

Multiple Approvers with Implementation – Customization Guide

The purpose of this guide is to inform the reader how to create a customized workflow within CA Identity Manager for use within the CA Identity Portal access request system.

The use case is requesting access to an application that is considered very sensitive and requires three approvals. Following the three approvals, the request is sent to a group of administrators to perform the manual provisioning.

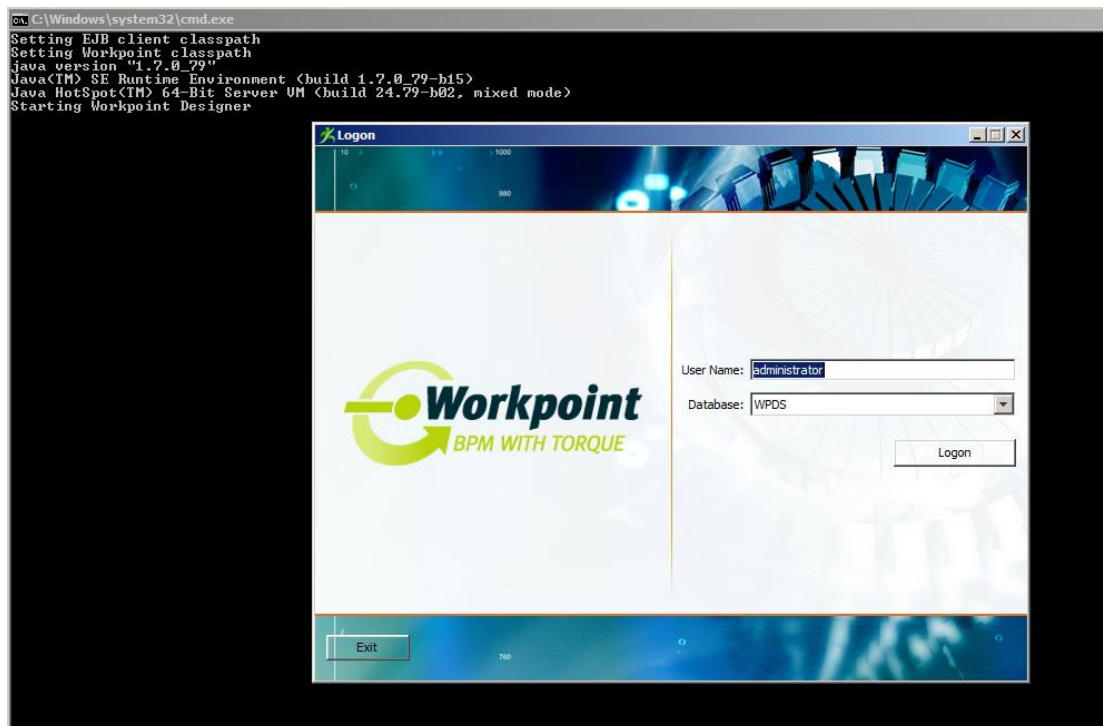
For this scenario, we have three approvers:

- Manager: dynamically resolved based on the Manager ID of the requestor
- Risk Manager: hard coded to a user
- Human Resources: hard coded to a user

After approval, members of a CA Identity Manager group can implement.

The application will be called “Really Sensitive Application”.

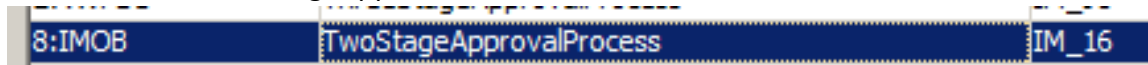
This guide assumes that Workpoint Designer has been installed and configured. If using the CA Identity Suite Virtual Appliance, Workpoint Designer can be installed as part of the Virtual Appliance Remote Tools.



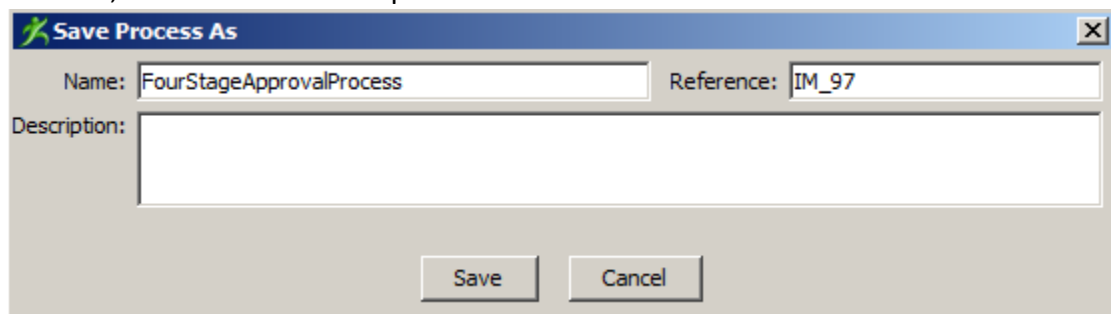
Create Custom Workflow

In this section, we'll create a new custom workflow. In this case, we'll create a copy of

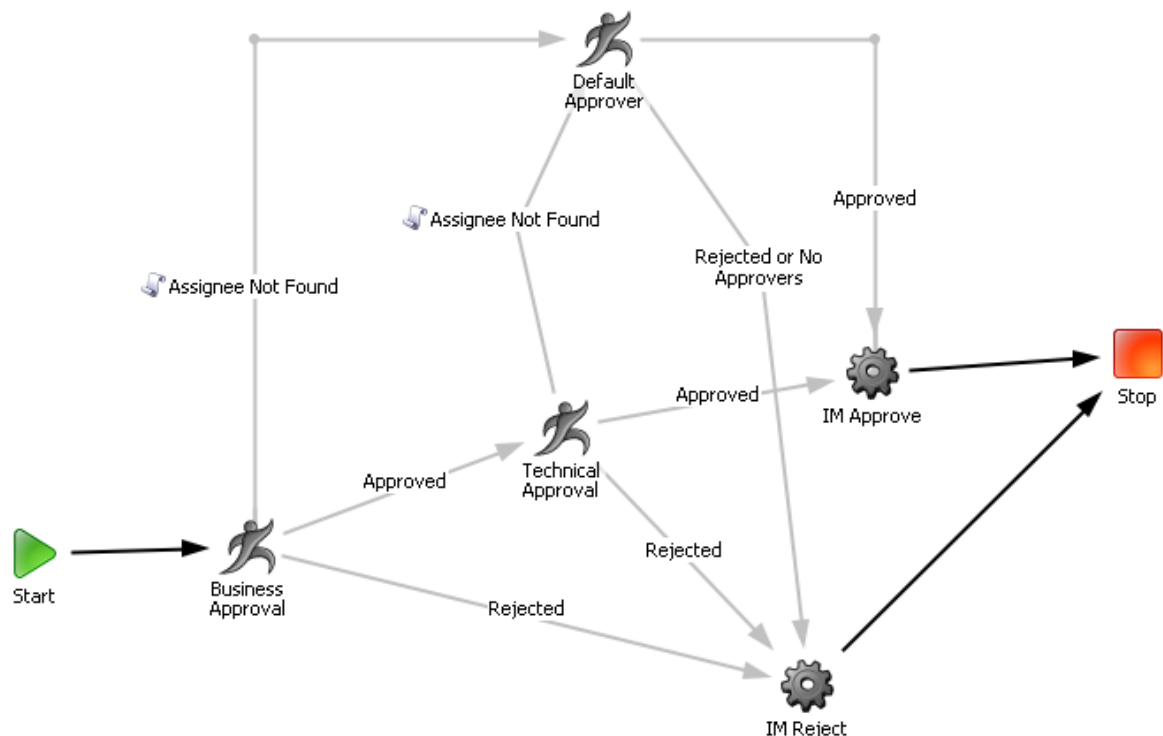
1. After logging on to Workpoint Designer, click Open Process
2. Sort the workflows by Reference
3. Note the highest reference ID. You'll need this when saving your process.
4. Double click on TwoStageApprovalProcess – 8:IMOB



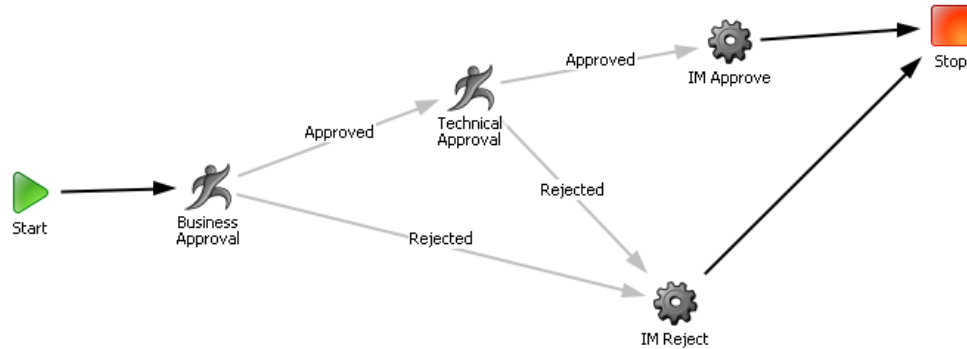
5. The process opens. Click File > Save As. Create a new name and change the Reference to IM_xx (where xx is one more than your highest workflow). Alternatively, pick a big number; this needs to be unique to the other workflows defined. Click Save.



6. Now you have your very own workflow to modify.



7. In this example, we're going to simplify the workflow by removing the "Assignee Not Found" flows. The easiest way to do this is to delete the Default Approver node. Alternatively, you can keep this check by adding the nodes in the following steps.



8. Double click the Business Approval node. In the General tab, rename it to "Manager Approval"

Activity Properties (Process) - Manager Approval

Mail	Alerts	User Data	Description	Milestones	Completion Code	Priority
General		Resources	Duration		State Rules	Agents

Name: Manager Approval

☐ Automated

☐ Allow server to complete this activity

Activity ID: 29:WPDS

Node ID: 31:WPDS

UUID: 4d2c68d2-026d-4fca-af99-75e811fb3746

Iteration Limit:

☐ Enforce outbound transition selection

☐ Put Job in error state if no transitions are selected

☐ Emit State Change Events

Work Item Form:

Check Syntax Rule:

User References:

Help OK Cancel Apply

9. The Resources tab should have IM Approvers in the Include box.

The screenshot shows the 'Activity Properties (Process) - Manager Approval' dialog box with the 'Resources' tab selected. The 'Assignment' section on the left has the 'Any' radio button selected. Under 'In Case of Ties', the 'Let Any Participant Open' radio button is selected. Under 'Subset', the 'Percent' radio button is selected with a value of 100. The 'Include' list on the right contains 'IM Approvers'. The 'Exclude' list is empty. The 'Select...' button is visible next to both lists. The 'Help', 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

10. The Agents tab should have Nobody AutoComplete in the Asynchronous Box.

The screenshot shows the 'Activity Properties (Process) - Manager Approval' dialog box with the 'Agents' tab selected. The 'Available' list on the left contains 'EvaluateProvisioningRoleActions', 'Nobody AutoComplete', 'Notify IM Approve', and 'Notify IM Reject'. The 'Synchronous' box on the right is empty. The 'Asynchronous' box on the right contains 'Nobody AutoComplete'. The 'Run Order' button is visible next to both boxes. The 'Help', 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

11. Under the User Data tab, change the following (note: the name is the one displayed in the Request status box. Change to meet your needs):
- PARTICIPANT_DESCRIPTION = Manager Approval
 - PARTICIPANT_ID = managerapproval
 - PARTICIPANT_NAME = Manager Approval

Name	Value
ACTION_PERFORMED	none
ASSIGNEES_REQUIRED	NO
INITIAL_ASSIGNEE_COUNT	0
PARTICIPANT_DESCRIPTION	Manager Approval
PARTICIPANT_ID	managerapproval
PARTICIPANT_NAME	Manager Approval

12. All other tabs should be blank. Click Apply and OK.
13. Next double click the Technical Approval node.
14. Rename the node in the General tab to: Risk Manager Approval.
15. Validate the Resources and Agents tabs are configured as above.

16. Under the User Data tab, change the following:
 - a. PARTICIPANT_DESCRIPTION = Risk Manager Approval
 - b. PARTICIPANT_ID = riskmanagerapproval
 - c. PARTICIPANT_NAME = Risk Manager Approval

The dialog box shows the 'User Data' tab with a table of user data. The table has two columns: 'Name' and 'Value'. The data is as follows:

Name	Value
ACTION_PERFORMED	none
ASSIGNEES_REQUIRED	NO
INITIAL_ASSIGNEE_COUNT	0
PARTICIPANT_DESCRIPTION	Risk Manager Approval
PARTICIPANT_ID	riskmanagerapproval
PARTICIPANT_NAME	Risk Manager Approval

At the bottom of the dialog box, there are buttons for 'Add', 'Edit', and 'Delete'. The 'Apply' button is also visible at the bottom right.

17. Click Apply and OK.
18. Next, click the Activity Node icon on the menu bar



19. Next, click somewhere on the white space in your workflow screen.
20. This will drop a new node. Double click this node to configure.

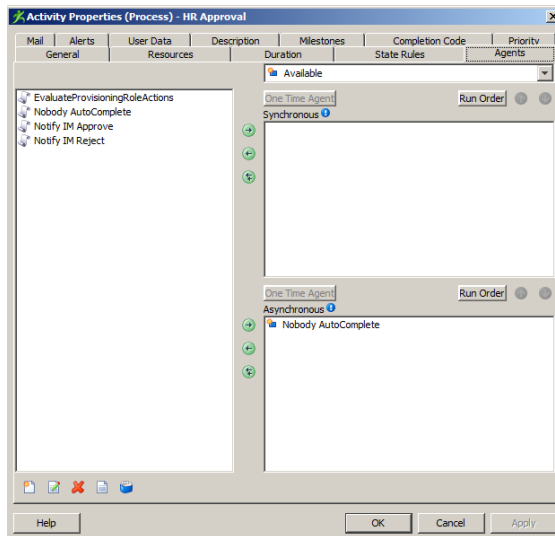
21. In the General tab, name it HR Approval.

The screenshot shows the 'Activity Properties (Process) - HR Approval' dialog box with the 'General' tab selected. The 'Name' field is set to 'HR Approval'. Below it, there are checkboxes for 'Automated' and 'Allow server to complete this activity'. The 'Activity ID' is '30:WPDS', 'Node ID' is '32:WPDS', and 'UUID' is 'a4727986-9b02-4c08-af36-5b3bc0788c1c'. There is an 'Iteration Limit' field. Below these are checkboxes for 'Enforce outbound transition selection', 'Put Job in error state if no transitions are selected', and 'Emit State Change Events'. There are also fields for 'Work Item Form' and 'Check Syntax Rule'. At the bottom, there are 'User References' fields. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom right.

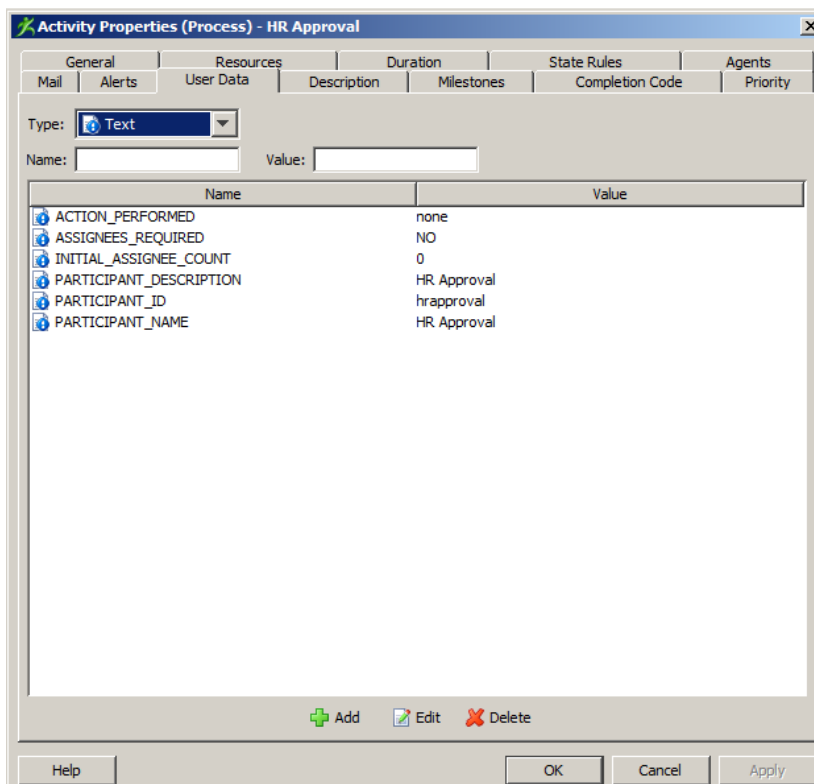
22. In the Resources tab, add IM Approvers to the Include box.

The screenshot shows the 'Activity Properties (Process) - HR Approval' dialog box with the 'Resources' tab selected. The 'Assignment' section has radio buttons for 'Any', 'Lightest Work Load', 'All', 'Subset', and 'External'. Under 'Any', there are options for 'In Case of Ties': 'Let Any Participant Open', 'Randomly Assign', and 'First Participant Listed'. Under 'All', there are options for 'To Do Concurrently' and 'To Do Consecutively'. Under 'Subset', there are options for 'Work Items To Complete': 'Percent' and 'Number'. The 'Include' box contains 'IM Approvers' and a 'Select...' button. The 'Exclude' box is empty and has a 'Select...' button. The 'Help', 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

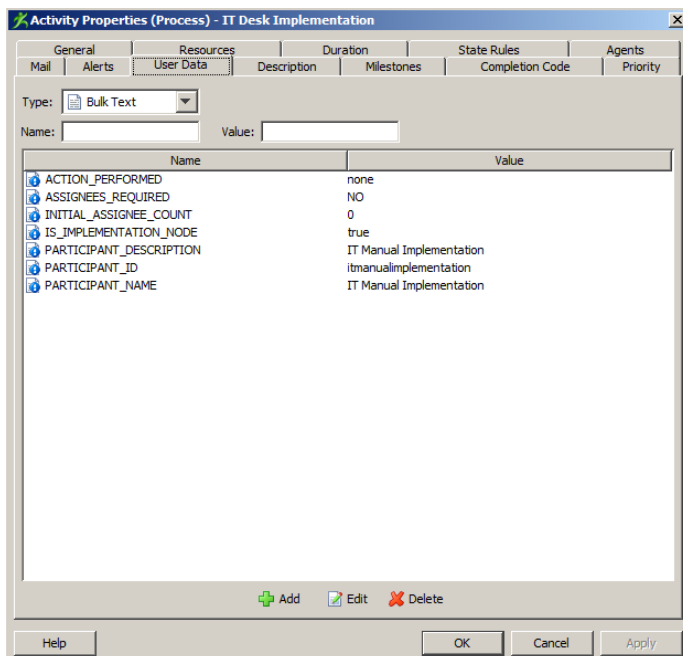
23. In the Agents tab, add Nobody AutoComplete in the Asynchronous Box



24. In the User Data tab, add the following attributes by changing Type to “Text”, typing in the name and value, then click Add.
- ACTION_PERFORMED = none
 - ASSIGNEES_REQUIRED = NO
 - INITIAL_ASSIGNEE_COUNT = 0
 - PARTICIPANT_DESCRIPTION = HR Approval
 - PARTICIPANT_ID = hrapproval
 - PARTICIPANT_NAME = HR Approval



25. Leave the other tabs as is and click Apply and OK.
26. Move the existing transition between the Risk Manager Approval node and IM Approve by clicking and dragging the arrow. The flow should go from Risk Manager Approval node to the HR Approval node.
27. Repeat the same process for creating the IT Desk Implementation node (steps 18 through 25) with one added step:
 - a. In the User Data tab, add the following property of Type Text:
IS_IMPLEMENTATION_NODE = true
 - i. This will tell the Identity Portal to put this step under the Implementation tab versus the Approval tab in My Tasks.

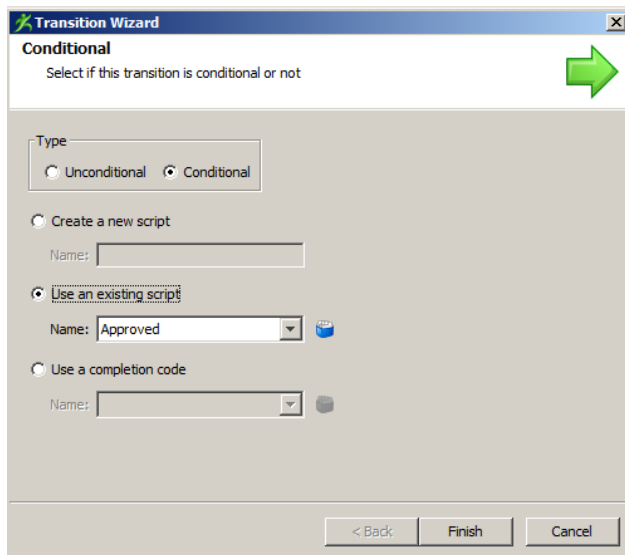


Name	Value
ACTION_PERFORMED	none
ASSIGNEES_REQUIRED	NO
INITIAL_ASSIGNEE_COUNT	0
IS_IMPLEMENTATION_NODE	true
PARTICIPANT_DESCRIPTION	IT Manual Implementation
PARTICIPANT_ID	itmanualimplementation
PARTICIPANT_NAME	IT Manual Implementation

28. Go to the menu bar and click the transition button:

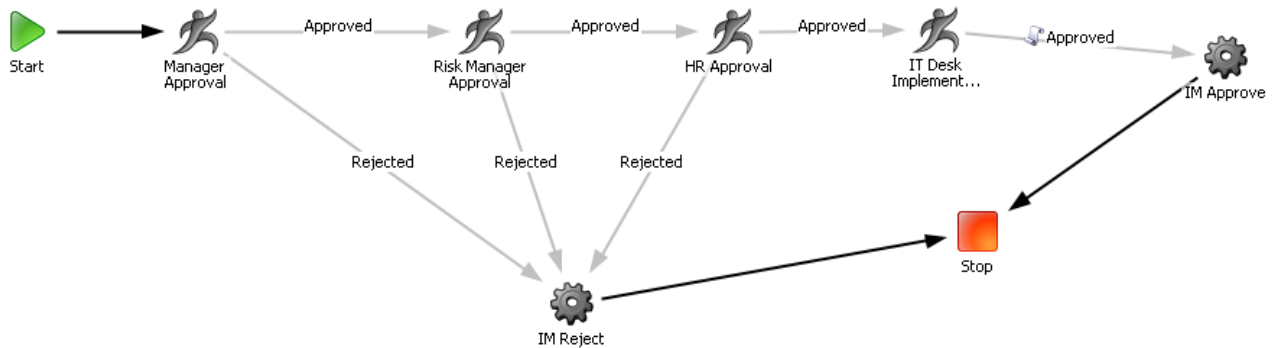


29. Click on the HR Approval node and drag to the IT Desk Implementation node. The transition wizard window will open. Make the following configurations:
- Type = Conditional
 - Use an existing script = Approved
 - Click Finish



The image shows the 'Transition Wizard' dialog box in Workpoint Designer. The title bar says 'Transition Wizard'. The main heading is 'Conditional' with a subtitle 'Select if this transition is conditional or not'. There is a green arrow icon in the top right corner. Under the 'Type' section, the 'Conditional' radio button is selected. Under the 'Use an existing script' section, the 'Name' dropdown is set to 'Approved'. At the bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'.

30. Repeat step 29 to create the exact same transition from the IT Desk Implementation node to the IM Approve node. Your workflow should look like this (without the default approver flows):



31. Click File > Save.
32. Close Workpoint Designer

CA Identity Manager Configuration

There are multiple items to configure within CA Identity Manager. In this example, we'll leverage an empty Provisioning Role that we'll be requesting. Since this is a manual implementation, no account template or automated provisioning will take place.

Create Provisioning Role

1. Navigate to: Roles and Tasks > Provisioning Roles > Create Provisioning Role > Create a new provisioning role
2. Under the Profile Tab, write in the Name: [SIGMA] Really Sensitive Application
3. Under the Owner Tab, define an owner
e.g. who are members of (admin role "System Manager")
4. Under the Administrators Tab, define an Admin Policy for all
5. Click Submit

Create Help Desk Group

1. Groups > Create Group > Create a new group
2. In the Profile Tab:
 - a. Org Name: click Browse and select northamerica
 - b. Group Name: Help Desk
3. In the Membership Tab:
 - a. Click Add a user
 - b. Select the following users: hiran01, ortra01, turta01
4. Under the Administrators Tab:
 - a. Add a user and select superuser

Create Implement “Approval” Admin Task

1. Navigate to: Roles and Tasks > Admin Tasks > Create Admin Task > Create a copy ...
2. Create Copy of Approve Request Access
3. Under the Profile Tab:
 - a. Rename the task to: Implement Request Access.
 - b. Rename the tag to: ImplementRequestAccess
4. Under the Tabs Tab:
 - a. Add a new Tab of type Profile (UserProfile)

Modify Admin Task: Implement Request Access

Profile Search **Tabs** Fields Events Role Use

Which tab controller should be used for this task?

Which tabs should appear in this task?

Tab	Tag	Type	
ImplementProfile	ImplementProfile	Profile	
Profile	Approve	Profile	
Approvers	Assignees	Assignees	
View Job	JobView	View Job	

- Administrators (GenericAdmins)
- Assignees (WorkItemAssignees)
- External Tab (ExternalTab)
- History Profile (HistoryProfile)
- JSP (JSP)
- Owners (GenericOwners)
- Profile (AccountProfile)
- Profile (AccountTemplateProfile)
- Profile (EndpointProfile)
- Profile (Generic) (ObjectProfile)
- Profile (UserProfile)**
- Profile (UserServiceObject)
- Provisioning Roles (ProvisioningRoles)
- Related Object Profile (RelatedObjectProfile)
- Report (ReportingTab)
- Reporting Snapshots (ReportingSnapshotsTab)
- Reverse Approval (ApproveReverseSyncNewAccount)
- View Job (JobView)

- b. Edit the new tab by clicking the pencil next to the name
- c. Rename the Name to: ImplementSensitiveProfile
- d. Rename the Tag to: ImplementSensitiveProfile
- e. Next to Screen, click Browse
- f. At the bottom of the screen, click New
- g. Next to Create a Copy of, click Search. (you can also just create a new standard screen)
- h. Select Default User Profile
- i. Rename the Name to: Implement Profile
- j. Rename the Tag to: ImplementProfile
- k. Remove all the fields you do not want to display on the Additional Information screen within the CA Identity Portal approval screen. For this example, remove all the fields except for Full Name, User ID, and Email.
- l. Add a row and click the pencil next to the (Space) field to edit

- m. For Attribute Name, select (Screen Logical Attribute) and name it |Instructions|
- n. For Style, select Text Area
- o. For Name, type Instructions
- p. Scroll down to Initialization JavaScript, in this field create your message to the implementer. In this case, it is instructions on how to manually implement the request. For example:

```
function init(FieldContext) {  
  
    var message = "Please log into the target server and create the user in the  
    /etc/passwd file and add them to /etc/group xyz";  
  
    FieldContext.setValue(message);  
  
}
```

- q. Click Apply in the attribute box, then click OK at the bottom of the screen.
- r. On the next screen, make sure that Implement Profile is selected and click Select
- s. On the next screen, click OK
- t. On the next screen, click Submit

Create Request Admin Task

1. Navigate to: Roles and Tasks > Admin Tasks > Create Admin Task > Create a copy ...
2. Create Copy of: [SIGMA] Assign Role Manager Approval
Note: If you are not building this task in the Solutions Pro environment, you'll need to create a copy of your generic assign provisioning role task
3. In the Profile Tab:
 - a. Rename the task to: [SIGMA] Assign Really Sensitive Role
 - b. Rename the Tag to: SIGMAAssignReallySensitiveRole
4. In the Events Tab: click the pencil to edit next to Provisioning Roles – AssignProvisioningRoleEvent

Profile

Search

Tags

Fields

Events

Workflow processes associated with events in this task.

Tab Tag	Event Name	Workflow Process
Profile	ModifyUserEvent	
Profile	ResetPasswordEvent	
Profile	ForgottenPasswordEvent	
Profile	ViewUserEvent	
AccessRoles	AssignAccessRoleEvent	
AccessRoles	RevokeAccessRoleEvent	
AccessRoles	AddGrantorOnAccessRoleEvent	
AccessRoles	RemoveGrantorOnAccessRoleEvent	
AdminRoles	AssignAdminRoleEvent	
AdminRoles	RevokeAdminRoleEvent	
AdminRoles	AddGrantorOnAdminRoleEvent	
AdminRoles	RemoveGrantorOnAdminRoleEvent	
ProvisioningRoles	AssignProvisioningRoleEvent	SingleStepApproval
ProvisioningRoles	RevokeProvisioningRoleEvent	
ProvisioningRoles	AccumulatedProvisioningRolesEvent	
ProvisioningRolesIndirect	AssignProvisioningRoleEvent	
ProvisioningRolesIndirect	RevokeProvisioningRoleEvent	
ProvisioningRolesIndirect	AccumulatedProvisioningRolesEvent	
Groups	AddToGroupEvent	
Groups	RemoveFromGroupEvent	
Groups	AddGroupAdminEvent	
Groups	RemoveGroupAdminEvent	
Delegation	ModifyDelegationEvent	
Delegation	DeleteDelegationEvent	

5. On the next screen, select the workflow we created in Workpoint (Step 5 of Create Custom Workflow). In our example, this is: FourStageApprovalProcess.

Workflow Mapping for AssignProvisioningRoleEvent	
<input checked="" type="radio"/> Non-Policy Based <input type="radio"/> Policy Based	SingleStepApproval Consultation Process CreateGroupApproveProcess CreateOrganizationApproveProcess CreateUserApproveProcess DeleteGroupApproveProcess DeleteOrganizationApproveProcess DeleteUserApproveProcess EscalationApproval FourStageApprovalProcess ImplementationWith1Approval ModifyAccessRoleMembershipApproveProcess ModifyAdminRoleMembershipApproveProcess ModifyGroupMembershipApproveProcess ModifyIdentityPolicySetApproveProcess ModifyObjectApproveProcess ModifyOrganizationApproveProcess ModifyUserApproveProcess NewOne SelfRegistrationApproveProcess SingleStepApproval Task Admin Roles
This process template	
Default Approver	
Request Description	
Approval Task	
Participant Resolver	
Resolver Description	

6. You should see the four stages of our custom workflow displayed:

7. For IT Manual Implementation:

- a. Approval Task: Implement Request Access

Note: This is the admin task defined in the section Create Implement “Approval” Admin Task.

- b. Participant Resolver: Group Members

- c. Select the Help Desk Group created in the section Create Help Desk Group

8. For Manager Approval:

- a. Approval Task: Approve Request Access

- b. Participant Resolver: Dynamic Resolver

- i. Approvers: Users

- ii. User or Object: Primary object of this task

- iii. Attribute: Manager ID

9. For HR Approval:

- a. Approval Task: Approve Request Access

- b. Participant Resolver: List of Users

- i. Select jonri01 (Rita Jones) or another user of your choice

10. For Risk Manager Approval:

- a. Approval Task: Approve Request Access

- b. Participant Resolver: List of Users

- i. Select menbr01 (Brian Mendoza) or another user of your choice

11. Click OK

12. Click Submit

Add Admin Task to Admin Group

1. Navigate to Roles and Tasks > Admin Roles > Modify Admin Role
2. Select [SIGMA] Self Manager
3. In the Tasks Tab, add the new admin task: [SIGMA] Assign Role Manager Approval
4. Click Submit

CA Identity Portal Configuration

Log into the CA Identity Portal Admin UI to perform the following configurations.

Restart IDM Connector

1. Navigate to Backend management > Connectors
2. Restart the IDM Connector

Create IDP Task

1. Navigate to Backend management > Tasks
2. Create New Task
 - a. Connector = CAIDM
 - b. Name = [SIGMA] Assign Really Sensitive Role
 - c. Tag = auto populates
 - d. additionOperation = directChange
 - e. removalOperation = directChange
 - f. IsBulkTask = False
3. Click Save

Create IDP Form

1. Navigate to Backend management > Forms
2. Create New Form
 - a. Form Name = ReallySensitiveAccess
 - b. Form Tag = auto populates
 - c. Task = SIGMAAssignReallySensitiveRole
 - d. Click Add prop
 - i. Approval Notice
 - ii. Property type = Message
 - iii. Type out a message in the body of the property
For example:

Requesting this access requires approvals from:

- Your Manager
- The Corporate Risk Manager
- Human Resources

This access will then be granted by the IT Help Desk.

3. Click Save

Create IDP Target Permission

1. Navigate to Backend management > Target Permissions
2. Click New
3. Connector = CAIDM
4. Name = [SIGMA] Really Sensitive Application
5. Tag = auto populated
6. Type (can't be changed) = Role
7. Mod Type = ADD
8. Click Add Rule
 - a. Name = default
 - b. Priority = 1
 - c. Mode = AccessRights
 - d. Expression = true
 - e. Forms:
 - i. Add = check the box and select ReallySensitiveAccess
 - ii. Remove = check the box and select AssignRole

Note: this is a blank form used to add / remove generic access. If using your own, do not reuse the ReallySensitiveAccess form as this will trigger the three step approval.

Alternative: You can create a single step approval node for implementation, this will enable you to notify the Help Desk to automatically remove the access.
9. Click Save

Edit the Entitlement Tree

1. Navigate to Environment > Entitlement Tree
2. Create a new Group
3. Name the Group; in my environment, I called this Customer Assets (as this was demoed to the *customer*)
4. Under this Group create a new application; in my environment, I called this *Customer* Application. You can name this Really Sensitive Application to continue the demo flow here
5. In the middle pane, create a new permission; I called this Basic Access
6. Click on the permission and select the Target Permission in the right pane:
[SIGMA] Really Sensitive Application
7. Click Save

End Result

Here is the demo flow. This is assuming the Solution Pro demo was used.

1. Log into the CA Identity Portal as garan01 (Anne Garrett)
2. Click Access > Request for Self
3. Search for Customer Assets, click on Really Sensitive Application, add to Cart

The screenshot shows the CA Identity Portal interface. The user is logged in as Anne Garrett. The 'Access' tab is selected, and the 'Really Sensitive Application' is added to the cart. The cart shows 'Total: 1 Items' and a 'Check Out' button.

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4. Click Check Out
5. Go to My Requests and click on the current request. Note the approver.

The screenshot shows the CA Identity Portal interface. The user is logged in as Anne Garrett. The 'My Requests' tab is selected, and the 'Request Details' for 'Really Sensitive Application' are displayed. The 'Timeline' shows the request was submitted by Anne Garrett and is currently pending approval from Tony Belli, Manager.

Requester	Target	Submit Date	Status	ID
Anne Garrett	Anne Garrett	5/26/2016	In Progress	565
Anne Garrett	Anne Garrett	5/26/2016	Completed	564
Anne Garrett	Anne Garrett	5/24/2016	Completed	563
Anne Garrett	Anne Garrett	5/24/2016	Completed	559
Anne Garrett	Anne Garrett	5/24/2016	Completed	558
Anne Garrett	Anne Garrett	5/24/2016	Completed	557
Anne Garrett	Anne Garrett	5/24/2016	Completed	556
Anne Garrett	Anne Garrett	5/23/2016	Completed	551
Anne	Anne	5/23/2016	Completed	550

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6. Logout and Login as belto01 (Tony Belli)
7. Click on Tasks
8. Type a comment and click Approve.

CA Identity Portal

Home My Profile **Tasks** Access My Requests Modify My Profile My Department User Onboarding Apps Drafts English

Approvals Implementa... Campaigns

Requested For	Requested By	Submit Date	ID
✓ Anne Garrett	Anne Garrett	5/26/2016	565

Approval Details

For: **Anne Garrett**

Requester: **Anne Garrett (garan01)**

Assigned Date: **5/26/2016** Request Id: **565**

Process step: **Manager Approval**

Request information Additional Information

Customer Assets

Really Sensitive Application

Basic Access

Timeline

Anne Garrett about a minute ago

Submitted

You

Waiting for you

Anne needs this access for testing we are doing!

More Reject Approve

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9. Logout and Login as garan01 (Anne Garrett)
10. Click on My Requests and click on Basic Access. Note the next approver.

CA Identity Portal

Home My Profile Tasks Access **My Requests** Modify My Profile Apps Drafts English

Search requests for users, dates and IDs

Requeste d by	Target	Submit Date	Status	ID
Anne Garrett	Anne Garrett	5/26/2016	In Progress	565
Anne Garrett	Anne Garrett	5/26/2016	Completed	564
Anne Garrett	Anne Garrett	5/24/2016	Completed	563
Anne Garrett	Anne Garrett	5/24/2016	Completed	559
Anne Garrett	Anne Garrett	5/24/2016	Completed	558
Anne Garrett	Anne Garrett	5/24/2016	Completed	557
Anne Garrett	Anne Garrett	5/24/2016	Completed	556
Anne Garrett	Anne Garrett	5/23/2016	Completed	551
Anne	Anne	5/23/2016	Completed	550

Request Details

Access Right (1)

Customer Assets

Really Sensitive Application

Basic Access In Progress 5/26/2016

Requesting this access requires approvals from:

- Your Manager
- The Corporate Risk Manager
- Human Resources

This access will then be granted by the IT Help Desk.

Timeline

Anne Garrett 3 minutes ago

Submitted

Tony Belli, Manager Approval less than a minute ago

Approve

"Anne needs this access for testing we are doing."

Brian Mendoza, Risk Manager Approval

Pending

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11. Logout and Login as menbr01 (Brain Mendoza)

12. Click Tasks, leave a comment, and approve.

CA Identity Portal

Approvals

Requested For	Requested By	Submit Date	ID
Anne Garrett	Anne Garrett	5/26/2016	565

Approval Details

For: Anne Garrett

Requester: Anne Garrett (garan01)

Assigned Date: 5/26/2016 Request Id: 565

Process step: Risk Manager Appro...

Request information Additional Information

Customer Assets

Really Sensitive Application

Basic Access

Timeline

Anne Garrett 4 minutes ago

Submitted

Tony Belli, Manager Approval 2 minutes ago

Approve

"Anne needs this access for testing we are doing."

You

Waiting for you

This is an acceptable risk. I approve.

More Reject Approve

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13. Logout and Login as garan01 (Anne Garrett)

14. Click on My Requests and click on Basic Access. Note the next approver.

CA Identity Portal

My Requests

Requested by	Target	Submit Date	Status	ID
Anne Garrett	Anne Garrett	5/26/2016	In Progress	565
Anne Garrett	Anne Garrett	5/26/2016	Completed	564
Anne Garrett	Anne Garrett	5/24/2016	Completed	563
Anne Garrett	Anne Garrett	5/24/2016	Completed	559
Anne Garrett	Anne Garrett	5/24/2016	Completed	558
Anne Garrett	Anne Garrett	5/24/2016	Completed	557
Anne Garrett	Anne Garrett	5/24/2016	Completed	556
Anne Garrett	Anne Garrett	5/23/2016	Completed	551
Anne	Anne	5/23/2016	Completed	550

Request Details

Access Right (1)

Customer Assets

Really Sensitive Application

Basic Access In Progress 5/26/2016

Requesting this access requires approvals from:

- Your Manager
- The Corporate Risk Manager
- Human Resources

This access will then be granted by the IT Help Desk.

Timeline

Anne Garrett 6 minutes ago

Submitted

Tony Belli, Manager Approval 4 minutes ago

Approve

"Anne needs this access for testing we are doing."

Brian Mendoza, Risk Manager Approval less than a minute ago

Approve

"This is an acceptable risk. I approve."

Rita Jones, HR Approval

Pending

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15. Logout and Login as jonri01 (Rita Jones)

16. Click Tasks, leave a comment, and approve.

CA Identity Portal

Home My Profile Tasks Access My Requests Modify My Profile My Department User Onboarding

Apps Drafts English

Approvals Implementa... Campaigns

Requested For Requested By Submit Date ID

Requested For	Requested By	Submit Date	ID
Anne Garrett	Anne Garrett	5/26/2016	565

Approval Details

For: Anne Garrett

Requester: Anne Garrett (garan01)

Assigned Date: 5/26/2016 Request Id: 565

Process step: HR Approval

Request information Additional Information

Customer Assets

Really Sensitive Application

Basic Access

Timeline

Approve

"Anne needs this access for testing we are doing."

Brian Mendoza, Risk Manager Approval 2 minutes ago

Approve

"This is an acceptable risk. I approve."

You

Waiting for you

Anne is an employee in good standing. I approve this request.

More Reject Approve

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17. Logout and Login as garan01 (Anne Garrett)

18. Click on My Requests and click on Basic Access. Note the next approver.

19. Logout and Login as garan01 (Anne Garrett)

20. Click on My Requests and click on Basic Access. Note the next approver is a group. Hover over the Group and note the list of approvers.

CA Identity Portal

Home My Profile Tasks Access My Requests Modify My Profile

Apps Drafts English

Search requests for users, dates and IDs

Requester	Target	Submit Date	Status	ID
Anne Garrett	Anne Garrett	5/26/2016	In Progress	565
Anne Garrett	Anne Garrett	5/26/2016	Completed	564
Anne Garrett	Anne Garrett	5/24/2016	Completed	563
Anne Garrett	Anne Garrett	5/24/2016	Completed	559
Anne Garrett	Anne Garrett	5/24/2016	Completed	558
Anne Garrett	Anne Garrett	5/24/2016	Completed	557
Anne Garrett	Anne Garrett	5/24/2016	Completed	556
Anne Garrett	Anne Garrett	5/23/2016	Completed	551
Anne	Anne	5/23/2016	Completed	550

Request Details

Status Last Update

Access Right (1)

Customer Assets

Really Sensitive Application

Basic Access In Progress 5/26/2016

Requesting this access requires approvals from:

- Your Manager
- The Corporate Risk Manager
- Human Resources

This access will then be granted by the IT Help Desk.

3 Users

- Rafael Ortiz
- Anita Hirsch
- Tania Turner

Timeline

Approve

"Anne needs this access for testing we are doing."

Brian Mendoza, Risk Manager Approval 3 minutes ago

Approve

"This is an acceptable risk. I approve."

Rita Jones, HR Approval less than a minute ago

Approve

"Anne is an employee in good standing. I approve this request."

Group, IT Desk Implementation

Pending

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21. Logout and Login as hiran01 (Anita Hirsch) – one of the IT Help Desk resources.

22. Click on Tasks. Note that the task is in the Implementation Tab. Click on Additional Information to see the instructions and information needed to complete the manual provisioning. Leave a comment and implement.

CA Identity Portal

Hello, Anita Hirsch Logout

Tasks

Home My Profile Tasks Access My Requests Modify My Profile Apps Drafts English

Approvals Implementa...

Requested For	Requested By	Submit Date	ID
Anne Garrett	Anne Garrett	5/26/2016	565

Approval Details

For: Anne Garrett

Requester: Anne Garrett (garan01)

Assigned Date: 5/26/2016 Request Id: 565

Process step: IT Desk Implementa..

Request information Additional Information

Email: garan01@forwardinc.ca

Instructions: Please create the user in the application. Assign basic level access. Inform user of password.

Full Name: Anne Garrett

User ID: garan01

Timeline

Anne Garrett 12 minutes ago Submitted

Tony Belli, Manager Approval 9 minutes ago Approve

"Anne needs this access for testing we are doing."

Brian Mendoza, Risk Manager Approval 6 minutes ago Approve

I created your account, Anne. I'll email your password to you. Please change once you log in.

More Implement

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23. Logout and Login as garan01 (Anne Garrett)

24. Click on My Requests and click on Basic Access. Note that the workflow is completed.

CA Identity Portal

Hello, Anne Garrett Logout

Tasks

Home My Profile Tasks Access My Requests Modify My Profile Apps Drafts English

Search requests for users, dates and IDs

Requester	Target	Submit Date	Status	ID
Anne Garrett	Anne Garrett	5/26/2016	Completed	565
Anne Garrett	Anne Garrett	5/26/2016	Completed	564
Anne Garrett	Anne Garrett	5/24/2016	Completed	563
Anne Garrett	Anne Garrett	5/24/2016	Completed	559
Anne Garrett	Anne Garrett	5/24/2016	Completed	558
Anne Garrett	Anne Garrett	5/24/2016	Completed	557
Anne Garrett	Anne Garrett	5/24/2016	Completed	556
Anne Garrett	Anne Garrett	5/23/2016	Completed	551
Anne	Anne	5/23/2016	Completed	550

Request Details

Access Right (1)

Customer Assets

Really Sensitive Application

Basic Access Completed 5/26/2016

Requesting this access requires approvals from:

- Your Manager
- The Corporate Risk Manager
- Human Resources

This access will then be granted by the IT Help Desk.

Timeline

Brian Mendoza, Risk Manager Approval 10 minutes ago Approve

"This is an acceptable risk. I approve."

Rita Jones, HR Approval 8 minutes ago Approve

"Anne is an employee in good standing. I approve this request."

Anita Hirsch, IT Desk Implementation less than a minute ago Implement

"I created your account, Anne. I'll email your password to you. Please change..."

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25. Also note that the comments left by Anita exceeded the bubble size. Click on the comment bubble and show the pop-up with the complete comment.

The screenshot shows the CA Identity Portal interface. The top navigation bar includes the CA Technologies logo, a user profile for Anne Garrett, and links to Home, My Profile, Tasks, Access, My Requests, and Modify My Profile. The main content area displays a 'Request Details' view for a request created by Anne Garrett. A comment bubble is visible, and a timeline on the right shows the request's history, including a comment from Anita that exceeds the bubble size. A pop-up window shows the complete comment text: 'I created your account, Anne. I'll email your password to you. Please change once you log in.' The bottom of the page shows the copyright notice 'Copyright © 2015 CA. All rights reserved' and the version number '1.6.1.682'.

26. Click Ok and click Access > Request for Self. Do a search for Sensitive and click on Really Sensitive Application. Note that the Basic Access has been provisioned.

The screenshot shows the CA Identity Portal interface. The top navigation bar is the same as the previous screenshot. The main content area displays the 'Really Sensitive Application' view. A search bar is visible, and the results show 'Really Sensitive Application' under the 'Sensitive' category. The 'Basic Access' has been provisioned, as indicated by a checkmark. A 'Cart' section on the right shows 'Cart is empty' and 'Total: 0 Items'. The bottom of the page shows the copyright notice 'Copyright © 2015 CA. All rights reserved' and the version number '1.6.1.682'.

27. End scene.