Users guide

This guide describes non-administrative, ‘day-to-day’ usage of ForgeRock Identity Governance, including overviews and instructions for end-user tasks. It is not intended to document any administrative functionality, including creation and management of certification campaigns, Segregation-of-Duty (SOD) policies, or requests and approval tasks.

This guide is written for ForgeRock Identity Governance users to provide guidance on how to perform actions in certification campaigns, approval tasks, request creation, and SOD violation tasks.

Log in

Learn about the Identity Governance login.

My review tasks

Learn about the Identity Governance review tasks assigned to certifiers.

User certifications

Learn about the Identity Governance user certifications.

Object certifications

Policies

Learn about the Identity Governance policies.

Learn about the Identity Governance object certifications.

My requests

Learn about the Identity Governance **My Requests** page.

Creating requests

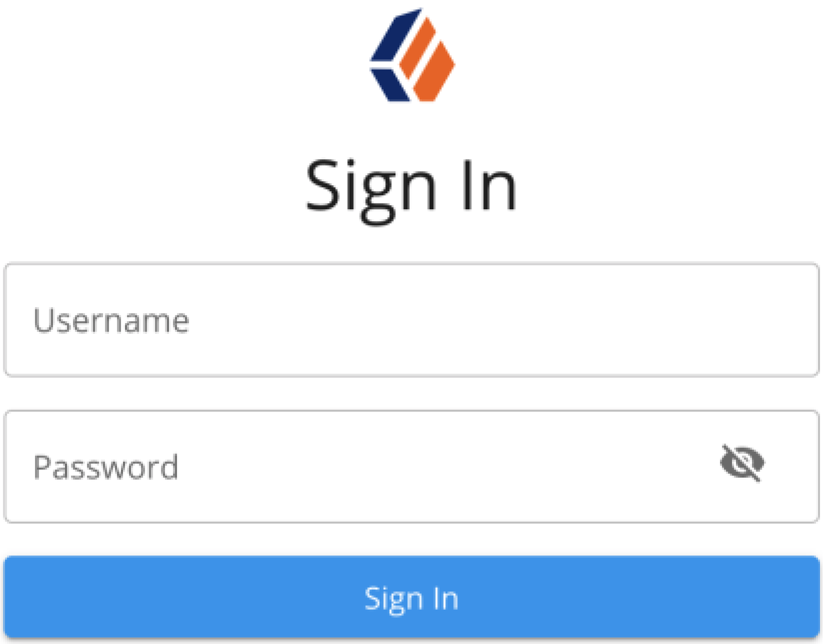
Learn about creating requests.

My approvals

Learn about the Identity Governance **My Approvals** page.

Login

To reach the ForgeRock Identity Governance User Interface, navigate to the /governance context of your IDM self-service environment URL. If reaching the Identity Governance context without an existing session, the user will be presented with the Identity Governance login page pictured below.



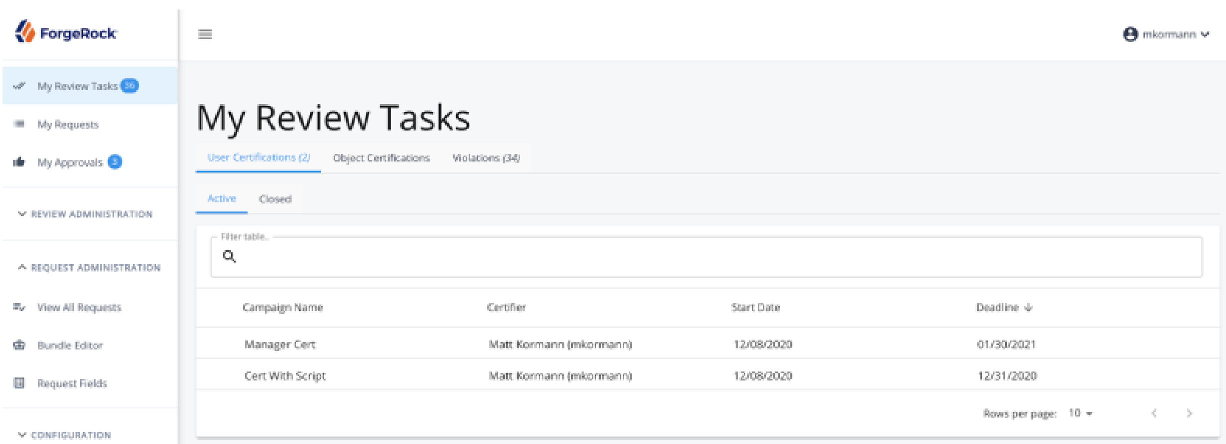
NOTE

If Single Sign-on is enabled through ForgeRock Access Manager, the user will be directed to the AM login flow instead of being presented with the login prompt seen here. Once authenticated, the user will be returned to the IDM self-service interface and must redirect to the governance context manually.

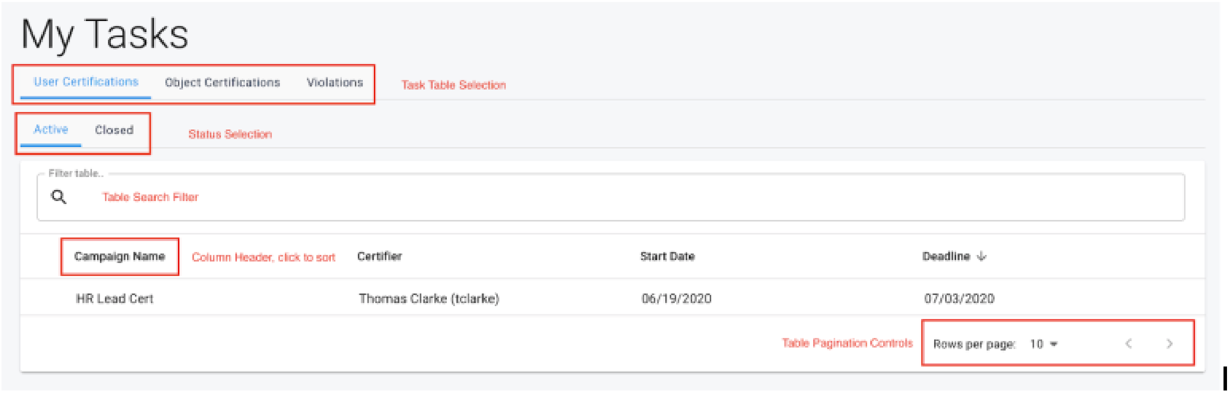
My review tasks

The **My Review Tasks** screen displays all the certification tasks that belong to the logged in user in one of three distinct tables: User Certifications, Object Certifications, and Violations.

To navigate to each of these tables, simply select the corresponding tab from the list of options directly below the “My Review Tasks” title of the page.



Task table controls



Task table selection

Click any tab from the task table selection list to navigate to the tasks that belong to that category.

Status selction

To switch between the tasks for a given category that are either in progress or completed, toggle between the “Active” and “Closed” tabs found in the status selection row.

Table search filter

The table search filter allows the user to narrow the results shown in the tasks table by searching against some of the columns that are displayed in the tasks table. All columns are searchable against, so refer to the sections below for information on which are and are not.

Column header

The column headers in the tasks table allow the user to sort the task rows by the column selected. Clicking a selected column a second time will reverse the current direction of the sort. Note that not all columns are sortable, please refer to the sections below for information on which are and are not.

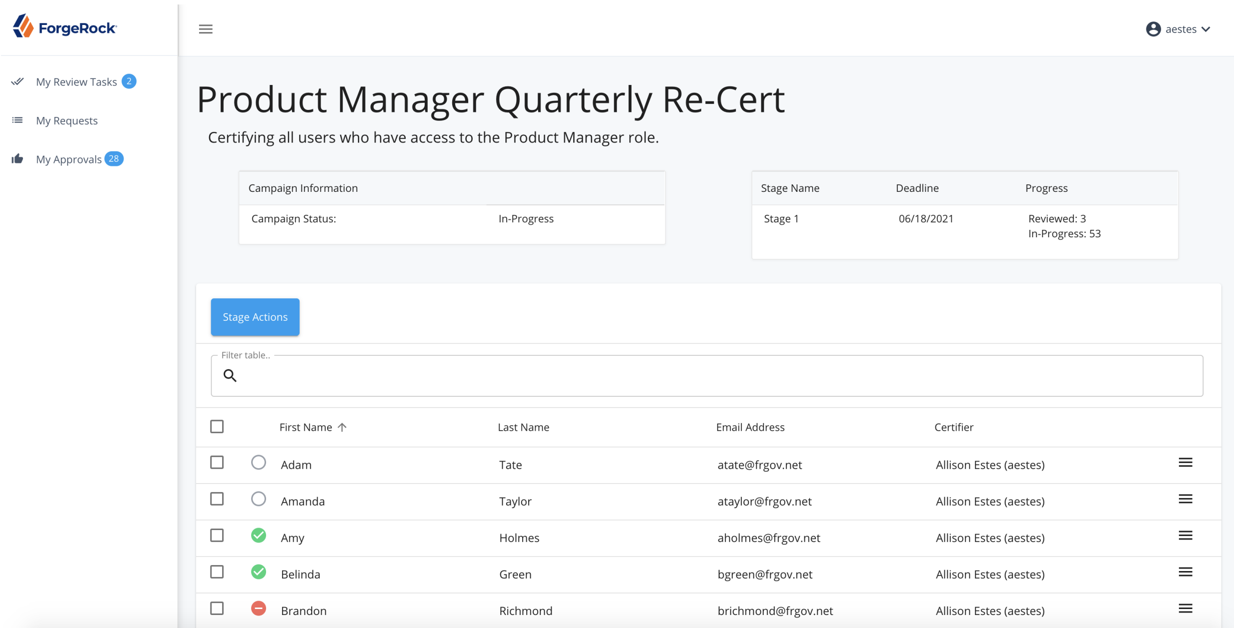
Table pagination controls

Control the number of results displayed in the current tasks table, as well as the page of results that is being viewed. To change the current number of rows displayed, click the rows per page arrow icon and choose an amount from the selection list. The options provided are 10, 25, and 50.

To advance back and forth between paged results, simply click on the forward or backward icons next to the rows per page option and the desired page of results will load.

User certifications

User certifications table



- Display Columns
  - Campaign Name
    - Description: Name of the active campaign
    - Searchable: Yes
    - Sortable: Yes
  - Certifier
    - Description: Certifier that is assigned to the campaign, either the logged in user or the role that they belong to
    - Searchable: No
    - Sortable: No
  - Campaign Start Date
    - Description: Date the campaign was initially kicked off
    - Searchable: No

        - Sortable: Yes
    - Deadline
        - Description: Deadline of the tasks assigned to the user in the given campaign
        - Searchable: No
        - Sortable: Yes

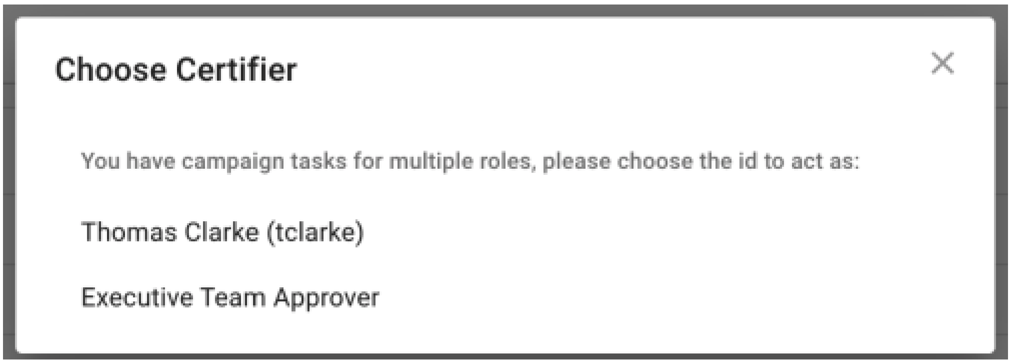
Reviewing and certifying a user certification

1. Log into ForgeRock Identity Governance and navigate to the User Certifications table.
2. Locate or search for the campaign in the certifications table that you wish to review and/or certify.
3. Click on the campaign to navigate to the certification list for the selected campaign.

    Note: In certain scenarios, it is possible for a user to have access to certify a campaign as two different certifier types. For example, if a user is a part of two different authorization roles that both are assigned as certifiers for one or more events in a campaign, then they can view that campaign as either of the two roles they are a part of. Since each individual role that a user belongs to can give the certifier visibility into different portions of a certification, a user is only able to view each campaign as a single acting certifier at a time.

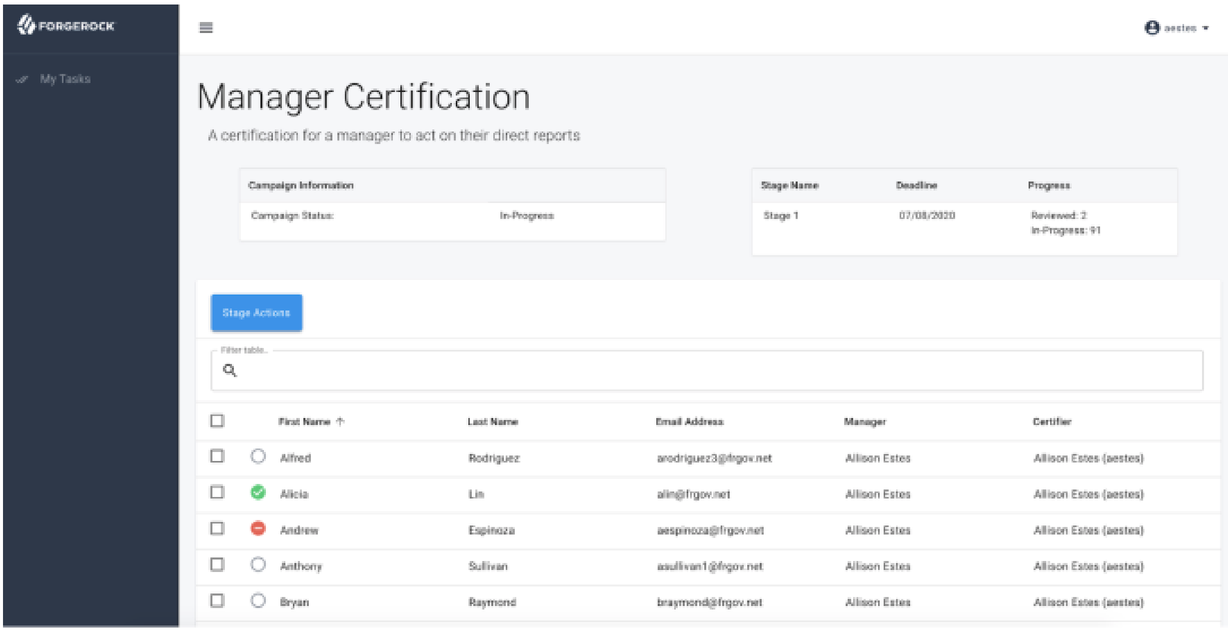
Campaign Name	Certifier
Executive Team Certification	Executive Team Approver
HR Lead Cert	Multiple Options
IT Administrative Access	Thomas Clarke (tclarke)

    When this occurs, the user will see the term “Multiple Options” displayed underneath the certifier column. When the user chooses to click on a campaign with multiple certifier options, a page will be displayed informing them of the situation and instructing them to choose the certifier to act as. Once chosen the user will be redirected to the certification list.



User certification list

The certification list screen is the landing page for the certifier for a single campaign. The page is broken up into several sections, all of which are described in detail below.

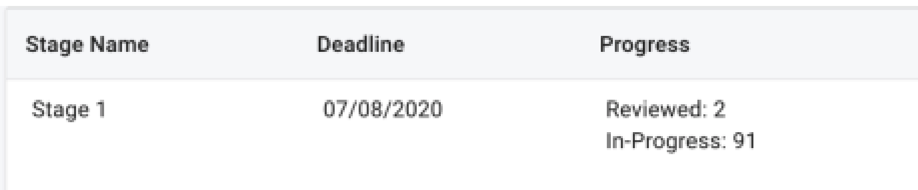


Campaign information

The campaign information box will display some basic information about the campaign being viewed, most notably the Campaign Status. For an active certification, the campaign status field is marked `in-progress`. For a closed certification, it shows the result of the certification, either `signed-off`, `cancelled`, or `expired`.

Stage information

The stage information box will show a breakdown of the stages within the certification campaign that have tasks that are assigned to you.



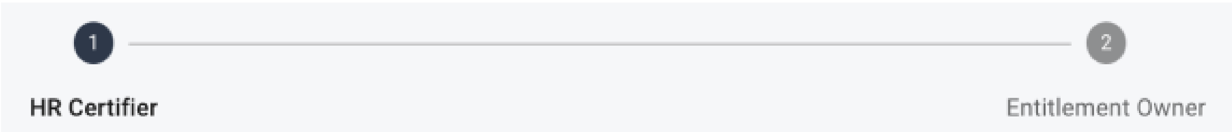
Stage Name	Deadline	Progress
Stage 1	07/08/2020	Reviewed: 2 In-Progress: 91

Each stage row will show the following information:

- Stage Name - The name given to the certification stage
- Deadline - The date that the stage's tasks are due
- Progress - The breakdown of the statuses of the stage events that are assigned to you.
    - In-Progress - event is active and not complete
    - Reviewed - event is active, completed, but not signed-off
    - Signed-off - event has been completed and signed-off.
    - Pending - event will be assigned to you when a previous stage is completed.

Stage selector

Shows a chronological visual of the certification stages. By selecting a stage node, the page will be updated to reflect data for the selected stage.

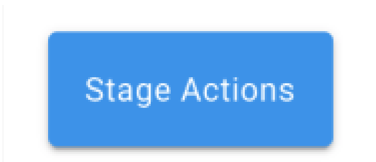


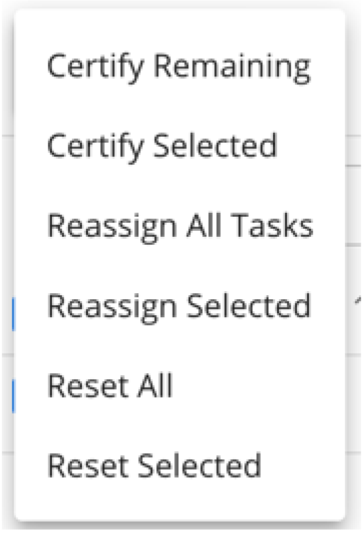
When a different stage is selected, the user will be able to see information about the previous stage results or future stage events that match with the current list of events available to the certifier in the current stage. The user will not be able to see events in a previous or future stage that target users that they are not responsible for certifying.

Stage actions

Certifiers have access to a handful of stage actions at the certification list level. These are actions that affect all or a selected subset of the targets within the certification. Certain actions are available or unavailable depending on the status of the certification campaign. For example, sign off is only be available if all or some of the events are reviewed or completed.

The full list of actions are:





Item	Description
Certify Selected	Certify all entitlements within the selected events in the stage that have not yet been acted on. This action does NOT overrule any revoke or abstain decisions made previously. This action is only available if the governance administration team has enabled bulk certification.
Certify Remaining	Certify all remaining entitlements within the stage that have not yet been acted on. **Certify remaining** only takes action on incomplete entitlements and does NOT overrule any revoke or abstain decisions made previously. This action is only available if the governance administration team has enabled bulk certification.
Reset Selected	Reset all entitlement decisions within the stage for the events selected via checkbox, clearing all results.
Reset All	Reset all entitlement decisions within the stage that have not been signed-off.
Claim Selected	Claim the events selected via checkbox. Claiming is available in role-owned stages only, and is required for any single user within a role to take actions on an event. Claiming is only available to a single user within a role. Once claimed, the user must complete the task.
Claim All	Claim all available events in the stage. Available in role-owned stages only.

Item	Description
Sign-off	Finalize all actions taken and remove them from your tasks. Sign off is available as an option when all certifications in a stage are reviewed (single user certifier) or all claimed events have been reviewed (role certifiers) the sign-off action is available. Choosing sign off prompts the user to confirm the action. Once confirmed, the sign-off takes effect.
Reassign selected	Reassign the items you have selected to another user or role. This action is only available if the governance administration team has enabled **Allow Certification Event Reassignment** in the system settings.
Reassign all tasks	Reassign all the items assigned to you on the access review to another user or role. This action is only available if the governance administration team has enabled **Allow Certification Event Reassignment** in the system settings.

Search filter

Users can use the search filter above the certification target list to filter the visible list of users included in the campaign. Any of the columns that are displayed within the table are eligible to be searched against except for the certifier column at the end of the row.

TIP

TIP

You can search on multiple columns at once for advanced filtering.

▼ [See it in action]

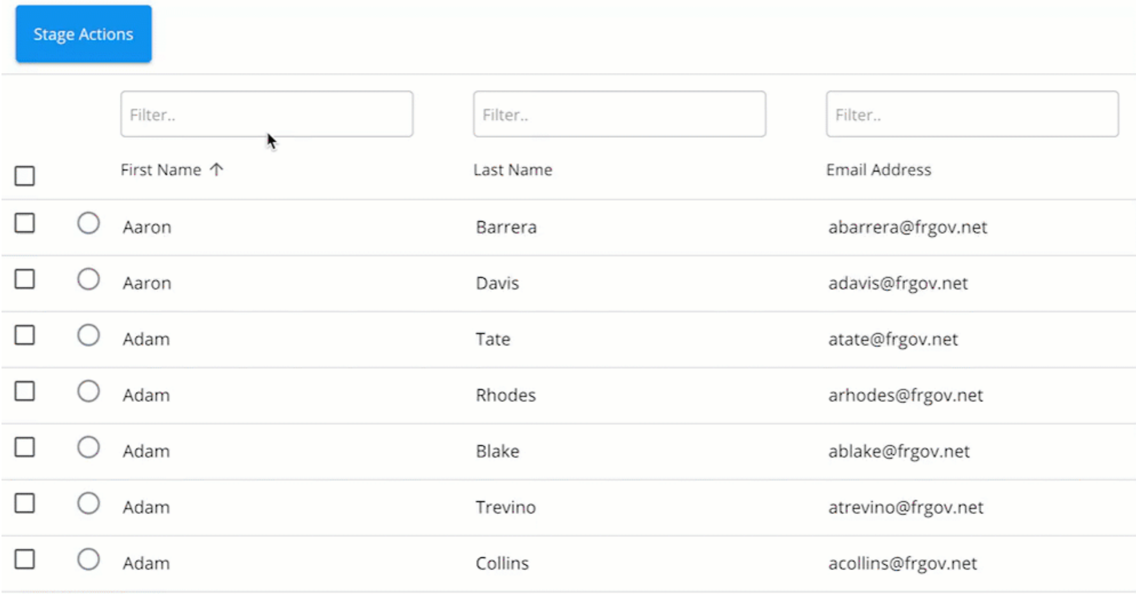
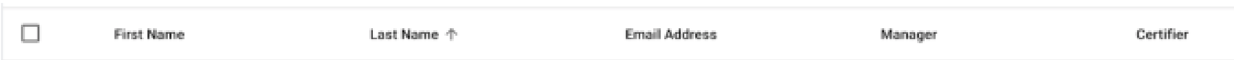


Table headers

The table headers allow the user to sort the table contents based on the selected column.



Clicking a column header resorts the table based on that criteria, and clicking it a second time reverses the order of sorting. All columns contained in a certification list table are eligible to be used for sorting except for the certifier column at the end of the row

Table rows

Each individual row within the certification list table contains the data for a single user or object event within a certification. At the beginning of each row is a checkbox used for selecting multiple rows at a time to take bulk stage actions on. The rest of the row contains the data for that user event that corresponds to the headers found at the top of the table.

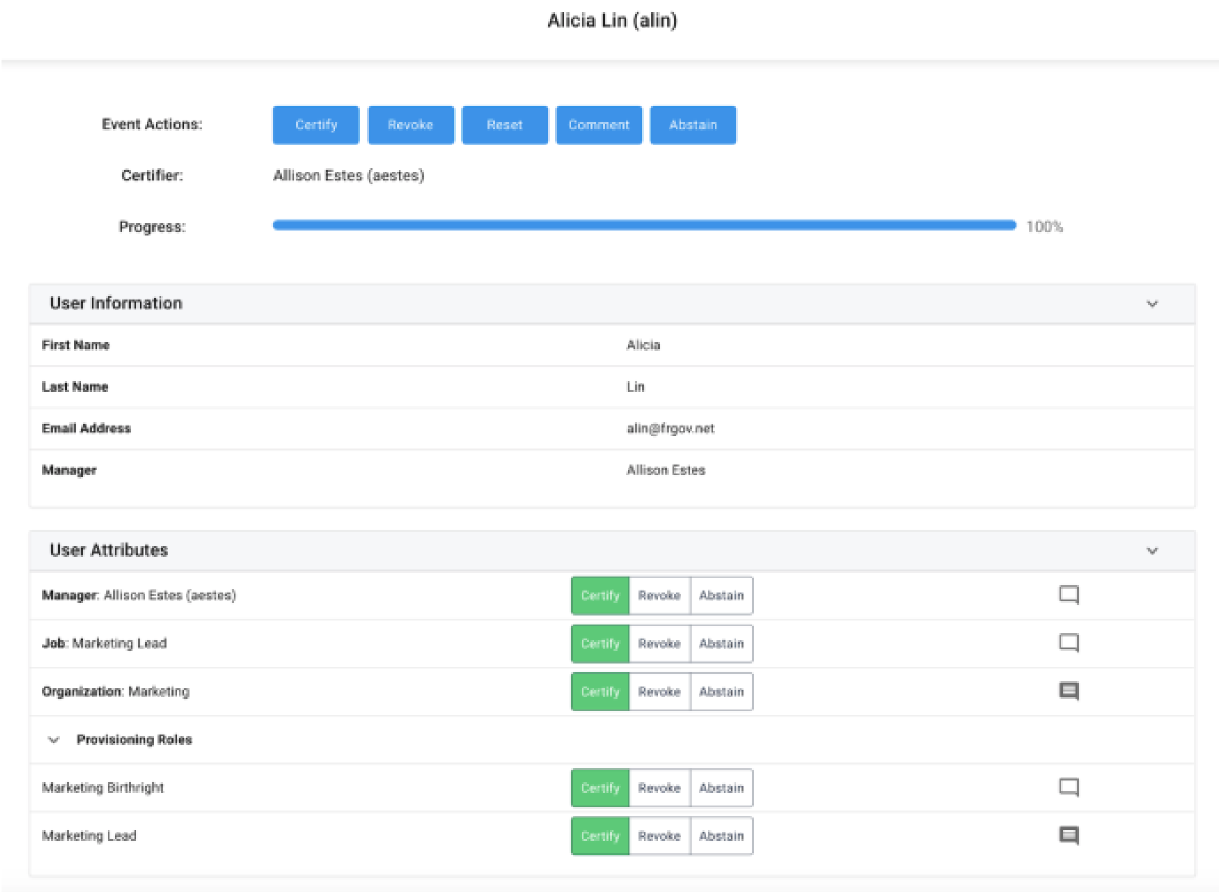
In order to view the event details of a given event, simply click on the row of the desired event and the details page will dropdown from the top of the page. This is how the user can navigate to the screen to make their certification decisions.

Pagination controls

Pagination controls allow the end user to cycle between different pages of results for the given campaign stage. Users also have the ability to choose a rows per page option, to display more or less results per page. The options available are 10, 25, and 50 per page. See section Table Pagination Controls for images and further explanation on pagination.

User event details

The event details page for a certification is a complete view of an individual certification event that targets a single user or object. This is where the certifier makes their decisions on certifying or revoking entitlements for the target of the event.



Target display name

The top of the event details page will have the target's display name displayed. For user certifications, this will be the name formatted to fit the Display Format defined by the administrator in the system settings.

Event information

The event information that correspond to the active event. Based on the status and definition of the certification campaign, several of the following rows may or may not be visible:

- Stage Selector - Similar to the stage selector on the user certification list screen, when a target in a given campaign has multiple stages there will be a stage selection component available for the certifier to quickly toggle between stages. This can be useful for a certifier to look back at the decisions previously made by another certifier to help in their choices.

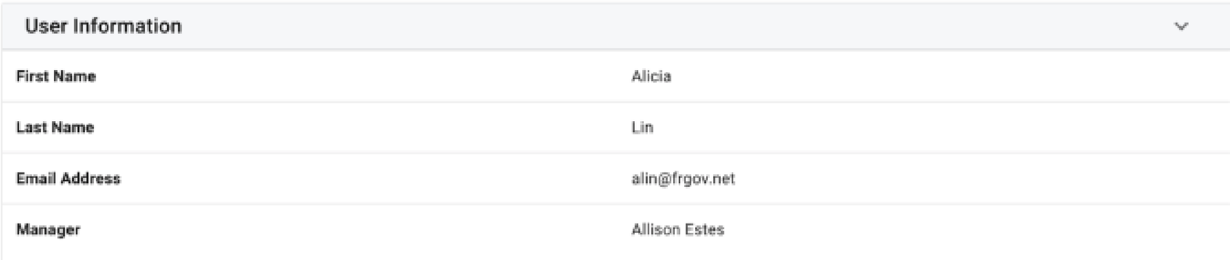
- Event Actions - List of actions that are available to the certifier to take at the event level. The actions are described below:

  - Certify - Take the certify action on all of the available entitlements within the event. This action will NOT take precedence over individual revoke or abstain actions, those will still persist after selecting this.
  - Revoke - Take the revoke action on all of the available entitlements within the event. This action is the highest precedence action, and WILL overrule any previously made abstain or certify decisions
  - Reset - Reset the entire event's decision back to its initial state. The only thing that will persist after a reset are comments made on individual entitlements.
  - Comment - Add a comment on the certification event.
  - Abstain - Take the abstain action on all of the available entitlements within the event. This action WILL take precedence over previous certify actions but will NOT overrule any previously made revoke decisions.
  - Claim - If the event certifier is an authorization role, the user will have the ability to claim the event if it is currently unclaimed by another user. Once claimed, the user can then act on the certification.
- Certifier - The user or role assigned as the certifier of the event
- Claimed By - If the event certifier is a role and the event has been claimed by a user, that user will be displayed here.
- Completion Date - Date of completion, If the event has been reviewed and signed-off.

- Progress Bar: Percentage of certification decisions made on the displayed event.

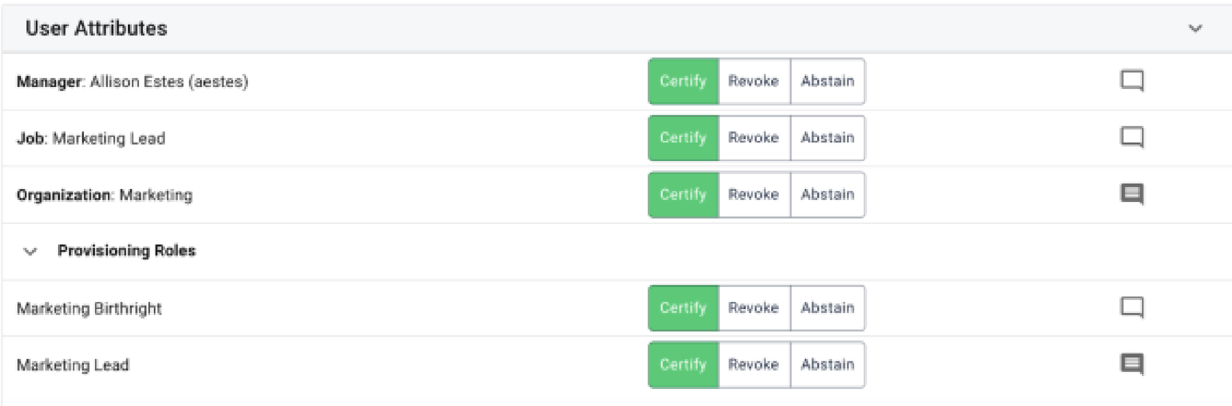
User information

The User Information table will display information about the target user for the given event. It will always include at least the user first name, last name, and email address, and will also include any user attributes that are listed in the glossary with a key of displayInUserInfo set to true. This list of additional attributes is the same list that appears as columns within the user certification list table for a campaign. For example, in the screenshot pictured above, the attribute manager has been added as displayable within certifications. Note that these are not calculated at the time the certification is viewed, but rather at creation, so the glossary key for those attributes must be set before a certification is created to appear here. To expand or collapse this table, click the icon at the top right of the table's header row.



User attributes

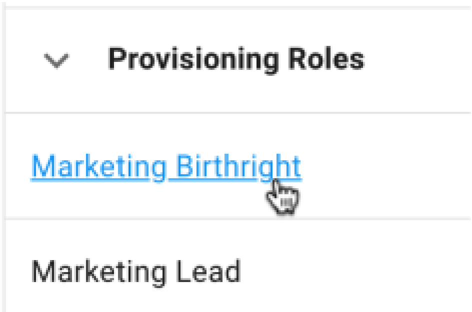
The user attributes table contains all the entitlements that are assigned to the user and are directly tracked and controlled by ForgeRock Identity Manager. Each row within this table is organized into the following format:



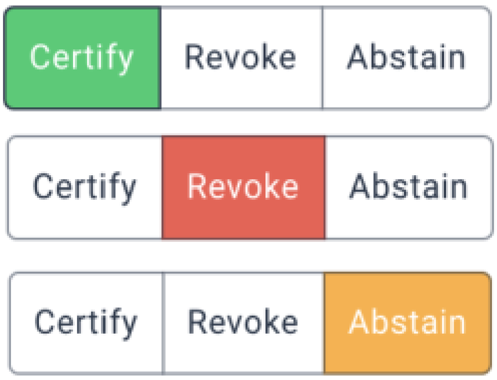
- Attribute Name and/or Value
    - An entry that has a single value assigned to it (e.g. manager) will appear in the format [Attribute Name]: [Attribute Value]
    - An entry that has multiple values will be organized into rows beneath a single collapsible header row. A header row can be identified as just the attribute name in bold, with a collapse icon to its left, and no action buttons or comment icon within its row. Its entries will appear directly below, each in their own row, with just the entitlement name in the attribute column. See the rows for "Provisioning Roles" above.

To collapse an attribute and all its entries, simply click the collapse icon to the left of the name.

- Each attribute name and value is clickable by the user to see any attached metadata that belongs to the given item. Those items that do not have a corresponding glossary entry will display a page informing the administrator that no entry exists. The certifier can use this information to better inform themselves of each entitlement that they are certifying, if need be.

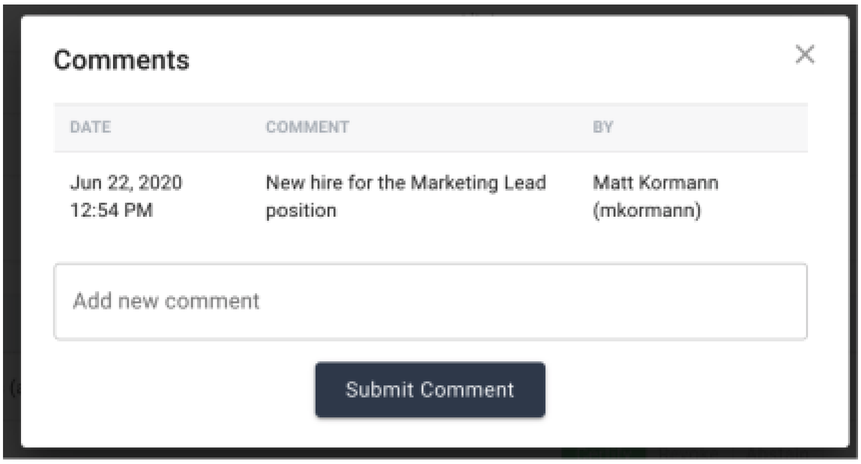


- Certification Action Buttons - these buttons allow the certifier to take action on each certifiable item within the event. Once an action has been selected, that button will be filled in with the color of the action. If no button is selected and filled, then no decision has been made for that item. The buttons included are listed below:
  - Certify
  - Revoke
  - Abstain



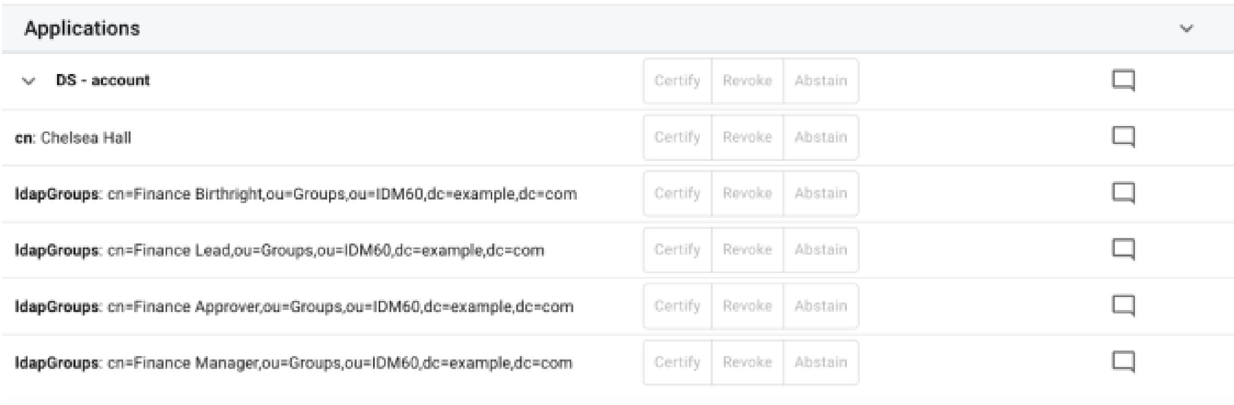
To reset the action taken on the given entitlement, the certifier can click the action a second time to deselect that choice, essentially resetting their action.

- Comment icon
  - The comment icon will either be unfilled if no current comments exist, or have mini comment lines inside of the icon to indicate there are existing comments. The user can click on the comment icon to display the existing comments, and also to add a new comment to that entitlement.

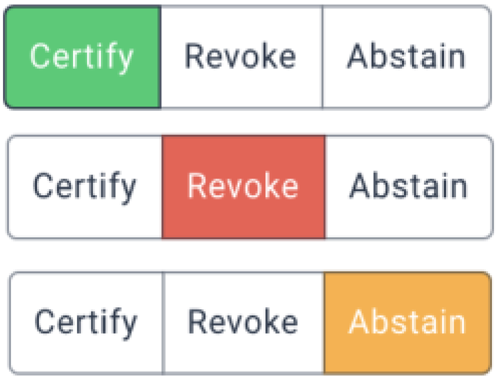


Applications

Contains attributes within connected systems to be certified for the target user. These are not the attributes that are tracked directly by the ForgeRock Identity Manager user object, but rather the direct values as pulled in through the external systems. Each row within this table is organized into the following format:



- Attribute Name and/or Value
  - Each attribute name and value is clickable by the administrator to see any attached metadata that belongs to the given item. Those items that do not have a corresponding glossary entry will display a page informing the administrator that no entry exists.
- Certification Action Buttons - these buttons, disabled for administrators, will show the result of the certification action taken on each item if one has been made. If no button is selected and filled, then no decision has been made for that item. The buttons included are listed below:
  - Certify
  - Revoke
  - Abstain



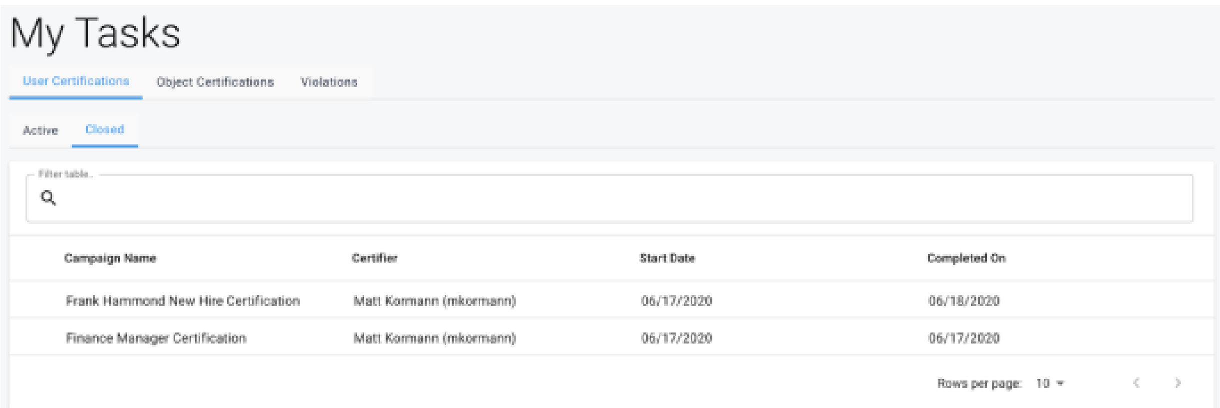
To reset the action taken on the given entitlement, the certifier can click the action a second time to deselect that choice, essentially resetting their action.

- Comment icon
    - The comment icon will either be unfilled if no current comments exist, or have mini comment lines inside of the icon to indicate there are existing comments (pictured below). The administrator can click on the comment icon to display the existing comments, and also to add a new comment to that entitlement.

Closing event details

To close the event details page and return to the certification list simply click the 'X' icon in the top right of the page. Note that there is no submission or save action involved at this stage of the certification process. The actions that you make will persist on the certification event until changed, reset, or eventually signed-off. There is no need to confirm actions in any way.

Reviewing user certification history



1. Log into ForgeRock Identity Governance and navigate to the User Certifications table in the My Review Tasks view.
2. Click the tab marked Closed in the status selection row. The closed certifications table will be displayed with the following data.

- Display columns
  - Campaign Name
    - Description: Name of the active campaign
    - Searchable: Yes
    - Sortable: Yes
  - Certifier
    - Description: Certifier that is assigned to the campaign, either the logged in user or the role that they belong to
    - Searchable: No
    - Sortable: No
  - Campaign Start Date
    - Description: Date the campaign was initially kicked off
    - Searchable: No
    - Sortable: Yes
  - Completed On
    - Description: Date that the certification was completed
    - Searchable: No
    - Sortable: Yes

3. Locate or search for the campaign in the certifications table that you wish to review.
4. Click on the campaign to navigate to the certification list for the selected campaign.

NOTE

In certain scenarios, it is possible for a user to have access to certify a campaign as two different certifiers, in which case the user will have to choose which role or ID to access the campaign as. For a more detailed description of this functionality, refer to Section Reviewing and Certifying a User Certification.

NOTE

Visibility of closed certifications that were completed by authorization role certifiers is determined by the user's access at the time of viewing the certification tables. This means that a user that is granted an authorization role after a certification has been completed will still be able to see that certification within the closed tab of this view.

Closed user certification list

The closed user certification list functionality is the same as described in section Creating New Certification Definitions for active certifications, with a few minor exceptions described below. For more detailed information on this page and the information it contains, please refer to that section of the document.

- Stage actions are no longer available on a certification that is closed.

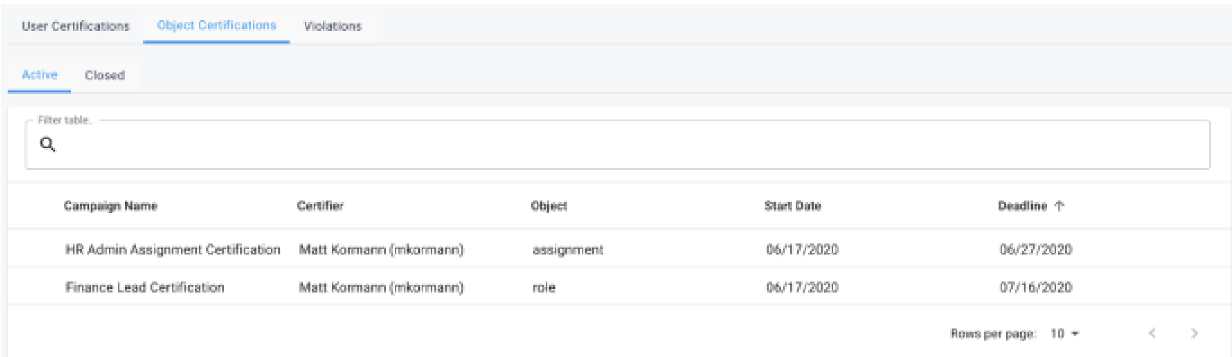
Closed user event details

The closed event details functionality is the same as described in section User Event Details for active certifications, with a few minor exceptions described below. For more detailed information on this page and the information it contains, please refer to that section of the document.

- Event actions buttons will not appear at the top of the event details screen
- Completion date will display in the event information section
- Entitlement row action buttons are disabled and cannot be changed on a closed certification
- Comment pages for entitlements with no existing comments will not be clickable.

Object certifications

Object Certifications Table



Display columns

- Campaign Name
    - Description: Name of the active campaign
    - Searchable: Yes
    - Sortable: Yes
- Certifier

    - Description: Certifier that is assigned to the campaign, either the logged in user or the role that they belong to
    - Searchable: No
    - Sortable: No
- Type
    - Description: Type of object being certified
    - Searchable: Yes
    - Sortable: Yes
- Start Date
    - Description: Date the campaign was initially kicked off
    - Searchable: No
    - Sortable: Yes
- Deadline
    - Description: Deadline of the tasks assigned to the user
    - Searchable: No
    - Sortable: Yes

Reviewing and Certifying an Object Certification

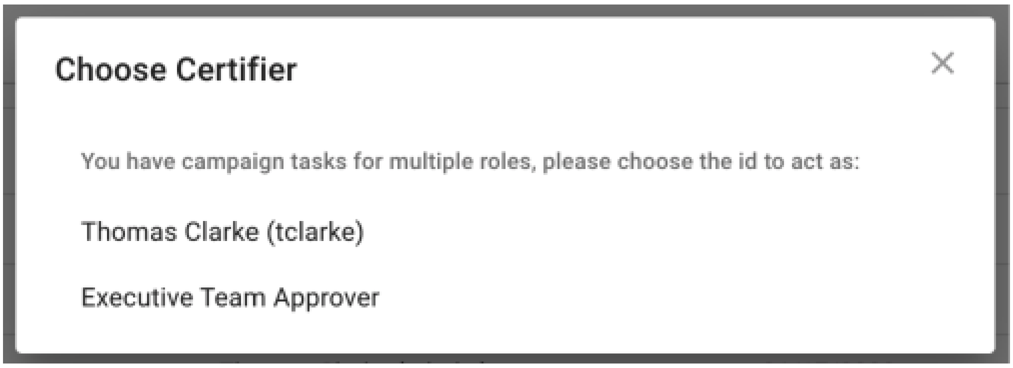
1. Log into ForgeRock Identity Governance and navigate to the Object Certifications table.
2. Locate or search for the campaign in the certifications table that you wish to review and/or certify.
3. Click on the campaign to navigate to the certification list for the selected campaign.

    NOTE

    In certain scenarios, it is possible for a user to have access to certify a campaign as two different certifier types. For example, if a user is a part of two different authorization roles that both are assigned as certifiers for one or more events in a campaign, then they can view that campaign as either of the two roles they are a part of. Since each individual role that a user belongs to can give the certifier visibility into different portions of a certification, a user is only able to view each campaign as a single acting certifier at a time.

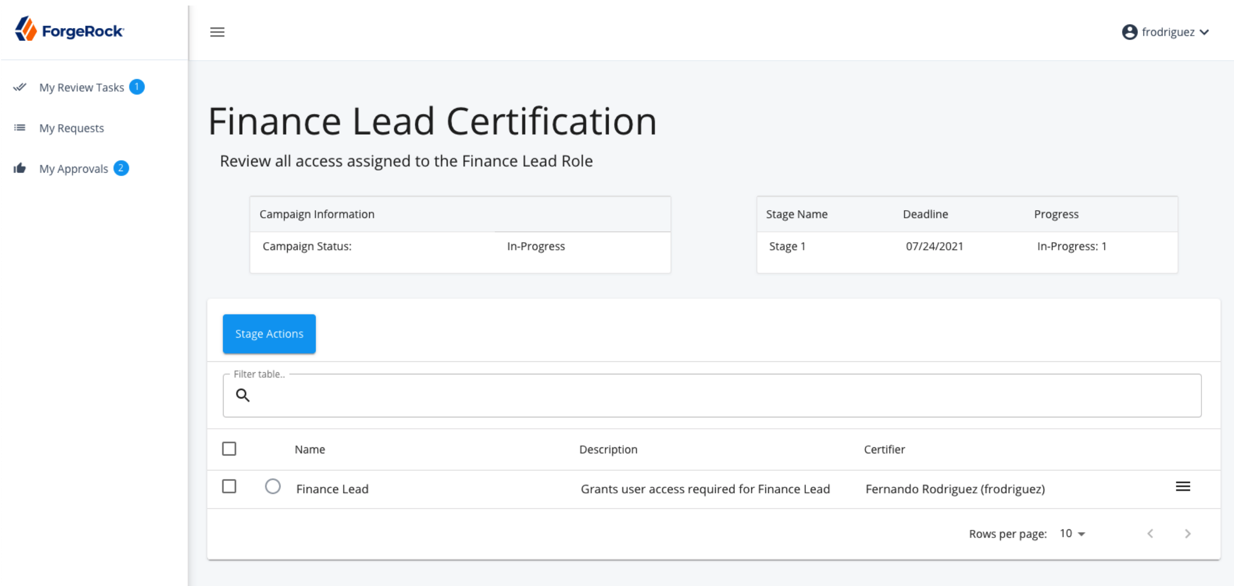
Campaign Name	Certifier
Executive Team Certification	Executive Team Approver
HR Lead Cert	Multiple Options
IT Administrative Access	Thomas Clarke (tclarke)

When this occurs, the user will see the term “Multiple Options” displayed underneath the certifier column. When the user chooses to click on a campaign with multiple certifier options, a page will be displayed informing them of the situation and instructing them to choose the certifier to act as. Once chosen the user will be redirected to the certification list.



Object Certification List

The certification list screen is the landing page for the certifier for a single campaign. The page is broken up into several sections, all of which are described in detail below.



Campaign Information

The campaign information box will display some basic information about the campaign being viewed, most notable the Campaign Status. For an active certification, the campaign status field will be marked in-progress. For a closed certification it will show the result of the certification, either signed-off, cancelled, expired, etc.

Stage Information

The stage information box will show a breakdown of the stages within the certification campaign that have tasks that are assigned to you. Each stage row will show the following information:

Stage Name	Deadline	Progress
Stage 1	07/08/2020	Reviewed: 2 In-Progress: 91

- Stage Name - The name given to the certification stage
- Deadline - The date that the stage's tasks are due
- Progress - The breakdown of the statuses of the stage events that are assigned to you.
    - In-Progress - event is active and not complete
    - Reviewed - event is active, completed, but not signed-off
    - Signed-off - event has been completed and signed-off.
    - Pending - event will be assigned to you when a previous stage is completed.

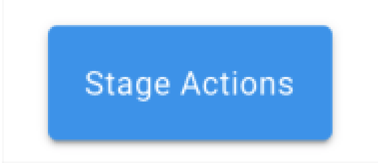
Stage Selector

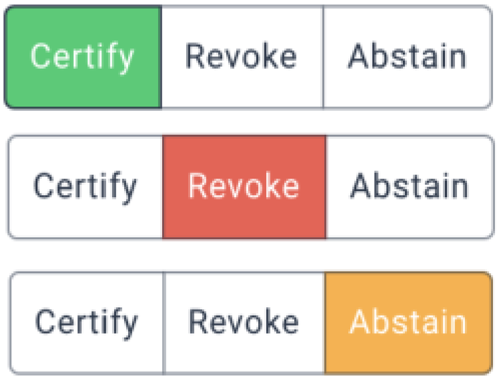
Shows a chronological visual of the certification stages. By selecting a stage node, the page will be updated to reflect data for the selected stage

When a different stage is selected, the user will be able to see information about the previous stage results or future stage events that match with the current list of events available to the certifier in the current stage. The user will not be able to see events in a previous or future stage that target objects that they are not responsible for certifying.

Stage Actions

Certifiers have access to a handful of stage actions at the certification list level. These are actions that will affect all or a selected subset of the targets within the certification. Certain actions will be available or unavailable depending on the status of the certification campaign (e.g. sign off will only be available if all or some of the events are reviewed or completed.) The full list of actions is as follows:





- Certify Selected - Certify all entitlements within the selected events in the stage that have not yet been acted on. Note that this action will NOT overrule any revoke or abstain decisions made previously. This action is only available if the governance administration team has enabled bulk certification.
- Certify Remaining - Certify all remaining entitlements within the stage that have not yet been acted on. Note that certify remaining only takes action on incomplete entitlements and will NOT overrule any revoke or abstain decisions made previously. This action is only available if the governance administration team has enabled bulk certification.
- Reset Selected - Reset all entitlement decisions within the stage for the events selected via checkbox, clearing all results.
- Reset All - Reset all entitlement decisions within the stage that have not been signed-off
- Claim Selected - Claim the events selected via checkbox. Claiming is available in role owned stages only, and is required for any single user within a role to take actions on an event. Claiming is only available to a single user within a role, once claimed that user must complete the task.
- Claim All - Claim all available events in the stage. Available in role owned stages only.
- Sign-Off - Finalize all actions taken and remove them from your tasks. Sign off is available as an option when all certifications in a stage are reviewed (single user certifier) or all claimed events have been reviewed (role certifiers) the sign off action is available. Choosing sign off will prompt the user to confirm the action. and once confirmed, the sign off will take effect.

Search Filter

Users can use the search filter above the certification target list to filter the visible list of objects included in the campaign. Any of the columns that are displayed within the table are eligible to be searched against except for the certifier column at the end of the row.

Table Headers

The table headers allow the user to sort the table contents based on the selected column. Clicking a column header will resort the table based on that criteria, and clicking it a second time will reverse the order of sorting. All columns contained in a certification list table are eligible to be used for sorting except for the certifier column at the end of the row

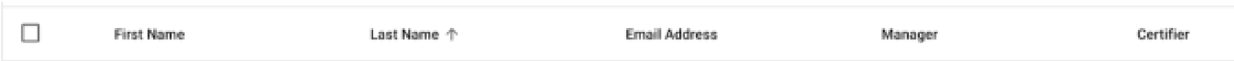


Table Rows

Each individual row within the certification list table contains the data for a single user or object event within a certification. At the beginning of each row is a checkbox used for selecting multiple rows at a time to take bulk stage actions on. The rest of the row contains the data for that event that corresponds to the headers found at the top of the table.

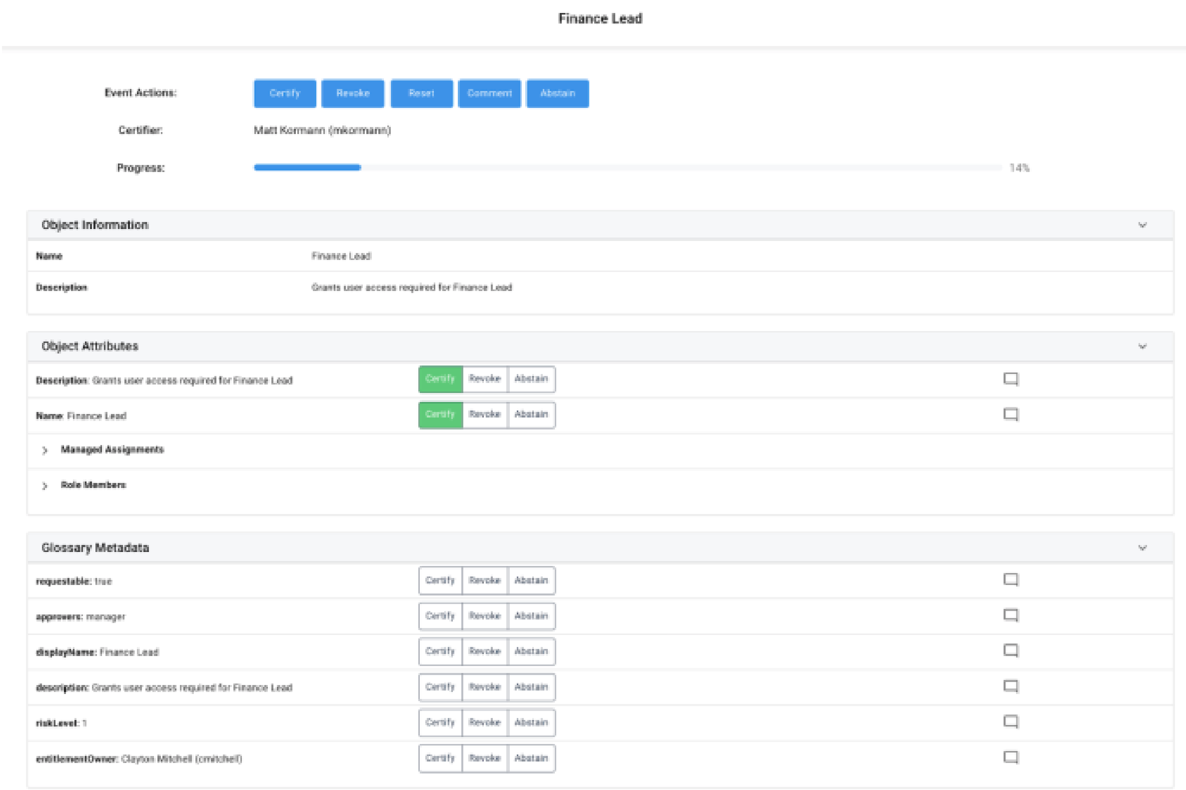
In order to view the event details of a given event, simply click on the row of the desired event and the details page will dropdown from the top of the page. This is how the user can navigate to the screen to make their certification decisions.

Pagination Controls

Pagination controls allow the end user to cycle between different pages of results for the given campaign stage. Users also have the ability to choose a rows per page option, to display more or less results per page. The options available are 10, 25, and 50 per page.

Object Event Details

The event details page for a certification is a complete view of an individual certification event that targets a single user or object. This is where the certifier makes their decisions on certifying or revoking entitlements for the target of the event.



Target Display Name

The top of the event details page will have the target's display name displayed. For objet certifications, this will be the glossary defined display name for the object being certified.

Event Information

The event information section will contain several different pieces of information that correspond to the active event. Based on the status and definition of the certification campaign, several of the following rows may or may not be visible:

- Stage Selector - Similar to the stage selector on the object certification list screen, when a target in a given campaign has multiple stages there will be a stage selection component available for the certifier to quickly toggle between stages. This can be useful for a certifier to look back at the decisions previously made by another certifier to help in their choices.

- Event Actions - List of actions that are available to the certifier to take at the event level. The actions are described below:

- Certify - Take the certify action on all available entitlements within the event. This action does **not** take precedence over individual revoke and abstain actions. The revoke and abstain actions still persist after selecting the certify action.
    - Revoke - Take the revoke action on all available entitlements within the event. This action is the highest precedence action, and overrules any previously made abstain or certify decision.
    - Reset - Reset the entire event's decision back to its initial state. The only thing that persists after a reset are comments made on an individual entitlement.
    - Comment - Add a comment on the certification event.
    - Abstain - Take the abstain action on all available entitlements within the event. This action takes precedence over previous certify actions but will not overrule any previously made revoke decision.
    - Claim - If the event certifier is an authorization role, the user has the ability to claim the event if it is currently unclaimed by another user. Once claimed, the user can then act on the certification.
- Certifier - The user or role assigned as the certifier of the event.
- Claimed By - If the event certifier is a role and the event has been claimed by a user, that user will be displayed here.
- Completion Date - Date of completion, If the event has been reviewed and signed-off.
- Progress Bar: Percentage of certification decisions made on the displayed event.

Object Information

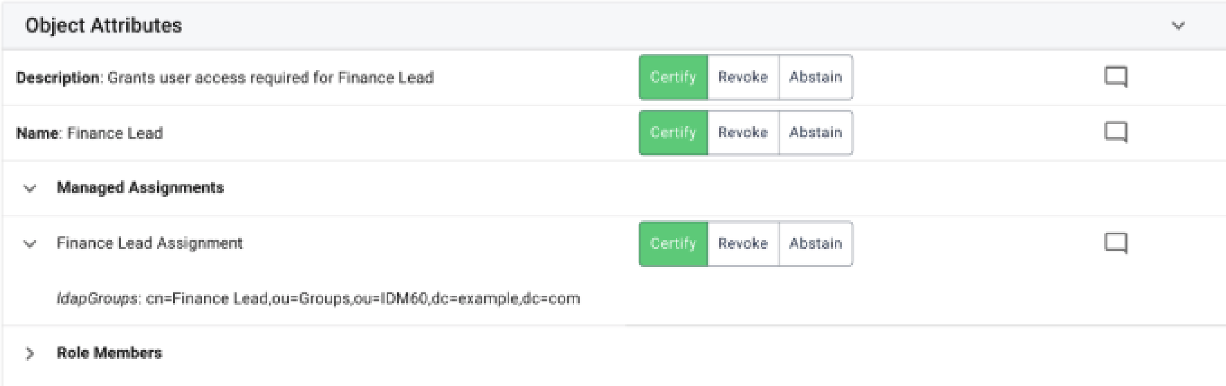
The Object Information table will display information about the target object for the given event.

Object Information	
Name	Finance Lead
Description	Grants user access required for Finance Lead

The table always includes the name and description of the object that is the target of the certification. To expand or collapse this table, click the icon at the top right of the table's header row.

Object Attributes

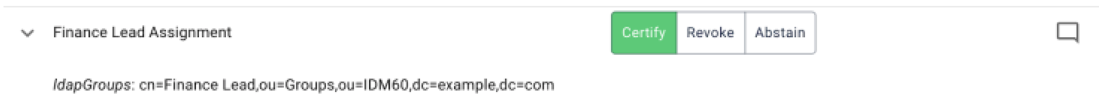
The object attributes table contains all of the entitlements that are assigned to the object and are directly tracked and controlled by ForgeRock Identity Manager.



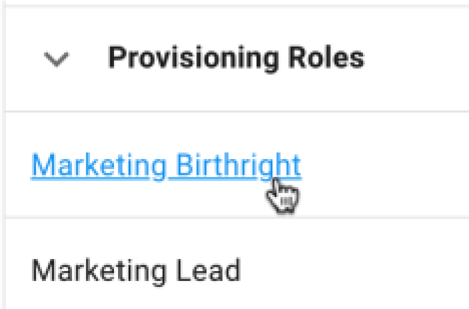
Each row within this table is organized into the following format:

- Attribute Name and/or Value
    - An entry that has a single value assigned to it (e.g. manager) will appear in the format [Attribute Name]: [Attribute Value]
    - An entry that has multiple values will be organized into rows beneath a single collapsible header row. A header row can be identified as just the attribute name in bold, with a collapse icon to its left, and no action buttons or comment icon within its row. Its entries will appear directly below, each in their own row, with just the entitlement name in the attribute column. See the rows for “Provisioning Roles” above.

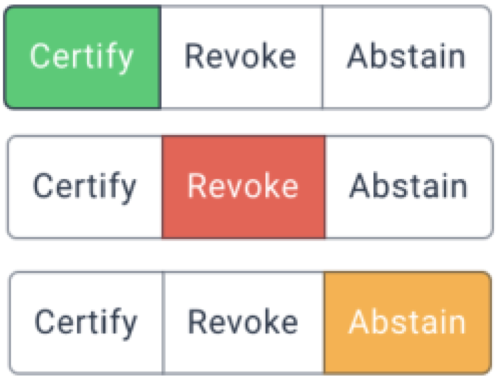
      To collapse an attribute and all its entries, simply click the collapse icon to the left of the name.
    - Any object certification that includes managed assignment entitlements will display those in the Object Attributes table using a slightly special format. Each assignment will list all of its attributes directly below the name of the assignment. This will give the certifier more insight into the actual contents of the assignment and the access it provisions. Each assignment name will have a collapse/expand icon to the left of its name if the certifier wishes to hide or show the extra information.

    - Each attribute name and value is clickable by the user to see any attached metadata that belongs to the given item. Those items that do not have a corresponding glossary entry will display a page informing the administrator that no entry exists. The certifier can use this information to better inform themselves of each entitlement that they are certifying, if need be.

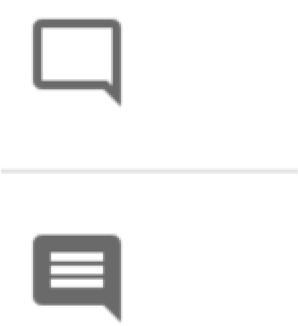


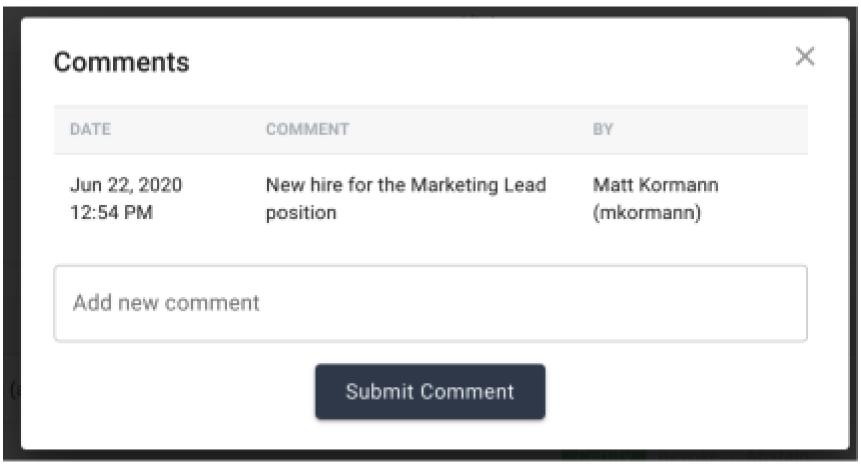
- Certification Action Buttons - these buttons allow the certifier to take action on each certifiable item within the event. Once an action has been selected, that button will be filled in with the color of the action. If no button is selected and filled, then no decision has been made for that item. The buttons included are listed below:
  - Certify
  - Revoke
  - Abstain



  To reset the action taken on the given entitlement, the certifier can click the action a second time to deselect that choice, essentially resetting their action.

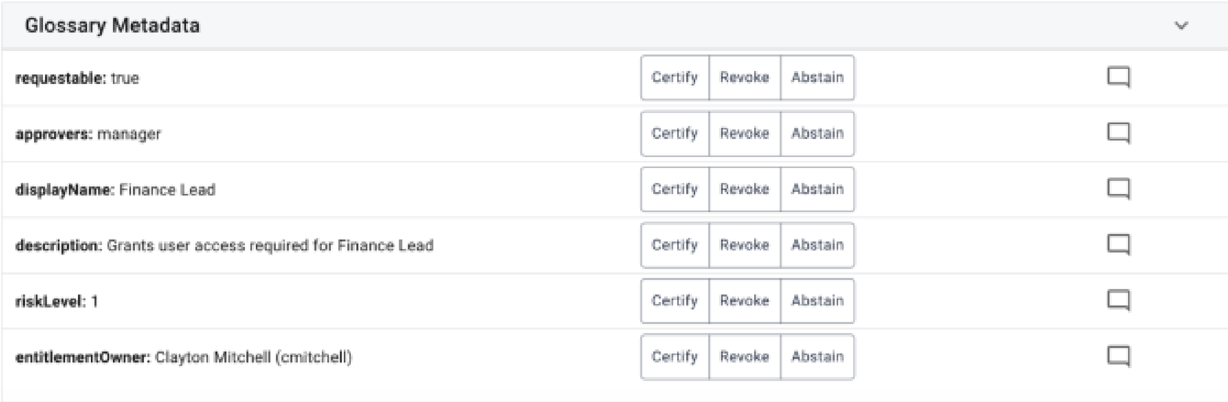
- Comment icon
  - The comment icon will either be unfilled if no current comments exist, or have mini comment lines inside of the icon to indicate there are existing comments (pictured below.) The user can click on the comment icon to display the existing comments, and also to add a new comment to that entitlement.



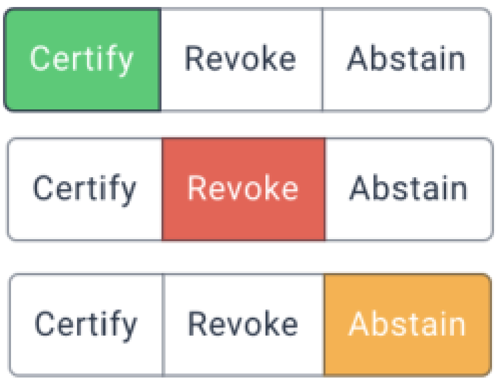


Metadata

This section contains the metadata that exists on the Identity Glossary object for the target object of the event. Each row within this table is organized into the following format:



- Attribute Name and Value
  - Each metadata entry takes up a single certification row, and is displayed in the format of [Key]: [Value]. The majority of the entries will appear here exactly as defined in the glossary, with the exception of managed object entries, which are displayed as formatted values (see: entitlementOwner above.)
- Certification Action Buttons - these buttons, disabled for administrators, will show the result of the certification action taken on each item if one has been made. If no button is selected and filled, then no decision has been made for that item. The buttons included are listed below:
  - Certify
  - Revoke
  - Abstain



  To reset the action taken on the given entitlement, the certifier can click the action a second time to deselect that choice, essentially resetting their action.

- Comment icon

    - The comment icon will either be unfilled if no current comments exist, or have mini comment lines inside of the icon to indicate there are existing comments (pictured below.) The administrator can click on the comment icon to display the existing comments, and also to add a new comment to that entitlement.

Closing the Event Details page

To close the event details page and return to the certification list simply click the 'X' icon in the top right of the page. Note that there is no submission or save action involved at this stage of the certification process. The actions that you make will persist on the certification event until changed, reset, or eventually signed-off. There is no need to confirm actions in any way.

Reviewing Object Certification History

1. Log into ForgeRock Identity Governance and navigate to the Object Certifications table in the My Review Tasks view.
2. Click the tab marked Closed in the status selection row. The closed certifications table will be displayed with the following data.
    - Display columns
        - Campaign Name
            - Description: Name of the active campaign
            - Searchable: Yes
            - Sortable: Yes
        - Certifier
            - Description: Certifier that is assigned to the campaign, either the logged in user or the role that they belong to
            - Searchable: No
            - Sortable: No
        - Campaign Start Date
            - Description: Date the campaign was initially kicked off
            - Searchable: No
            - Sortable: Yes
        - Completed On
            - Description: Date that the certification was completed
            - Searchable: No
            - Sortable: Yes

3. Locate or search for the campaign in the certifications table that you wish to review.
4. Click on the campaign to navigate to the certification list for the selected campaign.

NOTE

In certain scenarios, it is possible for a user to have access to certify a campaign as two different certifiers, in which case the user will have to choose which role or ID to access the campaign as. For a more detailed description of this functionality, refer to Section Reviewing and Certifying a User Certification.

NOTE

Visibility of closed certifications that were completed by authorization role certifiers is determined by the user's access at the time of viewing the certification tables. This means that a user that is granted an authorization role after a certification has been completed will still be able to see that certification within the closed tab of this view.

Closed Object Certification List

The closed object certification list functionality is the same as described in section Object Certification List for active certifications, with a few minor exceptions described below. For more detailed information on this page and the information it contains, please refer to that section of the document.

- Stage actions are no longer available on a certification that is closed.

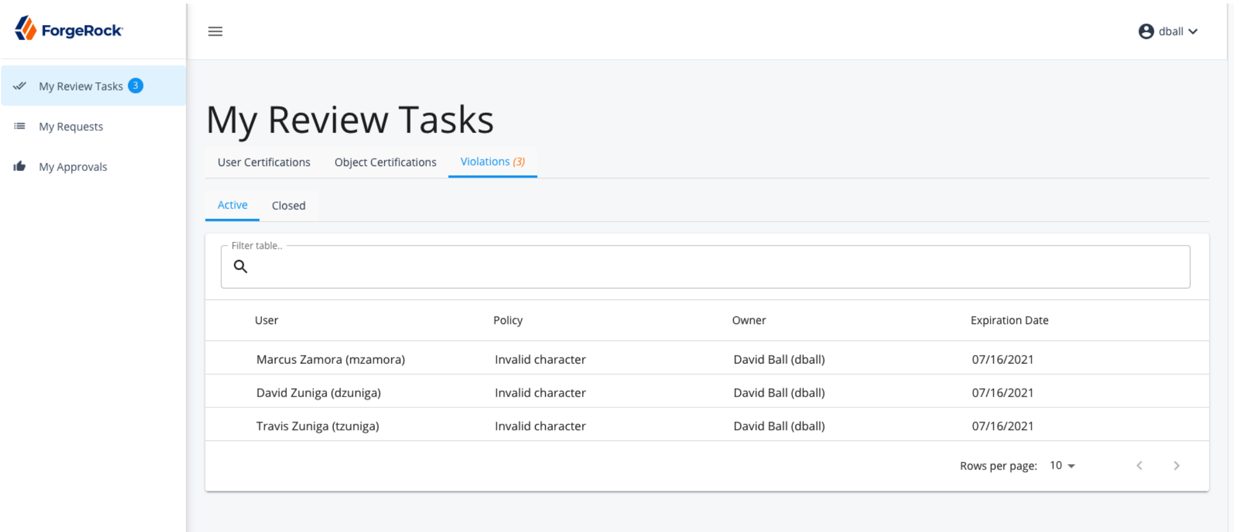
Closed Object Event Details

The closed event details functionality is the same as described in section Object Event Details for active certifications, with a few minor exceptions described below. For more detailed information on this page and the information it contains, please refer to that section of the document.

- Event actions buttons will not appear at the top of the event details screen.
- Completion date will display in the event information section.
- Entitlement row action buttons are disabled and cannot be changed on a closed certification.
- Comment pages for entitlements with no existing comments will not be clickable.

Policies

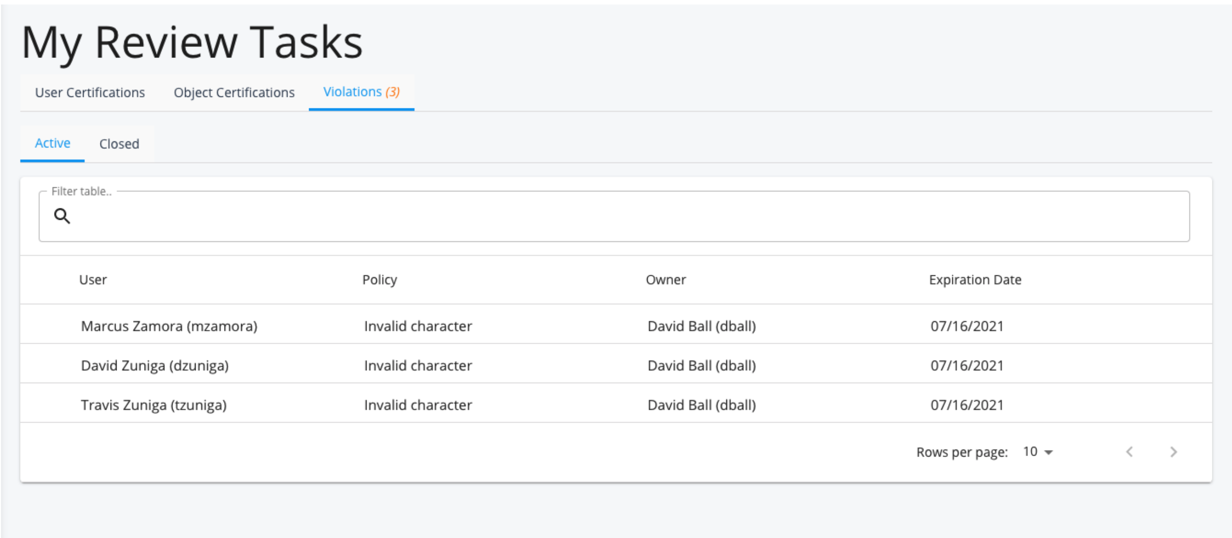
The policies feature allows for the creation of policy rules that define combinations of user details, roles or assignments, which constitute policy violations. When a scan is performed against a policy, violations are created for users based on the rules of the policy. The owner of the violation can choose to remove the violation via remediation or grant an exception to the user and allow the violation to exist for a defined period of time.



Managing policy violations

Policy violations are created as a result of scans against policies and assigned to an owner specified in the policy. The violation details the policy violated, the user in violation, the date it was detected, and a description of the policy itself.

To view the current list of violations that are currently assigned to you or a role you belong to, navigate to the Violations tab of the My Review Tasks screen.



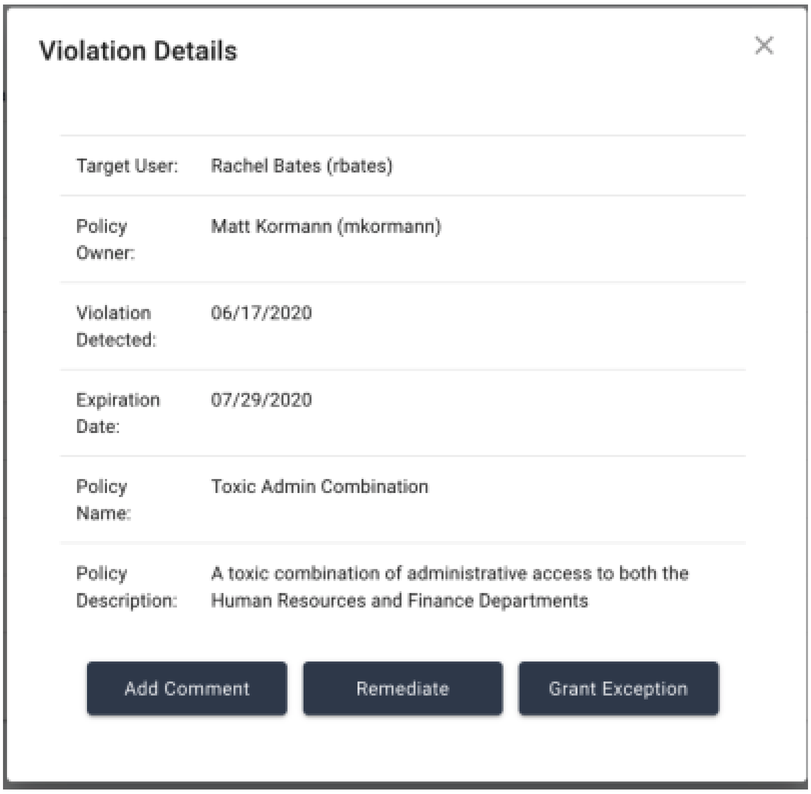
Violation table

- Display columns

- User
  - Description: User who has violated the policy
  - Searchable: Yes, by userName
  - Sortable: No
- Policy
  - Description: Name of the policy the user violated
  - Searchable: Yes
  - Sortable: Yes
- Owner
  - Description: User or role assigned as owner of the violation
  - Searchable: No
  - Sortable: No
- Expiration Date
  - Description: Date the violation task must be completed by
  - Searchable: No
  - Sortable: Yes

Viewing an active violation

To view the details of a specific violation, find the violation you wish to view in the violations table and click on it. Once clicked the View Violation page will appear with more details on the policy violation. The following fields are visible in the page:



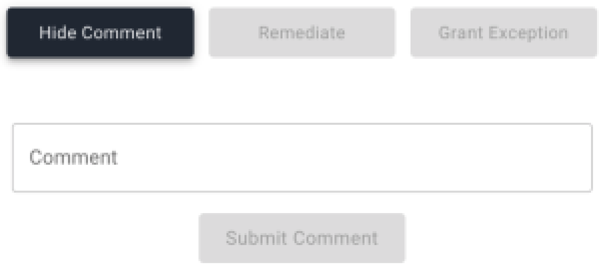
- Target User: The user who violated the policy
- Policy Owner: The user or role who is assigned the violation task
- Violation Detected: Date that the violation was found
- Expiration Date: Date that the task will expire
- Policy Name: Policy that was violated
- Policy Description: Description of the policy that was violated
- Comments: Any comments on the violation will appear at the bottom of the violation view screen
  - Date: Date comment was made
  - Comment: The message that was added
  - By: The person who made the comment
- Action Buttons
  - Add Comment
  - Remediate
  - Grant Exception

Violation actions

Violation owners have three available actions for the violation tasks that they have been assigned: Add Comment, Remediate, or Grant Exception. The details and description of each action are described below.

Add comment

Users have the ability to add a comment to a violation for any number of reasons. Whether it's to leave a note for themselves to follow up on the violation, an explanation of their upcoming decision, or a reminder to another member of their role to take a certain action. To add a comment, the user can simply click on the Add Comment button which will reveal a simple comment form. Type the comment into the text field and click the 'Submit Comment' button to save the comment to the violation. Once submitted, the user will be able to see their added comment in the comments section of the violation.

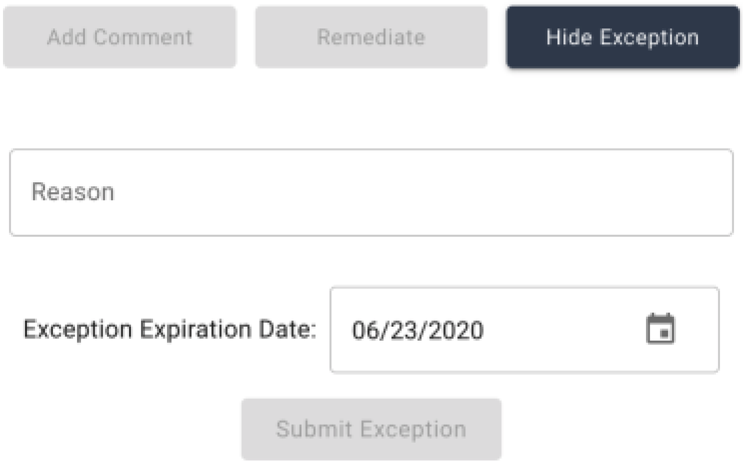


Remediate

If the violation owner has decided that the user should not be violating the policy in question and needs to have their access remediated, they can choose to click the 'Remediation' button in the violation action buttons row. When clicked, the violation will immediately be sent to the remediation workflow that exists within the policy definition.

Grant exception

If the violation owner determines that the user who has violated the policy has done so under circumstances that should allow them to continue to violate the policy for a period of time, they can choose to grant an exception to the violation. To do so, the user can click on the 'Grant Exception' button in the violation actions row. Doing so will expand a form for submitting an exception, which includes selecting an expiration date for the exception and entering in a comment justifying the reason that the exception was granted. Once the form has been completed, clicking 'Submit Exception' will complete the violation task and not take any steps to remediate the access violated in the policy.



Viewing closed policy violations

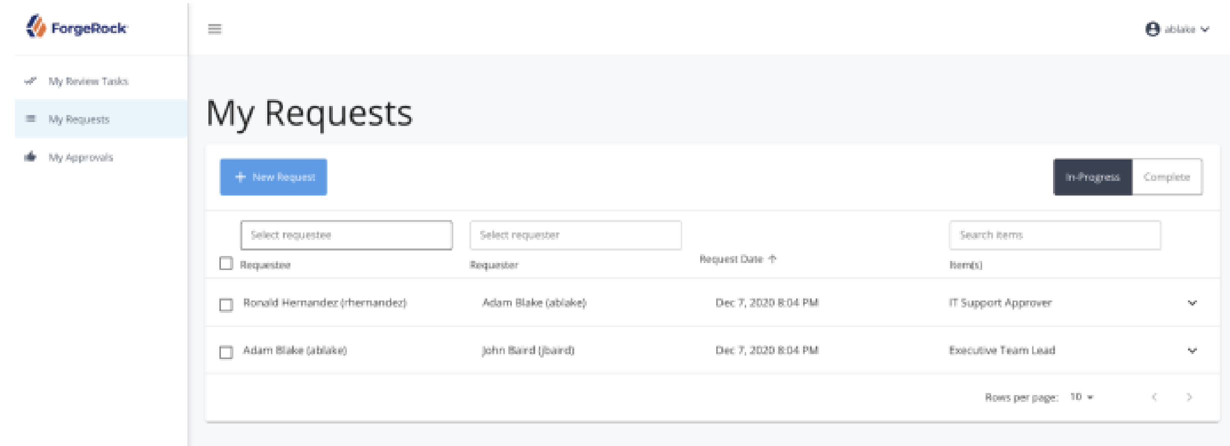
To view the details of a closed violation, navigate to the Violations tab of the My Review Tasks screen, and click on the Closed tab within the status selector row. Next, find the violation you wish to view in the violations table and click on it. Once clicked the View Violation page will appear with more details on the closed policy violation. The following fields are visible in the page:

- Target User: The user who violated the policy
- Policy Owner: The user or role who is assigned the violation task
- Violation Detected: Date that the violation was found
- Exception Start Date: (if exception granted) Date that the exception was granted
- Exception End Date: (if exception granted) Date that the exception expired
- Completed By: User that completed the task
- Completion Date: Date task was completed
- Policy Name: Policy that was violated
- Policy Description: Description of the policy that was violated
- Comments: Any comments on the violation will appear at the bottom of the violation view screen
    - Date: Date comment was made
    - Comment: The message that was added
    - By: The person who made the comment

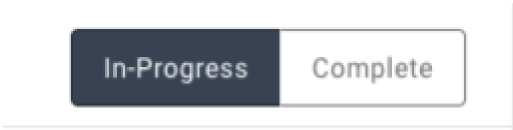
> NOTE
>
> Closed policy violations no longer allow any actions to be taken, and so the violation action buttons are not visible on closed violations.

My requests

The My Requests page allows you to view all requests, either in progress or completed, for which you are either the requester (submitted by you) or the requestee (submitted by someone else to grant you access.)



My Request Table



The table includes the following columns:

- Requester - user who submitted the request
- Requestee - user for whom the access is requested
- Request Date - date the request was submitted
- Item(s) - items that are included as part of the request

Table Filters

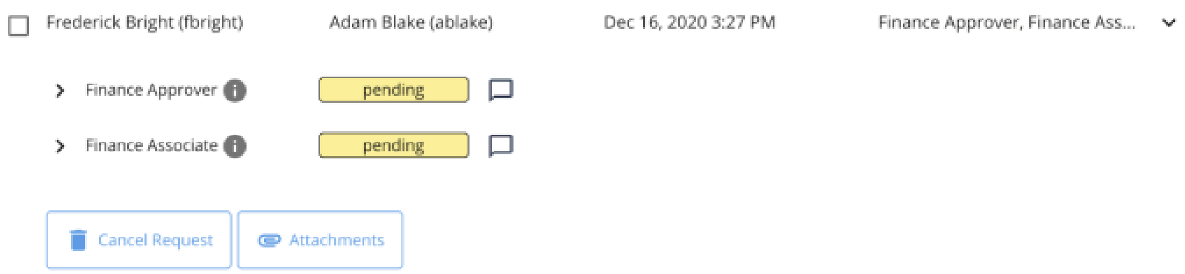
The requests table can be filtered using any of the following options: * Status: **In Progress - Shows all in-flight request that are still waiting on one or more user approvals to be processed** Complete - All previously completed requests that have either been completed by all necessary approvers or cancelled by the requester or an administrator.

- Requester: Select a user using the typeahead input box above the column label to display only requests where they are the requester.

- Requestee: Select a user using the typeahead input box above the column label to display only requests where they are the requestee.
- Item: Select a requestable item using the typeahead input box above the column label to display only requests targeting a specific item.
- Request Date: Not specifically a filter, however the current list of results within the table can be sorted by request date, either ascending or descending, by clicking on the column label “Request Date.”
- Table Pagination: The requests table allows the user to choose the amount of rows they would like to see within the page of results (10, 20, or 30.) The user has the ability to scroll through subsequent pages of request results by clicking the navigation arrows to move forward or backward.

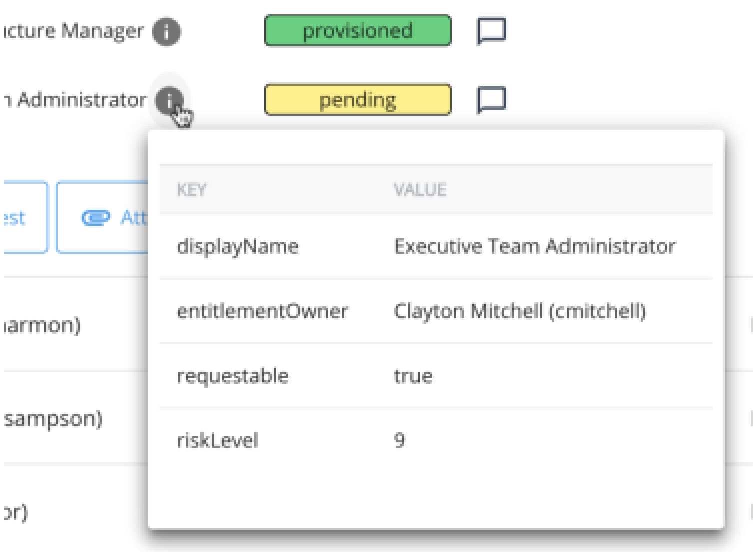
Request Information

Clicking on an individual request will open an extended panel showing the entire request process, grouped by each individual requested item.



The expanded view of a request shows a list of all of the items that are included as part of a request. Each line includes the following information:

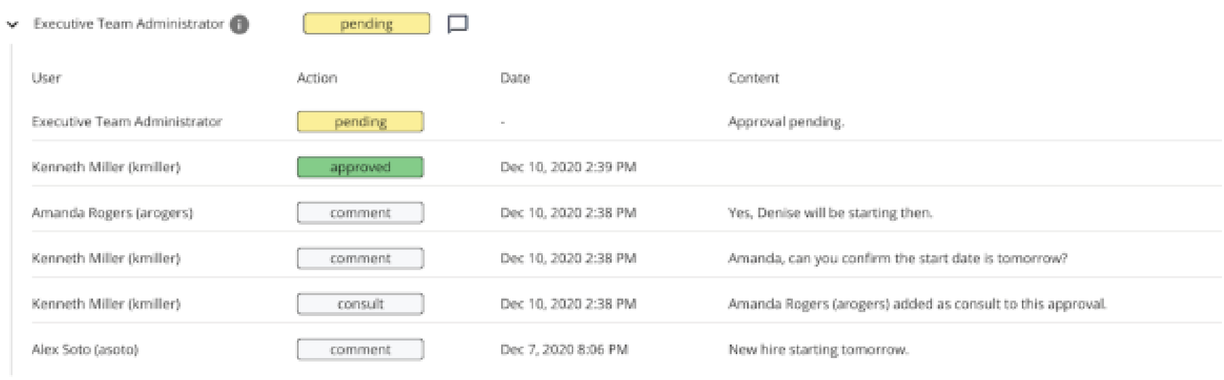
- Item - The display name of the item
- Info Icon - Get more information on the requested item. Hovering over this icon will expand a page containing all displayable metadata for the item.



- Remove Icon - Any requested item that was requested to be removed will have a small, red minus icon next to its info icon.
- Status - The current approval outcome of each item.
    - Pending - Item request is in-progress and still awaiting action by one or more approvers.
    - Denied - Item has been rejected during one of its approval tasks.
    - Provisioned - Item has completed its approval chain, and has been successfully provisioned to the user.
    - Not Provisioned - Item has completed its approval chain, but has not been provisioned to the user. This means one of the following has occurred:
        - An error during provisioning
        - The user already had the specific access requested
        - The item has a manual provisioning task, which the provisioner completed as “Not Provisioned”
    - Cancelled - Request has been cancelled before this item has completed its approval process.
- Comment Icon - Clicking this icon allows the user to add a comment to the given item’s history.

Request Item History

In addition to the information presented initially, each individual line item can be clicked and expanded to reveal a chronological history of the actions taken as part of that item’s approval process. This includes comments made, approval task information, reassign or consult actions, file uploads, and more.



Executive Team Administrator pending

User	Action	Date	Content
Executive Team Administrator	pending	-	Approval pending.
Kenneth Miller (kmiller)	approved	Dec 10, 2020 2:39 PM	
Amanda Rogers (arogers)	comment	Dec 10, 2020 2:38 PM	Yes, Denise will be starting then.
Kenneth Miller (kmiller)	comment	Dec 10, 2020 2:38 PM	Amanda, can you confirm the start date is tomorrow?
Kenneth Miller (kmiller)	consult	Dec 10, 2020 2:38 PM	Amanda Rogers (arogers) added as consult to this approval.
Alex Soto (asoto)	comment	Dec 7, 2020 8:06 PM	New hire starting tomorrow.

The history view is organized as a table that includes the following columns:

- User - The user who took the specified action on the item. In the event that the system acts directly on the request, for example during a task expiration, this column will read “SYSTEM.”
- Action - The action taken on the request. Possible values are listed below
  - Pending - An in progress approval task awaiting action
  - Approved - A completed approval task that was manually approved
  - Rejected - A completed approval task that was manually rejected
  - Auto-approved - A completed approval task that was auto-approved
  - Auto-provisioned - Indicator that item required no approval
  - Cancelled - A completed approval task that was cancelled in-progress
  - Comment - A generic comment referencing the item
  - Consult - Indicator that a consult was added to an approval task
  - File - Information on an uploaded file
  - Reassign - Information on a reassigned task
- Date - The date and time the action took place
- Content - The content of the action, which will vary depending on the specific action, but will always provide additional details as to what took place. Note that entries into this table for approval task completion may or may not have additional content to display.

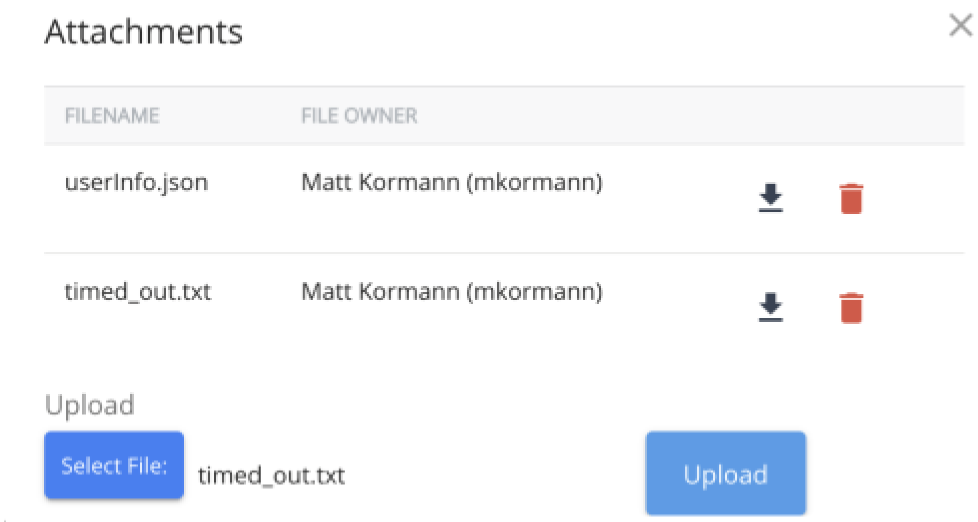
NOTE

Any approval task that is currently pending/in-progress for the given item will always appear at the top of the item’s history and will be listed as pending.

Action Buttons

Requesters/requestees also have access to take certain actions on individual requests via the row of action buttons found at the bottom of the expanded view. Each action is detailed below:

- Cancel Request - Cancel the request, including all currently in-progress tasks. The administrator will be asked to confirm the action before it is completed. Note that any item in a given request that already has a finalized outcome (Provisioned, Not Provisioned, Denied, etc.) will not be affected by a cancellation. Once an item is complete, the provisioning action can not be reversed.
- Attachments - Allows the user to view the current list of attachments assigned to this request, download any of those files, or upload a new file.



If there are any files attached to the request, the files table will appear at the top of the page. This table consists of three columns:

- Filename - Name of the uploaded file
- File Owner - User who uploaded the file to the request
- Action Buttons
    - Download Icon - Click to download the file to your local machine
    - Delete Icon - Click to remove the file from the request

At the bottom of the page will be the upload file form for adding files to the request. To choose the file you want to upload, click on the Select File button to open up a file picker screen. Once you've selected the file, the name of the file chosen will appear next to the Select File button in the form. Finally, clicking on the Upload button to the right will complete the action and save the file to the request.

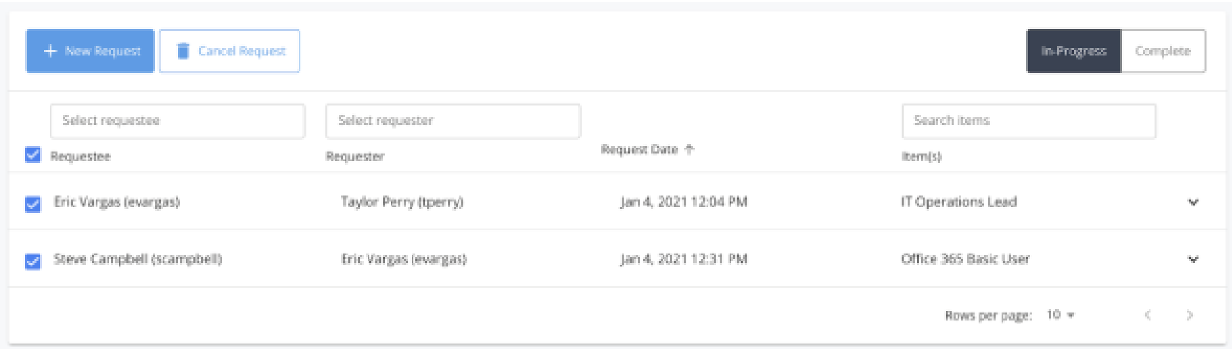
NOTE

NOTE

For requests with multiple items, it is possible to "attach" a file to only certain items within the request, so that the file is only visible to those approvers who need to see its contents, and not available to approvers who may not be responsible for that specific item. In these cases there will be an extra input as part of the upload form, that allows the uploader to select the items that the file is relevant to.

Cancelling Active Requests

When viewing in-progress requests for which you are the requester, you have the ability to select one (or more) requests and cancel the process. To do so, simply click the checkbox next to the request(s) you wish to cancel and click the 'Cancel Request' button that appears at the top left of the requests table.



You will be asked to confirm your cancellation and then will receive a confirmation message when the request cancellation process is complete.

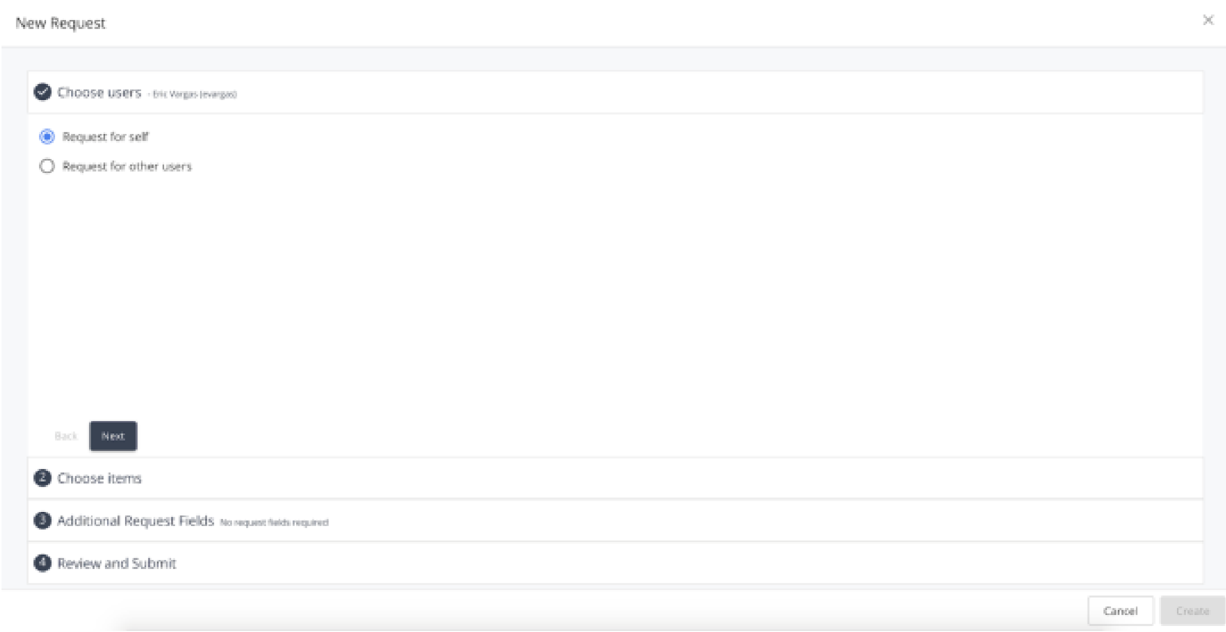
Alternatively, there is a button within the expanded view for each request that will allow the individual request to be cancelled.

NOTE

When you cancel a request in which one or more of the items have already been provisioned, those items will remain provisioned. Items are provisioned as their individual approval chains are completed, and at that point are considered final. Any items that were still awaiting any further approvals will not be provisioned.

Creating requests

To create a new request, click on the New Request button on the top left of the My Requests page to reveal the create request form.

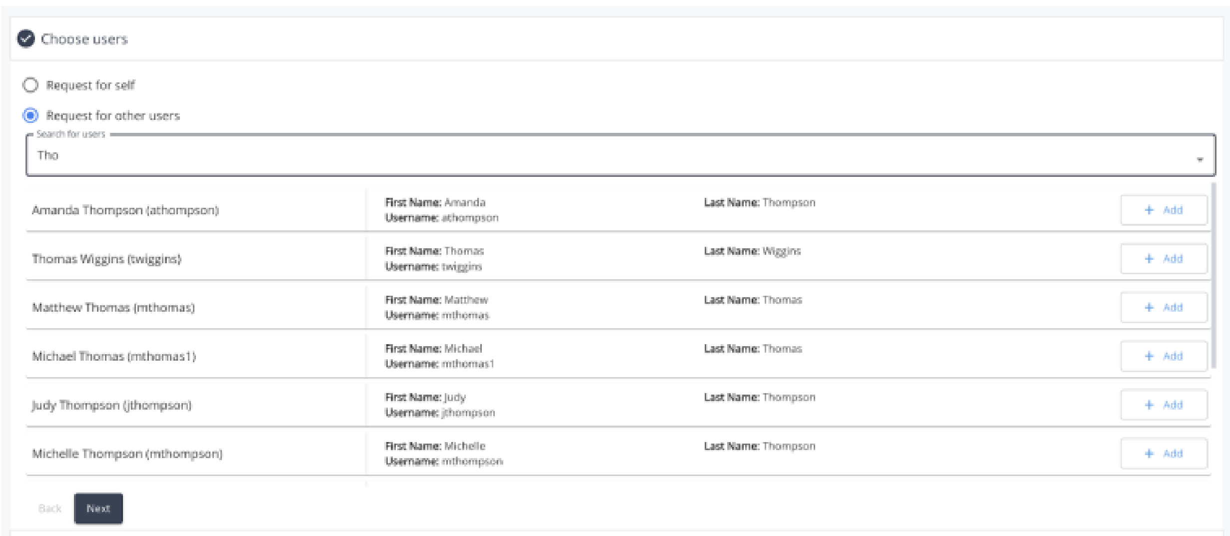


Create Request Form

The create request form consists of four sections that the user must complete in order to submit a request for access: Choose users, choose items, additional request fields, and review and submit. They are each described in detail below:

Choose Users

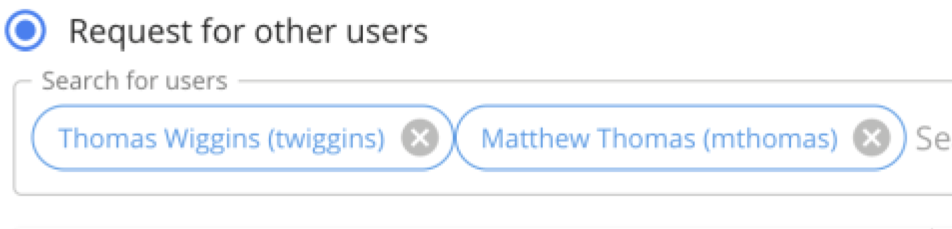
This section allows the requester to choose what users they would like to request access for. Two options are presented initially: Request for self or request for other users. The request for self option is a shortcut to allow the user to create a single requestee request targeting themselves. The request for others option will allow the user to search for and add one or more users to the request form individually. Note that this option can also be used to add the current user to the request, if requesting for access for yourself as well as others together.



Choose Users Search

When searching for other users, simply enter in the target search term for the desired user into the search box at the top of the section. As the user types, the results table will begin to display based on the text entered and the users found. Each entry within the table will display some additional information about the user to help the requester identify the correct person. The fields that are used to search the user base are configurable by administrators, and may vary depending on the individual environment, however the default searchable fields are first name, last name, and username.

Once the desired user(s) has been found, clicking the 'Add' button on the right side of the user result will add them to the request. Once added, a chip for the selected user will be added to the search box at the top of the form to indicate which users are currently part of the request. The header of the Choose Users section will also be updated to reflect the names of the selected users as well.

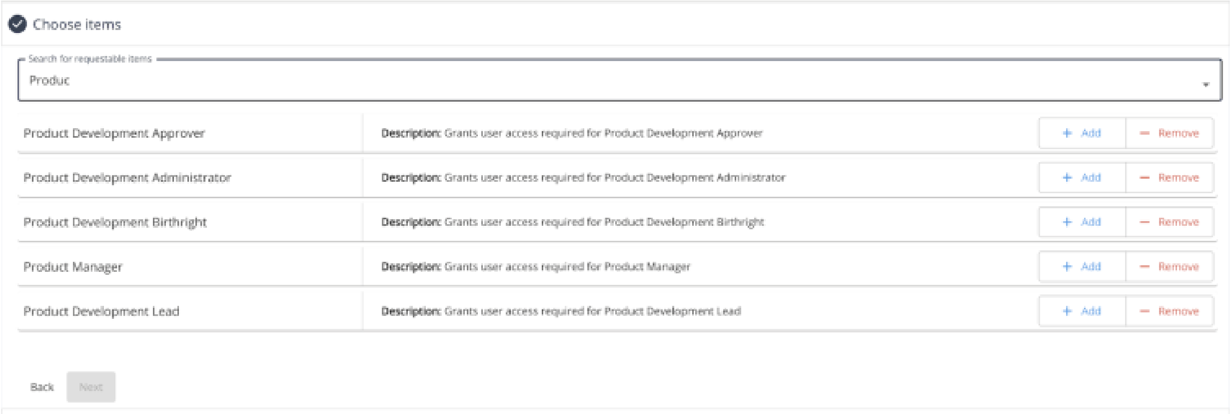


Choose Items

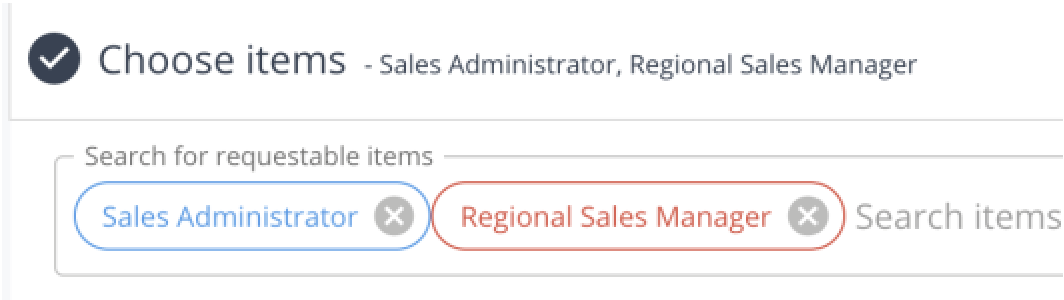
The choose items section is where the user can add one or more requestable items to the request.

Choose Items Search

When searching for requestable items, simply enter in the target search term for the desired item into the search box at the top of the section. As the user types, the results table will begin to display based on the text entered and the items found. Each entry within the table will display some additional information about the requestable item to help the requester identify the correct access to request. The fields that are used to search the requestable item catalog are configurable by administrators, and may vary depending on the individual environment, however the default searchable field will include the display name.

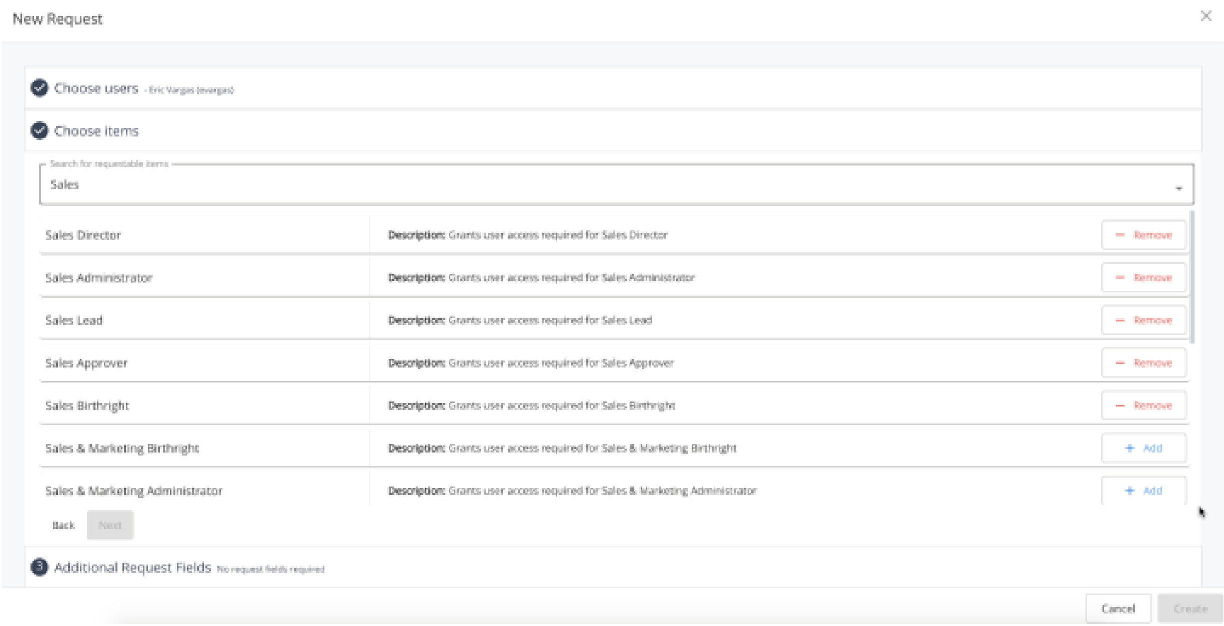


Once the desired item(s) has been found, there can be multiple options for adding an item to a request, depending on a few key factors (see below). By default, the user can choose to either 'Add' or 'Remove' the item within the request. Choosing 'Add' will add the item to the list of selected items to be requested and provisioned to the user. Choosing 'Remove' will add the item to the list of selected items to be requested to remove the access from the user. The two different request types (add/remove) can be differentiated by the color of the chip that appears within the item search field. Those items that are requests to add will appear in blue, while those that are requests for removal will appear highlighted in red.



Viewing User's Current Access

If certain criteria within the request form are met, the requester will be able to see some of the user's current access to assist in making their request. The criteria is as follows:



- The request is for a single user only
- The requestee is either the user themselves, or a direct report of the requester

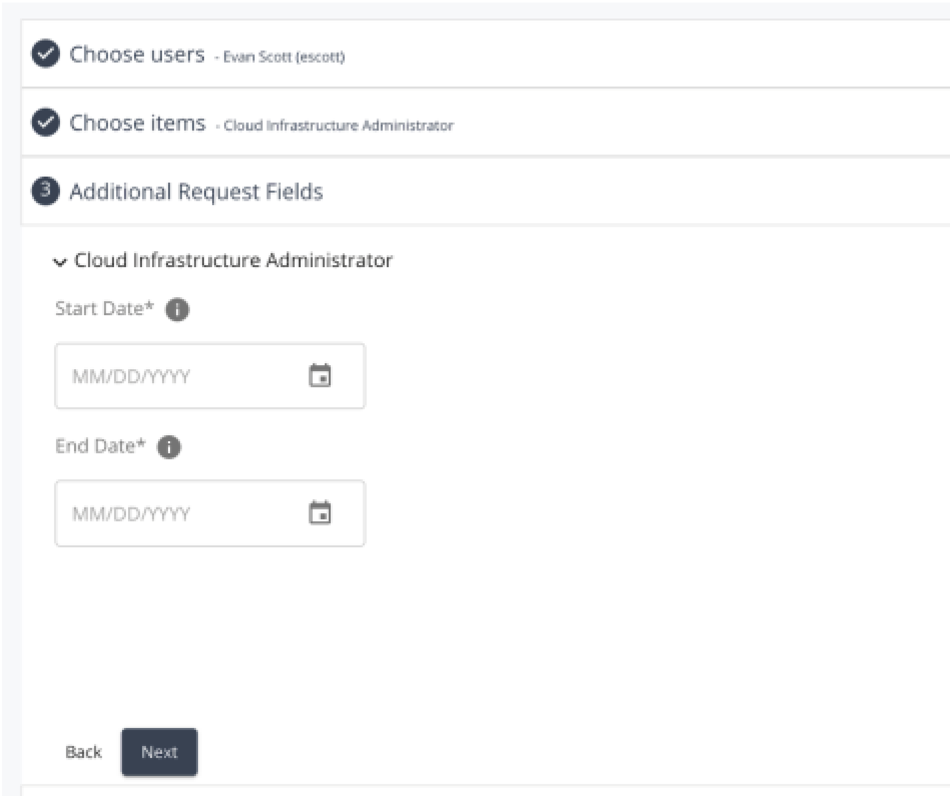
If those conditions are satisfied, any requestable item searched for that is directly managed by IDM (a managed user attribute or relationship, not disconnected) displays only an **Add** button or **Remove** button depending on whether the user already has access to that item.

For example, if a user is creating a request for themselves, and searches for Role “A” which they already have access to, they will only see the ‘Remove’ option available for that item within the request If they search for Role “B” that they do not have access to, they will only see the ‘Add’ option available.

Any access that the requestee user does currently have access to will bubble up to the top of the item search results, ahead of any items that they do not currently have.

Additional Request Fields

Certain requestable items may require or allow the requester to complete additional form fields in order to submit their request for approval. If no items within the request have any request fields defined, then this section will be marked as ‘No request fields required.’ and will not be expandable within the form. The request form will simply advance the user past this section and directly into ‘Review and Submit.’



When a requestable item does have request fields defined, then the Additional Request Fields section will populate with the form as defined for each item. Each item will have its own individual fields grouped together in an expandable section denoted by the item name. Clicking on the carat icon to the left of the item name will expand or collapse that section accordingly.

A single request field consists of the following components:

- Name - The name of the request field.
- Required - Any field that is required in order to submit the form will be denoted with an asterix.
- Information Icon - Hovering over the “i” icon will display additional information about that request field.
- Input - The text field/date picker/select box/etc. where the value is to be entered.

Requests with Multiple Request Fields

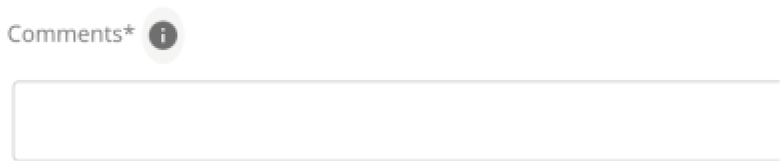
When requesting several items, it is likely that more than one of the items requires additional input within the request form. When that is the case, each item will have its own subsection with the Additional Request Fields section, denoted by the item name as mentioned above.

In addition, some of the chosen items may require the same fields to be submitted as the others. A common example of this would be multiple items that require a start and end date for the access to be provisioned. To save the user from having to potentially fill out the same form fields repeatedly, each item's subsection will have a "copy" icon available to click when any of its request fields appear elsewhere in the form. When clicked, any matching field found within the request body will have its value copied from the current item. Using the example above, when filling out a request form for three items that all include a start and end date, the end user could fill out the dates for the first item, click the copy button, and then move on to submit the request.

Request Field Types

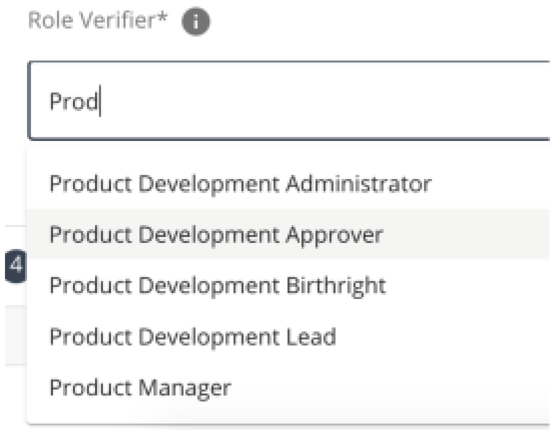
The following field types may appear within a create request form:

- Text - Basic text entry field



- Select - Dropdown select menu from a preset list of options.

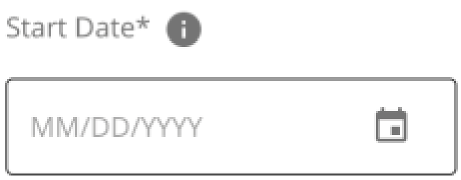
- Typeahead - Search for a value among a list of existing objects.



- Radio - Select one from a list of predefined options.

- Checkbox - Select one or more from a list of predefined options.

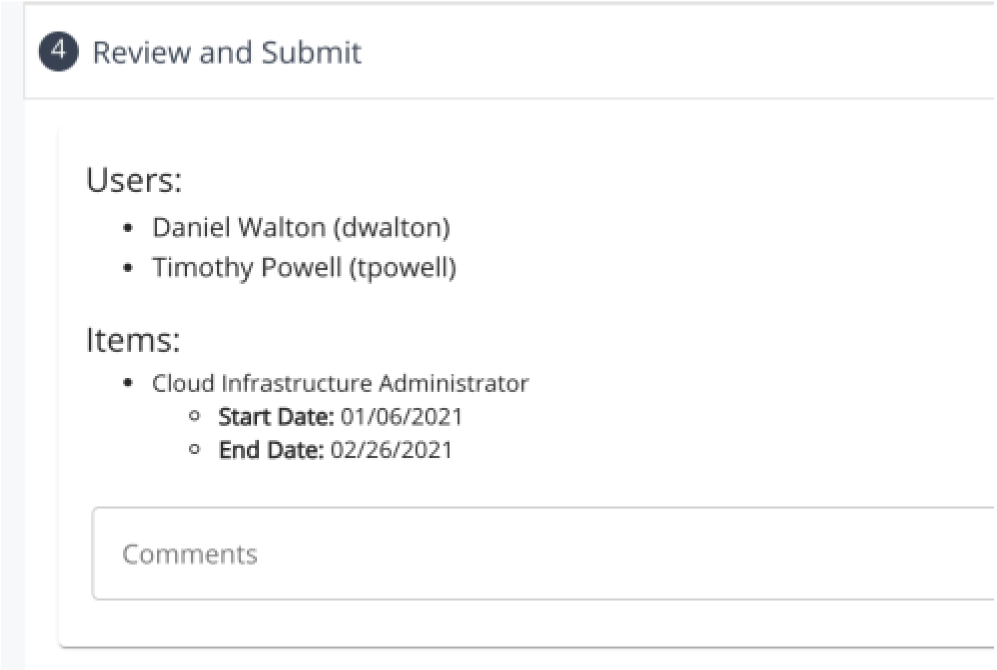
- Datepicker - Choose a date from a calendar date picker.



- File - Choose a file to upload from your local machine.

Review

When all of the above three fields have been completed, the review section will be available to see all of the request contents before submitting for approval.

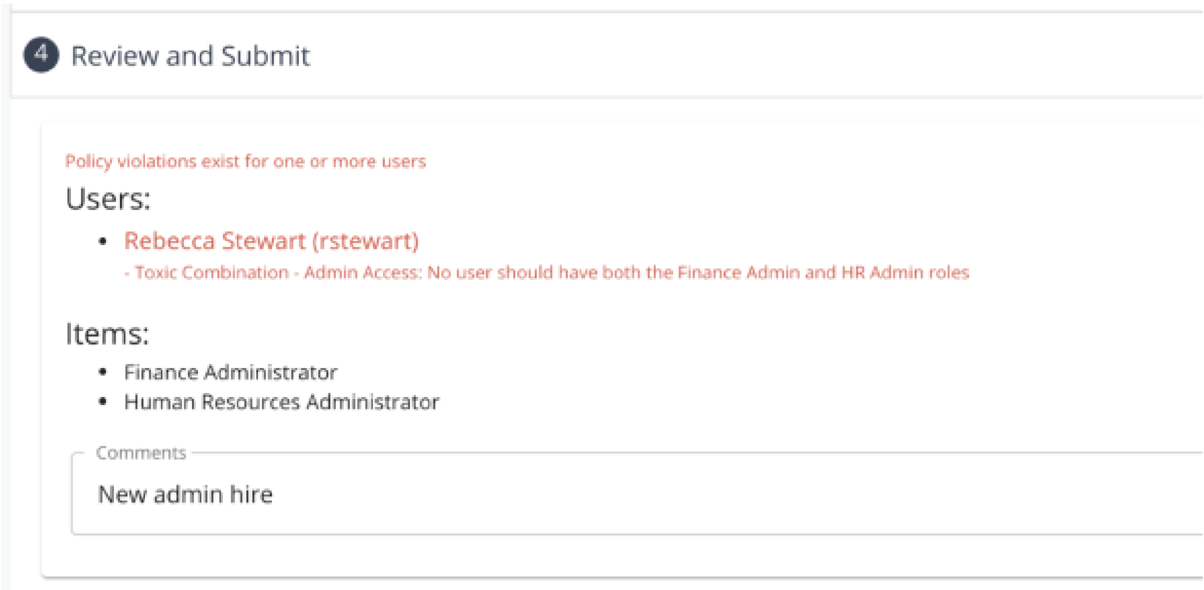


The review section is broken down into the users being targeted, the items being requested, and under each item, any request fields that were filled out during the process.

Additionally, there is a field available for the requester to make any general comments regarding the request to help with the process. Any comment made here will apply to all requestees and all items being targeted, and so will be visible to all approvers/admins/etc. This field is optional and is not required to submit a request.

Policy Violations

It is possible for administrators to enforce policy restrictions on the requests that users are able to submit. In the event that this functionality is enabled, any request that violates a policy defined in the system will not be eligible to submit within the request form. When a request violates one or more policies, and the user clicks create to attempt to submit the request, the user will be informed within the review section what policies are being violated, and by which user within the request. The error message displayed will contain the name of the policy, as well as a description of the policy, so that the requester can gain some insight as to what they are unable to request.



My approvals

The My Approvals page allows the user to view all approvals, either in progress or completed, for which they are the approver, a consult, or provisioner for. These include approvals that the logged in user is directly responsible for, or are assigned to a group/role that the user is a member of, and all types of tasks appear in one single, combined table. The three types of tasks are described below:

- Approver - User is responsible for approving or rejecting the items of access within the request.
- Consult - The approver for the task has asked the current user to assist in the approval process by providing commentary, insight, or an upload to the approval task.
- Provisioner - User is assigned the responsibility of manually provisioning the access listed within the request, and once completed, must attest to the provisioning (or non provisioning if deemed necessary) of the item(s).

My Approval Tables

The approvals table includes the following columns:

- Requester - user who submitted the request
- Requestee - user for whom the access is requested
- Approver - user or group to whom the task is assigned
- Due Date - date the approval should be completed by
- Item(s) - items that are included as part of the request

Table Filters

The requests table can be filtered using any of the following options:

- Status:
  - In Progress - Shows all in-flight tasks that are still waiting to be completed
  - Complete - All previously completed approval tasks that have been directly completed by the current user
- Requester: Select a user using the typeahead input box above the column label to display only requests where they are the requester.
- Requestee: Select a user using the typeahead input box above the column label to display only requests where they are the requestee.
- Approver: Select a user or group using the typeahead input box above the column label to display only requests where they are the approver.
- Item: Select a requestable item using the typeahead input box above the column label to display only requests targeting a specific item.
- Due Date: Not specifically a filter, however the current list of results within the table can be sorted by request date, either ascending or descending, by clicking on the column label "Request Date."
- Table Pagination: The requests table allows the user to choose the amount of rows they would like to see within the page of results (10, 20, or 30.) The user has the ability to scroll through subsequent pages of request results by clicking the navigation arrows to move forward or backward.

Approval Information

Clicking on an individual approval will open an extended panel showing the entire approval contents, grouped by item within the request.

The expanded view of an approval task shows a list of all of the items that are included as part of the task. Each line includes the following information:

- Item - The display name of the item
- Info Icon - Get more information on the requested item. Hovering over this icon will expand a page containing all displayable metadata for the item.
- Remove Icon - Any requested item that was requested to be removed will have a small, red minus icon next to its info icon.
- Action Buttons - The current approval choices available to the approver, or when complete, the choice that was previously made.
  - Approve - Approves the request of the individual item.
  - Reject - Reject the request of the individual item.

- Provisioned - For a provisioning task, select to attest that the item has been manually provisioned as expected.
- Not Provisioned - For a provisioning task, select to attest that the item has NOT been manually provisioned as expected. This can be used if there is a reason the provisioner has decided to not provision the access, or has determined that it should not be provisioned.

- Comment Icon - Clicking this icon allows the user to add a comment to the given item's history.

Request Item History

In addition to the information presented initially, each individual request item can be clicked and expanded to reveal a chronological history of the actions taken as part of that item's approval process. This includes comments made, approval task information, reassign or consult actions, file uploads, and more. This can provide the approver with more insight as to why the item was requested, whether it should be approved, who has approved the item previously, and more.

The history view is organized as a table that includes the following columns:

- User - The user who took the specified action on the item. In the event that the system acts directly on the request, for example during a task expiration, this column will read "SYSTEM."
- Action - The action taken on the request. Possible values are listed below
    - Pending - An in progress approval task awaiting action
    - Approved - A completed approval task that was manually approved
    - Rejected - A completed approval task that was manually rejected
    - Auto-approved - A completed approval task that was auto-approved
    - Auto-provisioned - Indicator that item required no approval
    - Cancelled - A completed approval task that was cancelled in-progress
    - Comment - A generic comment referencing the item
    - Consult - Indicator that a consult was added to an approval task
    - File - Information on an uploaded file
    - Reassign - Information on a reassigned task
- Date - The date and time the action took place
- Content - The content of the action, which will vary depending on the specific action, but will always provide additional details as to what took place. Note that entries into this table for approval task completion may or may not have additional content to display.

NOTE

NOTE

Any approval task that is currently pending/in-progress for the given item will always appear at the top of the item's history and will be listed as pending.

Approval Action Buttons

Approvers/consults/provisioners also have access to take certain actions on individual requests via the row of action buttons found at the bottom of the expanded view. Each action is detailed below:

- Reassign - When enabled by administrators, approvers have the ability to reassign an approval task to another user or group.
- Consult - Approvers have the ability to reach out to another user or group and assign them as a "consult" user to the current task. The user or group that is added to the task will be able to view the approval task within their own queue of approvals, but will only have the ability to comment on individual items or attach a file to the request. The approver has the ability to change the current user or group that is assigned as a consult, but only one consult is allowed to be assigned at one time.
- Attachments - Allows the user to view the current list of attachments assigned to this request, download any of those files, or upload a new file.

If there are any files attached to the request, the files table will appear at the top of the page. This table consists of three columns:

- Filename - Name of the uploaded file
- File Owner - User who uploaded the file to the request
- Action Buttons
  - Download Icon - Click to download the file to your local machine
  - Delete Icon - Click to remove the file from the request

At the bottom of the page will be the upload file form for adding files to the request. To choose the file you want to upload, click on the Select File button to open up a file picker screen. Once you've selected the file, the name of the file chosen will appear next to the Select File button in the form. Finally, clicking on the Upload button to the right will complete the action and save the file to the request.

NOTE

For requests with multiple items, it is possible to "attach" a file to only certain items within the request, so that the file is only visible to those approvers who need to see its contents, and not available to approvers who may not be responsible for that specific item. In these cases there will be an extra input as part of the upload form, that allows the uploader to select the items that the file is relevant to.

Completing an Approval

In order to complete an approval task and remove it from the queue, the approver must make a decision on all items within the task. Approval tasks cannot be submitted unless each item within the task has been acted on.

It is possible for administrators to require that a comment be made when the approver makes certain approval decisions, approve, reject, or both. When that requirement is enforced, clicking on the button for the given decision will cause a page to pop up for the approver to enter in a comment to justify their decision. This comment will be submitted once the approver submits the task, and will not appear in the request item history until after that happens. To adjust the comment before submission, the approver can simply re-select their decision on the item and re-enter the comment.

Once all items have been acted on, the submit button will be enabled, and clicking it will remove the task from the list.

Completed Approval Tasks

Clicking on the ‘Complete’ status button at the top right of the table will change the contents of the table to tasks that have previously been completed by the logged in user. Note that in this view, all user actions are disabled on the approval tasks. The action button taken by the approver will be highlighted for each item in the task, and the row of action buttons at the bottom of the task will not be present.