Identity and Access Management

Security Administrator Guide

February 18, 2015

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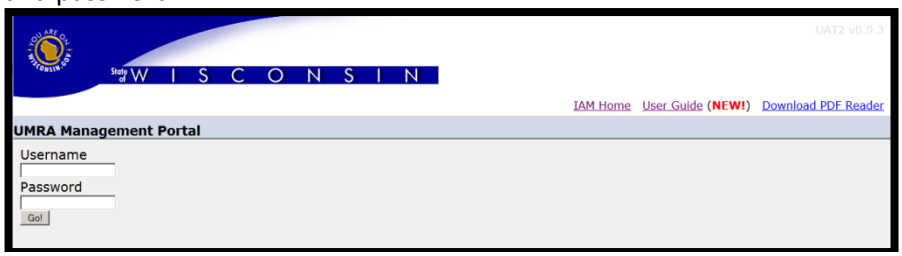
SECTION 1. SIGN ON TO UMRA / SEARCH FOR AN IAM USERID

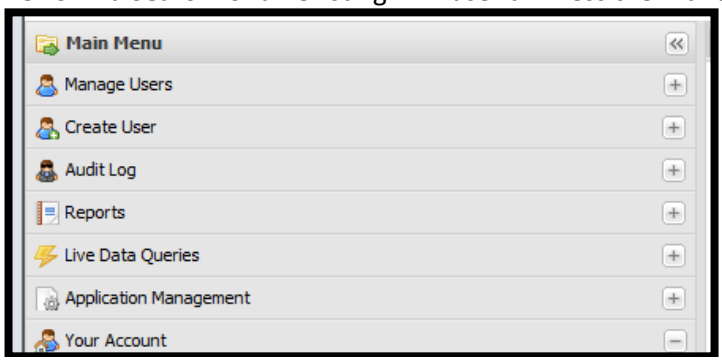
Sign On To Production UMRA

1. Log on to UMRA at URL is https://iam.wisconsin.gov/umra with your IAM Userid and password.

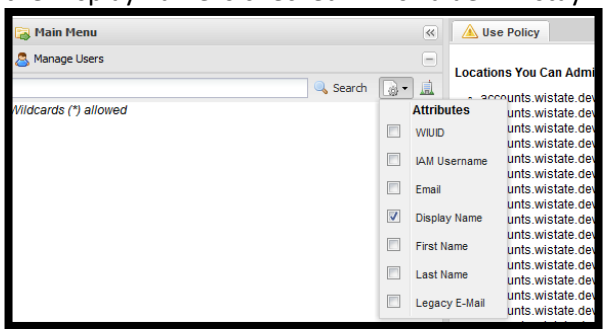


Search For an IAM Userid

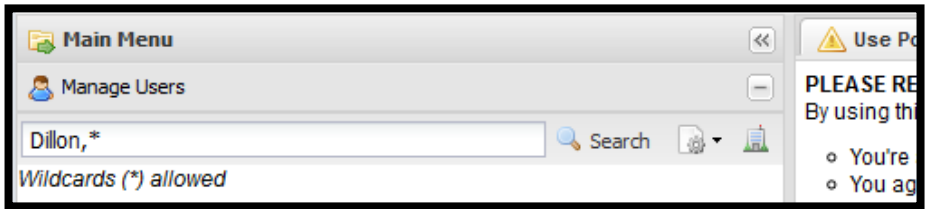
2. Perform a **Search** for an existing IAM userid. Press the **Manage Users** bar.



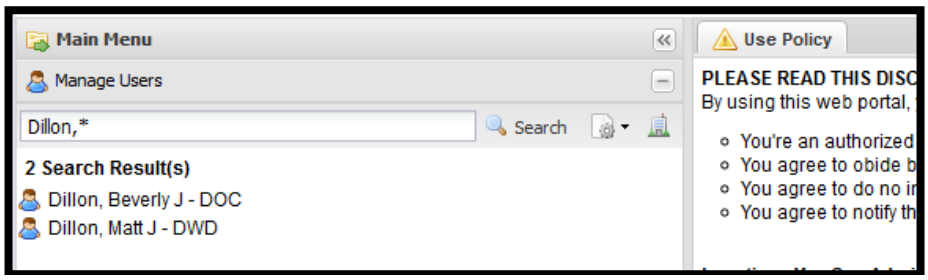
3. Press the **Attributes drop down icon** after Search box and make sure that only the Display name is checked. This value will stay in place until you change it.



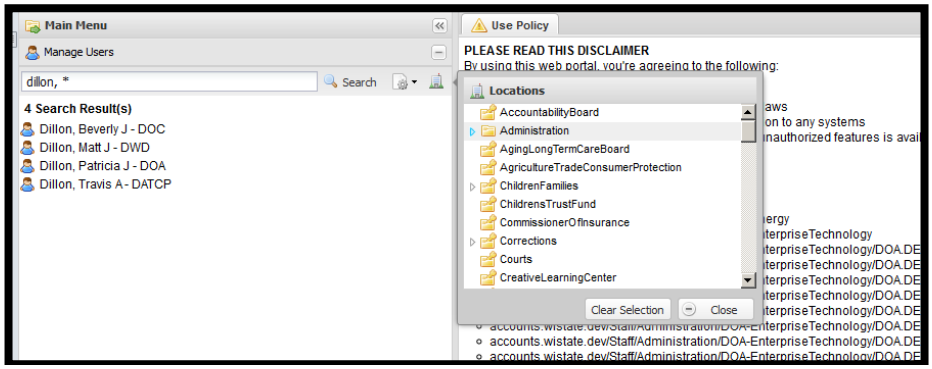
4. In the blank area before the Search button enter in the last name of the individual you are searching for followed by a ',' and a portion of the individuals first name (optional) followed by a '*'. **Note you are limited to alphanumeric, spaces, dashes, commas, periods, underscores, @, or asterisks (*)**



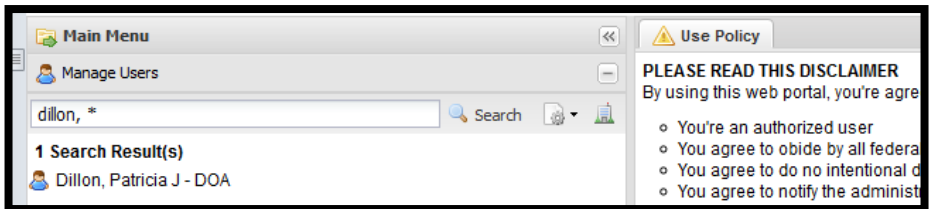
5. Press the **Search** button.



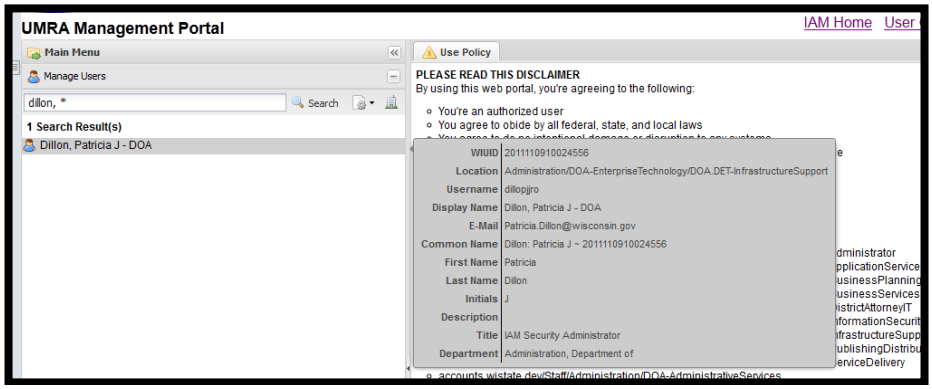
6. You can limit your search within a specific OU by pressing the little hotel icon at the end of the search line. With your mouse click on the OU you wish to restrict your search to. Holding down the **Ctrl** button on your keyboard while selecting agencies with your mouse allows you to select multiple locations. Press the **Close** button. Press the **Search** button.



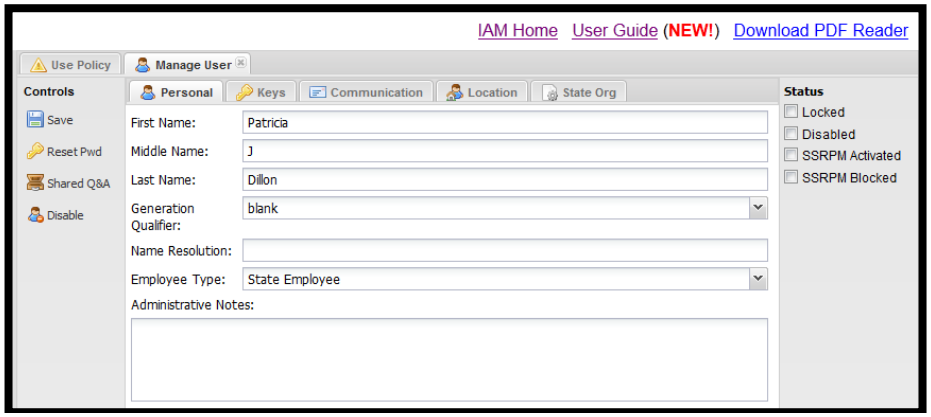
Your search results will be limited to just a specific OU and not all agencies.



7. Using your mouse you can point to a specific individual and see some of the information in their record.



8. Click on the individuals name to see their complete information.



SECTION 2. CREATE A USERID

Follow the procedure below to create a new IAM Userid in UMRA.

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

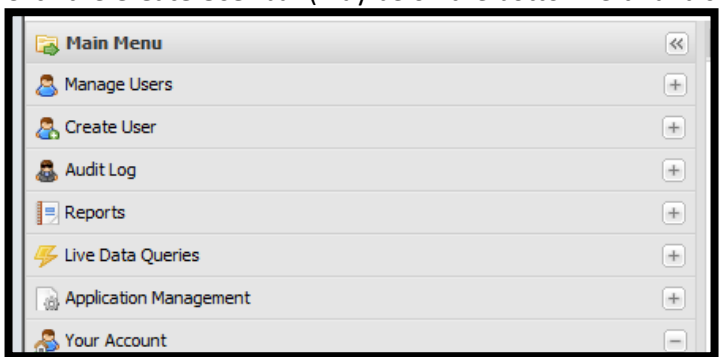
2. Perform a **Search** to make sure that your new individual does not already exist at your agency or another agency. See instructions outlined in Section 1, starting with Step 2.

Search Resul

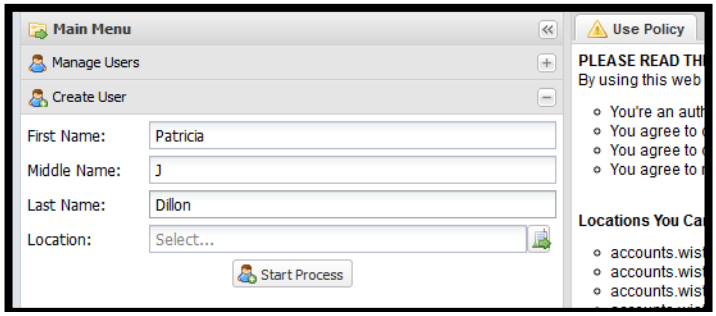
- Individual already exists at another agency: Send an Email to DET IAM Security (*DOA DL IAM Security)* to arrange a transfer (see Section 12) of their IAM Userid to your agency.
- Individual already exists in your agency: Make the necessary changes to their Userid. See Section 3 for managing a Userid and section 13 for internal transfer directions if necessary.
- Individual cannot be found: Continue with Step 3 to create the Userid required.

Creation of N

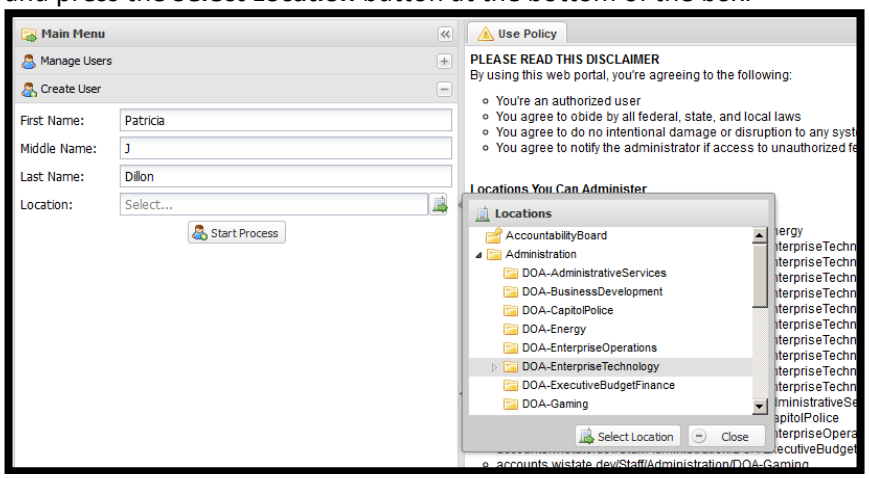
3. Click the **Create User** bar (may be on the bottom left hand side of panel.



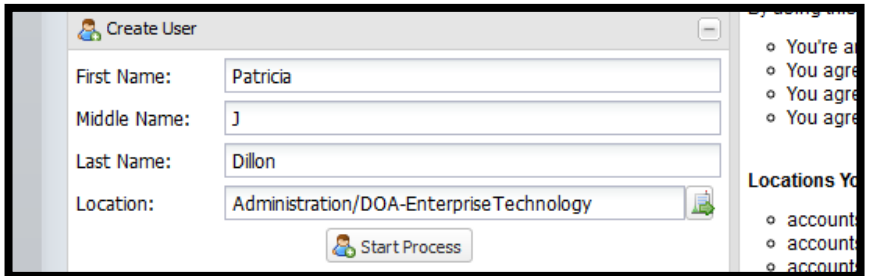
4. A drop down of 4 fields will appear. Enter in the new individual's **First Name**, a **Middle Name** (Limit 5 characters or **NMN** for no middle name), and the **Last Name**.



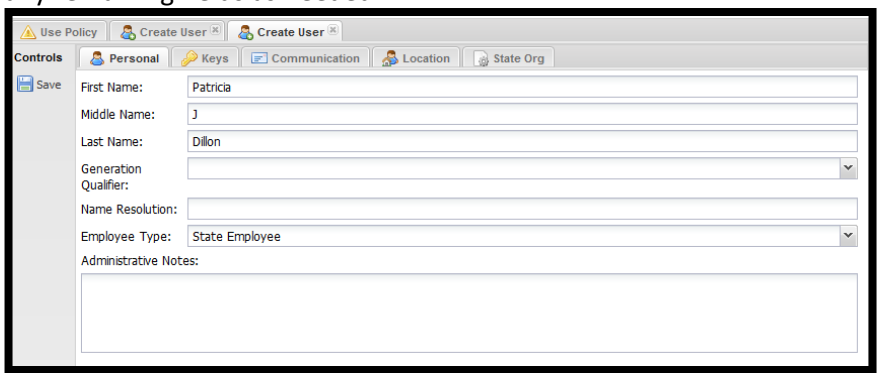
5. Press the dropdown button at the end of the Location line. You will see valid locations for a Userid to be placed in. Highlight the location with your mouse and press the **Select Location** button at the bottom of the box.



6. The location information will fill in the Location field. Press the **Start Process** button.



7. A panel with five tabs will come up on the right side of the screen. You can fill in any remaining fields as needed.

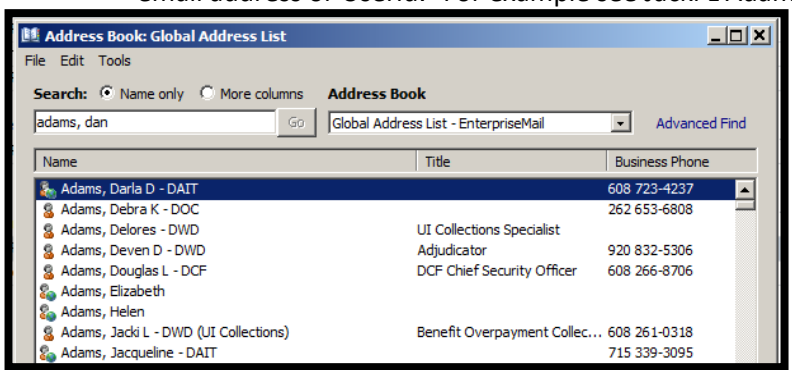


PERSONAL TAB

8. Under the Personal tab you will note a **Generation Qualifier, Name Resolution, Employee Type** and **Administrative Notes** fields.

   Generation Qualifier: values available in the dropdown affect the email address but not the Userid.

   Name Resolution: this can be a common/nickname or bureau location. It will ONLY change the display name in the Enterprise GAL but not the email address or Userid. For example see Jacki L Adams below.

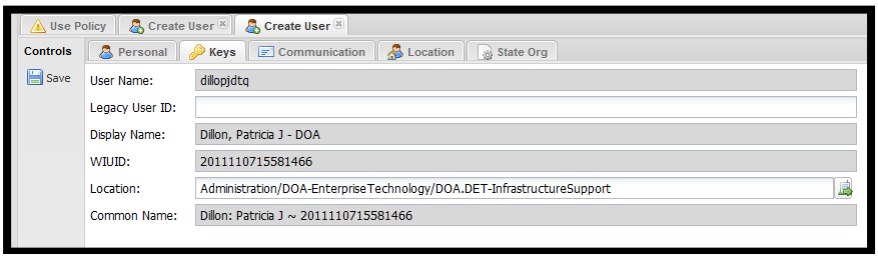


   Administrative Notes: this field is for use by agency security administrators to put in notations about changes, transfers or other information.

   Employee Type: A value of **State Employee** is the default value of this field. You can change it to any of the values available in the dropdown list.

KEYS TAB

9. Click on the **Keys** tab. The **User Name**, **Display Name**, **WIUID** and **Common Name** fields are not editable.

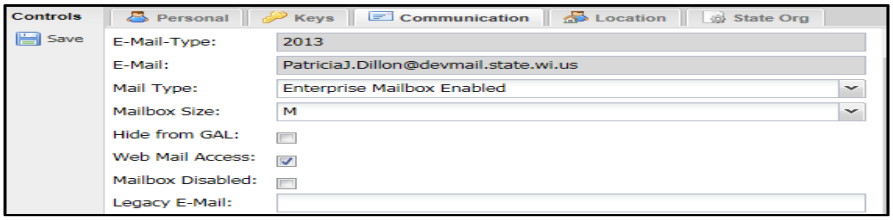


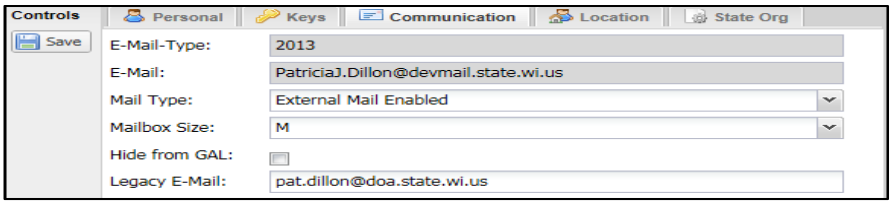
10. The **Legacy Userid** field is optional, but you can enter in the new individuals LAN account here. The **Location** field has the identical value that you entered in previously when you started the Create Userid process.

COMMUNICATION TAB

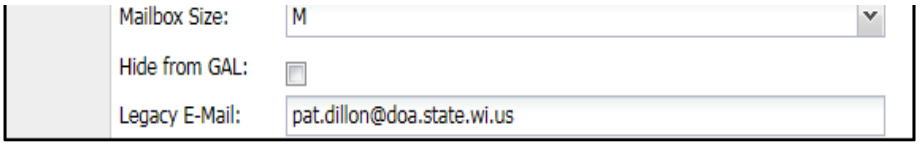
11. Click on the **Communication** tab. The **E-Mail, Mail Type, Mailbox Size and Web Mail Access** fields are automatically filled out for you with values defined for your agency. You can override all except the **E-Mail** field.
12. To override the value of **Mail Type, press the drop down button.**

    Enterprise Mailbox Enabled **is for staff using Enterprise Email.**
    External Mail Enabled **is for staff using legacy email.**
    No-Mail **is for staff with an IAM Userid, but no email account.**

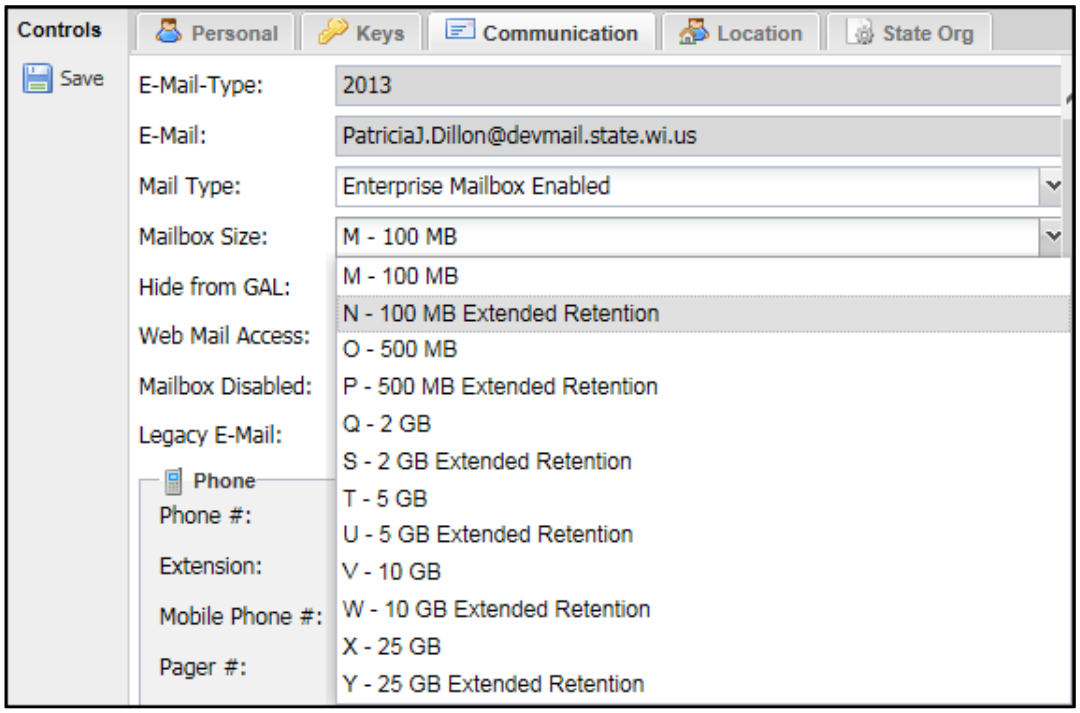




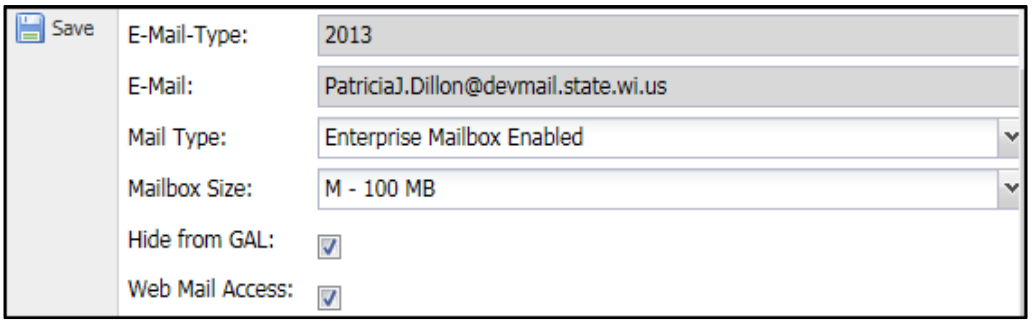
All Mail Type entries of External Mail Enable must have a Legacy email address put in the **Legacy E-Mail** field. The values entered in the Legacy E-Mail field must be unique. No two IAM Userids can have the same value in the Legacy E-Mail field.



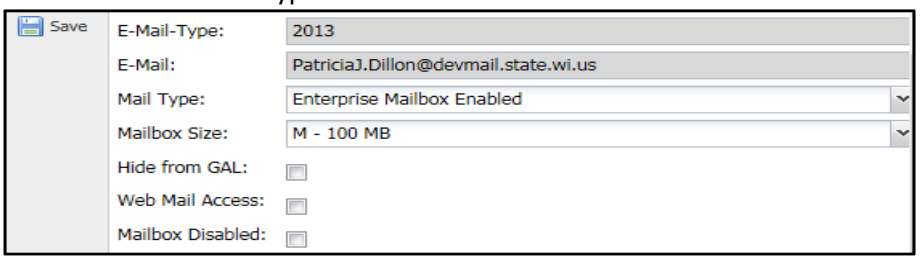
13. The **Mailbox Size** field is specific on IAM Userids that are used for Enterprise Email only. To specify a size (or class) for the **Mailbox Size** press the drop down button. Click on the mailbox size (or class) that is desired. This field will have no impact on mail types of External Mail Enabled or No Mail.



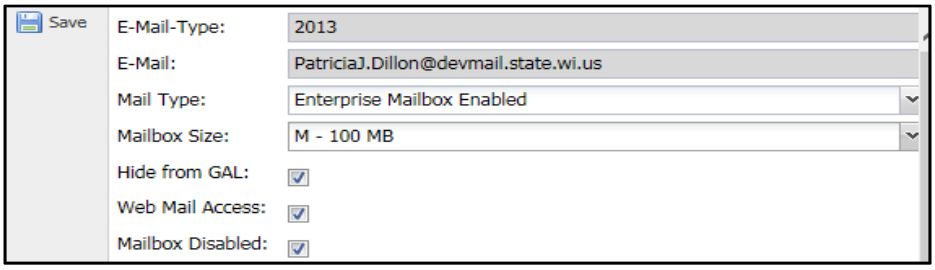
14. The default value for **Hide From GAL** is an unchecked box. You can override this by checking the box with your mouse to not to have an entry for this Email address show up in the Enterprise GAL. This field will not show if No Mail is in the Mail Type field.



15. The default value for **Web Mail Access** is normally a checked box, but this can vary from agency to agency. You can override this by unchecking the box with your mouse which prevents the Userid from being used to access Enterprise Email over the Web (Internet). This field will not show if External Mail Enabled or No Mail is in the Mail Type field.



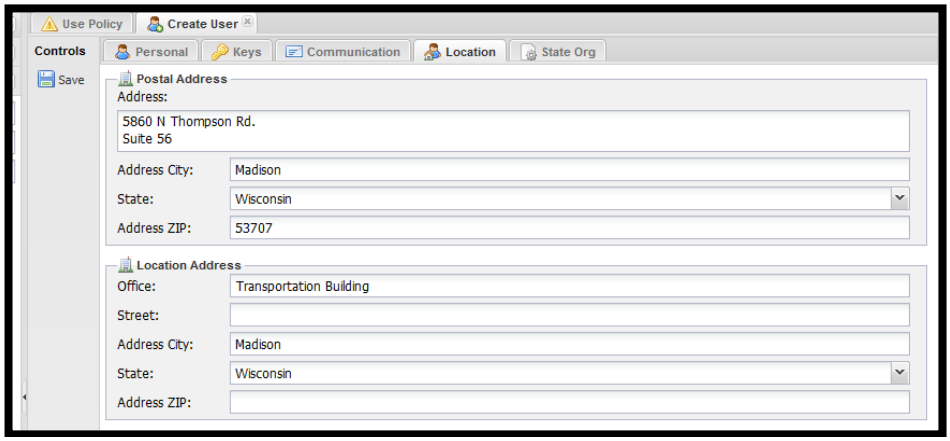
16. The default value for **Mailbox Disabled** is an unchecked box. This field will not show if External Mail Enabled or No Mail is in the Mail Type field. By checking **Mailbox Disabled** the box after **Hide from GAL** will also become checked. Mailbox Disabled will prevent this id from sending and receiving email.



17. In the lower half of the **Communication** tab you will find the **Phone** section. This section consists of the **Phone #, Extension, Mobile Phone #, Pager # Fax #** and **Assist. Phone #** fields. All these fields are optional. Each of these fields (except Extension) will expect an **nnn nnn-nnnn** format.

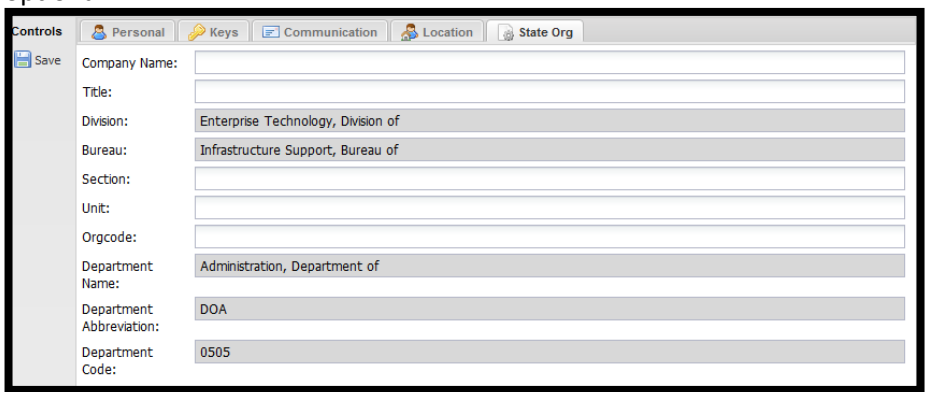
LOCATION TAB

18. Click on the **Location** tab. Two sections are under this tab (Postal Address and Location Address) and all fields in these sections are optional. The Postal Address section reflects an employee's USPS mailing address. The Location Address section reflects an employee's State Inter-d location.

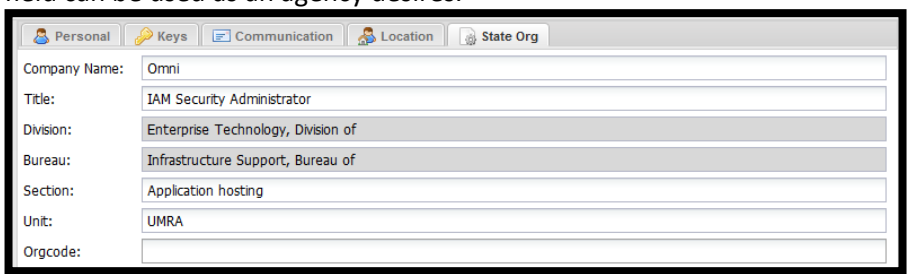


STATE ORG TAB

19. Click on the **State Org** tab. Agencies using sub OU's under their agency OU will find at least the **Division** field filled in for them. They could also see values in the **Bureau** field. Everyone will see that the **Department name, Department Abbreviation** and **Department Code** fields filled in. All remaining fields are optional.

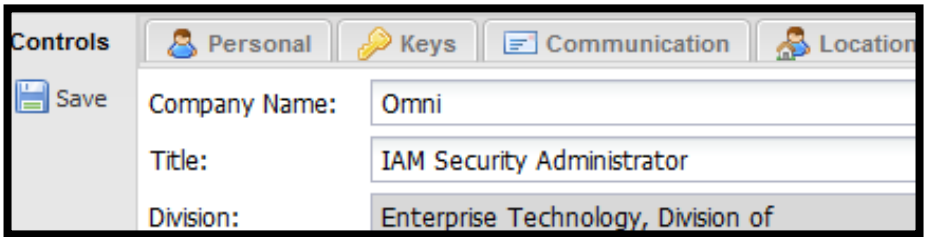


20. The **Company Name** is best used for the name of consultant firms. The **Title** field is meant to be used for position titles. The **Section** and **Unit** fields are used for further break down of the employee's location within the agency. The **Orgcode** field can be used as an agency desires.

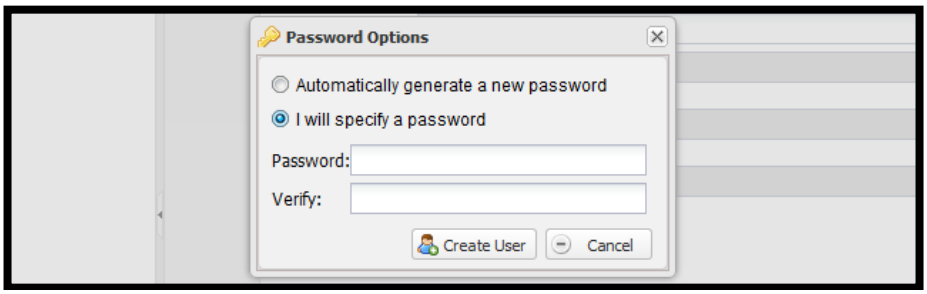


FINISHING THE NEW USERID

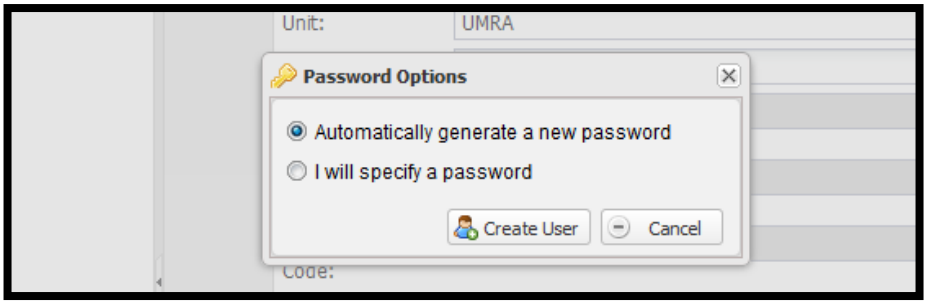
21. Press the **Save** button.



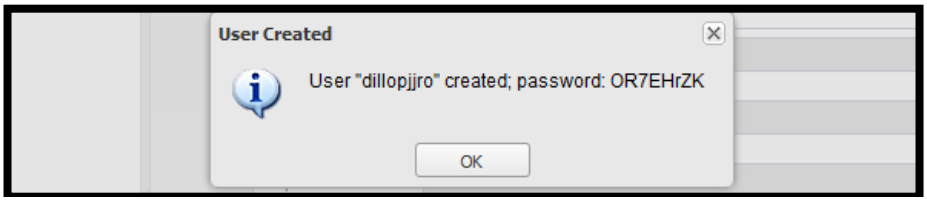
22. A **Password Options** box pops up. By default the "**I will specify a password"** option is selected. You can accept this default and enter in the initial password twice. Once in the **Password** field, and once in the **Verify** field. Press the **Create User** button.



23. By selecting the **Automatically generate a new password** option the system will generate the new password <u>and tell you in the next panel what that password is</u>. Press **the Create User** button.



24. The **User Created** box will show you the name of the Userid created along with the initial password for the Userid. Press the **OK** button.



New Userid Activation

25. Follow your agency policy and procedures to provide the owner of the new Userid their IAM Userid and initial password.

- Instruct new Userid owners to go to https://iam.wisconsin.gov to ACTIVATE their IAM Userid.
- All new Userid owners should be encouraged to review the **IAM End User Guide.**

SECTION 3. MANAGE A USER

Follow the procedure below to change a current IAM Userid in UMRA. **This section excludes password changes (covered in section 4) and internal agency Userid transfers (covered in section 13).**

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

2. Perform a **Search** to find the person you wish to make changes to. See instructions outlined in Section 1, starting with Step 2.

Manage an IAM Acoount

MODIFY PERSONAL TAB

Caution with Name Changes

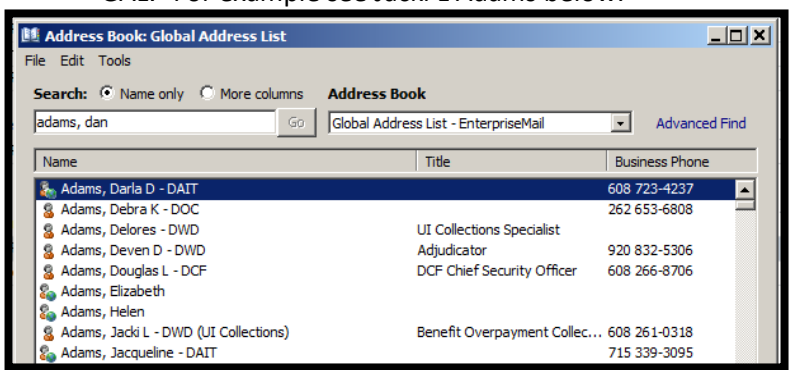
3. On the **Personal** tab you can change the **First Name**, **Middle Name and Last Name** fields. Keep in mind the following before you do though.
   a. The IAM **User Name (Userid)** will change if the first 5 characters of the **Last Name** changes, the first initial of the **First Name** changes or the first initial of the **Middle Name** (or sent to NMN) changes. **This cannot be stopped.**
   b. The **E-Mail** address will change if the **Last Name** or **First Name** of the individual is changed. The **E-Mail** address may also change if the first initial of the **Middle Name** is changed or if **NMN** is added or removed. **This cannot be stopped.**
   c. A name change that causes the **E-Mail** address to change does NOT mean that the old **E-Mail** address is available for re-assigning. The old **E-Mail** address becomes an alias for the new **E-Mail** address. This is the default action, an agency that wants the old **E-Mail** address removed as an alias, should open up a service request (SR).
   d. WARNING: Tampering with name combinations to get a preferred **E-Mail** address will give you unexpected results. You will be unhappy and your customer will surely be unhappy. Please do not do this.
   e. The password will not be impacted by an IAM **User Name (Userid)** change. The password will still be the same.

Timing consideration of Name Change

Should you make a name change that causes the email address to change it can take up to 4 hours before the individuals Exchange SMTP entries are configured correctly. Keep this in mind when doing this change and consider performing such a change during a period of time that the Userid owner is planning on not using their email.

4. On the **Personal** tab you can change the **Generation Qualifier** and the **Name Resolution fields**.

a. A **Generation Qualifier** change will impact the **Display Name, Common Name** and **E-Mail** fields.
b. A **Name Resolution** change will impact the **Display Name** and **Common Name** fields. This change will impact the display name in the Enterprise GAL. For example see Jacki L Adams below.



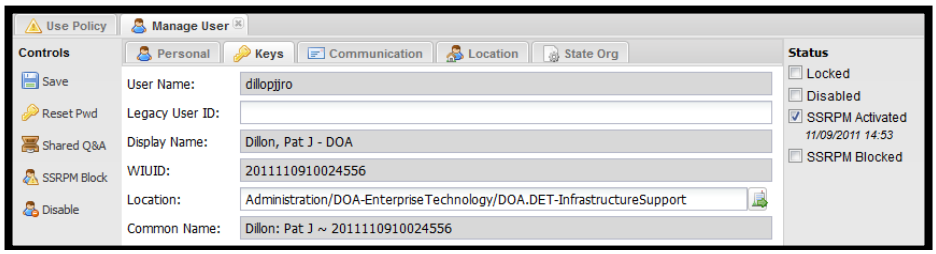
Timing consideration of Generation Qualifier Change.

A Generation Qualifier change will cause the email address to change which can take up to 4 hours before the individuals Exchange SMTP entries to be configured correctly. Keep this in mind when doing this change and consider performing such a change during a period of time that the id owner is planning on not using their email.

5. On the **Personal** tab you can change the **Employee Type** and **Administrative Notes fields**. Either change will only impact the values in the fields themselves.

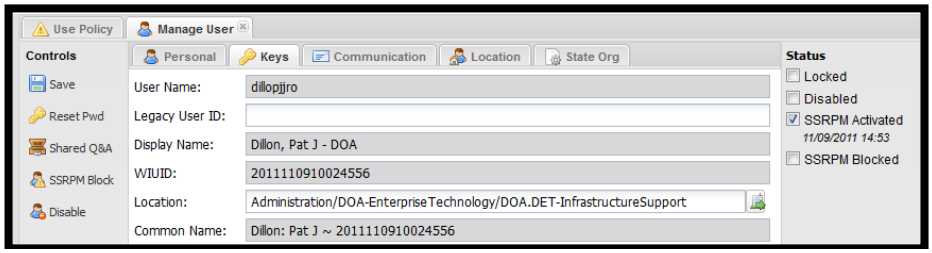
<u>MODIFY KEYS TAB</u>

6. Click on the **Keys** tab.



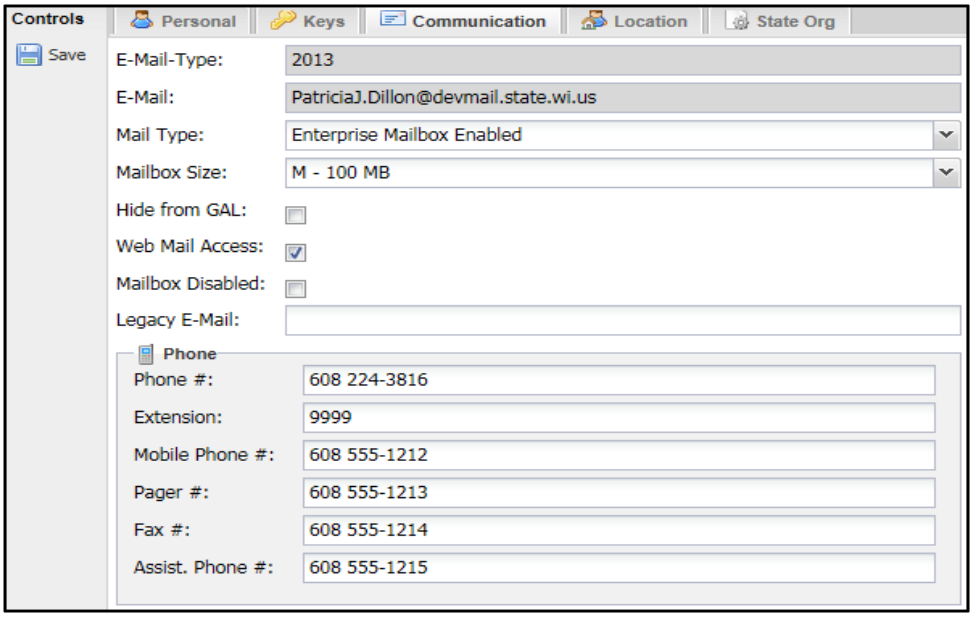
7. Under the **Keys** tab you can change the **Legacy User Id** field. This change will only impact the value in this field.

8. Under the **Keys** tab you can change the **Location** field. This can cause changes in the **Division** and **Bureau** fields under the **State Org**. Please review section 13 of this document going over agency transfers before proceeding with this type of change.

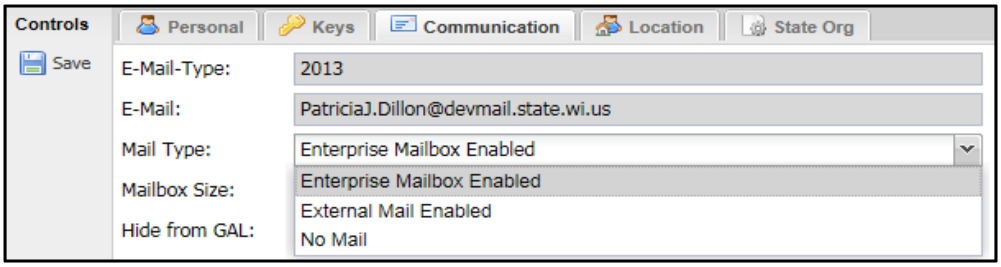


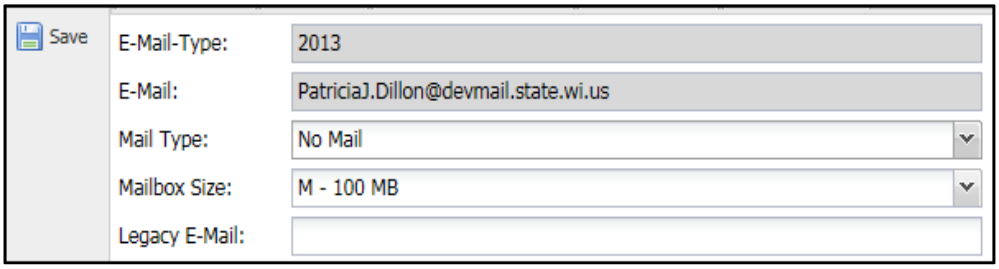
MODIFY COMMUNICATION TAB

9. Click on the **Communication** tab. The only field you cannot change on this panel is the **E-Mail Type** & **Email** fields.



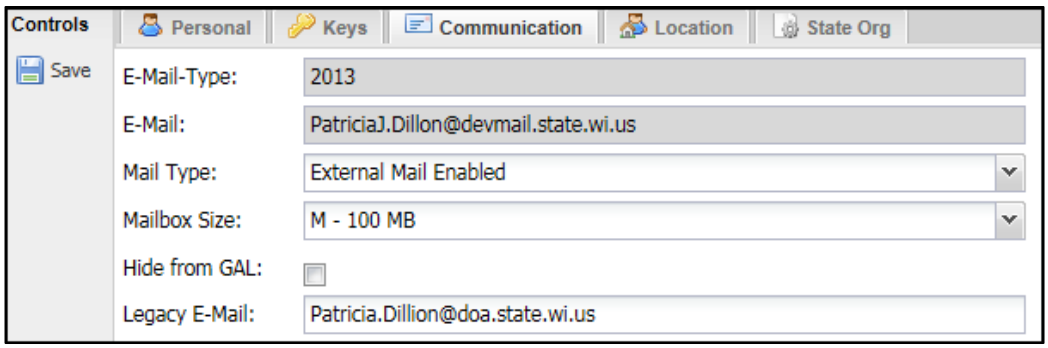
10. To override the value of **Mail Type, press the drop down button.**
    Enterprise Mailbox Enabled **is for staff using Enterprise Email.**
    External Mail Enabled **is for staff using legacy email.**
    No-Mail **is for staff with an IAM Userid, but no email account.**



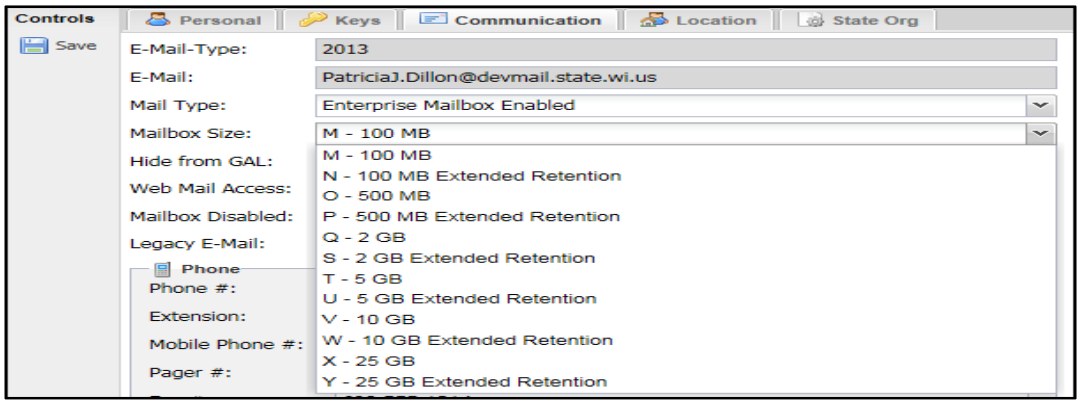


External Mail Enabled

A Mail Type value of External Mail Enable must have a Legacy email address put in the **Legacy E-Mail** field. The values entered in the Legacy E-Mail field must be unique. No two IAM Userids can have the same value in the Legacy E-Mail field. Userids that were created before the agency migrated to Enterprise Email may still have a value in the Legacy E-Mail address. It does not hurt anything.



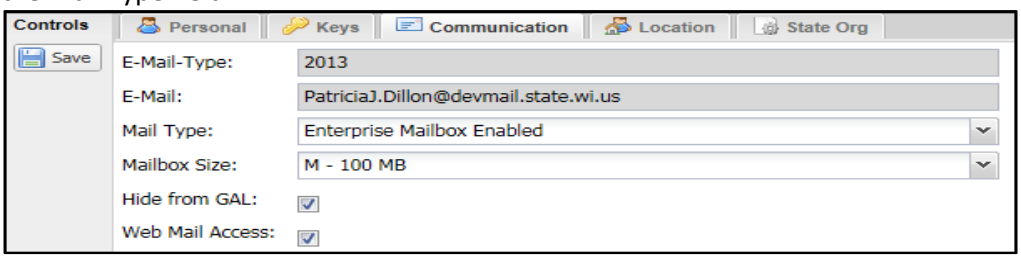
11. The **Mailbox Size** field is specific on IAM Userids that are used for Enterprise Email only. To specify a size (or class) for the **Mailbox Size** press the drop down button. Click on the mailbox size (or class) that is desired. This field will have no impact on mail types of External Mail Enabled.



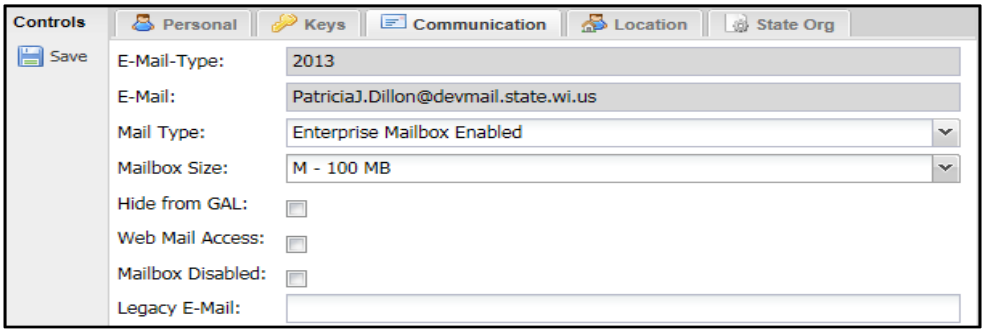
The DET Email Support team will generate the Mailbox Move Report at Noon each work day. All mailbox class size modifications must be completed before noon to be completed by the next morning, or they will not be implemented until after the following day. If you still require a mailbox move after the report has been generated, please open a Problem Ticket with the WI Enterprise Service Desk (ESD).

- Example 1 - A change made at 10 am Tuesday will be on Tuesday's Mailbox Move Report generated at noon. The change will be ready on Wednesday morning.
- Example 2 – A change made at 3 pm Monday will be on Tuesday's Mailbox Move Report generated at noon. The change will be ready on Wednesday morning.

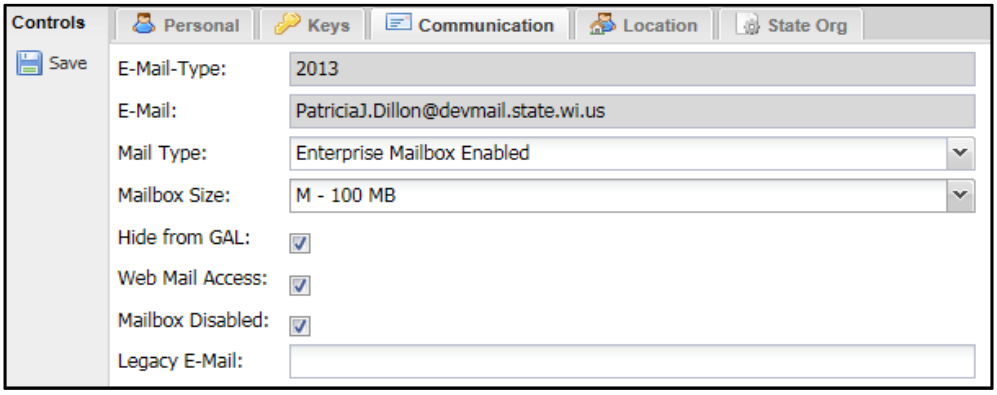
12. The default value for **Hide From GAL** is an unchecked box. You can override this by checking the box with your mouse to not to have an entry for this Email address show up in the Enterprise GAL. This field will not show if No Mail is in the Mail Type field.



13. The default value for **Web Mail Access** is normally a checked box, but this can vary from agency to agency. You can override this by unchecking the box with your mouse which prevents the Userid from being used to access Enterprise Email over the Web (Internet). This field will not show if External Mail Enabled or No Mail is in the Mail Type field.



14. The default value for **Mailbox Disabled** is an <u>unchecked</u> box. This field will not show if External Mail Enabled or No Mail is in the Mail Type field. By checking **Mailbox Disabled** the box after **Hide from GAL** will also become checked.

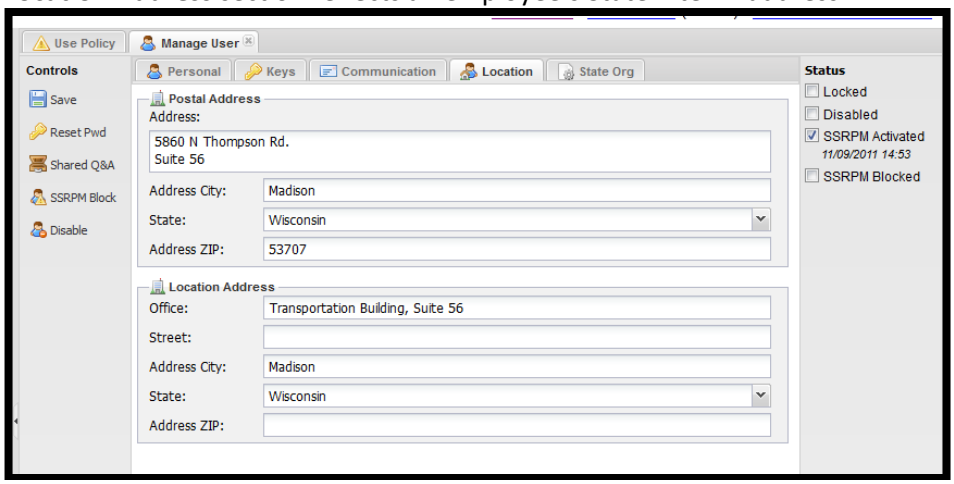


15. In the lower half of the **Communication** tab you will find the **Phone** section. This section consists of the **Phone #, Extension, Mobile Phone #, Pager # Fax #** and **Assist. Phone #** fields. All these fields are <u>optional.</u> Each of these fields (except Extension) will expect an **nnn nnn-nnnn** format.

<u>MODIFY LOCATION TAB</u>

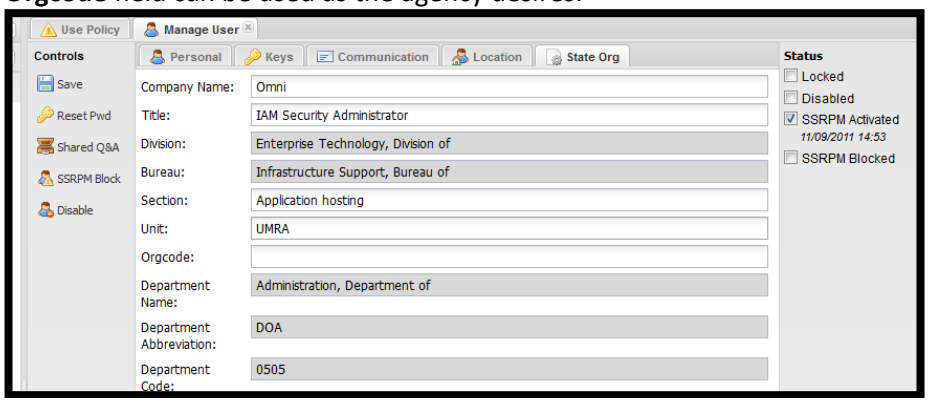
16. Click on the **Location** tab. Two sections are under this tab (**Postal Address** and **Location Address**) and all fields in these sections are optional.

17. The **Postal Address** section reflects an employee's USPS mailing address. The **Location Address** section reflects an employee's State Inter-D address.

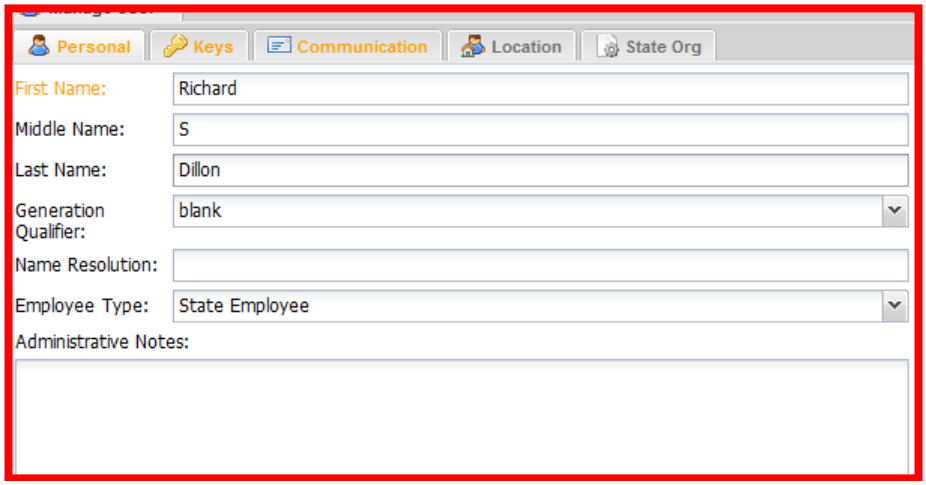


MODIFY THE STATE ORG TAB

18. Click on the **State Org** tab. Agencies using sub OU's under their agency OU will find at least the **Division** field filled in for them. They could also see values in the **Bureau** field. These fields are locked if the field is shaded and cannot be edited by the security administrator. These fields are propagated as a result of the value in the **LOCATION** field under the **Keys** tab.
19. On the **State** Org tab everyone will see that the **Department Name, Department Abbreviation** and **Department Code** fields filled in. You will also notice that these fields are shaded and cannot be edited by the security administrator.
20. The **Company Name** is best used for the name of a consultant firm. The **Title** field is meant to be used for position titles. The **Section** and **Unit** fields are used for further break down of the employee's location within the agency. The **Orgcode** field can be used as the agency desires.



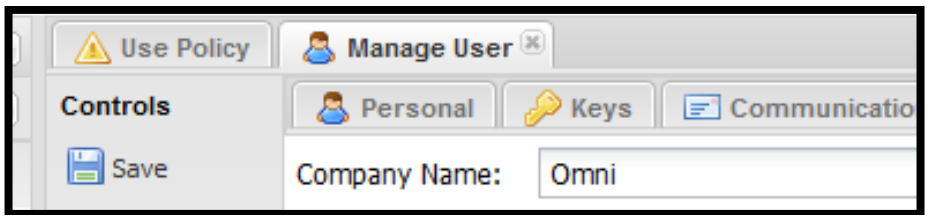
As you make changes to the Userid record you will see that the titles of the fields that are modified change color. You will also notice that tabs that have fields that are modified on them also change colors.



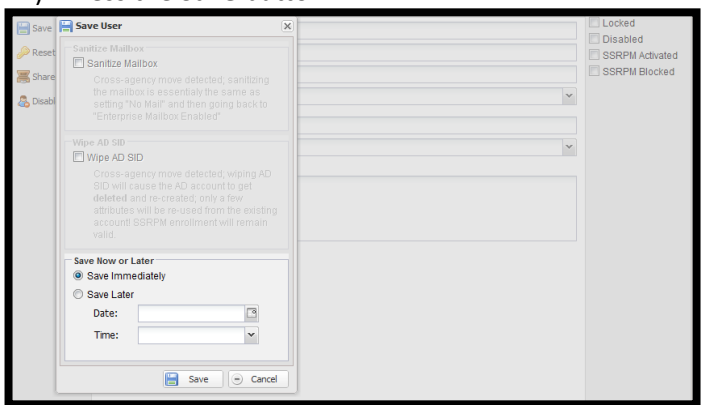
In the example above I have changed the **First Name** from 'Dick' to 'Richard'. Note that the field name of **First Name** has changed from black to **yellow**. Also notice the color of the tabs of **Personal, Keys** and **Communications** has changed from black to **yellow.**

SAVE THE MODIFICATIONS

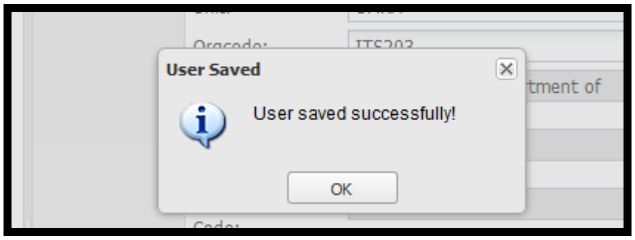
21. Press the **Save** button under the **Controls** column.



22. A **Save User** box pops up giving you the option to **Save Immediately** (by default) or to schedule the change for a **Save Later** date and time (reviewed in section 11). Press the **Save** button.



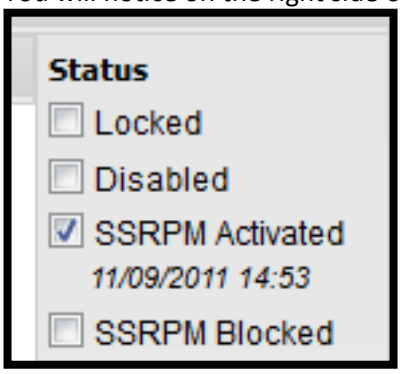
23. A **User Saved** box comes up stating '**User saved successfully!**' Press the **OK** button.



24. **To view your change close all tabs related to this Userid. Repeat the search steps to find this Userid (a new pull) and then select the Userid from the new pull.**

Status Column

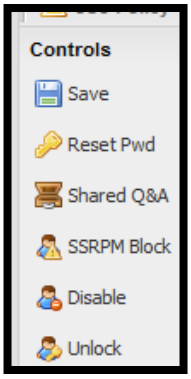
You will notice on the right side of the panel a **Status** column.



- A check in the box before **Locked** means that the Userid is password suspended (too many invalid password attempts). The owner can no longer sign on using this Userid.
- A check in the box before **Disabled** means that the Userid has been disabled by an agency IAM Security Administrator or has been disabled because of lack of use (no Userid usage for over 6 months).
- A check in the box before **SSRPM Activated** means that the Userid has successfully gone through the Account Activation process (via SSRPM). You will also notice the date and time that the owner last made changes to their Challenge Response questions or their Shared Secret question.
- A check in the box before **SSRPM Blocked** means that the Userid made more than 4 invalid attempts to recovery their password using Account Recovery (via SSRPM) within a 20 minute period. The Userid can no longer use Account Recovery to recover their Userid and an agency IAM Security Administrator must assign the Userid a new password.

Control Column

You will notice in the middle of the screen a column with the title of **Controls**.



- **SAVE:** Save changes you have made to a Userid.
- **Reset Pwd:** Reset the password on the Userid. The password reset process is outlined in Section 4 of this guide.
- **Shared Q&A:** See owner's shared secret question/answer. A box will come up with this information. You will use this information as part of the password reset process that is outlined in Section 4 of this guide.
- **SSRPM Block:** Disable a Userids ability to use IAM Self Care (SSRPM)**.** See Section 5 for more information.
- **Disable:** Prevent a Userid from being used to sign on to an application. A disabled Userid can only be Enabled by an agency security administrator. See Section 5 for more information.
- **Enable:** Allow a Userid that is Disabled to be used (with no password change made). See Section 5 for more information.
- **Unlock:** Allow a Userid that is **Locked** to be used (with no password change made). . See Section 5 for more information.

SECTION 4. PROCEDURE FOR CHANGING A PASSWORD

Follow the procedure below to change the password of a current IAM Userid using UMRA.

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

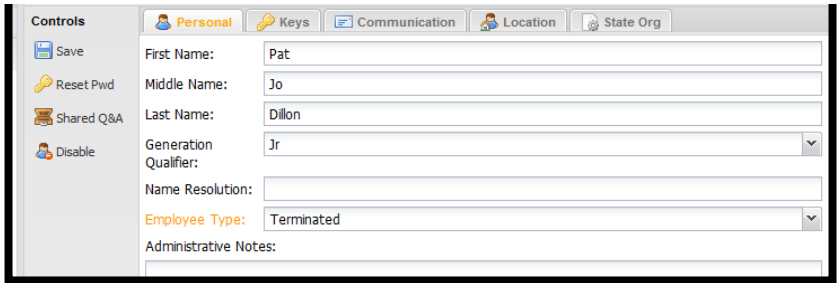
2. Perform a **Search** to find the person you wish to change their password. See instructions outlined in Section 1, starting with Step 2.

Account Recovery?

The process below should be followed in the situations that the customer has already attempted and failed Account Recovery (see the IAM End User Guide for instructions). Walk your customer through Account Recovery in SSRPM if they have not attempted already.

Check this out

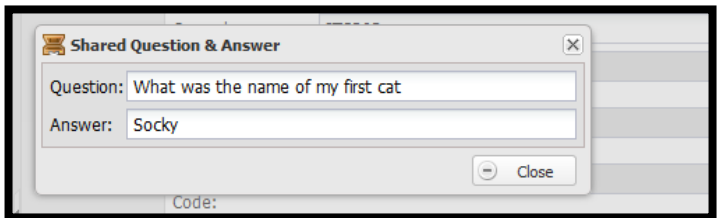
Do not go any further when the Employee Type field value is TERMINATED until you determine first if this employee is still working for you.



Start the Password Change Process

CONFIRM IDENTITY

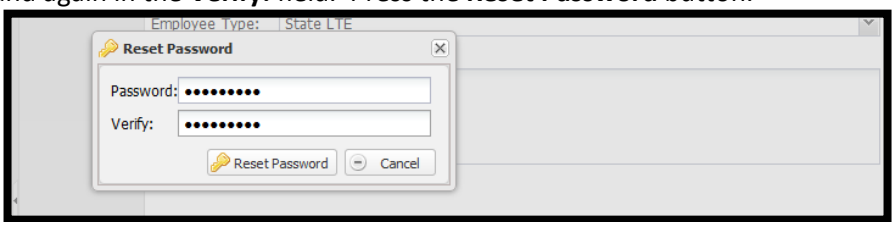
3. Press on the **Shared Q&A** button under the **Controls** column in the middle of the screen to see Userid owner's Shared Secret Question & Answer. Ask the caller to confirm the answer to their Shared Secret Question/Answer. Press the **CLOSE** button. **Follow your agency procedures for caller verification if the caller cannot answer their Shared Secret.**



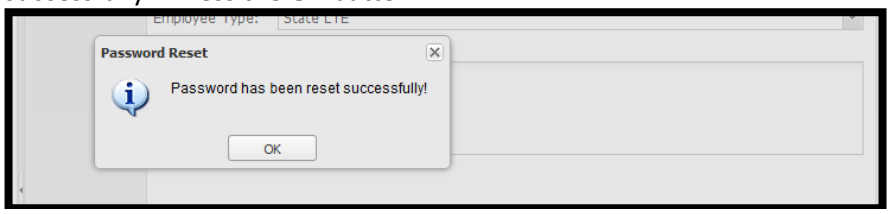
An IAM Userid that does NOT have a Shared Secret Question & Answer has NOT completed IAM Account Activation. The Userid owner MUST complete their Account Activation. Follow your agency procedures in this situation.

CHANGE PASSWORD

4. Press the **Reset Pwd** button under the **Control** column. A '**Reset Password'** will appear. Enter in a new password identically 2 times, once in the **Password:** field and again in the **Verify:** field. Press the **Reset Password** button.



5. A '**Password Reset'** box will come up saying 'Password has been reset successfully'. Press the **OK** button.



PASSWORD REQUIREMENTS

The IAM technical implementation enforces these requirements:

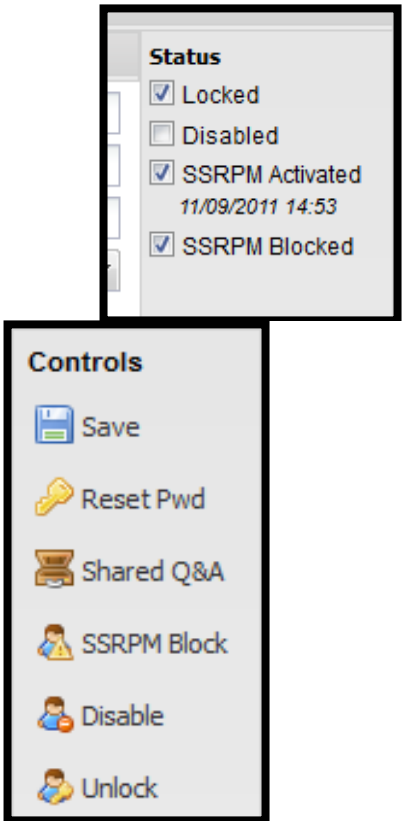
- The last 8 passwords cannot be reused.
- Passwords must be changed every **60 days**.
- Passwords must be 7–20 characters in length.
- Passwords must contains at least three of the following categories of characters:
  - Uppercase letters (ABC…)
  - Lowercase letters (abc…)
  - Numerals 0 to 9
  - Symbols found on the keyboard
- Passwords may not include your user ID or department abbreviation.
- Passwords cannot match your first name, middle name or last name (3 characters or greater).

System administrators, security administrators, or agency IAM password changers are requested to manually and voluntarily follow the following password change requirement

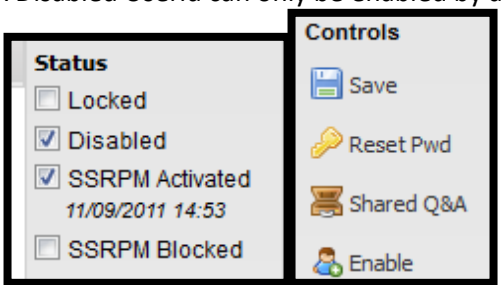
- Passwords must be changed every **30 days**.

HANDLING LOCKED AND DISABLED USERIDS

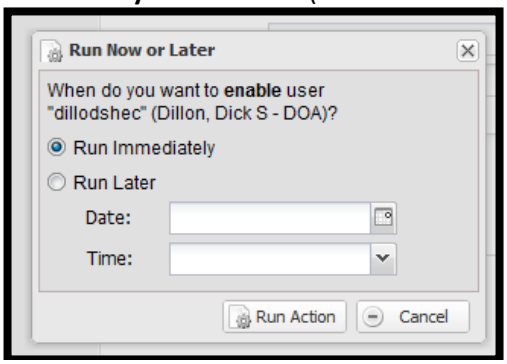
6. Changing a password will automatically UNLOCK a Userid that is **Locked** and UNBLOCK a Userid that is **SSRPM Blocked**. Using the **Unlock** button under the **Controls** column will **UNLOCK** a userid that is **Locked** and not change the current password. This can be done by both an agency security administrator and a password changer.



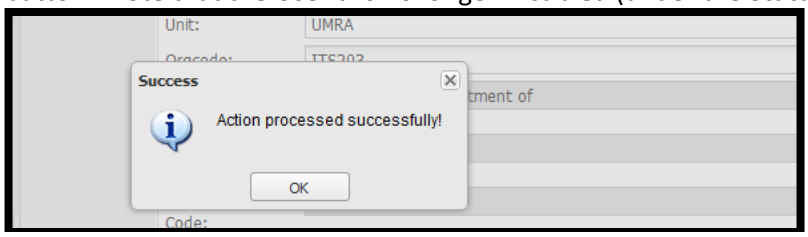
7. Changing a password <u>will not</u> automatically Enable a Userid that is **Disabled**. To enable a Userid you press the **Enable** button that is under the **Controls** column. A Disabled Userid can only be enabled by an agency security administrator.



8. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (review in Section 11). Press the **Run Action** button.



9. A **Success** box will appear saying 'Action processed successfully!' Press the **OK** button. Note that the Userid is no longer **Disabled** (under the **Status** column).



What Userid Owners Should Do After a Password Change

- Instruct Userid owners to change their password after an agency security administrator or password changer has done it for them.
- Instruct Userid owners to recreate their Challenge/Response questions via Account Management. For these instructions go to the IAM End Users Guide.

SECTION 5. "LOCKED" VERSUS "BLOCKED" VERSUS "DISABLED"

Disable (step 3) / Enable (step 13): A Userid that is **disabled** can only be **enabled** by an agency security officer, not a password changer. A Userid can become **disabled** by:

(1) an agency security officer manually pressing the disabled button in the Userid record. Disabling an IAM Userid may be necessary when staff are on leave of absence, extended sick leave, or at the request of management.
(2) the weekly inactivity (stale) report showing the Userid has not been used in over 6 months.

SSRPM Block (step 19): A **blocked** Userid is caused by more than 4 unsuccessful attempts within a 20 minute period to recover a password using the IAM Home page. An unsuccessful attempt is caused by invalid answers to the Userid owner's **Challenge Response** questions. An agency security officer can manually block a Userid as well. There are 2 ways to remove a block.

(1) A password change by an agency security officer will remove the **block**.
(2) A password change by an agency password changer will remove the **block**.

Lock / Unlock (step 22): A **locked** Userid is caused by more than 4 invalid password attempts within a 20 minute period. A Userid that has become **locked** can be:

(1) **unlocked** by an agency security officer with or without a password change.
(2) **unlocked** by an agency password changer with or without a password change.
(3) **unlocked** by the Userid owner using IAM Home to select **Unlock Account** (without a password change) or **Account Recovery** (with a password change).

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

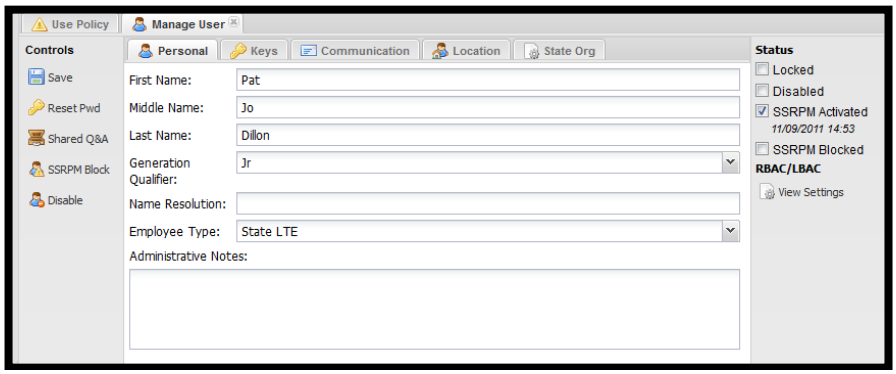
2. Perform a **Search** to find the person you wish to work with. See instructions outlined in Section 1, starting with Step 2.

STOP

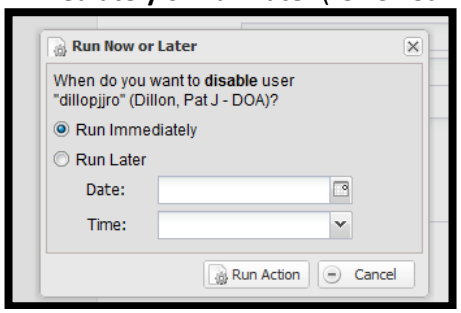
You may not do the following to a Userid that is located under another agency OU that you are not authorized for.

Disable a Userid

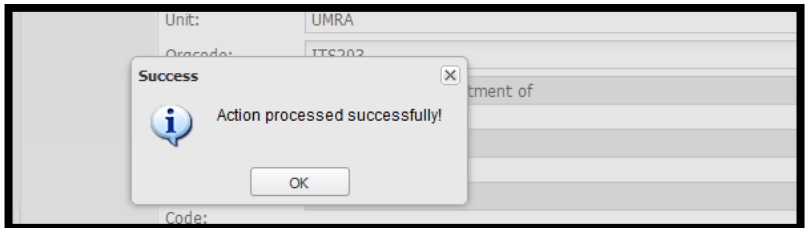
3. Press the **Disable** button on the **Controls** column to disable and active IAM Userid. Keep in mind, only an agency security administrator can enable the Userid.



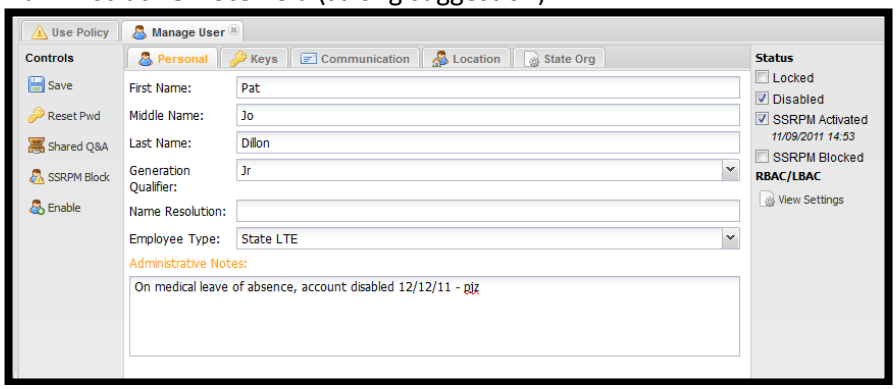
4. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (reviewed in Section 11). Press the **Run Action** button.



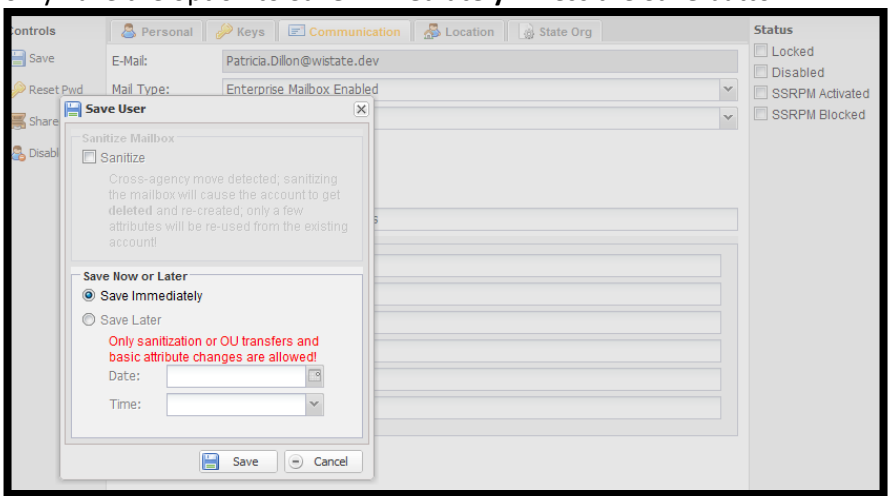
5. A **Success** box will appear saying 'Action processed successfully!' Press the **OK** button.



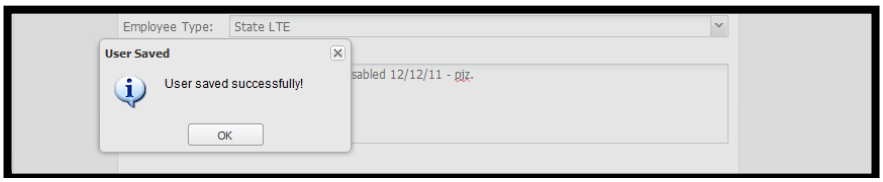
6. Under the **Personal** tab, put a notation, change date, and initials in the **Administrative Note** field (strong suggestion).



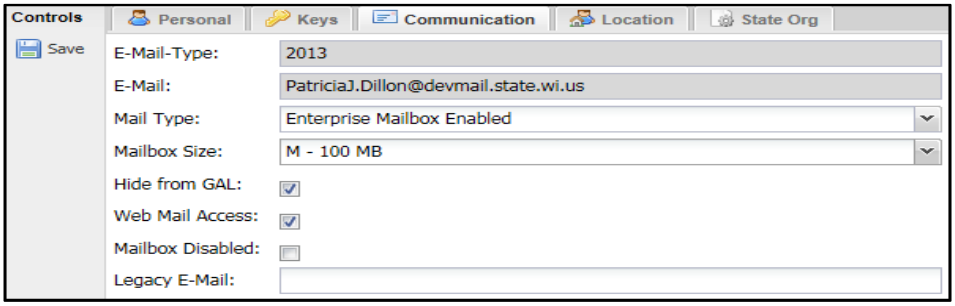
7. Press the **SAVE** button. A **Save User / Save Now or Later** box will come up. You only have the option to **Save Immediately**. Press the **Save** button.



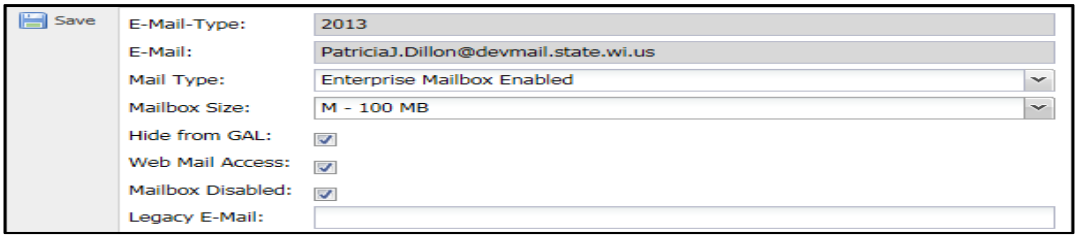
8. A **User Saved** box will come up saying 'user saved successfully!' Press the **OK** box.



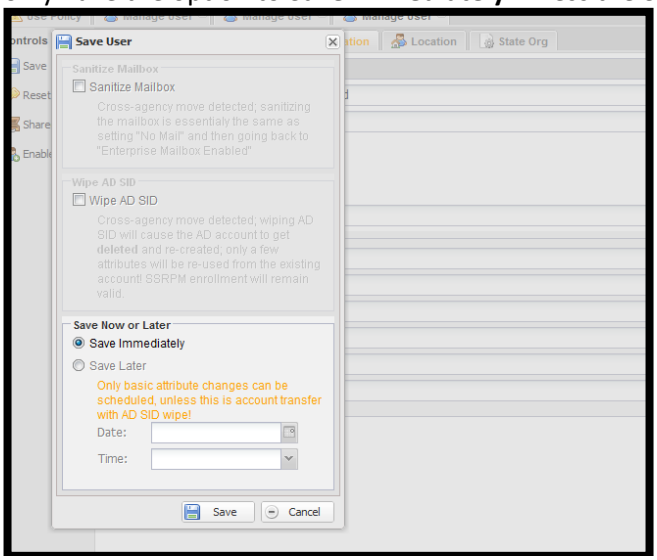
9. Under the **Communication** tab, customers using **Mail Type** *Enterprise Mailbox Enabled* or *External Mail Enabled* can check the box after **Hide from GAL.** This will prevent an entry for this mailbox showing the in the Enterprise Exchange GAL while the Userid is in a disabled state.



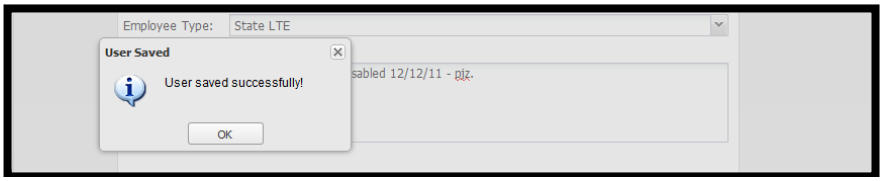
10. Customers that are using **<u>Enterprise Email</u>** can disable the mailbox to keep it from receiving or sending email. This can be done by clicking the box after **Mailbox Disabled**.



11. Press the **SAVE** button. A **Save User / Save Now or Later** box will come up. You only have the option to **Save Immediately**. Press the **Save** button.

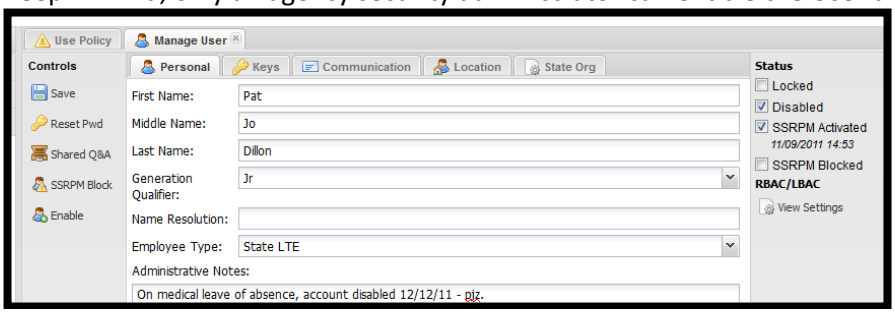


12. A **User Saved** box will come up saying 'user saved successfully!' Press the **OK** box.

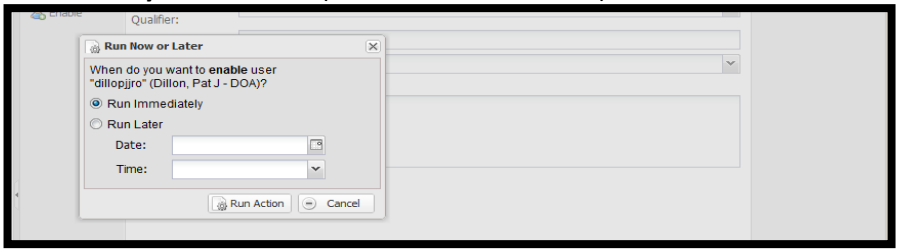


Enable a Userid

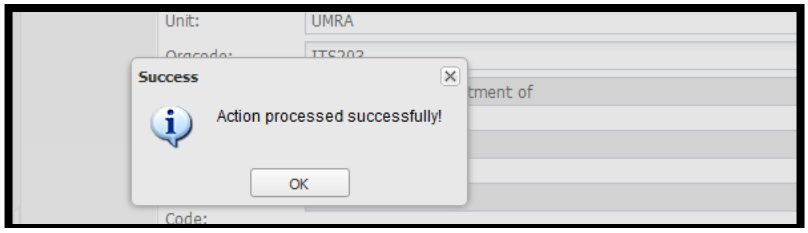
13. Press the **Enable** button on the **Controls** column to enable a disabled IAM Userid. Keep in mind, only an agency security administrator can enable the Userid.



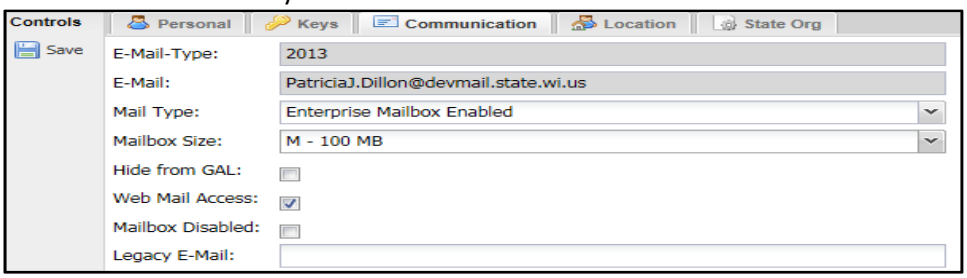
14. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (reviewed in Section 11). Press the **Run Action** button.



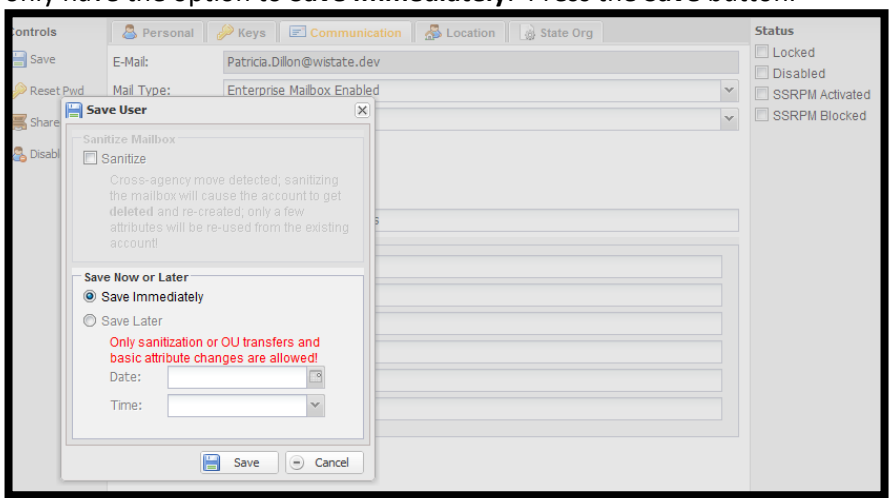
15. A **Success** box will appear saying 'Action processed successfully!' Press the **OK** button.



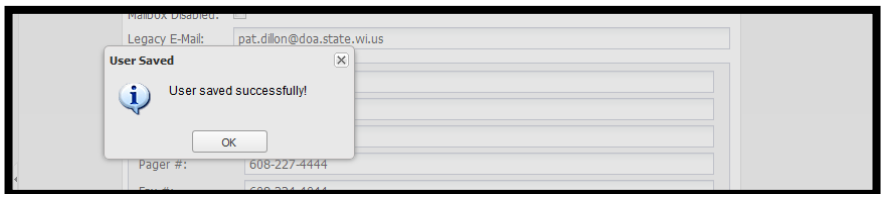
16. Go to the **Communication** tab. Uncheck the boxes after **Hide from GAL** and **Mailbox Disabled** if they are checked.



17. Press the **SAVE** button. A **Save User / Save Now or Later** box will come up. You only have the option to **Save Immediately**. Press the **Save** button.

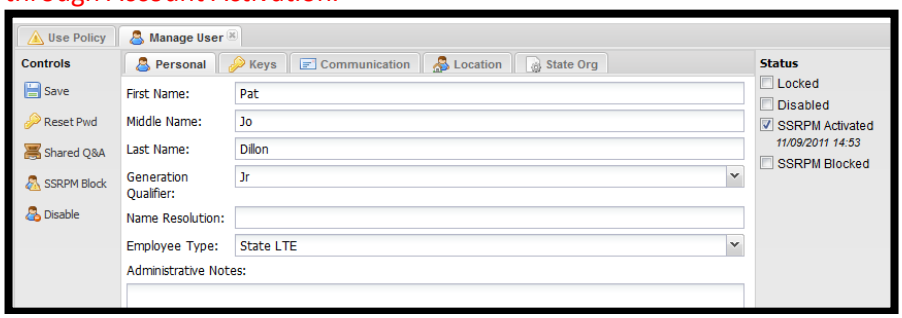


18. A **User Saved** box will come up saying 'User saved successfully!' Press the **OK** box.

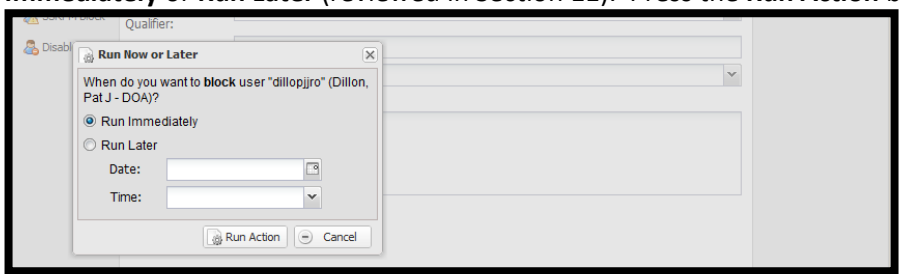


SSRPM Block

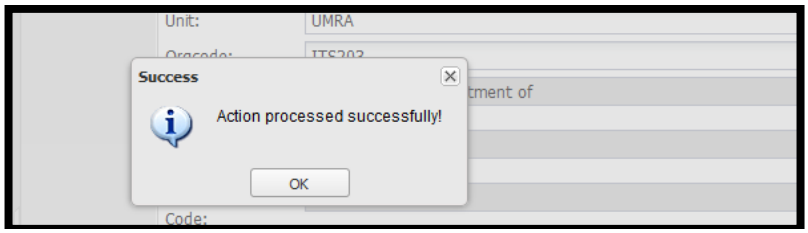
19. To keep a Userid from using the IAM Home page press the **SSRPM Block** button. NOTE: This button will not show if the Userid you are looking at has never gone through Account Activation.



20. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (reviewed in Section 11). Press the **Run Action** button.

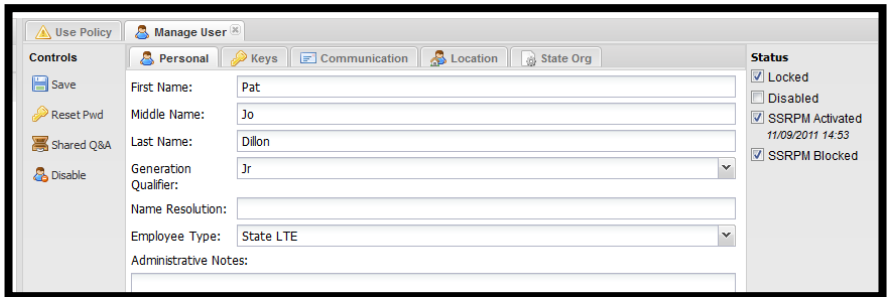


21. A **Success** box will appear saying 'Action processed successfully!' Press the **OK** button.

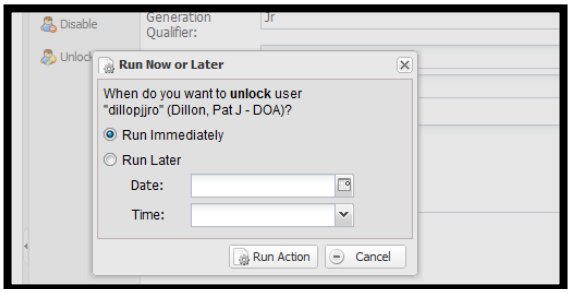


Unlock a Userid

22. Press the **Unlock** button on the **Controls** column to unlock a **Locked** IAM Userid.



23. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (reviewed in Section 11). Press the **Run Action** button.



24. A **Success** box will appear saying 'Action processed successfully!' Press the **OK** button.

SECTION 6. DELETING A USERID

Follow these instructions to properly delete an IAM Userid. Please read through this section in its entirety before starting the delete process.

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

2. Perform a **Search** to find the person you wish to work with. See instructions outlined in Section 1, starting with Step 2.

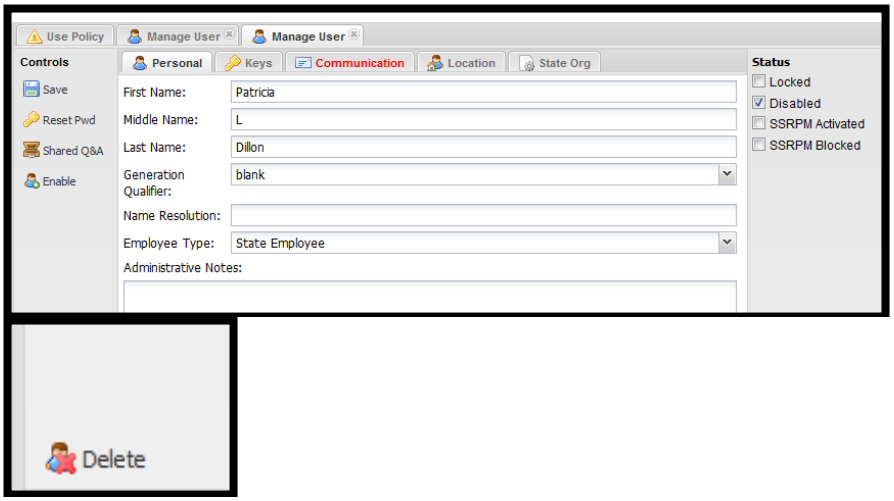
Search Results Decision Point

- You may not proceed with a delete if the individual's Userid is located under another agency OU.
- You may disable the Userid **(**follow direction in Section 5, starting with step 3) if you locate the individual under one of your agencies OU's and you wish to only disable the Userid until you are actually ready to delete the Userid. Agencies that have migrated to Enterprise Email must work with their agency Delegated Exchange Administrator to make all necessary copies of the mailbox belonging to the individual that is being deleted. **This must be completed before the UMRA account is deleted**.

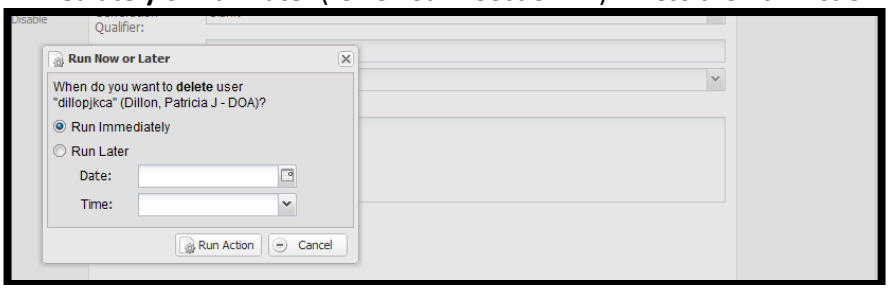
- You may proceed to **Delete a Userid** below if you locate the individual under one of your agencies OU's and you are ready to delete the Userid from UMRA immediately.

Delete a Userid

3. Press the **Delete** button on the bottom of the **Controls** column to delete an IAM Userid.



4. The **Run Now or Later** box will come up. You have the option to **Run Immediately** or **Run Later** (reviewed in Section 11). Press the **Run Action** button.



5. A **Success** box comes up saying "Action processed successfully!" Press the **OK** button.

6. The account is now gone. In the case of an '**OH NO'** moment open an SR for the DET AD team to request that the account be restored from the last backup. Also, the DET Email Team will have to be involved to recover the Enterprise Mailbox if necessary.

SECTION 7. CREATING SECONDARY IAM ACCOUNTS (USERIDS)

Secondary IAM Accounts (Userid) will be created by the appropriate agency IAM Security Administrator and will reside under the agencies OU or a sub-OU. The agency IAM Security Administrator will continue to maintain the Userid through the life of the Userid. DET IAM Security will not maintain or reset passwords for the Secondary IAM Accounts (Userids) belonging to a customer agency (unless there is an agreement in place).

A secondary IAM account (Userid) is created for someone that has special privileges in an application that would interfere with the workings of their primary IAM Userid. An example of such a situation that requires a secondary IAM account (Userid) is for Agency Email Administrators requiring Delegated Exchange Administration Rights.

Sign On To Production UMRA

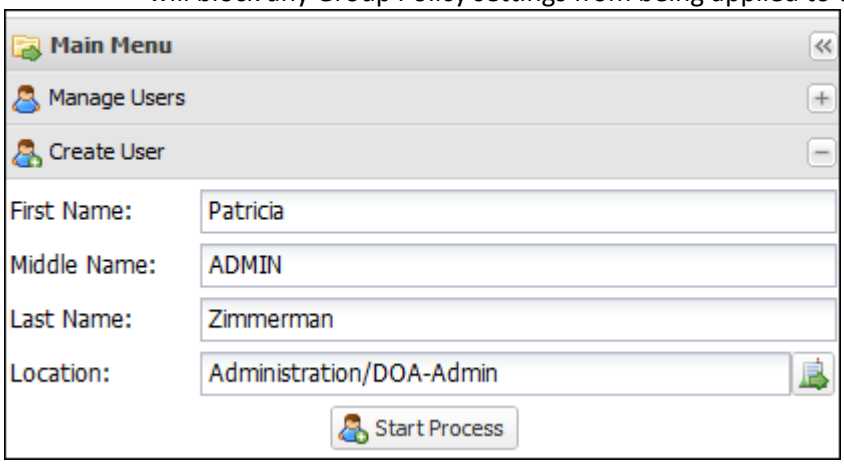
1. See instructions outlined in Section 1, Step 1.

Search For an Existing IAM Userid

2. Perform a **Search** to confirm that the individual down not already have a Secondary IAM Account (Userid). See instructions outlined in Section 1, starting with Step 2.

Create Secondary IAM Account (Userid)

3. Follow the Create Userid directions outlined in Section 2 starting at step 3. When creating the new Userid, there are two things to remember:
    a. The **Middle Name** field should have the value of **Admin**. This will identify Userid that as a Secondary IAM Account (Userid).
    b. The ID must be created in the **Admin** container for your agency. This will block any Group Policy settings from being applied to the Userid.



Should there be two individuals with the same first and last name, each requiring a Secondary IAM Account (Userid), add their true middle initial after their first name (example: Joe P, Joe J).

Special Issues

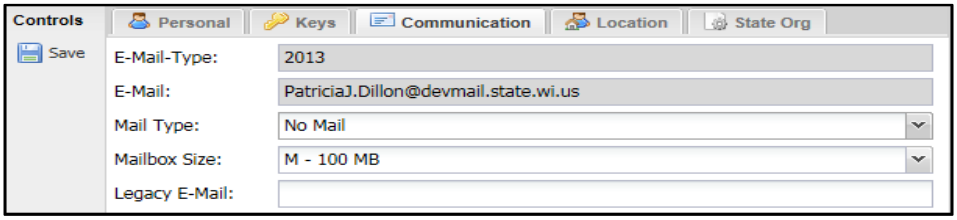
- Should the individual already have a Secondary IAM account (Userid) at another agency **(a secondary IAM account (Userid) can be identified by the term 'admin' in the middle name field)** contact DET IAM Security for assistance.

- Should the individual already have a Secondary IAM account (Userid) within your agency and it is used for Delegated Exchange Administration but not working correctly, contact DET IAM Security for assistance.

Additional Userid Specifications

c. On the **Personal** tab enter **'Secondary IAM Account'** in the **Administrative Notes:** field.

d. On the **Communication** tab the **Mail Type** should be set to **No Mail**.



e. There is nothing else special about any of the other fields and they can be filled out as your agency policies dictate. Go ahead and **SAVE** the Userid when you are done.

f. Provide the owner with their Secondary IAM Account (Userid) and initial password.

g. The owner will have to activate this Userid like they did their primary IAM Userid.

h. The password for a Secondary IAM Account (Userid) will expire every 60 days. Where this Userid does not have an associated Email account, it will not be receiving warning emails as the password expiration date draws near. For this reason, it is recommended that the owner change the password of the Secondary IAM Account (Userid) at the same time that they change the password of their Primary IAM Userid.

Adding Production Delegated Exchange rights to a Production Secondary IAM Account (Userid)

i. After an agency IAM Security Administrator creates a Secondary IAM account (Userid) for Delegated Exchange Admin purposes, follow the directions outlined in **Section 14** for requesting a new agency Delegated Exchange Administrator.

Adding UAT Delegated Exchange rights to a UAT Secondary IAM Account (Userid)

j. After the agency IAM Security Administrator creates a Secondary IAM account (Userid) in UAT for UAT Delegated Exchange Admin purposes, they should open up a Service Request (SR). State that this Secondary IAM account (Userid) needs to be added as a UAT Delegated Exchange Administrator for the agency. Also state in the SR that it be assigned to the Infrastructure Tools AD team.

SECTION 8. AUDIT LOG

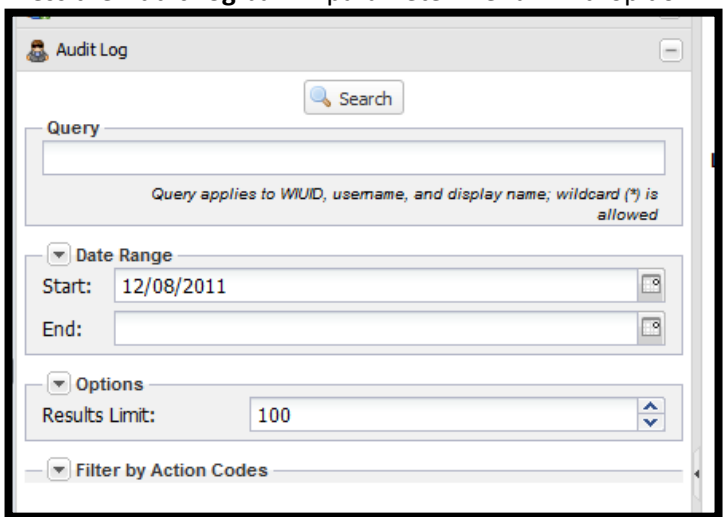
Although you receive immediate confirmation in UMRA on any Userid creation or modification, change, you can review all security changes made through UMRA or SSRPM (IAM Home page).

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

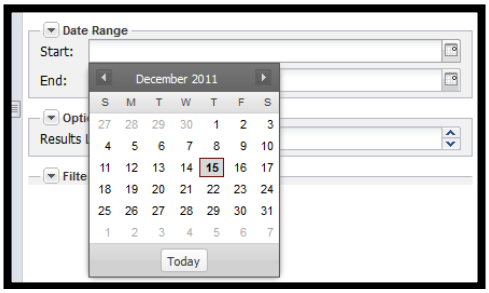
Set Audit Listing Parameters

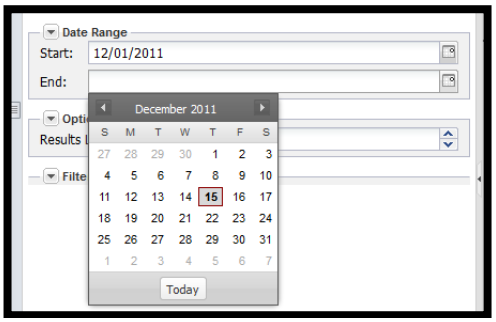
2. Press the **Audit Log** bar. A parameter menu will drop down



3. In the Query box you can enter in a **Username,** the **Display Name** (or a portion of it), or a **WIUID.**

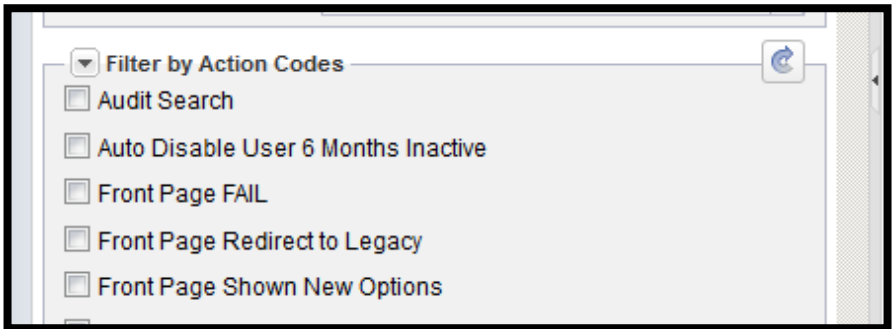
4. In the **Date Range** section you have the option to set a date range, though it is not required. To do this press the little calendar at the end of the **Start** and **End** lines.





5. In the **Options** section you can limit the number of lines returned during your inquiry. One hundred (100) is the default value. The maximum that will show in your browser is 500. If you download the output after the log search is completed the maximum line count is 10,000.

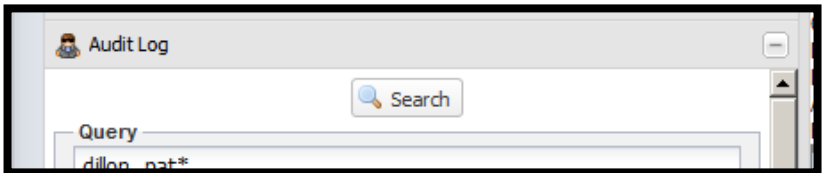
6. In the **Filter by Action Codes** section you can specify specific events that you want to audit on. You will notice that there are a number of them which can help you search for specific events. To refresh the Action Code selections, click the refresh button, which is the button with circular arrow to the right of "filter by Action Codes".



Audit Action Codes

Audit Search
Auto disable User 6 Months Inactive
Front Page FAIL
Front Page Redirect to Legacy
Front Page Shown Invalid Username
Front Page Shown new Options
Front Page Shown New Please Activate
Pass Reset (using known pass)
Pass Reset (using known pass) FAIL
Pwd Expiration Notification
Pwd Expiration Notification FAIL
Pwd Expiration Notification SKIPPED
Reports Search
Sched. Task Delete
Self Shared Secret Questions Pull
Self Shared Secret Questions Pull FAIL
Self Shared Secret Questions Save
SSRPM Activate
SSRPM Auth
SSRPM Auth (CR-Reset) Fail
SSRPM Auth (CR-Unlock) Fail
SSRPM Auth Fail
SSRPM Auto Unenroll
SSRPM BLOCK
SSRPM RESET
SSRPM UNLOCK
UMRA Auth
UMRA Auth Fail
UMRA Convert to Mailbox
UMRA Convert to Mailuser
UMRA Create Mailbox
UMRA Create Mailuser
UMRA Create User
UMRA LBAC
UMRA Load User
UMRA New SMTP Proxy
UMRA RBAC
UMRA RBAC/LBAC Pull
UMRA Remove Mailbox
UMRA Remove Mailuser
UMRA Reset Pass
UMRA Set Attr
UMRA Shared Q&A Pull
UMRA Transfer (OU)
UMRA Update Mailbox
UMRA Update Mailuser
UMRA user block
UMRA User delete
UMRA User disable
UMRA User enable
UMRA User unlock
UMRA Username Change
UMRA Wipe AD SID

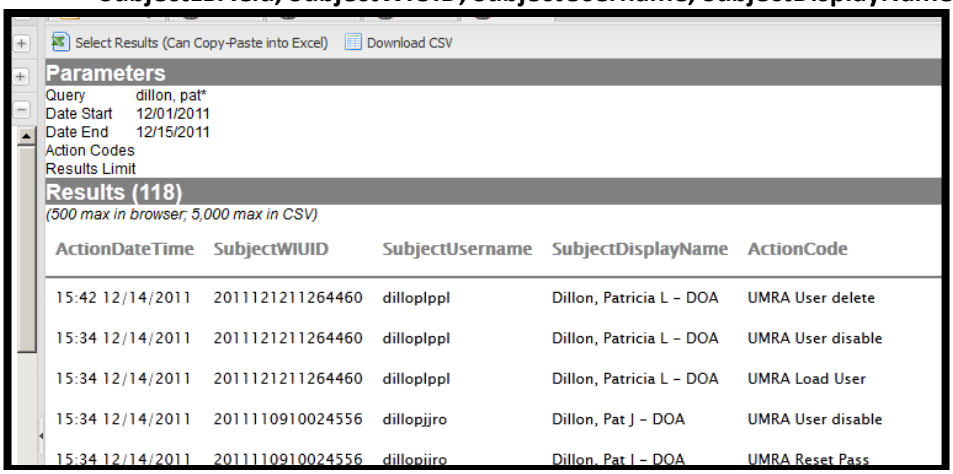
7. Once you have entered in your parameters for your audit search press the **Search** button.



Audit Listing

8. Your results will appear on the right side of the screen.

   - The **parameters** used to create the listing are in the upper left hand corner of the report.
   - The number of lines of the listing is in the greyed out **Results** line in ( ).
   - The information is under the column heads of **ActionDateTime, ActionCode, ActionOldValue, ActionNewValue, ActorCN, ActorLBACid, ActorWIUID, ActorUsername, ActorDisplayName, SubjectCN, SubjectLBACid, SubjectWIUID, SubjectUsername, SubjectDisplayName**



Exporting Audit Listing

9. The audit results can be exported to a spread sheet in 3 ways.

   - Use your mouse to highlight the lines you wish to copy and paste into an Excel spread sheet.
   - Press the **Select Results** button and you can copy and paste the whole report into an Excel spreadsheet.
   - Press the **Download CSV.** Screens will follow depending on the browser you are using that lead to a spread sheet with the audit report imported into it.

SECTION 9. REPORTS

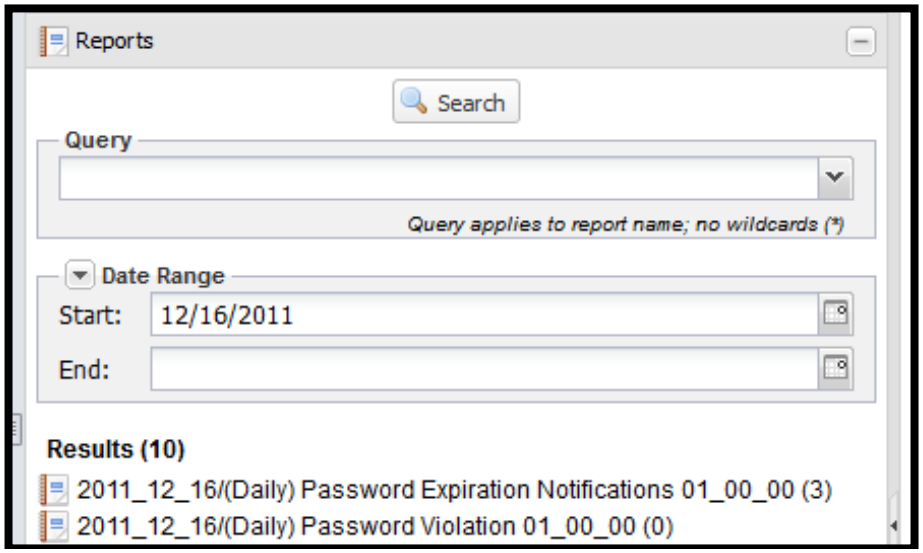
There are a number of 'canned' reports available in UMRA for agency security administrator review. It is strongly recommended that someone from each agency review these reports on a regular basis.

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

Viewing Report

2. Press the Reports bar. Parameter fields will drop down under the **Reports** bar. By default the security reports for the current day will also appear.



3. To view reports use your mouse to click on the report under **Results**. You will see the report appear on the right hand side of the screen. The report titles are formatted has follows:
   YYYY_MM_DD(frequency) Report Name HH_MM_SS (# lines)

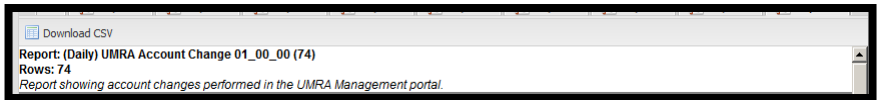
YYYY_MM_DD	= Date of run
Frequency	= Daily, weekly, monthly, etc
Report name	= Name of report
HH_MM_SS	= Time of run
(# lines)	= Number of lines in report

Download CSV

Report: (Daily) UMRA Account Change 01_00_00 (74)
Rows: 74
Report showing account changes performed in the UMRA Management portal.

Time	WIUID	Display Name	Username	Location	ActionCode	Notes	Old Value
16:08 12/15/2011	1111111111111111	Jouikov, Ivan V - GAB	advtest	accounts.wistate.dev/Staff /AccountabilityBoard /Jouikov: Ivan V ~ 1111111111111111	UMRA User disable		
16:08 12/15/2011	1111111111111111	Jouikov, Ivan V - GAB	advtest	accounts.wistate.dev/Staff /AccountabilityBoard /Jouikov: Ivan V ~ 1111111111111111	UMRA User enable	Also wiStatus is cleared	
15:27 12/15/2011	2011121216280487	Jouikov, Ivan V - DOA	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov: Ivan V ~ 2011121216280487	UMRA Sanitize User	User deleted due to mailbox sanitization due to cross-agency move; new OU: Staff/Administration	accounts /Account Ivan V ~ 2
15:27 12/15/2011	2011121216280487	Jouikov, Ivan V - DOA	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov: Ivan V ~ 2011121216280487	UMRA Create Mailbox	Size: [C] Alias: [IvanV2.Jouikov@wistate.dev] Web Mail Access: [yes] Hide from GAL: [no] Disabled: [no] Store: [MEWMAD0DC1N2\ONCC01G02SG01d]	
15:27 12/15/2011	2011121216280487	Jouikov, Ivan V - DOA	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov: Ivan V ~ 2011121216280487	UMRA Set Attr	wiDepartmentCode	
15:27 12/15/2011	2011121216280487	Jouikov, Ivan V - DOA	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov: Ivan V ~ 2011121216280487	UMRA Set Attr	wiDepartmentAbbrv	
15:27 12/15/2011	2011121216280487	Jouikov, Ivan V - DOA	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov: Ivan V ~ 2011121216280487	UMRA Set Attr	department	
15:27	2011121216280487	Jouikov, Ivan V -	jouikivfhc	accounts.wistate.dev/Staff /Administration/Jouikov:	UMRA Set	wiSSRPMEnrollDate	

4. In the upper left hand corner of the report you will find additional information about the run.



Report: (frequency) Report Name HH_MM_SS (# lines)
Rows: NN
Explanation of what information is reflected in the report

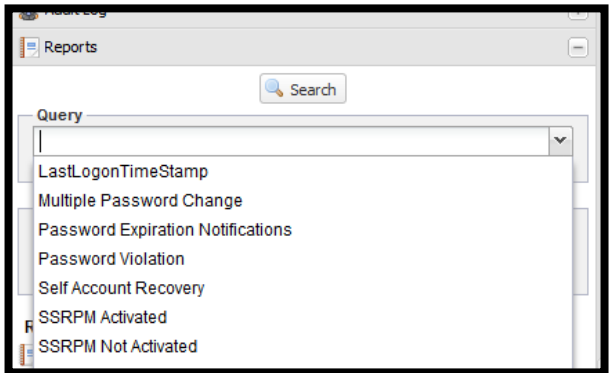
Frequency	= Daily, weekly, monthly, etc
Report name	= Name of report
HH_MM_SS	= Time of run
(# lines)	= Number of lines in report
NN	= Number of lines in report

Exporting Security Report

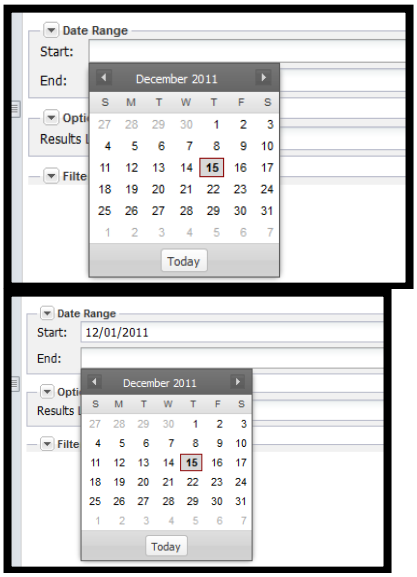
5. The audit results can be exported to a spread sheet by pressing the Download CSV in the upper left hand corner of the report. Screens will follow depending on the browser you are using that lead to a spread sheet with the security report imported into it.

Using Parameters to Search for Security Reports

6. Using the **Query** parameter you can select the specific report that you are looking to view. You can either enter in a query manually or drop down the listing of reports is available. With your mouse click on the report you want.



7. In the **Date Range** section you have the option to set a date range, though it is not required. To do this press the little calendar at the end of the **Start** and **End** lines.



Available 'Canned' Reports

Weekly

Last Logon Time Stamp	Weekly report showing inactive accounts defined as accounts that have not signed on in over 30 days (but no more than 180 days) or never at all, or have not changed their password in over 60 days (but no more than 180 days) or never at all.
Multiple Password Change	Report showing accounts that have had more than 3 password changes or have gone through 3 or more Account Recoveries in the past week.
Password Violation	Report outlining Bad Password Attempt violations by the account. This applies to the self-password reset page only.
Self-Account Recovery	Report showing which accounts went through account recovery and were successful or unsuccessful
SSRPM Activated	Accounts in deployed OUs that have gone through the activation process.
SSRPM Not Activated	Accounts in deployed OUs that have not gone through the activation process
Stale Accounts	Weekly inactivity report showing which accounts have not been used in over 6 months
UMRA Account Change	Report showing account changes performed in the UMRA Management portal
UMRA Delete User	Report showing accounts deleted in the UMRA Management portal
UMRA New User	Report showing accounts created in the UMRA Management portal
UMRA Password Reset	Security Officer performs a Password Change through UMRA management portal.
UMRA Restore Account	Users reset own password using good known password
UMRA Suspend Account	Report showing accounts that were SSRPM Blocked in the UMRA Management portal

Daily

Password Expiration Notifications	Daily report showing which accounts were sent Userid password expiration warning letters

Password Violation	Report outlining Bad Password Attempt violations by accounts. This applies to the self-password reset page only.
RBAC-LBAC Groups Members	Report showing access granted to UMRA administrators. See Section 15 for more information regarding RBAC roles.
Self-Account Recovery	Report showing which accounts went through account recovery (SSRPM) and were successful or unsuccessful
SSRPM Activated	Accounts in deployed OUs that have gone through the activation process.
SSRPM Not Activated	Accounts in deployed OUs that have not gone through the activation process
UMRA Account Change	Report showing account changes performed in the UMRA Management portal
UMRA Delete User	Report showing accounts deleted in the UMRA Management portal
UMRA New User	Report showing accounts created in the UMRA Management portal
UMRA Password Reset	Security Officer performs a Password Change through UMRA management portal
UMRA Restore Account	Users reset own password using good known password
UMRA Suspend Account	Report showing accounts that were SSRPM Blocked in the UMRA Management portal

SECTION 10. LIVE DATA QUERIES

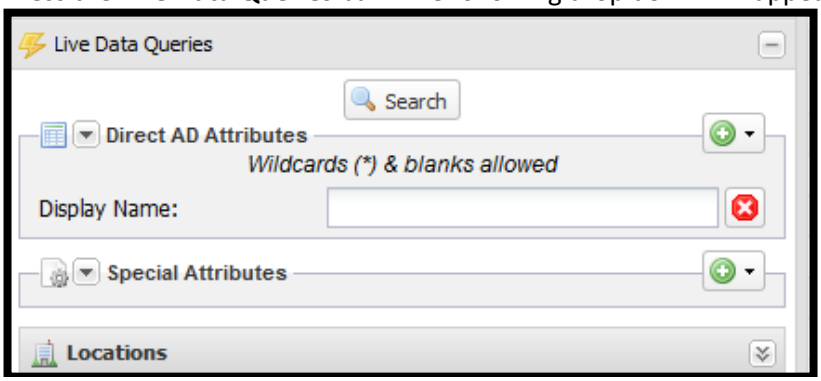
Within UMRA there is the capability to product reports using the contents of the Enterprise AD (IAM Userids) database. You can produce reports depending on values in certain fields to be executed on an ad-hoc (as needed) basis.

Sign On To Production UMRA

1. See instructions outlined in Section 1, Step 1.

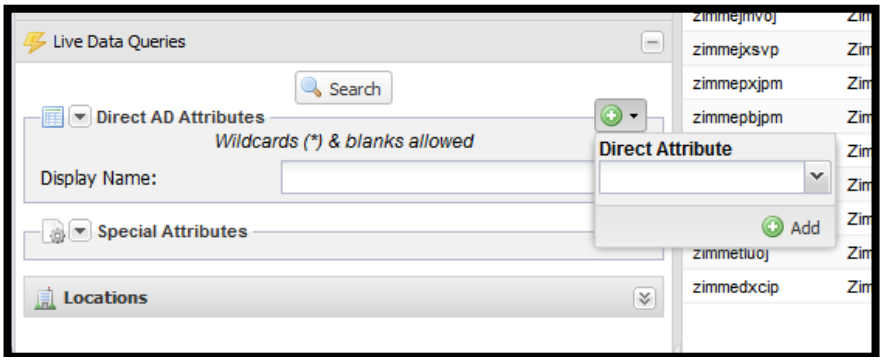
Producing Live Data Queries

2. Press the **Live Data Queries** bar. The following drop down will appear.

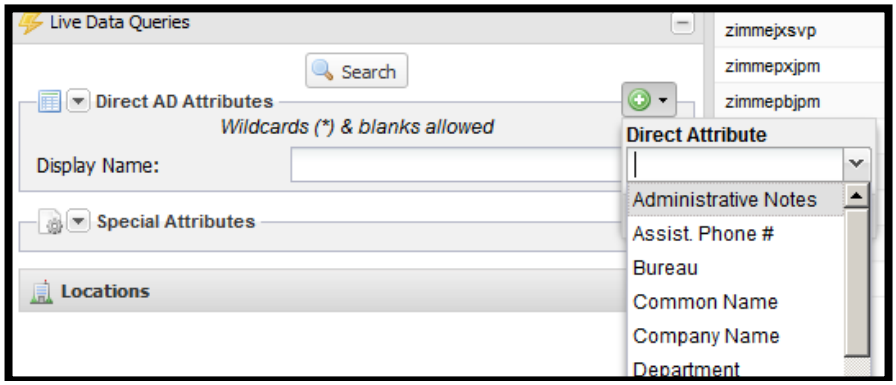


Direct AD Attributes

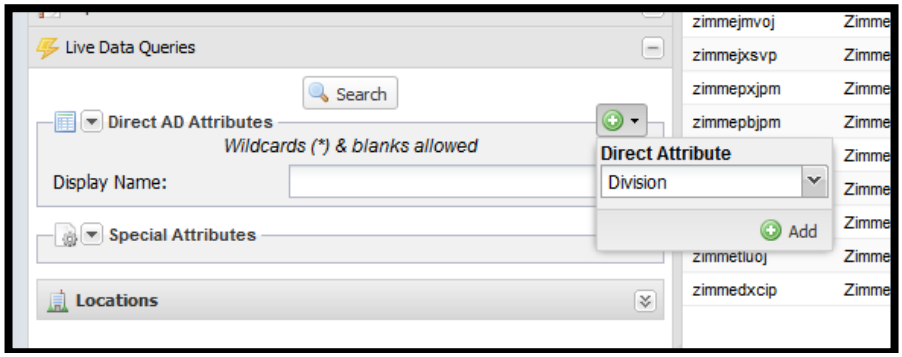
3. Press on the green circle drop down directly across from the 'Direct AD Attributes' heading. A drop down will appear with an empty field.



4. Press the drop down button on the right to select which Userid fields you wish to query.



5. Select the field you wish to query by clicking on it with your mouse



6. Press the green circle with the work **Add** after it.

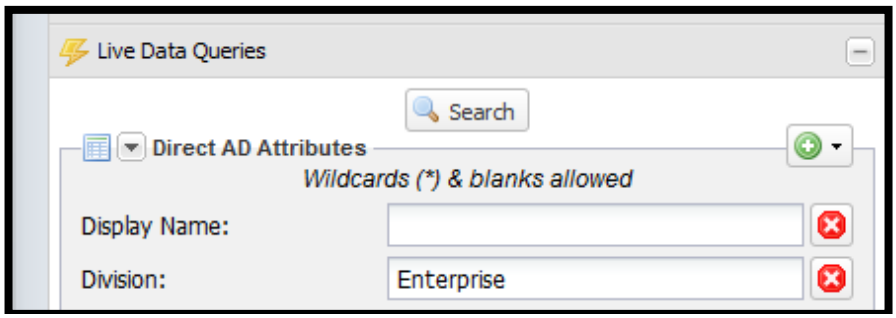
7. Notice that under 'Display Name:' the field you selected (Division in this case) appears. You can repeat steps 3 – 6 if you wish to perform a more complex query.

Available Direct Attributes

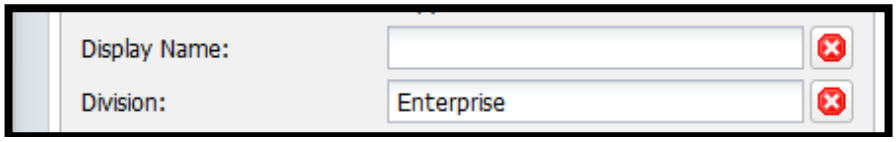
Admin. Notes
Assist. Phone #
Bureau
Common Name
Company Name

Depart. Abb.
Department Code
Department Name
Division
E-Mail
Employee Type
Extension
Fax #
First Name
Last Name
Legacy E-Mail
Legacy Userid
Loc. Address City
Loc. Addr. Office
Loc. Addr. State
Loc. Addr. Street
Loc. Address ZIP
Middle Name
Mobile Phone #
Name resolution
Orgcode
Pager #
Phone #
Postal Address
Postal Addr. City
Postal Addr. State
Postal Addr. ZIP
Section
Title
Unit
User Name
WIUID

8. Once you have added all the fields to your query you can enter your search criteria.

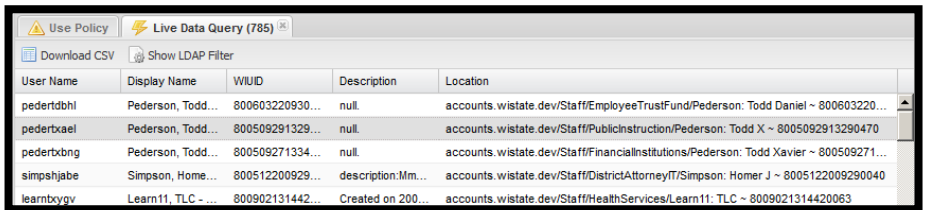


9. To delete a field from the query press the red X box after the field name.

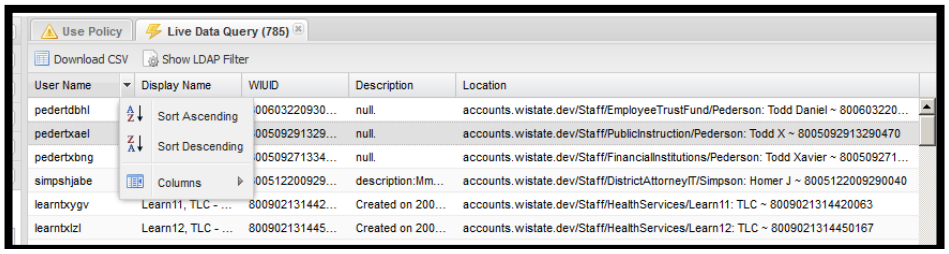


10. Now that your query parameters are done press the **Search** button to execute the query.

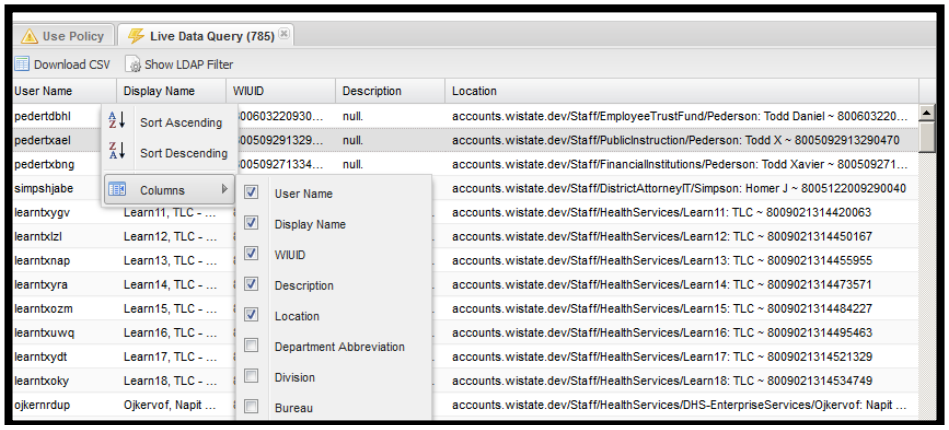
11. The query results will appear on the right side of your screen. **The first 500 lines will appear only. You can download the full report (max. 100,000 lines) into a spread sheet.**



12. You can change the sort of any of the columns by placing your mouse over the column name and press the drop down.



13. You can further change the fields shown by pressing the arrow after the **Columns** selection.



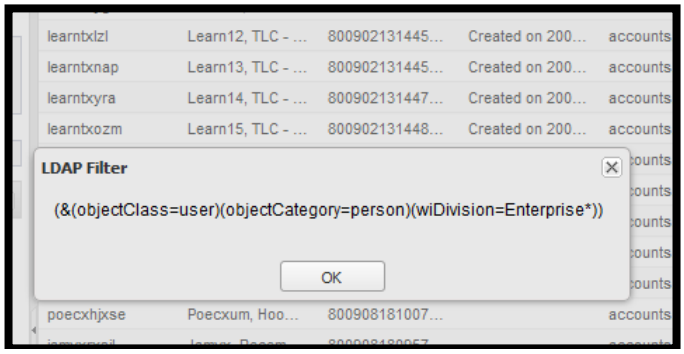
Additional Options Under Columns

Department Abbreviation
Division
Bureau
SSRPM Blocked
AD Disabled
AD Locked
Last Logon
Pswd Expires in X Days
Password Expires On
Password Last Set On
Mail Type
Mailbox Size
Hide From GAL
Web Mail Access
Mailbox Disabled

Exporting Query Results

14. The full query results **(max. 100,000 lines)** can be exported to a spread sheet by pressing the Download CSV in the upper left hand corner of the report. Screens will follow depending on the browser you are using that lead to a spread sheet with the security report imported into it.

15. To view your query parameters press **Show LDAP filter** near the upper left hand corner of the report. Press the **OK** button to close the **LDAP Filter** box.



Special Attributes

16. You add special attributes to the AD Attributes you specified above or you can run the **Special Attributes** on their own.

17. Press on the green circle drop down directly across from the 'Special Attributes' heading.

18. A drop down will appear with an empty field.

19. Press the drop down button on the right to select which special attributes you wish to use.

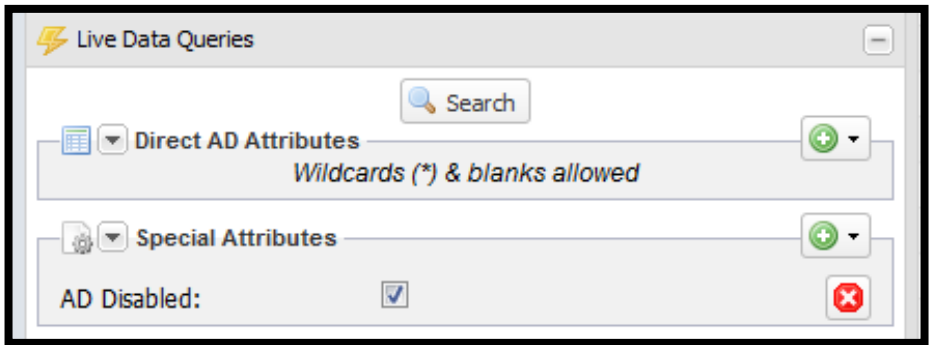
20. Select the special attribute you wish to execute by clicking your mouse on it.

21. Press the green circle with the word **Add** after it.

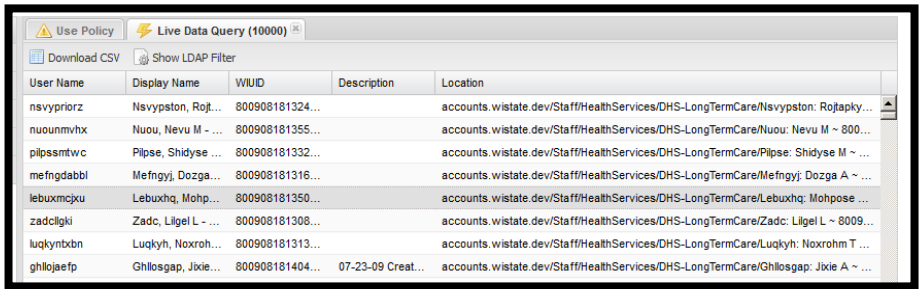
22. You will notice that under 'Special Attributes' the attribute you selected (AD Disabled in this case) appears. You can repeat steps 17 – 21 if you wish to perform a more complex query.

23. To delete a special attribute from the query press the red X box after the field name.

24. Now that your special attributes are done press the **Search** button to execute the query.



25. The query results will appear on the right side of your screen.



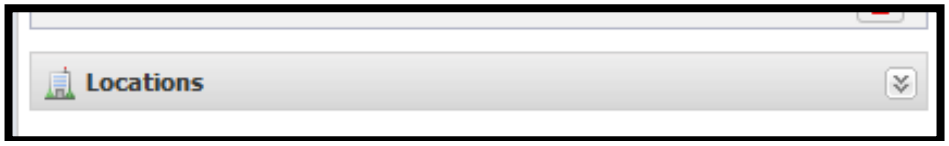
26. The option described in steps 13 – 15 above work for special Attribute listings as well.

Available Special Attributes

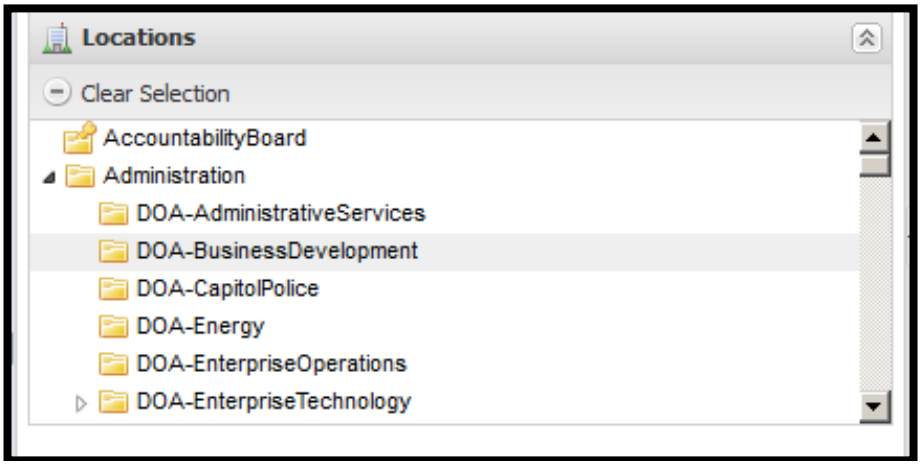
AD Disabled
AD Locked Out
AD Never Logged On
AD No Logons for X Days
Exchange Hide from GAL
Exchange Mail Type
Exchange Mailbox Disabled
Exchange Mailbox Size
Exchange Web Mail Access
Password Expires After
Password Expires Before
SSRPM Blocked

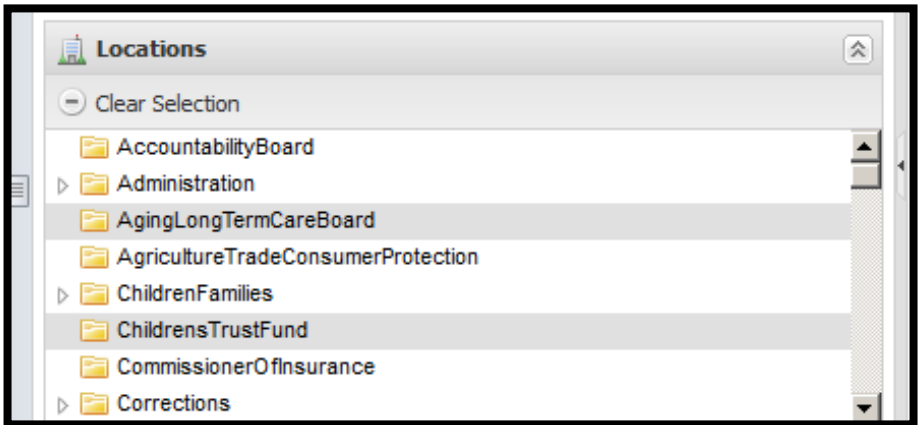
Locations

27. To reduce the size of your queries you can specify the location(s) that you want to execute with. Press the drop down arrows across from the **Locations** heading.



28. With your mouse click on the agency or agency sub OU to which you wish to limit your query to. You can select multiple locations by pressing down the **CTRL** button when using your mouse to click on the agency or agency sub OU.


Locations
Clear Selection
AccountabilityBoard
Administration
DOA-AdministrativeServices
DOA-BusinessDevelopment
DOA-CapitolPolice
DOA-Energy
DOA-EnterpriseOperations
DOA-EnterpriseTechnology


Locations
Clear Selection
AccountabilityBoard
Administration
AgingLongTermCareBoard
AgricultureTradeConsumerProtection
ChildrenFamilies
ChildrensTrustFund
CommissionerOfInsurance
Corrections

SECTION 11. SCHEDULE FUTURE COMMAND EXECUTION

UMRA allows you to schedule many of the manage user commands and inter-agency transfers to run at a later date.

Commands

You are allowed to schedule the following commands under the **Controls** column in **Managed Users.**

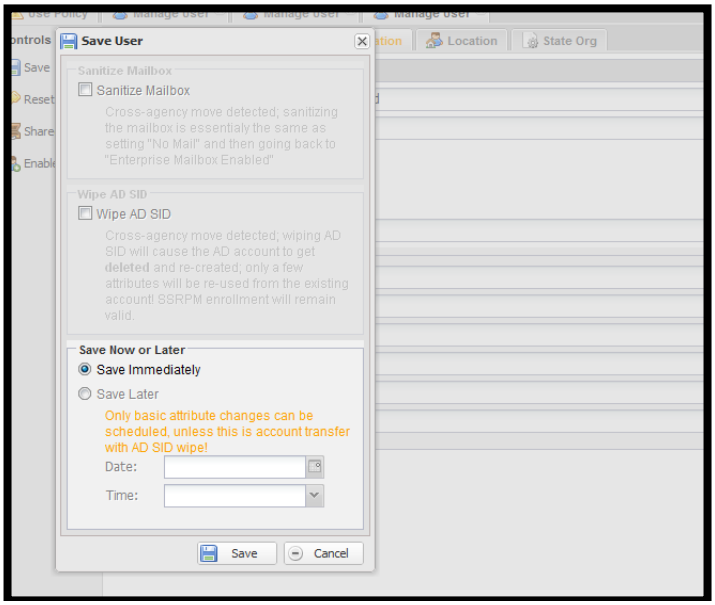
SSRPM Block
Disable
Enable
Unlock
Delete

Field Modifications NOT Allowed

You are NOT allowed to schedule modifications to the following fields.

First name
Middle name
Last Name
Generation Qualifier
Name Resolution
WIUID
Common Name
E-Mail
Mail Type
Mailbox Size
Hide from Gal
Web mail Access
Mailbox disable
Legacy E-Mail

When you **SAVE** a Userid modification that cannot be scheduled, the **Save User** box will open. Notice the **Save Later** option is shaded and in red it states 'Only sanitization or OU transfers and basic attribute changes are allowed'. Press the **SAVE** button to continue and your modification will be executed immediately.



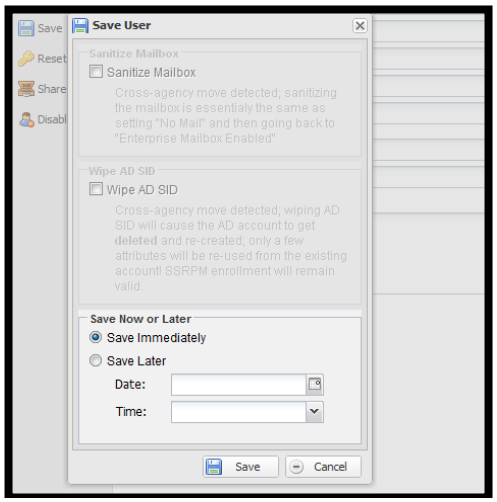
Field Modifications Allowed

You are allowed to schedule modifications to the following fields.

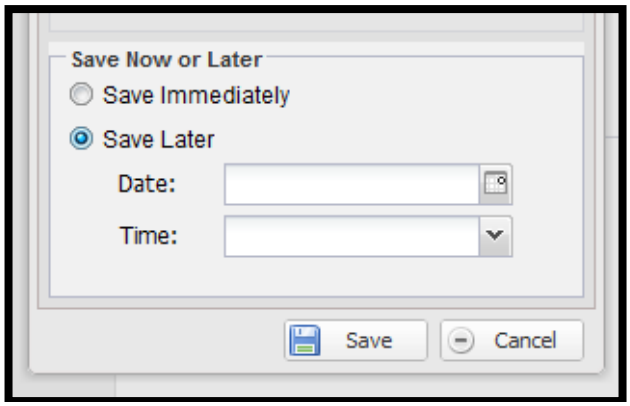
Employee Type
Administrative Notes
Legacy Userid
Display Name
Location
Phone #
Extension
Mobile Phone #
Pager #
Fax #
Assist. Phone #
Postal Address
Postal Address City
Postal Address State
Postal Address ZIP
Location Address Office
Location Address Street
Location Address City
Location Address State
Location Address ZIP
Company name
Title
Division
Bureau

Section
Unit
Orgcode
Department Name
Department Abbreviation
Department Code

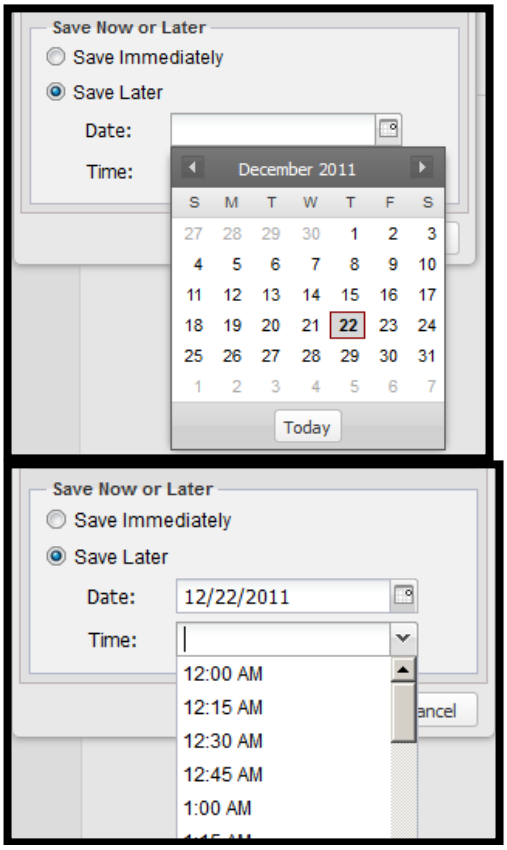
1. When you **SAVE** an allowed Userid modification or a command that can be scheduled, the **Save User** box will open and you will note the option to **Save Later.**



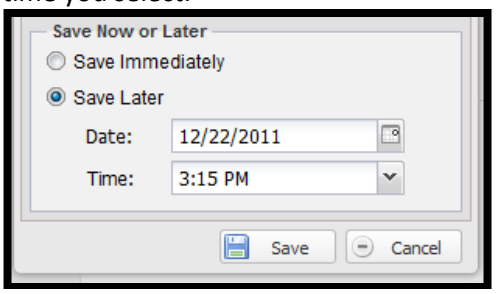
2. Press the radio button in front of **Save Later** and fill in the **Date** and **Time** fields.



3. You can use the drop downs at the end of each field to assist you with selecting the field values.

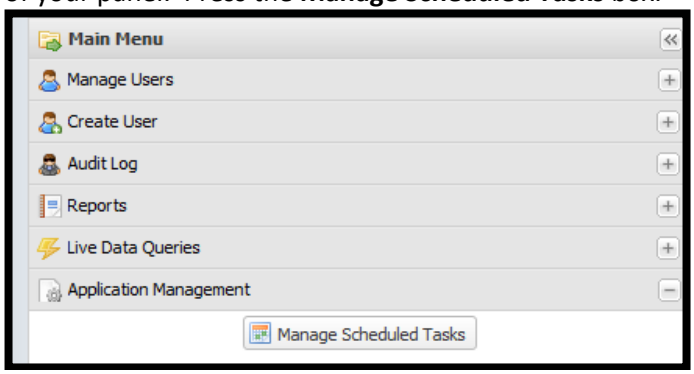


4. Press the **SAVE** button. The command will execute within a 5 minute time frame of the time you select.

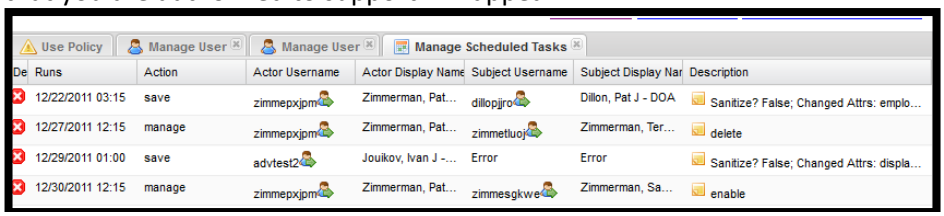


5. The **Schedule Set** box will come up telling you that 'Your schedule has been submitted! The form will now reload…' Press the **OK** button.

6. You will notice that the Userid you are working on will return all fields to their original values and will wait until the scheduled time to actually execute the change.
7. To view all scheduled events press the **Application Management** box on the left of your panel. Press the **Manage Scheduled Tasks** box.



8. On the right side of your panel all scheduled changes impacting the agency(ies) that you are authorized to support will appear.



- An agency security officer can delete any change that involves their agency by pressing the **red icon with the white X** in the **Delete** column.
- The word 'ERROR' in either the **Actor Username, Actor Display Name, Subject Username or Subject Display Name** fields mean that the Userid associated with those fields is no longer defined on the system.
- In the case of the word 'ERROR' in the **Subject Username and Subject Display Name** fields, these scheduled actions will **FAIL** and an email will be sent to the System Administrators.

SECTION 12. TRANSFER PROCEDURE

Transfer Exemptions

Department of Children and Families is exempt from having IAM Userids transferred out.
Department of Revenue is exempt from having IAM Userids transferred out.
Department of Transportation is exempt from having IAM Userids transferred in or out.
Department of Workforce Development, Deloitte Consulting & Labor Industry Review (all administered by DWD) is exempt from having IAM Userids transferred in or out.

Transfer Scenario

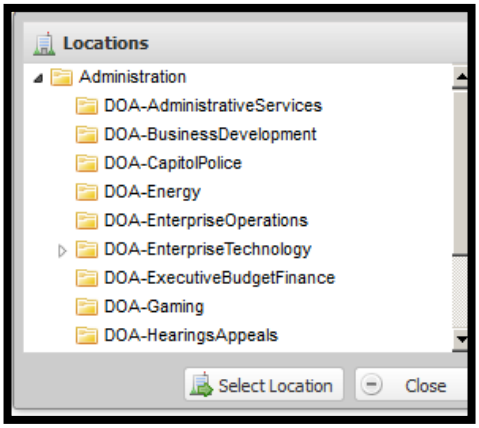
1. Agency security administrator checks to see if a new IAM Userid request is for an individual that already has an IAM Userid at any other agency.
2. The sending or receiving agency IAM Security Administrator sends an email with the following information to DET IAM Security (DOA DL IAM Security) to request a transfer.
   - Name of the individual being transferred
   - Name of Sending Agency and Receiving Agency
   - Date the transfer should be completed

   NOTE: Enterprise Mailboxes are SANITIZIED by default. If the employee wishes to take their Email (messages, calendar appointments, contacts, etc) to the new agency, please indicate this in the message. Any agency considering the transfer of Email from one agency to another should consult with their legal team.
3. DET IAM Security verifies via Email with both the sending/receiving agency IAM Security Administrator of the pending transfer.
4. If the sending agency uses Enterprise Email and they wish to have a copy of the mailbox contents for business purposes or to send a copy along with the employee, the sending agency Exchange Administrator must export the contents of Enterprise Email mailbox to a .PST file. If the employee is taking a copy of their mailbox data to the new agency, the file must be placed on portable media and given to the employee. **Note: this must be completed before DET IAM Security transfer's the IAM Userid to the new agency.**
5. DET IAM Security executes or schedules the transfer on the agreed on date and notifies the receiving agency IAM Security Administrator when done. DET IAM Security will normally be using an automated process that will:
   - Clear any values from most fields and change the Userid password
   - Create a new IAM Userid with the same WIUID, Userid, First name, Last Name, Middle Name, and E-Mail address.
   - Sanitize (empty) Enterprise Mailboxes
   - Transfer the IAM Userid to the receiving (new) agency.
6. When the transfer is completed, receiving agencies that use a legacy email system will have to replace **Mail Type: No Mail** to **Mail Type: External Mail Enabled.** They will also need to populate the **Legacy E-Mail** field with the correct **Legacy Email ID**.

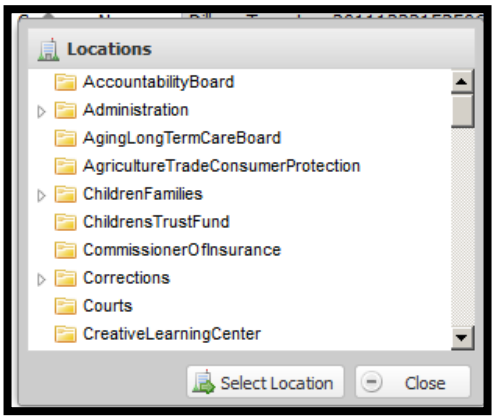
7. When the transfer is complete, the receiving agency IAM Security Administrator will make necessary changes to the IAM Userid and assign the Userid a new password.
8. If there is an agreement between the sending & receiving agency allowing the transferred employee to bring their mailbox data with them to the new agency, the employee will provide the file on portable media. The mailbox data is imported into the new mailbox by an Exchange Administrator.
9. For a user that has never activated their IAM Userid:
   - The agency IAM Security Administrator must provide the Userid owner with their IAM Userid and password along with Account Activation instructions.
   - The Userid owner must go through IAM Account Activation.

SECTION 13. USERID TRANSFERS

There are two types of Userid transfers. An **Internal** transfer is transferring a Userid within the same agency OU from one division or bureau to another. An **Inter-Agency** transfer is transferring a Userid from one agency level OU to another agency level OU.



Internal Transfer Example:
Transfer Userid from DOA-Gaming to DOA-Energy

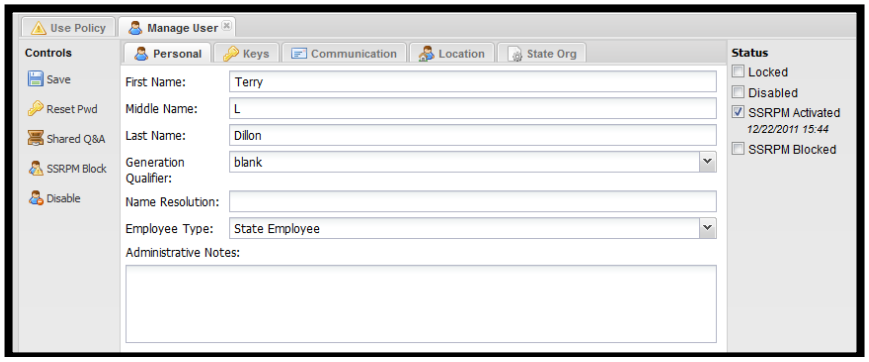


Inter-Agency Transfer Example:
Transfer Userid from Administration to Corrections

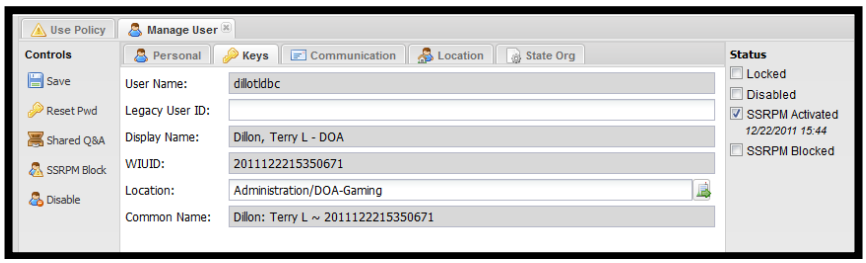
Internal Transfer

You may proceed to transfer the Userid if you locate the individual under one of your agency OU's. You are not able to transfer the Userid if you located it under another agency OU. You must then contact DET Security (DOA DL IAM Security or DOADLIAMSecurity@wisconsin.gov) for assistance.

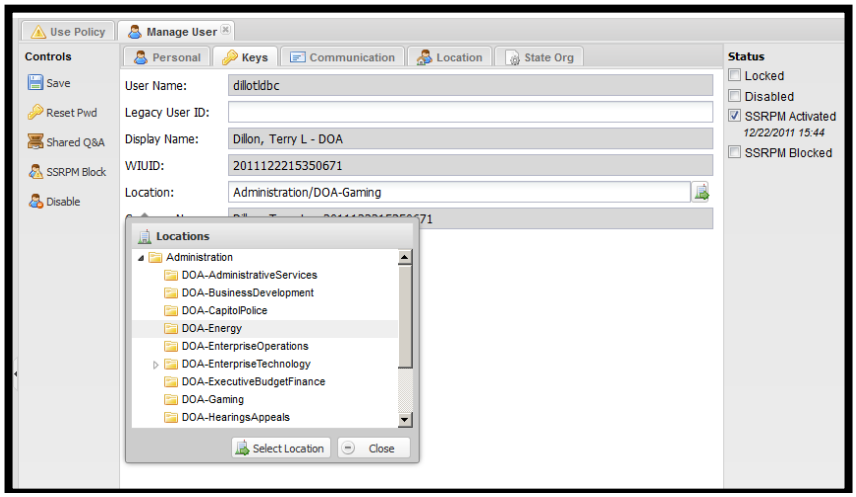
1. An Internal Transfer can be done by any agency Security Administrator that has sub OU's under their agency OU. Follow the steps in Section 1 of this document to bring up the Userid you wish to transfer. In the following example we are transferring Terry L Dillon from Administration/DOA-Gaming to Administration/DOA-Energy



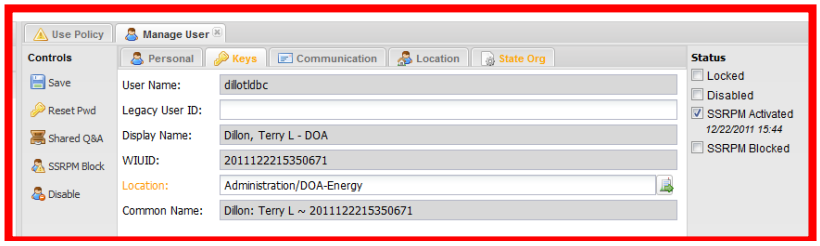
2. Press the **Keys** tab.



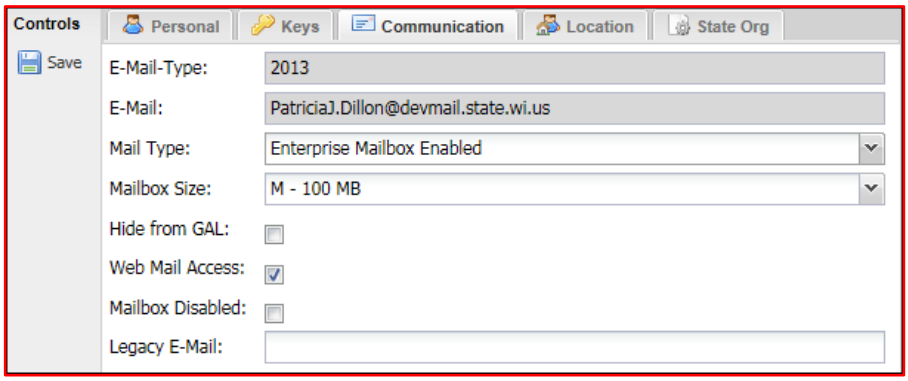
3. Press the drop down button to the right of the **Location** field. With your mouse select the location where you want the Userid transferred to. In this example the destination is DOA-Energy. Press the **Select Location** button.



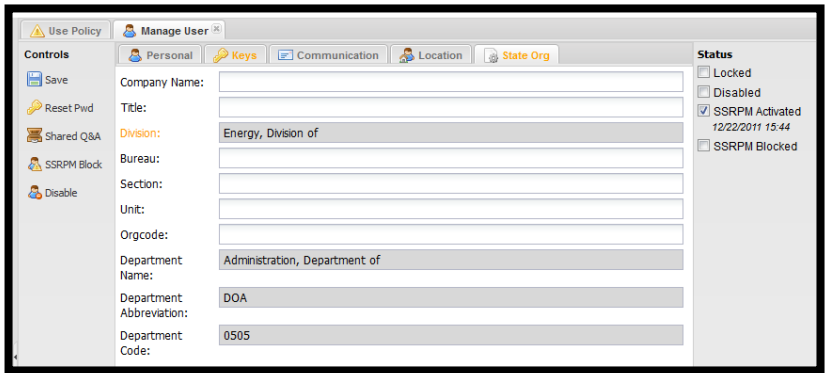
4. You will notice that the **Location** field title has changed color and the new location of Administration/DOA-Energy is in the field. You will also notice that the **State Org** tab has changed color. This is telling you that a field under this tab has changed.



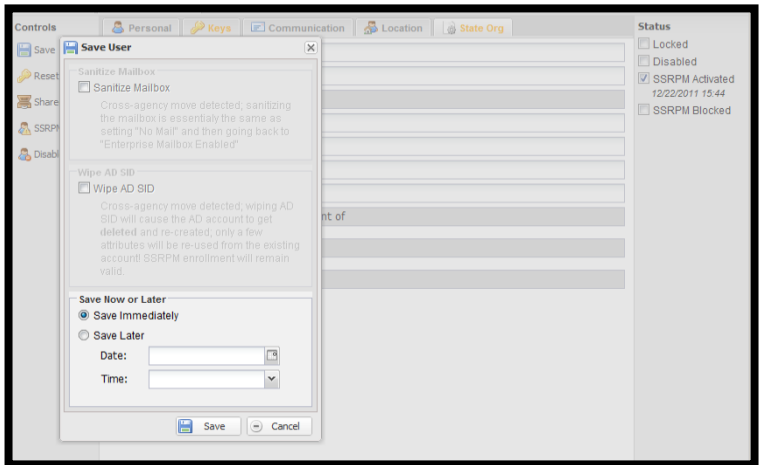
5. Press the **Communication** tab. It has been encountered that the when doing an internal transfer, the Mailbox Size will revert back to the agencies original Mailbox Size setting. Confirm that the mailbox size is correct for this userid.



6. Press the **State Org** tab. You will notice that the **Division** field title has changed color and the field contents have changed to reflect the new division contents.

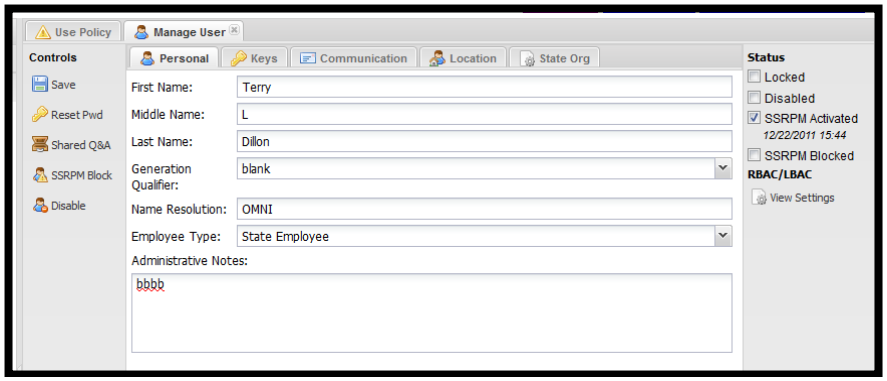


7. Press the **SAVE** button. The **Save User** box will come up. You will have the option to **Save Immediately** or schedule the save for later with **Save Later**. See Section 11 about scheduling your change

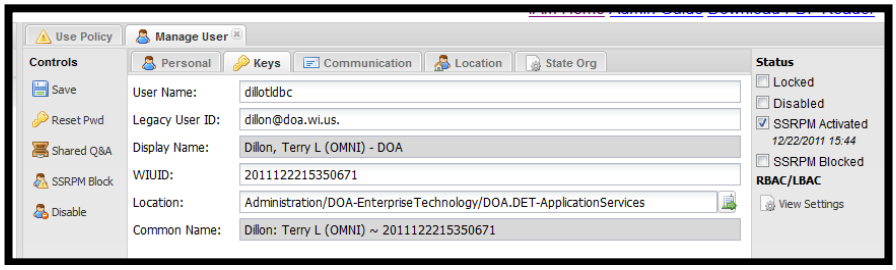


Inter-Agency Transfer

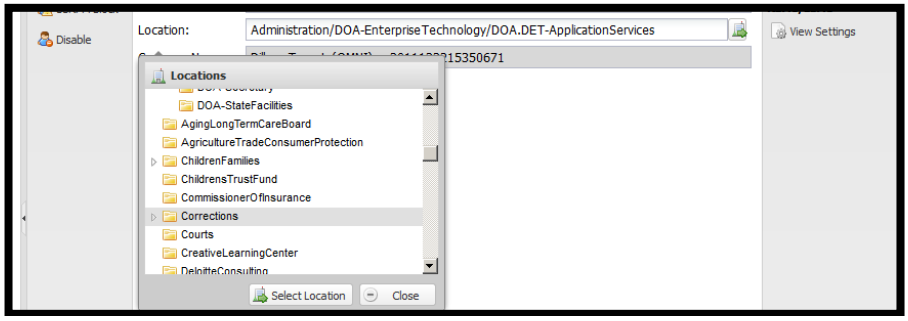
1. An Inter-Agency Transfer is a transfer of a Userid from one agency level OU to another agency level OU and is normally done by a DET IAM Security Administrator. It can also be done by an agency Security Administrator who has authority over multiple agency level OU's. Follow the steps in Section 1 of this document to bring up the Userid you wish to transfer. In the following example we are transferring Terry L Dillon from Administration/DOA-Enterprise Technology/DOA.DET-Application Services to Corrections.



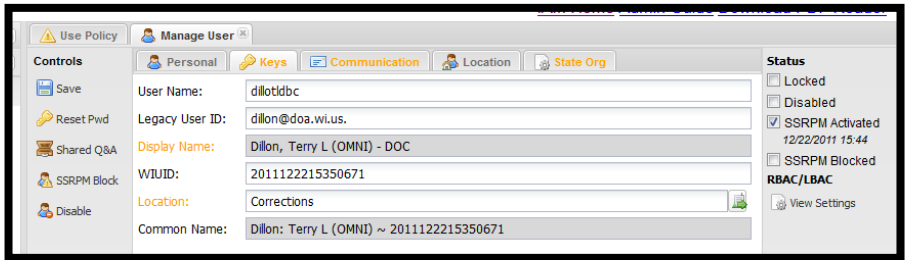
2. Press the **Keys** tab.



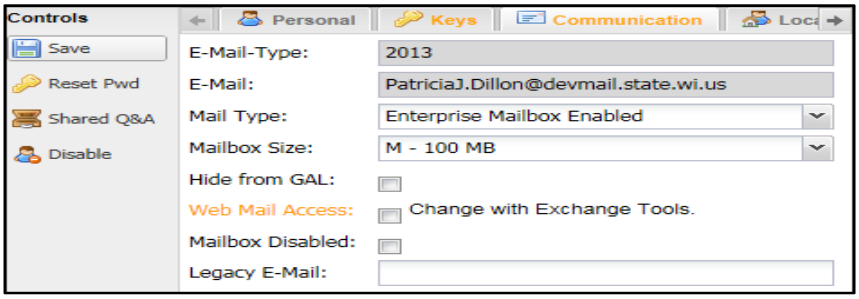
3. Press the drop down button to the right of the **Location** field. With your mouse select the location where you want the Userid transferred to. In this example the destination is Corrections. Press the **Select Location** button.



4. You will notice that the **Location** field title has changed color and the new location of Corrections is in the field. You will also notice that the **Display** Name field has changed to show the new agency in the display name. The **Communication** (not always) and the State **Org** tabs have changed color as well. This is telling you that fields under these tabs have changed.



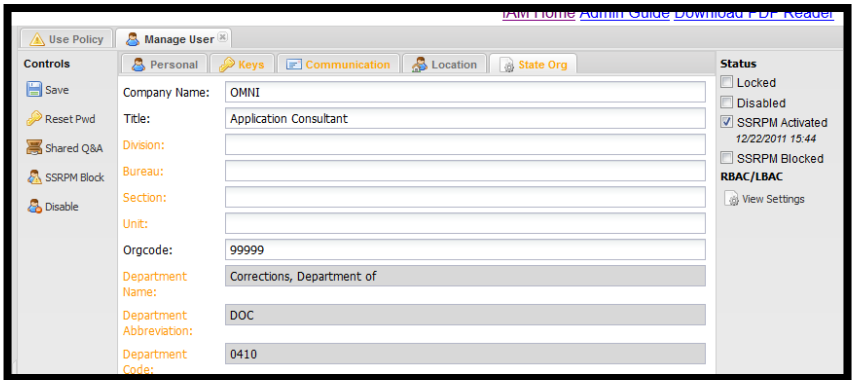
5. Press the **Communication** tab. You will notice that the **Web Mail Access** field titles has changed color and the field contents have changed to reflect the new values in this example. This tab does not always have changes.



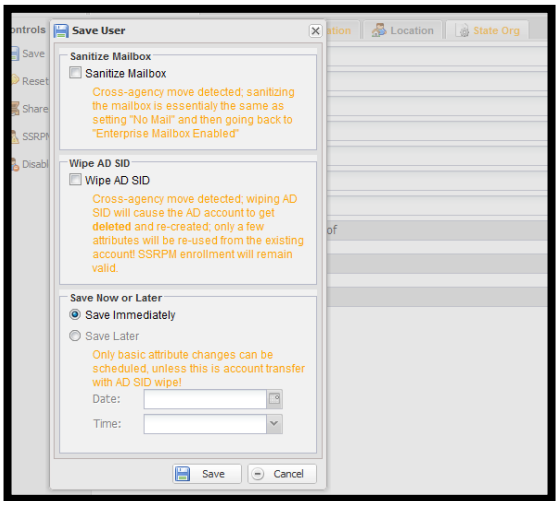
6. When transferring from an agency with **Mail Type: Enterprise Mailbox Enabled** to an agency with **Mail Type: External Mail Enabled**, over-ride the value with **Mail Type: No Mail.**

7. Press the **State Org** tab. You will notice that the **Division, Bureau, Section, Unit, Department Name, Department Abbreviation** and **Department Code** field titles

have changed color and the field contents have changed to reflect the new contents.



8. Press the **SAVE** button. The **Save User** box will come up.



a. Click on the box in front of **Sanitize Mailbox** if you want the Emailbox sanitized.

b. Click on the box in front of **Wipe AD SID** to get a new AD Userid created with a new SID and new password. This is the norm and would be very unusual if not checked.

c. You will have the option to **Save Immediately** or schedule the save for later with **Save Later**. See Section 11 about scheduling your change

d. Press the **SAVE** button.

9. Once the transfer is complete, agency security administrators can make all necessary informational changes to the Userid.

SECTION 14. REQUESTING NEW SUPPORT STAFF

Requesting a New Agency IAM Security Administrator

Current agency IAM Security Administrator	Create an IAM Userid for the new IAM Security Administrator.
Current agency IAM Security Administrator	Submit a properly filled out **Customer Data Security Officer /Representative/Authorization/ Attributes (DOA-10359)** to DET IAM Security.
DET IAM Security	Add the proper authority to the new agency IAM Security Administrator's IAM Userid.

Requesting a New Agency Delegated Exchange Administrator

Agency IAM Security Administrator	Create a Secondary IAM Userid for the new agency Delegated Exchange Administrator.
Agency IAM Security Administrator	Send an email to DET IAM Security (DOA DL IAM Security). Provide the Secondary IAM Userid and state that the Userid be given access to the agencies Delegated Exchange group.
DOA IAM Security	Confirm authority and open a Service Request for Onestop to add the secondary IAM ID to the agencies Delegated Exchange Administrator group.
Onestop	(1) Add this Userid to the proper delegated Exchange group. (2) Under the Terminal Service Profile tab on the secondary IAM Userid enter in Profile Path: \\accounts\profiles\metaframe\ %username%.

Requesting a New Agency Mailbox Auditor

Agency IAM Security Administrator	Create a Secondary IAM Userid for the new agency Mailbox Auditor.

Agency IAM Security Administrator	Send an email to DET IAM Security (DOA DL IAM Security). Provide the Secondary IAM Userid and state that the Userid be given access to the agencies Mailbox Auditor group.
DOA IAM Security	Confirm authority and open a Service Request for the AD Team to add the secondary IAM ID to the agencies Mailbox Auditor group.
DOA AD Team	(1) Add this Userid to the proper Mailbox Auditor group. (2) Under the Terminal Service Profile tab on the secondary IAM Userid enter in Profile Path: \\accounts\profiles\metaframe\%username%.

Requesting a New Agency Password Changer (Only)

Agency IAM Security Administrator	Create a Userid for the new password changer.
Agency IAM Security Administrator	Send an email to DET IAM Security (DOA DL IAM Security) with the new password changer's name and IAM Userid.
DET IAM Security	Add the proper authority to the new password changer's IAM Userid.

Requesting the Removal of an Agency IAM Security Administrator

Current agency IAM Security Administrator	Send an email to DET IAM Security (DOA DL IAM Security) requesting that IAM Security Administrator privileges be removed. Provide the former Security Administrator's name and IAM Userid.
DET IAM Security	Remove the privileges from the former IAM Security Administrator's IAM Userid.

Requesting the Removal of an Agency Delegated Exchange Administrator

Current agency IAM Security Administrator	Delete the individuals secondary IAM Userid. This will

	automatically clean up their access.
Requesting the Removal of an Agency Mailbox Auditor	
Current agency IAM Security Administrator	Delete the individuals secondary IAM Userid. This will automatically clean up their access.
Requesting the Removal of an Agency Password Changer (Only)	
Current agency IAM Security Administrator	Send an e-mail to DET Security (DOA DL IAM Security) requesting that the IAM password changer capabilities be removed. Provide the former password changer's name and IAM Userid.
DET IAM Security	Remove authority to the former password changer's IAM Userid.
Requesting any other type of Admin access not related to IAM or Exchange	
Current agency IAM Security Administrator	Create a Secondary IAM Userid for the new administrator.
Current agency IAM Security Administrator	Follow this link to request admin access: Support [ADMIN] Account Request

SECTION 15. APPLICATION MANAGEMENT (RBAC / LBAC)

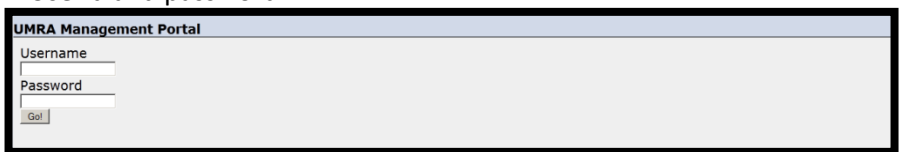
Functions in this section are performed by a Level 0 or Level 1 Security Administrator. Agency Security Administrators will not see these functions on their UMRA panel.

Security Administrator Privileges

Add Privilege

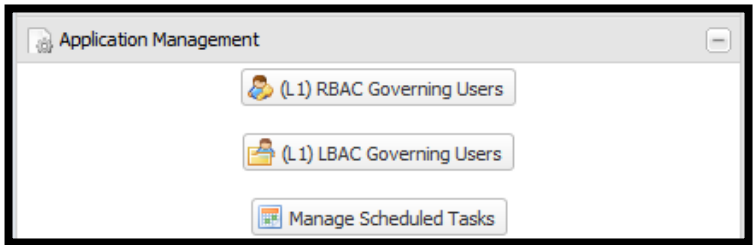
To add Security Administrator privileges you must first receive a properly filled out **Customer Data Security Officer/Representative/Authorization/Attributes (DOA-10359)** form. To remove this privilege an Email must have received by DET IAM Security from an appropriate agency IAM Security Administrator.

1. Log on to UMRA at URL is https://iam.wisconsin.gov/umra with your IAM Userid and password.

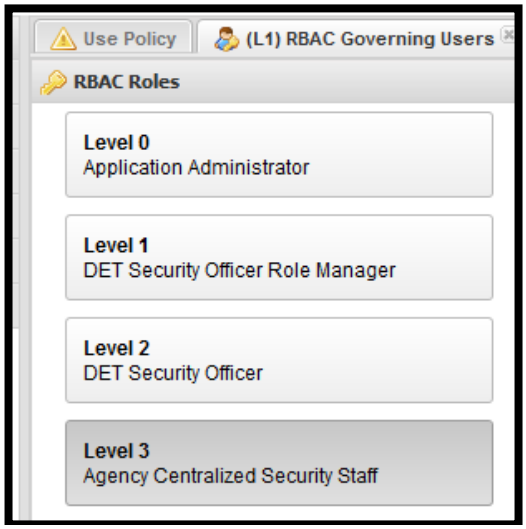


2. Press the **Application Management** bar.

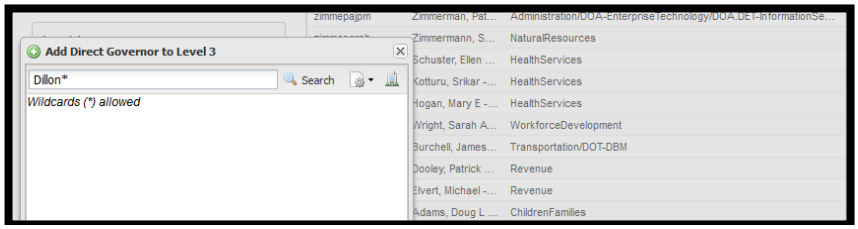
3. Press the **(L1) RBAC Governing Users** button



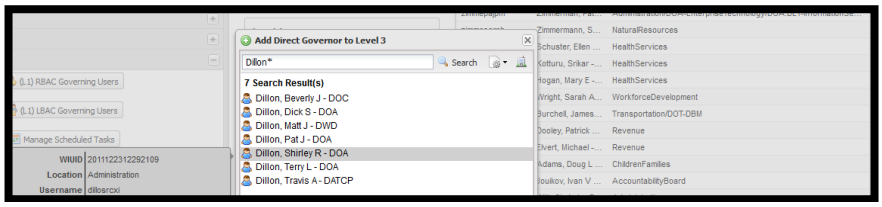
4. Press the **Level 3 (Agency Centralized Security Staff)** button. NOTE: A single Userid can only be a member of **ONE** RBAC role level.



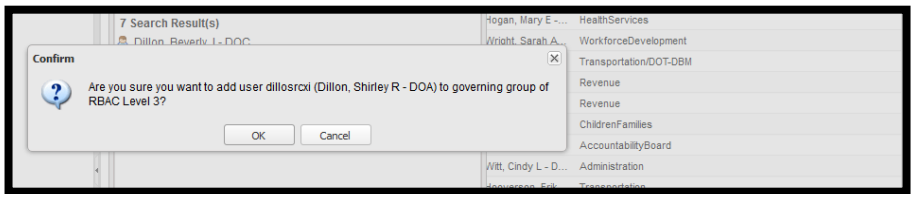
5. You will see a listing of current Level 3 User on the right side of your panel. To add an individual press the **Add** button. Enter in a partial **Display Name** in the **Search** field of the individual you wish to add. Press the **Search** button. **Note you are limited to alphanumeric, spaces, dashes, commas, periods, underscores, @, or asterisks (*)**



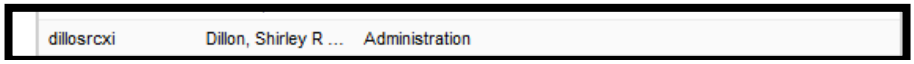
6. With your mouse click on the name of the individual you wish to add.



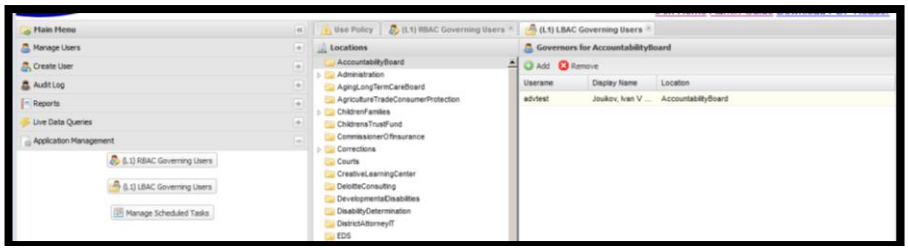
7. Press the **OK** button in the **Confirm** box in reply to the question 'Are you sure you want to add user xxxxxxxxxx (display name) to governing group of RBAC Level 3?'



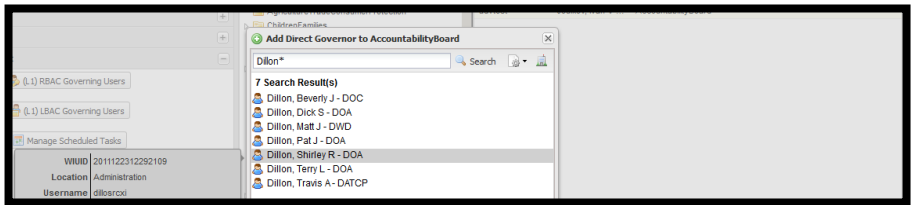
8. You will notice that he user has been added to the bottom of the list. You can press the **Username, Display Name,** or **location** column headings to resort the listing.



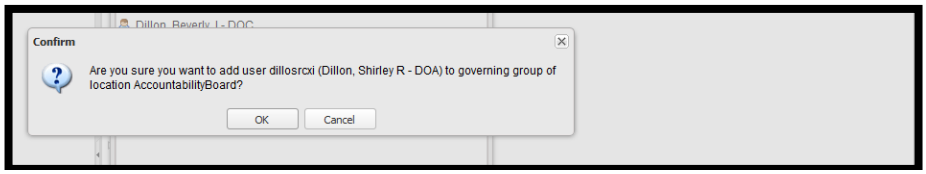
9. Press the **(L1) LBAC Governing Users** button under **Application Management.** With your mouse highlight the agency you wish to add this person to as an agency security administrator. The current agency security administrators will show up on the right.



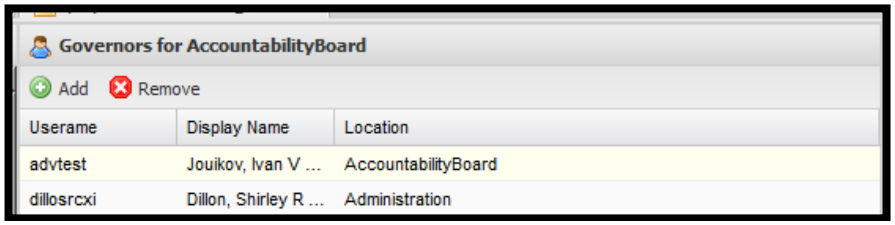
10. Press the **Add** button. A search box will come up. Enter the partial display name of the individual you wish to add and press the **Search** button. With your mouse click on the individual you wish to add.



11. The **Confirm** box will appear. Press the **OK** button to answer 'Are you sure you want to add user xxxxxxxxxx (display name) to governing group of location "agency here"?

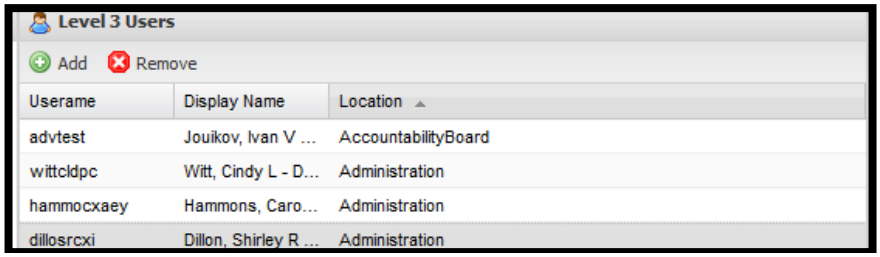


12. You will notice that your new person has been added.

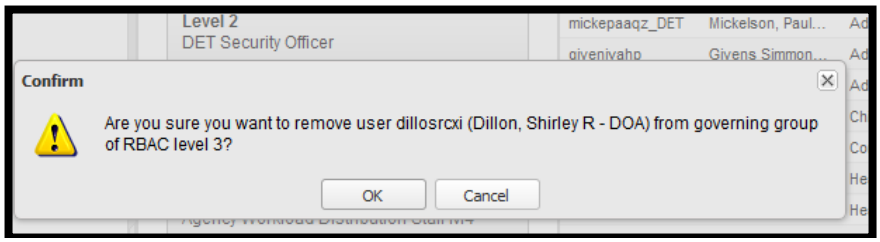


Delete Privilege

1. Repeat steps 1 through 4 above.
2. To delete user as an Agency Security Administrator highlight their name and press the REMOVE button.

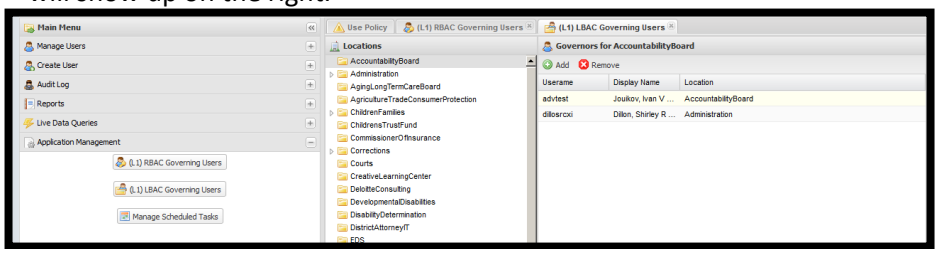


3. In the **Confirm** box answer 'Are you sure you want to remove user xxxxxxxxxx (display name) from governing group of RBAC level 3 by pressing the **OK** button.

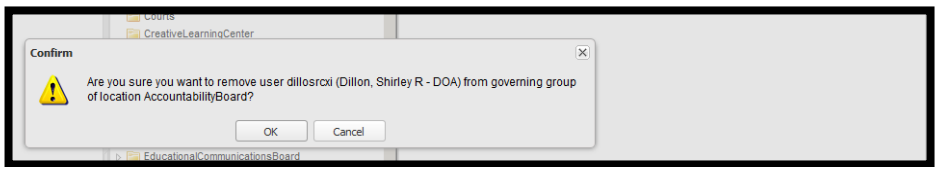


4. You will note that the individuals name has disappeared from the list.

5. Press the **(L1) LBAC Governing Users** button under **Application Management.** With your mouse highlight the agency you wish to remove this person from as an agency security administrator. The current agency security administrators will show up on the right.



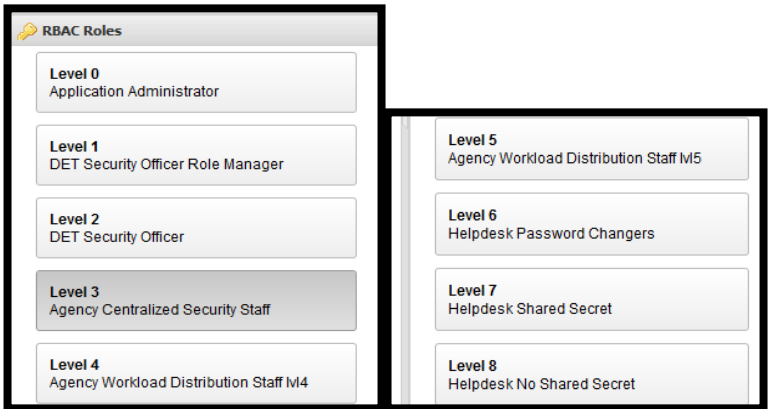
6. With your mouse highlight the name of the individual you wish to remove. Press the **REMOVE** button. The **Confirm** box will come up and press the **OK** button in answer to the question 'Are you sure you want to remove user xxxxxxxxxx (display name) from governing group of location 'agency name here'?'



7. You will note that the individuals name has disappeared from the list.

Other RBAC Roles

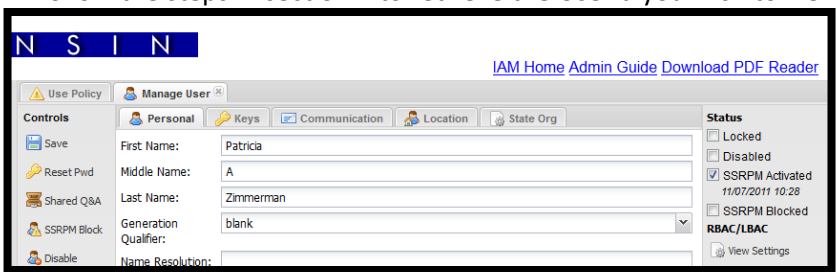
There are other RBAC Roles that a Level 0 and Level 1 Administrator could be adding and removing. The process to do this would all following the same format as steps 1 – 19 above which covered adding and deleting an agency security administrator. Levels 1 through 4 require a **Data Security Officer/Representative/Authorization/Attributes (DOA-10359)** form. Levels 5 through 8 require an email from the appropriate authoritive party. **NOTE: A single Userid can only be a member of ONE RBAC Roles level**



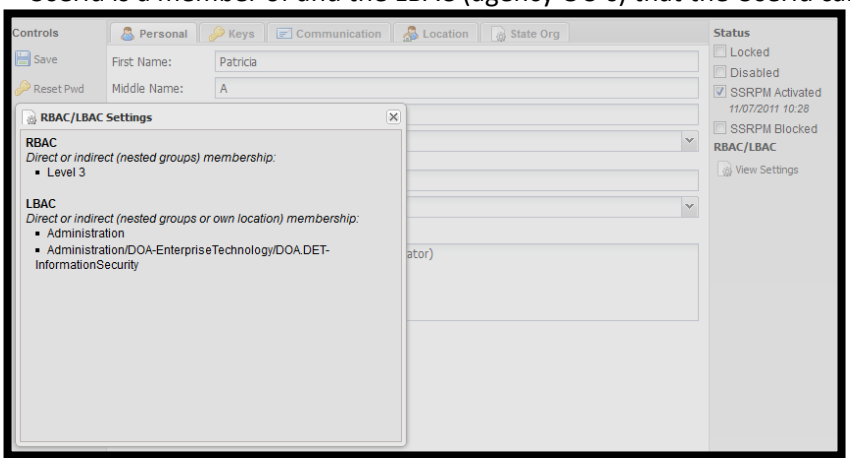
Level 0 – UMRA Technical Support Staff
Level 1 – Enterprise Security Administrator (Manage Roles)
Level 2 – Enterprise Security Administrator
Level 3 – Agency Security Administrator (Centralized)
Level 4 – Agency Security Administrator (Distributed)
Same as level 3 without the capability to perform TRANSFER's or view SCHEDULED changes.
Level 5 – Agency support for specific field
Level 6 – Password Changers
Level 7 – Browse Userids (including Shared Secret Question/Answer)
Level 8 – Browse Userids (excluding Shared Secret Question/Answer)

Display Current RBAC and LBAC Settings

1. Follow the steps in section 1 to retrieve the Userid you wish to view.



2. On the right side of the panel click on the **View Settings** button. The **RBAC/LBAC Settings** box will open up showing you the RBAC levels that the Userid is a member of and the LBAC (agency OU's) that the Userid can manage.



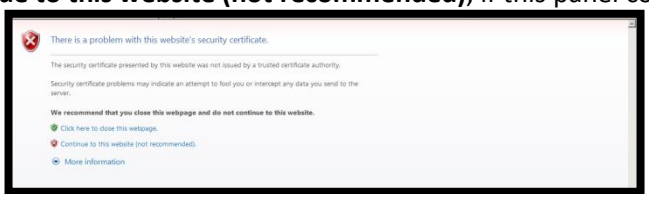
SECTION 16. OTHER REPORTING

This section provides information on other reports that are currently available or generated.

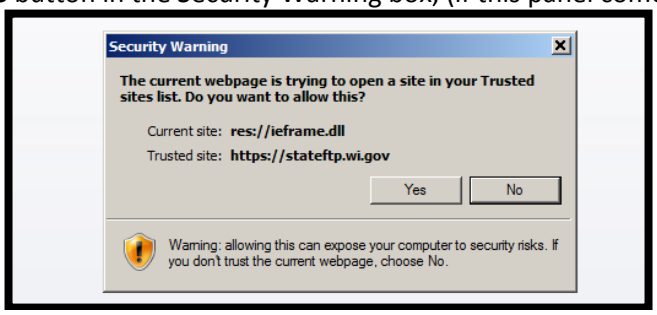
Enterprise Email Mailbox Size Report (Run Ad-Hoc)

This report is available to each agency IAM Security Administrator in Ad Hoc mode (run as you need it). It is a listing of each Enterprise mailbox and its current size. The layout is similar to below.

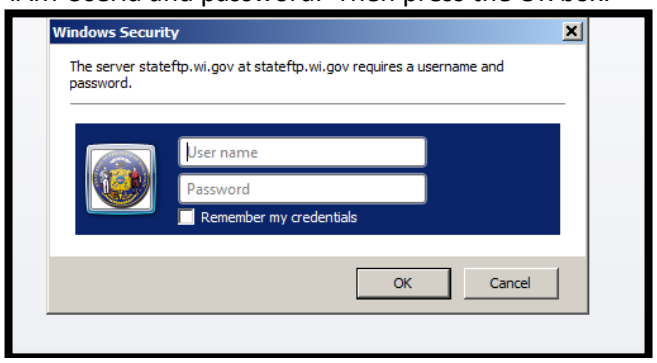
1. Go to URL https://stateftp.wi.gov/DOA/statenet/iam_reports/
2. Press **Continue to this website (not recommended)**, if this panel comes up



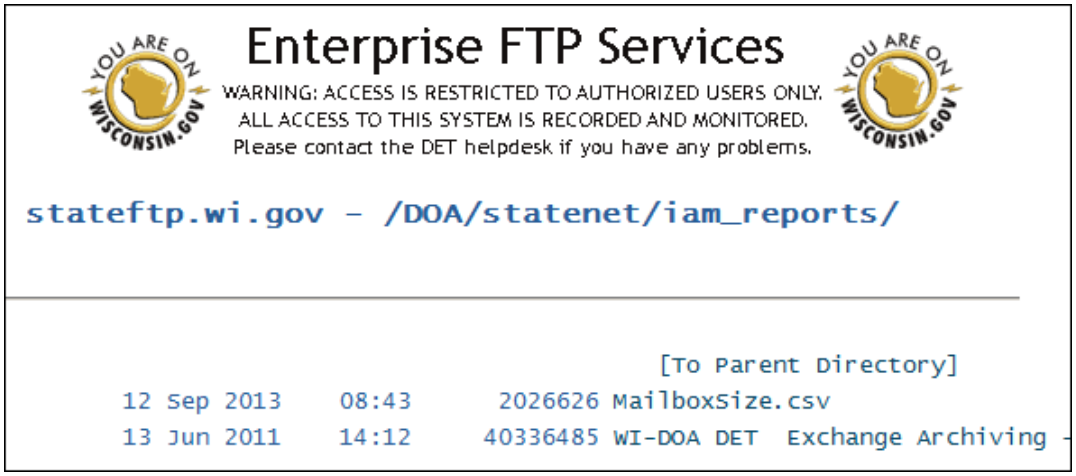
3. Press the **YES** button in the Security Warning box, (if this panel comes up)



4. Enter in your IAM Userid and password. Then press the OK box.



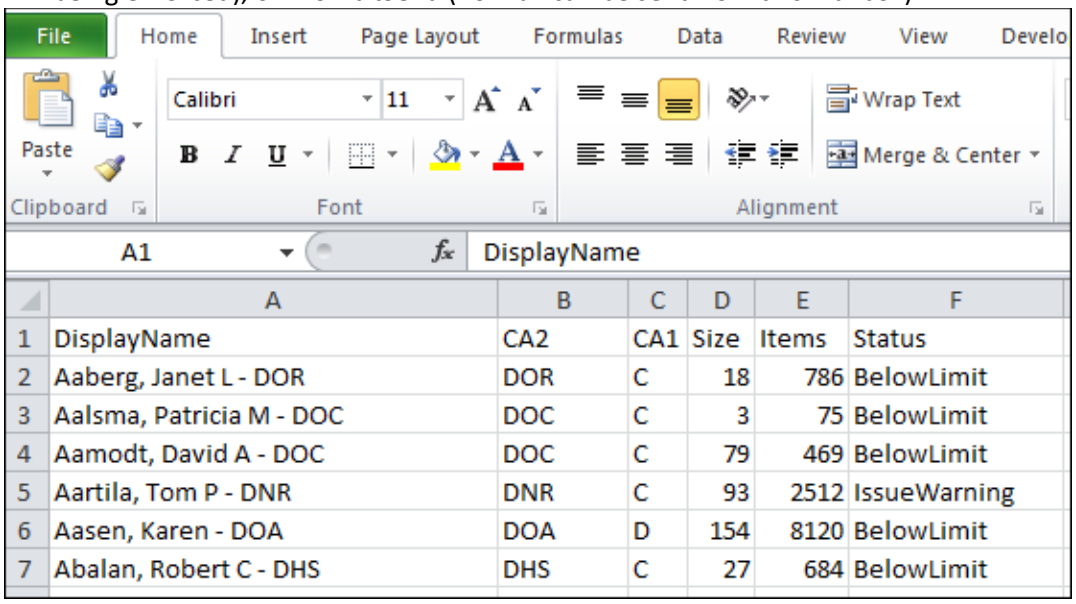
5. Right click on **MailboxSize.csv**.



6. Select SAVE TARGET As.... and download the report to your machine. Press the SAVE button.

7. Once the download is complete open the .CSV file with Excel.

8. A formatted report looking similar to the one below will be displayed. The report is sorted by name (lastname, firstname). Columns are Displayname (as in the GAL), agency associated with the email account (CA2), the mailbox class size (CA1), the size of the mailbox (in MBs), the number of items in the mailbox, and the status. The status can be BelowLimit (under the restricted mailbox size), IssueWarning (size warning email sent to mailbox owner), MailboxDisabled, NoChecking (no size limit being enforced), or ProhibitSend (no mail can be sent from this mailbox).



	A	B	C	D	E	F
1	DisplayName	CA2	CA1	Size	Items	Status
2	Aaberg, Janet L - DOR	DOR	C	18	786	BelowLimit
3	Aalsma, Patricia M - DOC	DOC	C	3	75	BelowLimit
4	Aamodt, David A - DOC	DOC	C	79	469	BelowLimit
5	Aartila, Tom P - DNR	DNR	C	93	2512	IssueWarning
6	Aasen, Karen - DOA	DOA	D	154	8120	BelowLimit
7	Abalan, Robert C - DHS	DHS	C	27	684	BelowLimit

SECTION 17. IAM USERID FIELD DESCRIPTIONS

Personal Tab

UMRA Fields	AD Attributes	
First Name	givenname	required
Middle Name	initials	required
Last Name	sn	required
Generation Qualifier	generationqualifier	
Name Resolution	wiNameresolution	
Employee Type	employeeType	required
Administrative Notes	Desciption	

Keys Tab

UMRA Fields	AD Attributes	
User Name	SamAccountName	required
Legacy Userid	wiLegacyUId	
Display Name	DisplayName	required
WIUID	wiUID	required
Location	wiContainer	required
Common Name	cn	required

Communication Tab

UMRA Fields	AD Attributes	
E-Mail	mail	required
Mail Type		required
Mailbox Size	extensionAttribute1	required
Hide from GAL	msExchHideFromAddressLists extensionAttribute2	
Web Mail Access	protocolSettings	
Mailbox Disabled	msExchHideFromAddressLists nDBOverHardQuotaLimit	
Legacy E-Mail	wiLegacyMail	
Phone #	telephoneNumber	
Extension	Appends to *telephoneNumber*	
Mobil Phone #	mobile	
Pager #	pager	
Fax #	facsimileTelephoneNumber	
Assist. Phone #	telephoneAssistant	

Location Tab

UMRA Fields	AD Attributes
Address	streetAddress
Address City	l
Address State	st

Address ZIP	postalCode	
Office	wiLocationOffice	
Location Street	wiMailAddrLine1	
Location City	wiLocationCity	
Location State	wiLocationState	
Location ZIP	wiLocationZip	

State Org Tab

UMRA Fields	AD Attributes	
Company Name	company	
Title	title	
Division	wiDivision	OU Dependant
Bureau	wiBureau	OU Dependant
Section	wiSection	OU Dependant
Unit	wiUnit	
Orgcode	wiOrgCode	
Department Name	department	Required
Department Abbreviation	wiDepartmentAbbrv	Required
Department Code	wiDepartmentCode	Required

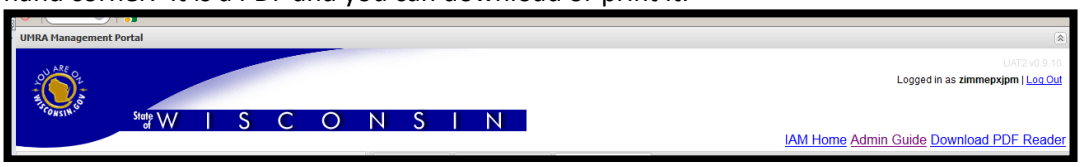
Other

UMRA Fields	AD Attributes	
SSRPM Activated	wiSSRPMEnrollDate	
Block	wiStatus	
Disable/Enable	UserAccountControl	Required
Lock/Unlock	UserAccountcontrol	Required
Password	userPassword	Required

SECTION 18. OTHER INFORMATION

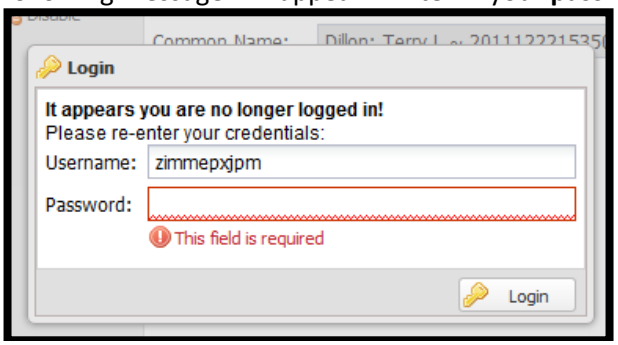
IAM Administrator Guide

A current copy of the IAM Administrator guide is available in UMRA in the upper right hand corner. It is a PDF and you can download or print it.

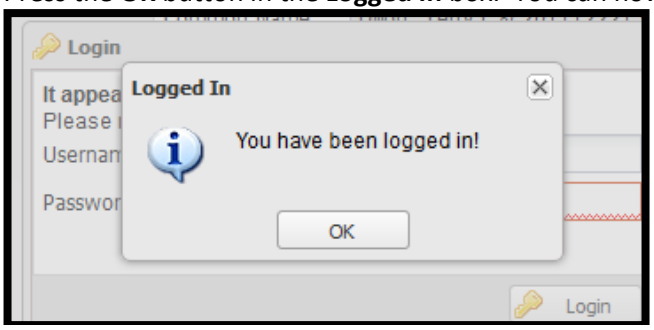


Session Timeout

A UMRA session will timeout in 20 minutes, but it will not automatically log you off. Your last window will stay open. When you come back and attempt to do something the following message will appear. Enter in your **password** and press the **Login** button.

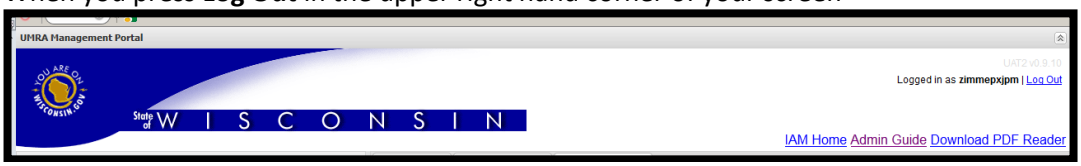


Press the **OK** button in the **Logged In** box. You can now continue working.

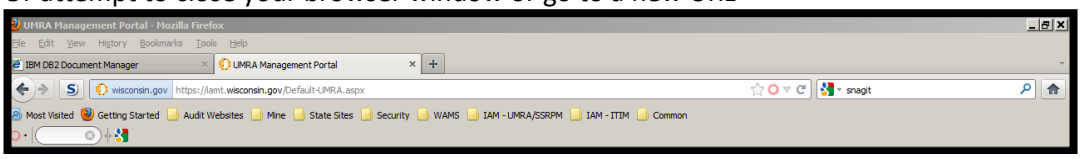


Session Log Out/Closing Your Browser

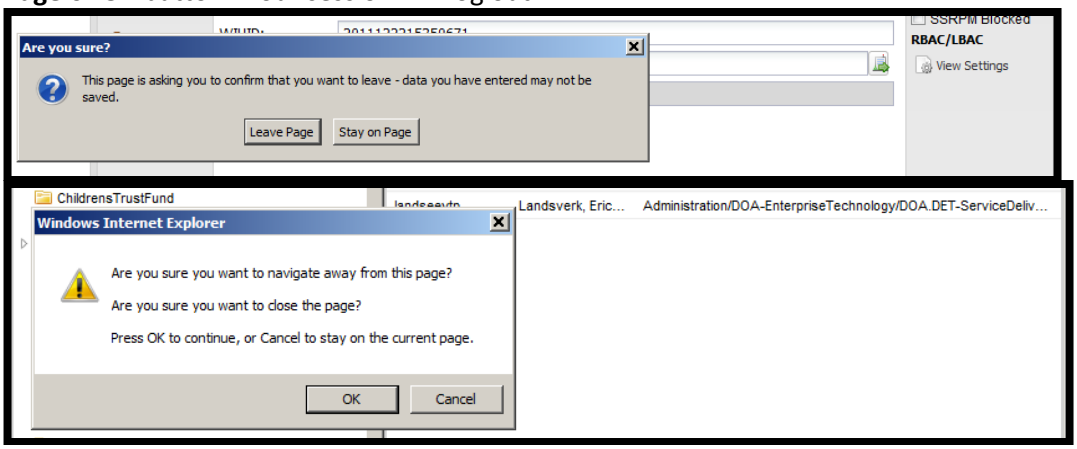
When you press **Log Out** in the upper right hand corner of your screen



Or attempt to close your browser window or go to a new URL

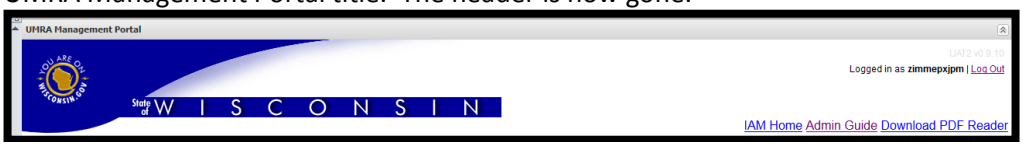


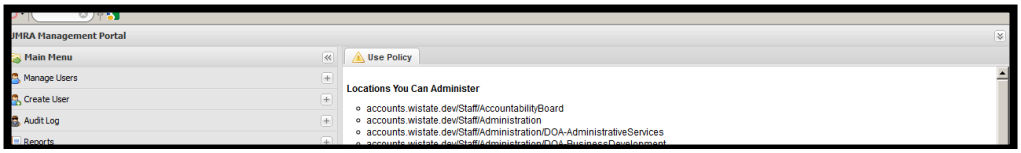
The **Are you sure?** or **Windows Internet Explorer** box will come up. Press the **Leave Page** or OK button. Your session will log out.



Header Drop Down

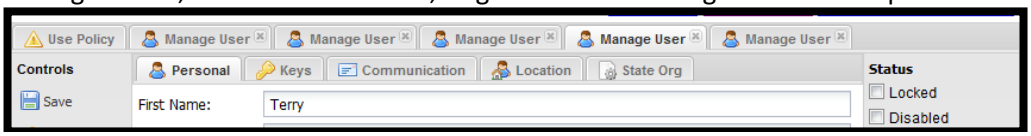
Some monitors have a shortage of screen space when working with UMRA. You can reduce the size of the UMRA panel by closing down the header. To do this press the button with two upward arrows in the upper right hand corner (directly across from the UMRA Management Portal title. The header is now gone.



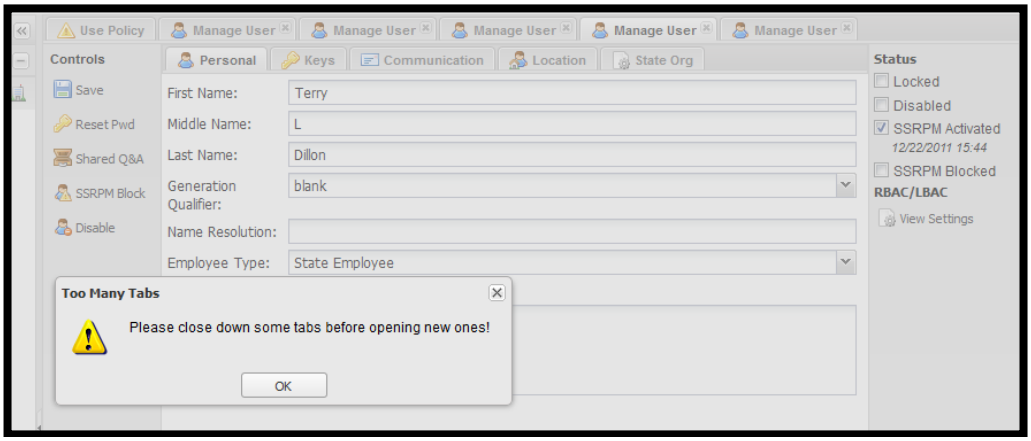


Tab Count Restriction

Near the top of the UMRA panel under the heading you will notice that each time you manage a user, create a new Userid, or go into the audit log a new tab is opened.



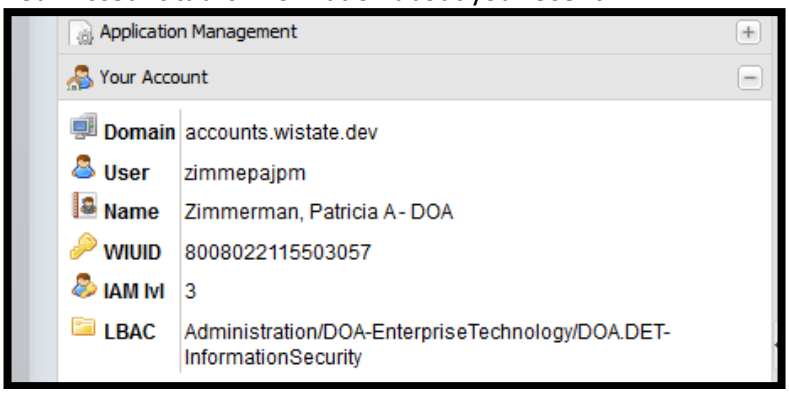
You are limited to a maximum of 5 tabs (not counting the **Use Policy** tab). When you perform an UMRA function that would open a 6th tab you will receive the error 'Please close down some tabs before opening new ones'. Press the **OK** button in the **Too Many Tabs** box to continue. Then close some of your tabs.



The reason for this restriction is that the number of open tabs has an impact your UMRA session performance.

Your Account Tab

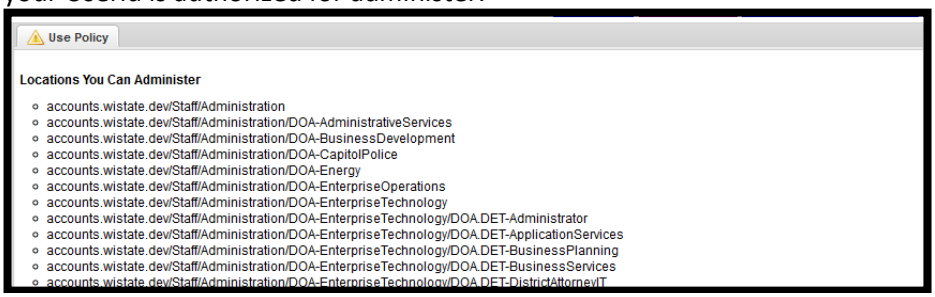
When you sign on to UMRA you will notice in the lower left side of the panel under the **Your Account** tab is information about your Userid.



You will see your **Domain**, **User** (Userid), **Name** (Display Name), and **WIUID**. The **IAM lvl** is the security role that your Userid is using. The **LBAC** is the location of your Userid in the tree.

Locations You Can Administer

When you sign on to UMRA under the **Use Policy** tab you will see a listing of OU's that your Userid is authorized for administer.



********** End of Manual **********