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OpenText™ Identity and Access Management

Administrator Guide

The guide provides detailed information about the IAM Administration application for a Security, Exchange, and Service administrator.

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OpenText™ Identity and Access Management
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Chapter 1

Overview

IAM Administration is a delegated administration tool designed to give power to people who are best in a position to manage user access and make security decisions. In some companies, this may be accomplished through a central office; while in other companies, this may be accomplished by delegating responsibility to people spread throughout the company. The delegated model allows each company to set up the structure that best fits their needs for managing access grants to their users.

The delegated model allows a single company to set up one or more organizations in IAM. IAM organizations are simply groupings of users with their own administrator(s) and their own available service packages. Organizations that are created below the parent organization are called divisions. Administrators in the parent organization can perform tasks on users in the divisions below.

1.1 Defining Administrator Roles

A definition of all Administrator Roles is listed here for informational purposes.

There are several administrator roles available in IAM that can be assigned to users. These roles can be used independently or multiple roles can be combined for a broader variety of administrative options. The available roles include:

Organization Password Administrator
Searches for users' profiles and resets users' passwords

Organization Security Administrator
Administers a specific service package as well as sub-packages associated with it

User Account Administrator
Rejects or approves new user requests. (This role is appropriate for someone in a position to confirm that the user should have access to the secured portal)

Security Administrator
A superset of all administrator rights and responsibilities. An organization can have as many or as few administrators as desired.

The following section displays roles and privileges in two ways. First, "Matrix of privileges associated per role" on page 6 is comprised of privileges associated per role in a matrix view. Second, "List of privileges associated per role" is comprised of privileges associated per role in a list view.

Table 1-1: Matrix of privileges associated per role

Privileges	General User	Password Admin	User Account Admin	Service Admin	Security Admin
APPROVE / REJECT DIVISION’S SERVICE PACKAGE REQUEST	-	-	-	X	X
APPROVE / REJECT NEW USER REGISTRATION REQUESTS	-	-	X	-	X
APPROVE / REJECT ORGANIZATION SERVICE REQUEST	-	-	-	-	X
APPROVE / REJECT SITE CODES FOR DIVISIONS OF YOUR ORG	-	-	-	-	X
APPROVE / REJECT USER’S SERVICE PACKAGE REQUESTS	-	-	-	X	X
AUDIT USER GRANTS	-	-	X	X	X
AUDIT USERS IN COMPANY (QUARTERLY & ANNUALLY)	-	-	X	-	X
CHANGE EMAIL PREFERENCES FOR SELF	X	X	X	X	X

Privileges	General User	Password Admin	User Account Admin	Service Admin	Security Admin
CHANGE PASSWORD OF SELF	X	X	X	X	X
DELETE A DIVISION IN YOUR ORG	-	-	-	-	X
DELETE A USER ACCOUNT	-	-	X	-	X
EDIT ORGANIZATION AND/ OR DIVISION PROFILE	-	-	-	-	X
EDIT PROFILE OF OTHERS	-	-	X	-	X
EDIT PROFILE OF SELF	X	X	X	X	X
GENERATE A SERVICE SUMMARY REPORT	-	-	-	-	X
GENERATE REPORT OF USER SUMMARY BY ORGANIZATION	-	-	-	X	X
GENERATE REPORT OF USERS GRANTS PER SVC. PACKAGE	-	-	-	X	X
GENERATE SECURITY ADMINISTRATOR REPORTS	-	-	-	X	X

Privileges	General User	Password Admin	User Account Admin	Service Admin	Security Admin
GRANT A SERVICE PACKAGE TO A DIVISION IN YOUR ORG	-	-	-	-	X
GRANT A SERVICE PACKAGE TO A USER	-	-	-	X	X
INVITE USERS TO REGISTER	-	-	X	-	X
MODIFY USER ROLES	-	-	-	-	X
MOVE A USER	-	-	X	-	X
REMOVE A SERVICE PACKAGE FROM A DIVISION IN YOUR ORG	-	-	-	-	X
REMOVE SERVICE PACKAGE FROM A USER	-	-	-	X	X
REQUEST A SERVICE PACKAGE FOR MY ORGANIZATION	-	-	-	X	X
REQUEST A SERVICE PACKAGE FOR SELF	X	X	X	X	X
RESET PASSWORD OF OTHERS	-	X	X	-	X

Privileges	General User	Password Admin	User Account Admin	Service Admin	Security Admin
SEARCH / VIEW DETAILS FOR DIVISIONS IN MY ORGANIZATION	-	X	-	X	X
SEARCH FOR USERS IN MY ORGANIZATION	-	X	X	X	X
SPECIFY PASSWORD FOR SELF	-	X	-	-	X
SPECIFY PASSWORD OF OTHERS	-	X	-	-	X
SUSPEND A DIVISION IN YOUR ORG	-	-	-	-	X
SUSPEND A USER ACCOUNT	-	-	X	-	X
VIEW MY ORGANIZATIONAL ADMINISTRATORS	X	X	X	X	X
VIEW ORGANIZATION’S HIERARCHY	-	-	-	-	X
VIEW / CANCEL PENDING REQUESTS OF SELF	X	X	X	X	X
VIEW REQUEST HISTORY OF OTHERS	-	-	-	X	X

Privileges	General User	Password Admin	User Account Admin	Service Admin	Security Admin
VIEW REQUEST HISTORY OF SELF	X	X	X	X	X

List of privileges associated per role

Table 1-2: Privileges associated to all registered users (General Users)

Change email preferences for self	View my organizational administrators
Change password of self	View / cancel pending requests of self
Edit profile of self	View request history of self
Request a service package for self	

Table 1-3: Privileges associated to password administrator

All of General Users +	Search for users in my organization
Reset password of others	Specify password for self
Search / View details for divisions in my organization	Specify password of others

Table 1-4: Privileges associated to user account administrator

All of General Users +	Delete a user account	Reset password of others
Approve / Reject new user registration requests	Edit profile of others	Search for users in my organization
Audit user grants	Invite users to register	Suspend a user account
Audit users in company (Quarterly & Annually)	Move a user	

Table 1-5: Privileges associated to service administrator

All of General Users +	Generate report of users' grants per svc. package	Search /View details for divisions in my organization
Approve / Reject division's service package request	Generate security administrator reports	Search for users in my organization
Approve / Reject user's service package requests	Grant a service package to a user	View request history of others
Audit users in company (Quarterly & Annually)	Remove service package from a user	

Generate report of user summary by organization	Request a service package for my organization	

Table 1-6: Privileges associated to security administrator

All of General Users +	Generate a service summary report	Request a service package for my organization
Approve / Reject division's service package request	Generate report of user summary by organization	Reset password of others
Approve / Reject new user registration requests	Generate report of users' grants per svc. package	Search / View details for divisions in my organization
Approve / Reject organization service request	Generate security administrator reports	Search for users in my organization
Approve / Reject site codes for divisions of your org	Grant a service package to a division in your org	Specify password for self
Approve / Reject user's service package requests	Grant a service package to a user	Specify password of others
Audit user grants	Invite users to register	Suspend a division in your org
Audit users in company (Quarterly & Annually)	Modify user roles	Suspend a user account
Delete a division in your org	Move a user	View organization's hierarchy
Delete a user account	Remove a service package from a division in your org	View request history of other
Edit organization and/or division profile	Remove service package from a user	
Edit profile of others		

1.1.1 Second-level section

Second-level section content.

1.1.1.1 Third-level section

Third-level section content.

Chapter 2

Administration Module – Manage Groups

Service Administrators

Administrators need to perform user group management-related activities such as listing groups, creating groups, and edit grouping to add or remove users. Administrators can use the Administration > Manage Groups module for this purpose.

What is a group?

Groups can be of the following types:

- **Immutable**: Such groups cannot be deleted. Immutable groups are depicted using this icon for public and private groups.
- **Mutable**: Such groups can be modified or deleted. Mutable groups are depicted using this icon for public and private groups.

To open the Manage Groups page

1. Click the main menu to open the navigation pane.
2. Click the arrow adjacent to the **Administration** module to expand the menu.
3. Click **Manage Groups**.

   The Home > Administration: Manage Groups page opens.

The Manage Groups page contains a Filter icon, an Add Group icon, and a list of all of the groups the current user has authorization to view and related details.

Use the Filter icon to open a Refine by pane, which provides options to refine the list of groups using the provided criteria.

The lower part of the Manage Groups page displays the number of records shown on each page which you can change It also shows the number of pages and the total number of records or items.

To change the number of items listed per page setting

- Hover the mouse cursor over the number of records per page and from the popup menu, select the number you want to display.

To navigate the list of roles on all the pages

1. Click **Next** to go to the next page.
2. Click **Previous** to go to the previous page.
3. Click a page number to directly navigate to that page.

2.1 Manage Groups page

The Manage Groups page contains a list of all of the groups an administrator type of user is authorized to view and manage and displays the following details about the groups:

- **Group Name**: Name of a group. Groups are of public and private kind.
- **Description**: Description about the group.
- **Owner**: The name of the organization the group is associated with.
- **Created**: The name of the administrator user who created this group. It also shows the date and time the group was created.
- **Visibility**: Whether the group is public or private. Public groups are visible to all administrators. Private groups are visible only to administrators who created the group.
- **Action**: Displays icons for actions that are permitted for the group such as Add Member to the group and Remove Member from the group, and Delete Group. For immutable roles, the column doesn't show any icons because these groups cannot be modified or deleted from this view. However, you can modify them by clicking the group name and performing further steps needed to edit immutable groups.

Clicking a group name would open the group details in another dialog box. See "View and edit group details" on page 15.

2.1.1 Filter groups

As an administrator, you can filter or refine the list of groups to find specific ones or find ones using certain search criteria.

To filter or refine the list of groups

1. In the Manage Groups page, click **Filter** .
2. In the Refine by pane, use one or both options to use as criteria to refine the list and only display the matching groups:
   - **Type**: Click the arrow and from the list, select either **Unlock** or **Lock**.

  - **Unlock**: Use Unlock to find all those groups that can be modified or deleted.
  - **Lock**: Use Lock to find all those groups that cannot be deleted. They are immutable.
- **Member Type**: Click the arrow and from the list, select from Organization, Person, Service Package, and Application.
  - **Organization**: Use Organization to find all those groups that are of this member type.
  - **Person**: Use Person to find all those groups that are of this member type.
  - **Service Package**: Use Service Package to find all those groups that are of this member type.
  - **Application**: Use Application to find all those groups that are of this member type.
- Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

  The matching records are listed in the Manage Groups page. The fields used for the search are shown as tokens above the column names on the page.
- Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
- Click **Close** to close the Refine by pane.

2.1.2 View and edit group details

Administrators can view the details of a group and can add new members to the group.

To view and edit the details of a group

1. In the Manage Groups page, after refining the listed records if needed, click the name of the group whose details you want to view.
2. The Edit Group dialog box opens and displays the following details:
   - **Select Template**: Shows the name of the template used for the group. The value cannot be edited.
   - **Name** of the group, **Assigned Group Owner**, **Description** of the group, **Group Visibility Type** whether the group is public or private : The values in all these fields can be edited.
     - To edit the name and description, simply type the new name and description in the respective fields.
     - To change the group owner, use the **Change** option. See “To change assigned group owner of a group“ on page 16.

  - To change the group visibility type, either click **Public group** or **Private group**.

- **Assigned Members**: This section shows the members who are part of the group.

  You can add more members to the group using the **Assign Members** icon . See "Assign group members to a group" on page 16.

  To remove a member from the group, hover the cursor over that member and then click the Remove icon Click **Remove** in the confirmation dialog box. Member removed successful message is shown. Click **Save**.

3. Click **Save** if you edited any of the details. Click **Cancel** to not save the edits and click **X** to close the dialog box.

   A message that the group was updated successfully is shown.

To change assigned group owner of a group

1. Click **Change** adjacent to the group owner name in the Edit Group dialog box.
2. In the Change Owner dialog box, click the name of the owner you want to assign to the group as the new owner.
3. Click **Assign**. To cancel changing the group owner, either click **Cancel** or the **Back** icon in the title bar of the Change Owner dialog box.

   The Change Owner dialog box closes, and the selected owner is shown in the Assigned Group Owner field in the Edit Group dialog box.

4. Click **Save**.

   A message that the group was updated successfully is shown.

2.1.2.1 Assign group members to a group

Administrators can assign members to a group in two ways:

- from the Manage Groups page (see "To assign members to a group from the Manage Group page" on page 18)
- from the Edit Group page (see "To assign members to a group using the Edit Group dialog box" on page 17)

To assign members to a group, both methods use the Member List dialog box, which displays a list of members and their details such as Membership Id, Member Id, Member Type and Creation Date. You can filter the list of members in the dialog using the Refine by pane.

To filter the members list

1. Click the Filter icon .

2. In the Refine by pane, use one, more, or all of the options to use as criteria to refine the list and only display the matching members:

   - **Member Id**: Enter the member id of the member you want to add to the group.
   - **Member Type**: Click the arrow and from the list, select from Organization, Person, Service Package, and Application.
     - **Organization**: Use Organization to find all those members that are of this member type.
     - **Person**: Use Person to find all those members that are of this member type.
     - **Service Package**: Use Service Package to find all those members that are of this member type.
     - **Application**: Use Application to find all those members that are of this member type.
   - **Group Owner Id**: Enter the group owner id to find the members related to the group owner. (please provide correct description)
   - **Group Owner Type**: Click the arrow and from the list, select either **Person** or **Application**.
     - **Person**: Use Person to find all those members that are of person group owner type. (please provide correct description)
     - **Application**: Use Application to find all those members that are of application group owner type. (please provide correct description)
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the Manage Groups page. The fields used for the search are shown as tokens above the column names on the page.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

To assign members to a group using the Edit Group dialog box

1. With the Edit Group dialog box open for a group in which you want to add more members, click **Assign Members** icon .

   The Member List dialog box opens and displays a list of members and their details such as Membership Id, Member Id, Member Type and Creation Date.
2. In the Member List dialog box, filter down the list of members if needed, using the Filter icon. See “To filter the members list“ on page 16.
3. Click a member record in the list to select it. You can only select one member.

4. Click **Assign**. To cancel assigning a member to a group, either click **Cancel** or the **Back** icon in the title bar of the Member List dialog box.

   The Member List dialog box closes, and the selected member is assigned to the group.

5. Click **Save** in the Edit Group dialog box.

To assign members to a group from the Manage Group page

1. In the Manage Groups page, if needed filter the list of groups to find the one to which you want to assign members. See “Filter groups” on page 14.

2. After you locate the group, hover over the group record in the list and click the **Add Member** icon in the **Action** column for that group.

3. Follow steps 2 to 4 in “To assign members to a group using the Edit Group dialog box“ on page 17.

   Group updated successfully message displays.

2.1.2.2 Remove members from a group

Administrators can remove members from a group in two ways:

- from the Manage Groups page (see “To remove members from a group from the Manage Group page“ on page 18)
- from the Edit Group dialog box (see “To assign members to a group using the Edit Group dialog box“ on page 17)

To remove members from a group from the Manage Group page

1. In the Manage Groups page, if needed filter the list of groups to find the one from which you want to remove members. See “Filter groups” on page 14.

2. After you locate the group, hover over the group record in the list and click the **Remove Member** icon in the **Action** column for that group.

3. In the Remove Members dialog box, click the Remove icon for the member you want to remove.

   Group updated successfully message displays.

4. Click **Remove** in the confirmation dialog box.

   1 group member removed successfully message is shown.

5. Repeat step 4 if needed.

6. Click the **Back** icon to close the Remove Members dialog box and go back to the Manage Groups page.

To remove members from a group from the Edit Group page

1. With Edit Group dialog box open for a group, perform the following steps. See "View and edit group details" on page 15.
2. In the **Assigned Members** box, to remove a member from the group, hover the cursor over that member and then click the Remove icon.
3. Click **Remove** in the confirmation dialog box.

   Member removed successful message is shown.
4. Click **Save**.

2.1.3 Create a new group

Administrators can create new groups and assign members to them.

To create a new group

1. In the Manage Groups page, click the **Add Group** icon in the title bar of the page.
2. In the Create Group dialog box, do the following to populate the fields to create the new group:

   All the mandatory fields are marked with an asterisk.

   - **Select Template**: Click the arrow in the field, and from the list, select a template to use for the new group.
   - **Name**: Type a unique name for the new group.
   - Assigned Group Owner: I couldn't add an owner
   - **Description**: Type a description about the group.
   - **Group Visibility Type**: Click either **Public group** if the group would be visible to all administrators or **Private group** if the group would only be visible to the administrator who is creating the group.
   - **Assigned Members**: Click **Assign Members** icon and add members to the group. See "Assign group members to a group" on page 16.
3. Click **Create**.

   I got an error message.

2.1.4 Delete a group

Administrators with certain privileges can view and delete groups in the Manage Groups page. Immutable groups depicted with this icon cannot be deleted.

To delete a group

1. In the Manage Groups page, if needed filter the list of groups to find the one you want to delete. See “Filter groups” on page 14.
2. After you locate the group to delete, hover over the group record in the list and click the **Delete Group** icon in the **Action** column for that group.
3. Click **Delete** in the confirmation message.

   Group deleted successfully message displays.

Chapter 3

Administration Module – Manage Roles

Administrators can manage the roles associated with an organization and manage the users assigned to those roles in the IAM Administration application using the Manage Roles menu in the Administration module.

Roles can be of the following types:

- **Immutable**: Such roles cannot be modified or deleted. Immutable roles are depicted using this icon .
- **Mutable**: Such roles can be modified or deleted. Mutable roles are depicted using this icon

To open the Manage Roles page

1. Click the main menu to open the navigation pane.
2. Click the arrow adjacent to the **Administration** module to expand the menu.
3. Click **Manage Roles**.

   The Home > Administration: Manage Roles page opens.

The Manage Roles page contains a Filter icon and a list of all of the roles associated with the organization and related details.

Use the Filter icon to open a Refine by pane, which provides options to refine the list of roles using the provided criteria.

The lower part of the Manage Roles page displays the number of records shown on each page 10 per page which you can change It also shows the number of pages and the total number of records or items.

To change the number of items listed per page setting

- Hover the mouse cursor over the number of records per page and from the popup menu, select the number you want to display.

To navigate the list of roles on all the pages

1. Click **Next** to go to the next page.
2. Click **Previous** to go to the previous page.

3. Click a page number to directly navigate to that page.

3.1 Manage roles page

The Manage Roles page contains a list of all of the roles associated with an organization and displays the following details about the roles:

- **Role Name**: Name of a role.
- **Role Type**: Type of a role.
- **Owning Organization**: The name of the organization the role is associated with.
- **Action**: Displays icons for actions that are permitted for the role such as Add users and Remove users . For immutable roles, the column doesn't show any icons because these roles cannot be modified or deleted.

Clicking a role name would open the role details in another dialog box. See "View role details" on page 23.

3.1.1 Filter roles

As an administrator, you can filter or refine the list of roles to find specific ones or find ones using certain search criteria.

To filter or refine the list of roles

1. In the Manage Roles page, click **Filter** .
2. In the Refine by pane, use one or both options to use as criteria to refine the list and only display the matching requests:
   - **Role Name**: Type a role name.
   - **Immutable**: Click the arrow and from the list, select either **False** or **True**.
     - **False**: Use False to find all those roles that can be modified or can be deleted.
     - **True**: Use True to find all those roles that cannot be modified or deleted. They are immutable.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the Manage Roles page. The fields used for the search are shown as tokens above the column names on the page.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

3.1.2 View role details

Administrators can view the details of a role such as all the users who are assigned that role. They can add new users to that role or remove existing users from that role.

To view the details of a role

1. In the Manage Roles page, after refining the listed records if needed, click the role whose details you want to view.
2. A dialog box with the selected role's name opens and displays the following details:
   - **Role Name, Description, Role Type, Role Code**: The name, description, type, and code of the selected role are shown. The values in these fields cannot be edited.
   - **Assigned Users**: This section shows the number of users who are assigned this role and, when expanded, lists all these users and related details.

3.1.3 Add users to a role

For Exchange operators, Security Admin

Both active and inactive users can be added to a role. You can add single or multiple users at the same time, up to a maximum of 20, to a role.

There are two ways to add users to a role:

- From the role details dialog box. See "To add users to a role from the role details dialog box" on page 23.
- From the Manage Roles page. See "To add users to a role from manage Roles page" on page 24

To add users to a role from the role details dialog box

1. Follow the steps in "View role details" on page 23 to open the role dialog box to view the role details.
2. Click the arrow in the **Assigned Users** section.
3. In the expanded assigned users section, click **Add Users** .

   The User List dialog box opens and displays a list of active and inactive users and their details such as user name, user id, job title, email address, and their status that shows if they are active or inactive.
4. In the User List dialog box, do the following to filter and select one or more users to assign to the role:

- Click the Filter icon to open the Refine by pane and refine the list of users using the following criteria or fields:
  - **User Id**: Type the user id of the user you want to add to the role.
  - **Email**: Type the email id of the user who you want to add to the role.
  - **Package Id**: Type the package id associated with the user you want to add to the role.
  - **Claim Id**: Type the claim id associated with the user you want to add to the role.
  - Click **Filter** to narrow down the list of users using the specified criteria. Click **Close** or the **Filter** icon to close the Refine by pane.

5. Click the check boxes adjacent to the names of the users you want to add to the role or click the check box adjacent to the **User Name** column name to select all the listed users on one page.

   Note: Only 20 users can be selected and added to a role at a time. The title bar of the dialog box shows the count of the number of users you select Selected 10.

   Selecting more than 20 users will display a warning that user selection cannot exceed 20. Click the check box adjacent to the **User Name** column name to clear the check boxes and close the warning message.

   On user selection, the title bar of the dialog box transforms and shows **Selected** and the Show icon. Clicking the Show icon expands the title bar area to also show the dialog box name, and the back arrow and Filter icons. Clicking the Hide icon hides the dialog box name, and the back arrow and Filter icons, and only shows Selected and the Show icon.

6. Click **Assign** to add the selected users to the role. Clicking **Cancel** or back arrow in the title bar would close the dialog box without adding any users.

   The User List dialog box closes and the selected users are added to the top part of the users' list in the Assign Users section.

7. Click **Save** to add the user to the role.

   Role updated successfully message is shown and the Role dialog box closes.

To add users to a role from manage Roles page

1. In the Manage Roles page, click the **Add users** icon in the Action column for the role to which you want to add more users.
2. In the User List dialog box that opens, follow the instructions from Step 4 to Step 5 to add users to the role.

3. Click **Assign** to add the selected users to the role. Clicking **Cancel** or back arrow ← in the title bar would close the dialog box without adding any users.

   The User List dialog box closes, and a message is shown that the selected number of users are added successfully.

3.1.4 Remove users from a role

For Exchange operators, Security Admin

Administrators with right privileges can remove a single or multiple users at the same time, up to a maximum of 20, from a role.

There are two ways to remove users from a role:

- Using the role details dialog box. See "To remove users from a role using the role details dialog box" on page 25.
- From the Manage Roles page. See "To remove users from a role from the manage Roles page" on page 26

To remove users from a role using the role details dialog box

1. Follow the steps in "View role details" on page 23 to open the role dialog box to view the role details.
2. Click the arrow in the **Assigned Users** section.
3. In the expanded assigned users section, click the check box adjacent to name of the user you want to remove.

   On user selection, the tool bar of the Assigned Users section transforms and shows the count of the number of selected users Selected 1, **Remove**, and the Show icon. Clicking the Show icon expands the tool bar area to also show the Filter and Add Users + icons. Clicking the Hide icon hides the Filter and Add Users icons, and only shows **Selected**, **Remove**, and the **Show** icon.

4. Click the **Remove** icon in the Action column for the selected user. Alternatively, you can click **Remove** in the title bar.
5. Click **Remove** in the confirmation message.

   User removed successfully message is shown.

6. To remove multiple users, select the check box for each of those users or to select all the users listed on a page, click the check box adjacent to the **User Name** column name.

Note: Only 20 users can be selected and removed from a role at a time. The title bar shows the count of the number of selected users Selected 10.

Selecting more than 20 users will display a warning that user selection cannot exceed 20. Click the check box adjacent to the **User Name** column name to clear the check boxes and close the warning message.

7. Click **Remove** in the title bar to remove all the selected users together.

8. Click **Remove** in the confirmation message.

   Users removed successfully message is shown.

9. Close the role dialog box by clicking X or **Save**.

To remove users from a role from the manage Roles page

1. In the Manage Roles page, click the **Remove users** icon in the Action column for the role from which you want to remove users.

   The Remove Users dialog box opens and displays a list of users and their details such as user name, user id, job title, email address, and their status that shows if they are active or inactive.

2. In the Remove Users dialog box, do the following to filter and select one or more users to remove from the role:

   - Click the Filter icon to open the Refine by pane and refine the list of users using the following criteria or fields:

     – **User Id**: Type the user id of the user you want to remove.

     – **Email**: Type the email id of the user who you want to remove.

     – **Package Id**: Type the package id associated with the user you want to remove.

     – **Claim Id**: Type the claim id associated with the user you want to remove.

     – Click **Filter** to narrow down the list of users using the specified criteria. Click **Close** or the **Filter** icon to close the Refine by pane.

3. Click the check boxes adjacent to the names of the users you want to remove from the role or click the check box adjacent to the **User Name** column name to select all the listed users on one page.

   Note: Only 20 users can be selected and removed from a role at a time. The title bar of the dialog box shows the count of the number of users you select Selected 10.

Selecting more than 20 users will display a warning that user selection cannot exceed 20. Click the check box adjacent to the **User Name** column name to clear the check boxes and close the warning message.

On user selection, the title bar of the dialog box transforms and shows **Selected** and the Show icon. Clicking the Show icon expands the title bar area to also show the dialog box name, and the back arrow and Filter icons. Clicking the Hide icon hides the dialog box name and the back arrow and Filter icons, and only shows Selected and the Show icon.

4. Click **Remove** to remove the selected users from the role. Clicking **Cancel** or back arrow in the title bar would close the dialog box without removing any users from the role.
5. Click **Remove** in the confirmation message.

   Users removed successfully message is shown.

   The Remove Users dialog box closes.

Chapter 4

Administration Module – Manage Applications

Only Administrators with Exchange operator, Security Administrator, Service Administrator privileges are able to view Administration > Manage Applications module.

Administrators can view and manage service packages and sub packages that they are authorized to manage for their organization using the Manage Applications page.

To open the Manage Applications page

1. Click the main menu to open the navigation pane.
2. Click **My Tasks**.

   The Home > My Tasks page opens.
3. Click the arrow adjacent to the **Administration** module to expand the menu.
4. Click **Manage Applications**.

   The Home > Administration: Manage Applications page opens.

The Manage Applications page contains a Filter icon, an Add Package icon, and a list of all of the service packages and subpackages the current administrator is authorized to view and manage and related details.

Use the Filter icon to open a Refine by pane, which provides options to refine the list of service packages using the provided criteria.

The lower part of the Manage Applications page displays the number of records shown on each page 10 per page which you can change. It also shows the number of pages and the total number of records or items.

To change the number of items listed per page setting

- Hover the mouse cursor over the number of records per page and from the popup menu, select the number you want to display.

To navigate the list of roles on all the pages

1. Click **Next** to go to the next page.
2. Click **Previous** to go to the previous page.

3. Click a page number to directly navigate to that page.

4.1 Manage Applications page

The Manage Applications page contains a list of all of the service packages and subpackages the current administrator is authorized to view and manage, and displays the following details about the service packages:

- **Package Name**: Name of a service package. If the package has subpackages, an arrow displays adjacent to the package name. Clicking the arrow expands the package list and displays the subpackages.
- **Description**: Description about the service package.
- **Category**: The category such as Administration, Applications, or Roles the service package is associated with.
- **Auto Granted to SAO**: need a description
- **All Access Enabled**: need a description
- **Creation Date**: The date when the package was created.
- **Visibility**: Whether the group is public or private. Public groups are visible to all administrators. Private groups are visible only to administrators who created the group.
- **Action**: Displays the following icons for actions that are permitted for the service package:
  - **Add Package** to add subpackages to the selected service package. Subpackages do not have the Add package icon in the Action column.
  - **View Details** to see the details of the selected package. The details cannot be edited in this view.
  - **Remove Package** to remove a service package. Clicking the Remove Package icon for a parent service package with subpackages will also remove the subpackages.

Clicking a group name would open the group details in another dialog box. See "View and edit group details" on page 15.

4.1.1 Filter service packages

As an administrator, you can filter or refine the list of service packages to find specific ones or find ones using certain search criteria.

To filter or refine the list of packages

1. In the Manage Applications page, click **Filter** on the title bar.
2. In the Refine by pane, use one, some, or all options to use as criteria to refine the list and only display the matching packages:
   - **Parent Package Name**: Type the name of the parent service package if you are searching for subpackages in that parent package.
   - **Category**: Click the arrow in the field and from the list, select from Administration, Applications, and Roles.
     - **Administration**: Use Administration to find all those packages that are associated with this category.
     - **Applications**: Use Applications to find all those packages that are associated with this category.
     - **Roles**: Use Roles to find all those packages that are associated with this category.
   - **Parent Service Id**: Type the id of the parent service package if you are searching for subpackages in that parent package.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the Manage Applications page. The fields used for the search are shown as tokens above the column names on the page.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

4.1.2 View service package details

Administrators can view the details of a service package and subpackages using the View Details icon in the Action column in the Manage Applications page. The details in this view cannot be edited.

To view the details of a group

1. In the Manage Applications page, after refining the listed records if needed, click the **View Details** icon of the service package whose details you want to view.
    - To view the details of a subpackage, first expand the parent service package by clicking the arrow adjacent to the package name and then from the expanded list of subpackages, click the **View Details** icon in the Action column for the subpackage.
2. The details box opens and displays the following details:
    - **Parent Service**: It is the Id of the parent service package.
    - **Package Name**: Name of the package or subpackage.
    - **Category**: The name of the category the package is associated with.
    - **Owning Organization**: Name of the organization that is the owner of the service package.
    - **Approval Required**: Name of the role that approves changes to the service package.
    - **Select Template**: Shows the name of the template used for the group. The value cannot be edited.
    - **Description**: Description about the service package or subpackage.
    - **Terms and Conditions**:
    - **Included Services**: Lists the services that are included with the service package. The number of services is shown in the title bar. Expand the list by clicking the arrow to view the list of services. The list of services displays the service name, service id, description and category of the service. Collapse the list by clicking in the Included Services title bar.
    - **Access Settings**: Lists the access settings. The total number of settings is shown on the title bar. Expand the list by clicking the arrow to view the list of access settings. The list of access settings displays the name and status of the setting whether the setting is on or off. Collapse the list by clicking in the Access Setting title bar.
        - **Protected**: Indicates if this package is synched back to the Cleartrust entitlements server, and therefore, protected by the CT web agent.

- **Requestable**: Indicates if this package can be requested by persons or organizations
- **Grantable**: Indicates if this package can be granted to persons or organizations.
- **Displayable**: Indicates if this package can be displayed or suppressed in UIs.
- **Request Reason Required**: Indicates if package requests must require a reason provided by the requestor.
- **Fast Reg Enabled**: Indicates if this package is synched back to the Cleartrust entitlements server, and therefore, protected by the CT web agent.
- **Person Tac Enabled**: Flag to notify the packages terms and condition pertinent to person is enabled, read only
- **Organization Tac Enabled**: Flag to notify the packages terms and condition pertinent to organization is enabled, read only
- **Service Auto Grant Enabled**: Flag to configure if the package needs to be auto granted to new users in an organization. This flag will also enable grant to existing users during a cascade, as configured by Cascade Enabled flag.
- **Cascade Enabled**: Flag to configure if a package grant to an Organization needs to be cascade to all the divisions in an organization.

3. Click **X** to close the details box.

4.1.3 Add a new subpackage

For Exchange operators, Security Admin, Service Admin

Administrators can add new subpackages to existing service packages. Service packages with subpackages are referred to as parent service packages.

There are two ways to add subpackages:

- Using the Add Package icon in the title bar of Manage Applications page. See "To add a subpackage using the Add Package icon in the title bar of Manage Applications page" on page 33.
- Using the Add Package icon in the Action column for a service package listed in the Manage Application page. See "To add users to a role from manage Roles page" on page 24

To add a subpackage using the Add Package icon in the title bar of Manage Applications page

1. In the Manage Applications page, click the Add Package icon in the title bar.

2. In the Create Subpackage dialog box, do the following:

   Required fields are marked with an asterisk.

   a. In the **Parent Package** field, click the arrow and from the list, select an existing service package to which you want to add a new subpackage.
   b. In **Package Name**, type an appropriate name for the new subpackage.
      - Click **supported language(s)** link and in the Translation dialog box, provide localized package name in different languages. Click **Save** when you are done.
   c. In the **Category** field, click the arrow and from the list, select an appropriate value from Administration, Applications, and Roles.
      - **Administration**: Use Administration if the new subpackage is associated with this category.
      - **Applications**: Use Applications if the new subpackage is associated with this category.
      - **Roles**: Use Roles if the new subpackage is associated with this category.
   d. In **Description**, type a description about the new subpackage.
      - Click **supported language(s)** link and in the Translation dialog box, provide localized description in different languages. Click **Save** when you are done.
   e. In the **Terms & Conditions** field, click the arrow and from the list, select a value from Organization and Person. need a description for Term and condition and what the values mean.
   f. In **Tac Id**, select an appropriate value from the list. what is this?
   g. **Owning Organization Details** and **Required Approvals**: These two fields are pre-populated based on the selection in the Parent Package field.
   h. In the **Access Settings** section, click the toggle in the Status column for each setting to either on or off as needed. The description field explains what each setting does. Hover over the description for a setting if it is not fully visible to show a tooltip.

3. Click **Create**.

   Package created successfully message displays.

   The newly created subpackage is listed on the Manage Applications page under the parent service package. You can use the Refine by pane to search for it.

To add a subpackage using the Add Package icon in the Action column for a service package

1. In the Manage Applications page, click the **Add Package** icon in the Action column for a service package to which you want to add a subpackage.

The Create Subpackage dialog box opens. The **Parent Package** field already shows the service package name because you clicked the inline **Add package** icon for this service package.

2. In the Create Subpackage dialog box, provide the other details for the new subpackage using steps 2 to 3 in "To add a subpackage using the Add Package icon in the title bar of Manage Applications page" on page 33.

4.1.4 Remove a service package or a subpackage

For Exchange operators, Security Admin

Administrators with right privileges can remove subpackages from a parent service package or can remove a service package.

To remove a subpackage from a parent service package

1. In the Manage Applications page, use the **Filter** option to find the parent service package from which you want to remove a subpackage. See "Filter service packages" on page 31.

2. Expand the parent service package by clicking the arrow adjacent to the package name and then from the expanded list of subpackages, click the **Delete Package** icon in the Action column for the subpackage you want to delete.

   The Remove dialog box displays and informs you about the consequences of deleting a subpackage.

3. Click **Remove** to confirm the deletion. If you don't want to delete, click **Cancel**.

   A message informs that the subpackage is submitted for deletion, and the deletion might take some time.

   After the subpackage is deleted, it is no longer listed under the parent service package on the Manage Applications page.

To remove a service package

1. In the Manage Applications page, use the **Filter** option to find the service package you want to delete. See "Filter service packages" on page 31.

2. Click the **Delete Package** icon in the Action column for the service package you want to delete.

   The Remove dialog box displays and informs you about the consequences of deleting a package or subpackage.

3. Click **Remove** to confirm the deletion. If you don't want to delete, click **Cancel**.

   A message informs that the package is submitted for deletion, and the deletion might take some time.

After the package is deleted, it is no longer listed on the Manage Applications page.

4.1.5 View and edit subpackage details

Administrators can open a subpackage to view its details and edit them if needed.

To view and edit the details of a subpackage

1. In the Manage Applications page, use the **Filter** option to find the parent service package whose subpackage you want to view and edit. See “Filter service packages” on page 31.

2. Expand the parent service package by clicking the arrow > adjacent to the package name and then from the expanded list of subpackages, click the name of the subpackage you want to view and edit.

   The subpackage opens in a new page. The breadcrumbs, Home > Administration: Manage Applications > *subpackage name*, above the page show where you are. The page displays the following details:

   - the subpackage name and Package ID whicjh cannot be edited.
   - **Overview** and **Services** tabs
     - The **Overview** tab displays package details such as parent package name, package name, category, description, owning organization details, required approvals, and access settings. You can edit any of these fields except Parent Package, Owning Organization Details, and Required Approvals. See “View service package details” on page 32 and “Add a new subpackage” on page 33 for additional information about the fields. Edit the fields as needed and click **Update**. The message data is updated successfully is shown.
     - The **Services** tab lists services associated with the subpackage in the Associated Services section.
       - To add more services to the subpackage, see “To add services to a subpackage“ on page 36.
       - To remove a service, see “To remove an associated service from a subpackage“ on page 37.
       - To view and edit an associated service, see “To view and edit an associated service“ on page 38.
   - Click ← on the title bar or **Cancel** to close this page and go back to the Manage Applications page.

To add services to a subpackage

1. Click the **Add Services** icon + in the **Associated Services** title bar on the **Services** tab in an open subpackage.

2. In the Create Service dialog box, do the following:

   Required fields are marked with an asterisk.

   a. In **Service Name**, type a name for the new service you want to add to the subpackage.

      - Click **supported language(s)** link and in the Translation dialog box, provide localized service name in different languages. Click **Save** when you are done.

   b. In the **Category** field, click the arrow and from the list, select an appropriate value from Administration, Applications, and Roles.

      - **Administration**: Use Administration if the new service is associated with this category.
      - **Applications**: Use Applications if the new service is associated with this category.
      - **Roles**: Use Roles if the new service is associated with this category.

   c. In **Parent Service Id**, enter the Id of the parent service package of the subpackage in which you are adding the new service.

   d. Icon Url: whats this

   e. **Description**: Enter a description about the new service.

      - Click **supported language(s)** link and in the Translation dialog box, provide localized description in different languages. Click **Save** when you are done.

   f. In **Service Url**, click the **Assign members** icon to provide the following details:

      i. In **Service Url Type**, click arrow and from the list, select from **Default**, **Original Service**, **Mobile Service**, **More Info**, and **Training**.

      ii. In **Service Url Value**, enter the url for the selected service type.

      iii. Click **Add**.

      The service url and service type are added to the Service Url box.

   g. For **Messaging Enabled**, click the toggle to either turn it on or off.

   h. Click **Create**.

      If you are authorized to create a service, the service is created and added to the Associate Services section. If you are not authorized to create a service, you will get the message that you are not authorized.

To remove an associated service from a subpackage

1. Make sure you are in the **Associated Services** section on the **Services** tab in an open subpackage.

2. To remove a service, simply click the **Remove Service** icon in the Action column for the service you want to delete.

   The Remove dialog box displays and informs you about the consequences of deleting a service.

3. Click **Remove** to confirm the deletion. If you don't want to delete, click **Cancel**.

   A message informs that the service is submitted for deletion, and the deletion might take some time.

   After the service is deleted, it is no longer listed in the Associated Services section.

To view and edit an associated service

1. Make sure you are in the **Associated Services** section on the **Services** tab in an open subpackage.

2. Click the name of the associated service you want to view and edit.

   The service opens in a new page. The breadcrumbs, Home > Administration: Manage Applications > *subpackage name* > *service name*, above the page show where you are. The page displays the following details:

   - the service name, Package ID, and Package Name, which cannot be edited.
   - The page also displays details such as service name, category, parent service ID, parent service type, description, service url and messaging enabled. You can edit any of these fields except Parent Service ID and Parent Service Type. See "To add services to a subpackage" on page 36for additional information about the fields. Edit the fields as needed and click **Save**. The message data is updated successfully is shown.
   - Click **Close** or to go back to the **Services** tab of the open subpackge in which you are viewing and editing an associated service.

Chapter 5

My Tasks Module – Manage Organization and User Requests

For Exchange operators, Security Admin, Service Admin

Administrators can manage user requests and requests from organizations for registration, service packages, and claims in the IAM Administration application using the My Tasks page.

To open the My Tasks page

1. Click the main menu to open the navigation pane.
2. Click **My Tasks**.

   The Home > My Tasks page opens.

The My Tasks page contains a Filter icon , three tabs, and a toggle control to switch between Organization requests and user requests . When the toggle is set to Organization requests, the page displays the following three tabs and the number of pending requests on each tab:

- New Organization requests: Lists all the new organization registrations requests.
- Service package requests: The tab displays the number of pending requests.
- Claim requests

When the toggle is set to User requests, the page displays the following three tabs and the number of pending requests on each tab:

- New user requests
- Service package requests
- Claim requests

Use the Filter icon to open a Refine by pane, which provides options to refine the list of requests on each tab page using the provided criteria.

The lower part of the My Tasks page displays the number of records shown on each page which you can change It also shows the number of pages and the total number of records or items.

To change the number of items listed per page setting

- Hover the mouse cursor over the number of records per page and from the popup menu, select the number you want to display.

To navigate the list of roles on all the pages

1. Click **Next** to go to the next page.
2. Click **Previous** to go to the previous page.
3. Click a page number to directly navigate to that page.

5.1 Manage Organization Requests

Administrators can manage different types of requests from different organizations on the My Tasks page. Make sure the toggle control is set to Organization requests.

To change toggle control to Organization requests

- In the **My Tasks** page, click the toggle control to switch to Organization requests if the toggle is set to User requests.

  The New Organization requests tab is selected by default and lists all the organization requests.

5.1.1 New organization requests

The New Organization requests tab lists all the new organization registrations requests and displays the following details about the requests:

- **Requested Organization**: Name of the organization that made the request. You can click the column name to sort the items on the page in ascending or descending order.
- **Request Id**: ID of the request for the new organization registration. You can click the column name to sort the items on the page in ascending or descending order.
- **Reason**: the reason provided during the request for the new organization registration.
- **Requested administrator**: ID of the administrator who made the request and is registered along with the organization
- **Request Date**: Date and time of the request for the new organization registration

Clicking a request item would open the request details in another dialog box. See [xref to non-existent element "sec-0112"].

5.1.1.1 Filter new organization requests

As an administrator, you can filter or refine the list of new organizations requests to find specific ones or find ones using certain search criteria.

To filter or refine the list of new organization requests

1. Make sure the New Organization requests tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one, some, or all of the following options to use as criteria to refine the list and only display the matching requests:
   - **Registrant ID**: Enter the ID of the user that is created in the API when a new organization is registered. When a new organization is registered, first a user is created in the API. Registrant ID is the ID of this user. This user is granted the security administrator role for the organization being registered.
   - **Organization ID**: Enter the ID of the organization that made the new organization registration request. This ID is created in the API for the organization during registration.
   - **Organization Name**: Type the name of the organization that made the request to find the organization's request.
   - **Start Date**: Use the Start Date and End Date fields to search for requests made during a specific time frame. Click the calendar icon and select a date as a start date for the search.
   - **End Date**: Click the calendar icon and select a date as the end date for the search time frame. If no date is selected, the current date is used as the end date.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the New Organization requests page. The fields used for the search are shown as tokens above the column names on the page.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

5.1.1.2 View , approve, or reject new organization requests

Administrators can view the details of the requests they receive from organizations in the Request: New Organization dialog box and then choose to either approve or reject those requests.

To view the details of a new organization request

1. In the New Organization requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: New Organization dialog box displays the following details:
   - **Requesting organization details**: details such as name, address, organization ID of the requesting organization.
   - **Requesting administrator details**: details such as name, user ID, email address, phone number of the requesting administrator.
   - **Organization details**: This section shows the details of the request such as requestor organization name, reason for the request provided by the requestor, actions Approve and Reject buttons, and a text box to provide the reason for approving or rejecting the request.
   - **Included requests**: Displays other requests such as claims, claim code, a reason for the request, action buttons Approve and Reject and a text to provide the reason for approving or rejecting the claim request.

To approve a new organization request

1. In the New Organization requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: New Organization dialog box, click the **Approve** button in the Organization details section to approve the request.
3. In the **Reason** box, type a reason for approving the request.
4. In the Included requests section, if there are other requests such as a claim, click the **Approve** or the **Reject** button to approve or reject the request, respectively. In the **Reason** box for the additional request, type a reason for approving or rejecting.
5. Click **Submit**.

   A message displays that you successfully submitted your decision.

   The approved New organization request is no longer listed in the New Organization requests list.

To reject a new organization request

1. In the New Organization requests page, after refining the listed records if needed, click the request whose details you want to view.

2. In the Request: New Organization dialog box, click the **Reject** button in the Organization details section to reject the request.

   > **Note:** If you click Reject for the organization request, all the included requests also get rejected and are removed from the request queue.

   In the Included requests section, the area with the requests becomes unavailable and cannot be edited.

3. In the **Reason** box, type a reason why you rejected the request.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

5.1.2 Service package requests

Security administrators and Exchange operators need to view all of the service package requests for their organization or across a realm, respectively, so that they can see the details of the requests and take appropriate action to meet the requests.

The Service package request tab lists all the service package requests and displays the related details in the following columns:

- **Requested by**: Name of the organization that made the request for the service package. You can click the column name to sort the items on the page in ascending or descending order.
- **Request Id**: ID of the service package request from the organization. You can click the column name to sort the items on the page in ascending or descending order.
- **Service Package Id**: Id of the service package that is requested. You can click the column name to sort the items on the page in ascending or descending order.
- **Reason**: the reason provided during the request for the service package
- **Creator ID**: ID of the user (administrator) who made the request
- **Requested Date**: Date and time of the request for the service package. You can click the column name to sort the items on the ascending or descending order.

Clicking a request item would open the request details in another dialog box. See "View , approve, or reject service package requests" on page 44.

5.1.2.1 Filter service package requests

As an administrator, you can filter or refine the list service package requests by organization to find specific ones or find ones using certain search criteria.

To filter or refine the list of service package requests

1. Make sure the Service package request tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one or both options to use as criteria to refine the list and only display the matching requests:
   - **Package ID**: Enter the ID of the requested service package.
   - **Requestor ID**: Enter the ID of the organization that made the service package request.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the Service package requests page. The fields used for the search are shown as tokens above the column names on the page. Nothing is shown if no matching requests are found.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

5.1.2.2 View , approve, or reject service package requests

Administrators can view the details of the requests they receive from organizations in the Request: Service package dialog box and then choose to either approve or reject those requests.

To view the details of a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: Service package dialog box displays the following details:
   - **Requester details**: This section shows the details such as name of the user making the request, user id, requester's organization name, requester email, requester phone number.
   - **Service package details**: This section shows the details of the request such as service package name, reason for the request provided by the requester, actions Approve and Reject buttons, and a text box to provide the reason for approving or rejecting the request.
   - **Included requests**: Displays other requests that could be a part of the service package requests such as claims. The section shows claim value Id, name of

the claim code, a reason for the request, action buttons Approve and Reject, and a text to provide the reason for rejecting the claim request.

To approve a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Service package dialog box, click the **Approve** button in the Service package details section to approve the request.
3. In the **Reason** box, type a reason for approving the request.
4. In the Included requests section, if there are other requests such as a claim, click the **Approve** or the **Reject** button to approve or reject the request, respectively. In the **Reason** box for the additional request, type a reason for rejecting.

   Note: If the claim is rejected for some reason, on submitting the changes, the application displays a message that the service package must be associated with atleast one claim value.

5. Click **Submit**.

   If everything is approved, then a message displays that you successfully submitted your decision.

   The approved service package request is no longer listed in the Service package requests list.

To reject a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Service package dialog box, click the **Reject** button in the Service package details section to reject the request.

   A warning displays the message that all the included requests would also get rejected and would be removed from the request queue.

   In the Included requests section, the area with the requests becomes unavailable and cannot be edited.

3. In the **Reason** box, type a reason why you rejected the request.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

5.1.3 Claim requests

Security administrators and Exchange operators need to view all of the claim and claim value requests for their organization or across a realm, respectively, so that they can see the details of the requests and take appropriate action to meet the requests.

The Claim requests tab lists all the claim requests for an SAO (Service Authority Organization) package and displays the related details in the following columns:

- **Requested by**: ID of the organization that made the request for the claim. You can click the column name to sort the items on the page in ascending or descending order.
- **Request Id**: ID of the claim request from the organization. You can click the column name to sort the items on the page in ascending or descending order.
- **Claim Code**: Claim name. You can click the column name to sort the items on the page in ascending or descending order.
- **Claim Value**:ID of the claim value. You can click the column name to sort the items on the page in ascending or descending order.
- **Service Package Id**: Id of the service package that is requested. You can click the column name to sort the items on the page in ascending or descending order.
- **Justification**: the reason provided during the request for the claim
- **Requested Date**: Date and time of the request for the claim. You can click the column name to sort the items on the ascending or descending order.

Clicking a request item would open the request details in another dialog box. See “View , approve, or reject claim requests” on page 47.

5.1.3.1 Filter claim requests

As an administrator, you can filter or refine the list claim requests by organization to find specific ones or find ones using certain search criteria.

To filter or refine the list of claim requests

1. Make sure the Claim requests tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one, some, or all the options to use as criteria to refine the list and only display the matching requests:
   - **Claim ID**: Enter the ID of the requested claim.
   - **Package ID**: Enter the ID of the service package that includes the requested claim.
   - **Claim Value ID**: Enter the ID of the claim value.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

The matching records are listed in the Claim requests page. The fields used for the search are shown as tokens above the column names on the page. Nothing is shown if no matching requests are found.

- Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
- Click **Close** to close the Refine by pane.

5.1.3.2 View , approve, or reject claim requests

Administrators can view the details of the claim requests they receive from organizations in the Request: Claim dialog box and then choose to either approve or reject those requests.

To view the details of a claim request

1. In the Claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: Claim dialog box displays the following details:
   - **Requester Details**: This section shows the details such as name of the user making the request, user id, , requester email and phone number, requester's organization Id and name.
   - **Claim Details**: This section shows the details of the claim request such as claim code, request creation date, service package Id, service package claim id, service package claim type, and the phase in which the claim request is in such as pending security admin approval.
   - **Included requests**: Displays the claim name which shows the claim value Id, a reason for the request, action buttons Approve and Reject, and a text box to provide the reason for rejecting the claim request.

To approve a claim request

1. In the claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Claim dialog box, to approve the request for the listed claim value Id, the **Approve** action button needs to be selected. In this case, the Approve button is selected by default.
3. In the **Reason** box, type a reason for approving the request if you want. It is not required though.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

   The approved claim item is no longer listed in the Claim requests list.

To reject a claim request

1. In the claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Claim dialog box, to reject the request, click the **Reject** button in the Included requests section for the listed claim value Id.
3. In the **Reason** box, type a reason why you rejected the request. If a reason is not provided, then on submission, a message displays that a reason is mandatory when you reject a claim request.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

   The rejected claim item is no longer listed in the Claim requests list.

5.2 Manage User Requests

Administrators can manage all of the user requests, associated to the organization requests, such as requests for registration, service packages, and claims on the My Tasks page in IAM Administration. Make sure the toggle control is set to User requests in the My Tasks page.

To change toggle control to User requests

- In the **My Tasks** page, click the toggle control to switch to User requests if the toggle is set to Organization requests.

When the toggle is set to User requests, the page displays the following three tabs and each tab displays the number of pending requests:

- New user requests
- Service package requests
- Claim requests

5.2.1 New user requests

The New user requests tab lists all the new user registration requests and displays the following details about the requests:

- **Requested Id**: ID of the administrator who made the request and is registered along with the organization or Is this ID of the request for the new organization registration. You can click the column name to sort the items on the page in ascending or descending order.
- **Registrant Id**: ID of the user that is created in the API when a new organization is registered. When a new organization is registered, first a user is created in the API. Registrant ID is the ID of this user. This user is granted the security administrator role for the organization being registered.

- **Reason for request**: the reason provided during the request for the new organization registration.
- **Request Date**: Date and time of the request for the new organization registration

Clicking a request item would open the request details in another dialog box. See "View , approve, or reject new user requests" on page 50.

5.2.1.1 Filter new user requests

As an administrator, you can filter or refine the list of new user requests to find specific ones or find ones using certain search criteria.

To filter or refine the list of new user requests

1. Make sure the New user requests tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one, some, or all of the following options to use as criteria to refine the list and only display the matching requests:
   - **Registrant ID**: Enter the ID of the user that is created in the API when a new organization is registered.
   - **Start Date**: Use the Start Date and End Date fields to search for requests made during a specific time frame. Click the calendar icon and select a date as a start date for the search.
   - **End Date**: Click the calendar icon and select a date as the end date for the search time frame. If no date is selected, the current date is used as the end date.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the New Organization requests page. The fields used for the search are shown as tokens above the column names on the page.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page again.
   - Click **Close** or the **Filter** icon to close the Refine by pane.

5.2.1.2 View , approve, or reject new user requests

Administrators can view the details of the user requests in the Request: New user dialog box and then choose to either approve or reject those requests.

To view the details of a new user request

1. In the New user requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: New user dialog box displays the following details:

   Note: Fields marked with an asterisk are mandatory.

   - **Person details**: This section shows details of the user such as name, user ID, phone and email address, status of the request, and creation date and time of the request.
   - **Request details**: This section shows the details of the request such as requester name (same as name in the Person details section), reason for the request provided by the requester, action buttons Approve and Reject, and a text box to provide the reason for approving or rejecting the request.
   - **Included requests**: Displays other requests such as service packages, claims, claim code, a reason for the request, action buttons Approve and Reject, and a text box to provide the reason for rejecting the request.

To approve a new user request

1. In the New user requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: New user dialog box, to approve the request, the **Approve** button in the Request details section needs to be selected. The Approve button is selected by default.
3. In the **Reason** box, type a reason for approving the request.
4. In the Included requests section, if there are other requests such as a service package or a claim, click the **Approve** or the **Reject** button to approve or reject the request, respectively. In the **Reason** box for the additional request, type a reason for approving or rejecting.
5. Click **Submit**.

   A message displays that you successfully submitted your decision.

   The approved New organization request is no longer listed in the New Organization requests list.

To reject a new user request

1. In the New user requests page, after refining the listed records if needed, click the request whose details you want to view.

2. In the Request: New user dialog box, click the **Reject** button in the Request details section to reject the request.

   A warning displays the message that all the included requests would also get rejected and would be removed from the request queue.

   In the Included requests section, the area with the requests becomes unavailable and cannot be edited.

3. In the **Reason** box, type a reason why you rejected the request.

4. Click **Submit**.

   A message displays that you successfully submitted your decision.

5.2.2 Service package requests

Security administrators and Exchange operators need to view all of the service package requests for their organization or across a realm, respectively, so that they can see the details of the requests and take appropriate action to meet the requests.

The Service package request tab lists all the service package requests and displays the related details in the following columns:

- **Requested by**: ID of the user (administrator) who made the request for the service package and is registered along with the organization. You can click the column name to sort the items on the page in ascending or descending order.
- **Request Id**: ID of the service package request from the organization. You can click the column name to sort the items on the page in ascending or descending order.
- **Service Package Id**: Id of the service package that is requested. You can click the column name to sort the items on the page in ascending or descending order.
- **Reason**: the reason provided during the request for the service package
- **Requested Date**: Date and time of the request for the service package. You can click the column name to sort the items on the ascending or descending order.

Clicking a request item would open the request details in another dialog box. See "View , approve, or reject service package requests" on page 52.

5.2.2.1 Filter service package requests

As an administrator, you can filter or refine the list service package requests by organization to find specific ones or find ones using certain search criteria.

To filter or refine the list of service package requests

1. Make sure the Service package request tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one or both options to use as criteria to refine the list and only display the matching requests:
   - **Package ID**: Enter the ID of the requested service package.
   - **Requestor ID**: ID of the user (administrator) who made the request for the service package and is registered along with the organization.
   - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

     The matching records are listed in the Service package requests page. The fields used for the search are shown as tokens above the column names on the page. Nothing is shown if no matching requests are found.
   - Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
   - Click **Close** to close the Refine by pane.

5.2.2.2 View , approve, or reject service package requests

Administrators can view the details of the requests they receive from organizations in the Request: Service package dialog box and then choose to either approve or reject those requests.

To view the details of a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: Service package dialog box displays the following details:
   - **Requester details**: This section shows the details such as name of the user making the request, user id, requester's organization name, requester email, and requester phone number.
   - **Service package details**: This section shows the details of the request such as service package name, reason for the request provided by the requester, action buttons Approve and Reject, and a text box to provide the reason for approving or rejecting the request.
   - **Included requests**: Displays other requests that could be a part of the service package requests such as claims. The section shows claim value Id, name of

the claim code, a reason for the request, action buttons Approve and Reject, and a text to provide the reason for rejecting the claim request.

To approve a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Service package dialog box, to approve the request, the **Approve** button in the Service package details section needs to be selected. The Approve button is selected by default.
3. In the **Reason** box, type a reason for approving the request.
4. In the Included requests section, if there are other requests such as a claim, click the **Approve** or the **Reject** button to approve or reject the request, respectively. In the **Reason** box for the additional request, type a reason for rejecting.

   Note: If the claim is rejected for some reason, on submitting the changes, the application displays a message that the service package must be associated with atleast one claim value.

5. Click **Submit**.

   If everything is approved, then a message displays that you successfully submitted your decision.

   The approved service package request is no longer listed in the Service package requests list.

To reject a service package request

1. In the Service package requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Service package dialog box, click the **Reject** button in the Service package details section to reject the request.

   If there are requests in the Included requests section, awarning displays the message that all the included requests would also get rejected and would be removed from the request queue.

   In the Included requests section, the area with the requests becomes unavailable and cannot be edited.

3. In the **Reason** box, type a reason why you rejected the request.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

5.2.3 Claim requests

Security administrators and Exchange operators need to view all of the claim and claim value requests for their organization or across a realm, respectively, so that they can see the details of the requests and take appropriate action to meet the requests.

The Claim requests tab lists all the claim requests for an SAO (Service Authority Organization) package and displays the related details in the following columns:

- **Requested by**: ID of the user (administrator) who made the claim request for the service package and is registered with the organization. You can click the column name to sort the items on the page in ascending or descending order.
- **Request Id**: ID of the claim request from the user. You can click the column name to sort the items on the page in ascending or descending order.
- **Claim Code**: Claim name. You can click the column name to sort the items on the page in ascending or descending order.
- **Claim Value**:ID of the claim value. You can click the column name to sort the items on the page in ascending or descending order.
- **Service Package Id**: Id of the service package that is requested. You can click the column name to sort the items on the page in ascending or descending order.
- **Justification**: the reason provided during the request for the claim
- **Requested Date**: Date and time of the request for the claim. You can click the column name to sort the items on the ascending or descending order.

Clicking a request item would open the request details in another dialog box. See “View , approve, or reject claim requests” on page 55.

5.2.3.1 Filter claim requests

As an administrator, you can filter or refine the list of claim requests by users to find specific ones or find ones using certain search criteria.

To filter or refine the list of claim requests

1. Make sure the Claim requests tab is selected and click **Filter** on the page.
2. In the Refine by pane, use one, some, or all the options to use as criteria to refine the list and only display the matching requests:
    - **Claim ID**: Enter the ID of the requested claim.
    - **Package ID**: Enter the ID of the service package that includes the requested claim.
    - **Claim Value ID**: Enter the ID of the claim value.
    - Click **Filter** to start the process to search for the records that match the criteria your provided in the Refine by pane.

The matching records are listed in the Claim requests page. The fields used for the search are shown as tokens above the column names on the page. Nothing is shown if no matching requests are found.

- Click the **X** in individual tokens to remove that filter and re-run the search and display the adjusted matching list again or click **Clear All** to remove all the filters and display all the records on the page.
- Click **Close** or the **Filter** icon to close the Refine by pane.

5.2.3.2 View , approve, or reject claim requests

Administrators can view the details of the claim requests they receive from users in the Request: Claim dialog box and then choose to either approve or reject those requests.

To view the details of a claim request

1. In the Claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. The Request: Claim dialog box displays the following details:
    - **Requester Details**: This section shows the details such as name of the user making the request, user id, , requester email and phone number, requester’s organization Id.
    - **Claim Details**: This section shows the details of the claim request such as claim code, request creation date, service package Id, service package claim id, service package claim type, and the phase in which the claim request is in such as pending security admin approval.
    - **Included requests**: Displays the claim name which shows the claim value, a reason for the request, action buttons Approve and Reject, and a text box to provide the reason for rejecting the claim request.

To approve a claim request

1. In the claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Claim dialog box, to approve the request for the listed claim value, the **Approve** action button needs to be selected. In this case, the Approve button is selected by default.
3. In the **Reason** box, type a reason for approving the request if you want. It is not required though.
4. Click **Submit**.

    A message displays that you successfully submitted your decision.

    The approved claim item is no longer listed in the Claim requests list.

To reject a claim request

1. In the claim requests page, after refining the listed records if needed, click the request whose details you want to view.
2. In the Request: Claim dialog box, to reject the request, click the **Reject** button in the Included requests section for the listed claim value.
3. In the **Reason** box, type a reason why you rejected the request. If a reason is not provided, then on submission, a message displays that a reason is mandatory when you reject a claim request.
4. Click **Submit**.

   A message displays that you successfully submitted your decision.

   The rejected claim item is no longer listed in the Claim requests list.