

2017

# IdM User Guide

UC MERCED OFFICE OF INFORMATION TECHNOLOGY

## Table of Contents

<b>Non-Administrative Functions .....</b>	<b>2</b>
Password Reset.....	2
Claim Your UCMNetID .....	4
<b>Administrative Functions.....</b>	<b>5</b>
Add/Create an Account .....	5
Add a Staff or Faculty Account .....	7
Add an Affiliate Account.....	10
Add a Service account .....	12
Search and Edit Accounts .....	12
Validate Accounts.....	14
View Dashboard / Edit Account.....	16

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The IdM Admin tool is used to create and manage UCMNetID accounts which allow access to UCM resources. Accounts are either created through the Payroll system feed to IDM, through the Banner SIS system feed to IdM, or manually by a designated Institutional Proprietor (in the case of staff and faculty).

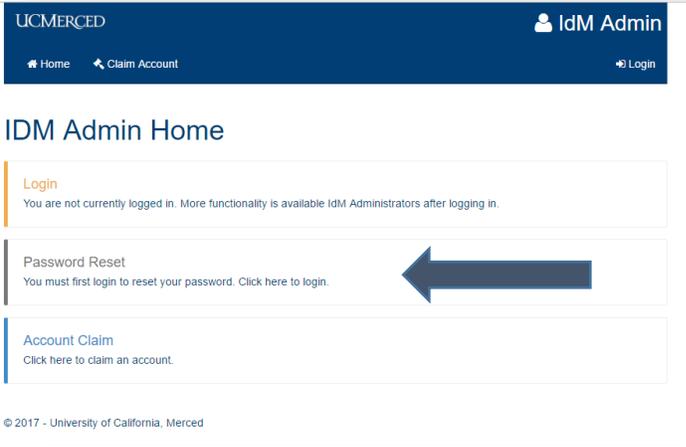
## Non-Administrative Functions

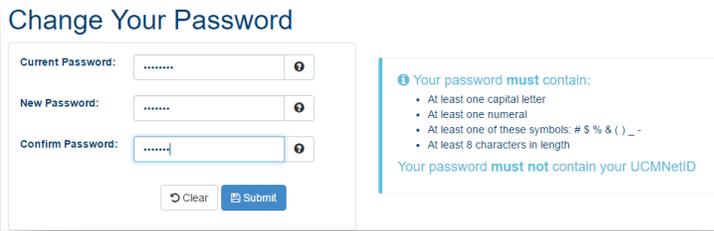
The following types of non-administrative actions can be within the IdM tool:

- Password Reset
- Claim an Account (once a department administrator has created it)

### Password Reset

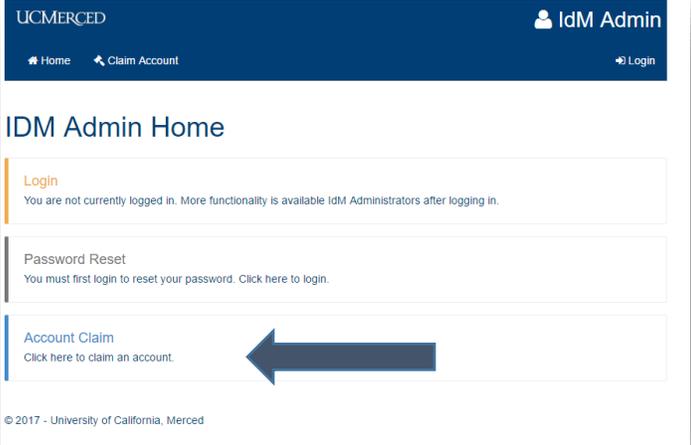
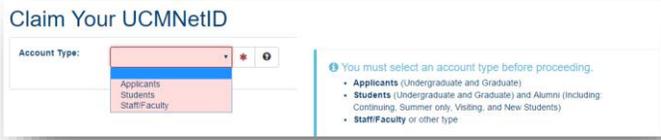
Individuals may reset their password at any time and are advised to do so upon any suspected security compromise. IDM Administrative Office and IT Help Desk also have the ability to change a user's password.

<b>Password Reset</b>	
<ol style="list-style-type: none"><li>1. Go to <a href="http://idm.ucmerced.edu">idm.ucmerced.edu</a></li><li>2. Select Password Reset</li></ol>	 <p>The screenshot shows the 'IDM Admin Home' interface. At the top, there is a dark blue header with 'UCMERCED' on the left, 'IdM Admin' with a user icon on the right, and navigation links for 'Home', 'Claim Account', and 'Login'. Below the header, the main content area has three sections: 'Login' (with a note that more functionality is available after logging in), 'Password Reset' (with a note that users must first login to reset their password), and 'Account Claim' (with a note to click here to claim an account). A large blue arrow points to the 'Password Reset' link. At the bottom, there is a copyright notice: '© 2017 - University of California, Merced'.</p>

<p><b>Password Reset</b></p>	
<p>3. Enter your UCMNETID and password</p> <p>4. Click Login</p>	
<p>The requirements for creating a password are listed on the page</p> <p>5. Complete the fields to Enter your current Password, New Password and Confirm Password</p> <p>6. Select Submit</p>	

## Claim Your UCMNetID

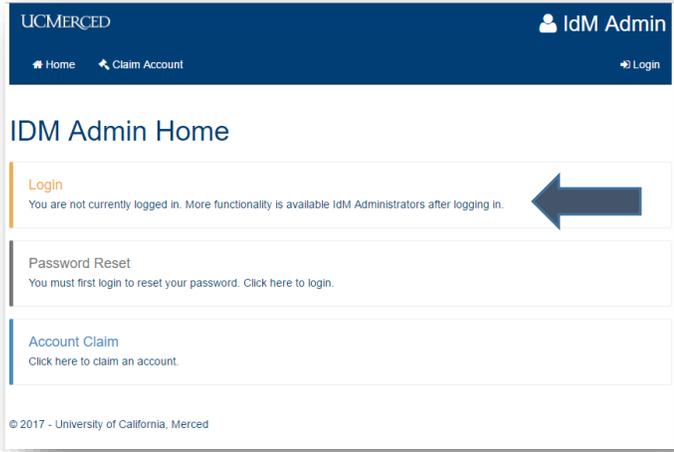
Individuals may claim their UCMNetID at any time

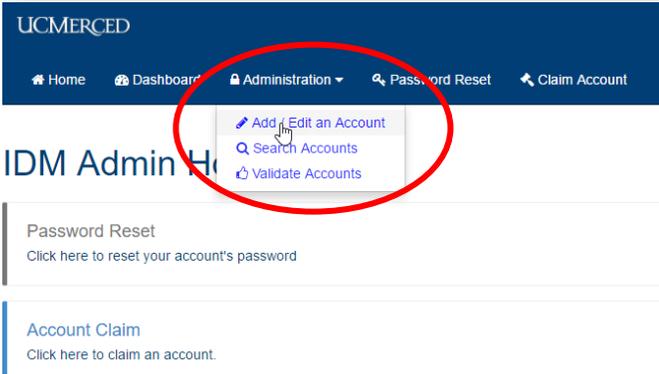
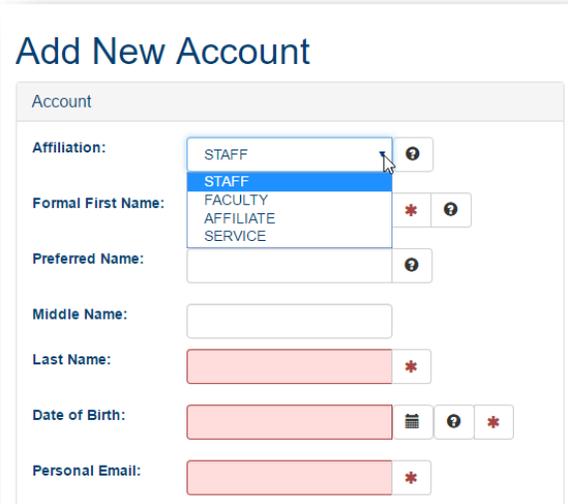
<p><b>Claim Your UCMNetID</b></p>	
<ol style="list-style-type: none"> <li>1. Go to <a href="http://idm.ucmerced.edu">idm.ucmerced.edu</a></li> <li>2. Select <b>Account Claim</b></li> </ol>	
<ol style="list-style-type: none"> <li>3. Select an <b>Account Type</b> <ol style="list-style-type: none"> <li>a. Applicants</li> <li>b. Students</li> <li>c. Staff / Faculty</li> </ol> </li> </ol>	
<ol style="list-style-type: none"> <li>4. Complete the fields to Enter your First Name and Last Name</li> <li>5. Enter your Claim Number OR</li> <li>6. Enter your personal email address if you have not received a Claim Number</li> <li>7. Select Submit</li> </ol>	

## Administrative Functions

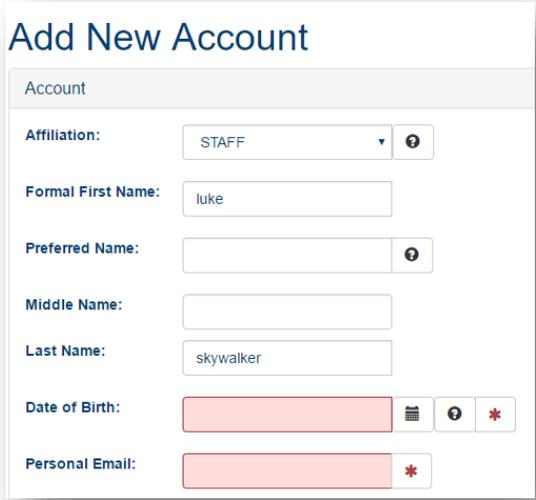
Individuals may reset their password at any time and are advised to do so upon any suspected security compromise. IDM Administrative Office and IT Help Desk also have the ability to change a user’s password.

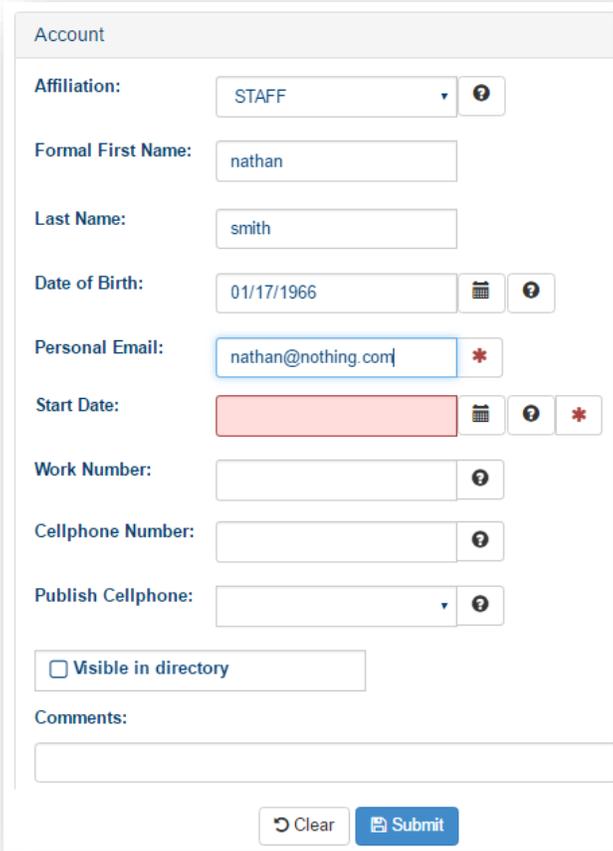
### Add/Create an Account

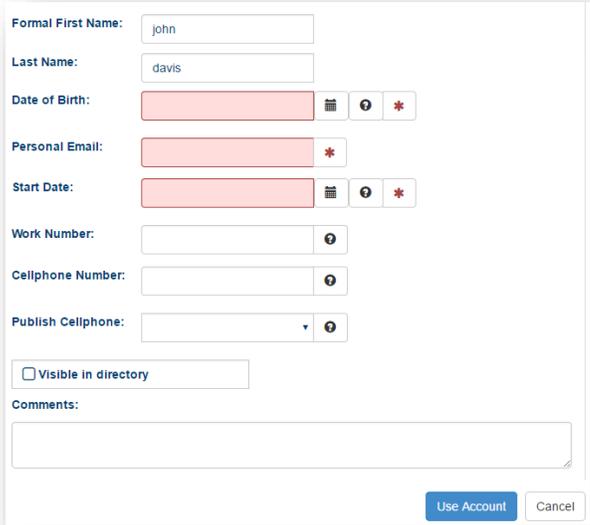
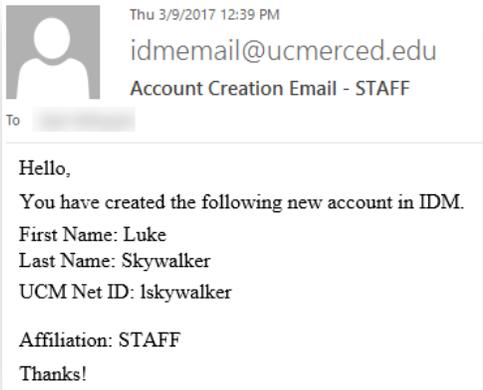
Add a New Account	
<ol style="list-style-type: none"> <li>1. Go to <a href="http://idm.ucmerced.edu">idm.ucmerced.edu</a></li> <li>2. Select Login</li> </ol>	
<ol style="list-style-type: none"> <li>3. Enter your UCMNETID and password</li> <li>4. Select Login</li> </ol>	

<b>Add a New Account</b>	
5. Select Add / Edit an Account under the Administration link	 <p>The screenshot shows the UC Merced IdM Administration interface. At the top, there is a navigation bar with links for Home, Dashboard, Administration, Password Reset, and Claim Account. The Administration dropdown menu is open, and the 'Add / Edit an Account' option is circled in red. Below the navigation bar, there are sections for 'Password Reset' and 'Account Claim'.</p>
6. Select the type of account to Add	 <p>The screenshot shows the 'Add New Account' form. The 'Affiliation' dropdown menu is open, showing options: STAFF, FACULTY, AFFILIATE, and SERVICE. The 'STAFF' option is selected. Other fields include 'Formal First Name', 'Preferred Name', 'Middle Name', 'Last Name', 'Date of Birth', and 'Personal Email'. Red asterisks indicate required fields.</p>

Add a Staff or Faculty Account

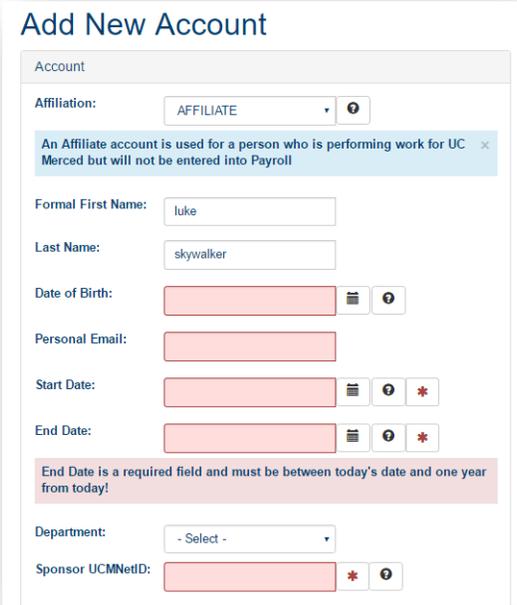
Add a Staff or Faculty Account							
<ol style="list-style-type: none"> <li>1. Enter <b>Formal First Name</b></li> <li>2. Enter <b>Last Name</b></li> </ol>							
<p><b>Note:</b> As you add information, the <b>Account Matching</b> tool will search the database for individual matches (this helps prevent duplicate accounts for the same individual)</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Affiliation</th> <th>UCMNetID</th> </tr> </thead> <tbody> <tr> <td>Luke Skywalker</td> <td>STAFF</td> <td>lskywalker</td> </tr> </tbody> </table>	Name	Affiliation	UCMNetID	Luke Skywalker	STAFF	lskywalker
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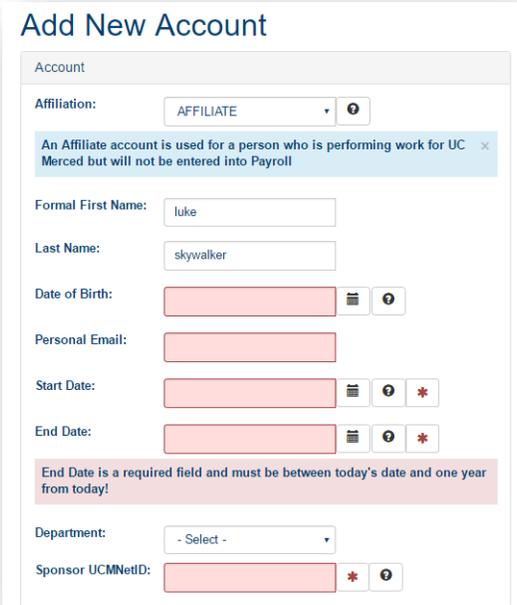
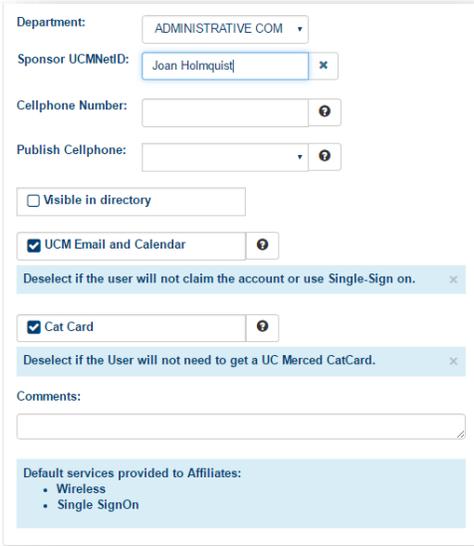
<b>Add a Staff or Faculty Account</b>																
<p>3. If there are no account matches, continue by completing all fields (Red fields are required).</p> <p>4. Select Submit</p>																
<p>OR</p> <p>If there are multiple matches, confirm the identity by completing the Date of Birth field.</p> <p>5. If the individual already has an account (UCMNetID), select the name under the <b>Account Matching</b> tool to the right of the Account field information</p>	 <table border="1"><thead><tr><th>Name</th><th>Affiliation</th><th>UCMNetID</th></tr></thead><tbody><tr><td>John Davis</td><td>applicant</td><td>jdavis25</td></tr><tr><td>John Davis</td><td>applicant</td><td>jdavis26</td></tr><tr><td>John Davis</td><td>applicant</td><td>jdavis27</td></tr><tr><td>John Davis</td><td>applicant</td><td>jdavis5</td></tr></tbody></table>	Name	Affiliation	UCMNetID	John Davis	applicant	jdavis25	John Davis	applicant	jdavis26	John Davis	applicant	jdavis27	John Davis	applicant	jdavis5
Name	Affiliation	UCMNetID														
John Davis	applicant	jdavis25														
John Davis	applicant	jdavis26														
John Davis	applicant	jdavis27														
John Davis	applicant	jdavis5														

<p><b>Add a Staff or Faculty Account</b></p>	
<p>6. Once you have selected the Staff or Faculty Account type, complete all fields (Red boxes are required).</p> <p>7. Select Use Account</p>	
<p>8. You will receive a confirmation email when a new account is created</p>	

Add an Affiliate Account

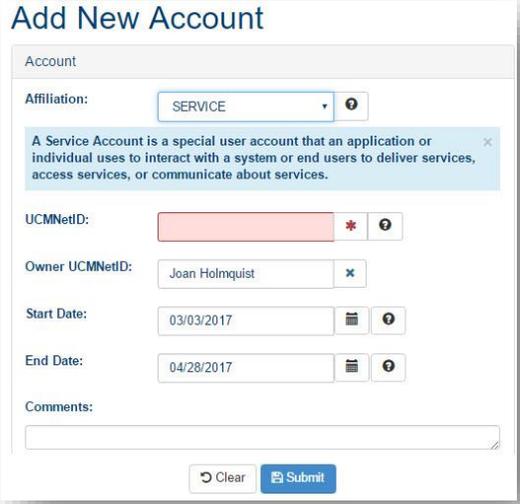
An Affiliate account is for a person who is performing work for UC Merced but will not be entered into the Payroll System

Add an Affiliate Account							
<p>1. Enter <b>Formal First Name</b></p> <p>2. Enter <b>Last Name</b></p>							
<p><b>Note:</b> As you add information, the <b>Account Matching</b> tool will search the database for individual matches (this helps prevent duplicate accounts for the same individual)</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Affiliation</th> <th>UCMNetID</th> </tr> </thead> <tbody> <tr> <td>Luke Skywalker</td> <td>STAFF</td> <td>lskywalker</td> </tr> </tbody> </table>	Name	Affiliation	UCMNetID	Luke Skywalker	STAFF	lskywalker
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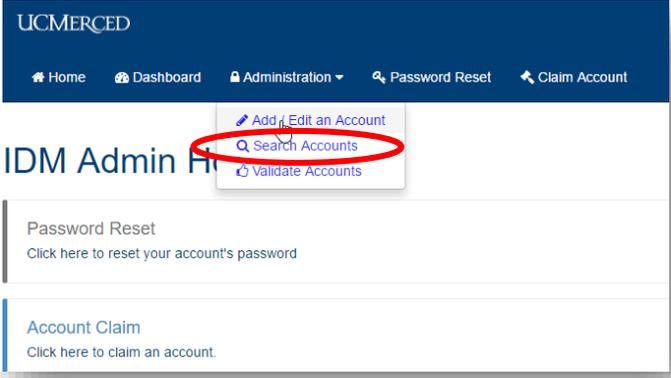
<p><b>Add an Affiliate Account</b></p>	
<p>3. If there are no account matches, continue by completing all fields (Red fields are required).</p> <ul style="list-style-type: none"> <li>• Affiliate accounts are set up for a maximum of one year and must be sponsored by a current UCM employee.</li> <li>• Accounts can be validated on an annual basis to continue access for the affiliate.</li> </ul>	
<p><b>Important:</b></p> <ul style="list-style-type: none"> <li>• <b>Default services provided to Affiliates include access to the wireless network and Single SignOn.</b></li> <li>• <b>Affiliates may not need specific campus resources such as a UCM email or calendar. Be sure to select <u>only</u> the resources necessary for the Affiliate.</b></li> </ul> <p>4. Select <b>Submit</b> when you have completed the form.</p> <p>The Affiliate, Sponsor and person creating the account will all receive confirmation emails.</p>	

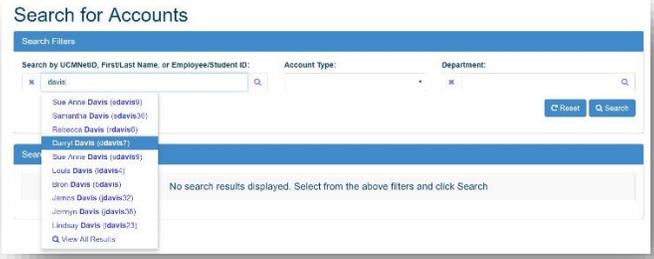
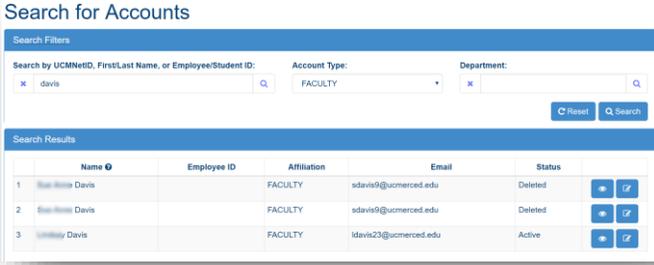
### Add a Service account

A Service Account is a special user account that an application or individual uses to interact with a system or end users to deliver services, access services, or communicate about services.

<b>Add a Service Account</b>	
<ol style="list-style-type: none"><li>1. Select the Service Affiliation</li><li>2. Enter the user's UCMNetID</li><li>3. Confirm the correct Owner name appears</li><li>4. Enter a start and end date</li><li>5. Select Submit</li></ol>	

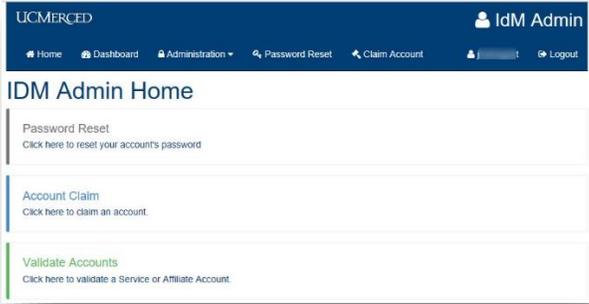
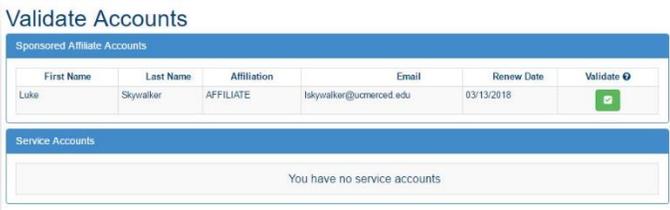
### Search and Edit Accounts

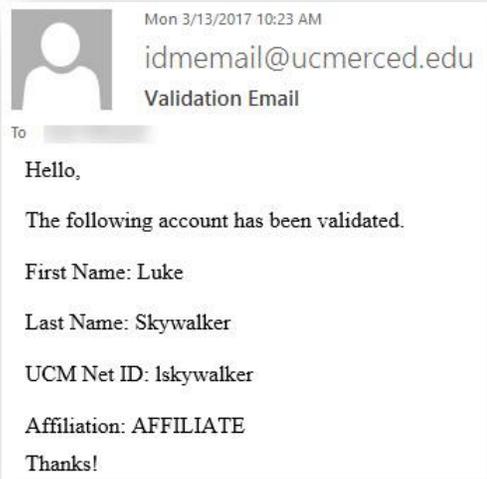
<b>Search and Edit Accounts</b>	
<ol style="list-style-type: none"><li>1. Select Search Accounts under the Administration link</li></ol>	

<b>Search and Edit Accounts</b>	
<p>2. Enter information to search by</p>	
<p>3. Use additional fields if multiple options are found to narrow the search</p>	
<p>4. To confirm the correct individual use the EYE icon to the right of the Status column</p>	
<p>5. If you have identified the correct individual, select the Edit icon to the right of the Status column</p>	

### Validate Accounts

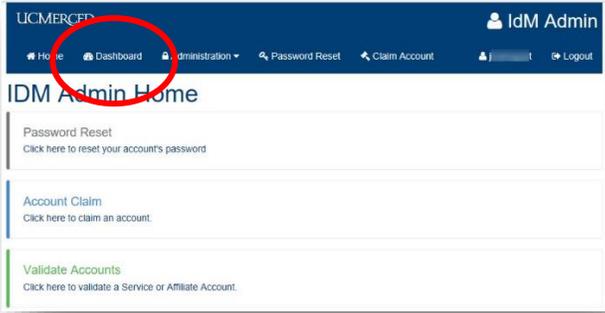
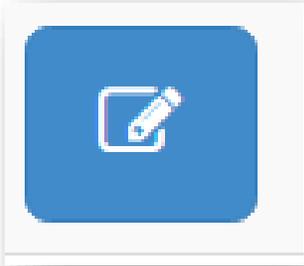
Service and Affiliate Accounts will need to be validated by the account Sponsor annually. The Affiliate and Sponsor will get 90, 60 and 30-day email notices to keep the account active. If the account End Date is reached without the account being validated, the account (and access to UCM resources granted through the account) will be terminated.

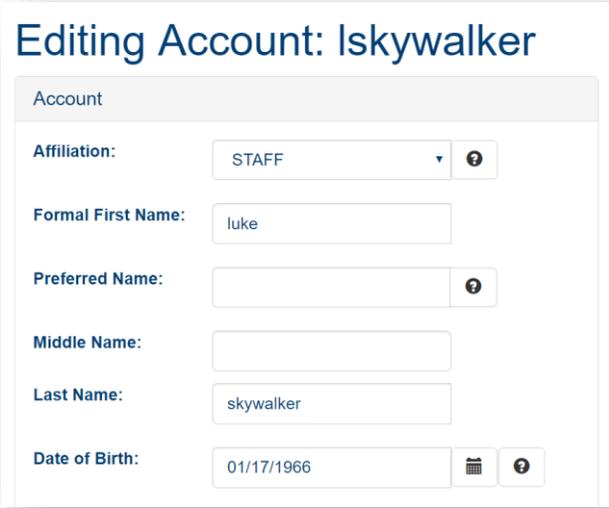
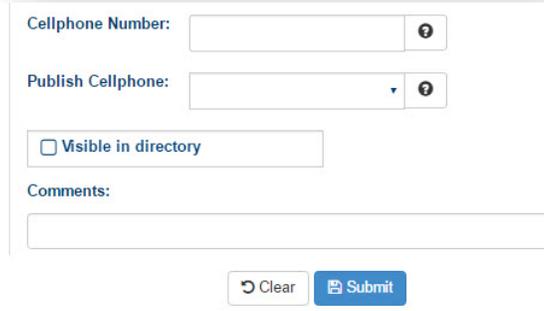
Validate Accounts	
<p>1. Select Validate Accounts from the Home Page or under the Administration Link</p>	 <p>The screenshot shows the 'IDM Admin Home' page with a navigation bar at the top containing 'Home', 'Dashboard', 'Administration', 'Password Reset', 'Claim Account', and 'Logout'. Below the navigation bar, there are three main sections: 'Password Reset' with a link to reset the password, 'Account Claim' with a link to claim an account, and 'Validate Accounts' with a link to validate a Service or Affiliate Account.</p>
<p>2. The Affiliate or Service Accounts will appear, select Validate to change / edit the account end date.</p>	 <p>The screenshot shows the 'Validate Accounts' page with a table titled 'Sponsored Affiliate Accounts'. The table has columns for First Name, Last Name, Affiliation, Email, Renew Date, and a Validate button. One account is listed for Luke Skywalker, affiliated with AFFILIATE, with email lskywalker@ucmerced.edu and a renew date of 03/13/2018. Below the table, there is a section for 'Service Accounts' which states 'You have no service accounts'.</p>
<p>3. Confirm the re-validation date by selecting Yes</p>	 <p>The screenshot shows a confirmation dialog box titled 'Validate this account for another 12 months?'. It displays account details: First Name (Luke), Last Name (Skywalker), Email (lskywalker@ucmerced.edu), Affiliation (AFFILIATE), Renew Date (03/31/2017), and Account ID (4993298391941394). At the bottom, there are three buttons: 'No', 'Yes', and 'Close'.</p>

<b>Validate Accounts</b>	
<p>4. A confirmation email will be sent to the person validating the account and the Affiliate or Service account holder</p>	 <p>The screenshot shows an email interface with the following content:</p> <ul style="list-style-type: none"><li>Sender: idmemail@ucmerced.edu</li><li>Subject: Validation Email</li><li>To: [Redacted]</li><li>Body: Hello, The following account has been validated. First Name: Luke, Last Name: Skywalker, UCM Net ID: lskywalker, Affiliation: AFFILIATE, Thanks!</li></ul>

### View Dashboard / Edit Account

The IDM Admin Dashboard will allow departmental account owners to view created and modified accounts. Users can also edit accounts from the IDM Admin Dashboard

View Dashboard / Edit Account																													
<p>1. Select the Dashboard link at the top of the Home Page</p>																													
<p>2. Newly create accounts and recently modified accounts will be listed separately</p>	 <table border="1"><caption>Recently Created Accounts</caption><thead><tr><th>First Name</th><th>Last Name</th><th>Employee ID</th><th>Account Type</th><th>Email</th><th>Created Date</th><th></th></tr></thead><tbody><tr><td>luke</td><td>skywalker</td><td></td><td>AFFILIATE</td><td>lskywalker@ucmerced.edu</td><td>03/10/2017 16:55:38</td><td></td></tr></tbody></table> <table border="1"><caption>Recently Modified Accounts</caption><thead><tr><th>First Name</th><th>Last Name</th><th>Employee ID</th><th>Account Type</th><th>Email</th><th>Updated Date</th><th></th></tr></thead><tbody><tr><td>luke</td><td>skywalker</td><td></td><td>AFFILIATE</td><td>lskywalker@ucmerced.edu</td><td>03/10/2017 16:55:38</td><td></td></tr></tbody></table>	First Name	Last Name	Employee ID	Account Type	Email	Created Date		luke	skywalker		AFFILIATE	lskywalker@ucmerced.edu	03/10/2017 16:55:38		First Name	Last Name	Employee ID	Account Type	Email	Updated Date		luke	skywalker		AFFILIATE	lskywalker@ucmerced.edu	03/10/2017 16:55:38	
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luke	skywalker		AFFILIATE	lskywalker@ucmerced.edu	03/10/2017 16:55:38																								
<p>3. Use the Edit icon next to any account to edit the account information</p>																													

<p><b>View Dashboard / Edit Account</b></p>	
<p>4. Edit the necessary account information</p>	 <p><b>Editing Account: Iskywalker</b></p> <p>Account</p> <p>Affiliation: STAFF</p> <p>Formal First Name: luke</p> <p>Preferred Name:</p> <p>Middle Name:</p> <p>Last Name: skywalker</p> <p>Date of Birth: 01/17/1966</p>
<p>5. Select Submit at the bottom of the screen</p>	 <p>Cellphone Number:</p> <p>Publish Cellphone:</p> <p><input type="checkbox"/> Visible in directory</p> <p>Comments:</p> <p>Clear Submit</p>