OrgChart

Quick Start Guide

Contents

About this document 1

1.1 This document

This document is intended as a guide for setting up *Hitachi ID Bravura Identity* for testing or demonstration purposes. It includes instructions and examples for the most common cases.

If you have not yet installed *Hitachi ID Bravura Security Fabric* please use the "Installation Quick Start Guide" (installation-quickstart.pdf) for test or demonstration installations, or the *Bravura Security Fabric Documentation* for full deployment.

This document assumes that you have set up at least one target system and loaded users into the database. If not, please see the task document or the full *Bravura Security Fabric* Documentation

When planning a major deployment, it is recommended that you read the *Bravura Security Fabric* Documentation .

1.2 Conventions

This document uses the following conventions:

This information . . .	displayed in . . .
Variable text (substituted for your own text)	$<$*angle brackets*$>$
Non-text keystrokes – for example, **[Enter]** key on a keyboard.	**[brackets]**
Terms unique to *Hitachi ID Bravura Security Fabric*	*italics*
Button names, text fields, and menu items	**boldface**
Web pages (names)	***italics and boldface***
Literal text, as typed into configuration files, batch files, command prompts, and data entry fields	`monospace font`
Wrapped lines of literal text (indicated by the $\rightarrow$ character)	`Write this string as a` `→single line of text.`
Hypertext links – click the link to jump to a section in this document or a web site	Purple text
External document – click the link to jump to a section in another document. The links only work if the documents are kept in the relative directory path.	Magenta text

1.3 Feedback and help

If you have feedback about this document or wish to report an omission or error, please contact doc-feedback@Hitachi-ID.com.

If you require technical assistance with *Hitachi ID Bravura Identity*, contact support@Hitachi-ID.com.

About Organization Chart Management

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2

</div>

In general, organization chart data represents how authority and responsibility is distributed within an organization. Organization chart data supports such processes as:

- **Request Authorization Workflow**

  Managers can be asked to approve changes in access privileges for their subordinates.

- **Automated Escalation**

  When managers or application owners fail to respond to a request to authorize access changes, their managers may be asked to respond in their place.

- **Access Certification**

  Managers may be periodically required to review a list of their direct subordinates and their respective access rights. This process can identify and remove stale accounts and privileges that do not represent current business needs. Periodic audits are essential for compliance with privacy and corporate governance legislation.
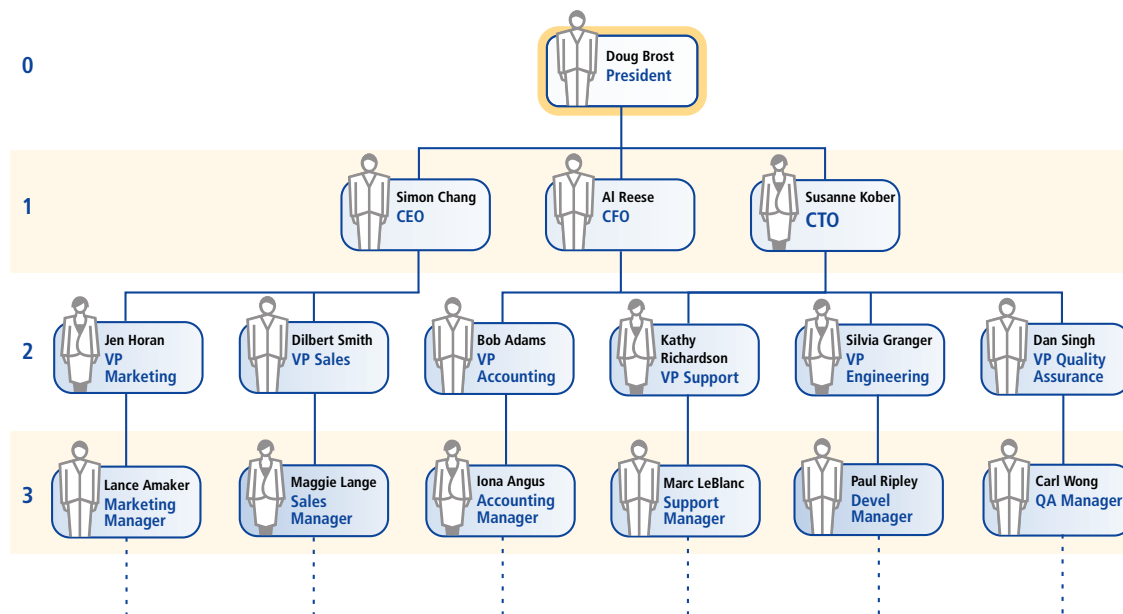

Figure 2.1: An identity management system using organization chart data

See also:

- Selecting authorizers using a plugin to learn how organization chart data is used to select appropriate authorizers for a request.

- About escalation to learn how organization chart data is used in escalating requests.

2.1 Maintaining organization chart data with *Bravura Identity*

Hitachi ID Bravura Identity includes a system for constructing and maintaining comprehensive organization chart data, for employees, contractors, and vendors, across an enterprise-scale organization. It is designed to support identity management system deployment and operation.

The *Bravura Identity* representation of an organization chart, referred to as the *OrgChart*, identifies the primary manager or supervisor for every person in an organization. While many people have "dotted line" relationships with multiple managers, in most organizations every person has a primary manager, with authority to review access rights, to terminate the employee or contractor, and to review performance and pay.

When you first install *Bravura Identity*, the OrgChart contains no data and must be built from scratch. The *Bravura Identity* administrator is responsible for initializing either a manual construction process, where OrgChart information is entered using the *Bravura Identity* interface; or an automatic construction process, where preliminary OrgChart data is imported from an existing HR system.

The work of building and updating the OrgChart is distributed among managers. By distributing the work of maintaining OrgChart data to every manager in an organization, this information can be collected and maintained more quickly, more reliably, and less expensively than using a centralized process.

OrgChart maintenance works as follows:

Manual OrgChart construction

1. The *Hitachi ID Bravura Identity* administrator configures target systems, email settings, and other options for OrgChart maintenance.

2. *Bravura Identity* gathers an inventory of users from target systems during auto discovery.

3. An *Bravura Identity* administrator (a product administrator) logs into the *Manage the OrgChart* (IDG) module and identifies the top-level manager in the organization, also known as the "root node".

4. The *Bravura Identity* administrator identifies the top-level manager's subordinates until enough levels of the OrgChart have been created to begin the construction process.

5. Product administrators continue to identify subordinates, or managers log into the *Browse the OrgChart* (IDO) module to identify their own subordinates, and to indicate which of their subordinates are managers.

6. *Bravura Identity* invites managers identified in Step 5 to log into *Bravura Identity* and identify their own subordinates.

   The process continues until all managers' lists are complete.

Automatic OrgChart construction

1. The *Hitachi ID Bravura Identity* administrator configures target systems, account attribute mappings, email settings, and other options for OrgChart maintenance.

2. During auto discovery, *Bravura Identity* gathers an inventory of users from target systems. *Bravura Identity* examines users' attribute values to build the initial OrgChart from pre-existing data.

3. The *Bravura Identity* administrator logs into the *Manage the OrgChart* (IDG) module, then verifies and corrects some or all of the imported data himself.

   Managers could also log into the *Browse the OrgChart* (IDO) module to identify their own subordinates, and to indicate which of their subordinates are managers.

Implementing Organization Chart Management

3

3.1 Configuring basic requirements

Configure the following to set up organization chart maintenance with *Hitachi ID Bravura Identity*.

1. *Optional:* Account attribute mapping for automatic OrgChart construction and propagation

   If you want *Bravura Identity* to build the initial OrgChart automatically, or if you want it to propagate changes to target systems when the OrgChart is updated, you must configure an appropriate target attribute.

   See Mapping attributes for organization chart management for details.

2. Product administrators

   Create an administrator to oversee and manage OrgChart construction. The administrator must be a product administrator with the right to "Manage the Orgchart".

   See Creating an OrgChart manager for details.

3.2 Mapping attributes for organization chart management

The term *account attributes* refers to the attributes of user accounts on target systems. There are also special account attributes, called *pseudo-attributes*, that exist only in *Hitachi ID Bravura Identity*. They are used to compose values or set flags on a target system. Each target system type has a different list of account attributes.

Bravura Identity includes a "catalog" of shipped default attributes for each target system type. *Bravura Identity* uses the attribute catalog to determine rules for "handling" each attribute when managing users on a target system. The catalog also determines which attributes' values should be loaded during auto discovery.

Bravura Identity enables you to override the default rules for handling account attributes. Using the *Manage the system* (PSA) module you can:

- Control how accounts are created, updated, or deleted
- Determine which attributes to load during auto discovery
- Add new attributes
- Map account attributes to profile and request attributes

To illustrate how attribute mapping can be used, this chapter shows you how to map an account attribute to a profile attribute in order to build OrgChart data. This data can be used to escalate workflow requests or configure certification campaigns.

3.3 Mapping attributes for organization chart management

To illustrate how attribute mapping can be used, this section shows you how to map an account attribute to a profile attribute in order to build OrgChart data. This data can be used to escalate workflow requests or configure certification campaigns.

Map an account attribute mapping if you want *Hitachi ID Bravura Identity* to:

- Build the initial OrgChart automatically

- Propagate changes to target systems when the OrgChart is updated

The account attribute that you configure must contain the long ID of the user's primary manager. *Bravura Identity* uses the built-in ORGCHART_MANAGER profile/request attribute to determine each user's primary manager. The attribute can also be used to directly update a user's primary manager. Ensure that your "manager" account attribute is configured to be loaded during auto discovery.

> **CAUTION:** *Bravura Identity* allows exactly one OrgChart. If *Bravura Identity* detects multiple trees in your pre-existing data, it uses the largest tree as the basis for your OrgChart.
>
> If there are multiple trees with the same size, then *Bravura Identity* chooses the tree with the greatest depth. Finally, if there are multiple trees with equal depth, then it chooses the first tree that it encountered.

If you want *Bravura Identity* to propagate OrgChart changes to target systems, ensure that your "manager" account attribute can be set.

> **CAUTION:** After the initial OrgChart has been imported, if *Bravura Identity* is still set up to load the "manager" account attribute, but is not set up to propagate OrgChart changes back to the target system, any changes made to the OrgChart using *Bravura Identity* will be overwritten during the next auto discovery.

To configure an Microsoft Active Directory or LDAP Directory Service account attribute for OrgChart management:

1. Click **Resources → Account attributes → Target system**, then select the appropriate target.
   Alternatively, you can configure account attributes at the target type level.

2. Click the **Defaults** tab.

3. Override the default account attribute configuration. To do this, for an:

- LDAP Directory Service target, select ▸ the `manager` attribute.
- Active Directory target, select ▸ the `manager` attribute.

Click **Override**.

4. Ensure that the **Map account attribute to profile/request attribute** option is set to `ORGCHART_MANAGER`.

5. Select the **Load attribute values from target system** checkbox if you want *Bravura Identity* to import OrgChart data from the target system.

6. Set **Action when creating account** to "Set to specified value". This means the value will be set by the ORGCHART_MANAGER profile attribute.

7. Select an appropriate action from the **Action when updating account** drop-down list.

   If you do *not* want *Bravura Identity* to propagate OrgChart changes to the target system, select **Do not set this attribute**.

8. Click **Add**.

9. If *Bravura Identity* prompts you to confirm changes to attribute mappings:

   (a) Click **Yes** (recommended).
   (b) Run auto discovery (**Maintenance** → **Auto discovery** → **Execute auto discovery**).

See Implementing Organization Chart Management for more information about organization chart management.

3.4 Creating an OrgChart manager

This section demonstrates how to set up an existing *Bravura Identity* user as an OrgChart manager:

1. Click **Manage the system** → **Security** → **Access to product features** → **Individual administrators**

2. Click **Add new . . .** .

3. In the **ID** field, search for, or type the profile ID of an existing user.

4. Select **The user has the following selected access controls** then select "Manage the OrgChart" from the list of rights.

5. Click **Add** at the bottom of the form.

See Product administrators for more detail on product administrators.

3.5 Configuring OrgChart management options

You can extend OrgChart management functionality by configuring options for the following:

1. Web modules

   Configure the following modules as required:

Manage the OrgChart (IDG)	Product administrators use the *Manage the OrgChart* (IDG) module to build and administer users in an OrgChart.
Browse the OrgChart (IDO)	Managers use the *Browse the OrgChart* (IDO) module to manage their subordinates in an OrgChart.

2. **Manage the system** → **Workflow** → **Options** → **OrgChart** options

   Configure workflow options as required.

See the *Bravura Security Fabric* Documentation for details.

Managing the OrgChart (Administration)

4

This chapter details how to create and maintain the OrgChart as a product administrator.

The *Hitachi ID Bravura Identity* OrgChart construction process either begins with:

- A list of users and no data about their relationships.

  In this case, the organizational relationships must be identified and configured. You must identify the top-level manager, then either manually identify relationships, or start an Org building round.

- A list of users with their organizational relationships already defined.

  In this case, the organizational information was already defined on the target system and has been imported into *Bravura Identity*. The process in this case will consist of verifying the organizational data and adjusting it if necessary.

The following terms are important in this chapter:

Manager In the OrgChart, this is a user who has subordinates.

Subordinate This is a user who reports to another user.

Top-level manager This manager is the root of the OrgChart, and does not report to anyone.

Org building round This is a server-driven process that invites managers to name their subordinates in a top-down sequence. Managers login to *Bravura Identity* to identify their subordinates and which of them are managers themselves. The process cascades down until all levels of management have been involved. You can start Org building rounds to initially build the OrgChart, or to periodically verify data.

This chapter shows you how to:
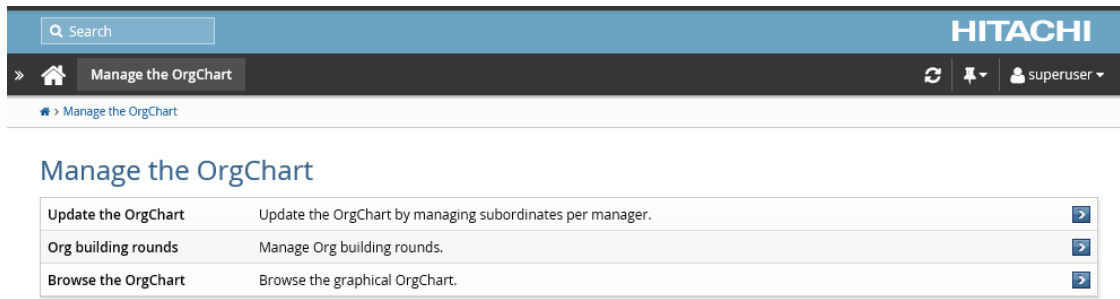
4.1   Starting with no data

If you import initial organization chart data from a target system or other source, the top manager should already be defined. If you are beginning with no relationship data, you must begin OrgChart construction by identifying the top-level manager.

The following security privileges control access to the *Manage the OrgChart* (IDG) module:

- Product administrators with the "Manage the OrgChart" administrative privilege can update the OrgChart and view the OrgChart structure.

- Product administrator with the "Start Org building rounds" administrative privilege can initiate OrgChart-building rounds and invite managers to update their list of subordinates.

This section shows you how to build the initial OrgChart by:

- Starting an Org building round (p11)
- Identifying subordinates (p12)

4.1.1   Starting with an Org building round

To identify the top-level manager and start an Org building round:

1. Click **Manage the OrgChart**.

2. Click **Update the OrgChart**.

3. Browse or search the list of users, then select ▶ the user you want to make the top-level manager. *Bravura Identity* displays the **Subordinates [<User>]** page.

4. Click **Start** to begin an Org building round.

   The ***Initiate Org building round*** page loads, and indicates that the top-level manager will be invited to login and identify his subordinates.

5. Click **Continue**.

6. Optionally, update the values for:

   • OrgChart round description
   • Segment description

   If you make changes, click **Update**.

7. Click **Continue**.

   Hitachi ID Bravura Identity displays a summary of the descriptions.

8. Click **Submit**.

   Bravura Identity notifies the top-level manager to start the process.

4.1.2   Starting by identifying subordinates

1. Click **Manage the OrgChart**.

2. Click **Update the OrgChart**.

3. Browse or search the list of users, then select ▶ the user you want to make the top-level manager.
   Hitachi ID Bravura Identity displays the ***Subordinates [<User>]*** page.

4. Click **Attach subordinates**.

5. Browse or search the list to find the users who report to the manager.

6. Select the appropriate checkbox for each user you want to add to the manager's list.

7. Click **Attach subordinates**.

   Bravura Identity displays the top manager's list of subordinates.

8. You can now attach the next level of subordinates by clicking the display icon 🔍 in the user's **Subordinates** column.

9. Continue this process until you have built the OrgChart to the level that you want.

Next:

You can now:

- to continue building, or to verify data

4.2   Changing the top-level manager

You can change the top level manager at any time; for example if the CEO is replaced or in the case of a merger.

You must be a product administrator with the "Manage the OrgChart" administrative privilege.

To change the top-level manager:

1. Click **Manage the OrgChart**.

   Hitachi ID Bravura Identity displays the **Browse the Orgchart** page with the top level manager selected, with direct subordinates below. Users who have subordinates are identified with a manager icon 👤.

2. To see other menu options available to product administrators in the *Manage the OrgChart* (IDG) module, click **Manage the OrgChart** in the navigation bar.
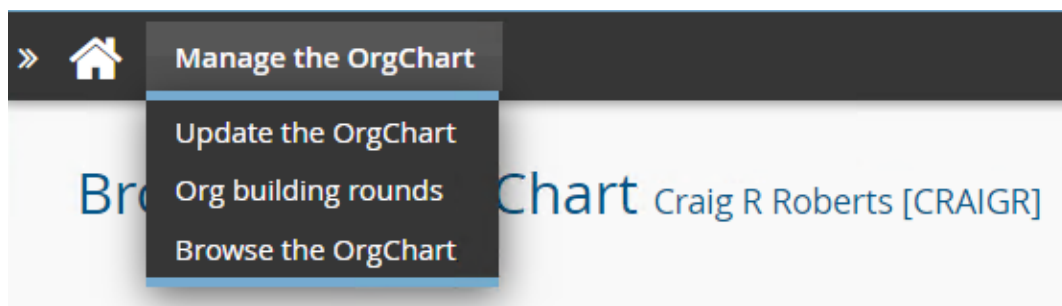
   Bravura Identity displays options to update the OrgChart or start org building rounds.

3. Click **Update the OrgChart**.

4. Browse or search the list of managers, then select ➤ the current top-level manager.

5. Click **Change top manager** .

6. Click the appropriate button to:

   - Replace the top manager with another user who is not currently in the OrgChart.
   - Swap the top manager with another manager in the OrgChart.
   - Attach the top manager to another user who is not currently in the OrgChart, and that user will become the new top manager.
     In other words, the current top manager becomes the subordinate of the new top manager.
   - Remove the top manager from the OrgChart.
     You can only do this if the top-level manager has no subordinates.

7. Browse or search the list of users, then select the user you want to make the top-level manager.

Next:

You can now:

4.3 Updating the OrgChart

This section shows you how to carry out OrgChart maintenance tasks as a product administrator.

You must be a product administrator with the "Manage the OrgChart" capability.

4.3.1 Getting started

To update the OrgChart, select the manager you want to start with:

1. Click **Manage the OrgChart**.

   Hitachi ID Bravura Identity displays the **Browse the Orgchart** page with the top level manager selected, with direct subordinates below. Users who have subordinates are identified with a manager icon 👥.

2. To see other menu options available to product administrators in the *Manage the OrgChart* (IDG) module, click **Manage the OrgChart** *in the breadcrumb links*.

   Bravura Identity displays options to update the OrgChart or start org building rounds.
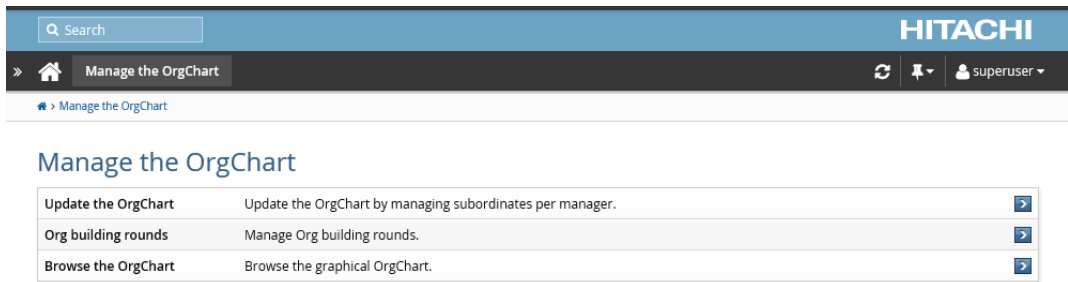
3. Click **Update the OrgChart**.

4. Browse or search the list of managers, then select ➤ the manager whose portion of the OrgChart you want to update.

   On this page, you can select a different manager at any time by clicking the display icon 🔍 next to a user in the list of subordinates, or next to the user that the selected manager reports to.

Subordinates Christopher Anderson [andersch]

| Attach subordinates | Change top manager |

	Name	Subordinates	Status
☐	Chet Baker (chet)	(0) 🔍	
☐	Clark Mason (clarkm)	(3) 🔍	
☐	Elena Yin (elena)	(1) 🔍	
☐	Joe Brown (joe)	(2) 🔍	
☐	Phil Simon (phil)	(3) 🔍	
		Transfer Detach	

Invite this manager to update their subordinates.

| Start |

4.3.2 Attaching subordinates

The process of identifying users as subordinates of a manager is called "attaching" subordinates.

To attach subordinates:

1. Select the manager (p15) whose list of subordinates you want to update.

2. Click **Attach subordinates**.

3. Browse or search the list to find the users who report to the manager.

   You can also click 'Show all users' on the top right to view users that already have a manager. If those users are selected, a transfer request will be submitted.

4. Select the appropriate checkbox for each user you want to add to the manager's list.

5. Click **Attach subordinates**.

4.3.3 Detaching subordinates

Detach a subordinate from the manager's list if *all* of the following conditions are true:

- The user does not report directly to the manager.

- The user still works for the organization.

  If the user no longer works for the organization, you should use *Hitachi ID Bravura Identity* to remove that user's access.

- The manager for the user is not known.

  If the manager for the user is known, you should transfer the user to that manager. See Transferring subordinates for details.

To detach subordinates from a manager's list:

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1. Select the subordinates then click **Detach**.

   If any of the subordinates that you want to detach are also managers with subordinates, *Bravura Identity* displays a list of subordinates that will be affected by the operation.

2. Depending on module configuration you can then select:

   - **Detach all affected subordinates**. Confirm the action.
   - **Find new managers**.
     Proceed to Step 4 in Transferring subordinates.

4.3.4 Transferring subordinates

To transfer subordinates to a new manager:

1. Select the subordinates on the ***Subordinates [<Manager>]*** page, then click **Transfer**.

2. Type a reason for the transfer.
   The text is displayed in ***Request status*** and authorization pages.

3. Click **Find new managers** to continue.

4. Select the subordinates to transfer, and select a new manager from the drop-down list. The drop-down list contains the following users:

   - The direct manager of the old manager
   - Other subordinates of the direct manager
   - Other subordinates of the old manager

   Alternatively, use the search function to select from all users in the OrgChart; including users who currently do not have any subordinates.

   You can also specify a reason for transferring each subordinate.

5. Click **Assign ...** to view the transfers.

6. Repeat Steps 4-5 until you've reassigned all the subordinates to their new managers.

7. Click **Confirm** to transfer the subordinate(s).

4.4   Managing Org building rounds

An Org building round is a server-driven process that invites managers to name their subordinates in a top-down sequence. You start the process by identifying a level of management. *Org Manager* emails managers and invites them to to create, modify, and verify the OrgChart data. The process cascades down to the next level until all levels of management have been involved. The end result is a verified OrgChart that has been signed off by all the managers participating in the process.

After the OrgChart has been defined you should continue to maintain it by periodically reviewing/validating either the OrgChart itself or sections of it. This is especially applicable for sections of your organization that are experiencing high growth, turnover, or have been reduced by layoffs. You can carry out multiple Org building rounds on different sections of the organization at the same time, as long as those sections of the organization do not overlap each other.

You must be a product administrator with the "Start Org building rounds" capability.

4.4.1   Starting an Org building round

To start an Org building round:

1. Click **Manage the OrgChart** → **Org building rounds** → **Add new...**.

   Or,

   Click **Manage the OrgChart** → **Update the OrgChart**.

2. Select ▶ the manager with which you want to start the Org building round.

3. Click **Start**.

   The ***Initiate Org building round*** page loads.

4. Optionally, update the notification details:

   (a) Select the "Other" radio button for the notification detail you want to modify.

   (b) Type the new notification details. You can include the following variables, the values of which will be replaced in the actual notification message:

   - *<DATETIME>*
   - *<MANAGER_ID>*
   - *<LINK>*

   If you make changes, click **Update**.

5. Click **Continue**.

   Hitachi ID Bravura Identity displays a summary of the descriptions.

6. Click **Submit**.

   Bravura Identity notifies selected managers to start the process.

4.4.2 Canceling an Org building round

To cancel an Org building round:

1. Click **Manage the OrgChart → Org building rounds**.

2. Enable the checkbox for one or more rounds, then click **Cancel**.

Notes on OrgChart building rounds:

When a manager involved in an OrgChart building round has been removed, their segment will be escalated and the manager acting as the delegate will now be able to sign-off the round.

4.5 Viewing the OrgChart structure

You can view the OrgChart structure graphically by clicking **Manage the OrgChart → Browse the OrgChart**. The OrgChart structure displays the selected user, his manager, the peers in his branch, and his subordinates. From here you can click the user's name to view his profile, or click the arrow for a slide-out card to display additional links.

4.6   Configuration notes

- To set up product administrators with the rights to maintain the OrgChart, see Product administrators in the *Bravura Security Fabric* Documentation .

- The **Detach all affected subordinates** button is not available by default. This behavior is controlled by the **IDG ALLOW DETACH TREE** option on the **Modules** → **Manage the OrgChart (IDG)** page.

- To configure the *Manage the OrgChart* (IDG) module module, including the **IDG ALLOW DETACH TREE** option, see Manage the OrgChart (IDG) in the *Bravura Security Fabric* Documentation .

Viewing the OrgChart (Regular User)

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The *Hitachi ID Bravura Identity* OrgChart is a representation of the relationships in your organization. The OrgChart identifies the primary manager or supervisor for every person.
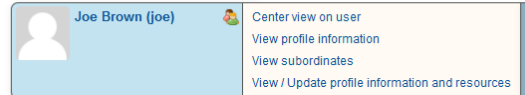
You can view the OrgChart structure graphically by clicking **Browse the OrgChart**. The OrgChart structure displays the selected user, his manager, the peers in his branch, and his subordinates. From here you can click the user's name to view his profile, or click the arrow for a slide-out card to display additional links.

5.1 Viewing other managers' subordinates
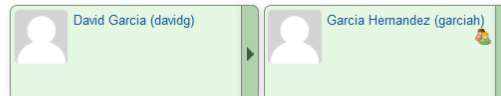
To view other managers' subordinates:

1. From the main menu , click **Browse the OrgChart** → **View other managers' subordinates**.

2. Browse or search the list to select the user whose subordinates you want to see.

Configuration notes

Users require the "Browse OrgChart" user access rule to access this option. This is enabled for all self-service users by default.

Managing OrgChart Subordinates (Regular User) 6

The main purpose of *Hitachi ID Bravura Identity*'s OrgChart feature is to enable *managers* at any level of an enterprise-scale organization to help build and maintain comprehensive OrgChart data. This way the work is spread out to all managers and is completed efficiently and accurately.

For the purposes of *Bravura Identity*, a manager is a user who has subordinates. Non-managers do not have subordinates. Any user may attach, detach, or transfer subordinates.

When you make changes to your subordinate list, all modifications must be approved by your direct manager. Your direct manager will be asked to approve your requests after you complete the sign off process. The only exception to this is for the top-level manager whose subordinate list changes are auto-approved.

> **Note:** The subordinates are designated as the recipients in the change requests.

A *Bravura Identity* administrator can start an Org building round to invite managers to identify or verify their subordinates. Once a manager signs off on his subordinates, the manager on the next level down is invited to participate in the process, until all levels of the OrgChart have been built or verified.

Users can also submit requests to update their list of subordinates outside of an Org building round.

6.1 Getting started

If you have received an invitation to review your list of subordinates, follow the link in your email, or the **You have to update your list of subordinates** link on the main menu.

If you need to request an update outside of an Org building round, click **Browse the OrgChart → View my subordinates** on the main menu.

Hitachi ID Bravura Identity displays your **Subordinates** page. If *Bravura Identity* already knows about some of your subordinates, they are listed on this page.

After each update, you may need to click **Refresh** to update the display.

The rest of this chapter shows you how to:

- Attach subordinates (p25)
- Detach subordinates (p25)
- Transfer subordinates (p26)
- Sign off on an Org building review (p27)
- Submit changes for review (p28)
- Approve changes made by other managers (p28)

Subordinates Joe Brown [joe]

Please update your list of subordinates and indicate which ones have their own subordinates.

Joe Brown (joe) reports to Christopher Anderson (andersch) . 🔍

[Attach subordinates]

☐	Invite to review subordinates	Name	Subordinates	Status
☐	☑	David Garcia (davidg)	(3) 🔍	Changes to be submitted: • Detach subordinate [Undo]
☐	☑	Garcia Hernandez (garciah)	(4) 🔍	
☐	☐	Stanley Durant (stanley)	(0) 🔍	
☐	☐	Trevor Besser (trevor)	(0) 🔍	Pending approval: • Transfer user [Cancel]
			[Transfer] [Detach]	

Please sign off when you have completed reviewing your subordinates.

[Sign off] [Delegate]

6.2 Attaching subordinates to your list

The process of identifying a user as your subordinate is called "attaching" a subordinate.

To attach subordinates to your list:

1. Click **Attach subordinates**.

2. Browse or search the list to find the users who report to you. Select the checkbox next to those users.

   You can also click 'Show all users' on the top right to view users that already have a manager. If those users are selected, a transfer request will be submitted.

3. Click **Attach subordinates**.

If you change your mind before submitting the change for approval, click **Undo**. The subordinate is removed from your list immediately.

6.3 Detaching a subordinate

Detach a subordinate if the user still works for the organization but does not report to you, and his or her new manager is not known.

If you change your mind before you submit the changes for approval, you can restore a subordinate by clicking **Undo**.

If the subordinate you want to detach is a manager with subordinates, *Hitachi ID Bravura Identity* detaches the individual and attaches their subordinates to you. This will occur after you submit the change and it is approved. If you want to remove a manager from your subordinate list without transferring their subordinates to you, you must transfer the manager to another user.

6.4 Transferring subordinates

To transfer subordinates, on the *Subordinates <user ID> page* (p24):

1. Select the subordinates on the ***Subordinates <Manager>*** page, then click **Transfer**.
2. Click **Find new managers** to continue.

3. Select the subordinates to transfer, and select a new manager from the drop-down list. The drop-down list contains the following users:

   • Your direct manager
   • Your direct manager's subordinates
   • Your subordinates

   Alternatively, use the search function to select a new manager.

4. Click **Assign ...** to view the transfers.
5. Repeat Steps 3-4 until you have assigned all the subordinates to a new manager.

6. Click **Confirm** to transfer the subordinates.
   Hitachi ID Bravura Identity displays the text "Transfer pending" in the **Status** column.

The manager who is receiving the subordinates is required to accept or deny the transfer (Approving changes to the OrgChart) before any changes are made. However, if the new manager is your direct or indirect subordinate, then the request is auto-approved.

If you later change your mind, you can cancel the request by clicking **Cancel** as long as the transfer has not been completed.

> **Note:** If the transfer will create a cycle in the organization chart, your request will not be submitted and an error message will be given. For example, if the new manager is a subordinate of the subordinate being transferred.

6.5 Signing off on an Org review

When you have completed updates to your subordinates as part of an Org building round:

1. Click the **Invite to review subordinates** checkbox for any subordinates that you believe have subordinates that have not been identified in the organization chart.

   This will have been automatically enabled for subordinates that already have their own subordinates.

2. Click **Sign off** at the bottom of the *Subordinates <user ID> page* (p24).

3. Enter your password and click **Complete sign-off** if you are ready to submit your review.

   Alternatively, if you want to make additional changes, click **Postpone sign-off** to return to the review list.

Once you have signed off, you can make further changes, view the status of other managers' subordinate review, or start a subordinate review for another manager.

Subordinates Joe Brown [joe]

Joe Brown (joe) reports to Christopher Anderson (andersch) . 🔍

[Attach subordinates]

☐	Name	Subordinates	Segment status	Status
☐	David Garcia (davidg)	(3) 🔍	[4/15/2016] Invited	Pending approval: • Detach subordinate [Cancel]
☐	Garcia Hernandez (garciah)	(4) 🔍	[4/15/2016] Invited	
☐	Stanley Durant (stanley)	(0) 🔍		
☐	Trevor Besser (trevor)	(0) 🔍		Pending approval: • Transfer user [Cancel]

[Transfer] [Detach]

6.6   Submitting change requests

If you are requesting updates to your subordinates outside of an Org building round, click **Submit** at the bottom of the *Subordinates <user ID> page* (p24).

Changes are sent to your direct manager for approval.

6.7   Approving changes to the OrgChart

Hitachi ID Bravura Identity sends you an email when:

- A manager in your list of subordinates has made changes to their list. You are required to review the changes and approve or deny them.

- A manager has requested that a subordinate be transferred (p28) to you.

To authorize a request, follow the link in your email invitation, or click **Authorize requests** from the main menu . See the *Bravura Security Fabric* Self-Service and Help Desk User Guide for details.

> **Note:**   Changes made by the top-level manager are auto-approved.

Index

T
technical support, 2
top-level manager
     changing, 13
     identifying, 11

U
updating
     OrgChart administratively, 15

     30