications associated with a user if you are an administrator. (Requires the Provisioning Module for Identity Manager.)
 - ◆ Edit the information in your profile
 - ◆ Search a directory
 - ◆ Change your password, password challenge response, and password hint
 - ◆ Review your password policy status and password synchronization status
 - ◆ Create accounts for new users or groups (if you are authorized)

- ◆ Requests and approvals, which enable you to:
 - ◆ Issue requests for resources
 - ◆ Check the approval of your resource requests
 - ◆ Work on tasks assigned to you for approving other resource requests
 - ◆ Perform requests and approvals as a proxy or delegate for someone else
 - ◆ Assign someone else to be your proxy or delegate (if you are authorized)
 - ◆ Manage all of these request and approval features for your team (if you are authorized)
 - ◆ Optionally provide a digital signature for each request or approval

NOTE: Requests and approvals require the Provisioning Module for Identity Manager.

1.1.2 The Big Picture

Figure 1-1 The IDM User Application Provides the User Interface to Identity Manager



1.1.3 Typical Uses

Here are some examples of how people typically use the Identity Manager User Application within an organization.

Working with Identity Self-Service

- ◆ Ella (an end user) recovers her forgotten password through the identity self-service features when logging in.

- ♦ Erik (an end user) performs a search for all employees who speak German at his location.
- ♦ Eduardo (an end user) browses the organization chart, finds Ella, and clicks the e-mail icon to send a message to her.

Working with Requests and Approvals

- ♦ Ernie (an end user) browses a list of resources available to him, and requests access to the Siebel* system.
- ♦ Amy (an approver) receives notification of an approval request via e-mail (which contains an URL). She clicks the link, is presented with an approval form, and approves it.
- ♦ Ernie checks on the status of his previous request for Siebel access (which has now gone to a second person for approval). He sees that it is still in progress.
- ♦ Amy is going on vacation, so she indicates that she is temporarily unavailable. No new approval tasks are assigned to her while she is unavailable.
- ♦ Amy opens her approval task list, sees that there are too many for her to respond to in a timely manner, and reassigns several to co-workers.
- ♦ Pat (an administrative assistant, acting as a proxy user for Amy) opens Amy's task list and performs an approval task for her.
- ♦ Max (a manager) views the task lists of people in his department. He knows that Amy is on vacation, so he reassigns tasks to others in his department.
- ♦ Max initiates a request for a database account for someone in his department who reports directly to him.
- ♦ Max assigns Dan to be an authorized delegate for Amy.
- ♦ Dan (now a delegated approver) receives Amy's tasks when she is unavailable.
- ♦ Max engages an unpaid intern, who should not be entered into the HR system. The system administrator creates the user record for this intern and requests that he be given access to Notes, Active Directory*, and Oracle*.

1.2 Accessing the Identity Manager User Application

When you're ready to start using the Identity Manager User Application, all you need on your computer is a Web browser. Identity Manager supports the most popular browser versions; see your system administrator for a list of supported browsers or for help installing one.

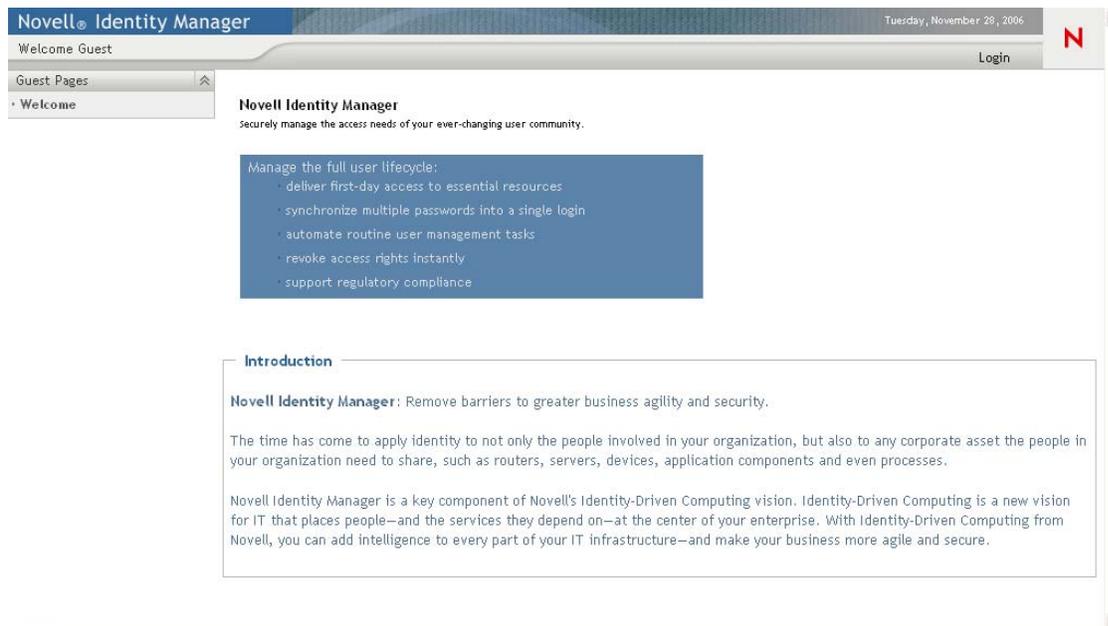
Because it works in a browser, the Identity Manager User Application is as easy to access as any Web page.

NOTE: To use the Identity Manager User Application, enable cookies (at least *Medium* privacy level in Internet Explorer) and JavaScript* in your Web browser.

To access the Identity Manager User Application, open a Web browser and go to the address (URL) for the Identity Manager User Application (as supplied by your system administrator), for example <http://myappserver:8080/IDM>.

By default, this takes you to the Welcome Guest page of the User Application:

Figure 1-2 The Welcome Guest Page of the User Application



From here, you can log in to the User Application to get access to its features.

1.2.1 Your User Application Might Look Different

If you see a different first page when accessing the Identity Manager User Application, it's typically because the application has been customized for your organization. As you work, you might find that other features of the User Application have also been customized.

If this is the case, you should check with your system administrator to learn how your customized User Application differs from the default configuration described in this guide.

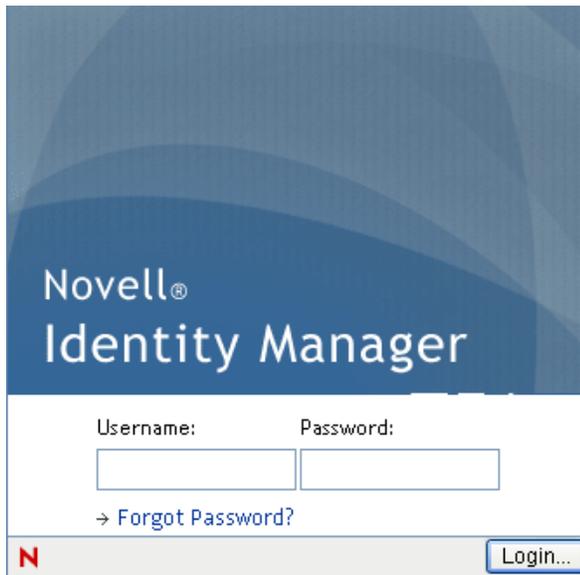
1.3 Logging In

You must be an authorized user to log in to the Identity Manager User Application from the guest welcome page. If you need help getting a username and password to supply for the login, see your system administrator.

To log in to the Identity Manager User Application:

- 1 From the Welcome Guest page, click the *Login* link (in the top right corner of the page).

The User Application prompts you for a username and password:

The image shows the Novell Identity Manager login interface. It features a blue header with the text "Novell® Identity Manager". Below the header, there are two input fields labeled "Username:" and "Password:". A blue link labeled "→ Forgot Password?" is positioned below the password field. At the bottom left, there is a red "N" logo, and at the bottom right, there is a "Login..." button.

- 2 Type your username and password, then click *Login*.

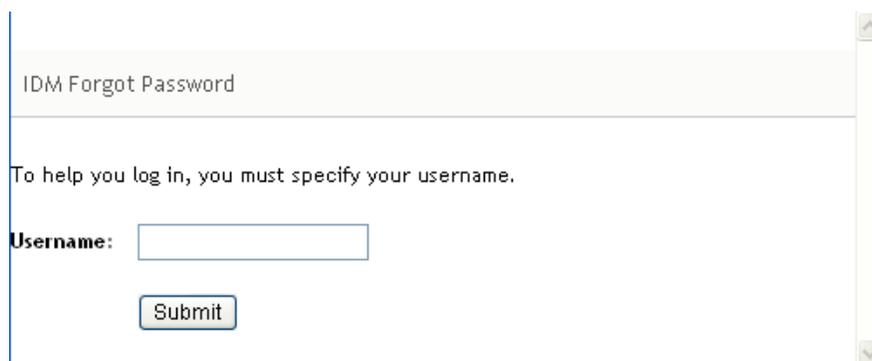
1.3.1 If You Forget Your Password

If you can't remember the password to type, you might be able to use the *Forgot Password?* link for assistance. When you are prompted to log in, this link appears on the page by default. You can take advantage of it if your system administrator has set up an appropriate password policy for you.

To use the Forgot Password feature:

- 1 When you're prompted to log in, click the *Forgot Password?* link.

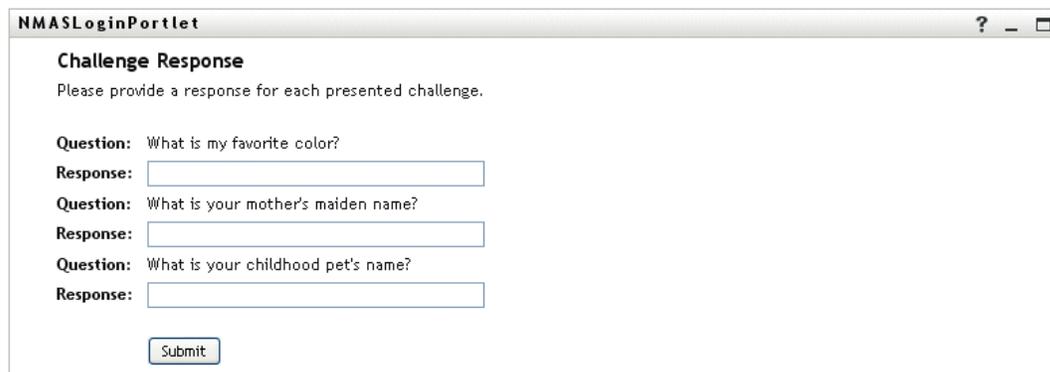
You are then asked for your username:

The image shows the "IDM Forgot Password" form. The title "IDM Forgot Password" is at the top. Below the title, the text "To help you log in, you must specify your username." is displayed. There is a "Username:" label followed by an input field. Below the input field is a "Submit" button.

- 2 Type your username and click *Submit*.

If Identity Manager responds that it can't find a password policy for you, see your system administrator for assistance.

3 Answer any challenge questions that display and click *Submit*. For example:



The screenshot shows a web browser window titled "NMASLoginPortlet". Inside the window, there is a section titled "Challenge Response" with the instruction "Please provide a response for each presented challenge." Below this, there are three sets of challenge questions and response fields:

- Question: What is my favorite color?
Response:
- Question: What is your mother's maiden name?
Response:
- Question: What is your childhood pet's name?
Response:

At the bottom of the form is a "Submit" button.

Answer the challenge questions to get assistance with your password. Depending on how the system administrator has set up your password policy, you could:

- ♦ See a hint about your password displayed on the page
- ♦ Receive an e-mail containing your password or a hint about it
- ♦ Be prompted to reset your password

1.3.2 If You Have Trouble Logging In

If you are unable to log in to the Identity Manager User Application, make sure that you're using the right username and typing the password correctly (spelling, uppercase or lowercase letters, etc.). If you still have trouble, consult your system administrator. It's helpful if you can provide details about the problem you are having (such as error messages).

1.3.3 If You're Prompted for Additional Information

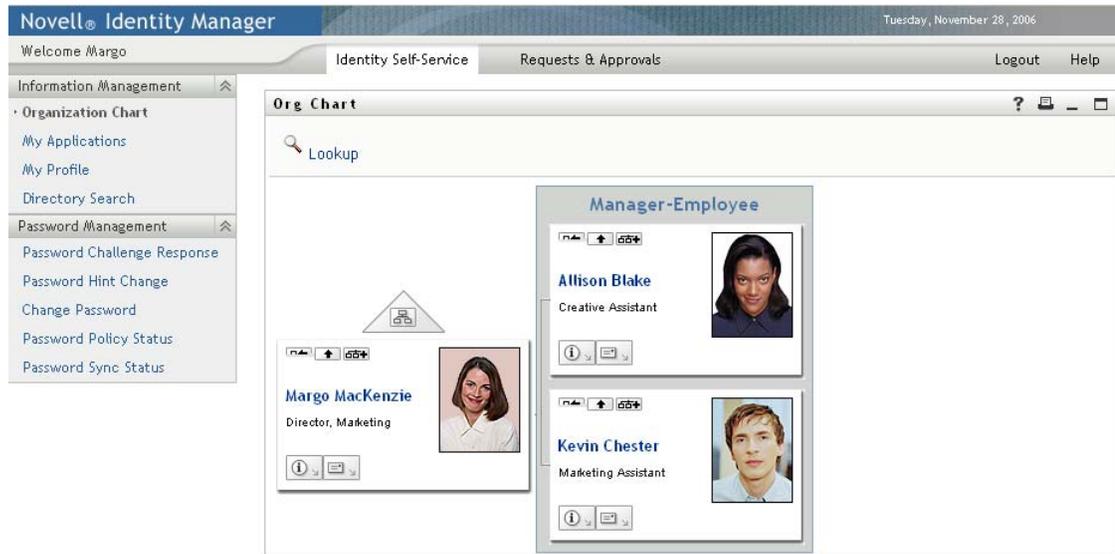
You might be prompted for other kinds of information as soon as you log in to the Identity Manager User Application. It all depends on how the system administrator has set up your password policy (if any). For example:

- ♦ If this is your first login, you might be prompted to define your challenge questions and responses, or your password hint
- ♦ If your password has expired, you might be prompted to reset it

1.4 Exploring the User Application

After you log in, the Identity Manager User Application displays the tab pages where you do your work:

Figure 1-3 On Login, You See Tabs and the Organization Chart



If you look along the top of the User Application, you'll see the two main tabs:

- ◆ *Identity Self-Service* (which is open by default)
To learn about this tab and how to work with it, see [Part II, "Using the Identity Self-Service Tab," on page 23](#).
- ◆ *Requests & Approvals*
To learn about this tab and how to work with it, see [Part III, "Using the Requests & Approvals Tab," on page 101](#).

NOTE: To enable the *Requests & Approvals* tab, your organization must have the Provisioning Module for Identity Manager.

To switch to a different tab, simply click the tab you want to use.

1.4.1 Getting Help

While working in the Identity Manager User Application, you can display online help to get documentation about the tab that you're currently using.

- 1 Go to the tab that you want to learn about (such as *Identity Self-Service* or *Requests & Approvals*).
- 2 Click the *Help* link (in the top right corner of the page).

The help page for the current tab displays.

1.4.2 Preferred Locale

If your administrator has not defined a preferred locale (language) for the User Application, you receive a prompt to select your own preferred locale when you first log in.

- 1 When prompted, add a locale by opening the *Available Locales* list, selecting a locale, and clicking *Add*.

For more information, see [Section 5.6, “Choosing a Preferred Language,” on page 61](#).

Edit Preferred Locale

User: Chip Nano
Set Locale Preferences for the user in the current Application.

Locales in order of preference

Move Up
Move Down
Remove

Available Locales
Select a locale to add... Add

Save Changes

1.4.3 Logging Out

When you're finished working in the Identity Manager User Application and want to end your session, you can log out.

- 1 Click the *Logout* link (in the top right corner of the page).

By default, the User Application thanks you for using Novell Identity Manager. Click the red link titled *Return to Novell Identity Manager Login* to return to a login prompt.

1.5 What's Next

Now that you've learned the basics of the Identity Manager User Application, you can start using the tabs it provides to get your work done.

To learn about	See
Doing identity self-service work	Part II, “Using the Identity Self-Service Tab,” on page 23
Doing request and approval work	Part III, “Using the Requests & Approvals Tab,” on page 101

Using the Identity Self-Service Tab



These sections tell you how to use the *Identity Self-Service* tab of the Identity Manager User Application to display and work with identity information.

- ◆ [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#)
- ◆ [Chapter 3, “Using the Organization Chart,” on page 31](#)
- ◆ [Chapter 4, “Using the Associations Report,” on page 45](#)
- ◆ [Chapter 5, “Using My Profile,” on page 49](#)
- ◆ [Chapter 6, “Using Directory Search,” on page 63](#)
- ◆ [Chapter 7, “Performing Password Management,” on page 83](#)
- ◆ [Chapter 8, “Creating Users or Groups,” on page 91](#)

Introducing the Identity Self-Service Tab

2

This section tells you how to begin using the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 2.1, “About the Identity Self-Service Tab,” on page 25](#)
- ◆ [Section 2.2, “Accessing the Identity Self-Service Tab,” on page 25](#)
- ◆ [Section 2.3, “Exploring the Tab’s Features,” on page 26](#)
- ◆ [Section 2.4, “Identity Self-Service Actions You Can Perform,” on page 27](#)

For more general information about accessing and working with the Identity Manager User Application, see [Chapter 1, “Getting Started,” on page 13](#).

2.1 About the Identity Self-Service Tab

The *Identity Self-Service* tab gives you a convenient way to display and work with identity information yourself. It enables your organization to be more responsive by giving you access to the information you need whenever you need it. For example, you might use the *Identity Self-Service* tab to:

- ◆ Manage your own user account directly
- ◆ Look up other users and groups in the organization on demand
- ◆ Visualize how those users and groups are related
- ◆ List applications with which you are associated

Your system administrator is responsible for setting up the contents of the *Identity Self-Service* tab for you and the others in your organization. What you can see and do is typically determined by your job requirements and your level of authority.

2.2 Accessing the Identity Self-Service Tab

By default, after you have logged in to the Identity Manager User Application, the *Identity Self-Service* tab opens and displays its Organization Chart page:

Figure 2-1 The Organization Chart Page on the Identity Self-Service Tab



If you go to another tab in the Identity Manager User Application but then want to return, just click the *Identity Self-Service* tab to open it again.

2.3 Exploring the Tab's Features

This section describes the default features of the *Identity Self-Service* tab. (Your tab might look different because of customizations made for your organization; consult your system administrator.)

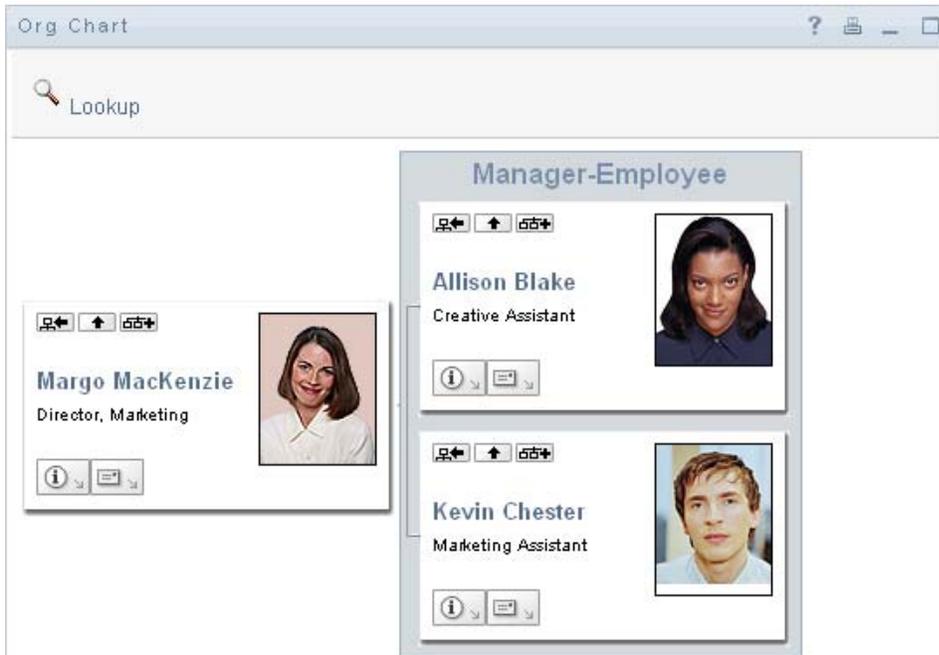
The left side of the *Identity Self-Service* tab displays a menu of actions you can perform. The actions are listed by category — *Information Management*, *Password Management*, and *Directory Management* (if authorized):

Figure 2-2 The Identity Self-Service Menu of Actions



When you click an action, it displays a corresponding page on the right. The page typically contains a special window called a *portlet*, which shows the details for that action. For example, the portlet on the Organization Chart page looks like this:

Figure 2-3 The Portlet on the Organization Chart Page



The portlet title bar typically displays a set of buttons you can click to perform standard operations. For example:



Table 2-1 describes what these buttons do:

Table 2-1 Portlet Title-Bar Buttons and Their Functions

Button	What It Does
	Displays help for the portlet
	Prints the contents of the portlet
	Minimizes the portlet
	Maximizes the portlet

If you see other buttons and aren't sure what they do, hover your mouse pointer over them to display descriptions.

2.4 Identity Self-Service Actions You Can Perform

Table 2-2 summarizes the actions that are available to you by default on the *Identity Self-Service* tab:

Table 2-2 *Actions Available Through the Identity Self-Service Tab*

Category	Action	Description
Information Management	Organization Chart	<p>Displays the relationships among users and groups in the form of an interactive organizational chart.</p> <p>For details, see Chapter 3, “Using the Organization Chart,” on page 31.</p>
	Associations Report	<p>Available to administrators. Displays applications with which a user is associated.</p> <p>For details, see Chapter 4, “Using the Associations Report,” on page 45.</p>
	My Profile	<p>Displays the details for your user account and lets you work with that information.</p> <p>For details, see Chapter 5, “Using My Profile,” on page 49.</p>
	Directory Search	<p>Lets you search for users or groups by entering search criteria or by using previously saved search criteria.</p> <p>For details, see Chapter 6, “Using Directory Search,” on page 63.</p>

Category	Action	Description
Password Management	Password Challenge Response	Lets you set or change your valid responses to administrator-defined challenge questions, and set or change user-defined challenge questions and responses. For details, see Chapter 7, “Performing Password Management,” on page 83.
	Password Hint Definition	Lets you set or change your password hint. For details, see Chapter 7, “Performing Password Management,” on page 83.
	Change Password	Lets you change (reset) your password, according to the rules established by your system administrator. For details, see Chapter 7, “Performing Password Management,” on page 83.
	Password Policy Status	Displays information about the effectiveness of your password management. For details, see Chapter 7, “Performing Password Management,” on page 83.
	Password Sync Status	Displays the status of password synchronization for your associated applications that synchronize with the Identity Vault. For details, see Chapter 7, “Performing Password Management,” on page 83.
Directory Management	Create User or Group	Available to administrators and authorized users. Lets you create a new user or group. For details, see Chapter 8, “Creating Users or Groups,” on page 91.

Using the Organization Chart

3

This section tells you how to use the Organization Chart page on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 3.1, “About the Organization Chart,” on page 31](#)
- ◆ [Section 3.2, “Navigating the Chart,” on page 34](#)
- ◆ [Section 3.3, “Displaying Detailed Information,” on page 40](#)
- ◆ [Section 3.4, “Sending E-Mail from a Relationship Chart,” on page 41](#)

NOTE: This section describes the default features of the Organization Chart page. You might encounter some differences because of your job role, your level of authority, and customizations made for your organization; consult your system administrator for details.

For more general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

3.1 About the Organization Chart

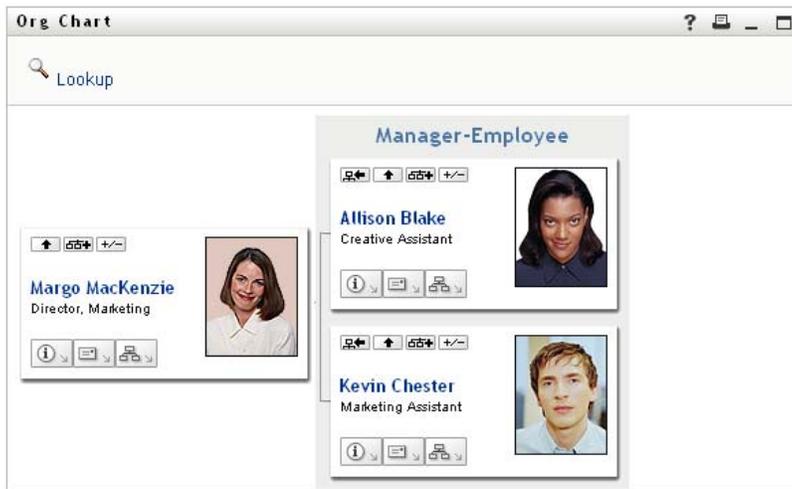
The Organization Chart page displays relationships. It can display relationships among managers, employees, and user groups in your business, and it can display other types of relationships that your administrator defines. The display is in the form of an organizational chart. In the chart, each person, group, or other entity is represented in a format that resembles a business card. The business card that is the starting point or orientation point of the organization chart is the *root* card.

The organization chart is interactive. You can:

- ◆ Select and display a type of relationship.
- ◆ Set your preferred default type of relationship, such as manager-employee, user group, or another that your administrator supplies.
- ◆ Set the default placement of a relationship chart to the left or right of the root card.
- ◆ Add up to two levels above the root card to the chart display.
- ◆ Make another user the root of the chart.
- ◆ Close (contract) or open (expand) a chart below a card.
- ◆ Look up a user to display in the chart.
- ◆ Display details (Profile page) for a selected user.
- ◆ Send user details (in the form of a link) to someone by e-mail.
- ◆ Send new e-mail to a selected user or to a manager’s team.

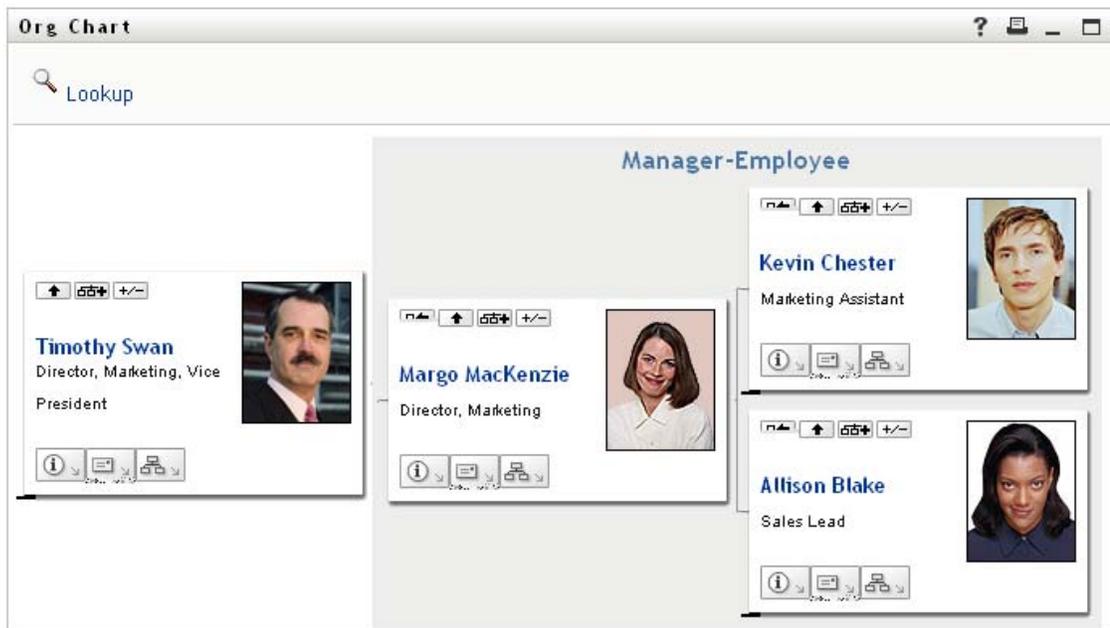
The following example introduces you to using Organization Chart. When you first display the Organization Chart page, it shows your own manager-employee relationships. For example, Margo MacKenzie (Marketing Director) logs in and sees the following default display of the Organization Chart page:

Figure 3-1 Default View at Login



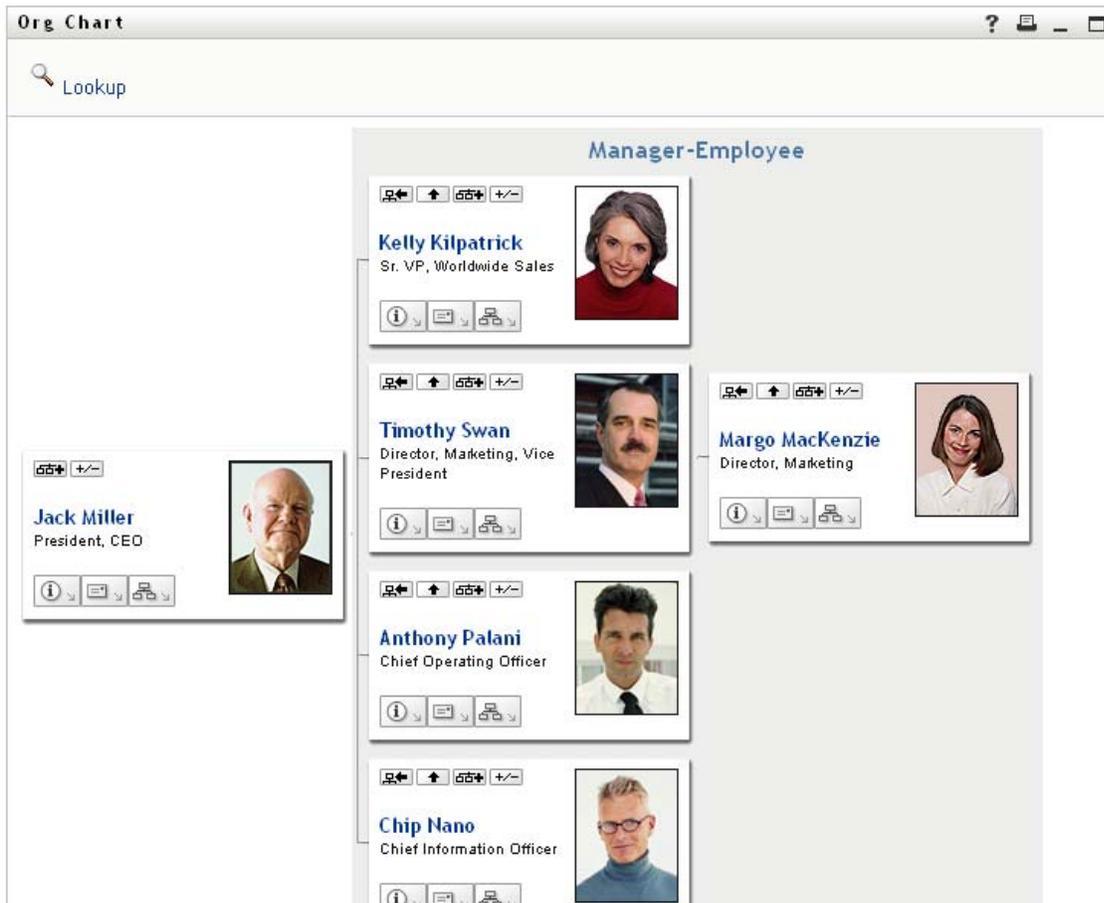
In her business card, Margo MacKenzie clicks *Go Up a Level*  to expand the chart to display her manager:

Figure 3-2 Margo Clicks “Go Up a Level” to Show Her Manager



Margo then clicks *Go Up a Level*  in her manager’s card, to show her manager’s manager:

Figure 3-3 Margo Clicks “Go Up a Level” A Second Time to Show Her Manager’s Manager



Margo then clicks *Make This Entity the New Root* in her own card. This makes her card the root of the display again:

Figure 3-4 Margo Clicks “Make This Entity the New Root” in Her Card



3.2 Navigating the Chart

This section describes how to move around a relationship chart by:

- ◆ Section 3.2.1, “Navigating to the Next Higher Level,” on page 34
- ◆ Section 3.2.2, “Resetting the Root of the Relationship,” on page 35
- ◆ Section 3.2.3, “Switching the Default Relationship,” on page 35
- ◆ Section 3.2.4, “Expanding or Collapsing the Default Chart,” on page 36
- ◆ Section 3.2.5, “Choosing a Relationship to Expand or Collapse,” on page 37
- ◆ Section 3.2.6, “Looking Up a User in Organization Chart,” on page 39

3.2.1 Navigating to the Next Higher Level

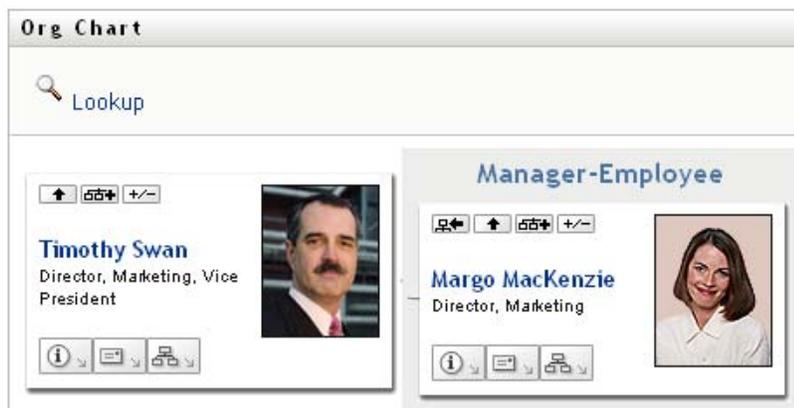
To navigate and expand to the next higher level in the relationship tree:

- 1 Click *Go Up a Level*  in the current top-level card.

For example, suppose that Margo clicks *Go Up a Level* in this view:



Her view expands to include the level above her:



Go Up a Level is available only if the user in the card is assigned a manager. If this function is not available to you, check with your administrator.

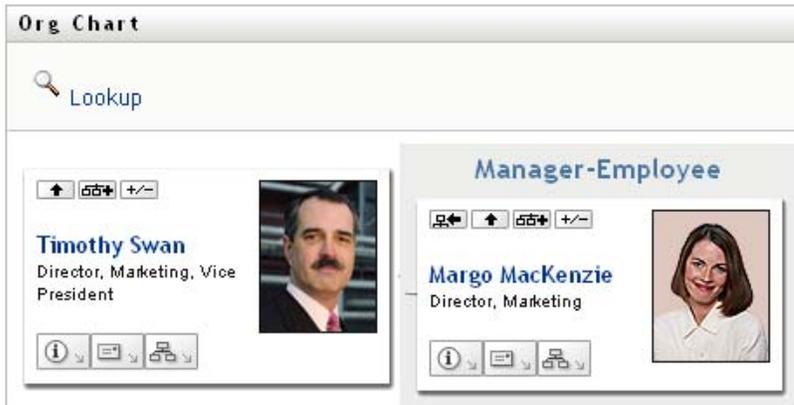
You can go up a level twice for a card.

3.2.2 Resetting the Root of the Relationship

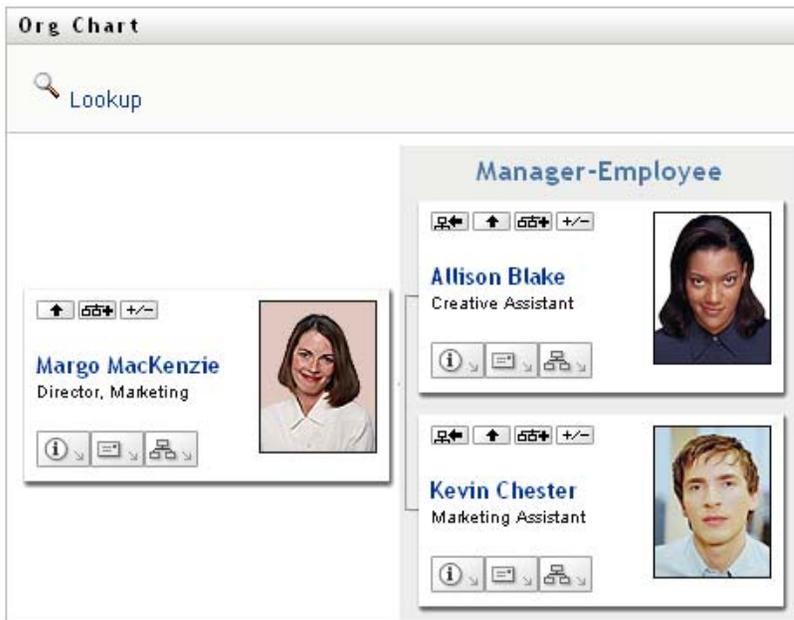
To reset the root of your view of the relationship chart:

- 1 Find the card of the user whom you want to the new root.
- 2 Click *Make This Entity the New Root* , or click the user's name (the name is a link) on that card. The chosen card becomes the root of the organization chart.

For example, suppose Margo Mackenzie clicks *Make This Entity the New Root* in her own card in this view:



Her card becomes the new root and is now at the top of her organization chart:



3.2.3 Switching the Default Relationship

- 1 Click *Switch to An Org Chart*  to change your default relationship.
- 2 Select the type of relationship to display. Your administrator can use relationships supplied by Novell (see [Table 3-1](#)) and can also define customized relationships.

Table 3-1 Types of Organization Chart Relationships Supplied by Novell

Type of Organizational Chart	Description
Manager - employee	Shows the reporting structure of managers and subordinates.
User group	Shows users and the groups in which they participate.

Margo Mackenzie changes her default relationship display to User Groups:



3.2.4 Expanding or Collapsing the Default Chart

The default relationship chart is Manager-Employee, unless you or your administrator sets it to another type. To expand or collapse the default chart:

- 1 Find a card for which you want to expand or collapse the default relationship display.
- 2 Click the *Expand/Collapse current relationship* toggle button.

The chart expands or collapses to display or hide the subsidiary cards that are related to your chosen card. For example, the following two views show the Expand view and then the Collapse view.



3.2.5 Choosing a Relationship to Expand or Collapse

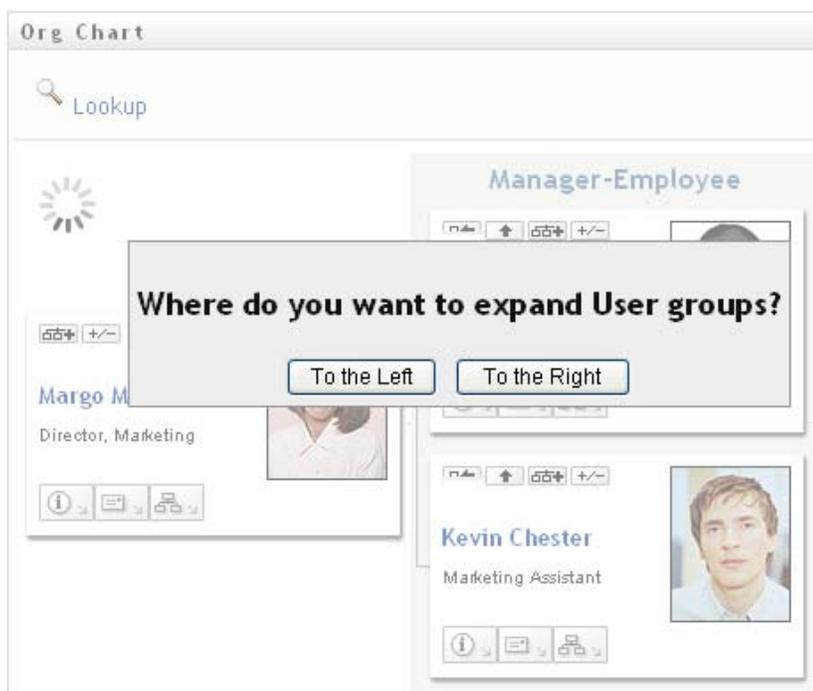
- 1 Identify a card whose relationships you want to view.
- 2 Click *Choose relationship to Expand/Collapse*  in that card. A drop-down list opens.
- 3 Select a relationship and action from the drop-down list:

Action	Description
Expand Manager-Employee	Select this option to open a Manager-Employee chart. Available if the chart is closed.
Expand User Groups	Select this option to open User groups. Available if User groups is closed.

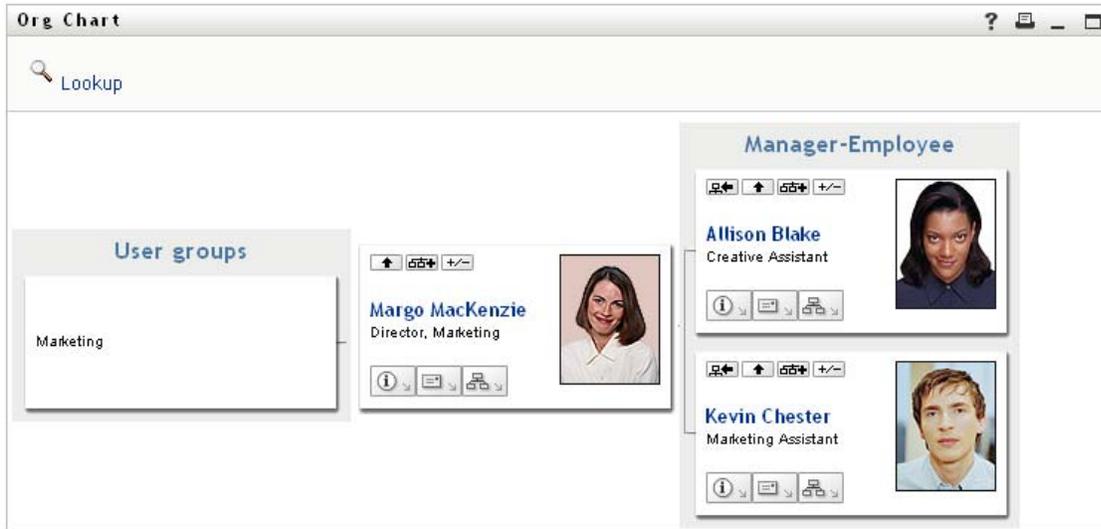
Action	Description
Collapse Manager-Employee	Select this option to collapse the Manager-Employee chart for a card. Available if the chart is open.
Collapse User Groups	Select this option to collapse User Groups for a card. Available if the chart is open.

Additional relationships are available in the list if your administrator defines them.

In the following example, Margo MacKenzie clicks *Choose relationship to Expand/Collapse* and selects *Expand User groups*:



She then clicks *To the Left* and sees the following:

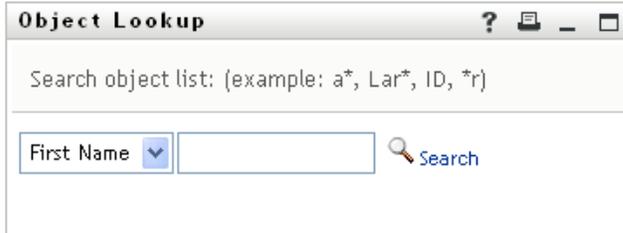


3.2.6 Looking Up a User in Organization Chart

You can look up a user in Organization Chart. This search is a quick way to find a user who is not in your current view or relationship chart. The looked-up user becomes the new root in your view.

- 1 Click the *Lookup* link at the top left corner of the chart.

The Lookup page displays:



- 2 Specify search criteria for the user you want:

2a Use the drop-down list to select whether the search is by *First Name* or *Last Name*.

2b In the text box next to the drop-down, type all or part of the name to search for.

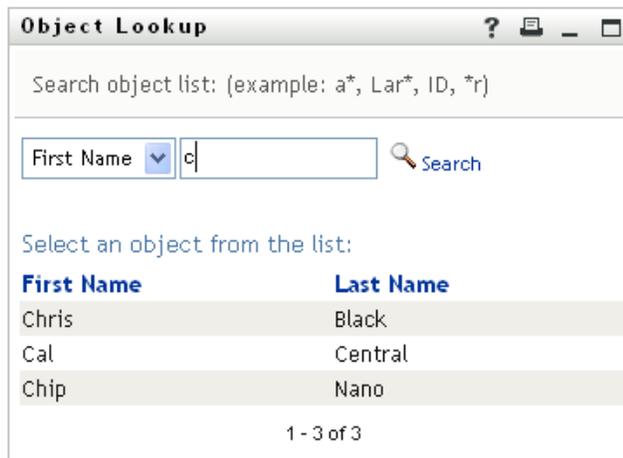
The search finds every name that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

For instance, all of the following examples find the first name Chip:

Chip
chip
c
c*
*p
h

- 3 Click *Search*.

The Lookup page displays your search results:



The screenshot shows a window titled "Object Lookup" with a search bar containing "Search object list: (example: a*, Lar*, ID, *r)". Below the search bar is a dropdown menu set to "First Name" and a text input field containing "c". A "Search" button is to the right. Below the search bar, it says "Select an object from the list:". A table displays the results:

First Name	Last Name
Chris	Black
Cal	Central
Chip	Nano

At the bottom of the table, it says "1 - 3 of 3".

If you see a list of users that includes the one you want, go to **Step 4**. Otherwise, go back to **Step 2**.

You can sort the search results in ascending or descending order by clicking the column headings.

- 4 Select the user you want from the list.

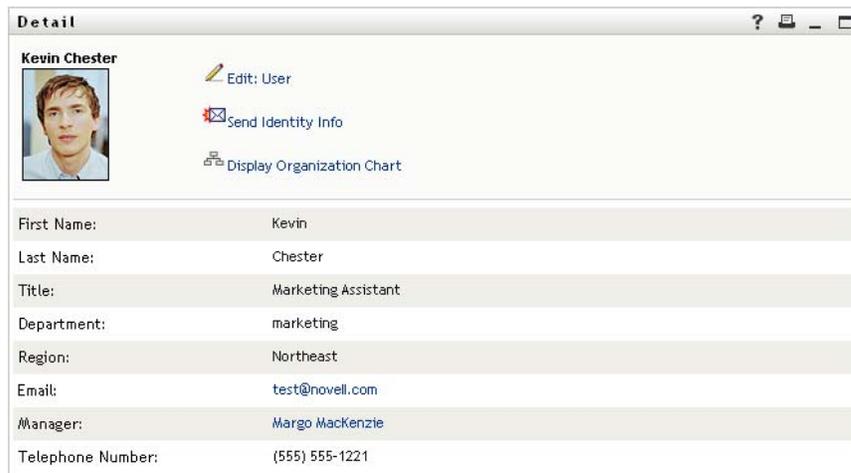
The Lookup page closes and makes that user the new root in your view of the chart.

3.3 Displaying Detailed Information

You can display details (the Profile page) for a selected user in the chart:

- 1 Find the card of a user whose details you want to display.
- 2 Click *Identity Actions*  on that card:
A drop-down list displays.
- 3 Click *Show Info* from the drop-down list. Additional options are listed if your administrator defines them.

The Profile page displays, showing detailed information about your chosen user:



This page is similar to your own My Profile page on the *Identity Self-Service* tab. However, as you view details about another user, you might not be authorized to see some of the data or perform some of the actions on the page. Consult your system administrator for assistance.

To learn about using the features of the Profile page, see [Chapter 5, “Using My Profile,” on page 49](#).

- 4 When you're done with the Profile page, you can close its window.

3.4 Sending E-Mail from a Relationship Chart

This section describes:

- ♦ [Section 3.4.1, “E-Mailing Information About a User in a Chart,” on page 41](#)
- ♦ [Section 3.4.2, “Sending New E-Mail to a User in the Chart,” on page 42](#)
- ♦ [Section 3.4.3, “Sending E-Mail to a Manager’s Team,” on page 43](#)

3.4.1 E-Mailing Information About a User in a Chart

- 1 Find the card of a user whose details you want to e-mail to someone.
- 2 Click the e-mail icon  on the card:

A pop-up menu displays.

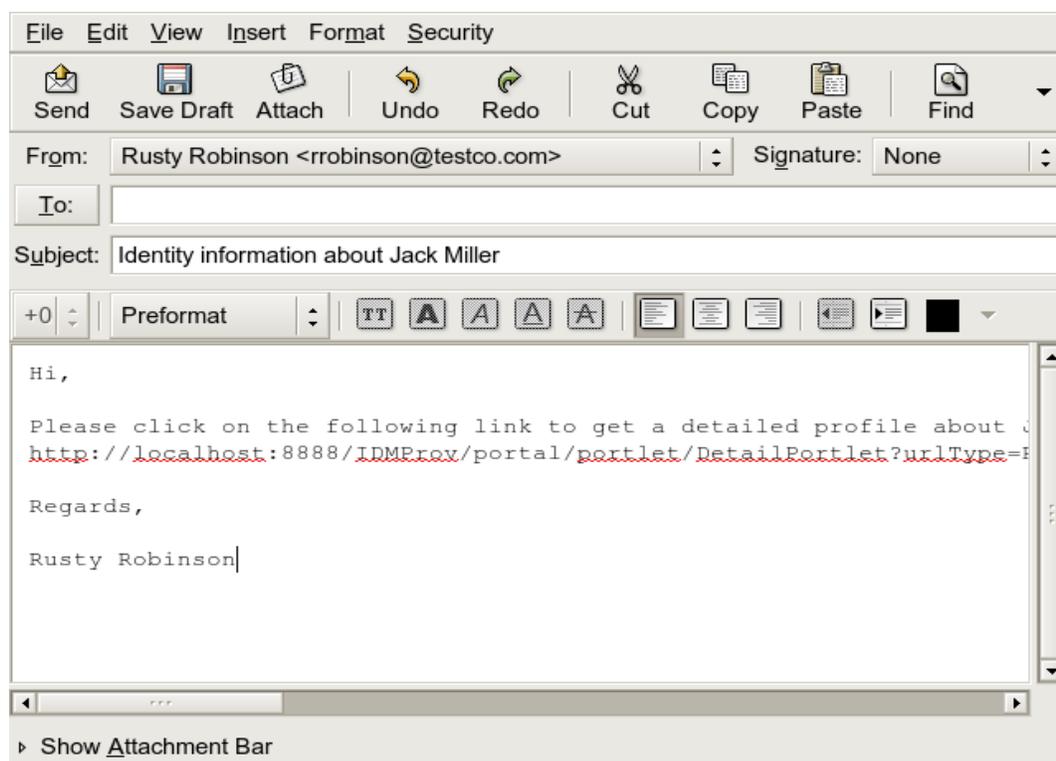
- 3 Select *Email Info*.

A new message is created in your default e-mail client. The following parts of the message are already filled in for you:

This part of the message	Contains
Subject	The text: Identity Information for <i>user-name</i>

This part of the message	Contains
Body	<p>Greeting, message, link, and sender's name.</p> <p>The link (URL) is to the Profile page that displays detailed information about your chosen user.</p> <p>This link prompts the recipient to log in to the Identity Manager User Application before it displays any information. The recipient must have appropriate authority to view or edit the data.</p> <p>To learn about using the features of the Profile page, see Chapter 5, "Using My Profile," on page 49.</p>

For example:



- 4 Specify the recipients of the message (and any additional content that you want).
- 5 Send the message.

3.4.2 Sending New E-Mail to a User in the Chart

- 1 Find the card of a user to whom you want to send e-mail.
- 2 Click the e-mail icon  on the card.
 - A pop-up menu displays.
- 3 Select *New Email*.

A new message is created in your default e-mail client. The message is blank except for the *To* list, which specifies your chosen user as a recipient.

- 4 Fill in the message contents.
- 5 Send the message.

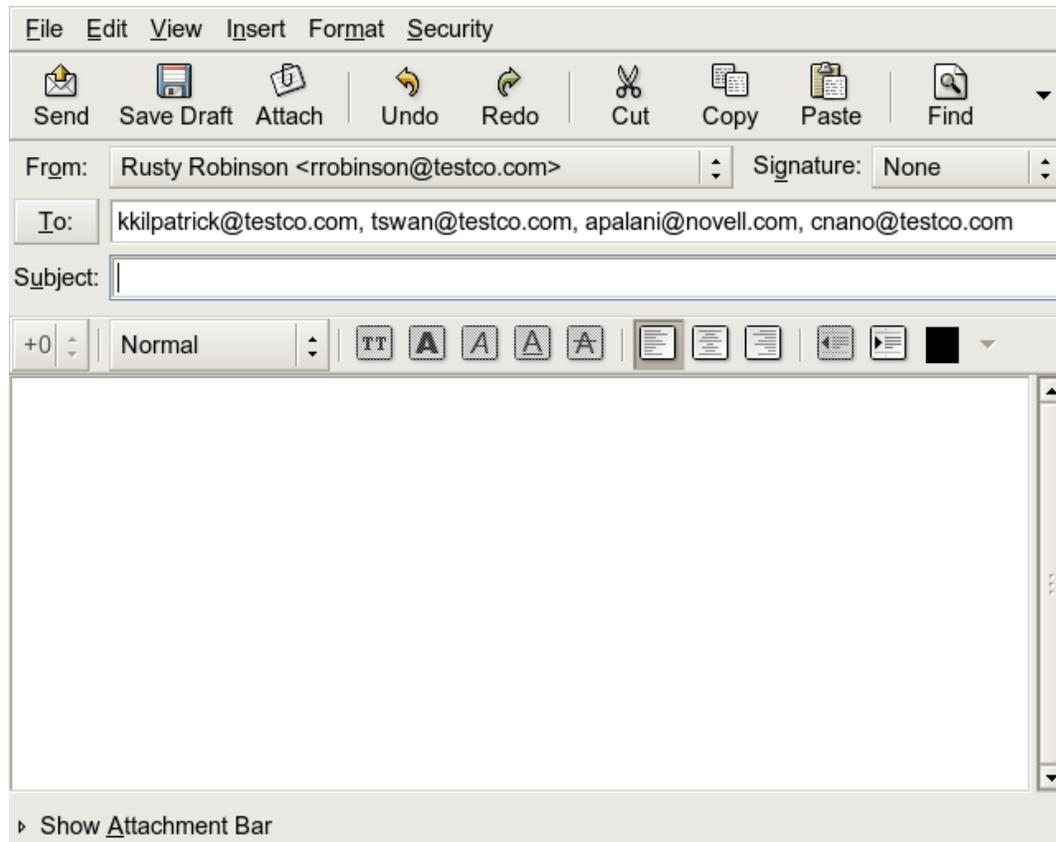
3.4.3 Sending E-Mail to a Manager's Team

- 1 Find the card of a user who manages a team to whom you want to send e-mail.
- 2 Click the e-mail icon  on the card:

A pop-up menu displays.

- 3 Select *Email to team*.

A new message is created in your default e-mail client. The message is blank except for the *To* list, which specifies each immediate subordinate of your chosen user (manager) as a recipient.



- 4 Fill in the message contents.
- 5 Send the message.

Using the Associations Report

4

This section tells you how to use the Associations Report page on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include

- ♦ [Section 4.1, “About the Associations Report,” on page 45](#)
- ♦ [Section 4.2, “Displaying Associations,” on page 46](#)

NOTE: This section describes the default features of the Associations Report page. You might encounter some differences because of your job role, your level of authority, and customizations made for your organization; consult your system administrator for details.

For more general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

4.1 About the Associations Report

As an administrator, you can use the Associations Report page to list or troubleshoot some of the associations with which users have been provisioned. The application table shows:

- ♦ Application or system names for which the user has an association in the DirXML-Associations table in the Identity Vault. (The associations table is populated when the Identity Vault synchronizes a user account with a connected system through a policy or an entitlement.)
- ♦ The instance of the association.
- ♦ The status of the association. See [Table 4-1](#) for status descriptions.

Table 4-1 Association Status Table

Status	Indicates
Processed	A driver recognizes the user for the driver's target application. Users might want to check whether they need to issue a provisioning request for an application or system that does not appear in their associations lists. Or, if an application is in their lists but they cannot access it, users might want to check with their application administrators to determine the problem.
Disabled	The application is probably unavailable to the user.
Pending	The association is waiting for something.
Manual	A manual process is required to implement the association.
Migrate	Migration is required.
ANY	Miscellaneous kinds of status.

Not all provisioned resources are represented in the Identity Vault.

[Figure 4-1 on page 46](#) shows an example of the Associations Report page.

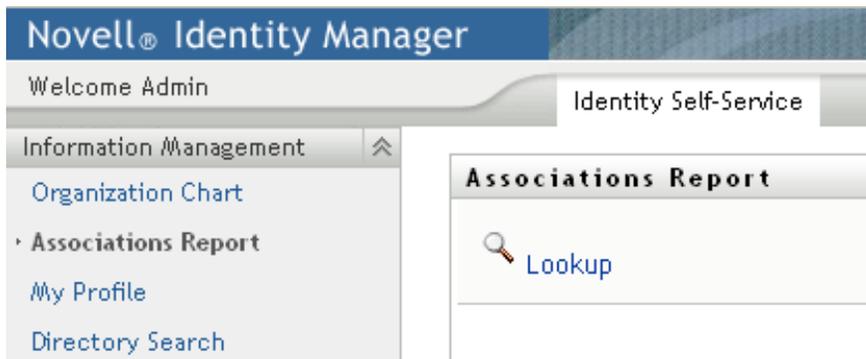
Figure 4-1 The Associations Report Page



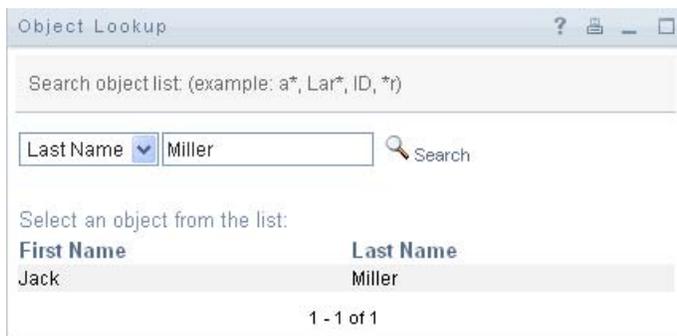
4.2 Displaying Associations

When you click *Associations Report*, the first associations shown are your own. To display another user's associations:

- 1 On the *Identity Self-Service* tab, under *Information Management*, click *Associations Report*.
- 2 Above the associations table, click *Lookup*.



- 3 In the Object Lookup window, select *First Name* or *Last Name* from the drop-down menu and specify a search string. The Object Lookup window displays both *First Name* and *Last Name*.



4 Select a name. The associations table displays associations for that name.

Identity Self-Service Requests & Approvals Administration

Associations Report ? - □

 Lookup

Resolving jmiller...

Name	Instance	State
Loopback Driver	GroupEntitlementLoopback	Processed

Using My Profile

5

This section tells you how to use the My Profile page on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 5.1, “About My Profile,” on page 49](#)
- ◆ [Section 5.2, “Editing Your Information,” on page 50](#)
- ◆ [Section 5.3, “E-Mailing Your Information,” on page 55](#)
- ◆ [Section 5.4, “Displaying Your Organization Chart,” on page 56](#)
- ◆ [Section 5.5, “Linking to Other Users or Groups,” on page 57](#)

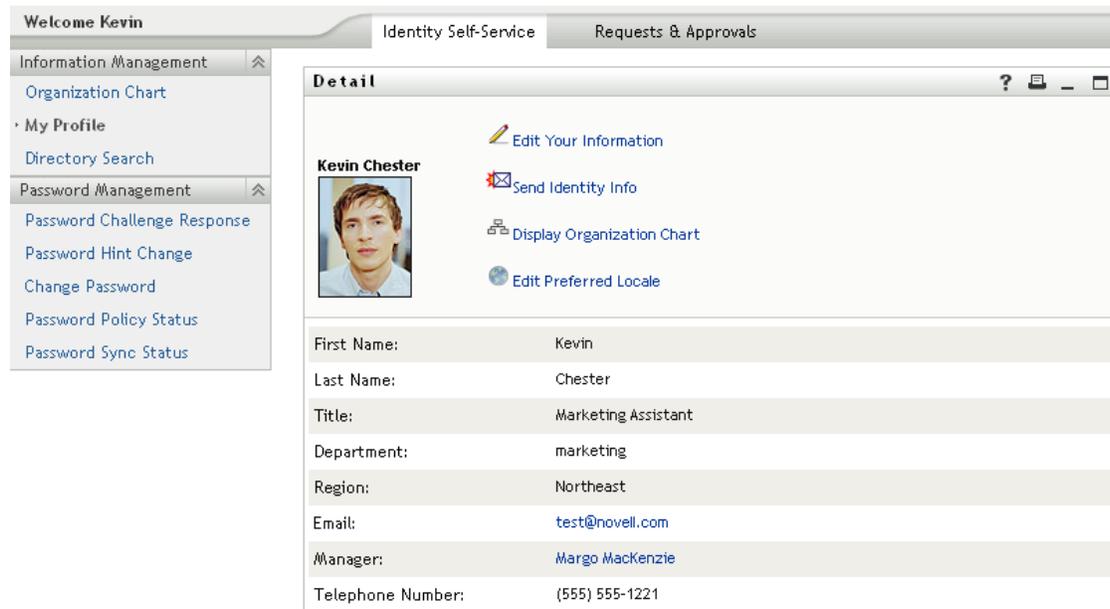
NOTE: This section describes the default features of the My Profile page. You might encounter some differences because of your job role, your level of authority, and customizations made for your organization; consult your system administrator for details.

For more general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

5.1 About My Profile

You can use the My Profile page to display the details for your user account and to work with that information, as needed. For example, here’s what Kevin Chester (Marketing Assistant) sees when he goes to the My Profile page:

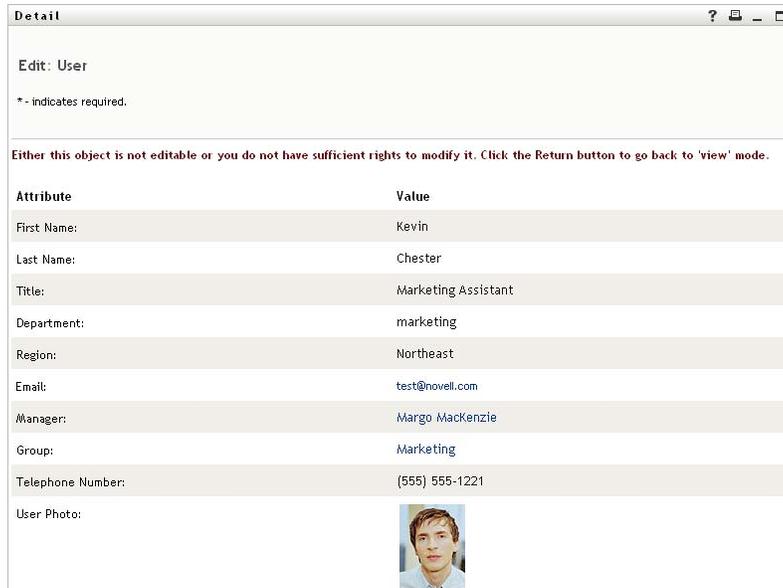
Figure 5-1 My Profile Detail Page



If you want to change some of these details, you can edit your information (although it’s up to the system administrator to determine exactly what you are authorized to edit). For instance, suppose

Kevin Chester clicks *Edit Your Information*. He sees a page in which he can edit Profile information, after his administrator gives him privileges to do so:

Figure 5-2 *Edit Profile Page*



Back on the main (viewing) page, My Profile provides links for performing other useful actions on your information. You can:

- ◆ Send your details (in the form of a link) to someone by e-mail
- ◆ Switch to displaying your organization chart instead of your details
- ◆ If authorized, select another user or group in the organization chart whose details you want to display
- ◆ Click an e-mail address to send a message to that account
- ◆ Specify a locale (language) for the instance of the User Application that you use.

5.2 Editing Your Information

My Profile provides an editing page that you can switch to when you want to make changes.

Some values might not be editable. Uneditable values appear on the editing page as read-only text or as links. If you have questions about what you're authorized to edit, consult your system administrator.

To edit your information:

- 1 Click the *Edit Your Information* link at the top of the My Profile page.
- 2 When the editing page displays, make your changes as needed. Use the editing buttons in [Table 5-1](#).
- 3 When you're done editing, click *Save Changes*, then click *Return*.

5.2.1 Hiding Information

Hiding a piece of your information hides it from everyone using the Identity Manager User Application, except you and the system administrator.

- 1 Click the *Edit Your Information* link at the top of the My Profile page.
- 2 On the editing page, find an item that you want to hide.
- 3 Click *Hide* next to that item.

Hide might be disabled for some items. The system administrator can enable this feature for specific items.

5.2.2 Using the Editing Buttons

Table 5-1 lists the editing buttons you can use to edit your profile details.

Table 5-1 *Editing Buttons*

Button	What it does
	Looks up a value to use in an entry
	Displays a <i>History</i> list of values used in an entry
	Adds another entry
	Displays all entries for the attribute
	Deletes an existing entry and its value
	Lets you edit (specify and display) an image

NOTE: Add and delete groups in separate editing operations. If you remove and add groups in the same editing operation, the deleted group name reappears when the + (add) button is clicked.

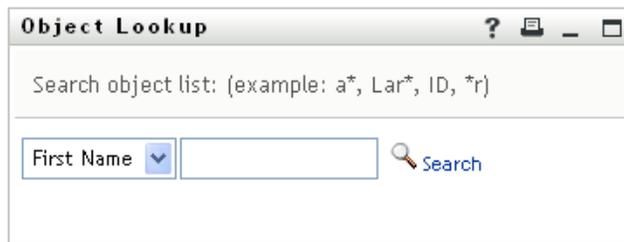
The following sections tell you more about using some of these editing buttons:

- ♦ [“Looking Up a User” on page 51](#)
- ♦ [“Looking Up a Group” on page 53](#)
- ♦ [“Using the History List” on page 54](#)
- ♦ [“Editing an Image” on page 55](#)

Looking Up a User

- 1 Click *Lookup*  to the right of an entry (for which you want to look up a user).

The Lookup page displays:



The screenshot shows a window titled "Object Lookup" with a search bar containing the text "Search object list: (example: a*, Lar*, ID, *r)". Below the search bar is a dropdown menu set to "First Name" and an empty text input field. To the right of the text field is a magnifying glass icon and the word "Search".

2 Specify search criteria for the user you want:

2a Use the drop-down list to specify a search by *First Name* or *Last Name*.

2b In the text box next to the drop-down list, type all or part of the name to search for.

The search finds every name that begins with the text you type. It is not case sensitive.

You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

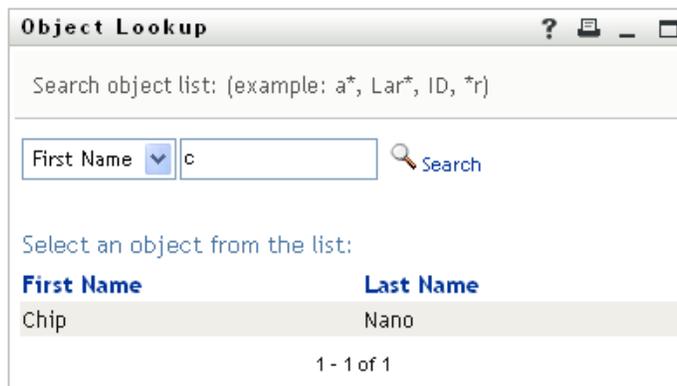
For instance, all of the following examples find the first name Chip:

Chip
chip
c
c*
*p
h

A manager lookup searches only for users who are managers.

3 Click *Search*.

The Lookup page displays your search results:



The screenshot shows the "Object Lookup" window with the search criteria "First Name" and "c" entered. Below the search bar, it says "Select an object from the list:". A table displays the search results:

First Name	Last Name
Chip	Nano

At the bottom of the table, it says "1 - 1 of 1".

If you see a list of users that includes the one you want, go to **Step 4**. Otherwise, go back to **Step 2**.

You can sort the search results in ascending or descending order by clicking the column headings.

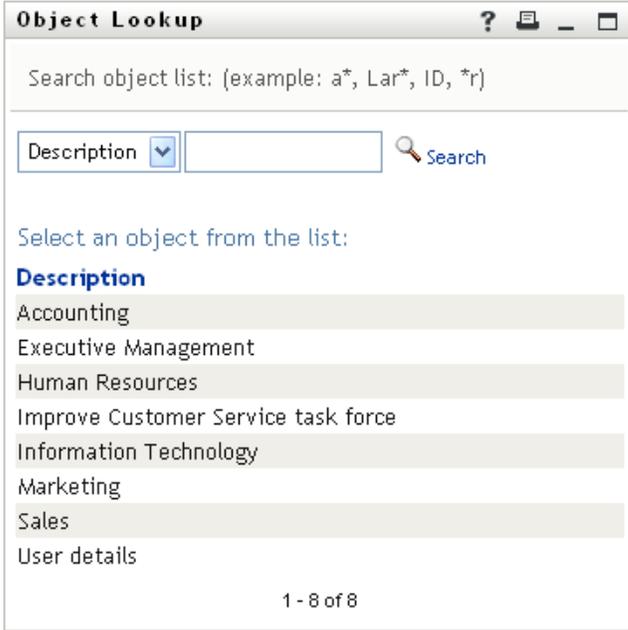
4 Select the user you want from the list.

The Lookup page closes and inserts the name of that user into the appropriate entry on the editing page.

Looking Up a Group

- 1 Click *Lookup*  to the right of an entry (for which you want to look up a group).

The Lookup page displays:



Object Lookup

Search object list: (example: a*, Lar*, ID, *r)

Description  Search

Select an object from the list:

Description

- Accounting
- Executive Management
- Human Resources
- Improve Customer Service task force
- Information Technology
- Marketing
- Sales
- User details

1 - 8 of 8

- 2 Specify search criteria for the group you want:

2a In the drop-down list, your only choice is to search by *Description*.

2b In the text box next to the drop-down list, type all or part of the description to search for.

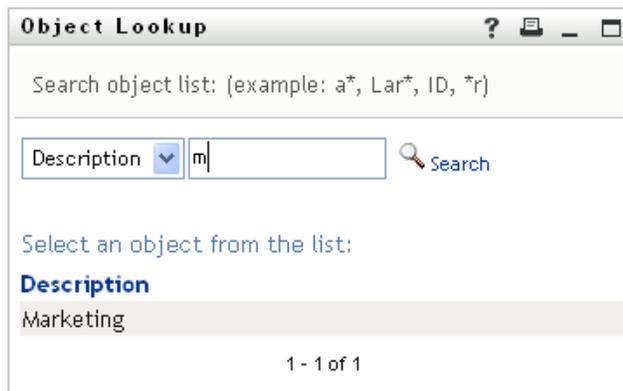
The search finds every description that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

For instance, all of the following examples find the description Marketing:

```
Marketing
marketing
m
m*
*g
*k*
```

- 3 Click *Search*.

The Lookup page displays your search results:



If you see a list of groups that includes the one you want, go to [Step 4](#). Otherwise, go back to [Step 2](#).

You can sort the search results in ascending or descending order by clicking the column heading.

- 4 Select the group you want from the list.

The Lookup page closes and inserts the group into the appropriate entry on the editing page.

Using the History List

- 1 Click *History*  to the right of an entry (whose previous values you want to see).

The *History* list displays. Values appear in alphabetical order.



- 2 Do one of the following:

If you want to	Do this
Pick from the <i>History</i> list	<p>Select a value that you want from the list.</p> <p>The <i>History</i> list closes and inserts that value into the appropriate entry on the editing page.</p>
Clear the <i>History</i> list	<p>Click <i>Clear History</i>.</p> <p>The <i>History</i> list closes and deletes its values for this entry. Clearing the <i>History</i> list does not change the current value of the entry on the editing page.</p>

Editing an Image

Editing your information might involve adding, replacing, or displaying an image:

- 1 On the editing page, click *Display* to display an image.
- 2 Click the plus sign icon  [Add Image](#) to add an image.  [Replace or Delete Image](#)
If an image already exists, you can click the pencil icon [Delete Image](#) to replace or remove it.
- 3 Click that button to display the File Upload page:



If this item already has an image, that image displays here.

- 4 To add an image or to replace the current one:
 - 4a Click *Browse* and select an appropriate image file (such as a GIF or JPG).
 - 4b Click *Save Changes* to upload the selected image file to the server.
- 5 Click *Close Window* to return to the editing page.

5.3 E-Mailing Your Information

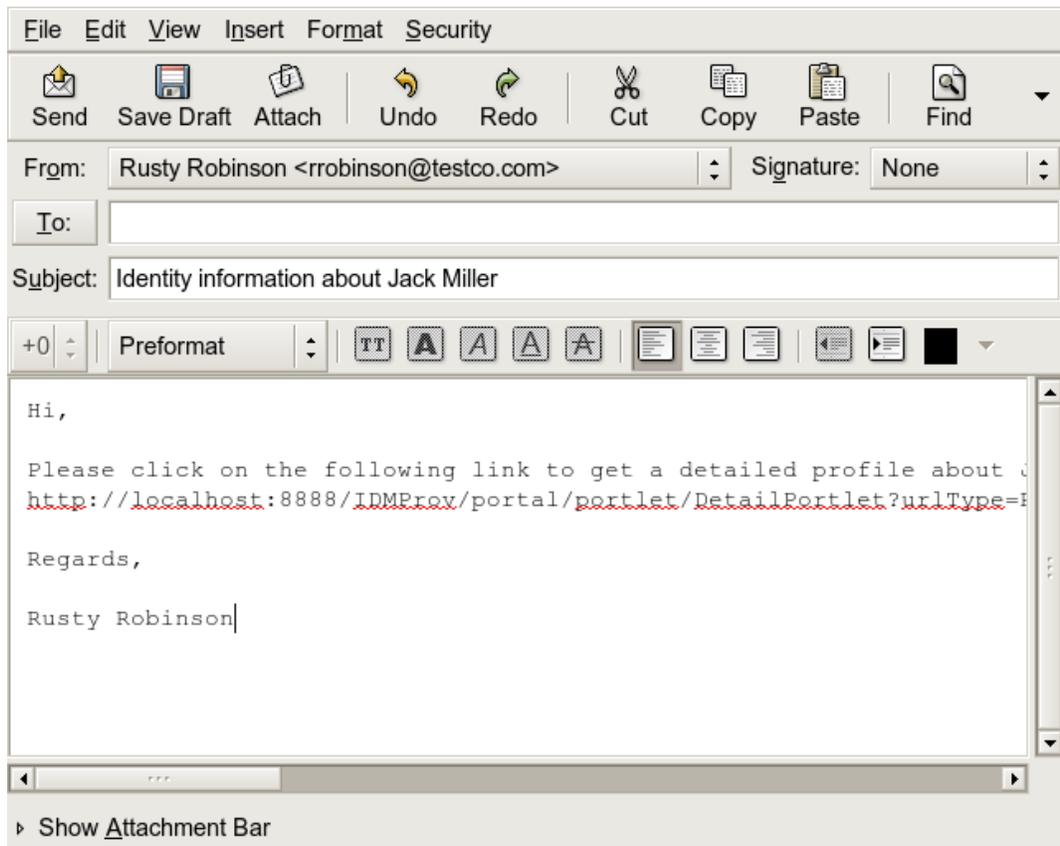
The My Profile page enables e-mailing details as links:

- 1 Click the *Send Identity Info* link toward the top of the My Profile page.

A new message is created in your default e-mail client. The following parts of the message are already filled in for you:

This part of the message	Contains
Subject	The text: <code>Identity Information for your-user-id</code>
Body	A greeting, message, link, and your name. The link (URL) is to the Profile page that displays detailed information about you. This link prompts the recipient to log in to the Identity Manager User Application before it displays any information. The recipient must have appropriate authority to view or edit the data.

For example:



- 2 Specify the recipients of the message (and any additional content that you want).
- 3 Send the message.

5.4 Displaying Your Organization Chart

To switch from My Profile to Organization Chart, click the *Display Organization Chart* link toward the middle of the My Profile page.

Your organization chart displays. For example:



To learn about using the features of this page, see [Chapter 3, “Using the Organization Chart,”](#) on [page 31](#).

5.5 Linking to Other Users or Groups

The Detail page of your profile can include links to other users or groups. You can display the details (Profile page) for any other user or group that is listed as a link in your details.

To display detailed information about another user or group:

- 1 While viewing or editing information on the My Profile page, look for links that refer to the names of users or groups. Move your mouse cursor over text to reveal the underline that indicates a link.
- 2 Click a link to display the details for that user or group (in a separate window).
- 3 When you're done with that detail window, you can close it.

Here's a scenario that shows how someone might link to other user and group details. Timothy Swan (Vice President of Marketing) logs in to the Identity Manager User Application and goes to the My Profile page:

Figure 5-3 The My Profile Page Shows Profile Details and Lists Profile Actions

Welcome Timothy Identity Self-Service Requests & Approvals

Information Management

- Organization Chart
- My Profile
- Directory Search

Password Management

- Password Challenge Response
- Password Hint Change
- Change Password
- Password Policy Status
- Password Sync Status

Detail

Timothy Swan



- Edit Your Information
- Send Identity Info
- Display Organization Chart
- Edit Preferred Locale

First Name:	Timothy
Last Name:	Swan
Title:	Director, Marketing, Vice President
Department:	management
Region:	Northeast
Email:	test@novell.com
Manager:	Terry Mellon
Telephone Number:	(555) 555-1204

He clicks *Edit Your Information*.

Figure 5-4 The Edit Detail Page

Attribute	Value
First Name:*	Timothy
Last Name:*	Swan
Title:	Vice President, Marketing
Department:	management
Region:	Northeast
Email:	test@novell.com
Manager:	Terry Mellon
Group:	Executive Management Improve Customer Service task force Marketing
Telephone Number:	(555) 555-1204

He notices user names (Terry Mellon) and group names (Executive Management, Marketing, Improve Customer Service task force) that appear as links. He clicks *Marketing* and sees a new window:

Figure 5-5 The Group Detail Page

Marketing

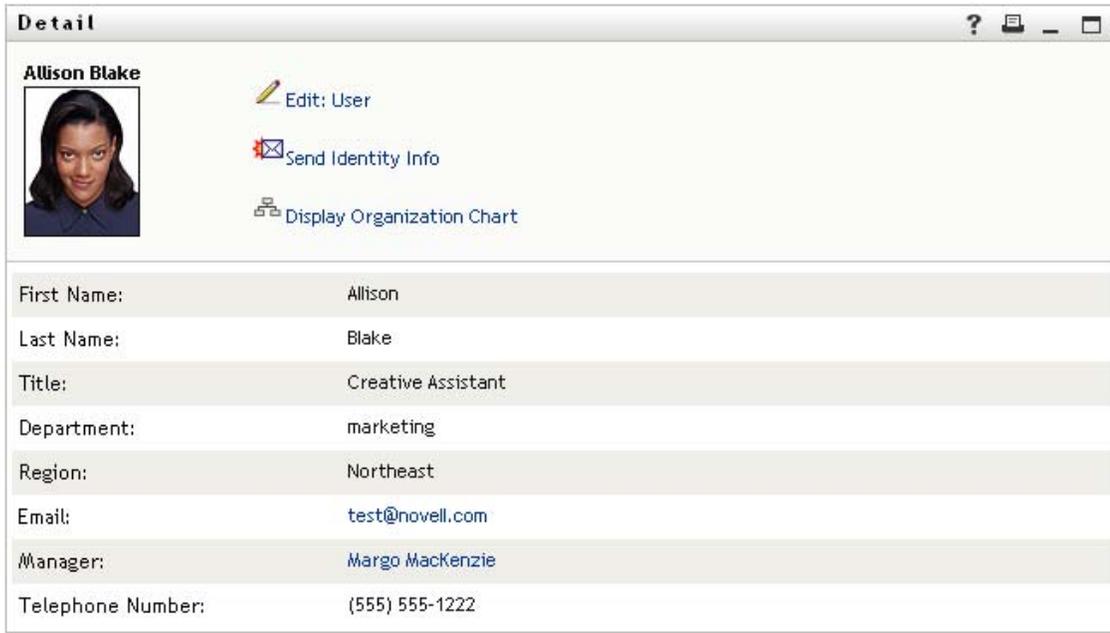
Description: Marketing

Members: Timothy Swan, Margo MacKenzie, Kevin Chester, Allison Blake

This is the detailed information about the Marketing group. If he has permission, he can click *Edit Group* and use the *Edit Group* page to add or remove members from the group, change the group description, or even delete the group.

The names of the Marketing group's members are also links. He clicks *Allison Blake* and sees:

Figure 5-6 The Group Detail Page Links to Group Members' Profiles



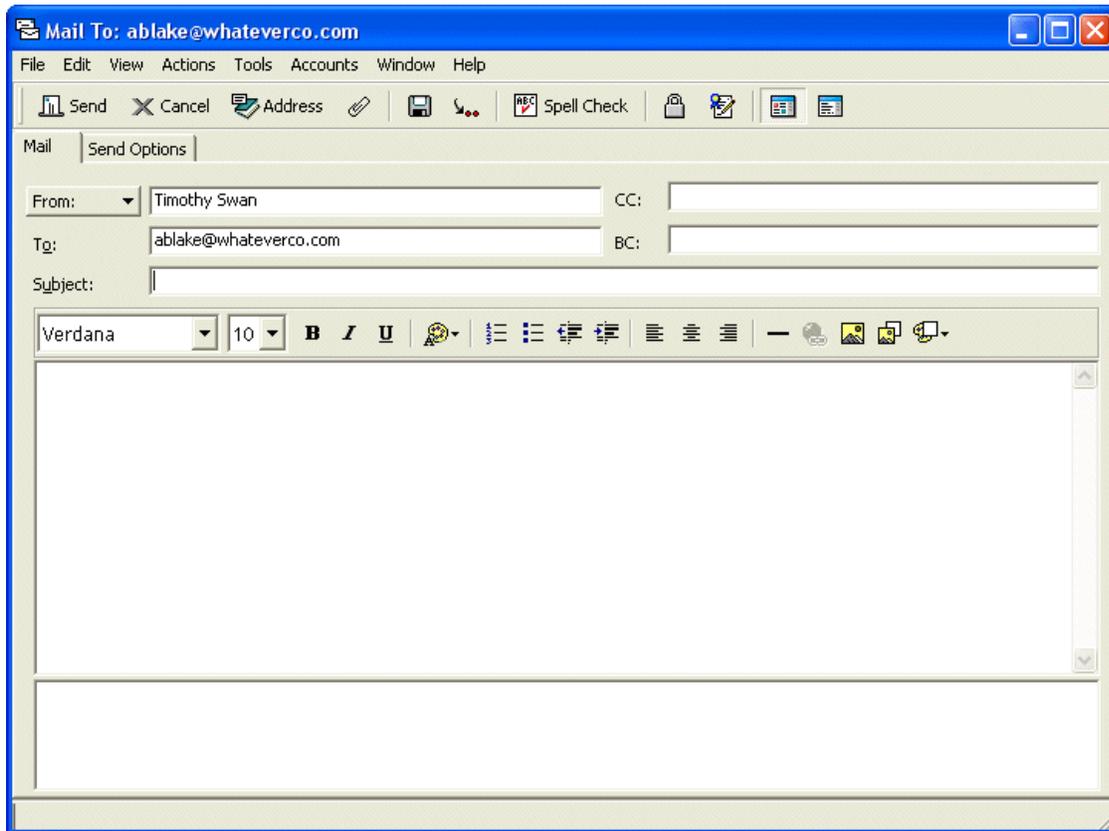
First Name:	Allison
Last Name:	Blake
Title:	Creative Assistant
Department:	marketing
Region:	Northeast
Email:	test@novell.com
Manager:	Margo Mackenzie
Telephone Number:	(555) 555-1222

This is the detailed information about user Allison Blake (one of his employees).

He can click *Edit: User*, and, if the system administrator has given him the ability to do so, edit this user's details (except the Department and Region attributes) or delete this user.

Allison's e-mail address is a link. When he clicks it, his e-mail client creates a new message to her:

Figure 5-7 E-Mail Message to User from User's Profile Page



He can now type the message contents and send it.

5.6 Choosing a Preferred Language

You can select the locale (language) that you prefer to use in the Identity Manager User Application. You can set the preferred locale at any time in *My Profile*.

- 1 Click *Identity Self-Service > Information Management > My Profile > Edit Preferred Locale*. The *Edit Preferred Locale* page opens.
- 2 Add a locale by opening the *Available Locales* drop-down list, selecting a locale, and clicking *Add*.
- 3 Change the order of preference by selecting a locale from the *Locales in order of preference list* and choosing *Move Up*, *Move Down*, or *Remove*.
- 4 Click *Save Changes*.

Edit Preferred Locale

User: Chip Nano
Set Locale Preferences for the user in the current Application.

Locales in order of preference

Available Locales

The Identity Manager User Application pages are displayed in one or more preferred languages (locales) according to these rules:

1. The User Application uses locales defined in the User Application, according to the order in the preferred-locale list.
2. If no preferred locale is defined for the User Application, the User Application uses the preferred browser languages in the order listed.
3. If no preferred locale is defined for the User Application or the browser, the User Application default is used.

5.6.1 Defining a Preferred Language in the Browser

In Firefox*, add languages through *Tools > General > Languages > Languages*. Place your preferred language at the top of the list. In Internet Explorer, set language through *View > Encoding*.

Using Directory Search

This section tells you how to use the Directory Search page on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 6.1, “About Directory Search,” on page 63](#)
- ◆ [Section 6.2, “Performing Basic Searches,” on page 66](#)
- ◆ [Section 6.3, “Performing Advanced Searches,” on page 66](#)
- ◆ [Section 6.4, “Working with Search Results,” on page 75](#)
- ◆ [Section 6.5, “Using Saved Searches,” on page 81](#)

NOTE: This section describes the default features of the Directory Search page. You might encounter some differences because of your job role, your level of authority, and customizations made for your organization; consult your system administrator for details.

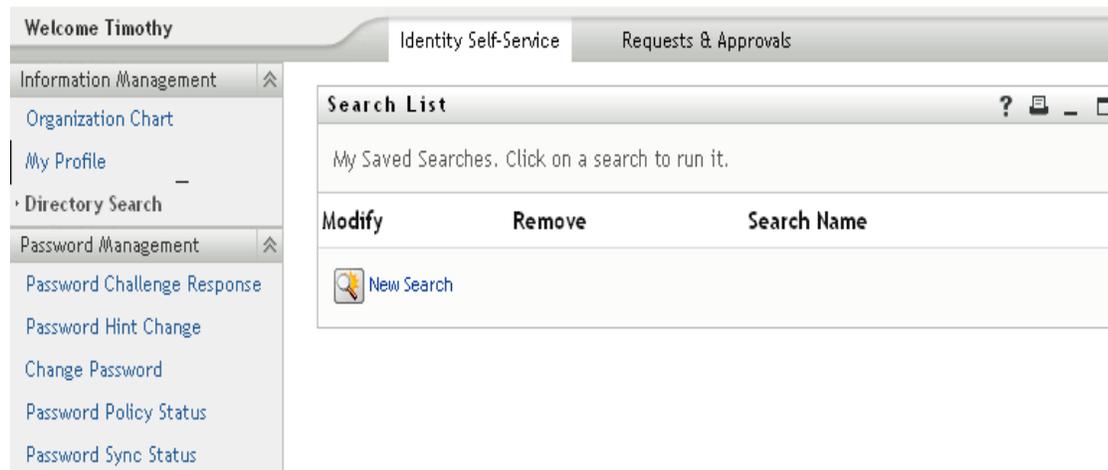
For more general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

6.1 About Directory Search

You can use the Directory Search page to search for users, groups, or teams by entering search criteria or by using previously saved search criteria.

For example, suppose Timothy Swan (Marketing Director) needs to search for information about someone in his organization. He goes to the Directory Search page and sees this by default:

Figure 6-1 *Directory Search Page*



He doesn't yet have any saved searches to select from, so he selects *New Search*.

There's a user he wants to contact whose first name begins with the letter C, but he can't remember the full name. He just needs to specify a basic search with this criterion:

Figure 6-2 Specify a Search Criterion on the Search List Page

The screenshot shows a window titled "Search List" with a search interface. At the top, it says "Basic Search." Below that, there is a "Search for:" dropdown menu set to "User". Underneath, there are three columns: "Item Category", "Expression", and "Search Term". The "Item Category" dropdown is set to "First Name", the "Expression" dropdown is set to "starts with", and the "Search Term" text box contains the letter "C". A "Search" button is located below these fields. At the bottom of the window, there are two icons: "My Saved Searches" and "Advanced Search".

The search results display, enabling Timothy to examine and work with his requested information. By default, *Identity* tab information is displayed:

Figure 6-3 Search Results

The screenshot shows the "Search Results" page. It displays the search criteria: "User: (First Name starts with C)", "Sorted by: Last Name", and "Total Matches: 3". Below this, there are three tabs: "Identity", "Location", and "Organization". The "Identity" tab is selected, showing a table with the following data:

First Name	Last Name	Title	Email	Telephone Number
Chris	Black	Sales Director, Black	✉	(555) 555-1338
Cal	Central	VP, North American Sales	✉	(555) 555-1209
Chip	Nano	Chief Information Officer	✉	(555) 555-1222

Below the table, it says "1 - 3 of 3". At the bottom of the window, there are five icons: "My Saved Searches", "Save Search", "Export Results", "Revise Search", and "New Search".

Timothy clicks the *Organization* tab in the search results to get another view of the information. He recalls that the person he seeks works for Kip Keller, so that narrows it down to Cal Central:

Figure 6-4 Use Tabs to Change Views of Search Results



In addition to the tabs for different views, the search results page provides links and buttons for performing actions on its information. You can:

- ◆ Sort the rows of information by clicking the column headings
- ◆ Display details (Profile page) for a user or group by clicking its row
- ◆ Send new e-mail to a user by clicking the e-mail icon in that user's row
- ◆ Save the search for future reuse
- ◆ Export the results to a text file
- ◆ Revise the search by changing its criteria

When generating search results, you might sometimes need more than a basic search to describe the information you want. You can use an advanced search to specify complex criteria.

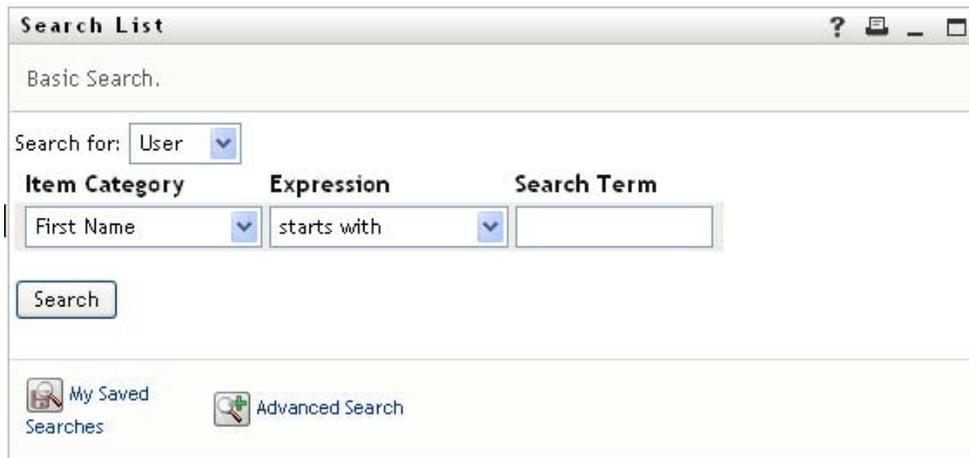
If there's an advanced search that you might need to perform again, you can retain it as a saved search. Saved searches are even handy for basic searches that you run frequently. For instance, Timothy Swan has added a couple of saved searches that he often uses:

Figure 6-5 Saved Searches, on the Search List Page



6.2 Performing Basic Searches

- 1 Go to the Directory Search page and click *New Search*. The Basic Search page displays by default:



The screenshot shows a web browser window titled "Search List" with a "Basic Search" page. The page has a search form with the following elements:

- A "Search for:" label followed by a dropdown menu currently set to "User".
- A table with three columns: "Item Category", "Expression", and "Search Term".
- Under "Item Category", a dropdown menu is set to "First Name".
- Under "Expression", a dropdown menu is set to "starts with".
- Under "Search Term", there is an empty text input box.
- A "Search" button is located below the table.
- At the bottom, there are two links: "My Saved Searches" (with a folder icon) and "Advanced Search" (with a magnifying glass icon).

- 2 In the *Search for* drop-down list, specify the type of information to find by selecting *Group* or *User*.
- 3 In the *Item Category* drop-down list, select an attribute to search on. For example:
Last Name
The list of available attributes is determined by what you're searching for (users or groups).
- 4 In the *Expression* drop-down list, select a comparison operation to perform against your chosen attribute. For example:
equals
For more information, see [Section 6.3.1, "Selecting an Expression," on page 69](#).
- 5 In the *Search Term* entry box, specify a value to compare against your chosen attribute. For example:
Smith
For more information, see [Section 6.3.2, "Specifying a Value for Your Comparison," on page 70](#).
- 6 Click *Search*.
Your search results display.
To learn about what to do next, see [Section 6.4, "Working with Search Results," on page 75](#).

6.3 Performing Advanced Searches

If you need to specify multiple criteria when searching for users or groups, you can use an advanced search. For example:

```
Last Name equals Smith AND Title contains Rep
```

If you specify multiple criteria groupings (to control the order in which criteria are evaluated), you'll use the same logical operations to connect them. For example, to perform an advanced search with the following criteria (two criteria groupings connected by an or):

(Last Name equals Smith AND Title contains Rep) OR (First Name starts with k AND Department equals Sales)

specify the following shown in **Figure 6-6** on page 67:

Figure 6-6 Specifying an Advanced Search on the Search List Page

Search List

Advanced Search. Specify one or more criteria for your search.

Search for:

With this criteria:

Operator	Item Category	Expression	Search Term	Add/Remove Criteria
and	Last Name	equals	Smith	<input type="checkbox"/> <input type="checkbox"/>
	Title	contains	Rep	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Remove Criteria Grouping				

or

With this criteria:

Operator	Item Category	Expression	Search Term	Add/Remove Criteria
and	First Name	starts with	k	<input type="checkbox"/> <input type="checkbox"/>
	Department	equals	Sales	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Remove Criteria Grouping				

Add Criteria Grouping

The result of this search is shown in **Figure 6-7** on page 67.

Figure 6-7 Result of Advanced Search

Search List

Search Results. Use the tabs below for different views of your result set.

User: (Last Name equals Smith and Title contains Rep) -or- (First Name starts with k and Department equals Sales)

Sorted by: Department

Total Matches: 5

Identity	Location	Organization
First Name	Last Name	Title
Jane	Smith	HR, Representative
Kate	Smith	Sales Representative
Ken	Carson	Account Executive
Kevin	Chang	Account Executive
Kip	Keller	VP, North American Sales

1 - 5 of 5

To perform an advanced search:

- 1 Go to the Directory Search page and click *New Search*. The Basic Search page displays by default.
- 2 Click *Advanced Search*. The Advanced Search page displays:

Search List

Advanced Search. Specify one or more criteria for your search.

Search for: User

With this criteria:

Item Category	Expression	Search Term	Add/Remove Criteria
First Name	starts with		+

Search

+ Add Criteria Grouping

My Saved Searches

Basic Search

- 3 In the *Search for* drop-down list, specify the type of information to find by selecting one of the following:
 - ◆ Group
 - ◆ User

You can now fill in the *With this criteria* section.

- 4 Specify a criterion of a criteria grouping:
 - 4a Use the *Item Category* drop-down list to select an attribute to search on. For example:
Last Name
The list of available attributes is determined by what you're searching for (users or groups).
 - 4b Use the *Expression* drop-down list to select a comparison operation to perform against your chosen attribute. For example:
equals
For more information, see [Section 6.3.1, "Selecting an Expression," on page 69](#).
 - 4c Use the *Search Term* entry to specify a value to compare against your chosen attribute. For example:
Smith
For more information, see [Section 6.3.2, "Specifying a Value for Your Comparison," on page 70](#).
- 5 If you want to specify another criterion of a criteria grouping:
 - 5a Click *Add Criteria* on the right side of the criteria grouping:



5b On the left side of the new criterion, use the *Criteria Logical Operator* drop-down list to connect this criterion with the preceding one; select either *and* or *or*. You can use only one of the two types of logical operator within any one criteria grouping.

5c Repeat this procedure, starting with **Step 4**.

To delete a criterion, click *Remove Criteria* to its right: 

6 If you want to specify another criteria grouping:

6a Click *Add Criteria Grouping*:

 Add Criteria Grouping

6b Above the new criteria grouping, use the *Criteria Grouping Logical Operator* drop-down list to connect this grouping with the preceding one; select either *and* or *or*.

6c Repeat this procedure, starting with **Step 4**.

To delete a criteria grouping, click *Remove Criteria Grouping* directly above it:  Remove Criteria Grouping

7 Click *Search*.

Your search results display.

To learn about what to do next, see [Section 6.4, “Working with Search Results,” on page 75](#).

6.3.1 Selecting an Expression

Click *Expression* to select a comparison criterion for your search. The list of comparison (relational) operations available to you in a criterion is determined by the type of attribute specified in that criterion:

Table 6-1 Comparison Operations for Searching

If the attribute is a	You can select one of these comparison operations
String (text)	<ul style="list-style-type: none"> ◆ starts with ◆ contains ◆ equals ◆ ends with ◆ is present ◆ does not start with ◆ does not contain ◆ does not equal ◆ does not end with ◆ is not present
String (text) with a predetermined list of choices	<ul style="list-style-type: none"> ◆ equals
User or group (or other object identified by DN)	<ul style="list-style-type: none"> ◆ is present
Boolean (true or false)	<ul style="list-style-type: none"> ◆ does not equal ◆ is not present

If the attribute is a	You can select one of these comparison operations
User (item category: Manager, Group, or Direct Reports)	<ul style="list-style-type: none"> ◆ equals ◆ is present ◆ does not equal ◆ is not present
Group (item category: Members)	<ul style="list-style-type: none"> ◆ equals ◆ is present ◆ does not equal ◆ is not present
Time (in date-time or date-only format)	◆ equals
Number (integer)	<ul style="list-style-type: none"> ◆ greater than ◆ greater than or equal to ◆ less than ◆ less than or equal to ◆ is present ◆ does not equal ◆ not greater than ◆ not greater than or equal to ◆ not less than ◆ not less than or equal to ◆ is not present

6.3.2 Specifying a Value for Your Comparison

The type of attribute specified in a criterion also determines how you specify the value for a comparison in that criterion:

Table 6-2 Method of Entering Comparison Value

If the attribute is a	You do this to specify the value
String (text)	Type your text in the text box that displays on the right.
String (text) with a predetermined list of choices	Select a choice from the drop-down list that displays on the right.
User or group (or other object identified by DN)	Use the <i>Lookup</i> , <i>History</i> , and <i>Reset</i> buttons that display on the right.
Time (in date-time or date-only format)	Use the <i>Calendar</i> and <i>Reset</i> buttons that display on the right.
Number (integer)	Type your number in the text box that displays on the right.

If the attribute is a	You do this to specify the value
Boolean (true or false)	Type <code>true</code> or <code>false</code> in the text box that displays on the right.

Don't specify a value when the comparison operation is one of the following:

- ◆ is present
- ◆ is not present

Case in Text

Text searches are not case sensitive. You'll get the same results no matter which case you use in your value. For example, these are all equivalent:

McDonald
mcdonald
MCDONALD

Wildcards in Text

You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character. For example:

Mc*
*Donald
Don
McD*d

Using the Lookup, History, and Reset Buttons

Some search criteria display Lookup, History, and Reset buttons. This section describes how to use these buttons:

Table 6-3 *Lookup, History, and Reset Buttons in Search Criteria*

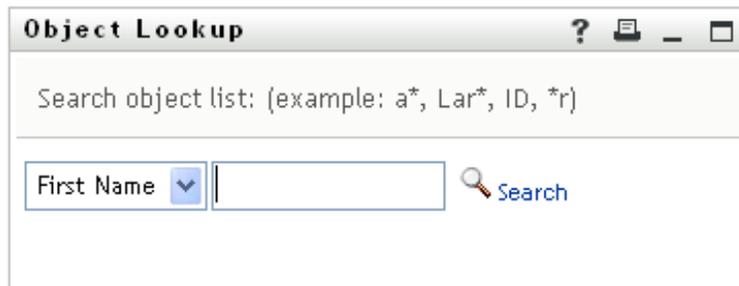
Button	What It Does
	Looks up a value to use for a comparison
	Displays a <i>History</i> list of values used for a comparison
	Resets the value for a comparison

To look up a user:

- 1 Click *Lookup* to the right of an entry (for which you want to look up the user):



The Lookup page displays:



The screenshot shows a window titled "Object Lookup" with a search bar containing the text "Search object list: (example: a*, Lar*, ID, *r)". Below the search bar is a dropdown menu set to "First Name" and an empty text input field. To the right of the input field is a magnifying glass icon and the word "Search".

2 Specify search criteria for the user you want:

2a Use the drop-down list to select a search by *First Name* or *Last Name*.

2b In the text box next to the drop-down list, type all or part of the name to search for.

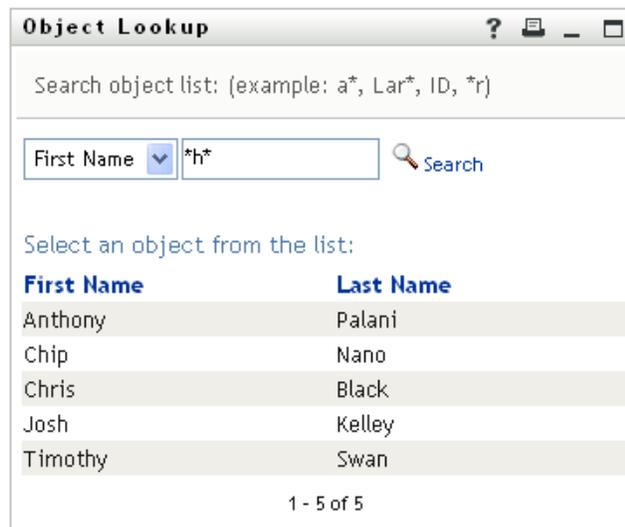
The search finds every name that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

For instance, all of the following examples finds the first name Chip:

Chip
chip
c
c*
*p
h

3 Click *Search*.

The Lookup page displays your search results:



The screenshot shows the "Object Lookup" window with the search criteria "First Name" and "h*" entered. Below the search bar, it says "Select an object from the list:". A table displays the search results:

First Name	Last Name
Anthony	Palani
Chip	Nano
Chris	Black
Josh	Kelley
Timothy	Swan

At the bottom of the window, it says "1 - 5 of 5".

If you see a list of users that includes the one you want, go to **Step 4**. Otherwise, go back to **Step 2**.

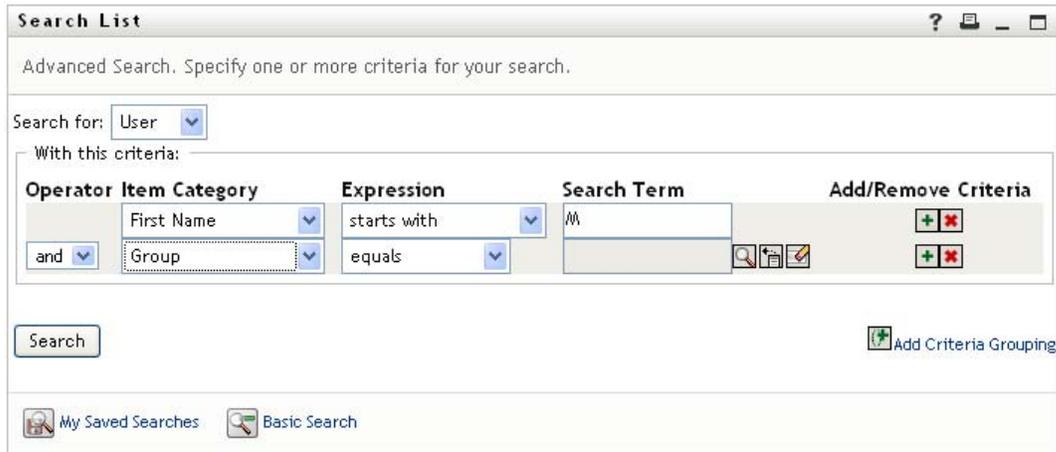
You can sort the search results in ascending or descending order by clicking the column headings.

4 Select the user you want from the list.

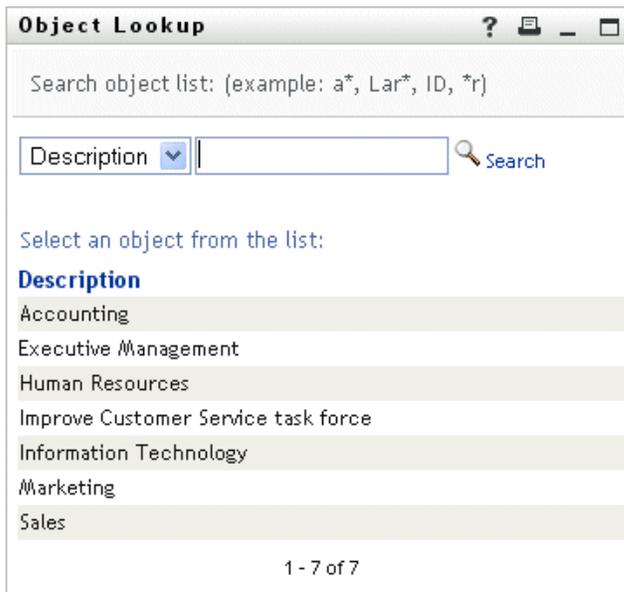
The Lookup page closes and inserts the name of that user into the appropriate entry as the value to use for your comparison.

To look up a group as a search criterion for a user:

1 Add *Group* as a search criterion, then click *Lookup*  to the right of the *Search Term* field:



The Lookup page displays search results:



2 Specify search criteria for the group you want:

2a In the drop-down list, your only choice is to search by *Description*.

2b In the text box next to the drop-down list, type all or part of the description to search for.

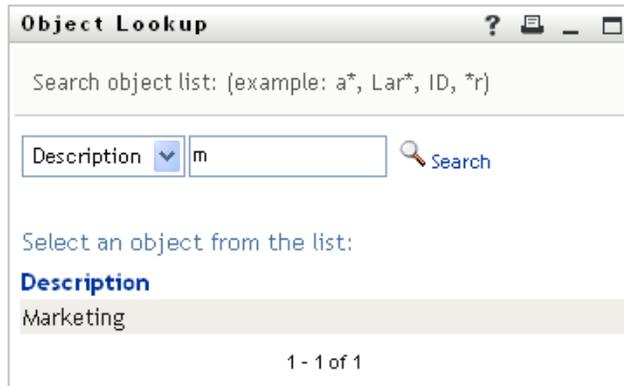
The search finds every description that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

For instance, all of the following examples find the description Marketing:

Marketing
marketing
m
m*
*g
k

3 Click *Search*.

The Lookup page displays your search results:



If you see a list of groups that includes the one you want, go to **Step 4**. Otherwise, go back to **Step 2**.

You can sort the search results in ascending or descending order by clicking the column heading.

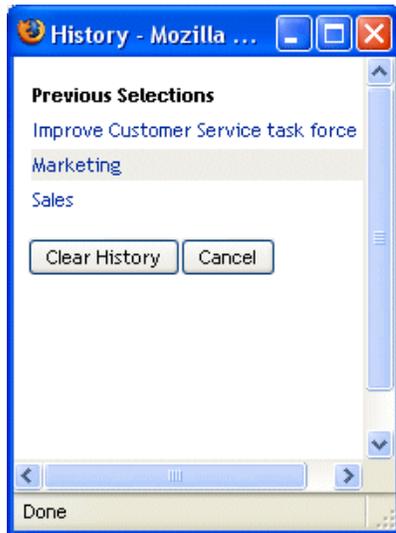
4 Select the group you want from the list.

The Lookup page closes and inserts the description of that group into the appropriate entry as the value to use for your comparison.

To use the *History* list:

1 Click *History*  to the right of an entry (whose previous values you want to see):

The *History* list displays previous values for this criterion in alphabetical order:



2 Do one of the following:

If you want to	Do this
Pick from the <i>History</i> list	Select a value that you want from the list. The <i>History</i> list closes and inserts that value into the appropriate entry as the value to use for your comparison.
Clear the <i>History</i> list	Click <i>Clear History</i> . The <i>History</i> list closes and deletes its values for this entry. Clearing the <i>History</i> list does not change the current value of the entry in your comparison.

6.4 Working with Search Results

This section tells you how to work with the results that display after a successful search:

- ◆ [Section 6.4.1, “About Search Results,” on page 75](#)
- ◆ [Section 6.4.2, “Using the Search List,” on page 77](#)
- ◆ [Section 6.4.3, “Other Actions You Can Perform,” on page 78](#)

6.4.1 About Search Results

The content of your search results depends on the type of search you perform:

- ◆ [“For a User Search” on page 76](#)
- ◆ [“For a Group Search” on page 76](#)

On any search results page, you can select

- ◆ View My Saved Searches

- ◆ Save Search
- ◆ Revise Search
- ◆ Export Results
- ◆ Start a New Search

For a User Search

In the results of a user search, the list of users provides tabs for three views of the information:

- ◆ *Identity* (contact information)
- ◆ *Location* (geographical information)
- ◆ *Organization* (organizational information)

Figure 6-8 User Search Results

Search List

Search Results

Use the tabs below for different views of your result set.

User: (Group equals Marketing or Group equals Sales)
Sorted by: Last Name
Total Matches: 22

Identity Location Organization

First Name	Last Name	Title	Email	Telephone Number
Bill	Bender	Technical Account Manager	✉	(555) 555-1320
Chris	Black	Sales Director, Black	✉	(555) 555-1338
Allison	Blake	Creative Assistant	✉	(555) 555-1222
Jane	Brown	Technical Account Manager	✉	(555) 555-1316
Bill	Burke	Sales Manager, Central	✉	(555) 555-1210
Ken	Carson	Account Executive	✉	(555) 555-1315
Ricardo	Castro	VP, Latin American Sales	✉	(555) 555-1206
Cal	Central	VP, North American Sales	✉	(555) 555-1209
Kevin	Chang	Account Executive	✉	(555) 555-1212
Kevin	Chester	Marketing Assistant	✉	(555) 555-1221

1 - 10 of 22

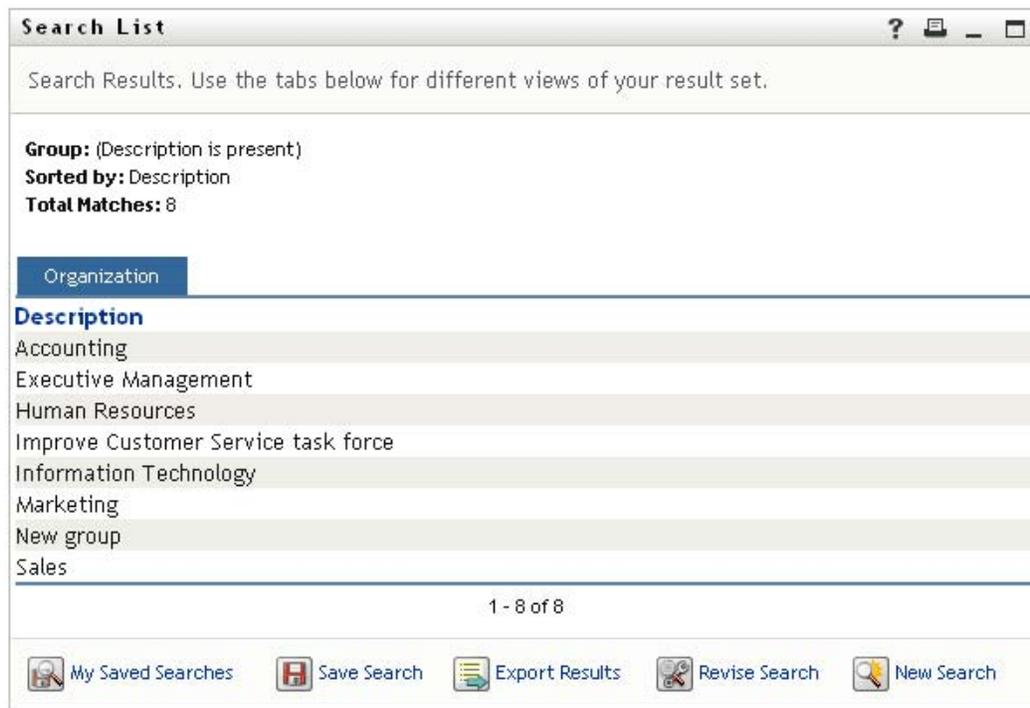
Next Last

My Saved Searches Save Search Export Results Revise Search New Search

For a Group Search

The results of a group search provide only the Organization view of the information:

Figure 6-9 Group Search Results



6.4.2 Using the Search List

You can do the following with the list of rows that displays to represent your results:

- ♦ “To Switch to a Another View” on page 77
- ♦ “To Sort the Rows of Information” on page 77
- ♦ “To Display Details for a User or Group” on page 77
- ♦ “To Send E-Mail to a User in the Search List” on page 78

To Switch to a Another View

- 1 Click the tab for the view you want to display.

To Sort the Rows of Information

- 1 Click the heading of the column that you want to sort.

The initial sort is in ascending order.

- 2 You can toggle between ascending and descending order by clicking the column heading again (as often as you like).

To Display Details for a User or Group

- 1 Click the row for the user or group whose details you want to see (but don’t click directly on an e-mail icon unless you want to send a message instead).

The Profile page displays, showing detailed information about your chosen user or group:



This page is just like the My Profile page on the *Identity Self-Service* tab. The only difference is that, when you are viewing details about another user or group (instead of yourself), you might not be authorized to see some of the data or perform some of the actions on the page. Consult your system administrator for assistance.

To learn about using the features of the Profile page, see [Chapter 5, “Using My Profile,” on page 49](#).

- 2 When you're done with the Profile page, you can close its window.

To Send E-Mail to a User in the Search List

- 1 Find the row of a user to whom you want to send e-mail.
- 2 Click *Send E-Mail*  in that user's row:

A new message is created in your default e-mail client. The message is blank except for the *To* list, which specifies your chosen user as a recipient.

- 3 Fill in the message contents.
- 4 Send the message.

6.4.3 Other Actions You Can Perform

While displaying search results, you can also:

- ♦ [“Save a Search” on page 79](#)
- ♦ [“Export Search Results” on page 79](#)
- ♦ [“Revise Search Criteria” on page 80](#)

Save a Search

To save the current set of search criteria for future reuse:

- 1 Click *Save Search* (at the bottom of the page).
- 2 When prompted, specify a name for this search.

If you're viewing the results of an existing saved search, that search name displays as the default. This enables you to update a saved search with any criteria changes you've made.

Otherwise, if you type a search name that conflicts with the name of an existing saved search, a version number is automatically added to the end of the name when your new search is saved.

- 3 Click *OK* to save the search.

The Search List page displays a list of My Saved Searches.

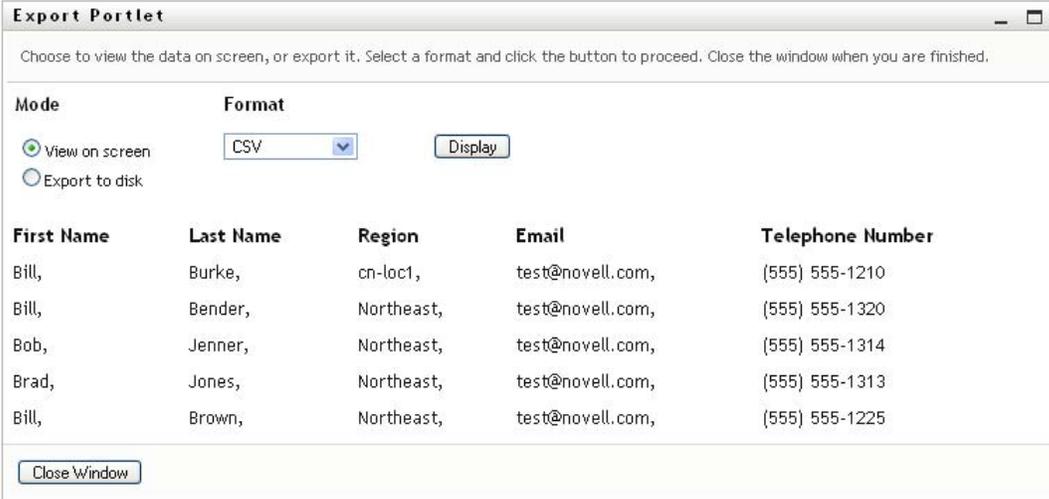
To learn more about working with saved searches, see [Section 6.5, "Using Saved Searches," on page 81](#).

Export Search Results

To export search results to a text file:

- 1 Click *Export Results* (at the bottom of the page).

The Export page displays:



The screenshot shows a window titled "Export Portlet" with a close button. Below the title bar is a text box: "Choose to view the data on screen, or export it. Select a format and click the button to proceed. Close the window when you are finished." Below this are two sections: "Mode" and "Format".

Mode: Two radio buttons are present. "View on screen" is selected (indicated by a green dot), and "Export to disk" is unselected (indicated by a grey dot).

Format: A dropdown menu is set to "CSV". To the right of the dropdown is a "Display" button.

Below the mode and format options is a table of search results:

First Name	Last Name	Region	Email	Telephone Number
Bill,	Burke,	cn-loc1,	test@novell.com,	(555) 555-1210
Bill,	Bender,	Northeast,	test@novell.com,	(555) 555-1320
Bob,	Jenner,	Northeast,	test@novell.com,	(555) 555-1314
Brad,	Jones,	Northeast,	test@novell.com,	(555) 555-1313
Bill,	Brown,	Northeast,	test@novell.com,	(555) 555-1225

At the bottom of the window is a "Close Window" button.

By default, *View on screen* is selected, and *CSV* is chosen in the format drop-down list.

Consequently, the Export page shows your current search results in CSV (Comma Separated Value) format.

- 2 If you want to see what those search results look like in Tab Delimited format instead, select *Tab Delimited* in the drop-down list, then click *Continue*.
- 3 When you're ready to export your current search results to a text file, check *Export to disk*.

The Export page displays:

Export Portlet

Choose to view the data on screen, or export it. Select a format and click the button to proceed. Close the window when you are finished.

Mode **Format**

View on screen

Export to disk

- 4 Use the *Format* drop-down list to select an export format for the search results:

Export Format	Default Name of Generated File
CSV	SearchListResult. <i>date.time</i> .csv For example: SearchListResult.27-Sep-05.11.21.47.csv
Tab Delimited	SearchListResult. <i>date.time</i> .txt For example: SearchListResult.27-Sep-05.11.20.51.txt
XML (available if you are exporting to disk)	SearchListResult. <i>date.time</i> .xml For example: SearchListResult.27-Sep-05.11.22.51.xml

- 5 Click *Export*.
- 6 When prompted, specify where to save the file of exported search results.
- 7 When you're finished exporting, click *Close Window*.

Revise Search Criteria

- 1 Click *Revise Search* (at the bottom of the page).

This returns you to your previous search page to edit your search criteria.

- 2 Make your revisions to the search criteria according to the instructions in these sections:
 - ♦ [Section 6.2, "Performing Basic Searches," on page 66](#)
 - ♦ [Section 6.3, "Performing Advanced Searches," on page 66](#)

6.5 Using Saved Searches

When you go to Directory Search, the My Saved Searches page displays by default. This section describes what you can do with saved searches:

- ♦ [Section 6.5.1, “To List Saved Searches,” on page 81](#)
- ♦ [Section 6.5.2, “To Run a Saved Search,” on page 81](#)
- ♦ [Section 6.5.3, “To Edit a Saved Search,” on page 81](#)
- ♦ [Section 6.5.4, “To Delete a Saved Search,” on page 82](#)

6.5.1 To List Saved Searches

- 1 Click the *My Saved Searches* button at the bottom of a Directory Search page. The My Saved Searches page displays. [Figure 6-10 on page 81](#) shows an example.

Figure 6-10 The My Saved Searches Page



6.5.2 To Run a Saved Search

- 1 In the *My Saved Searches* list, find a saved search that you want to perform.
- 2 Click the name of the saved search (or click the beginning of that row).

Your search results display.

To learn about what to do next, see [Section 6.4, “Working with Search Results,” on page 75](#).

6.5.3 To Edit a Saved Search

- 1 In the *My Saved Searches* list, find a saved search that you want to revise.
- 2 Click *Edit* in the row for that saved search.
This takes you to the search page to edit the search criteria.
- 3 Make your revisions to the search criteria according to the instructions in these sections:
 - ♦ [Section 6.2, “Performing Basic Searches,” on page 66](#)
 - ♦ [Section 6.3, “Performing Advanced Searches,” on page 66](#)
- 4 To save your changes to the search, see [Section 6.4, “Working with Search Results,” on page 75](#).

6.5.4 To Delete a Saved Search

- 1 In the *My Saved Searches* list, find a saved search that you want to delete.
- 2 Click *Delete* in the row for that saved search.
- 3 When prompted, click *OK* to confirm the deletion.

Performing Password Management

7

This section tells you how to use the Password Management pages on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 7.1, “About Password Management,” on page 83](#)
- ◆ [Section 7.2, “Password Challenge Response,” on page 84](#)
- ◆ [Section 7.3, “Password Hint Change,” on page 85](#)
- ◆ [Section 7.4, “Change Password,” on page 86](#)
- ◆ [Section 7.5, “Password Policy Status,” on page 88](#)
- ◆ [Section 7.6, “Password Sync Status,” on page 89](#)

NOTE: This section describes the default features of the Password Management pages. You might encounter some differences because of your job role, your level of authority, and customizations made for your organization; consult your system administrator for details.

For more general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

7.1 About Password Management

You can use the Password Management pages to do any of the functions listed in [Table 7-1](#):

Table 7-1 Password Management Functions

This Password Management page	Enables you to
Password Challenge Response	Set or change either of the following: <ul style="list-style-type: none">◆ Your valid responses to administrator-defined challenge questions◆ User-defined challenge questions and responses
Password Hint Change	Set or change your password hint
Change Password	Change (reset) your password, according to the rules established by your system administrator
Password Policy Status	Review your password policy requirements. You can change requirements marked Valid
Password Sync Status	Display the status of synchronization of application passwords with the Identity Vault

NOTE: Accessing applications prior to completion of synchronization causes application access issues.

7.2 Password Challenge Response

Challenge questions are used to verify your identity during login when you have forgotten your password. If the system administrator has set up a password policy that enables this feature for you, you can use the Password Challenge Response page to:

- ◆ Specify responses that are valid for you when answering administrator-defined questions
- ◆ Specify your own questions and the valid responses for them (if your password policy enables this)

To use the Password Challenge Response page:

- 1 On the *Identity Self-Service* tab, click *Password Challenge Response* in the menu (under *Password Management*).

The Password Challenge Response page displays. For example:



The screenshot shows the Novell Identity Manager interface. The top navigation bar includes 'Novell Identity Manager', 'Welcome Bill', and 'Friday, December 29, 2006'. The main navigation tabs are 'Identity Self-Service', 'Requests & Approvals', 'Logout', and 'Help'. A left sidebar menu is open to 'Password Management', with 'Password Challenge Response' selected. The main content area is titled 'IDM Challenge Response' and contains the following text: 'These questions are assigned to your password policy. For all Admin-Defined Questions, provide a response. For all User-Defined Questions, create your own question and provide a response.' Below this, there are two sections: 'Admin Defined Challenge Questions' and 'User Defined Challenge Questions'. Each section has a 'Question' field, a 'Response' text box, and a 'Use Stored Response?' checkbox. The 'Admin Defined' question is 'What is your childhood pet's name?' and the 'User Defined' question is 'What is my favorite challenge?'. A 'Submit' button is located at the bottom left of the form.

The *Response* text boxes display as blank (even if you have previously defined responses).

- 2 Type an appropriate response in each *Response* text box (they are all required), or use your previously stored response.

Make sure you specify responses that you can remember later.

- 3 Specify or change any user-defined questions that are required. You may not use the same question more than once.
- 4 Click *Submit*.

The status of your request displays. For example:



The screenshot shows a window titled 'IDM Challenge Response'. The main content area displays 'Challenge Response' and a red message: 'Complete: Challenge responses are saved successfully'. Below the message is a blue link labeled 'Change again'.

7.3 Password Hint Change

A password hint is used during login to help you remember your password when you have forgotten it. Use the Password Hint Change page to set or change your password hint.

- 1 On the *Identity Self-Service* tab, click *Password Hint Change* in the menu (under *Password Management*).

The Password Hint Definition page displays:



Novell® Identity Manager

Welcome Bill

Identity Self-Service Requests & Approvals

Information Management

- Organization Chart
- My Profile
- Directory Search

Password Management

- Password Challenge Response
- Password Hint Change**
- Change Password
- Password Policy Status
- Password Sync Status

Define Password Hint

Please enter a password hint to help you remember your password.

Create a Password Hint

Username: cn=bburke,ou=users,ou=idmsample-pamr,o=novell

Password Hint:

Submit

- 2 Type the new text for your hint.
Your password cannot appear within the hint text.
- 3 Click *Submit*.

The status of your request displays. For example:



Novell® Identity Manager

Welcome Bill

Identity Self-Service Requests & Approvals

Information Management

- Organization Chart
- My Profile
- Directory Search

Password Management

- Password Challenge Response
- Password Hint Change**
- Change Password
- Password Policy Status
- Password Sync Status

Define Password Hint

Please enter a password hint to help you remember your password.

Success

Create a Password Hint

Username: cn=bburke,ou=users,ou=idmsample-pamr,o=novell

Password Hint:

Submit

7.4 Change Password

You can use this page whenever you need to change your password (providing that the system administrator has enabled you to do so).

- 1 On the *Identity Self-Service* tab, click *Change Password* in the menu (under *Password Management*).

The Change Password page displays. If the system administrator has set up a password policy for you, the Change Password page typically provides information about how to specify a password that meets the policy's requirements. For example:

Novell® Identity Manager Friday, December 29, 2006

Welcome Bill Identity Self-Service Requests & Approvals

Information Management ⤴

- Organization Chart
- My Profile
- Directory Search

Password Management ⤴

- Password Challenge Response
- Password Hint Change
- Change Password**
- Password Policy Status
- Password Sync Status

Change Password

Your password must have the following properties:

You may use numbers in your password.

The password is case-sensitive.

You may use special characters in your password.

- Minimum number of characters in password: 4
- Maximum number of characters in password: 12

Old password:

New password:

Retype password:

If no password policy applies, you'll see the basic Change Password page:

Novell® Identity Manager

Welcome Allison

Identity Self-Service Requests & Approvals

Information Management

- Organization Chart
- My Profile
- Directory Search

Password Management

- Password Challenge Response
- Password Hint Change
- Change Password**
- Password Policy Status
- Password Sync Status

Change Password

Old password:

New password:

Retype password:

- 2 Type your current password in the *Old password* text box.
- 3 Type your new password in the *New password* text box.
- 4 Type your new password again in the *Retype password* text box.
- 5 Click *Submit*.
- 6 You might be prompted to supply a password hint, if your administrator configured your security policy to do so. If so, see [Section 7.3, “Password Hint Change,”](#) on page 85.
- 7 The status of your request is displayed. For example:

Novell® Identity Manager

Welcome Allison

Identity Self-Service Requests & Approvals

Information Management

- Organization Chart
- My Profile
- Directory Search

Password Management

- Password Challenge Response
- Password Hint Change
- Change Password**
- Password Policy Status
- Password Sync Status

Change Password

Password Changed

Old password:

New password:

Retype password:

7.5 Password Policy Status

You are assigned a password policy by your administrator. The policy determines the security measures associated with your password. You can check your password policy requirements as follows:

- 1 On the *Identity Self-Service* tab, click *Password Policy Status* in the menu (under *Password Management*).

The *Password Policy Status* page displays. For example:



Items labeled invalid are items that you cannot change.

7.6 Password Sync Status

Use the Password Sync Status page to determine if your password has been synchronized across applications. Access another application only after your password has synchronized. Accessing applications prior to completion of synchronization causes application access issues.

- 1 On the *Identity Self-Service* tab, click *Password Sync Status* in the menu (under *Password Management*).

The *Password Sync Status* page displays. Full-color icons indicate applications for which the password is synchronized. Dimmed icons indicate applications that are not yet synchronized. For example:

The screenshot shows the Novell Identity Manager interface. The top navigation bar includes 'Welcome Marvin', 'Identity Self-Service', 'Requests & Approvals', 'Logout', and 'Help'. The date 'Wednesday, January 10, 2007' is displayed in the top right. A left-hand menu is open to 'Password Management', with 'Password Sync Status' selected. The main content area is titled 'Check Password Synchronization Status' and displays a table of application synchronization results:

Application	Status
Active Directory	Success
eDir to madean5_tree	Success
eDir to fabio108_tree	Check count exceeded.
Null Driver	Success
Delimited Text	Warning

At the bottom of the main content area, a message reads: 'Application synchronization status check completed with errors.'

Creating Users or Groups

8

This section tells you how to use the Create User or Group page on the *Identity Self-Service* tab of the Identity Manager User Application. Topics include:

- ◆ [Section 8.1, “About Creating Users or Groups,” on page 91](#)
- ◆ [Section 8.2, “Creating a User,” on page 91](#)
- ◆ [Section 8.3, “Creating a Group,” on page 94](#)
- ◆ [Section 8.4, “Using the Editing Buttons,” on page 95](#)

For general information about accessing and working with the *Identity Self-Service* tab, see [Chapter 2, “Introducing the Identity Self-Service Tab,” on page 25](#).

8.1 About Creating Users or Groups

System administrators can use the Create User or Group page to create users and groups. The system administrator can give others (typically, selected people in administration or management positions) access to this page.

You might encounter some differences from functions documented in this section because of your job role, your level of authority, and customizations made for your organization. Consult your system administrator for details.

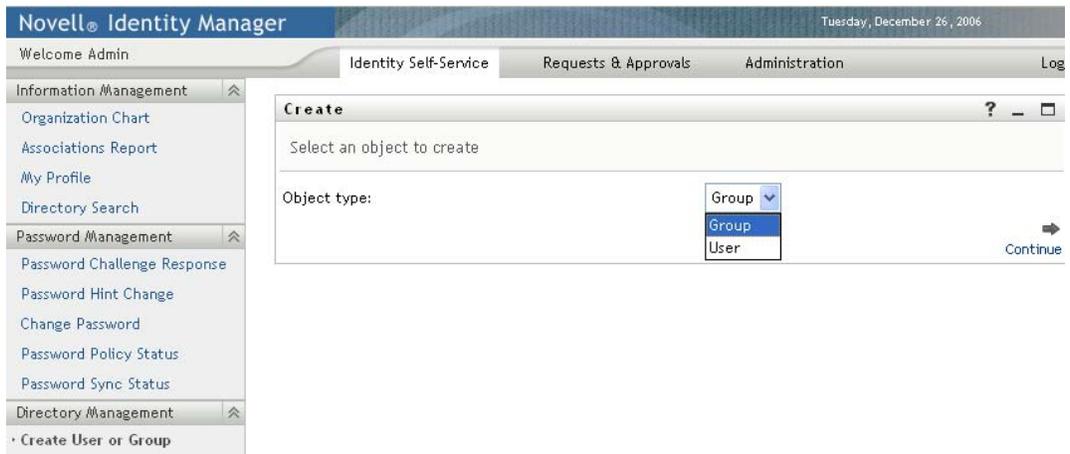
Details on enabling access to the Create User or Group page are in the “Page Administration” section of the *Identity Manager User Application: Administration Guide* (<http://www.novell.com/documentation/idm35/index.html>). To enable access, open iManager, add the user as a Trustee, and add the Assigned Right called Create to the Trustee.

To check which users or groups already exist, use the Directory Search page. See [Chapter 6, “Using Directory Search,” on page 63](#).

8.2 Creating a User

- 1 On the *Identity Self-Service* tab, click *Create User or Group* in the menu (under *Directory Management*, if displayed).

The *Select an object to create* panel displays.



2 Use the *Object type* drop-down list to select *User*, then click *Continue*.

The *User - Set Attributes* panel displays:

The screenshot shows the 'User - Set Attributes' panel. At the top, it says 'User - Set Attributes' and '* - indicates required.'. Below this, there are several input fields with labels: 'User Id:*', 'Container:*', 'First Name:*', 'Last Name:*', 'Title:', 'Department:', 'Region:', 'Email:', 'Manager:', and 'Telephone Number:'. Each field has a text input box and a small green '+' icon to its right. The 'Manager:' field has a blue dropdown arrow, a search icon, a refresh icon, and a red 'X' icon. At the bottom left, there is a 'Back' button with a left-pointing arrow. At the bottom right, there is a 'Continue' button with a right-pointing arrow.

3 Specify values for the following required attributes:

Attribute	What to Specify
User ID	The username for this new user.
Container	<p>An organizational unit in the Identity Vault under which you want the new user stored (such as an OU named users). For example: <code>ou=users,ou=MyUnit,o=MyOrg</code></p> <p>To learn about using the buttons provided to specify a container, see Section 8.4, “Using the Editing Buttons,” on page 95.</p> <p>You won't be prompted for Container if the system administrator has established a default create container for this type of object.</p>
First Name	First name of the user.
Last Name	Last name of the user.

- Specify optional details about this new user, such as Title, Department, Region, E-mail, Manager, or Telephone Number.

To learn about using the buttons provided to specify values for certain attributes, see [Section 8.2, “Creating a User,” on page 91](#).

- Click *Continue*.

The *Create Password* panel displays:

If a password policy is in effect for the target container, this panel provides information about how to specify a password that meets the policy's requirements. The password is also validated against that policy.

- Type a password for the new user in the *Password* and *Confirm Password* text boxes, then click *Continue*.

This sets the new user's initial password. When that user first logs in, the Identity Manager User Application prompts the user to change this password.

The user and password are created, then the *Review* panel displays to summarize the result:

The *Review* panel provides optional links that you might find handy:

- ♦ Click the new user's name to display the Profile page of detailed information for this user. From the Profile page, you can edit the user's details to make changes or delete the user.
- ♦ Click *Create Another* to return to the initial panel of the Create User or Group page

8.3 Creating a Group

- 1 On the *Identity Self-Service* tab, click *Create User or Group* in the menu (under *Directory Management*, if displayed).

The *Select an object to create* panel displays.

- 2 Use the *Object type* drop-down list to select *Group*, then click *Continue*.

The *Set attributes for this Group* panel displays:



- 3 Specify values for the following required attributes:

Attribute	What to Specify
Group ID	The group name for this new group.
Container	An organizational unit in the identity vault under which you want the new group stored (such as an OU named groups). For example: ou=groups, ou=MyUnit, o=MyOrg To learn about using the buttons provided to specify a container, see Section 8.2, "Creating a User," on page 91 .
Description	A description of this new group.

- 4 Click *Continue*.

The group is created, then the *Review* panel displays to summarize the result:



The *Review* panel provides optional links that you might find handy:

- ♦ Click the new group's name to display the Profile page of detailed information for this group
From the Profile page, you can edit the group's details to make changes or delete the group.
- ♦ Click *Create Another* to return to the initial panel of the Create User or Group page

8.4 Using the Editing Buttons

Table 8-1 lists the editing buttons you can use to specify values for attributes.

Table 8-1 *Editing Buttons for Specifying Users and Groups*

Button	What It Does
	Looks up a value to use in an entry
	Displays a <i>History</i> list of values used in an entry
	Resets the value of a selected entry
	Adds a new entry. You can add more than one entry.
	Indicates that more than one entry exists.
	Deletes a selected entry and its value

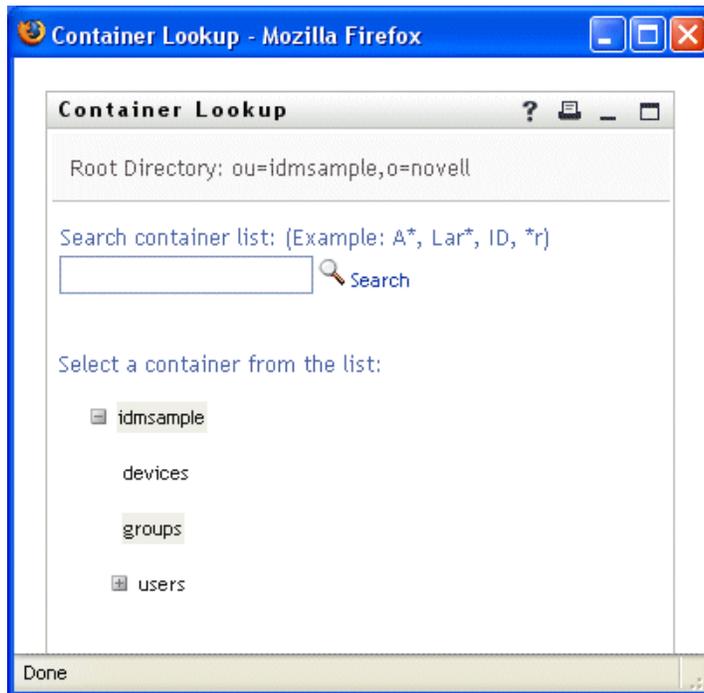
IMPORTANT: It is possible to use the Edit User page of the *Identity Self-Service* tab to break the hierarchical reporting structure. For example, you can add a direct report to a manager even if the direct report has another manager assigned, or you can have a manager report to a person in his or her own organization.

8.4.1 To Look Up a Container

- 1 Click *Lookup* to the right of an entry for which you want to look up a container:



The Lookup page displays a tree of containers:



You can expand or collapse the nodes in this tree (by clicking the + or - buttons) to look for the container you want.

- 2 If necessary, specify search criteria for the container you want.

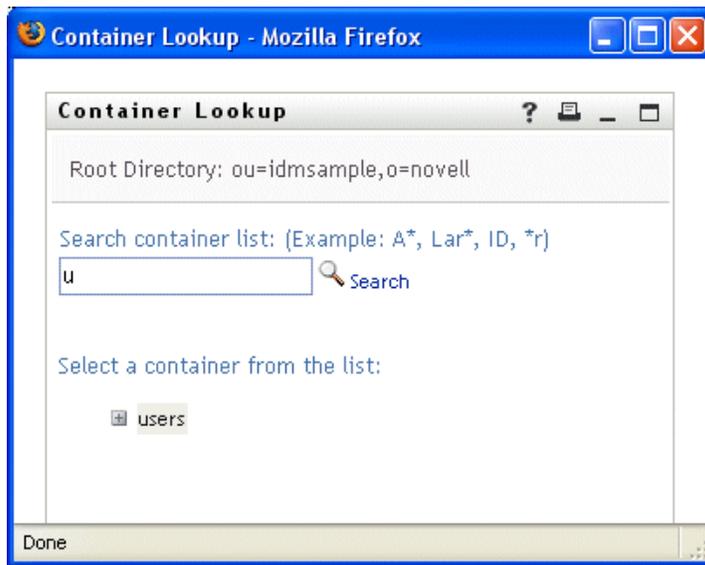
In the text box, type all or part of the container name to search for. The search finds every container name that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

For instance, all of the following examples find the container named users:

```
Users  
users  
u  
u*  
*s  
*r*
```

- 3 Click *Search*.

The Lookup page displays your search results:



- 4 Select the container you want from the tree.

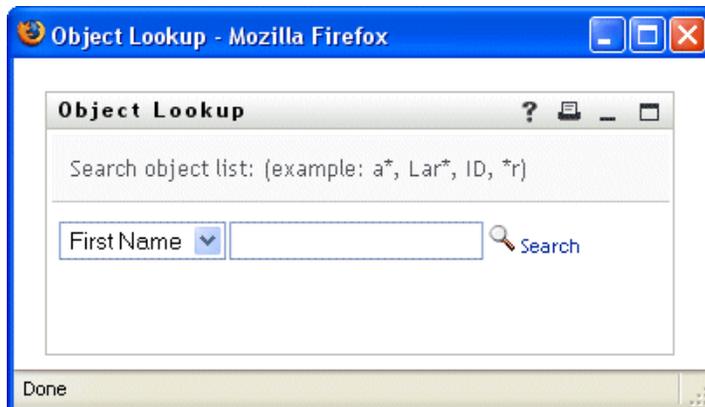
The Lookup page closes and inserts the name of that container into the appropriate entry.

8.4.2 To Look Up a User

- 1 Click *Lookup* to the right of an entry (for which you want to look up a user):



The Lookup page displays:



- 2 Specify search criteria for the user you want:

2a Use the drop-down list to select a search by *First Name* or *Last Name*.

2b In the text box next to the drop-down list, type all or part of the name to search for.

The search finds every name that begins with the text you type. It is not case sensitive. You can optionally use the asterisk (*) as a wildcard in your text to represent zero or more of any character.

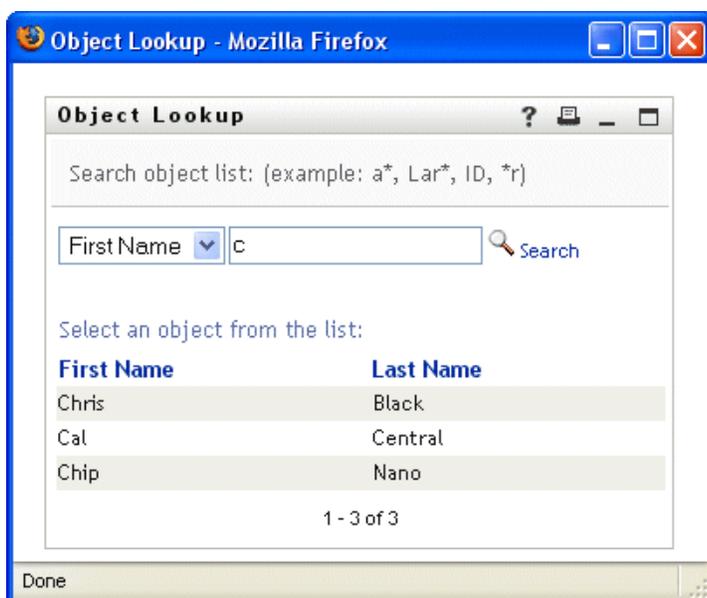
For instance, all of the following examples find the first name Chip:

Chip
chip
c
c*
*p
h

A manager lookup searches only for users who are managers.

3 Click *Search*.

The Lookup page displays your search results:



If you see a list of users that includes the one you want, go to **Step 4**. Otherwise, go back to **Step 2**.

You can sort the search results in ascending or descending order by clicking the column headings.

4 Select the user you want from the list.

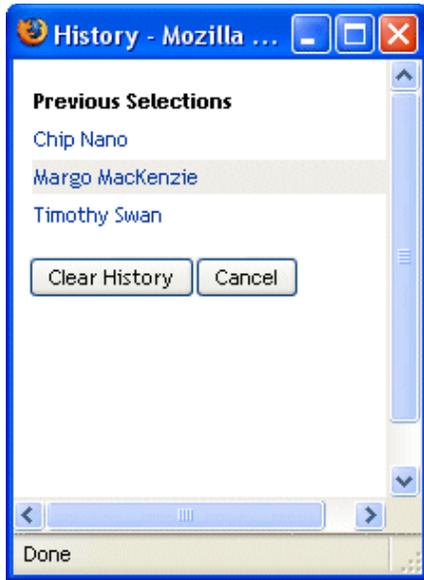
The Lookup page closes and inserts the name of that user into the appropriate entry.

8.4.3 To Use the History List

1 Click *History* to the right of an entry (whose previous values you want to see):



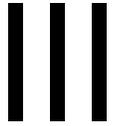
The *History* list displays, with values in alphabetical order:



2 Do one of the following:

If you want to	Do this
Pick from the <i>History</i> list	Select a value that you want from the list. The <i>History</i> list closes and inserts that value into the appropriate entry.
Clear the <i>History</i> list	Click <i>Clear History</i> . The <i>History</i> list closes and deletes its values for this entry. Clearing the <i>History</i> list does not change the current value of the entry.

Using the Requests & Approvals Tab



These sections tell you how to use the *Requests & Approvals* tab of the Identity Manager User Application.

- ◆ [Chapter 9, “Introducing the Requests & Approvals Tab,” on page 103](#)
- ◆ [Chapter 10, “Managing Your Work,” on page 113](#)
- ◆ [Chapter 11, “Configuring Your Provisioning Settings,” on page 133](#)
- ◆ [Chapter 12, “Managing Your Team’s Work,” on page 151](#)
- ◆ [Chapter 13, “Configuring Your Team’s Provisioning Settings,” on page 181](#)

Introducing the Requests & Approvals Tab

This section provides an overview of the *Requests & Approvals* tab. Topics include:

- ◆ Section 9.1, “About the Requests & Approvals Tab,” on page 103
- ◆ Section 9.2, “Accessing the Requests & Approvals Tab,” on page 104
- ◆ Section 9.3, “Exploring the Tab’s Features,” on page 104
- ◆ Section 9.4, “Requests & Approvals Actions You Can Perform,” on page 106
- ◆ Section 9.5, “Understanding the Requests & Approvals Legend,” on page 108

For more general information about accessing and working with the Identity Manager user interface, see Chapter 1, “Getting Started,” on page 13.

9.1 About the Requests & Approvals Tab

The purpose of the *Requests & Approvals* tab is to give you a convenient way to perform workflow-based provisioning actions. These actions allow you to manage user access to secure resources in your organization. These resources can include digital entities such as user accounts, computers, and databases. For example, you might use the *Requests & Approvals* tab to:

- ◆ Make provisioning requests for yourself or your team
- ◆ Manage provisioning work (tasks and resource requests) for yourself or your team
- ◆ Configure provisioning settings for yourself or your team

When a provisioning request requires permission from one or more individuals in an organization, the request starts a workflow. The workflow coordinates the approvals needed to fulfill the request. Some resource requests require approval from a single individual; others require approval from several individuals. In some instances, a request can be fulfilled without any approvals.

When a provisioning request is initiated, the Provisioning System tracks the initiator and the recipient. The initiator is the person who made the request. The recipient is the person for whom the request was made.

Your workflow designer and system administrator are responsible for setting up the contents of the *Requests & Approvals* tab for you and the others in your organization. The flow of control for a provisioning workflow, as well as the appearance of forms, can vary depending on how the provisioning request was defined in the Designer for Identity Manager. In addition, what you can see and do is typically determined by your job requirements and your level of authority.

For details on customizing the design of a provisioning workflow, see the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>). For details on workflow administration, see the *Identity Manager User Application: Administration Guide* (<http://www.novell.com/documentation/idm35/index.html>).

NOTE: The *Requests & Approvals* tab is available only if you have the Provisioning Module for Identity Manager.

9.2 Accessing the Requests & Approvals Tab

By default, after you have logged in to the Identity Manager user interface, the *Requests & Approvals* tab opens and displays the My Tasks page:

The screenshot shows the Novell Identity Manager user interface. The header includes the text "Novell Identity Manager" and "Thursday, January 11, 2007". Below the header, there is a navigation bar with tabs for "Identity Self-Service", "Requests & Approvals", and "Administration". The "Requests & Approvals" tab is selected. On the left side, there is a navigation menu with categories: "My Work", "My Tasks", "My Settings", "My Team's Work", and "My Team's Settings". The "My Tasks" category is expanded, showing a list of tasks. The main content area displays a table with the following data:

Task	Resource	Recipient	Type	Claimed	Timeout	Priority
Manager Approval	Enable Active Directory Account	Allison Blake			1 Days 23 Hours 59 Minutes	

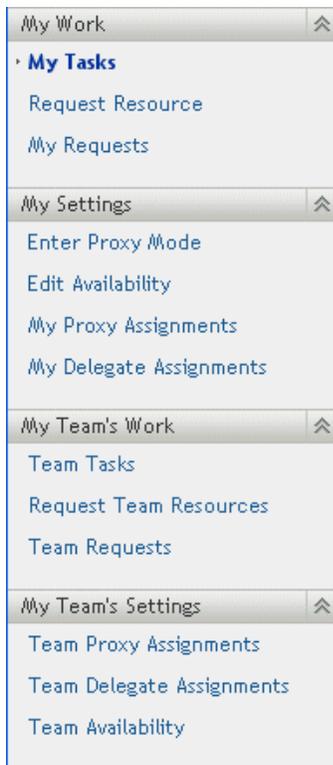
Below the table, there is a "Refresh" button and a pagination indicator "1 - 1 of 1".

If you go to another tab in the Identity Manager user interface but then want to return, you just need to click the *Requests & Approvals* tab to open it again.

9.3 Exploring the Tab's Features

This section describes the default features of the *Requests & Approvals* tab. (Your tab might look different because of customizations made for your organization; consult your system administrator or workflow designer.)

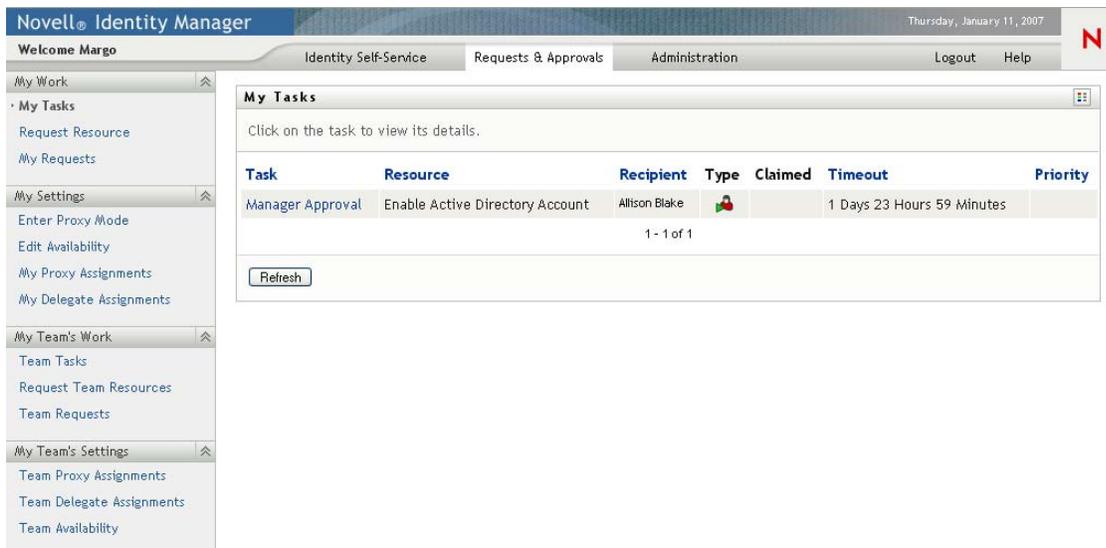
The left side of the *Requests & Approvals* tab displays a menu of actions you can perform. The actions are listed by category (*My Work*, *My Settings*, *My Team's Work*, and *My Team's Settings*):



The *My Team's Work* and *My Team's Settings* actions are only displayed if you are a team manager.

When you click an action, it displays a corresponding page on the right. The page typically contains a window that shows the details for that action. For example, it might display a list or a form where you can enter data or make a selection, as shown below:

Figure 9-1 Page Displayed for an Action



Most pages you work with on the *Requests & Approvals* tab include a button in the upper right corner that lets you display the *Requests & Approvals* legend:



For details on the *Requests & Approvals* legend, see [Section 9.5, “Understanding the Requests & Approvals Legend,”](#) on page 108.

9.4 Requests & Approvals Actions You Can Perform

Here’s a summary of the actions that are available to you by default on the *Requests & Approvals* tab:

Table 9-1 *Requests & Approvals Actions*

Category	Action	Description
My Work	My Tasks	<p>Displays the approval tasks currently assigned to you in your workflow queue.</p> <p>If a task requires a digital signature, the My Tasks action provides a way to approve or disapprove the task with a digital signature.</p> <hr/> <p>WARNING: You must use Novell Audit to preserve documents that you digitally sign. Digital signature documents are not stored in the workflow database.</p> <hr/> <p>If a task is assigned to multiple addressees, the My Tasks action provides a way to see the approval requirements for the task, as well as the list of addressees and the approval status.</p> <p>For details, see Chapter 10, “Managing Your Work,” on page 113.</p>
	Request Resource	<p>Lets you make a request for a resource.</p> <p>If a resource requires a digital signature, the Request Resource action provides a way to associate a digital signature with the request.</p> <p>For details, see Chapter 10, “Managing Your Work,” on page 113.</p>
	My Requests	<p>Displays the status of the resource requests made by or for you. The list of requests therefore includes those for which you are the initiator or the recipient for a request that authorizes view privileges for recipients.</p> <p>For details, see Chapter 10, “Managing Your Work,” on page 113.</p>

Category	Action	Description
My Settings	Enter Proxy Mode	Lets you act as a proxy for another user. For details, see Chapter 11, “Configuring Your Provisioning Settings,” on page 133.
	Edit Availability	Lets you specify which resource requests you are available to act on, and which resource requests your assigned delegates can act on. For details, see Chapter 11, “Configuring Your Provisioning Settings,” on page 133.
	My Proxy Assignments	Lets you view or edit your proxy assignments. To edit proxy assignments, you must have the necessary authority. For details, see Chapter 11, “Configuring Your Provisioning Settings,” on page 133.
	My Delegate Assignments	Lets you view or edit your delegate assignments. To edit delegate assignments, you must have the necessary authority. For details, see Chapter 11, “Configuring Your Provisioning Settings,” on page 133.
My Team’s Work	Team Tasks	Displays the approval tasks assigned to members of your team. Depending on the rights defined for the team, this action can also allow you to claim and/or reassign tasks. If a task requires a digital signature, the Team Tasks action provides a way to approve or disapprove the task with a digital signature. If a task is assigned to multiple addressees, the Team Tasks action provides a way to see the approval requirements for the task, as well as the list of addressees. For details, see Chapter 12, “Managing Your Team’s Work,” on page 151.
	Request Team Resource	Lets you make a request for a resource for a member of your team. If a resource requires a digital signature, the Request Team Resource action provides a way to associate a digital signature with the request. For details, see Chapter 12, “Managing Your Team’s Work,” on page 151.
	Team Requests	Displays the status of resource requests made by or for members of your team. For details, see Chapter 12, “Managing Your Team’s Work,” on page 151.

Category	Action	Description
My Team's Settings	Team Proxy Assignments	<p>Lets you specify proxy assignments for members of your team.</p> <p>This capability must be enabled in the team definition. When this capability is disabled, this action is not allowed.</p> <p>For details, see Chapter 13, "Configuring Your Team's Provisioning Settings," on page 181.</p>
	Team Delegate Assignments	<p>Lets you specify delegate assignments for members of your team.</p> <p>This capability must be enabled in the team rights definition. If the team rights allow managers to make a team member a delegate for other team member's provisioning requests, this action is allowed for these requests. When this capability is disabled in the team rights definition, this action is not allowed.</p> <p>For details, see Chapter 13, "Configuring Your Team's Provisioning Settings," on page 181.</p>
	Team Availability	<p>Lets you specify which resource requests your team members are available to act on, and which resource requests the team member's delegates can act on.</p> <p>This capability must be enabled in the team definition. When this capability is disabled, this action is not allowed.</p> <p>For details, see Chapter 13, "Configuring Your Team's Provisioning Settings," on page 181.</p>

9.5 Understanding the Requests & Approvals Legend

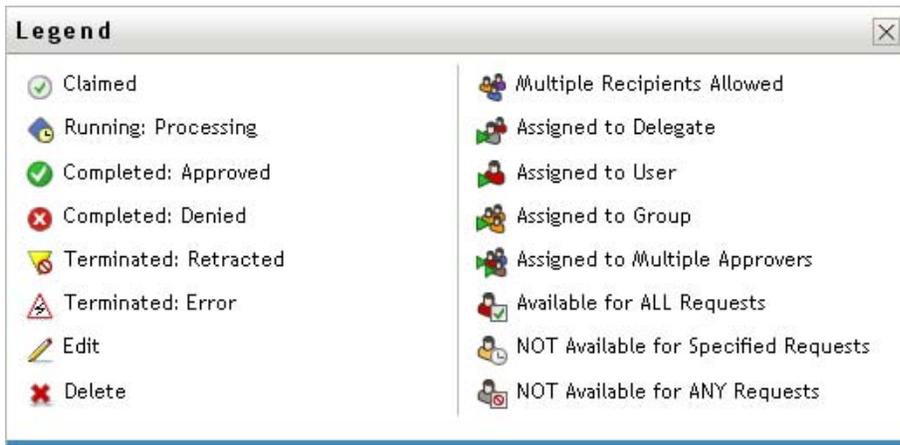
Most pages you work with on the *Requests & Approvals* tab include a button in the upper right corner that lets you display the *Requests & Approvals* legend. To display the legend, click the Legend button, shown in [Figure 9-2](#):

Figure 9-2 *The Legend Button*



The legend provides a brief description of the icons used throughout the *Requests & Approvals* tab. [Figure 9-3 on page 109](#) shows the legend.

Figure 9-3 *The Requests & Approvals Legend*



The table below provides detailed descriptions of the icons in the legend:

Table 9-2 *Legend Icons*

Icon	Description
<i>Claimed</i>	Indicates whether a particular workflow task has been claimed by a user. Appears on the My Tasks page.
<i>Running: Processing</i>	Indicates that a particular resource request is still in process. Appears on the My Requests and Team Requests pages.
<i>Completed: Approved</i>	Indicates that a particular resource request has completed its processing and has been approved. Appears on the My Requests and Team Requests pages.
<i>Completed: Denied</i>	Indicates that a particular resource request has completed its processing and has been denied. Appears on the My Requests and Team Requests pages.
<i>Terminated: Retracted</i>	Indicates that a particular resource request was retracted by a user (either the user who submitted the request, a team manager, or the Provisioning Application Administrator). Appears on the My Requests and Team Requests pages.
<i>Terminated: Error</i>	Indicates that a particular resource request was terminated because of an error. Appears on the My Requests and Team Requests pages.
<i>Edit</i>	Lets you edit a proxy or delegate assignment. To edit the assignment, select it and click the <i>Edit</i> icon. Appears on the My Proxy Assignments, My Delegate Assignments, Team Proxy Assignments, Team Delegate Assignments, Edit Availability, and Team Availability pages.

Icon	Description
<i>Delete</i>	<p>Lets you delete a proxy or delegate assignment. To delete the assignment, select it and click the <i>Delete</i> icon.</p> <p>Appears on the My Proxy Assignments, My Delegate Assignments, Team Proxy Assignments, Team Delegate Assignments, Edit Availability, and Team Availability pages.</p>
<i>Multiple Recipients Allowed</i>	<p>Indicates that this resource provides support for multiple recipients. When a resource supports multiple recipients, the <i>Request Team Resources</i> action lets you select multiple users as recipients.</p> <p>Appears on the Request Team Resources page.</p>
<i>Assigned to Delegate</i>	<p>Indicates that a particular workflow task has been delegated by another user. This task appears in the current user's queue because the original assignee has declared himself or herself unavailable. Because the current user is the original assignee's delegate, this user sees the task.</p> <p>Appears on the My Tasks and Team Tasks pages.</p>
<i>Assigned to User</i>	<p>Indicates that a particular workflow task was assigned to a user.</p> <p>Appears on the My Tasks and Team Tasks pages.</p>
<i>Assigned to Group</i>	<p>Indicates that a particular workflow task was assigned to a group.</p> <p>Appears on the My Tasks and Team Tasks pages.</p>
<i>Assigned to Multiple Approvers</i>	<p>Indicates that a particular workflow task was assigned to more than one user.</p> <p>This icon applies in the following situations:</p> <ul style="list-style-type: none"> ◆ The task has been assigned to a group of addressees, but only one addressee can claim and approve the task. When this approval is given, task execution is considered finished. ◆ The task has been assigned to multiple addressees, and all of them must claim and approve the task before the activity can be considered complete. ◆ The task has been assigned to multiple addressees, and a quorum of users must claim and approve the task before the activity can be considered complete. The definition of a quorum is configured by the administrator. To define the quorum, the administrator specifies an approval condition that specifies the precise number of approvals or the percentage of approvals needed. <p>Appears on the My Tasks and Team Tasks pages.</p>
<i>Available for ALL Requests</i>	<p>Indicates that a particular user is available for all kinds of resource requests. This setting applies to delegation.</p> <p>Appears on the Edit Availability and Team Availability pages.</p>

Icon	Description
<i>NOT Available for Specified Requests</i>	<p>Indicates that a particular user is not available for certain kinds of resource requests during a particular period. This setting applies to delegation. During the time period when a particular user is unavailable for these requests, the user delegated to act on these requests can work on them.</p> <p>Appears on the Edit Availability and Team Availability pages.</p>
<i>NOT Available for ANY Requests</i>	<p>Indicates that a particular user is not available for any resource requests currently in the system. This setting applies to delegation. During the time period when a particular user is unavailable for a request, the user delegated to act on that request can work on it.</p> <p>Appears on the Edit Availability and Team Availability pages.</p>

This section provides instructions for managing your provisioning work. Topics include:

- ♦ [Section 10.1, “About the My Work Actions,” on page 113](#)
- ♦ [Section 10.2, “Managing Your Tasks,” on page 113](#)
- ♦ [Section 10.3, “Requesting a Resource,” on page 122](#)
- ♦ [Section 10.4, “Checking the Status of Your Requests,” on page 129](#)

10.1 About the My Work Actions

The *Requests & Approvals* tab in the Identity Manager user application includes a group of actions called *My Work*. The *My Work* actions give you the ability to make resource requests, check the status of requests you’ve made, and perform tasks that have been assigned to you or to a group to which you belong.

The *My Work* actions also let you perform tasks as a delegate for another user. A delegated task appears in your queue when the original assignee for the task has declared himself or herself to be unavailable and has designated you as a delegate.

NOTE: The flow of control for a provisioning workflow, as well as the appearance of forms, can vary depending on how the provisioning request was defined in the Designer for Identity Manager. For details on customizing the design of a provisioning workflow, see the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>).

10.2 Managing Your Tasks

The *My Tasks* action lets you check your workflow queue for tasks that have been assigned to you. When a task is in your queue, you need to perform one of the following actions:

- ♦ Claim the task so you begin working on it
- ♦ Reassign the task to another user

NOTE: You must have the appropriate authority to reassign tasks. To reassign a task, you must be a Provisioning Application Administrator or a Team Manager who has been given this permission in the team rights definition.

When you’ve claimed a task to work on, you have the ability to take an action that forwards the workitem to the next activity within the workflow. The actions you can perform on a claimed task are described below:

Table 10-1 Forward Actions

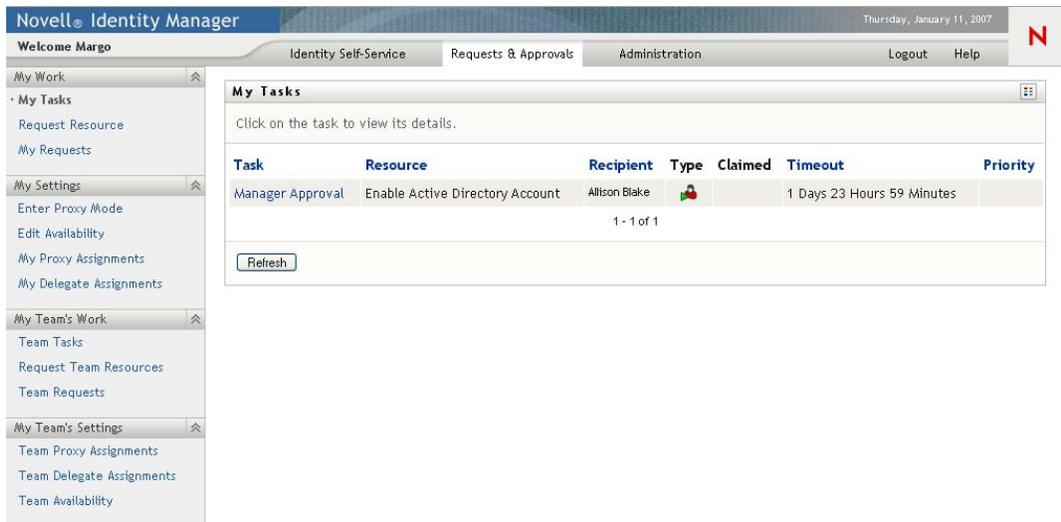
Forward Action	Description
Approve	Allows you to give your approval to the task. When you approve the task, the workitem is forwarded to the next activity in the workflow.
Deny	Allows you to explicitly deny your approval to the task. When you deny the task, the workitem is forwarded to the next activity in the workflow and the request is denied. Typically, the workflow process terminates when a request is denied.
Refuse	Allows you to explicitly refuse the task. When you refuse the task, the workitem is forwarded to the next activity for the refused action in the workflow.

10.2.1 Viewing Your Tasks

To see the tasks that have been assigned to you:

- 1 Click *My Tasks* in the *My Work* group of actions.

The list of tasks in your queue is displayed.



The *Type* column in the task list includes an icon that indicates whether the task is currently assigned to a user, group, delegate, or to multiple approvers. The type *Assigned to Multiple Approvers* applies in the following situations:

- ♦ The task has been assigned to a group of addressees, but only one addressee can claim and approve the task. After this approval is given, task execution is considered complete.
- ♦ The task has been assigned to multiple addressees, and all of them must claim and approve the task before the activity can be considered complete.
- ♦ The task has been assigned to multiple addressees, and a quorum of users must claim and approve the task before the activity can be considered complete. The definition of a quorum is configured by the administrator. To define the quorum, the administrator specifies an approval condition that specifies the precise number of approvals or the percentage of approvals needed.

The workflow system performs *short circuit evaluation* to optimize quorums. Whenever a quorum approval condition reaches the point where a quorum is not possible, the activity is denied and the task is removed from the queues of all addressees.

The *Priority* column shows a flag for the high priority tasks. You can sort the list of tasks by priority by clicking the *Priority* column.

10.2.2 Selecting a Task

To select a task in the queue list:

- 1 Click the name of the task in the queue.

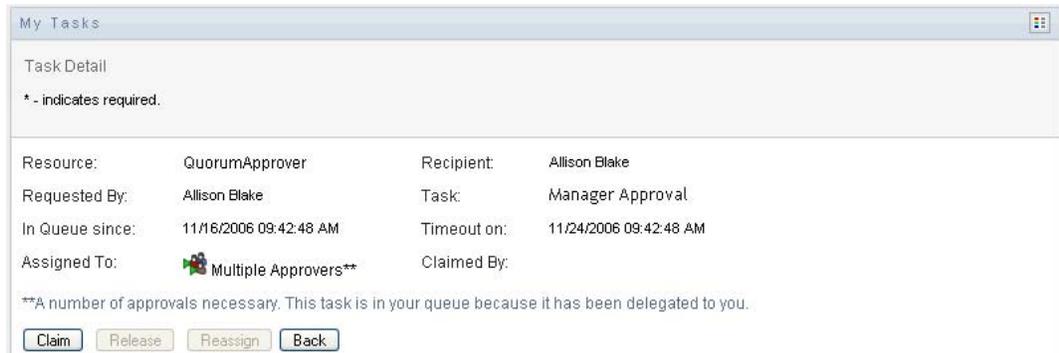
The screenshot shows the 'My Tasks' section of the Novell Identity Manager interface. The page title is 'Novell Identity Manager' and the date is 'Thursday, January 11, 2007'. The user is 'Welcome Margo'. The navigation tabs are 'Identity Self-Service', 'Requests & Approvals', and 'Administration'. The left sidebar contains various menu items under 'My Work', 'My Settings', 'My Team's Work', and 'My Team's Settings'. The main content area shows a 'My Tasks' section with a table of tasks. The table has columns: Task, Resource, Recipient, Type, Claimed, Timeout, and Priority. One task is listed: 'Manager Approval' with Resource 'Enable Active Directory Account', Recipient 'Allison Blake', and Timeout '1 Days 23 Hours 59 Minutes'. A 'Refresh' button is located below the table.

Task	Resource	Recipient	Type	Claimed	Timeout	Priority
Manager Approval	Enable Active Directory Account	Allison Blake			1 Days 23 Hours 59 Minutes	

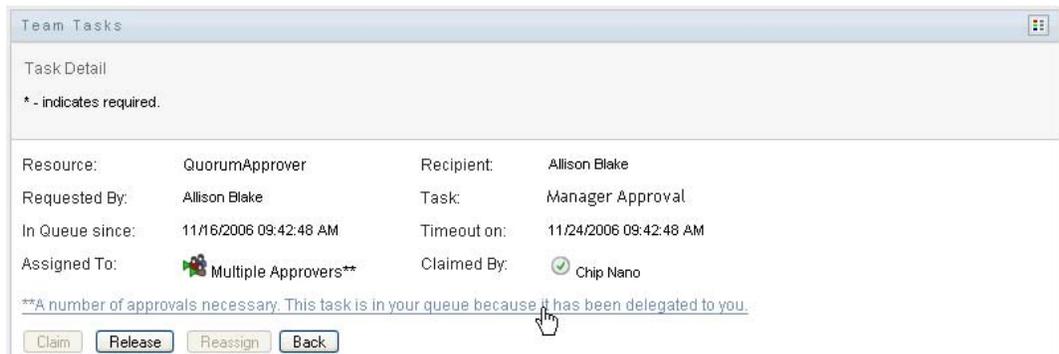
The Task Detail form is displayed.

The screenshot shows the 'Task Detail' form for the 'Manager Approval' task. The page title is 'Novell Identity Manager' and the date is 'Thursday, January 11, 2007'. The user is 'Welcome Margo'. The navigation tabs are 'Identity Self-Service', 'Requests & Approvals', and 'Administration'. The left sidebar contains various menu items under 'My Work', 'My Settings', 'My Team's Work', and 'My Team's Settings'. The main content area shows a 'My Tasks' section with a 'Task Detail' form. The form displays the following information: Resource: Enable Active Directory Account, Recipient: Allison Blake, Requested By: Allison Blake, Task: Manager Approval, In Queue since: 01/11/2007 12:59:51 PM, Timeout on: 01/13/2007 12:59:51 PM, Assigned To: Margo MacKenzie, Claimed By: (empty). Below the form are buttons for 'Claim', 'Release', 'Reassign', and 'Back'. The 'Form Detail' section shows the 'Manager Approval' form with the instruction: 'Please select the appropriate button to approve or reject the request.' The form includes fields for 'Reason' (with a dropdown menu showing 'I need this resource.') and 'Comment' (with a text area). A 'View Comment History' button is located below the comment field.

When a task is assigned to multiple approvers, the Task Detail form displays the *Multiple Approvers* icon next to the *Assigned To* field, and displays text below the icon to indicate that multiple approvals are necessary.



2 To display more information about a task assigned to multiple approvers, click the text under the *Multiple Approvers* icon:



A pop-up window displays to indicate how many approvals are required, who the current addressees are, and what the approval status currently is.



The requirements for the task depend on how the task was configured by your administrator:

- ◆ If the approval type is *group*, the task has been assigned to several users within a group, but only one is expected to claim and approve the task.
- ◆ If the approval type is *multiple approvers*, the task has been assigned to several addressees, and all of the addressees must claim and approve the task.
- ◆ If the approval type is *quorum*, the task has been assigned to several addressees, and a quorum of addressees is sufficient to approve the task. The definition of a quorum is configured by the administrator. To define the quorum, the administrator specifies an

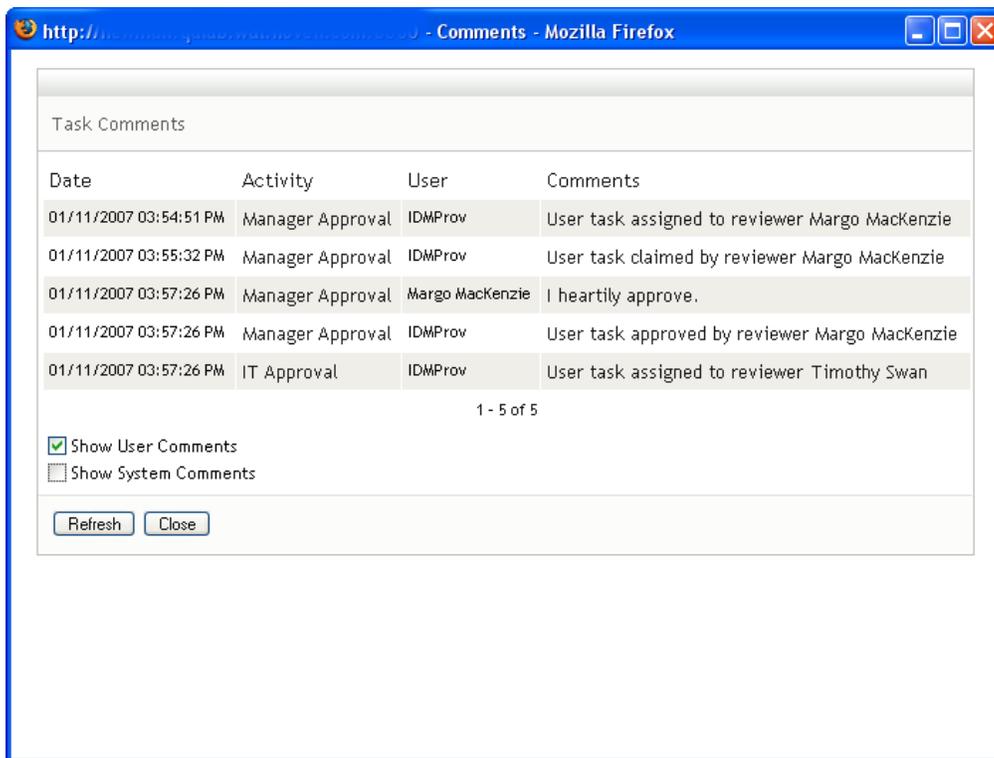
approval condition that specifies the precise number of approvals or the percentage of approvals needed.

The workflow system performs *short circuit evaluation* to optimize quorums. Whenever a quorum approval condition reaches the point where a quorum is not possible, the activity is denied and the task is removed from the queues of all addressees.

- 3 To claim a task, follow the instructions under [Section 10.2.3, “Claiming a Task,”](#) on page 119.
- 4 To view the comment history for the task, click *View Comment History*.

A pop-up window lets you see user and system comments. The order in which comments appear is determined by the time stamp associated with each comment. Comments entered first are displayed first. For parallel approval flows, the order of activities being processed concurrently can be unpredictable.

- 4a To display user comments, click *Show User Comments*.

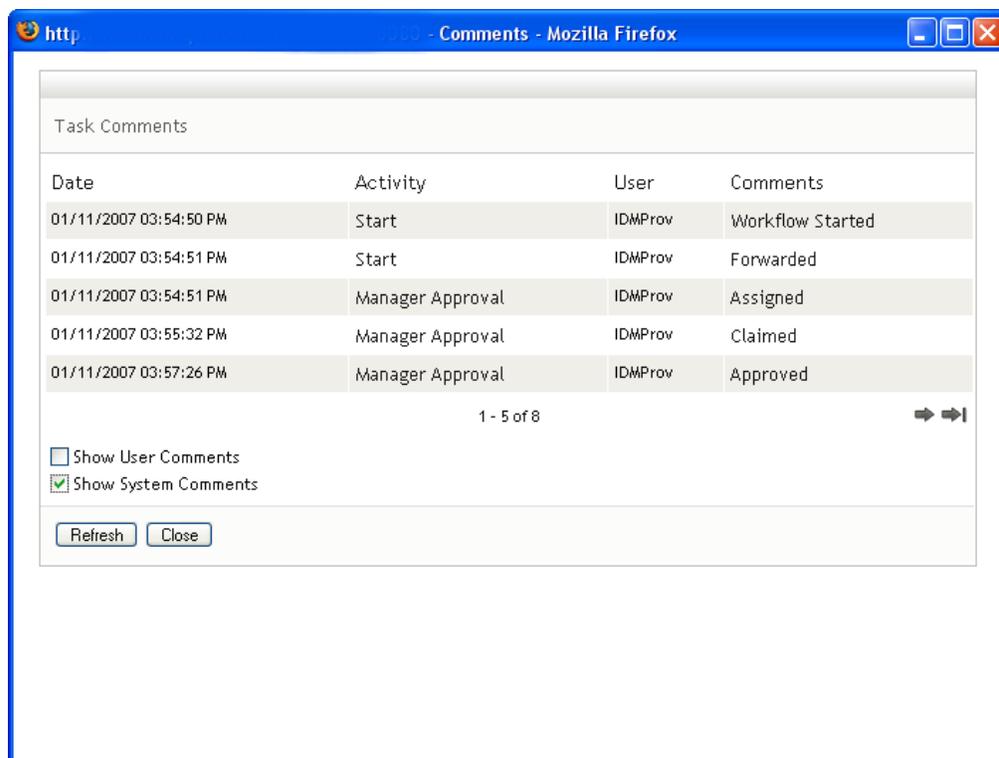


User comments include the following kinds of information:

- ♦ The date and time when each comment was added.
- ♦ The name of the activity to which each comment applies. The list of activities displayed includes user and provisioning activities that have been processed or are currently being processed.
- ♦ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, IDMProv) is the user name. Comments generated by the workflow system are localized automatically.
- ♦ The comment text, which includes the name of the user who is the current assignee for each activity.

The workflow designer can disable the generation of user comments for a workflow. For more information, see the *Identity Manager User Application: Design Guide*. (<http://www.novell.com/documentation/idm35/index.html>)

4b To display system comments, click *Show System Comments*.



System comments include the following kinds of information:

- The date and time when each comment was added.
- The name of the activity to which each comment applies. When you display system comments, all activities in the workflow are listed. The list of activities includes those that have been processed or are currently being processed.
- The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, IDMProv) is the user name. Comments generated by the workflow system are localized automatically.
- The comment text, which indicates what action was taken for the activity.

System comments are intended primarily for debugging purposes. Most business users do not need to look at the system comments for a workflow.

4c To scroll through a long list of comments, click the arrows at the bottom of the screen. For example, to scroll to the next page, click the *Next* arrow.



4d Click *Close* to close the window.

5 To return to the task list, click *Back*.

10.2.3 Claiming a Task

To claim a task to work on:

1 Click *Claim*.

The screenshot shows a web browser window titled "My Tasks". The main content area is divided into two sections: "Task Detail" and "Form Detail".

Task Detail

* - indicates required.

Resource: Enable Active Directory Account Recipient: Allison Blake
Requested By: Allison Blake Task: Manager Approval
In Queue since: 12/04/2006 01:39:22 PM Timeout on: 12/06/2006 01:39:22 PM
Assigned To: Margo MacKenzie Claimed By:

Below the task details are four buttons: "Claim" (highlighted with a mouse cursor), "Release", "Reassign", and "Back".

Form Detail

Manager Approval
Please select the appropriate button to approve or reject the request.

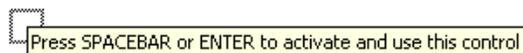
Requested by: Allison Blake Recipient: Allison Blake
Request Date: 12/04/2006
Reason:
Comment:

The *Form Detail* section of the page is updated to include the *Deny* and *Approve* buttons, as well as any other action buttons included by the flow definition, and the appropriate fields become editable.

If the resource you've requested requires a digital signature, the *Digital Signature Required* icon appears in the upper right corner of the page.



In addition, on Internet Explorer, a message appears indicating that you need to press the Spacebar or the Enter key to activate the digital signature applet.



2 If you're working on a task that requires a digital signature, perform these steps:

2a If you're using a smart card, insert the smart card into the smart card reader.

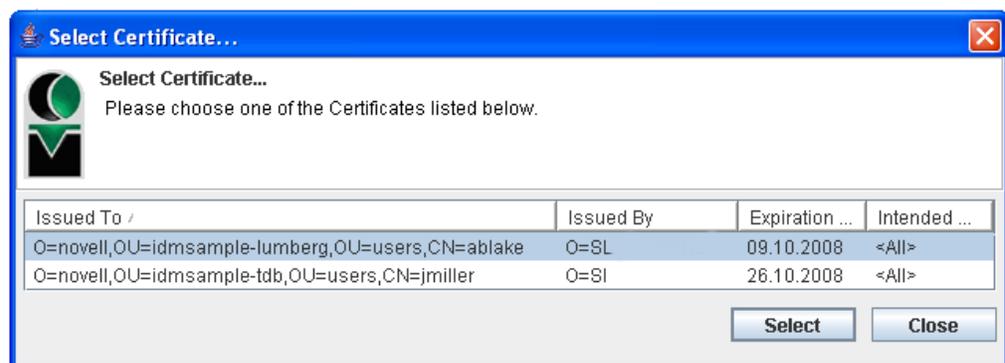
- 2b** On Internet Explorer, press the Spacebar or the Enter key to activate the applet. At this point, your browser might display a security warning message.



- 2c** Click *Run* to proceed.
- 2d** Fill in the fields in the approval form. The fields on the form vary depending on which resource you requested.
- 2e** Click the check box next to the digital signature confirmation message to indicate that you are ready to sign.

The digital signature confirmation message varies depending on how the provisioning resource was configured by the administrator.

The applet then displays a pop-up window that allows you to select a certificate. The pop-up window lists certificates imported to the browser as well as certificates imported to the smart card (if one is currently connected).



2f Select the certificate you want to use and click *Select*.



2g If you select a certificate that has been imported into your browser, type the password for the certificate in the *Password* field on the request form.

2h If you select a certificate that has been imported to your smart card, type the PIN for your smart card and click *OK*.

You do not need to type the password for the certificate if you're using a smart card, because the certificate password has already been transmitted to the card.



If your administrator has enabled the ability to preview the user agreement, the *Preview* button is enabled.

2i Click *Preview* to see the user agreement.

If the digital signature type is set to Form, a PDF document is displayed.

If the digital signature type is set to data, an XML document is displayed.

- 3 To deny the request, click *Deny*.

The screenshot shows a web form titled "Form Detail" with a sub-header "Manager Approval". Below the sub-header is a blue instruction: "Please select the appropriate button to approve or reject the request." The form contains several fields: "Requested by: Allison Blake" and "Recipient: Allison Blake" on the same line; "Request Date: 12/04/2006" on the next line; "Reason: test" in a text input field; and a large empty text area for "Comment:". At the bottom of the form, there are three buttons: "View Comment History", "Deny", and "Approve". A mouse cursor is pointing at the "Deny" button, which is highlighted with a yellow border.

- 4 To approve the request, click *Approve*.

This screenshot is identical to the one above, showing the "Manager Approval" form. In this instance, the mouse cursor is pointing at the "Approve" button, which is highlighted with a yellow border.

The user application displays a message indicating whether the action was successful.

10.3 Requesting a Resource

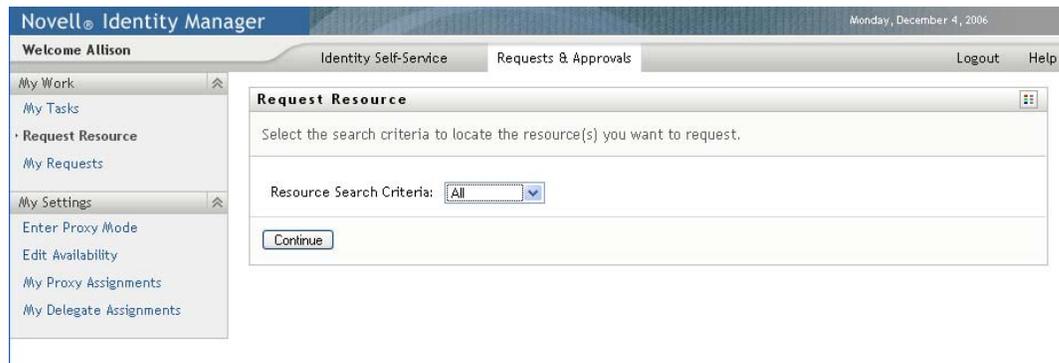
The *Request Resource* action allows you to make a resource request. When you initiate the request, the user application displays the initial request form. This form lets you specify all of the information needed for the request.

When a resource request is submitted, the request starts a workflow. The workflow coordinates the approvals needed to fulfill the request. Some resource requests require approval from a single individual; others require approval from several individuals. In some instances, a request can be fulfilled without any approvals.

To request a resource:

- 1 Click *Request Resource* in the *My Work* group of actions.

The Request Resource page is displayed.

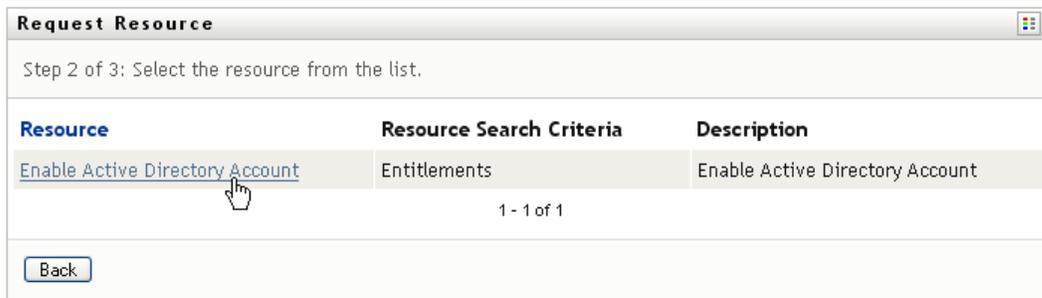


- 2 Select the category of the resource in the *Resource Search Criteria* drop-down list. Select *All* to include resources from all available categories.
- 3 Click *Continue*.

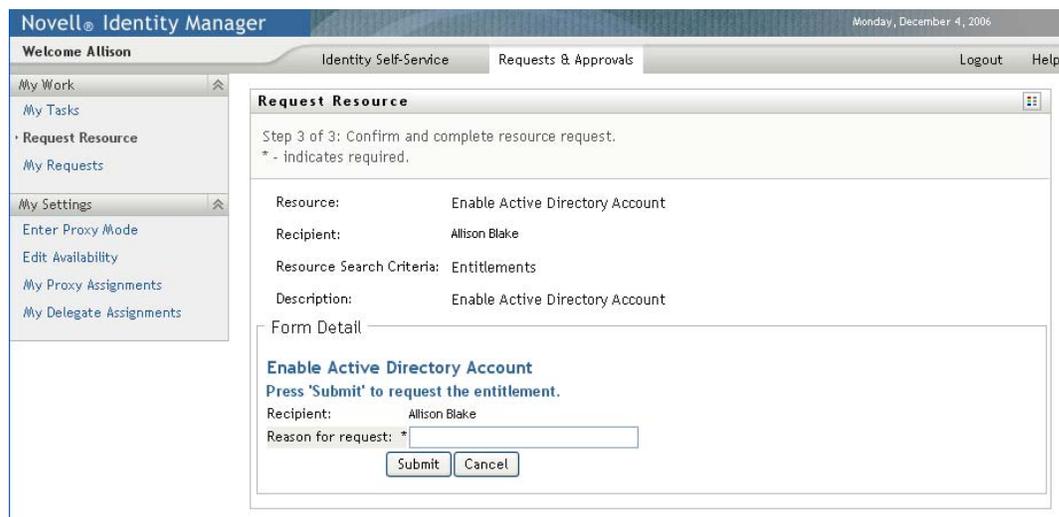
The Request Resource page displays a list of resources available to the current user.

The user application enforces security constraints to ensure that you see only those request types to which you have access rights.

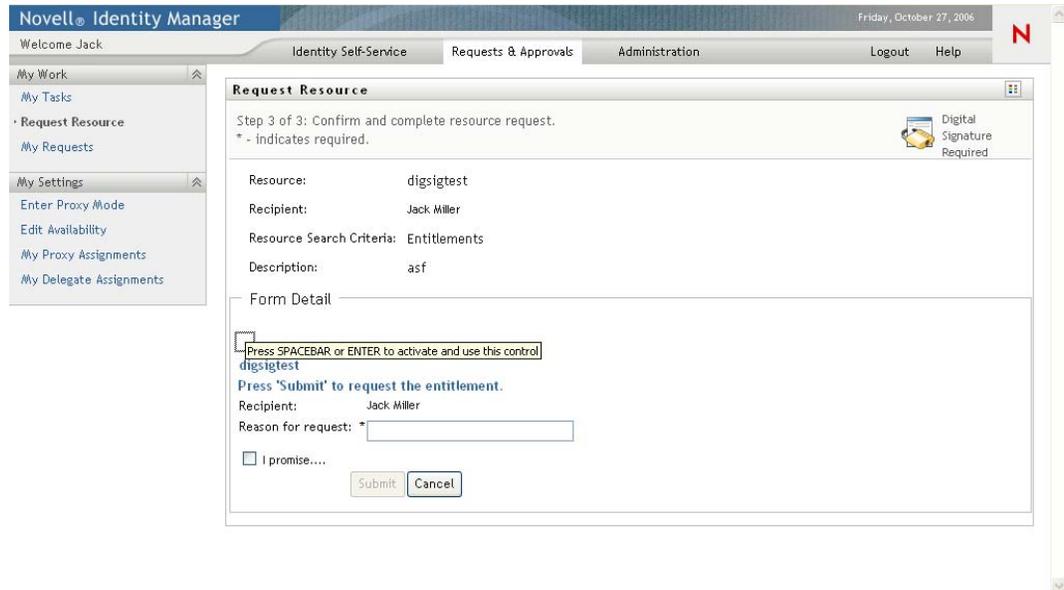
- 4 Select the desired resource by clicking the resource name.



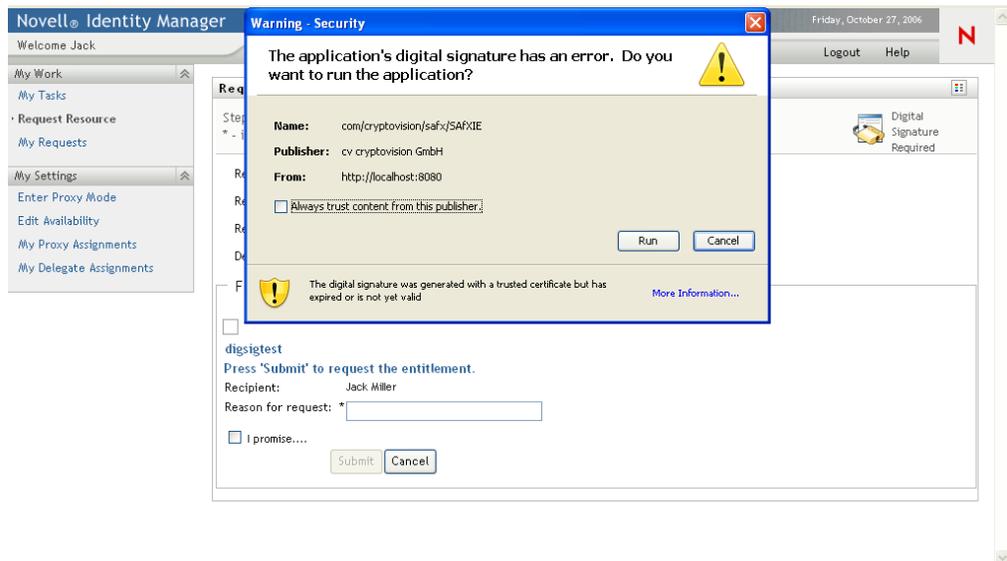
The Request Resource page displays the initial request form.



If the resource you've requested requires a digital signature, the *Digital Signature Required* icon appears in the upper right corner of the page. In addition, on Internet Explorer, a message appears indicating that you need to press the Spacebar or the Enter key to activate the digital signature applet:



- 5 If you're making a request that requires a digital signature, perform these steps:
 - 5a If you're using a smart card, insert the smart card into the smart card reader.
 - 5b On Internet Explorer, press the Spacebar or the Enter key to activate the applet. At this point, your browser might display a security warning message.



- 5c Click *Run* to proceed.
- 5d Fill in the fields in the initial request form. The fields on the form vary depending on which resource you requested.

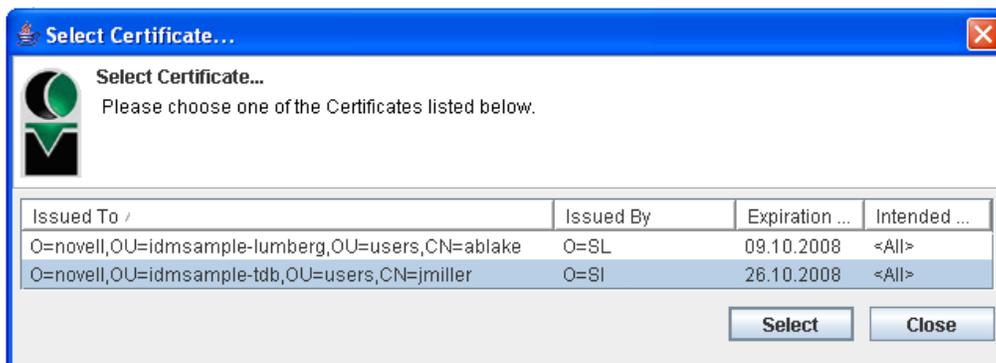
- 5e** Click the check box next to the digital signature confirmation message to indicate that you are ready to sign.

The digital signature confirmation message varies depending on how the provisioning resource was configured by the administrator.

The applet then displays a pop-up window that allows you to select a certificate. The pop-up window lists certificates imported to the browser as well as certificates imported to the smart card (if one is currently connected).



- 5f** Select the certificate you want to use and click *Select*.

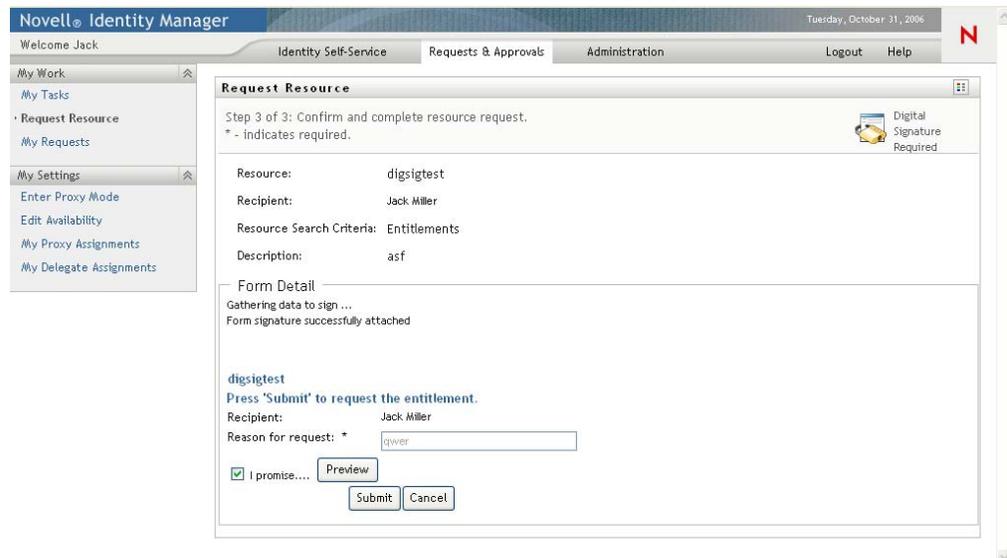


- 5g** If you select a certificate that has been imported into your browser, you need to type the password for the certificate in the *Password* field on the request form.
- 5h** If you select a certificate that has been imported to your smart card, type the PIN for your smart card and click *OK*.

You do not need to type the password for the certificate if you're using a smart card, because the certificate password has already been transmitted to the card.

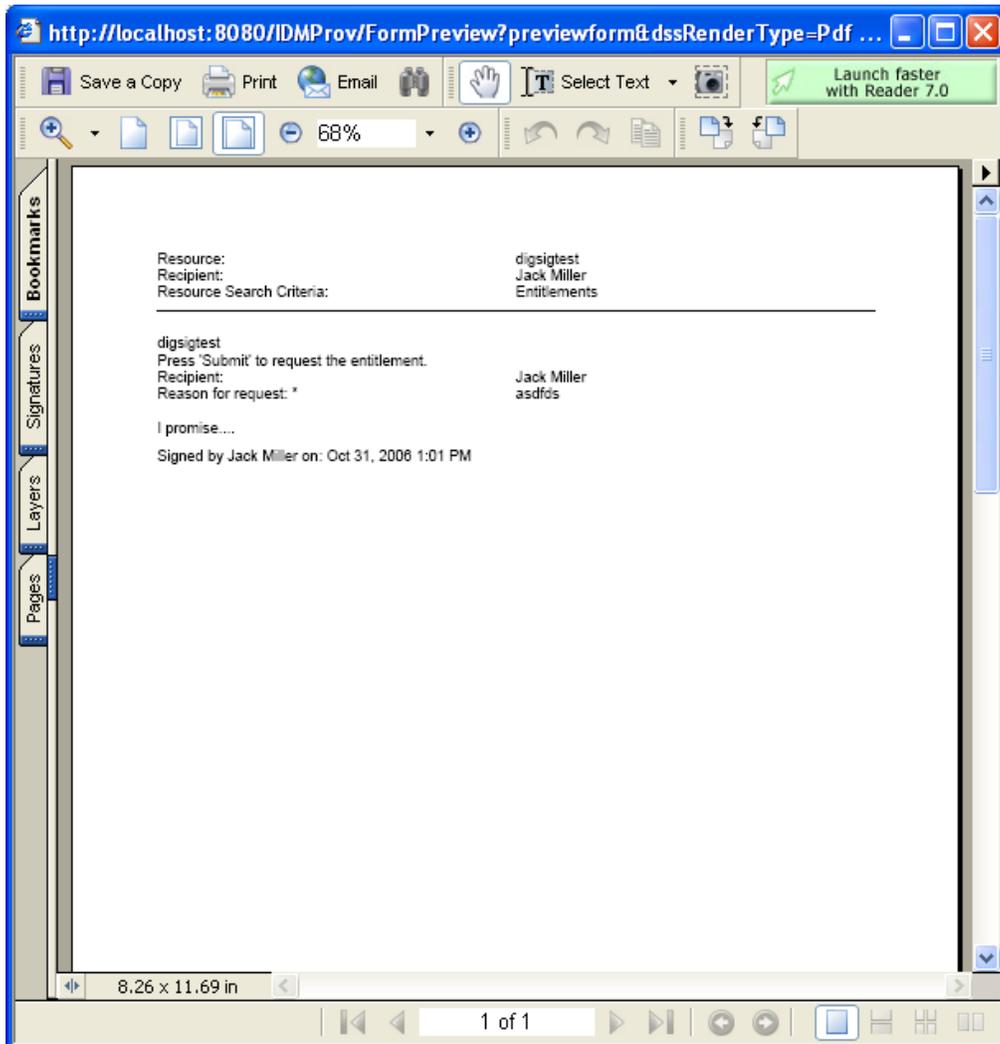


If your administrator has enabled the ability to preview the user agreement, the *Preview* button is enabled.

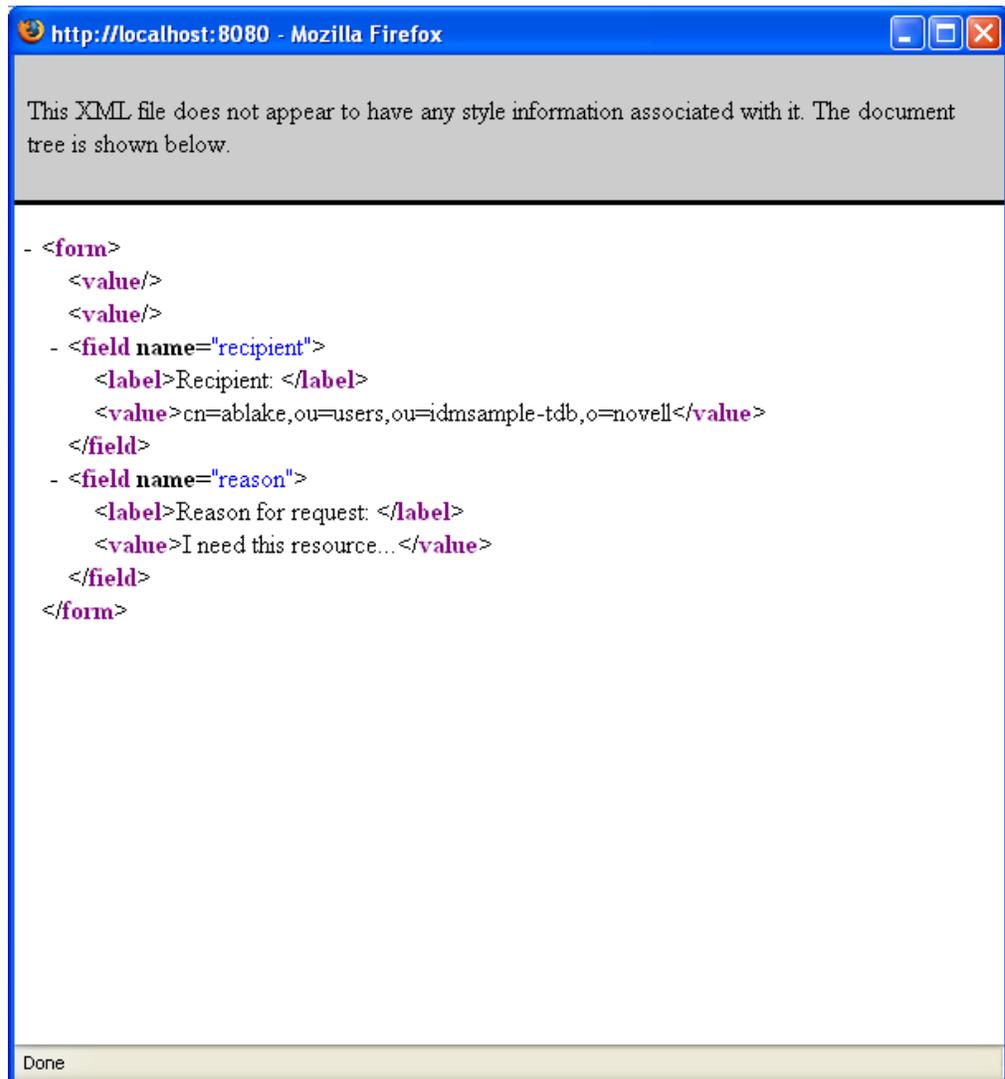


5i Click *Preview* to see the user agreement.

If the digital signature type is set to Form, a PDF document is displayed.

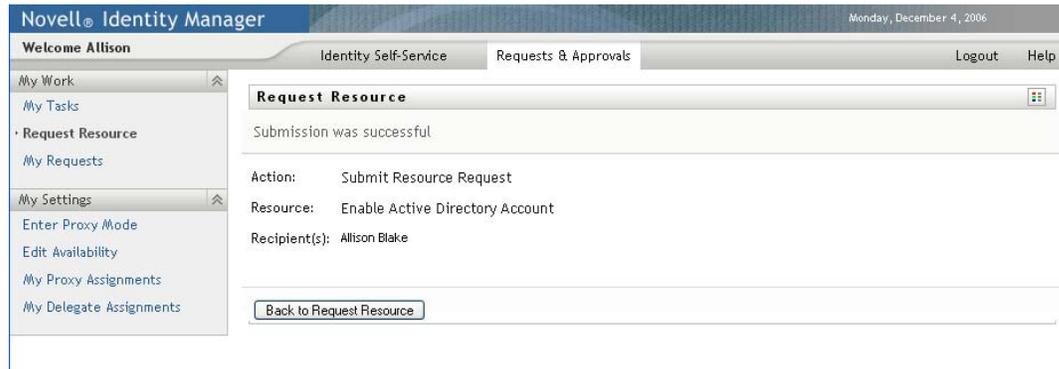


If the digital signature type is set to data, an XML document is displayed.



- 6 If the request you're making does not require a digital signature, simply fill in the fields on the initial request form. The fields on the form vary depending on which resource you requested.
- 7 Click *Submit*.

The Request Resource page displays a status message indicating whether the request was submitted successfully.

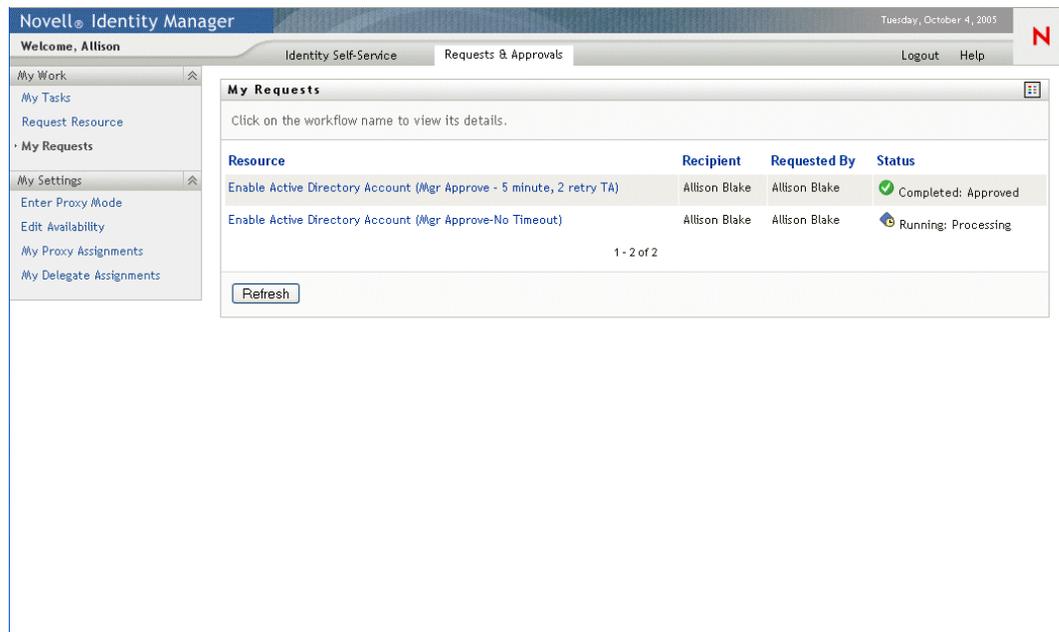


10.4 Checking the Status of Your Requests

The *My Requests* action allows you to see the status of the resource requests you've made. It lets you see the history and current state of each request. In addition, it gives you the option to retract a request that is still in process if you have changed your mind and do not need to have the request fulfilled.

To view a list of your requests:

- 1 Click *My Requests* in the *My Work* group of actions.

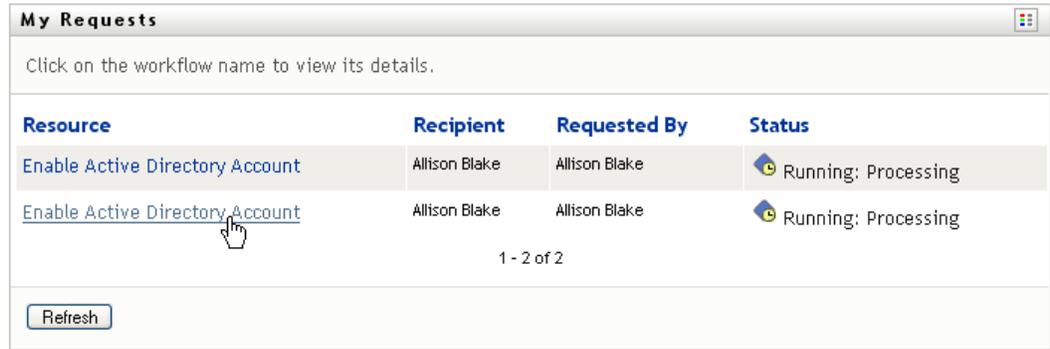


- 2 Select the category of the resource in the *Resource Search Criteria* drop-down list. Select *All* to include resources from all available categories.
- 3 Optionally filter the list of requests by date by selecting *on*, *before*, or *after*, and filling in the *Request Date* field. To include all requests for the selected resource search criteria, leave the *Request Date* field blank.

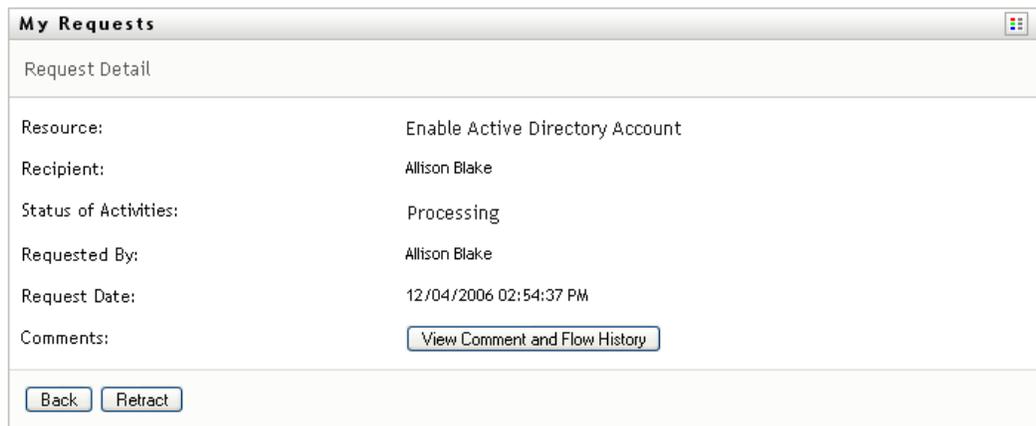
4 Click *Continue*.

The Request Resource page displays your requests. The list includes active requests, as well as requests that have already been approved or denied. The administrator can control how long workflow results are retained for. By default, the Workflow system retains workflow results for 120 days.

5 To view details about a particular resource request, select the request by clicking the name:



The Request Resource page displays details such as when the request was initiated and what the current state of the workflow is.

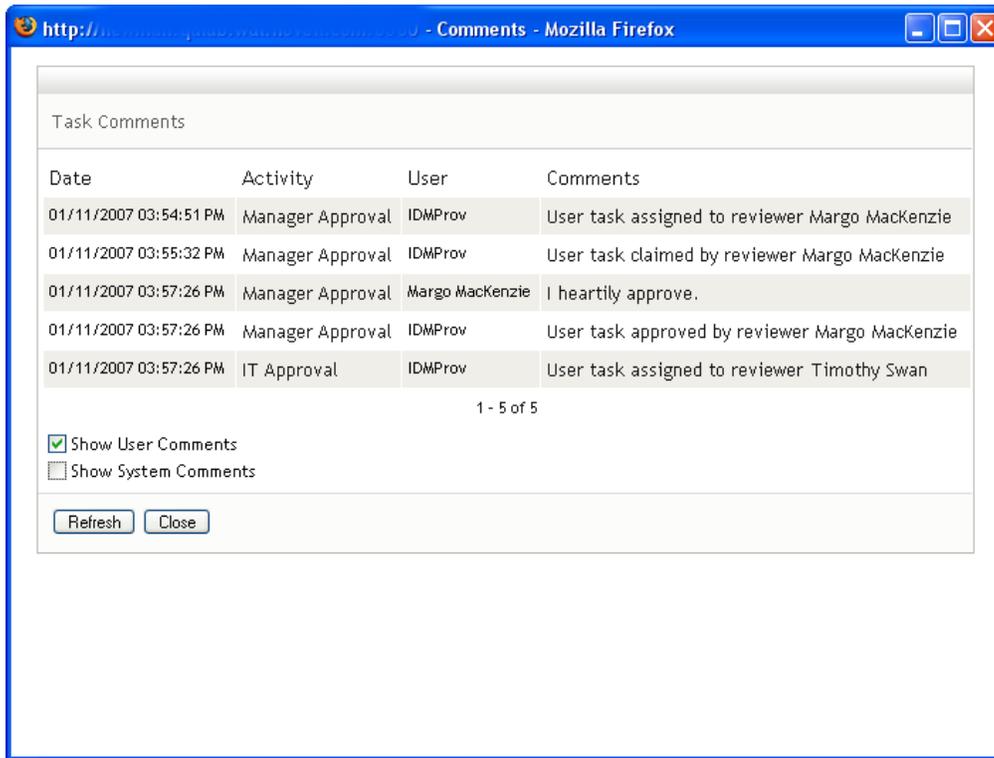


6 To retract the request, click *Retract*.

7 To view comment history for the request, click *View Comment and Flow History*.

A pop-up window lets you see user and system comments. The order in which comments appear is determined by the time stamp associated with each comment. Comments entered first are displayed first. For parallel approval flows, the order of activities being processed concurrently can be unpredictable.

7a To display user comments, click *Show User Comments*.

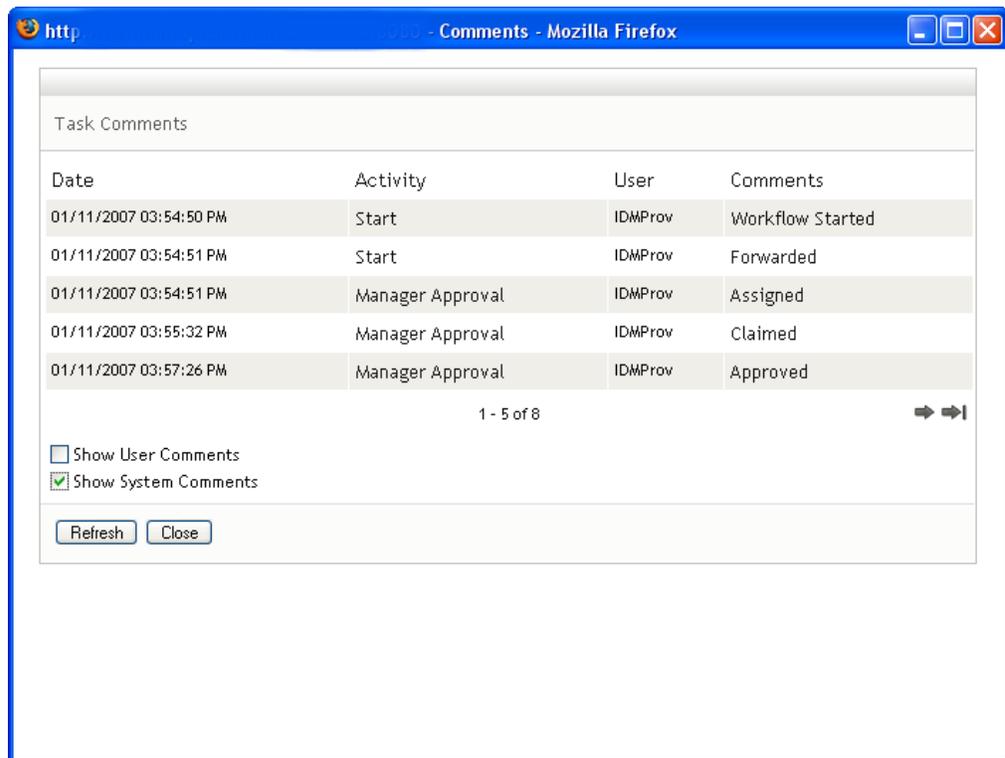


User comments include the following kinds of information:

- ♦ The date and time when each comment was added.
- ♦ The name of the activity to which each comment applies. The list of activities displayed includes user and provisioning activities that have been processed or are currently being processed.
- ♦ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMProv`) is the user name. Comments generated by the workflow system are localized automatically.
- ♦ The comment text, which includes the name of the user who is the current assignee for each activity.

The workflow designer can disable the generation of user comments for a workflow. For more information, see the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>).

7b To display system comments, click *Show System Comments*.



System comments include the following kinds of information:

- ◆ The date and time when each comment was added.
- ◆ The name of the activity to which each comment applies. When you display system comments, all activities in the workflow are listed. The list of activities includes those that have been processed or are currently being processed.
- ◆ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMProv`) is the user name. Comments generated by the workflow system are localized automatically.
- ◆ The comment text, which indicates what action was taken for the activity.

System comments are intended primarily for debugging purposes. Most business users do not need to look at the system comments for a workflow.

7c To scroll through a long list of comments, click the arrows at the bottom of the screen. For example, to scroll to the next page, click the *Next* arrow.



7d Click *Close* to close the window.

Configuring Your Provisioning Settings

11

This section provides instructions for configuring your provisioning settings. Topics include:

- ◆ [Section 11.1, “About the My Settings Actions,” on page 133](#)
- ◆ [Section 11.2, “Acting As a Proxy,” on page 134](#)
- ◆ [Section 11.3, “Specifying Your Availability,” on page 136](#)
- ◆ [Section 11.4, “Viewing and Editing Your Proxy Assignments,” on page 142](#)
- ◆ [Section 11.5, “Viewing and Editing Your Delegate Assignments,” on page 145](#)

11.1 About the My Settings Actions

The *Requests & Approvals* tab in the Identity Manager user application includes a group of actions called *My Settings*. The *My Settings* actions give you the ability to act as a proxy for another user. In addition, they allow you to view your proxy and delegate assignments. If you are a team manager or Provisioning Application Administrator, you might also be permitted to define proxy and delegate assignments, as well as team availability settings.

11.1.1 About Proxies and Delegates

A *delegate* is a user authorized to perform work for another user. A delegate assignment applies to a particular type of resource request.

A *proxy* is a user authorized to perform any and all work (and also define provisioning settings) for one or more users, groups, or containers. Unlike delegate assignments, proxy assignments are independent of resource requests, and therefore apply to all work and settings actions.

Proxy and Delegate Assignments Have Time Periods: Both proxy and delegate assignments are associated with time periods. The time period for a proxy or delegate assignment can be as short or as long as you need it to be. The time period can also have no expiration date.

Proxy and Delegate Actions Are Logged: If logging is enabled, any actions taken by a proxy or delegate are logged along with actions taken by other users. When an action is taken by a proxy or delegate, the log message clearly indicates that the action was performed by a proxy or delegate for another user. In addition, each time a new proxy or delegate assignment is defined, this event is logged as well.

11.1.2 Sample Usage Scenarios

This section describes two business scenarios where proxies and delegates might be used:

- ◆ [“Proxy Usage Scenario” on page 134](#)
- ◆ [“Delegate Usage Scenario” on page 134](#)

Proxy Usage Scenario

Suppose you are a manager who is responsible for approving (or denying) a large number of workflow tasks on a daily basis. In addition, you are also responsible for editing provisioning settings for a large number of users in your organization. In this situation, you might want to assign a proxy so that some of your work can be off-loaded to a trusted member of your team.

Delegate Usage Scenario

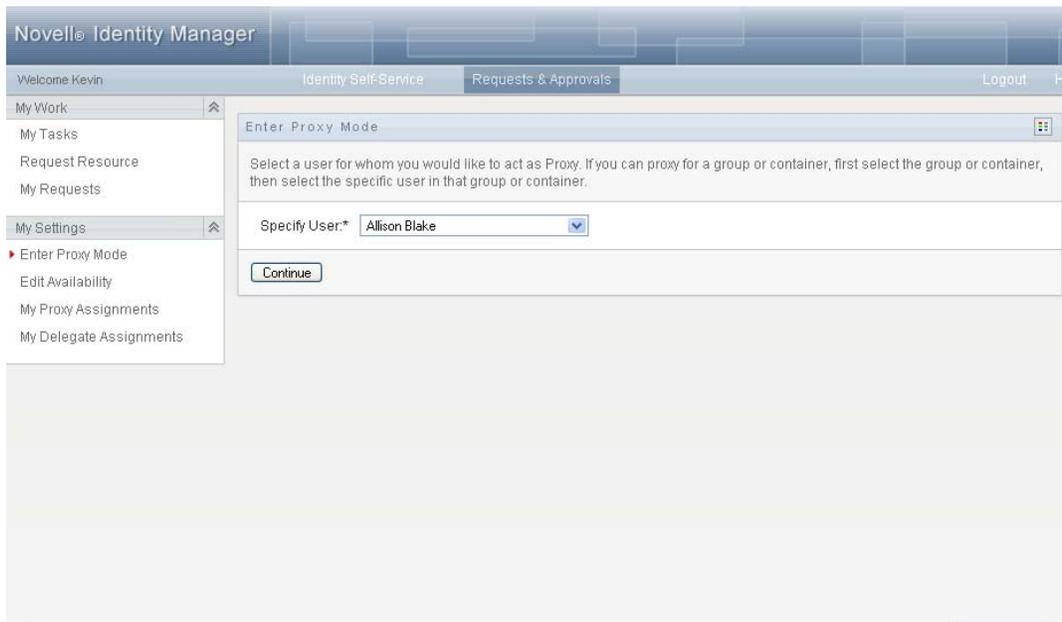
Suppose you are a manager who is responsible for approving or denying requests for ten different types of provisioned resources. All ten request types need regular attention, but you would rather have another individual in your organization attend to six of them. In this case, you could define a delegate for these six resource request types. If necessary, you could restrict this delegate relationship to a period of hours, days, or weeks. Alternatively, you could specify no expiration for the delegate relationship, thereby establishing this relationship as a more permanent arrangement.

11.2 Acting As a Proxy

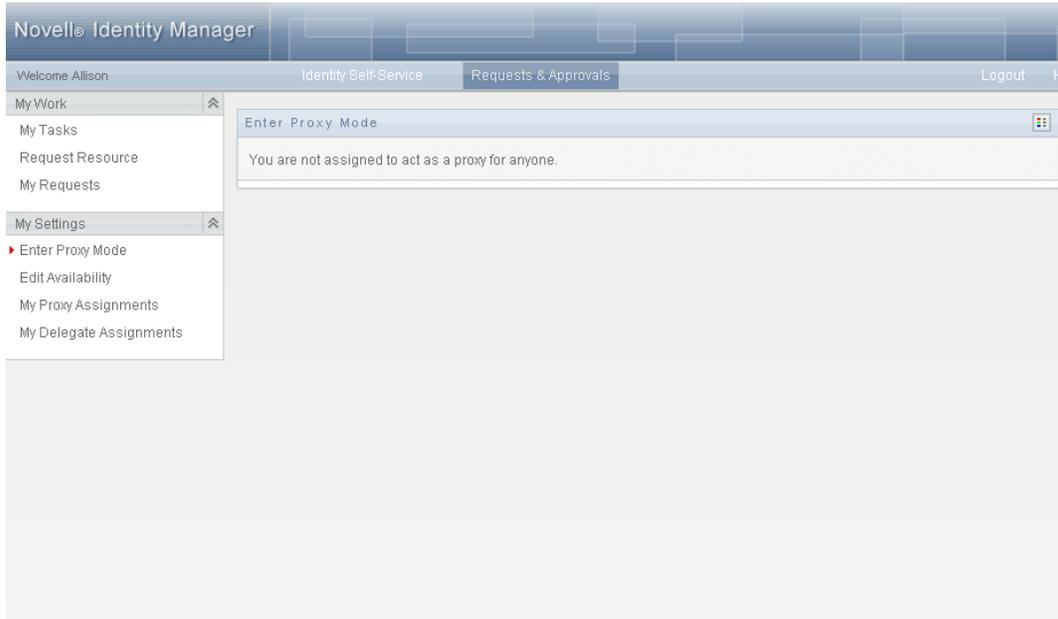
The *Enter Proxy Mode* action allows you to act as a proxy for another user.

- 1 Click *Enter Proxy Mode* in the *My Settings* group of actions.

If you are authorized to act as a proxy for at least one other user, the user application displays a list of users.



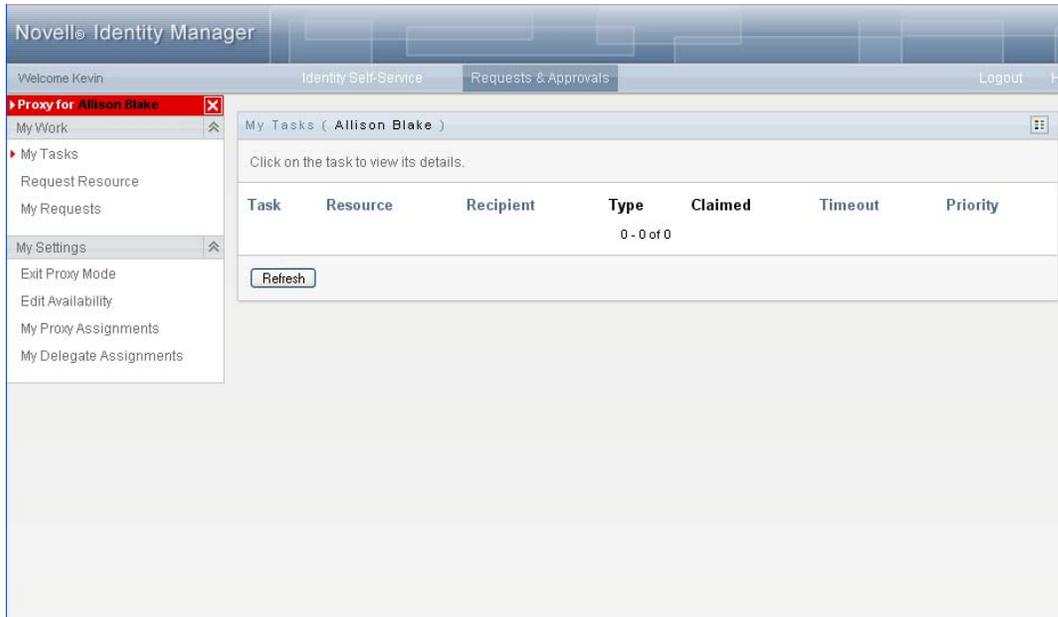
If you are not authorized to act as a proxy for any other user, the user application displays this message:



2 Select the user for whom you want to act as proxy and click *Continue*.

If you are designated as a proxy for a group or container, you must select the group or container before you can select the user.

The user application refreshes the display and returns you to the *My Tasks* action, the default action when you log on. The task lists shows tasks assigned to the user for whom you are acting as proxy. A message appears above the *My Work* group (as well as in the title bar) indicating that you are now acting as a proxy for another user.



At this point, you can perform any action that the user for whom you are acting as proxy could perform. The list of actions available changes depending on your authority and the authority of the user for whom you are acting as proxy.

11.3 Specifying Your Availability

The *Edit Availability* action allows you to specify which resource requests with a delegate assignment you are unavailable to work on during a particular time period. During the time period when you are unavailable for a particular request, the user delegated to act on that request can work on it.

If you prefer not to specify your availability for each request definition individually, you can use the *Edit Availability* action to establish global settings pertaining to delegation.

TIP: Before using the *Edit Availability* action, you need to have at least one delegate assignment to work on. You need to have your team manager (or the Provisioning Application Administrator) create delegate assignments for you.

- ◆ [Section 11.3.1, “Setting Your Availability Status,” on page 136](#)
- ◆ [Section 11.3.2, “Creating or Editing an Availability Setting,” on page 138](#)
- ◆ [Section 11.3.3, “Deleting an Availability Setting,” on page 141](#)

11.3.1 Setting Your Availability Status

- 1 Click *Edit Availability* in the *My Settings* group of actions.

The user application displays the Edit Availability page. If you do not have any existing availability settings, the display list is empty:

The screenshot shows the 'Edit Availability' page in the Novell Identity Manager user application. The page title is 'Edit Availability' and it includes a sub-header: 'Edit, delete, or create a new "Selectively Available" setting, or change the status across all requests.' The user is identified as 'Allison Blake' and the current status is 'Available for ALL Requests'. There is a 'Change Status:' dropdown menu with '(Select One)' selected. Below this is a table with the following data:

User	Unavailable From	Unavailable Until	Resource
Allison Blake	--	--	All

At the bottom of the table, it says '0 - 0 of 0'. There are 'Refresh' and 'New' buttons at the bottom of the page.

If no delegates have been assigned for you, the user application displays a message indicating that you cannot change your status on the Edit Availability page.

If you have one or more availability settings, the display list shows these settings:



- 2 To see details about a particular resource associated with an availability assignment, click the name of the resource:

Resource

[Enable Active Directory Account](#)

The page then displays a pop-up window that provides information about the delegate assignment:



This information is particularly helpful in situations where the same resource name appears more than once in the availability settings list.

- 3 Specify your status by selecting one of the following options in the *Change Status* drop-down list:

Status	Description
<i>Available for ALL Requests</i>	<p>This is the default status. It indicates that you are globally available. When this status is in effect, requests assigned to you are not delegated, even if you have assigned delegates.</p> <p>The <i>Available for ALL Requests</i> status overrides other settings. If you change the status to one of the other settings, and then change it back to <i>Available for ALL Requests</i>, any <i>Selectively Available</i> settings previously defined are removed.</p>
<i>NOT Available for ANY Requests</i>	<p>Specifies that you are globally unavailable for any request definitions currently in the system.</p> <p>Choosing the <i>Not Available for ANY Requests</i> status indicates that you are unavailable for each existing delegate assignment and changes the current status to <i>Not Available for Specified Requests</i>. Assignments are effective immediately until the delegate assignment expires. This setting does not affect availability for new assignments created after this point.</p>
<i>NOT Available for Specified Requests</i>	<p>Specifies that you are not available for certain resource request definitions. During the time period when you are unavailable for a particular request, the user delegated to act on that request can work on it.</p> <p>The <i>NOT Available for Specified Requests</i> option takes you to the Edit Availability page. It is the same action as clicking the <i>New</i> button.</p>

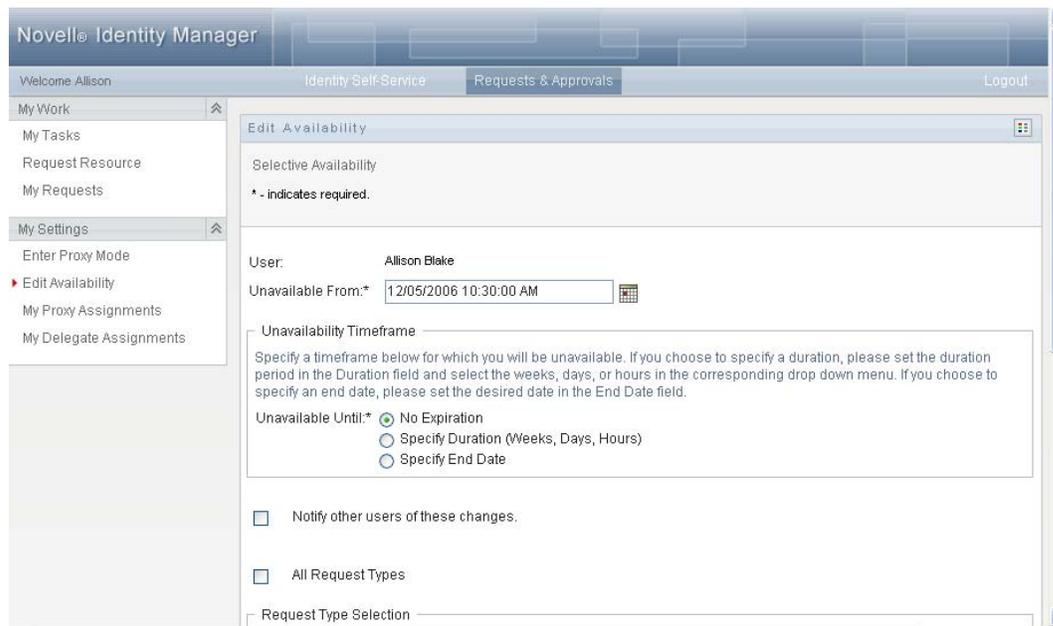
11.3.2 Creating or Editing an Availability Setting

- 1 To create a new availability setting, click *New* (or select *NOT Available for Specified Requests* in the *Change Status* drop-down list).
- 2 To edit an existing setting, click *Edit* next to the setting you want to modify:



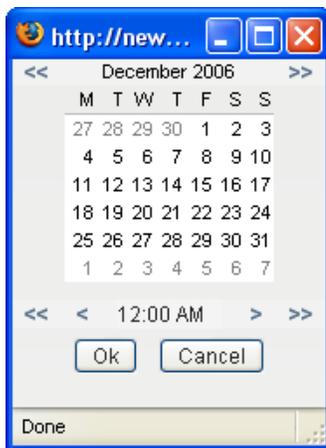
The user application displays a set of controls that allow you to specify the time period for which you are unavailable and select the requests to which this setting applies.

The list of requests displayed includes only those that have a delegate assignment.



3 Specify the time period during which you will be unavailable:

- 3a** Specify when the time period begins by typing the start date and time in the *Unavailable From* box, or by clicking the calendar button and selecting the date and time.



- 3b** Specify when the time period ends by clicking one of the following:

Button	Description
<i>Duration</i>	Lets you specify the time period in weeks, days, or hours.
<i>End date</i>	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.
<i>No Expiration</i>	Indicates that this unavailability setting does not expire.

The end date you specify must be within the time period allowed by the delegate assignment. For example, if the delegate assignment expires on October 31, 2007, you cannot specify an expiration date of November 15, 2007 for the availability setting. If you specify an expiration date of November 15, 2007, it is automatically adjusted when it is submitted to expire on October 31, 2007.

4 Specify whether you want to send e-mail notifications to other users by filling in these fields:

Field	Description
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this availability assignment.
<i>Addressee</i>	Specifies which users should receive e-mail notifications: Selective: Allows you to send e-mail notifications to any users you select.

5 Select one or more requests in the *Types of Requests* list, and click *Add*.

On this page, you select the types of requests not to accept during the time you are unavailable. This has the effect of delegating these requests to other users.

Request Type Selection

Select the types of requests that you will not accept during the time you are unavailable. Only requests with a delegate assignment are available for selection below.

Types of Requests:

Enable Active Directory Account

Declined for the Specified Period:*

Each request you add is included in the *Declined for the Specified Period* list.

Request Type Selection

Select the types of requests that you will not accept during the time you are unavailable. Only requests with a delegate assignment are available for selection below.

Types of Requests:

Declined for the Specified Period:*

Enable Active Directory Account

- 6 To indicate that this availability setting applies to all request types, click *All Request Types* instead of selecting the request types individually.

All Request Types

The *All Request Types* check box is only available when the resource search criteria for the delegate assignment is set to *All*.

Request Type Selection

Select the types of requests for this delegate assignment. Select a Resource Category to display the available requests.

Resource Search Criteria:

- 7 To remove a request from the list, click *Remove*.
- 8 Click *Submit* to commit your changes.

11.3.3 Deleting an Availability Setting

To delete an existing availability setting:

- 1 Click *Remove* next to the setting:



11.4 Viewing and Editing Your Proxy Assignments

The *My Proxy Assignments* action allows you to view your proxy assignments. If you are a Provisioning Application Administrator, you can also use this action to edit proxy assignments.

Only Provisioning Application Administrators and team managers can assign proxies, as described below:

- ♦ The Provisioning Application Administrator has the ability to define proxy assignments for any user in the organization.
- ♦ A team manager might have the ability to define proxy settings for users on his team, depending on how the team was defined. The proxies must also be within the team. To define a proxy, a team manager must use the *Team Proxy Assignments* action.

If a team manager needs to select a proxy who is not within the team, the manager must request that the Provisioning Application Administrator define the proxy relationship.

11.4.1 Displaying Your Proxy Settings

- 1 Click *My Proxy Assignments* in the *My Settings* group of actions.

The user application displays your current settings. The proxy assignments displayed are those that specify you as proxy for someone else, as well as those that specify someone else as proxy for you.

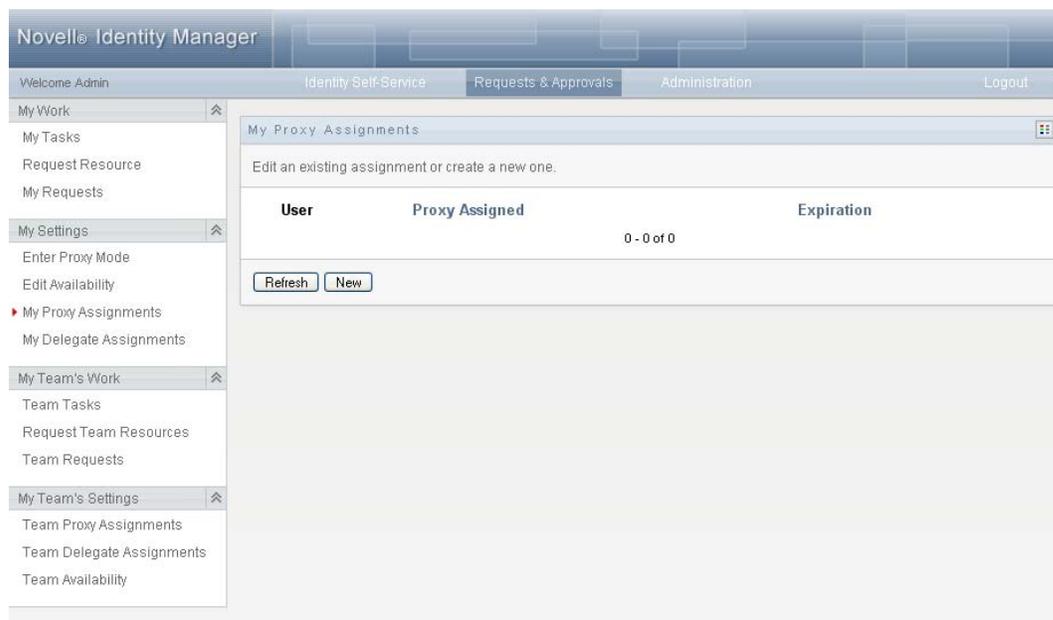
If you are not a Provisioning Application Administrator, you see a read-only view of your proxy assignments:

The screenshot shows the Novell Identity Manager user interface. The top navigation bar includes 'Novell Identity Manager', 'Welcome Allison', 'Identity Self-Service', 'Requests & Approvals', and 'Logout'. The left sidebar contains a menu with 'My Work', 'My Tasks', 'Request Resource', 'My Requests', 'My Settings', 'Enter Proxy Mode', 'Edit Availability', 'My Proxy Assignments', and 'My Delegate Assignments'. The main content area is titled 'My Proxy Assignments' and contains the text: 'Assignments are specified by your manager or administrator. Only they can add, edit, or remove them.' Below this text is a table with the following data:

User	Proxy Assigned	Expiration
Allison Blake	Kevin Chester	No Expiration

Below the table, it indicates '1 - 1 of 1' and there is a 'Refresh' button.

If you have administrative privileges, you are provided with buttons that let you create and edit proxy assignments.



2 To refresh the list, click *Refresh*.

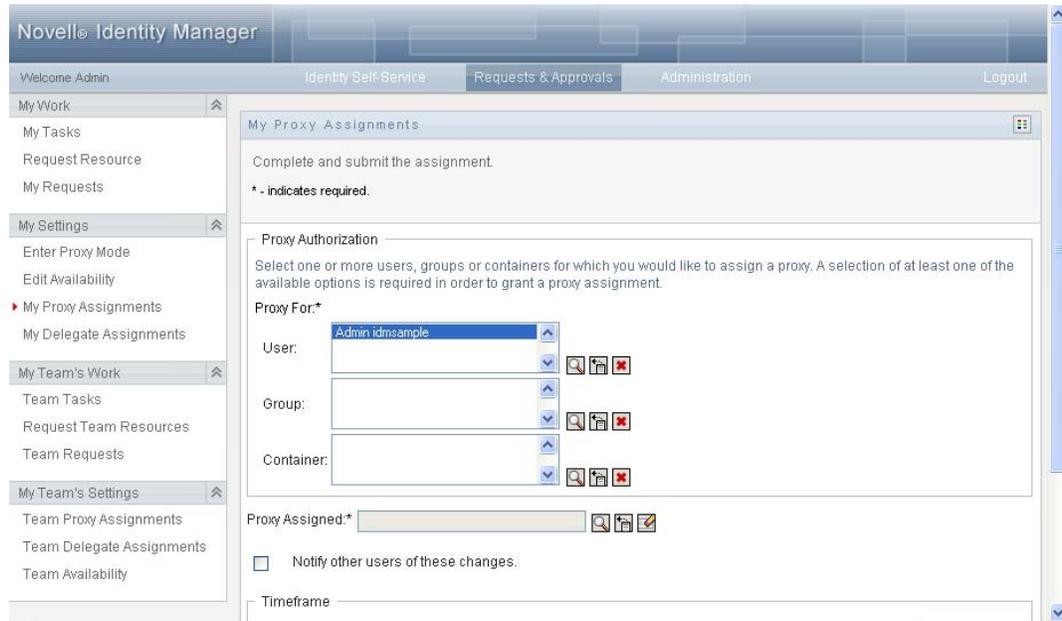
11.4.2 Creating or Editing Proxy Assignments

1 To create a new proxy assignment, click *New*.

2 To edit an existing proxy assignment, click *Edit* next to the assignment:



If you are the Provisioning Application Administrator, the user application presents the following interface to allow you to define proxy assignments:



3 If you are the Provisioning Application Administrator, select one or more users, groups, and containers for which you want to define a proxy.

Use the *Object Selector* or the *Show History* tool to select a user, group, or container.

4 If you are a team manager, select one or more users for whom you want to define a proxy.

5 Specify a user to be the proxy in the *Proxy Assigned* field.

6 Specify when the time period ends by clicking one of the following:

Button	Description
<i>No Expiration</i>	Indicates that this proxy assignment does not expire.
<i>Specify Expiration</i>	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.

7 Click *Submit* to commit your changes.

11.4.3 Deleting Proxy Assignments

To delete an existing proxy assignment:

1 Click *Remove* next to the assignment:



11.5 Viewing and Editing Your Delegate Assignments

The *My Delegate Assignments* action allows you to view your delegate assignments. If you are a Provisioning Application Administrator, you can also use this action to edit delegate assignments.

Only Provisioning Application Administrators and team managers can assign delegates, as described below:

- ♦ The Provisioning Application Administrator has the ability to define delegate assignments for any user in the organization.
- ♦ A team manager might have the ability to define delegate settings for users on his team, depending on how the team rights have been defined. The delegates must also be within the team. To define a delegate, a team manager must use the *Team Delegate Assignments* action.

If a team manager needs to define a delegate relationship for users who are not within his or her scope of authority, he or she must request that the Provisioning Application Administrator define the delegate relationship.

TIP: Before using the *Edit Availability* action, you need to have at least one delegate assignment to work on.

11.5.1 Displaying Your Delegate Settings

- 1 Click *My Delegate Assignments* in the *My Settings* group of actions.

The user application displays your current settings.

If you are not a Provisioning Application Administrator, you see a read-only view of your delegate assignments:

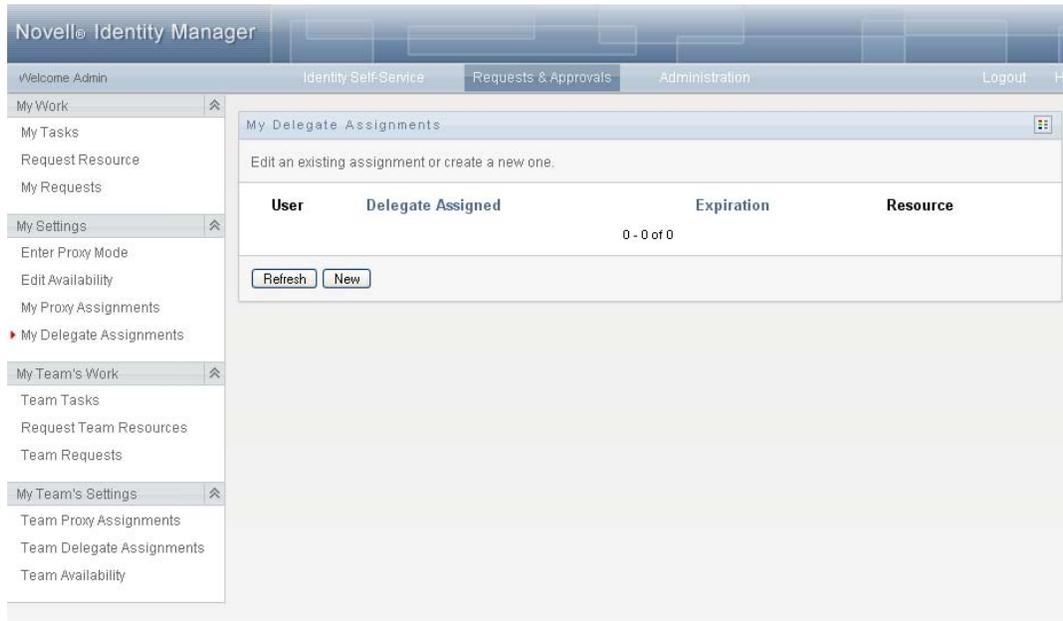


The screenshot displays the 'My Delegate Assignments' page in the Novell Identity Manager interface. The page title is 'My Delegate Assignments' and it includes a sub-header: 'Assignments are specified by your manager or administrator. Only they can add, edit, or remove them.' Below this is a table with the following data:

User	Delegate Assigned	Expiration	Resource
Allison Blake	Kevin Chester	No Expiration	All

At the bottom of the table, it indicates '1 - 1 of 1' and there is a 'Refresh' button.

If you have administrative privileges, you are provided with buttons that let you create and edit delegate assignments.



2 To refresh the list, click *Refresh*.

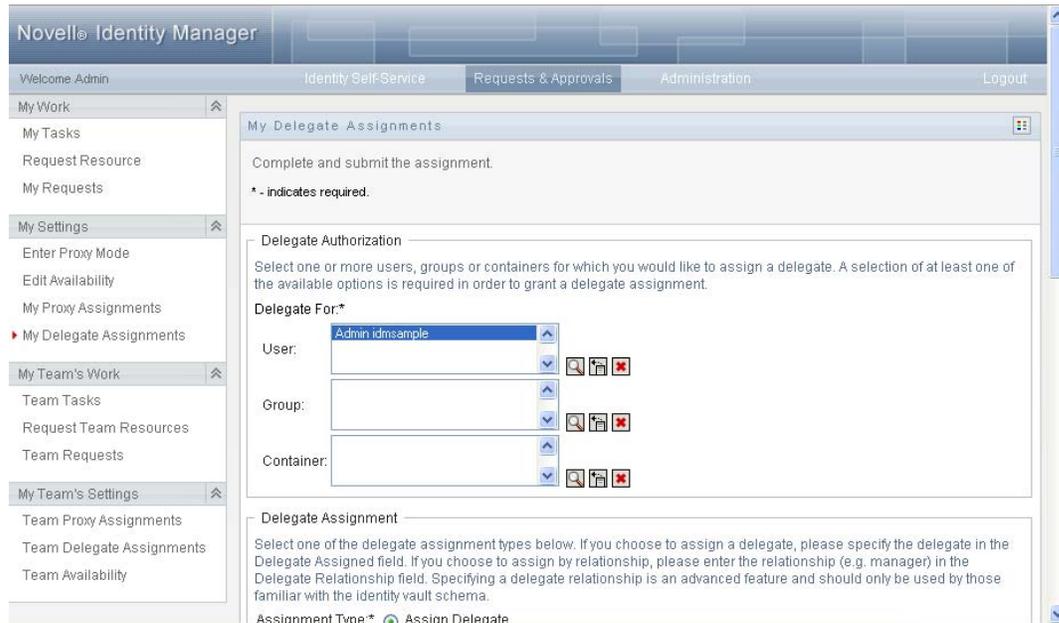
11.5.2 Creating or Editing Delegate Assignments

1 To edit an existing delegate assignment, click *Edit* next to the assignment:



Or, to create a new delegate assignment, click *New*.

If you are the Provisioning Application Administrator, the user application presents the following interface to allow you to define delegate assignments:



- 2 Select one or more users, groups, and containers for which you want to define a delegate. Use the *Object Selector* or the *Show History* tool to select a user, group, or container.
- 3 Click *Assign Delegate*. Specify the user who is the delegate in the *Delegate Assigned* field. Alternatively, click *Assign by Relationship*, then select a relationship in the *Delegate Relationship* field.
- 4 Specify when the time period ends by clicking one of the following:

Button	Description
<i>No Expiration</i>	Indicates that this delegate assignment does not expire.
<i>Specify Expiration</i>	Lets you specify the end date and time. You can type the date and time, or click the calendar button and select the date and time from the calendar.

- 5 Select the category of resource requests in the *Resource Search Criteria* field. Select *All* to include resource requests from all available categories.

- 6 Select one or more requests that you want to delegate in the *Available Requests in Selected Category* list, then click *Add*.

The screenshot shows a web interface titled "Request Type Selection". Below the title is a subtitle: "Select the types of requests for this delegate assignment. Select a Resource Category to display the available requests." There is a "Resource Search Criteria:" label followed by a dropdown menu set to "Entitlements". Below this is the label "Available Requests in Selected Category:" followed by a list box containing one item: "Enable Active Directory Account". Below the list box are two buttons: "Add" and "Remove". The "Add" button is highlighted with a yellow border and a mouse cursor is pointing at it. Below the buttons is the label "Selected Requests:*" followed by an empty list box.

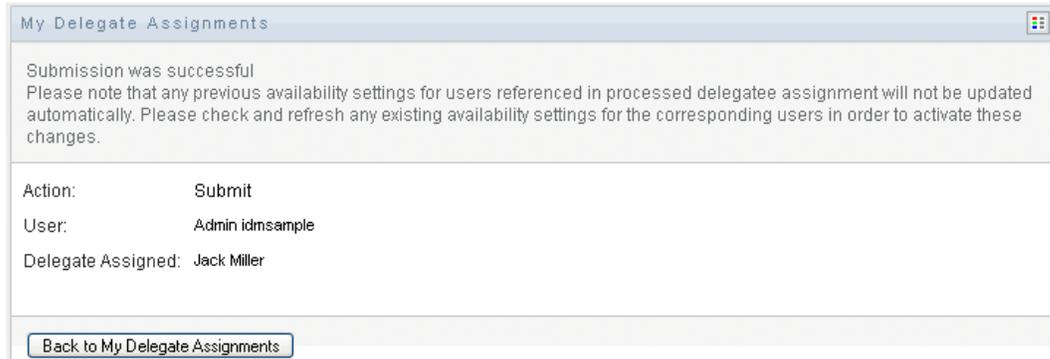
Each request you add is included in the *Selected Requests* list.

The screenshot shows the same web interface as above. The "Available Requests in Selected Category:" list box is now empty. The "Add" button is now disabled, indicated by a dashed border. The "Selected Requests:*" list box now contains one item: "Enable Active Directory Account".

If you add multiple requests, each request is treated as an individual object that can be edited separately.

- 7 To remove a request from the list, click *Remove*.
- 8 Click *Submit* to commit your changes.

The user application displays a confirmation message indicating whether the delegate assignment was successfully submitted:



11.5.3 Deleting a Delegate Assignment

To delete an existing delegate assignment:

- 1 Click *Remove* next to the assignment:



Managing Your Team's Work

12

This section describes how to use the *Requests & Approvals* tab to manage your team's provisioning work. Topics include:

- ◆ [Section 12.1, "About My Team's Work Actions," on page 151](#)
- ◆ [Section 13.2, "Viewing and Editing Your Team's Proxy Assignments," on page 181](#)
- ◆ [Section 12.3, "Make Team Requests," on page 170](#)
- ◆ [Section 12.4, "Managing Your Team's Requests," on page 176](#)

12.1 About My Team's Work Actions

The *Requests & Approvals* tab in the Identity Manager user application includes a group of actions called *My Team's Work*. The *My Team's Work* actions give you the ability to work with team member tasks and requests in a workflow. Some actions are the same as those described in [Chapter 10, "Managing Your Work," on page 113](#). The actions you can perform are determined by the definition of the team and the team request rights. The *Requests & Approvals* tab works with existing users and teams. To add new users and teams, refer to [Chapter 8, "Creating Users or Groups," on page 91](#).

NOTE: The flow of control for a provisioning workflow, as well as the appearance of forms, can vary depending on how the provisioning request was defined in the Designer for Identity Manager. For details on customizing the design of a provisioning workflow, see the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>).

12.1.1 About Teams

A *team* identifies a group of users. It determines who can manage provisioning requests and approval tasks associated with this team. The team definition consists of a list of team managers, team members, and team options, as described below:

- ◆ The *team managers* are those users who can administer requests and tasks for the team. Team managers can also be given permission to set proxies and delegates for team members. Team managers can be users or groups.
- ◆ The *team members* are those users who are allowed to participate on the team. Team members can be users, groups, or containers within the directory. Alternatively, they can be derived through directory relationships. For example, the list of members could be derived by the manager-employee relationship within the organization. In this case, the team members would be all users who report to the team manager.

NOTE: The Provisioning Application Administrator can configure the directory abstraction layer to support cascading relationships, in which case several levels within an organization might be included within a team. The number of levels to include is configurable by the administrator.

- ◆ The *team options* determine the provisioning request scope, which specifies whether the team can act on an individual provisioning request, one or more categories of requests, or all

requests. The team options also determine whether team managers can set proxies for team members and/or set the availability of team members for the purpose of delegation.

The Provisioning Application Administrator can perform all team management functions.

The team definition itself is managed within iManager by one or more administrative managers.

12.1.2 About Team Request Rights

The *team request rights* specify a list of requests that fall within the domain of a team, as well as the actions that team managers can perform on the provisioning requests and tasks.

The team request rights are managed within iManager by one or more administrative managers. The team manager is not permitted to set these rights.

Your administrator has the ability to define a scope of control for team managers depending on the business needs of the specific team. Because of this you might have different rights over requests and tasks, depending on the team for which you are acting as a manager. If you have questions about the access rights for a specific team, please contact your administrator.

12.2 Managing Your Team's Tasks

When a task is in a workflow queue, you can perform the following actions:

- ◆ [Section 12.2.1, “Viewing Tasks by Team Member,” on page 153](#)
- ◆ [Section 12.2.2, “Viewing Tasks by User or Group,” on page 154](#)
- ◆ [Section 12.2.3, “Using the Task Displays,” on page 156](#)
- ◆ [Section 12.2.4, “Selecting a Task,” on page 160](#)
- ◆ [Section 12.2.5, “Claiming a Task,” on page 165](#)
- ◆ [Section 12.2.6, “Reassigning a Task,” on page 169](#)
- ◆ [Section 12.2.7, “Releasing a Task,” on page 170](#)

12.2.1 Viewing Tasks by Team Member

A team manager can view a team member's tasks. Only tasks available to the team can be listed in the task list.

- 1 Click *Team Tasks* in the *My Team's Work* group of actions to display the Team Tasks window.

Novell Identity Manager

Welcome Margo | Identity Self-Service | Requests & Approvals | Logout | Help

My Work

- My Tasks
- Request Resource
- My Requests

My Settings

- Enter Proxy Mode
- Edit Availability
- My Proxy Assignments
- My Delegate Assignments

My Team's Work

- Team Tasks
- Request Team Resources
- Team Requests

My Team's Settings

- Team Proxy Assignments
- Team Delegate Assignments
- Team Availability

Team Tasks

Specify search criteria and select desired task list columns, then click on Search to get the task list.
* - Indicates required.

Select a team: *

User: *

Timeout: None

Filter By: * Recipient Assigned To

Task List Columns: *

Request Date	>	Task
Requested By	<	Request
Digital Signature	<	Recipient
		Type

Task	Request	Recipient	Type	Assigned To	Claimed	Timeout	# of t
Single Approval	Grant Conference Call Number	Allison Blake		Margo MacKenzie		1 Days 23 Hours 43 Min	

- 2 Click the *Select a team* down-arrow to display teams. Select a team for which you have been designated a team manager.

- 3 Select a user.

If the *User* selection box contains a name, click the *User* down-arrow to display all the members of the selected team. Click the name of the person whose tasks you want to display.

If the *User* selection box is empty, click the *Object Selector* icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

Your administrator defines your team and defines whether you see an automatically populated selection list or an empty list with an *Object Selector* icon beside the selection box.

- 4 (Optional) Specify a *Timeout* interval to find tasks that expire within the time you select. Specify one or more digits, for example 10.

If you specify a *Timeout* interval, choose whether the interval is days, weeks, or months.

- 5 Use *Filter by* to select the subset of tasks you want to see for a team member. To see tasks that grant or revoke resources for the team member, select *Recipient*. To see tasks that the team member is responsible for doing, select *Assigned to*. You can select both kinds of tasks.

- 6 In the *Task List Columns* selection box, select one or more task columns to display and click the right-arrow to add them to the task list. The order in which you select the columns is the order in which they appear in the display. Columns can include:

Task. (Required.)

Request

Recipient

Request Date
Type
Assigned to
Requested by
Claimed
Timeout
Priority
Digital Signature

- 7 Click *Search* to list the selected user's tasks.
- 8 To see another team member's tasks, or tasks for another team, return to **Step 2** and define a new search.

12.2.2 Viewing Tasks by User or Group

A Provisioning Application Administrator can view tasks by user or group.

- 1 Click *Team Tasks* in the *My Team's Work* group of actions to display the Team Tasks window.
- 2 For *Selection Type*, choose *User* or *Group*.

Team Tasks

Specify search criteria and select desired task list columns, then click on Search to get the task list.

* - indicates required.

Selection Type: User Group

User: *   

Timeout:: 

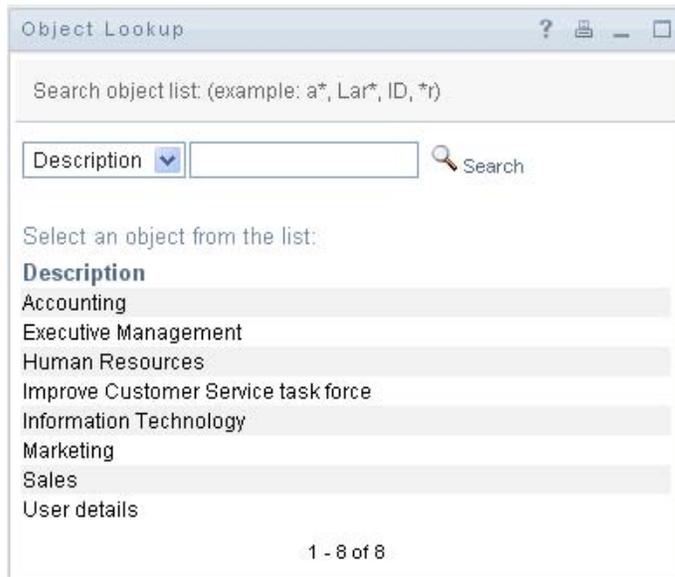
Filter By: * Recipient Assigned To

Task List Columns: *

Request Date	>	Task	▲
Requested By		Request	
Digital Signature	<	Recipient	
		Type	▼

- 3 To look up a name, click the *Object Selector* icon , specify lookup criteria, and click *Search*.

Click a user name or group name to select it. The following sample of the object lookup page was a lookup of all groups:



- 4 Optionally, specify a *Timeout* interval to find tasks that expire within the interval. Specify one or more digits.

If you specify a *Timeout* interval, choose whether the interval is days, weeks, or months.

- 5 Use *Filter by* to select a subset of tasks. To see tasks that grant or revoke resources to the user or group, select *Recipient*. To see tasks that the user or group is responsible for doing, select *Assigned to*. You can select both kinds of tasks.

- 6 In the *Task List Columns* selection box, select one or more task descriptions to display, then click the right-arrow to add the descriptions to the task list. The order in which you add the descriptions is the order in which they appear as column headers in the task list. Your choices are:

Task. (Required.)
Request
Recipient
Request Date
Type
Assigned to
Requested by
Claimed
Timeout
Priority
Digital Signature

- 7 Click *Search* to display the tasks.

Group tasks displayed are those explicitly assigned to the group, not those assigned to each member of the group. To see tasks assigned to an individual, view the tasks for that person.

- 8 To see tasks for another user or group, return to [Step 2](#) and define a new search.

12.2.3 Using the Task Displays

The task list appears in the Template Display or the Exhibit Display format. Your administrator chooses your display format.

The Template Display Format

The Template Display is the default display format. [Figure 12-1](#) shows an example:

Figure 12-1 Example of Task List in Template Display Format

of tasks per page

Task	Request	Recipient	Type	Assigned To	Claimed	Timeout
Single Approval	Grant Medical Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 39 Minut
Single Approval	Grant Expense System Access	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 43 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 35 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 42 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Allison Blake		Margo MacKenzie		1 Days 23 Hours 40 Minut
Single Approval	Grant SmartCard	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 44 Minut
Single Approval	Grant Gym	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 39 Minut
Single Approval	Grant Books7X24	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 36 Minut
Single Approval	Grant Dental Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 37 Minut
Single Approval	Grant Medical Insurance	Allison Blake		Margo MacKenzie		1 Days 23 Hours 41 Minut

1 - 10 of 16

The template display lets you sort columns by value, set the number of tasks per page, and page through the task list.

Sorting a Column by Value

- 1 Click the heading of a column to sort the values in the column.
- 2 Click the heading again to reverse the order of the sort.

Setting the Number of Tasks per Page

- 1 Click the down-arrow of the *# of tasks per page* selection box on the right side above the task list.
- 2 Choose a page length of 5, 10, or 25 tasks per page.

Paging Through the Task List

- 1 Click *First*, *Previous*, *Next*, and *Last* to page through the task list.

of tasks per page

Task	Request	Recipient	Assigned To	Timeout	Priority
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Margo MacKenzie	Timothy Swan	1 Days 22 Hours 8 Minutes	
Single Approval	Grant Cafeteria	Kevin Chester	Margo MacKenzie	1 Days 22 Hours 14 Minutes	
Single Approval	Grant Dependent Care	Allison Blake	Margo MacKenzie	1 Days 22 Hours 12 Minutes	
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Kevin Chester	Margo MacKenzie	1 Days 22 Hours 13 Minutes	
Single Approval	Grant Books7X24	Margo MacKenzie	Timothy Swan	1 Days 22 Hours 8 Minutes	

6 - 10 of 18

The Exhibit Display Format

The Exhibit Display format enables you to filter your retrieved data. [Figure 12-2](#) shows an example of the Exhibit Display format:

Figure 12-2 Example of Task List in Exhibit Display Format

Team Tasks

Revise Search

16 Tasks total Copy List to Clipboard

Task	Request	Recipient	Type	Assigned To	Claimed	Timeout	Priority	Request Date	Requested By	Digital Signature
Single Approval	Grant Medical Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 36 Minutes		0 Days 0 Hours 23 Minutes ago	Kevin Chester	
Single Approval	Grant Expense System Access	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 40 Minutes		0 Days 0 Hours 19 Minutes ago	Margo MacKenzie	
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 32 Minutes		0 Days 0 Hours 27 Minutes ago	Kevin Chester	
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 39 Minutes		0 Days 0 Hours 20 Minutes ago	Margo MacKenzie	

Task

16 ✓ Single Approval

Request

4 ✓ Enable Active Directory Account (Mgr Approve-No Timeout)

Assigned To

12 ✓ Margo MacKenzie

4 ✓ Timothy Swan

Sorting a Column by Value

- 1 Click the heading of a column to sort the values in the column.
- 2 Click the heading again to reverse the order of the sort.

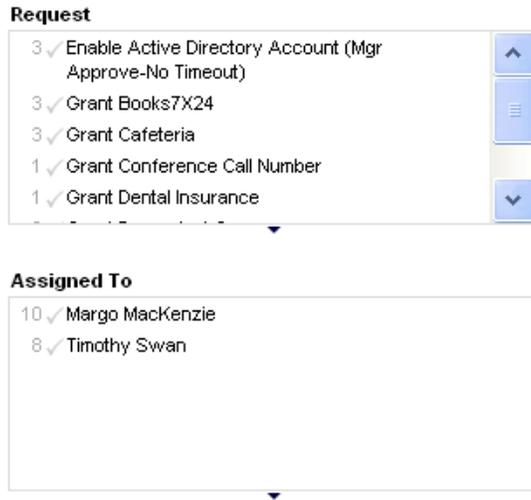
Filtering Your View of the Data

The Exhibit Display format shows the whole data set returned by your search. You can use filters to filter the data set. The filters are on the right side of the display and have the names of column headings from your search. You can filter the data by *Task*, *Request*, *Assigned To*, and *Requested By* column values. Filters only appear if the corresponding columns are included in the display.

NOTE: The Exhibit Display refers to filters as *facets*.

Figure 12-3 shows an example with a Request filter and an Assigned To filter:

Figure 12-3 Two Filters in the Exhibit Display



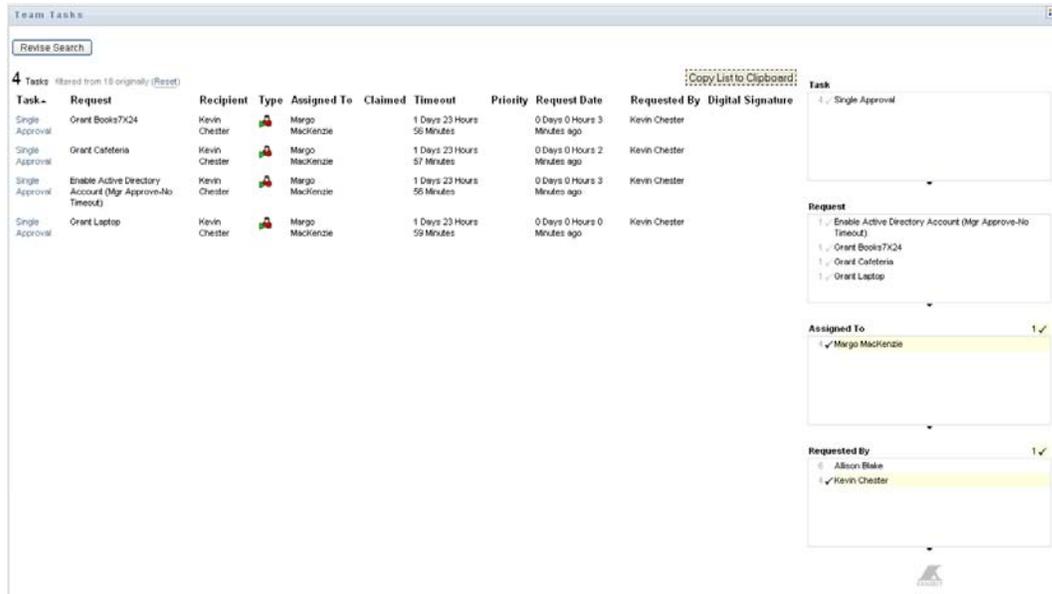
Beside each filter parameter is a number and optionally a check mark. The number indicates the number of tasks that match that parameter within the current filter set. The check mark indicates whether the filter parameter is selected. Initially, all filter parameters are selected, enabling you to see all the data from your search. If a filter has only one parameter, that parameter is automatically selected.

- 1 To view a subset of data, click one or more parameters in one or more filter boxes.

NOTE: Selecting a parameter in one filter can change the parameters available in other filters.

For example, if you click Margo’s name in the Assigned To filter and Kevin’s name in the Requested By filter, you see only tasks that are both assigned to Margo Mackenzie and requested by Kevin Chester, as shown in [Figure 12-4](#):

Figure 12-4 Example of Task List After Applying Two Filters



Exporting Data from Your Display

- 1 To export the data that you see in your display, click *Copy List to Clipboard* (at the top of the display).
- 2 Choose *Tab Separated Values* or *Generated HTML of this view*. The Exhibit Display generates a coded text file.
- 3 Copy the contents to your clipboard.
- 4 Paste from your clipboard to a destination file.
- 5 Click *Close* or *ESC* to close the window of coded text.

Understanding the Display Icons

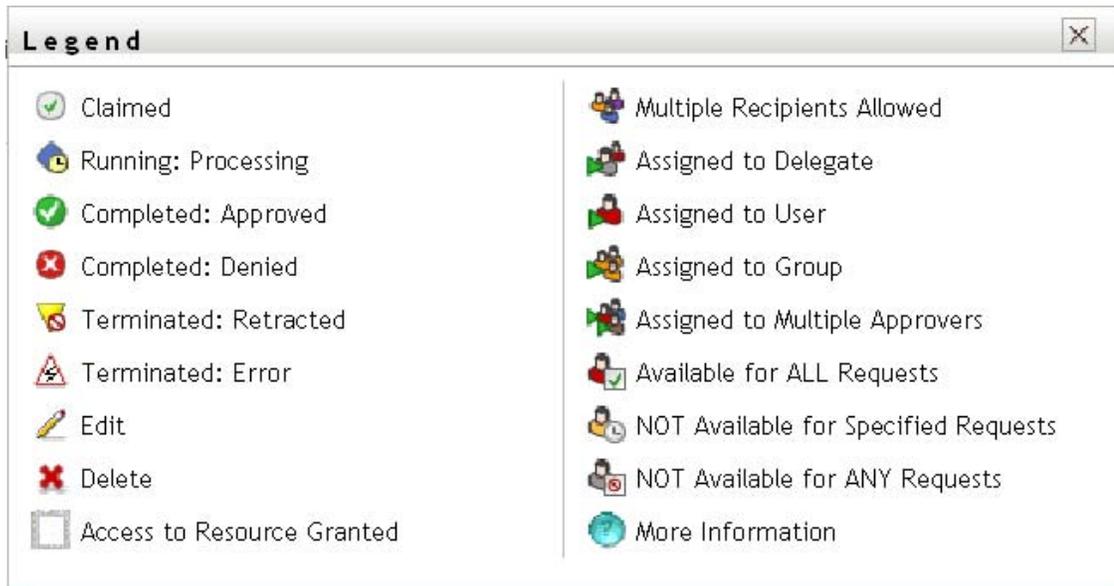
The Template and Exhibit views both show icons that indicate the status of each task in the result set. This section describes the display icons that appear in the task list:

- ◆ “Type Column” on page 159
- ◆ “Priority Column” on page 160
- ◆ “Claimed Column” on page 160
- ◆ “Digital Signature Column” on page 160

Type Column

Status flags appear under the *Type* column. Flags are defined in the Legend. To access the Legend, click the multicolored icon in the right side of the Team Tasks title bar. [Figure 12-5 on page 160](#) shows the Legend.

Figure 12-5 Icons that appear in the Team Tasks displays



Priority Column

A red flag identifies a high-priority task. This priority is set in the Provisioning Request Definition created by your administrator.

Claimed Column

The *Claimed* icon in the *Claimed* column indicates that the task has been claimed.

Digital Signature Column

The *Digital Signature* icon in the *Digital Signature* column indicates that a digital signature is required to approve or deny the task.

12.2.4 Selecting a Task

To select and open a task in the task list:

- 1 Click the name of the task.

The Team Tasks Task Detail form is displayed.

Team Tasks

Task Detail

* - indicates required.

Resource: Sale group membership 2 step TD Recipient: Allison Blake
Requested By: Allison Blake Task: First approval
In Queue since: 06/05/2007 03:05:06 PM Timeout on: 06/08/2007 03:05:06 PM
Assigned To: Timothy Swan Claimed By:

Form Detail

First approval
Please select the appropriate button to approve or reject the request.

Requested by: Allison Blake Recipient: Allison Blake
Request Date: 06/05/2007
Reason:
Comment:

When a task is assigned to multiple approvers, the Task Detail form displays the *Multiple Approvers* icon next to the *Assigned To* field, and displays text below the icon to indicate that multiple approvals are necessary.

Team Tasks

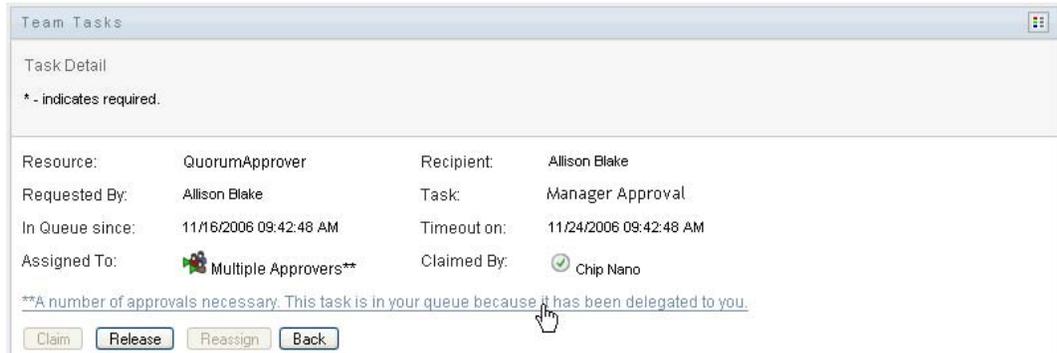
Task Detail

* - indicates required.

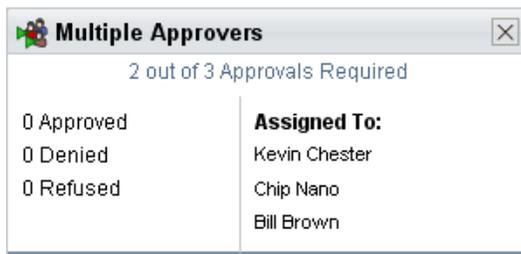
Resource: QuorumApprover Recipient: Allison Blake
Requested By: Allison Blake Task: Manager Approval
In Queue since: 11/16/2006 09:42:48 AM Timeout on: 11/24/2006 09:42:48 AM
Assigned To: Multiple Approvers** Claimed By:

**A number of approvals necessary. This task is in your queue because it has been delegated to you.

- To display more information about a task assigned to multiple approvers, click the text under the *Multiple Approvers* icon:



A pop-up window displays that indicates how many approvals are required, who the current addressees are, and what the approval status is currently.



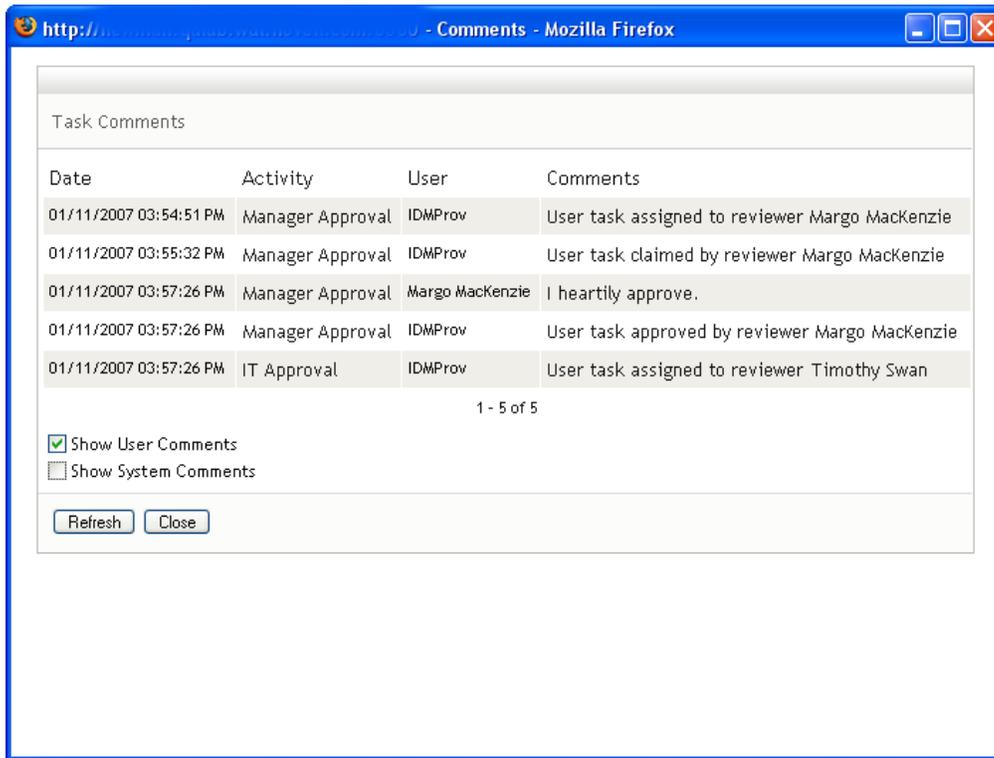
The requirements for the task depend on how the task was configured by your administrator:

- ◆ If the approval type is *group*, the task has been assigned to several users within a group, but only one is expected to claim and approve the task.
- ◆ If the approval type is *multiple approvers*, the task has been assigned to several addressees, and all of the addressees must claim and approve the task.
- ◆ If the approval type is *quorum*, the task has been assigned to several addressees, and a quorum of addressees is sufficient to approve the task. The definition of a quorum is configured by the administrator. To define the quorum, the administrator specifies an approval condition that specifies the precise number of approvals or the percentage of approvals needed.

- To claim a task, follow the instructions at [Section 12.2.5, “Claiming a Task,” on page 165](#).
- To reassign a task, follow the instructions at [Section 12.2.6, “Reassigning a Task,” on page 169](#)
- To view comment history for the task, click *View Comment History*.

A pop-up window lets you see user and system comments. The order in which comments appear is determined by the time stamp associated with each comment. Comments entered first are displayed first. For parallel approval flows, the order of activities being processed concurrently can be unpredictable.

5a To display user comments, click *Show User Comments*.

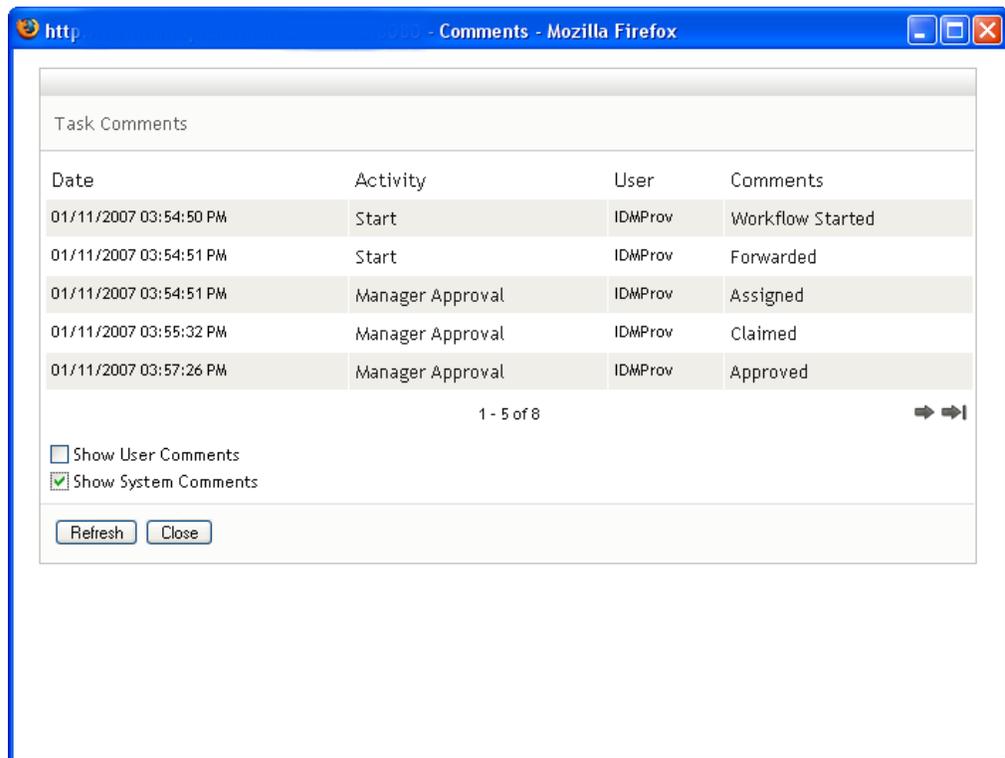


User comments include the following kinds of information:

- ♦ The date and time when each comment was added.
- ♦ The name of the activity to which each comment applies. The list of activities displayed includes user and provisioning activities that have been processed or are currently being processed.
- ♦ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMProv`) is the user name. Comments generated by the workflow system are localized automatically.
- ♦ The comment text, which includes the name of the user who is the current assignee for each activity.

NOTE: The workflow designer can disable the generation of user comments for a workflow. For more information, see the *Identity Manager User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>).

5b To display system comments, click *Show System Comments*.



System comments include the following kinds of information:

- ♦ The date and time when each comment was added.
- ♦ The name of the activity to which each comment applies. When you display system comments, all activities in the workflow are listed. The list of activities includes those that have been processed or are currently being processed.
- ♦ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMProv`) is the user name. Comments generated by the workflow system are localized automatically.
- ♦ The comment text, which indicates what action was taken for the activity.

System comments are intended primarily for debugging purposes. Most business users do not need to look at the system comments for a workflow.

5c To scroll through a long list of comments, click the arrows at the bottom of the screen. For example, to scroll to the next page, click the *Next* arrow.



5d Click *Close* to close the window.

6 To return to the task list, click *Back*.

NOTE: The *Claim* and *Reassign* buttons are visible only if these actions are permitted by the team request rights.

12.2.5 Claiming a Task

To claim a team member's task to work on:

- 1 Click *Claim*.

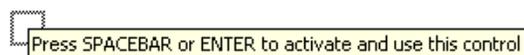
The screenshot shows a web application window titled "Team Tasks". The "Task Detail" section includes a note: "* - indicates required." Below this, task information is displayed in two columns: Resource (Enable Active Directory Account), Recipient (Allison Blake), Requested By (Margo MacKenzie), Task (Manager Approval), In Queue since (12/06/2006 01:07:45 PM), and Timeout on (12/08/2006 01:07:45 PM). The "Assigned To" field shows Margo MacKenzie with a user icon, and "Claimed By" is empty. Action buttons for "Claim", "Release", "Reassign", and "Back" are visible, with a mouse cursor over "Claim". Below is the "Form Detail" section, titled "Manager Approval", with instructions: "Please select the appropriate button to approve or reject the request." It shows "Requested by: Margo MacKenzie" and "Recipient: Allison Blake". The "Request Date" is 12/06/2006. The "Reason" field contains the text "test". A "Comment" field is present but empty.

The *Form Detail* section of the page is updated to include the *Deny* and *Approve* buttons, as well as any other action buttons included by the flow definition, and the appropriate fields become editable.

If the resource you've requested requires a digital signature, the Digital Signature Required icon appears in the upper right corner of the page.



In addition, on Internet Explorer, a message appears indicating that you need to press the Spacebar or the Enter key to activate the digital signature applet.



- 2 If you're working on a task that requires a digital signature, perform these steps:
 - 2a If you're using a smart card, insert the smart card into the smart card reader.

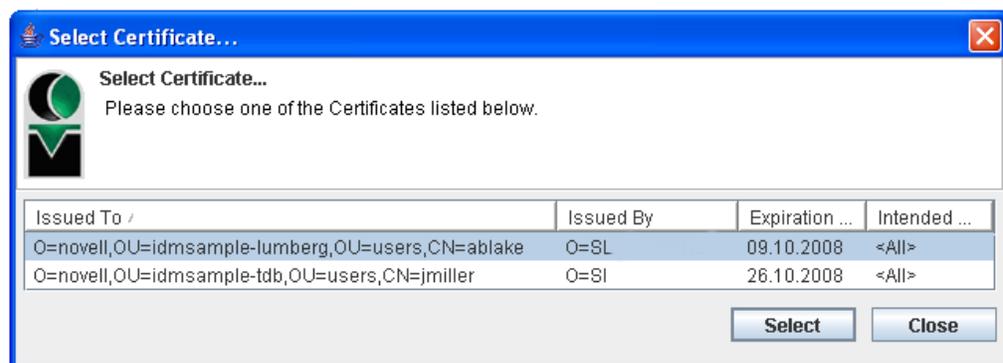
- 2b** On Internet Explorer, press the Spacebar or the Enter key to activate the applet. At this point, your browser might display a security warning message.



- 2c** Click *Run* to proceed.
- 2d** Fill in the fields in the approval form. The fields on the form vary depending on which resource you requested.
- 2e** Click the check box next to the digital signature confirmation message to indicate that you are ready to sign.

The digital signature confirmation message varies depending on how the provisioning resource was configured by the administrator.

The applet then displays a pop-up window that allows you to select a certificate. The pop-up window lists certificates imported to the browser as well as certificates imported to the smart card (if one is currently connected).



2f Select the certificate you want to use and click *Select*.



2g If you select a certificate that has been imported into your browser, you need to type the password for the certificate in the *Password* field on the request form.

2h If you select a certificate that has been imported to your smart card, type the PIN for your smart card and click *OK*.

You do not need to type the password for the certificate if you're using a smart card, because the certificate password has already been transmitted to the card.



If your administrator has enabled the ability to preview the user agreement, the *Preview* button is enabled.

2i Click *Preview* to see the user agreement.

If the digital signature type is set to Form, a PDF document is displayed.

If the digital signature type is set to data, an XML document is displayed.

3 To deny the request, click *Deny*.

Form Detail

Manager Approval

Please select the appropriate button to approve or reject the request.

Requested by: Margo MacKenzie Recipient: Allison Blake

Request Date: 12/06/2006

Reason: test

Comment:

View Comment History

Deny Approve

A screenshot of a web application interface for 'Manager Approval'. The form contains fields for 'Requested by' (Margo MacKenzie), 'Recipient' (Allison Blake), 'Request Date' (12/06/2006), 'Reason' (test), and 'Comment'. At the bottom, there are three buttons: 'View Comment History', 'Deny', and 'Approve'. A mouse cursor is pointing at the 'Deny' button.

4 To approve the request, click *Approve*.

Form Detail

Manager Approval

Please select the appropriate button to approve or reject the request.

Requested by: Margo MacKenzie Recipient: Allison Blake

Request Date: 12/06/2006

Reason: test

Comment:

View Comment History

Deny Approve

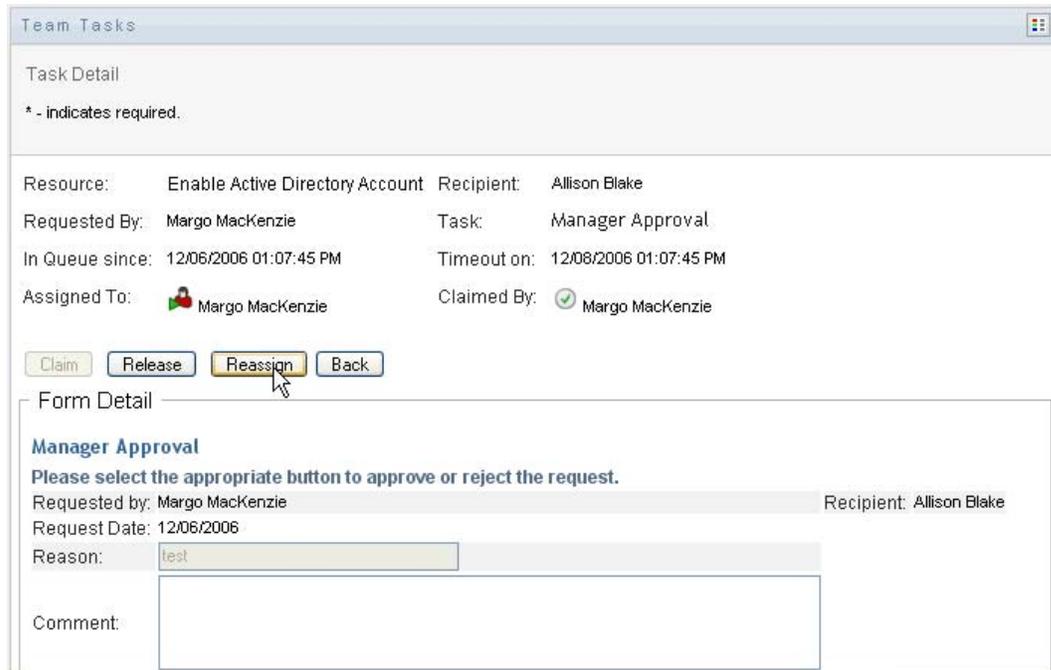
A screenshot of the same 'Manager Approval' form. In this view, a mouse cursor is pointing at the 'Approve' button.

The user application displays a message indicating whether the action was successful.

12.2.6 Reassigning a Task

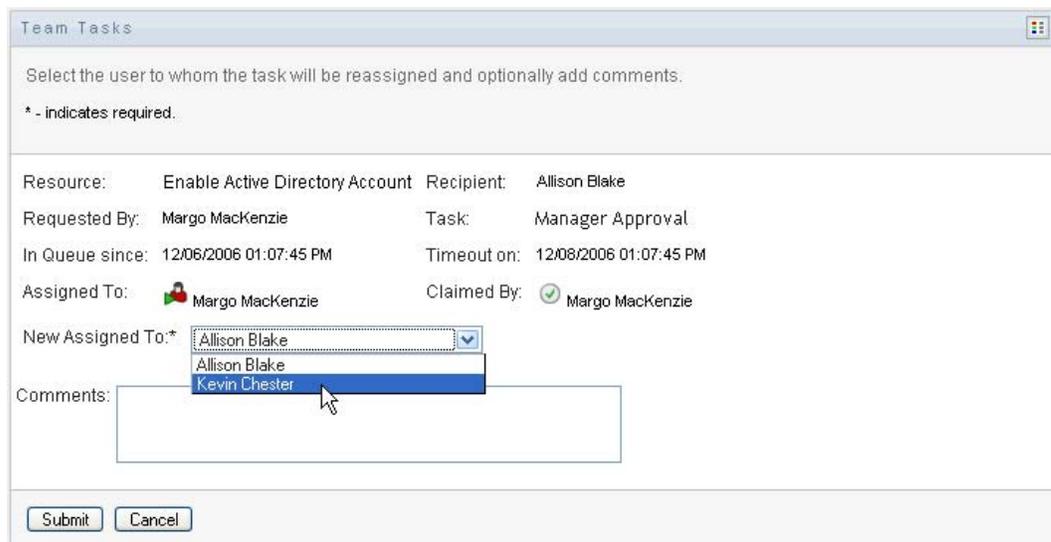
To reassign a team member's task:

- 1 Click *Reassign* in the Team Tasks task detail window.



The screenshot shows the 'Team Tasks' window with the 'Task Detail' section. The task is 'Enable Active Directory Account' for 'Allison Blake', requested by 'Margo MacKenzie'. The 'Reassign' button is highlighted with a mouse cursor. Below the task details are buttons for 'Claim', 'Release', 'Reassign', and 'Back'. The 'Form Detail' section shows 'Manager Approval' with a 'Please select the appropriate button to approve or reject the request.' instruction. It includes fields for 'Requested by: Margo MacKenzie', 'Request Date: 12/06/2006', 'Reason: test', and a 'Comment' field.

- 2 Click the *Object Selector* icon  next to your chosen entry box.
- 3 In the *New Assigned To* drop-down list, select the user to whom you want to reassign the task.



The screenshot shows the 'Team Tasks' window with the 'New Assigned To' drop-down list open. The list contains 'Allison Blake' and 'Kevin Chester', with 'Kevin Chester' selected. The 'Comments' field is empty. The 'Submit' and 'Cancel' buttons are visible at the bottom.

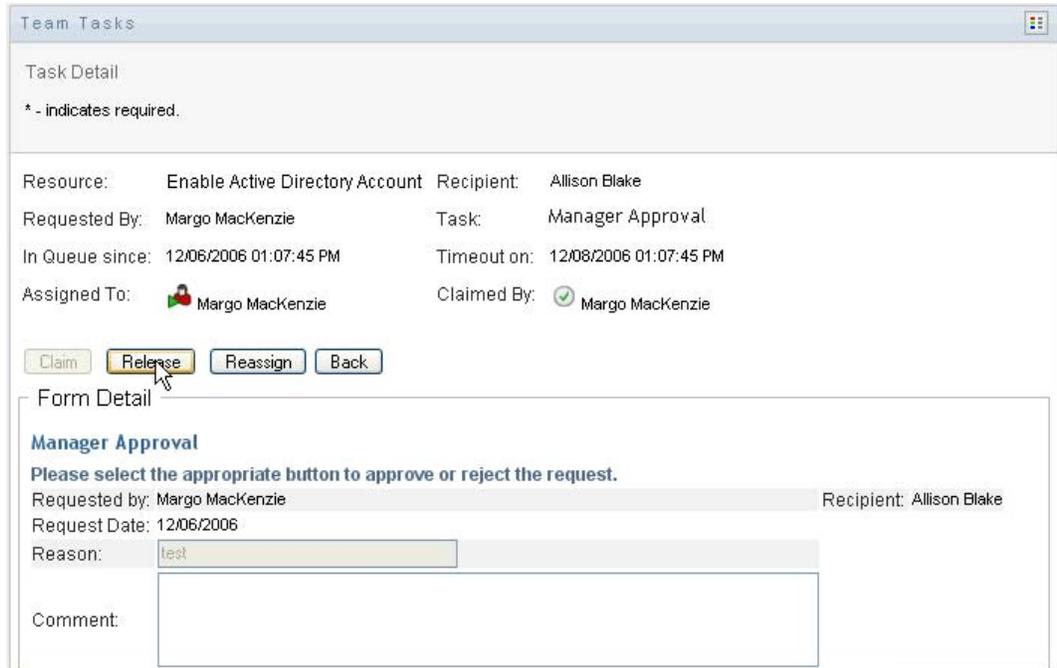
- 4 (Optional) Type a comment in the *Comments* field to explain the reason for the reassignment.
- 5 Click *Submit*.

The user application displays a message indicating whether the action was successful.

12.2.7 Releasing a Task

You release a task so that it can be assigned to or claimed by another team member.

- 1 Click *Release* in the Team Tasks Task Detail window.



The screenshot shows a web application window titled "Team Tasks". Inside, there is a "Task Detail" section with a note: "* - indicates required." Below this, task information is displayed in two columns:

Resource:	Enable Active Directory Account	Recipient:	Allison Blake
Requested By:	Margo MacKenzie	Task:	Manager Approval
In Queue since:	12/06/2006 01:07:45 PM	Timeout on:	12/06/2006 01:07:45 PM
Assigned To:	 Margo MacKenzie	Claimed By:	 Margo MacKenzie

Below the task information are four buttons: "Claim", "Release", "Reassign", and "Back". A mouse cursor is pointing at the "Release" button.

Underneath the buttons is a "Form Detail" section for "Manager Approval". It contains the following text and fields:

Manager Approval
Please select the appropriate button to approve or reject the request.

Requested by: Margo MacKenzie Recipient: Allison Blake
Request Date: 12/06/2006
Reason:
Comment:

12.3 Make Team Requests

The *Request Team Resources* action enables you to request resources for team members.

- 1 Click *Request Team Resources* in the *My Team's Work* group of actions.

The Request Team Resources page is displayed.



Novell Identity Manager

Welcome Margo

Identity Self-Service | Requests & Approvals | Administration | Logout | Help

My Work

- My Tasks
- Request Resource
- My Requests

My Settings

- Enter Proxy Mode
- Edit Availability
- My Proxy Assignments
- My Delegate Assignments

My Team's Work

- Team Tasks
- Request Team Resources**
- Team Requests

My Team's Settings

- Team Proxy Assignments
- Team Delegate Assignments
- Team Availability

Request Team Resources

Select a team

* - indicates required.

Select a team:* MyTeam

Continue

- 2 Click *Select a team* to select a team for which you have been designated as a team manager. Then click *Continue*.

The application displays a page that lets you pick a category.



Novell Identity Manager

Welcome Margo

Identity Self-Service | Requests & Approvals | Administration | Logout | Help

My Work

- My Tasks
- Request Resource
- My Requests

My Settings

- Enter Proxy Mode
- Edit Availability
- My Proxy Assignments
- My Delegate Assignments

My Team's Work

- Team Tasks
- Request Team Resources**
- Team Requests

My Team's Settings

- Team Proxy Assignments
- Team Delegate Assignments
- Team Availability

Request Team Resources

Step 1 of 4: Select the category of the resource you are requesting.

Resource Search Criteria: All

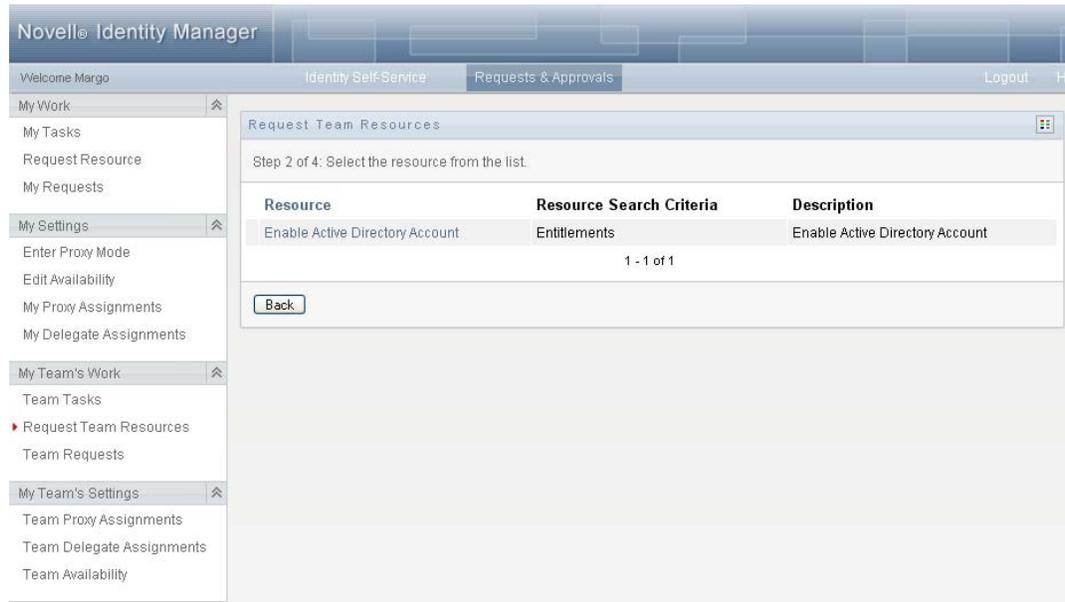
Continue

- 3 Select the category of the resource in the *Resource Search Criteria* drop-down list. Select *All* to include resources from all available categories.

The list of categories available depends on the team request rights. If the provisioning request scope for the team does not include resource categories, the category list is not displayed. In this case, skip to the next step to select a resource.

- 4 Click *Continue*.

The Request Team Resources page displays a list of resources that you can request. The list includes only those resources for which team managers are permitted to initiate requests.



- 5 Click a resource name to select it.
- 6 Click a *Recipient* name to select it. The team member you select is the recipient for the request. Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Recipient* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

If the *flow strategy* for the workflow has been defined to support multiple recipients, the application lets you pick a group, container, or team as the recipient. Depending on how the workflow is configured, the user application might spawn a separate workflow for each recipient (so that the request can be approved or denied independently for each recipient), or initiate a single flow that includes multiple provisioning steps, one for each recipient. In the latter case, the approval or denial of the request applies to all recipients.
- 7 Click *Continue*.
- 8 The Request Team Resources page displays the request form. Fill in the fields on the request form. In the following example, the only required field is *Reason for request*.

The fields on the form vary according to the resource you requested.

Novell® Identity Manager

Welcome Margo Identity Self-Service Requests & Approvals Logout

Request Team Resources

Step 4 of 4: Confirm and complete resource request.
*- indicates required.

Resource: Enable Active Directory Account
Recipient(s): Allison Blake
Resource Search Criteria: Entitlements
Description: Enable Active Directory Account

Form Detail

Enable Active Directory Account
Press "Submit" to request the entitlement.

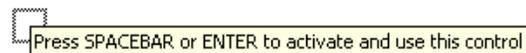
Recipient: Allison Blake
Reason for request: *

Submit Cancel

If the resource you've requested requires a digital signature, the *Digital Signature Required* icon appears in the upper right corner of the page.



In addition, on Internet Explorer, a message appears indicating that you need to press the Spacebar or the Enter key to activate the digital signature applet:



- 9 If you're making a request that requires a digital signature, perform these steps:
 - 9a If you're using a smart card, insert the smart card into the smart card reader.
 - 9b On Internet Explorer, press the Spacebar or the Enter key to activate the applet.

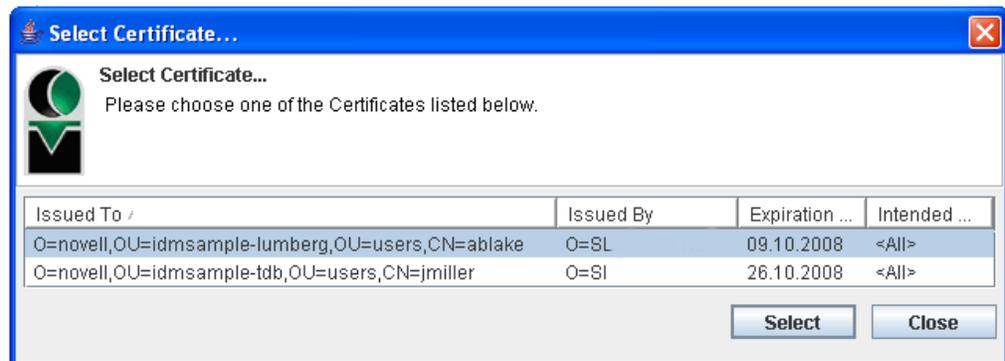
At this point, your browser might display a security warning message.



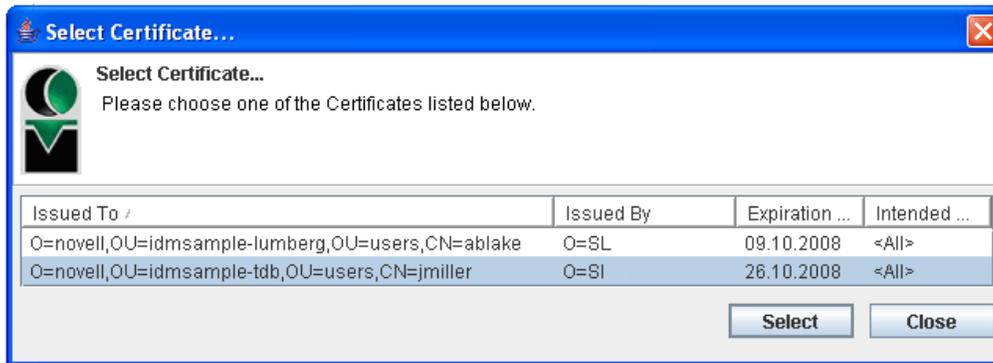
- 9c Click *Run* to proceed.
- 9d Fill in the fields in the initial request form. The fields on the form vary depending on which resource you requested.
- 9e Click the check box next to the digital signature confirmation message to indicate that you are ready to sign.

The digital signature confirmation message varies depending on how the provisioning resource was configured by the administrator.

The applet then displays a pop-up window that allows you to select a certificate. The pop-up window lists certificates imported to the browser as well as certificates imported to the smart card (if one is currently connected).



9f Select the certificate you want to use and click *Select*.



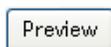
9g If you select a certificate that has been imported into your browser, you need to type the password for the certificate in the *Password* field on the request form.

9h If you select a certificate that has been imported to your smart card, type the PIN for your smart card and click *OK*.

You do not need to type the password for the certificate if you're using a smart card, because the certificate password has already been transmitted to the card.



If your administrator has enabled the ability to preview the user agreement, the *Preview* button is enabled.



9i Click *Preview* to see the user agreement.

If the digital signature type is set to Form, a PDF document is displayed. If the digital signature type is set to data, an XML document is displayed.

10 Click *Submit*.

A workflow starts for the user.

The Request Team Resources page displays a status message indicating whether the request was submitted successfully.

If your request requires permission from one or more individuals in an organization, the request starts one or more workflows to obtain those approvals.

12.4 Managing Your Team's Requests

Team managers and the Provisioning Application Administrator can view status and history of resource requests and can retract resource requests.

- 1 Click *Team Requests* in the *My Team's Work* group of actions.
- 2 Click *Select a team* to select a team for which you have been designated as a team manager.

If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

The Provisioning Application Administrator cannot filter the list of team requests by container or group. The administrator must select team members individually.

The screenshot shows the Novell Identity Manager interface. The top navigation bar includes 'Identity Self-Service', 'Requests & Approvals', and 'Administration'. The left sidebar shows a tree view with 'My Team's Work' expanded to 'Team Requests'. The main content area is titled 'Team Requests' and contains the text 'Select a team' and '* - indicates required.'. Below this is a dropdown menu labeled 'Select a team:*' with 'MyTeam' selected. A 'Continue' button is at the bottom of the form.

- 3 Click *Continue*.

The Request Team Resources page prompts you to select a *Team Member*, a *Resource Search Criteria* (a category), and a *Request Date* filter.

The screenshot shows the 'Team Requests' page with the following fields: 'Team Member:*' dropdown set to 'Allison Blake', 'Resource Search Criteria' dropdown set to 'All', and 'Request Date' dropdown set to 'before' with an adjacent empty text box and a calendar icon. A 'Continue' button is located at the bottom of the form.

- 4 Click a *Team Member* name to select it.

Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

- 5 After you select a team member, you can select the *Resource Search Criteria* (category) and a *Request Date* filter. Click *Continue*.

The Team Requests page lists:

- ◆ Each requested resource
- ◆ Who is to receive it
- ◆ Who requested it
- ◆ Status of the request

The team requests are displayed. The list of requests includes only those requests available to the team.



Resource	Recipient	Requested By	Status
TDBQuorum2	Kevin Chester	Margo Mackenzie	 Running: Processing

1 - 1 of 1

- 6 To view the details of a resource request, click the request name in the list.

The Request Detail page displays details such as

- ◆ Name of resource
- ◆ Recipient of resource
- ◆ Status of activities supporting the request
- ◆ Who requested the resource
- ◆ When the request was made
- ◆ Comments

Team Requests

Request Detail

Resource: TDBQuorum2

Recipient: Kevin Chester

Status of Activities: Processing

Requested By: Margo MacKenzie

Request Date: 12/06/2006 03:54:17 PM

Comments: [View Comment and Flow History](#)

[Back](#) [Retract](#)

7 To view comment history for the request, click *View Comment and Flow History*.

A pop-up window lets you see user and system comments. The order in which comments appear is determined by the time stamp associated with each comment. Comments entered first are displayed first. For parallel approval flows, the order of activities being processed concurrently can be unpredictable.

7a To display user comments, click *Show User Comments*.

http://... - Comments - Mozilla Firefox

Task Comments

Date	Activity	User	Comments
01/11/2007 03:54:51 PM	Manager Approval	IDMProv	User task assigned to reviewer Margo MacKenzie
01/11/2007 03:55:32 PM	Manager Approval	IDMProv	User task claimed by reviewer Margo MacKenzie
01/11/2007 03:57:26 PM	Manager Approval	Margo MacKenzie	I heartily approve.
01/11/2007 03:57:26 PM	Manager Approval	IDMProv	User task approved by reviewer Margo MacKenzie
01/11/2007 03:57:26 PM	IT Approval	IDMProv	User task assigned to reviewer Timothy Swan

1 - 5 of 5

Show User Comments
 Show System Comments

[Refresh](#) [Close](#)

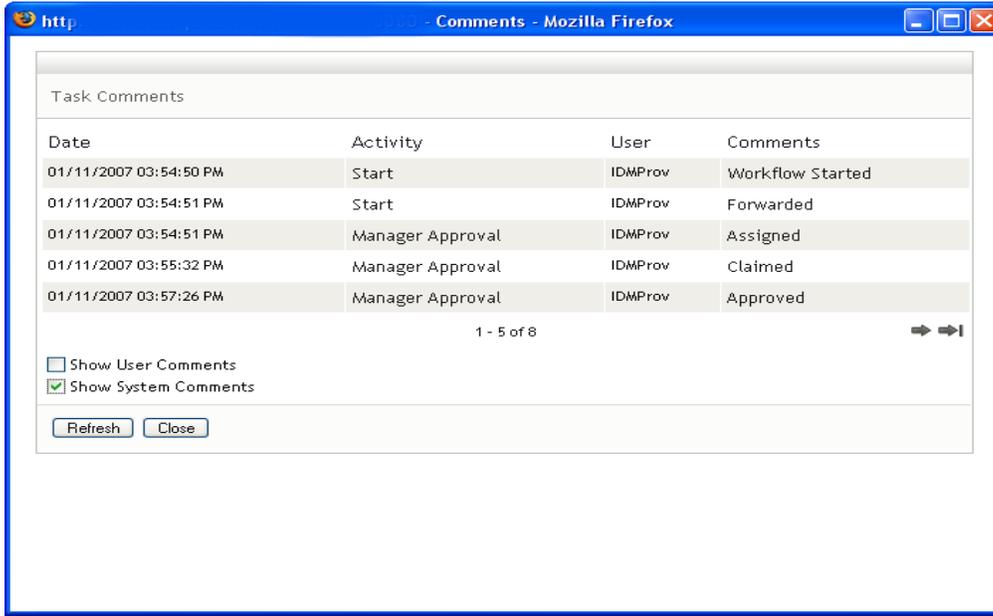
User comments include the following kinds of information:

- ◆ The date and time when each comment was added.
- ◆ The name of the activity to which each comment applies. The list of activities displayed includes user and provisioning activities that have been processed or are currently being processed.
- ◆ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMProv`) is the user name. Comments generated by the workflow system are localized automatically.

- ◆ The comment text, which includes the name of the user who is the current assignee for each activity.

The workflow designer can disable the generation of user comments for a workflow. For more information, see the *Identity Manager User Application: Design Guide*. (<http://www.novell.com/documentation/idm35/index.html>)

7b To display system comments, click *Show System Comments*.



System comments include the following kinds of information:

- ◆ The date and time when each comment was added.
- ◆ The name of the activity to which each comment applies. When you display system comments, all activities in the workflow are listed. The list of activities includes those that have been processed or are currently being processed.
- ◆ The name of the user who made the comment. If the comment is generated by the workflow system, the name of the application (for example, `IDMPROV`) is the user name. Comments generated by the workflow system are localized automatically.
- ◆ The comment text, which indicates what action was taken for the activity.

System comments are intended primarily for debugging purposes. Most business users do not need to look at the system comments for a workflow.

7c To scroll through a long list of comments, click the arrows at the bottom of the screen. For example, to scroll to the next page, click the *Next* arrow.



7d Click *Close* to close the window.

8 To retract the request, click *Retract* on the Request Detail page. *Retract* is enabled for running processes. In processes that are no longer running, *Retract* is disabled.

The *Retract* button is not displayed unless team managers have been given permission to retract requests in the team request rights.

Configuring Your Team's Provisioning Settings

13

This section tells you how to use the *My Team's Settings* actions on the *Requests & Approvals* tab of the Identity Manager user interface. Topics include:

- ◆ [Section 13.1, “About the My Team's Settings Actions,” on page 181](#)
- ◆ [Section 13.2, “Viewing and Editing Your Team's Proxy Assignments,” on page 181](#)
- ◆ [Section 13.3, “Viewing and Editing Your Team's Delegate Assignments,” on page 185](#)
- ◆ [Section 13.4, “Specifying Your Team's Availability,” on page 190](#)

13.1 About the My Team's Settings Actions

The *Requests & Approvals* tab in the Identity Manager user application includes a group of actions called *My Team's Settings*. The *My Team's Settings* actions let you:

- ◆ Create, view, and modify the current proxy assignments for your team.
- ◆ Create, view, and modify the current delegate assignments for your team.
- ◆ Define and view team members' availability for delegate assignments.

13.2 Viewing and Editing Your Team's Proxy Assignments

The *Team Proxy Assignments* action lets you manage the proxy assignment for any of your team members. The rules for defining proxies are:

- ◆ If you are the team manager, you might be allowed to define proxies for the members of your team. The authority to define proxies is determined by the team definition.
- ◆ The people whom you specify as proxies must also be within your team.
- ◆ The Provisioning Application Administrator has the ability to set proxies for any user, group, or container in the organization.

To assign a proxy for a team member:

- 1 Click *Team Proxy Assignments* in the *My Team's Settings* group of actions.



Novell Identity Manager

Welcome Margo

Identity Self-Service | Requests & Approvals | Administration | Logout | Help

My Work

- My Tasks
- Request Resource
- My Requests

My Settings

- Enter Proxy Mode
- Edit Availability
- My Proxy Assignments
- My Delegate Assignments

My Team's Work

- Team Tasks
- Request Team Resources
- Team Requests

My Team's Settings

- Team Proxy Assignments**
- Team Delegate Assignments
- Team Availability

Team Proxy Assignments

Select a team

* - indicates required.

Select a team:* MyTeam

Continue

- 2 Click *Select a team* to select a team for which you have been designated as a team manager.

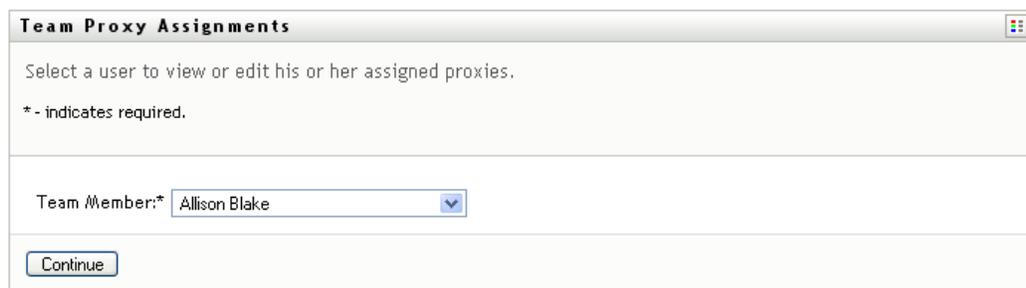
If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

The list of teams includes teams for which team managers are permitted to set proxies, as well as teams for which the ability to set proxies has been disabled. If a particular team definition does not permit team managers to set proxies, the manager can still view proxy settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit these settings, view details for these settings, or create new proxy assignments.

- 3 Click *Continue*.

- 4 Click a *Team Member* name to select it.

Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.



Team Proxy Assignments

Select a user to view or edit his or her assigned proxies.

* - indicates required.

Team Member:* Allison Blake

Continue

- 5 Click *Continue*.

The proxy assignments for the selected team member, if any, are displayed. You can sort the proxy assignments by clicking the *Proxy Assigned* field.

6 Click *New*.

The *New* button is only enabled for those teams for which team managers are permitted to set proxies for team members.

7 Fill in the fields as follows:

Field	Description
<i>User</i>	Select the team member for whom you want to assign a proxy. You can select multiple users.
<i>Proxy Assigned</i>	Select the team member who is to act as proxy.
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this proxy assignment.
<i>Addressee</i>	Specifies which users should receive e-mail notifications: All: Specifies that the user assigned as proxy, as well as the team member(s) for whom the proxy has been assigned, receives e-mail notifications. Assign From: Specifies that only the team member(s) for whom the proxy has been assigned receives an e-mail notification. Assign To: Specifies that only the team member who is to act as proxy receives an e-mail notification. Selective: Allows you to send e-mail notifications to any users you select, including users who are not on the team.
<i>Expiration</i>	No Expiration: Select <i>No Expiration</i> if you want the proxy assignment to remain in effect until it is removed or modified. Specify Expiration: Select <i>Specify Expiration</i> to define an <i>End Date</i> . Click the Calendar and select a date and time when the proxy assignment expires.

8 Click *Submit* to save your selections.

If the assignment is successful, you'll see a message like this:

```
Submission was successful
Changes will be reflected upon the assigned's next login.
```

9 Click *Back to Team Proxy Assignments* to create a new or edit an existing proxy assignment.

To change existing proxy assignments:

1 Click *Team Proxy Assignments* in the *My Team's Settings* group of actions.

2 Click *Select a team* to select a team for which you have been designated as a team manager.

The list of teams includes teams for which team managers are permitted to set proxies, as well as teams for which the ability to set proxies has been disabled. If a particular team definition does not permit team managers to set proxies, the manager can still view proxy settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit these settings, view details for these settings, or create new proxy assignments.

If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

3 Click *Continue*.

4 Click a *Team Member* name to select it.

Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

5 Click *Continue*.

The proxy assignments for the selected team member, if any, are displayed.

6 To change a proxy assignment, click the edit button next to the assignment you want to modify.



If the team definition does not permit team managers to set proxies, the edit button is disabled.

7 Fill in the fields as follows:

Field	Description
<i>User</i>	Select the team member for whom you want to assign a proxy. You can select multiple users.
<i>Proxy Assigned</i>	Select the team member who is to act as proxy.
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this proxy assignment.
<i>Addressee</i>	Specifies which users should receive e-mail notifications: All: Specifies that the user assigned as proxy, as well as the team member for whom the proxy has been assigned, receives e-mail notifications. Assign From: Specifies that only the team member(s) for whom the proxy has been assigned receives an e-mail notification. Assign To: Specifies that only the team member who is to act as proxy receives an e-mail notification. Selective: Allows you to send e-mail notifications to any users you select, including users who are not on the team.
<i>Expiration</i>	No Expiration: Select <i>No Expiration</i> if you want the proxy assignment to remain in effect until it is removed or modified. Specify Expiration: Select <i>Specify Expiration</i> to define an <i>End Date</i> . Click the Calendar and select a date and time when the proxy assignment expires.

8 Click *Submit* to save your selections.

If the change was successful, you'll see a message like this:

Submission was successful

Changes will be reflected upon the assigned's next login.

To delete proxy assignments:

- 1 Click *Team Proxy Assignments* in the *My Team's Settings* group of actions.
- 2 To remove a proxy setting, click *Delete*.



You are prompted to confirm the delete. When the deletion is complete, you'll see a confirmation like this:

Submission was successful.Changes will be reflected upon the assigned's next login.

NOTE: As an alternative, you can also delete a proxy assignment during the edit proxy assignment process.

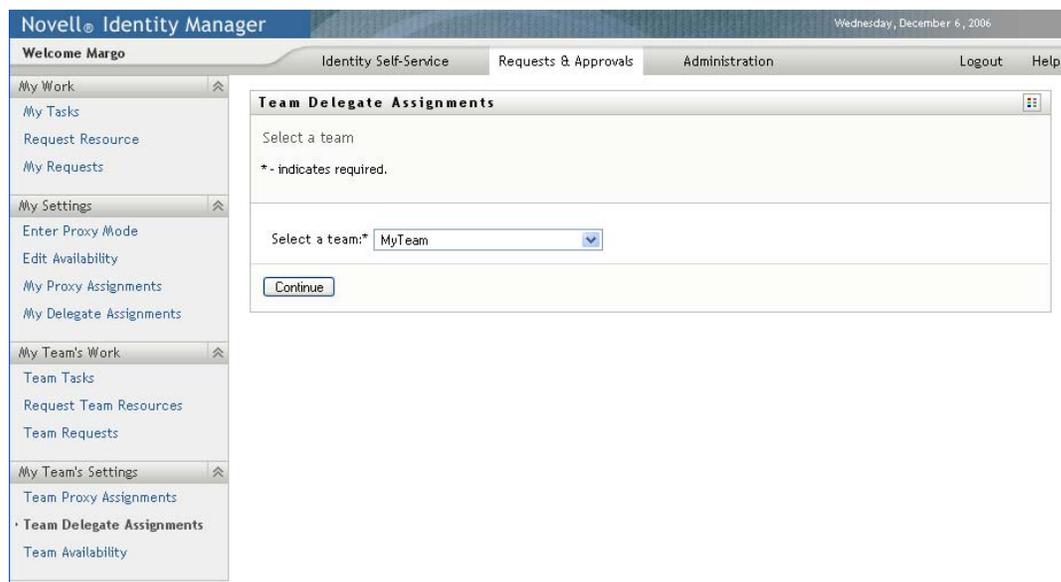
13.3 Viewing and Editing Your Team's Delegate Assignments

The *Team Delegate Assignments* action allows you to manage the delegate assignments for team members. The rules for defining delegates are as follows:

- ◆ You are allowed to define delegates for the members of a team for which you have been designated as team manager, as long as the team definition gives you this permission.
- ◆ The people whom you specify as delegates must also be within your team.
- ◆ The Provisioning Application Administrator has the ability to define delegate assignments for any user, group, or container in the organization.

To define a delegate assignment:

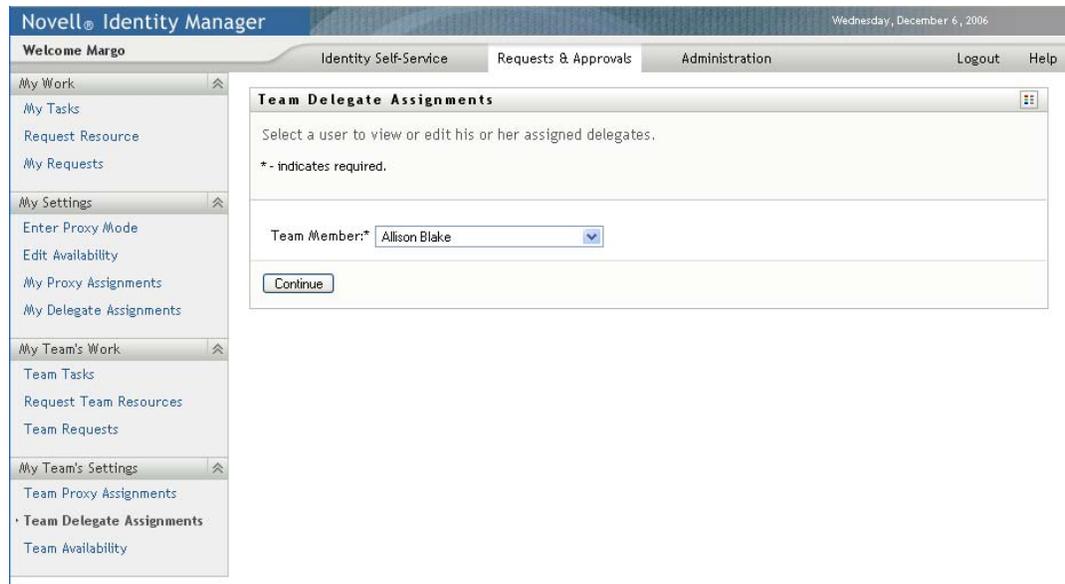
- 1 Click *Team Delegate Assignments* in the *Team Settings* group of actions.
- 2 Click *Select a team* to select a team for which you have been designated as a team manager.



The list of teams includes teams for which team managers are permitted to define delegates (specified in the team request rights), as well as teams for which the ability to set delegates has been disabled. If the team request rights do not permit team managers to define delegates, the manager can still view delegate settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit or delete these settings, view details for these settings, or create new delegate assignments.

If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

- 3 Click *Continue*.
- 4 Click a *Team Member* name to select it.



Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

- 5 Select a team member from the list, and click *Continue*.

Any existing assignments for the team member are displayed.

- 6 Click *New*.

The *New* button is only enabled for those teams for which team managers are permitted to define delegates for team members.

- 7 Fill in the fields as follows:

Field	Description
<i>User</i>	Select one or more users whose work you want to delegate.
<i>Assignment Type</i>	Assign the user who can perform the delegated work by selecting one of the following: <ul style="list-style-type: none"> ◆ Assign Delegate: Select a user from the list. ◆ Assign by Relationship: Select the delegate relationship from the drop-down list.

Field	Description
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this delegate assignment.
<i>Addressee</i>	<p>Specifies which users should receive e-mail notifications:</p> <p>All: Specifies that the user assigned as delegate, as well as the team member for whom the delegate has been assigned, receives e-mail notifications.</p> <p>Assign From: Specifies that only the team member(s) for whom the delegate has been assigned receives an e-mail notification.</p> <p>Assign To: Specifies that only the team member who is to act as delegate receives an e-mail notification.</p> <p>Selective: Allows you to send e-mail notifications to any users you select, including users who are not on the team.</p>
<i>Expiration</i>	<p>No Expiration: Select <i>No Expiration</i> if you want the delegation to remain in effect until it is removed or modified. This, in effect, makes the delegation permanent.</p> <p>Specify Expiration: Select <i>Specify Expiration</i> to define an <i>End Date</i>. Click the Calendar and select a date and time when the delegate assignment expires.</p>
<i>Resource Search Criteria</i>	<p>Select a category from the list.</p> <p>This populates the list of <i>Available Requests</i> in <i>Selected Category</i>.</p>
<i>Available Requests in Selected Category</i>	Select one or more resource requests from this list and click <i>Add</i> .
<i>Selected Requests</i>	This list shows the resource request types that have been delegated. To remove a request type, select it from the list and click <i>Remove</i> .

8 Click *Submit* to save your assignments.

If the save is successful, you'll see a message like this:

```
Submission was successful
Please note that any previous availability settings for users
referenced in processed delegatee assignment will not be updated
automatically. Please check and refresh any existing availability
settings for the corresponding users in order to activate these
changes.
```

To modify delegate assignments:

- 1 Click *Team Delegate Assignments* in the *Team Settings* group of actions.
- 2 Click *Select a team* to select a team for which you have been designated as a team manager.

The list of teams includes teams for which team managers are permitted to define delegates (specified in the team request rights), as well as teams for which the ability to set delegates has been disabled. If the team request rights do not permit team managers to define delegates, the manager can still view delegate settings defined for the team members by the administrator or

by a manager of another team to which these users belong. However, the team manager cannot edit or delete these settings, view details for these settings, or create new delegate assignments. If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

3 Click *Continue*.

4 Click a *Team Member* name to select it.

Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.

The delegate assignments for the selected team member, if any, are displayed.

5 Select a team member from the list, and click *Continue*.

Any existing assignments for the team member are displayed.

6 To edit a delegate assignment, click the edit button in the same row as the assignment you want to modify.



If the team request rights do not permit team managers to define delegates, the edit button is disabled.

7 Fill in the fields as follows:

Field	Description
<i>User</i>	Select one or more users whose work you want to delegate.
<i>Assignment Type</i>	Assign the user who can perform the delegated work by selecting one of the following: <ul style="list-style-type: none"> ◆ Assign Delegate: Select a user from the list. ◆ Assign by Relationship: Select the delegate relationship from the drop-down list.
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this delegate assignment.
<i>Addressee</i>	Specifies which users should receive e-mail notifications: <p>All: Specifies that the user assigned as delegate, as well as the team member for whom the delegate has been assigned, receives e-mail notifications.</p> <p>Assign From: Specifies that only the team member for whom the delegate has been assigned receives an e-mail notification.</p> <p>Assign To: Specifies that only the team member who is to act as delegate receives an e-mail notification.</p> <p>Selective: Allows you to send e-mail notifications to any users you select, including users who are not on the team.</p>

Field	Description
<i>Expiration</i>	<p>No Expiration: Select <i>No Expiration</i> if you want the delegation to remain in effect until it is removed or modified. This, in effect, makes the delegation permanent.</p> <p>Specify Expiration: Select <i>Specify Expiration</i> to define an <i>End Date</i>. Click the Calendar and select a date and time when the delegate assignment expires.</p>
<i>Resource Search Criteria</i>	<p>Select a category from the list.</p> <p>This populates the list of <i>Available Requests in Selected Category</i>.</p> <p>To specify that this delegate assignment applies to all categories, set the resource search criteria for the delegate assignment to <i>All</i>.</p> <div data-bbox="625 730 1299 850" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Request Type Selection</p> <p>Select the types of requests for this delegate assignment. Select a Resource Category to display the available requests.</p> <p>Resource Search Criteria: <input type="text" value="All"/></p> </div>
	<hr/> <p>NOTE: The All option is available only if the Provisioning Administrator has enabled the Allow All Requests option for your application.</p> <hr/>
<i>Available Requests in Selected Category</i>	<p>Select one or more resource requests from this list and click <i>Add</i>.</p> <p>The list of provisioning requests includes only those requests that are within the domain of the team. If the team request rights do not permit team managers to define delegates, the provisioning requests associated with the team are not included in the list.</p>
<i>Selected Requests</i>	<p>This list shows the resource request types that have been delegated. To remove a request type, select it from the list and click <i>Remove</i>.</p>

8 Click *Submit* to save your selections.

To delete a delegate assignment:

- 1 Click *Team Delegate Assignments* in the *Team Settings* group of actions to view assignments delegated to this team member and also assignments delegated away from this team member.
- 2 To remove a delegate assignment, click the delete button in the row of the assignment you want to delete.



You are prompted to confirm the deletion. When the deletion is complete, you'll see a confirmation message.

13.4 Specifying Your Team's Availability

The *Team Availability* action allows you to specify the resource requests your team members are not available to work on. During the time period when you or your team members are not available, any resource requests of that type are forwarded to the delegate's queue.

You can specify availability for each resource request individually or globally. You can only specify the availability for users who have delegates already assigned.

- 1 Click *Team Availability* in the *My Team's Settings* group of actions.
- 2 Click *Select a team* to select a team for which you have been designated as a team manager.



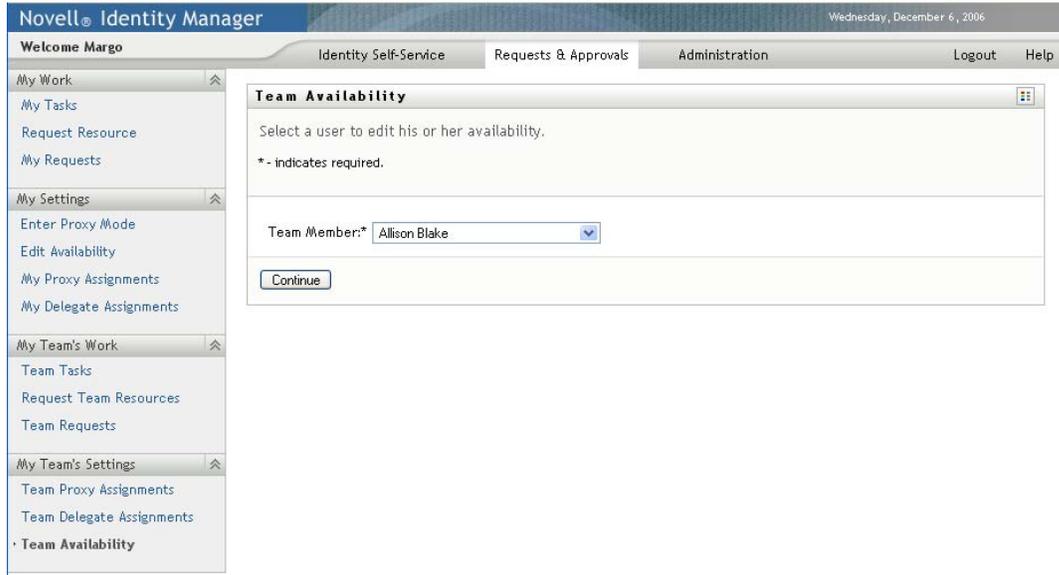
The list of teams includes teams for which team managers are permitted to define availability (specified in the team definition), as well as teams for which the ability to define availability has been disabled. If the team definition does not permit team managers to define availability, the manager can still view availability settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit or delete these settings, view details for these settings, or create new availability assignments.

If you are a Provisioning Application Administrator, you do not see the *Select a team* box.

- 3 Click *Continue*.
- 4 Click a *Team Member* name to select it, and click *Continue*.

Depending on how the team was defined, you might see an *Object Selector* icon  beside the *Team Member* selection box, instead of a list of team members. In this case, click the icon to

open the Object Lookup window. Specify search criteria for the team member, click *Search*, and select the team member.



The availability settings for the selected team member, if any, are displayed.

- 5 To see details about a particular resource associated with an availability assignment, click the name of the resource:

Resource

[Enable Active Directory Account](#)

The page then displays a pop-up window that provides information about the delegate assignment:



This information is particularly helpful in situations where the same resource name appears more than once in the availability settings list.

- 6 Click *New*.

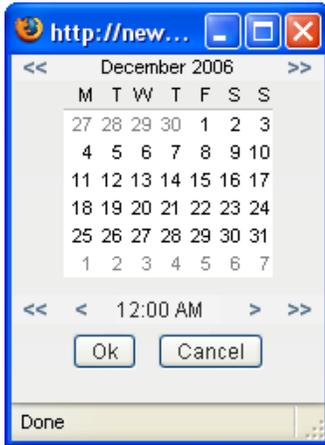
The *New* button is enabled only for those teams for which team managers are permitted to define availability settings for team members.

- 7 Specify the status by selecting one of the options in the *Change Status* drop-down list:

Status	Description
Available for ALL Requests	<p>This is the default status. It indicates that the team member is globally available. When this status is in effect, requests assigned to the team member are not delegated, even if there are delegates assigned.</p> <hr/> <p>NOTE: If you change the status and then change it back to <i>Available for ALL Requests</i>, any <i>Selectively Available</i> settings previously defined are removed.</p>
NOT Available for ANY Requests	<p>Specifies that the team member is not available for any resource requests currently in the system. (This is also known as globally unavailable.)</p> <p>Choosing this status indicates that the team member is unavailable for each existing delegate assignment and changes the current status to <i>Not Available for Specified Requests</i>.</p> <p>Assignments are effective immediately and last until the delegate assignment expires.</p> <hr/> <p>NOTE: This setting does not affect availability for new assignments created after this point.</p>
NOT Available for Specified Requests	<p>When you select this option, you are prompted to specify the team member's availability. (This is the same as clicking the <i>New</i> button.) You'll be prompted to specify:</p> <ul style="list-style-type: none"> ◆ The types of requests the team member is not available for. ◆ The time period when the team member is unavailable. <p>During the time period when the team member is unavailable for a particular request, the user delegated to act on that request can work on it.</p>

8 Specify the time period when the team member is unavailable:

- 8a** Specify when the time period begins by typing the start date and time in the *Unavailable From* box, or by clicking the calendar and selecting the date and time.



- 8b** Specify when the time period ends by clicking one of the following:

Button	Description
<i>No Expiration</i>	Indicates that this unavailability setting does not expire.
<i>Specify Duration</i>	Lets you specify the time period in weeks, days, or hours.
<i>Specify End Date</i>	Lets you specify the end date and time. You can type the date and time, or click the calendar and select the date and time from the calendar.

- 9** Specify whether you want to send e-mail notifications to other users by filling in these fields:

Field	Description
<i>Notify other users of these changes</i>	Indicates whether you want to send an e-mail message to notify one or more users of this availability assignment.
<i>Addressee</i>	Specifies which users should receive e-mail notifications: Selective: Allows you to send e-mail notifications to any users you select, including users who are not on the team.

- 10** Select one or more requests in the *Types of Requests* list box, then click *Add*.

On this page, you select the types of requests that the team member does not accept during the unavailable period. This has the effect of delegating these requests to other users.

Each request you add is included in the *Declined for the Specified Period* list box.

If you add multiple requests for this time period, each request is treated as an individual object that can be edited separately.

- 11** To indicate that this availability setting applies to all request types, click *All Request Types* instead of selecting the request types individually.

All Request Types

The *All Request Types* check box is only available when the resource search criteria for the delegate assignment is set to *All*.

Request Type Selection

Select the types of requests for this delegate assignment. Select a Resource Category to display the available requests.

Resource Search Criteria:

- 12** To remove a request from the list, click *Remove*.
- 13** Click *Submit* to save your changes.