



Approving Access in CU Identity Manager

This guide will walk you through how to make a request for yourself or another user in CU Identity Manager.

CU Identity Manager Links

To log in use your campus login and password: [Log Into CU Identity Manager](#).

For more information about the application, please visit the [CU Access page for Identity Manager](#).

For Support with CU Identity Manager

For questions or support related to CU Identity Manager functionality contact the [UIS Service Desk](#) or [Access Management](#).

Manager/Sponsor Role in Approving Access

If you are a direct manager of an employee or the sponsor of a Type 15 Person of Interest (POI), you are responsible for approving access for your employee(s) or POI(s).

NOTE: For POIs ONLY POI type 15 can request access to a CU application or IT resource.

Training Requirements

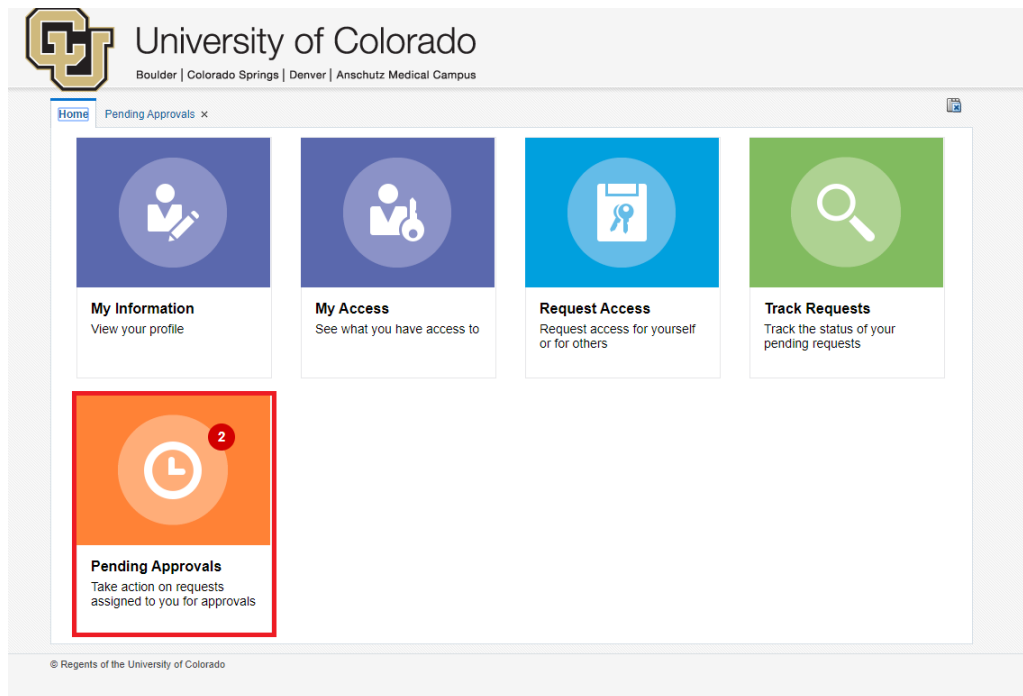
CU Identity Manager will perform checks for training to ensure required training has been completed for each requested entitlement. The request(s) will fail if training requirements have not been fulfilled and will not be assigned to the manager. Training is checked against SkillSoft directly and against the HCM database for In-Person courses.

NOTE: Training will need to show as completed in SkillSoft and/or HCM in order for you to receive access to University Systems. Any training not recorded in these systems will not be sufficient for access to be granted.

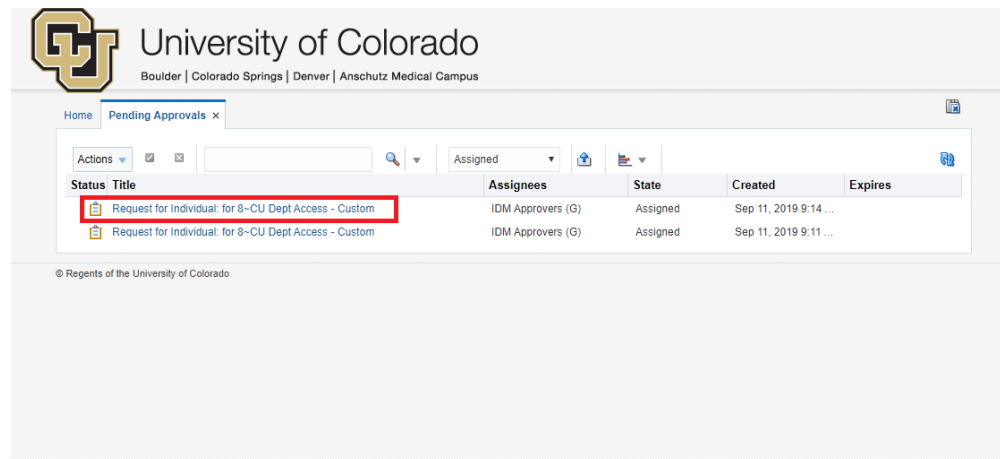


Request Approval Process

1. You should receive an email for any requests entered by employees of POIs for which you are the manager/sponsor. You will receive an email for EACH entitlement requested and must approve or deny each one individually.
2. You may click on the link in the email or log directly into CU Identity Manager.
3. From the home screen, you can see your count of approvals in the Pending Approval tile. To view your Pending Approvals, select the Pending Approval tile.



4. A new tab called "Pending Approvals" will open. Select the request that you need to review from the list provided.





5. The request will open and display either the “Approvals” tab or the “Request Details” tab. Below is the “Approvals” tab.

The screenshot shows a web interface for a request titled "Request for Individual: for 8~CU Dept Access - Custom". The "Approvals" tab is selected and highlighted with a red box. The interface includes a "Summary Information" section with the following details:

- Request Id: 80003
- Requested Date: 9/11/2019
- Justification: I need this access to complete duties required of my job. Custom department access required to include departments 51000 and 52000.
- Requester: Ron Swanson
- Status: Request Awaiting Approval
- Request Type: Provision Entitlement

Below the summary is a "History" section with a table of approval steps:

Step	Step Name	Approvers	Action	Date
1	Manager Approval	IDM Approvers, Sean Welshimer	Assigned	9/11/19 9:11 AM
1.1		Ron Swanson		
2	Campus Security Co-ordinator			

A workflow diagram below the table shows the sequence: Manager Approval → IDM Approvers, Sean Welshimer → Campus Security Co-ordinator.

This tab shows the current status of the approval and where the request is in the workflow. If you are the user’s manager, request history should show the request is pending Manager Approval. If you are the Access Coordinator for the request, request history should show Manager Approval as “Approved” and Campus Security Coordinator as “Assigned”.

1	Manager Approval	IDM Approvers, Approver Name ManagerApproval	Approved	9/24/19 12:57 PM
1.1		Requestor		
2	Campus Security Co-ordinator	HCM Access Coordinator - System, IDM Approvers - Camp	Assigned	9/24/19 12:57 PM
2.1		Requestor		



The “Request Details” tab shows information about the request, including the target user, related requests (particularly for grouped requests), and the entitlements requested.

The screenshot displays the 'Request for Individual: for 8~CU Dept Access - Custom' page. At the top, there are navigation tabs: 'Home', 'Pending Approvals x', and 'Request for Individual: ... x'. The main content area includes a 'Task Actions' dropdown with 'Approve' and 'Reject' buttons. Below this is a 'Details' section with a 'Summary Information' tab. The summary information includes: Request Id (80003), Requester (Ron Swanson), Requested Date (9/11/2019), Status (Request Awaiting Approval), Justification (I need this access to complete duties required of my job. Custom department access required to include departments 51000 and 52000.), Parent Request ID, and Request Type (Provision Entitlement). A red box highlights the 'Request Details' tab. Below the summary information are sections for 'Target Users' (showing Ron Swanson with email test.email@cu.edu), 'Related Requests' (No data to display), 'Cart Details' (with an 'Update' button), 'Cart Items' (showing HCM : CU Dept Access - Custom with Target Account: RAND000546), 'Request Details' (HCM : CU Dept Access - Custom), and 'Grant Duration'.



6. Before approving or rejecting the request, you must claim the request. Select “Claim” in the top right of the page to claim the request to allow you to interact with the request.

Request for Individual: for 8-CU Dept Access - Custom

Task Actions **Claim**

Summary Information

Request Id	80003	Requester	Ron Swanson
Requested Date	9/11/2019	Status	Request Awaiting Approval
Justification	I need this access to complete duties required of my job. Custom department access required to include departments 51000 and 52000.		
	Parent Request ID		
	Request Type	Provision Entitlement	

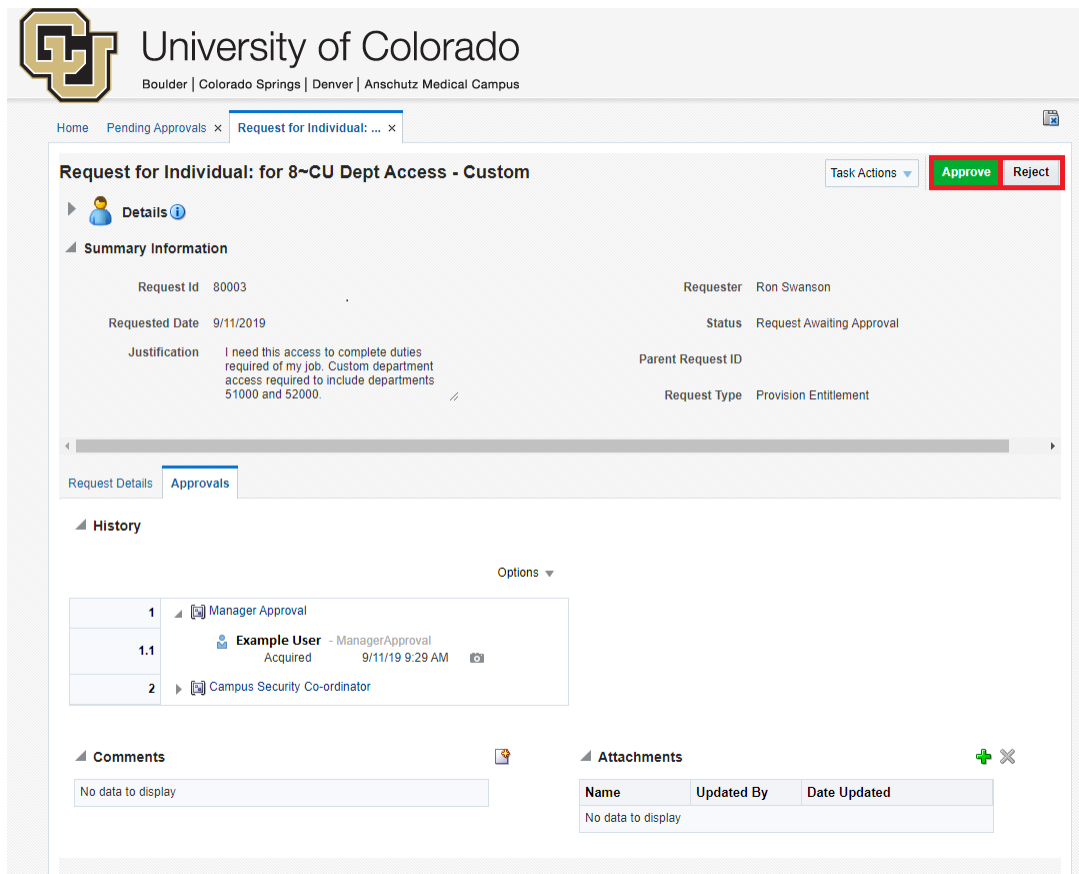
History

1	Manager Approval
1.1	IDM Approvers, Sean Welshimer - ManagerApproval Assigned 9/11/19 9:11 AM Ron Swanson
2	Campus Security Co-ordinator

Manager Approval
IDM Approvers, Sean Welshimer - ManagerApproval
Campus Security Co-ordinator

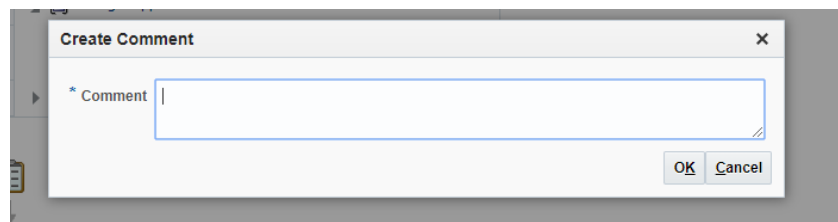


7. Once claimed, you can Approve or Reject the request.



To Approve the request, click the “Approve” button. The request will then be routed to the appropriate campus and application Access Coordinator for approval. Once Access Coordinator approval is complete (and any other approvals listed in the Approval History section), the entitlement will be provisioned to the user.

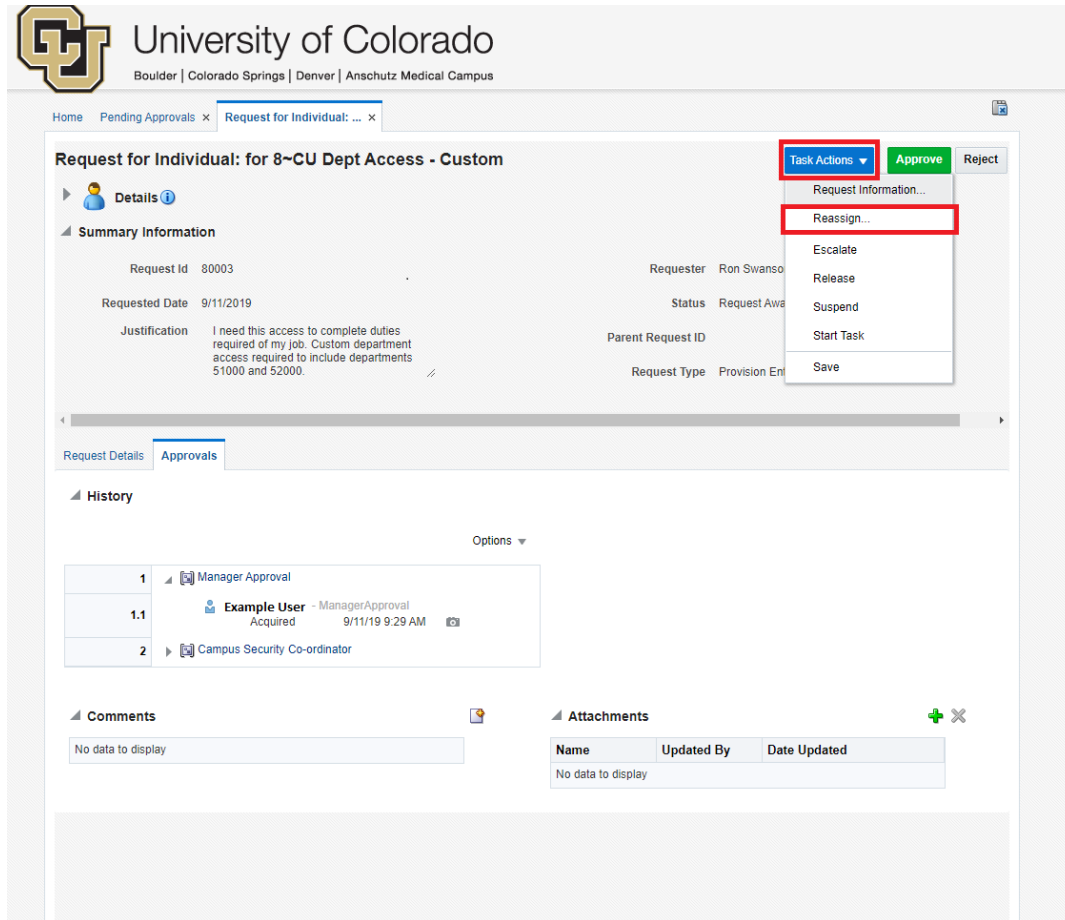
To reject a request, a comment is required to explain why the request is being rejected. To add a comment, select the “add comment” icon at the top right of the “Comments” section in the bottom left of the Approvals tab. If you do not see the comments section, scroll down, as the comments section might be below what your screen resolution is showing. Selecting the “add comment” icon will open a popup to add a comment.



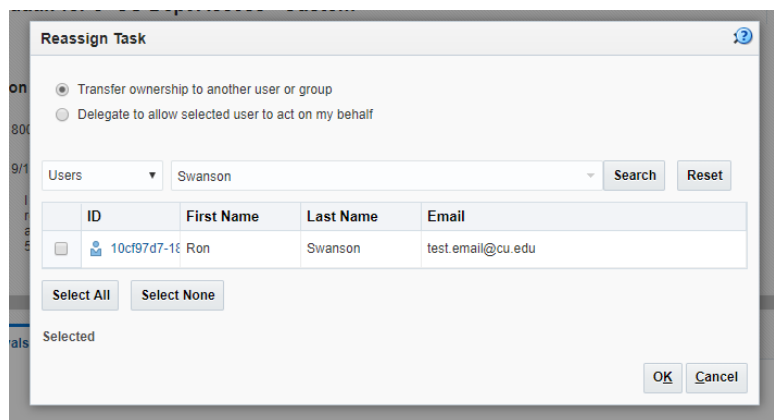
After a comment is added, select “Reject” to reject the request. A notification will be sent to the requestor and target user.



7. To reassign a request, select the “Task Actions” dropdown and select “Reassign”.



A window will open with prompts to search for a user. When reassigning, search for the user by entering the user’s first name, last name, **OR** email address. **DO NOT** use the prompts that appear after clicking into the search box, as these will result in an error.





Select the check box beside the user whom you want to reassign the request to. The user's ID should appear in the "Selected" section. After selecting a user, you **MUST** add IDM Approvers to the request. To do this, select the dropdown to the left of the search bar and select "Groups". Enter "IDM Approvers" in the search bar and select "Search". Check the box next to the IDM Approvers group and validate that this group has been added to the "Selected" section at the bottom of the window.

Reassign Task

Transfer ownership to another user or group
 Delegate to allow selected user to act on my behalf

Groups: IDM Approvers [Search] [Reset]

	ID	First Name	Last Name	Email
<input checked="" type="checkbox"/>	IDM Approvers			

[Select All] [Select None]

Selected: 10cf97d7-181c-11e6-80fe-005056941ada [X] IDM Approvers [X]

[OK] [Cancel]

After **BOTH** the new owner and IDM Approvers have been added to the "Selected" box, select "OK". The request will be reassigned to the new owner and will no longer appear in your approval queue.

8. To review a request after approving, rejecting, or reassigning it, select the "Track Requests" tab on the home screen and use the Request Id value to search for the request.

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Home

- My Information**
View your profile
- My Access**
See what you have access to
- Request Access**
Request access for yourself or for others
- Track Requests**
Track the status of your pending requests
- Pending Approvals**
Take action on requests assigned to you for approvals

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