Bravura Security Fabric Implementation:

Configure Delegation

Hitachi ID Bravura Security Fabric can automatically escalate requests to delegates, using the OrgChart and/or user classes.

This document includes:

- Requirement

- Solution

- Use case: Assigning a delegation

- Use case: Delegating a single request

Terminology

The following terms are introduced in this unit:

Delegate or **new authorizer** (n) The person to whom another person's responsibilities have been delegated or escalated.
(v) The act of manually transferring workflow responsibilities to someone else.

Primary or **old authorizer** The person who initially held a responsibility that is delegated or escalated to another person.

Delegation manager A person who can delegate other user's responsibilities.

Escalate The automated process that causes your responsibilities on a specific request to be transferred to someone else. This is caused through inaction on a given request.

Sub-delegation The act of further delegating an already delegated responsiblity.

1   Requirement

When people are on leave or currently busy, they need to delegate their responsibility to someone else.

2   Solution

A user who initially holds a responsibility is known as the *primary*. A user who acts on behalf of another is known as a *delegate*. Delegations can be indefinite, or for a limited time, and can be canceled at any time. Any user can become a delegate. Both the primary and the delegate must have an email address configured in *Hitachi ID Bravura Security Fabric*.

Users with the "Delegate workflow requests" permission are known as *delegation managers*. These users can delegate another user's responsibilities. They can also use API Service (idapi) requests (Delegation-Cancel and DelegationList) to clean obsolete delegations. To send these API Service requests, delegation manager also needs "IDAPI caller" privilege. For details on the DelegationCancel and DelegationList requests, see the *Bravura Security Fabric* Remote API manual.

Any user can request that all of their own responsibilities be delegated. They can also delegate responsibilities for a single request. The recipient of the request for delegation follows a link in their email invitation or uses an option on the main menu to respond.

When a delegate accepts a request for delegation, they are given the same permissions as the primary. For example, if the primary can access reports, this right will be passed on to the delegate. When a delegation ends or is canceled, those options are no longer available to the delegate.

> **Note:**   Network resource ownership managed by *Bravura Group* is *not* delegable.

In some cases, a delegate may have to review a request more than once; as themselves and then as another primary, or if they have accepted multiple delegation requests. The delegate can choose who they are acting as when they review a request. This is necessary because users may have different access to attributes. For example, using Figure 1 on page 3, if Carl Wong is a delegate for Sylvia Granger and Dan Singh, and a request is made that requires the approval of both authorizers, then Carl Wong must review the request as Sylvia Granger, then again as Dan Singh.

Users may be allowed to delegate responsibilities that have in turn been delegated or escalated to them. This is referred to as *sub-delegation*. It is controlled by the user requesting the delegation, or by a plugin.
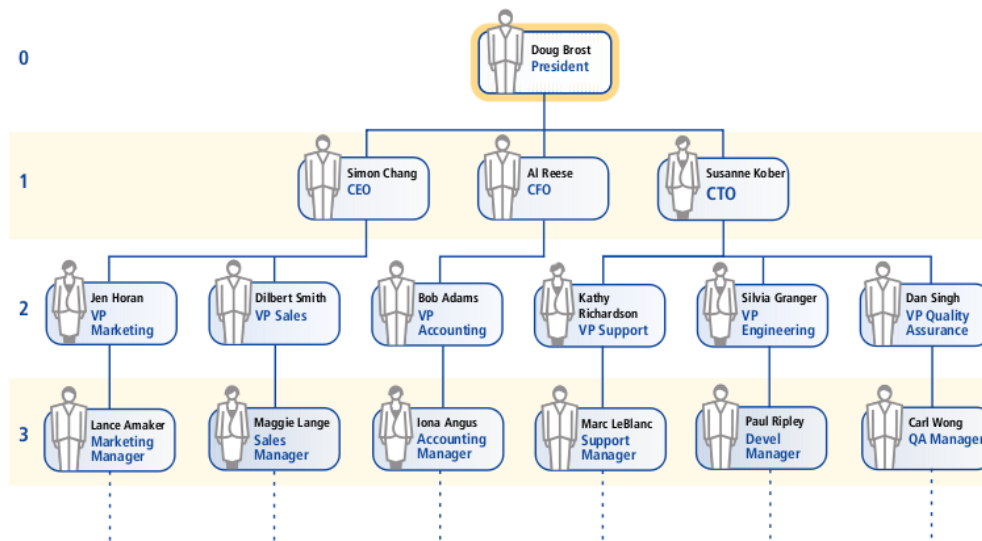
Figure 1: Organization chart example

3 Use case: Assigning a delegation

In this use case you will delegate the responsibilities of the Manager of IT to another IT team member. This will allow the team member to approve or deny requests on the manager's behalf while she is on leave.

This use case assumes that:

- *Hitachi ID Bravura Pattern: Workforce Edition* and *Hitachi ID Connector Pack* are installed.
- There is an Active Directory target system set up as a source of profiles.
- The Active Directory target is configured to create the OrgChart based on the manager attribute.
- User Adam is the manager of the IT-DB-READWRITE group.

Request a delegation

1. Log in to *Bravura Security Fabric* as Adam.

2. On the main menu , click **Delegate authority** in the **My profile** section.
   Hitachi ID Bravura Security Fabric displays the ***Delegation information*** page.

3. Set the following options:

   Delegate for and select ➤ Ken
   Start date Now
   End date Select a date two weeks in the future
   Ask the delegate before starting Selected
   Reason `Manager will be on leave`

Response required by Set a day in the future

Default action Accept delegation

Delegation type `All`

4. Click **Update**.

Bravura Security Fabric displays the delegation on the main ***Delegations*** page.

You can return to this page to review, update, or cancel delegations. You can update a delegation that you have made while it is pending. You can cancel a delegation that you have made at any time. This applies to delegations of your own authority as well as delegations of other users' authority that you have made for others.

The **Show all** icon allows you to see expired delegation requests.

You can also request delegations for:

- One or more individual requests, when you are reviewing requests
- Implementation tasks
- Certification campaigns, when you are reviewing users and privileges
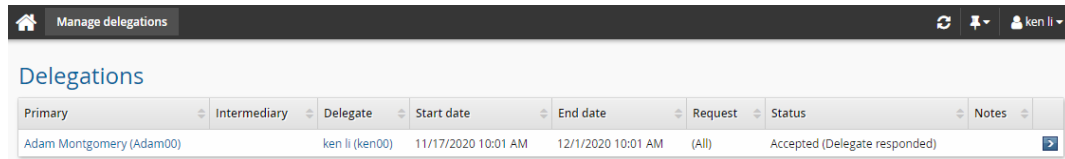
Respond to the request

When you receive a request for delegation, you will see a **Manage delegation** link on the main menu the next time you log into *Hitachi ID Bravura Security Fabric*.

To respond to the request:

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1. Log in to *Bravura Security Fabric* as `Ken`.

2. On the main menu click the **There are 1 delegation(s) awaiting your acceptance** link.

3. Click **Accept**.

4. Click Home 🏠, then click **Manage delegations** tab in the **Requests** to go back to the *Delegations* page.

   From the *Delegations* page, you can also select ▶ a request to view the request details.

Test the delegation

To test the delegation, login as Debbie and request to join the IT-DB-READWRITE group. Adam is the authorizer, however, you have delegated this responsibly to Ken which means, you can authorize the request as Ken.

1. Log in to *Bravura Security Fabric* as `Debbie.`

2. Click **View and update profile** in the **My profile** section.

3. Click **Change group membership** near the bottom of the page.

4. Search for and check the box for the IT-DB-READWRITE group.

5. Click **Submit**.

If you view the request details you should see the request requires authorization from Ken as a delegate for Adam.

Deny the request

1. Log in to *Bravura Security Fabric* as `Ken`.

2. Click the **There are 1 request(s) awaiting your approval as a delegate** link or click **Requests** in the **Requests** section.

   The *Requests* app will open.

3. Select the checkbox next to the request.

4. Click **Deny**.

5. Type `Insufficient need` in the box provided.

6. Click **Deny**.
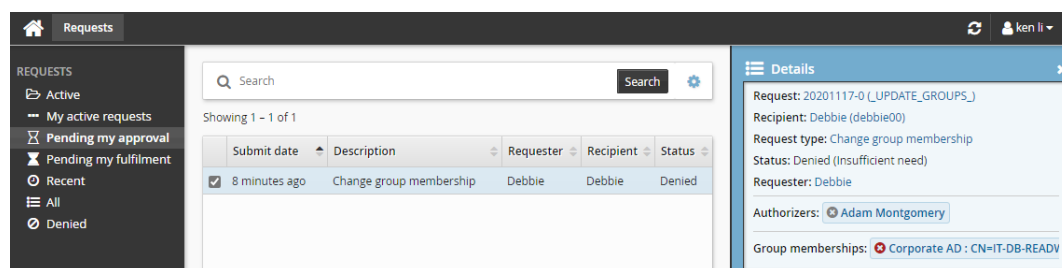
Cancel the delegation

Sometimes it may be necessary to cancel the delegation before the end date. In this scenario Adam has returned from holidays a week early.

1. Log in to *Bravura Security Fabric* as `Adam`.

2. Click **Delegate authority**.

3. Select the Ken delegation request.

4. Click **Cancel** and confirm that you want to cancel the selected item.

   The delegation has now been canceled and Adam will be reinstated as the appropriate authorizer.

4 Use case: Delegating a single request

The Scenario.im_corp_delegate_filter_orgchart component provides functionality which filters the list of available users who may be delegated authorization authority based on their level in the OrgChart.

This implements an OrgChart-based filtering of potential delegates. When installed, it allows a primary to delegate only to someone on the same level (same manager) or higher on the OrgChart.

In this use case we install the component Scenario.im_corp_delegate_filter_orgchart to filter out OrgChart data and delegate a single request to a higher level on the OrgChart.

This use case assumes that:

- *Hitachi ID Bravura Pattern: Workforce Edition* and *Hitachi ID Connector Pack* are installed.

- There is an Active Directory target system set up as a source of profiles.

- The Active Directory target is configured to create the OrgChart based on the manager attribute.

- User Adam is the manager of the IT-DB-READWRITE group.

- The OrgChart looks something like the following:
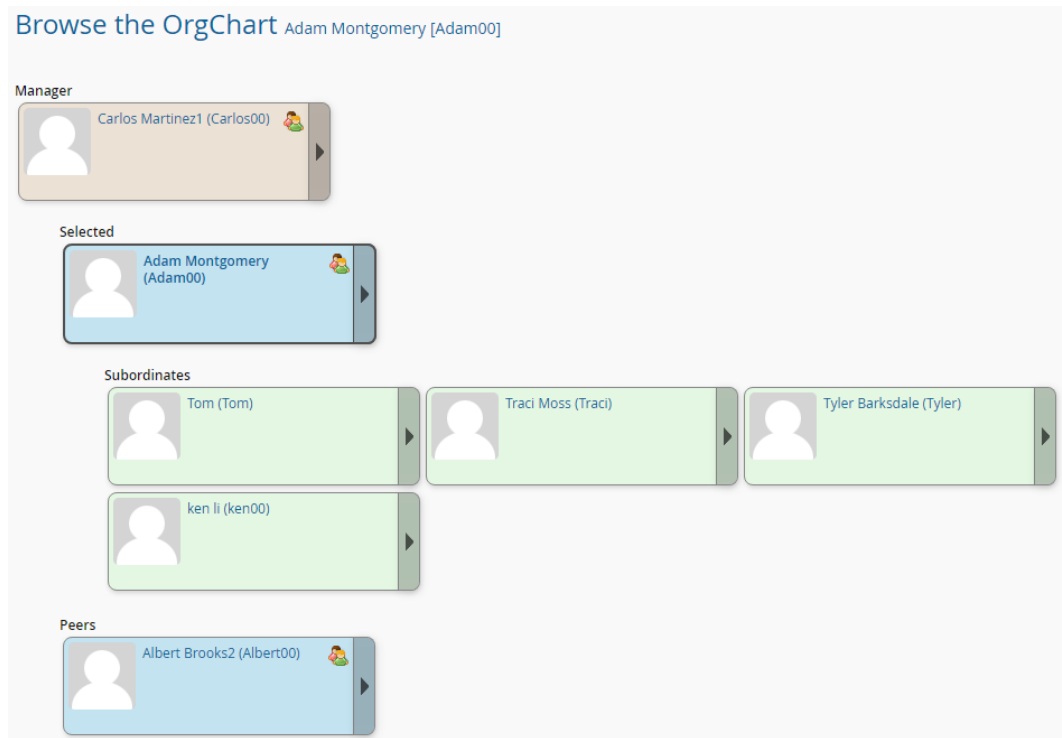
Delegate a single request

Login as Debbie to request to join the IT-DB-READWRITE group.

1. Log in to *Bravura Security Fabric* as Debbie.

2. Click **View and update profile** in the **My profile** section.

3. Click **Change group membership** near the bottom of the page.

4. Search for and check the box for the IT-DB-READWRITE group.
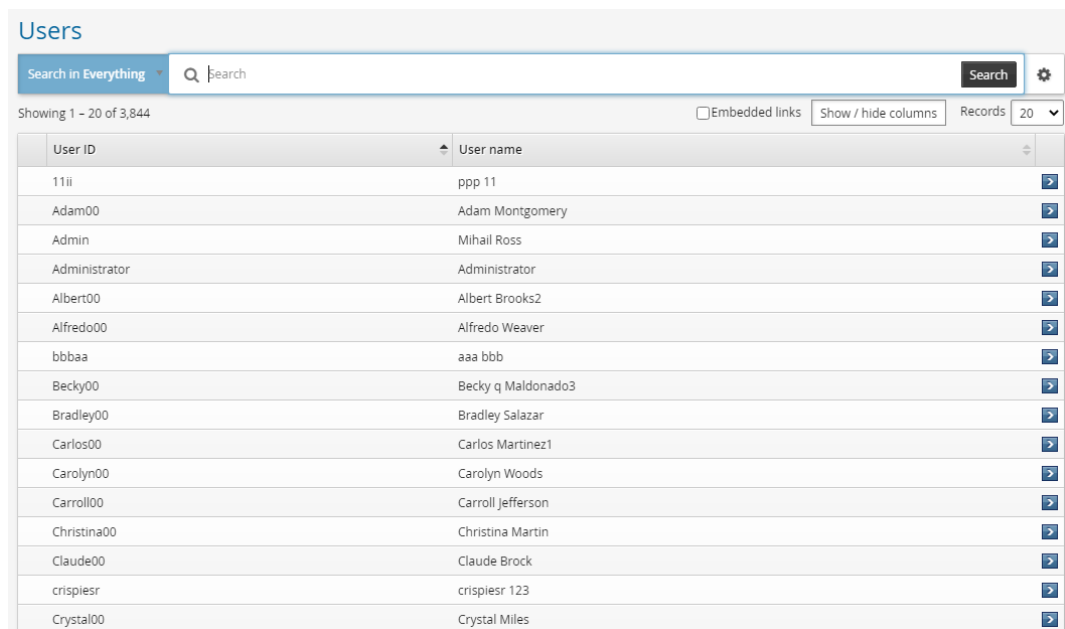
5. Click **Submit**.

Adam is the authorizer. Login as Adam, then check the request for delegation. When searching for the possible delegate, you will find all the users in the organization are listed.

1. Log in to *Bravura Security Fabric* as Adam.

2. Click the **There are 1 request(s) awaiting your approval** link or click **Requests** in the **Requests** section.

   The *Requests* app opens.
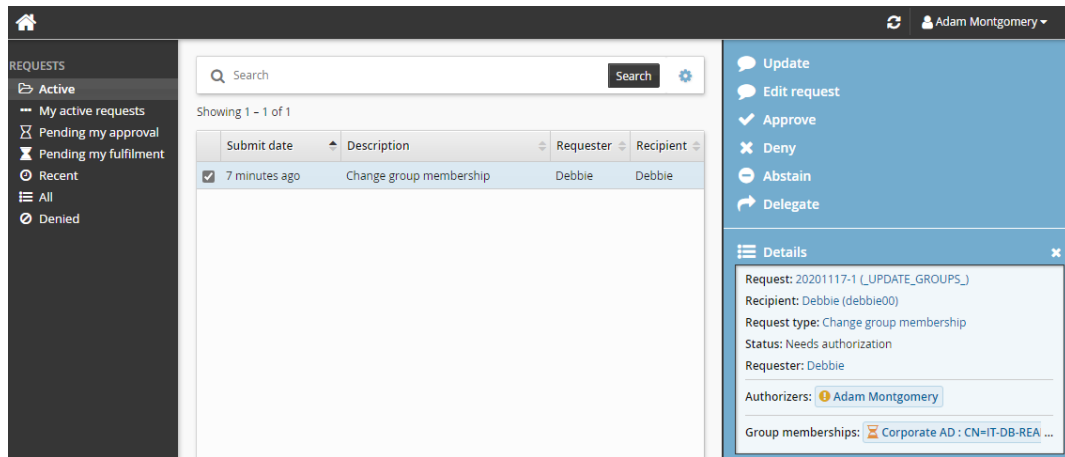
3. Click the request and click **Delegate**.

4. Search for the **Delegate**.

Install the Scenario.im_corp_delegate_filter_orgchart component:

1. Log in to *Bravura Security Fabric* as `superuser`.

2. Click **Manage components**.

3. Search and select Scenario.im_corp_delegate_filter_orgchart.

4. Click **Install component(s)**.

5. Wait until **Installed** becomes "True".

Login as Adam again, then check the request for delegation. When searching for the possible delegate, you will find only his manager and peers are listed.

1. Log in to *Bravura Security Fabric* as Adam.

2. Click the **There are 1 request(s) awaiting your approval** link or click **Requests** in the **Requests** section.

   The *Requests* app opens.

3. Click the request and click **Delegate**.

4. Search for the **Delegate**.
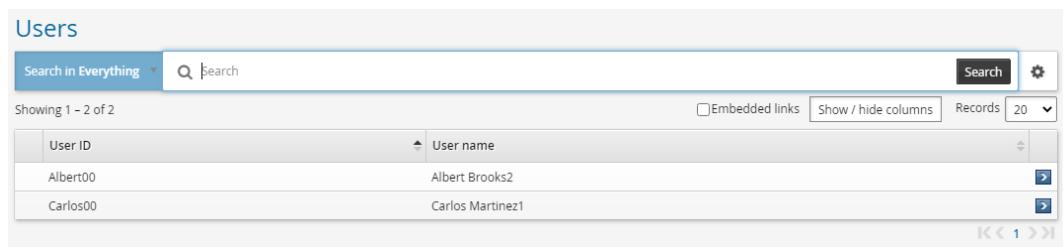
5. Select ▶ Carlos.

6. Set the following options:

   Ask the delegate before starting Unselected

   Allow further delegation Unselected

   Reason `Please review the request`

7. Click **Update**.

If you view the request details you should see the request requires authorization from Carlos as a delegate for Adam.

Request details

ⓘ Updated delegation from [Adam00] to [Carlos00].

Request summary:

Request: 20201117-1	**Requester:** Debbie (debbie00)
Status: Needs authorization	**Recipient:** Debbie (debbie00)
Submitted: 11/17/2020 1:12 PM	
Request type Change group membership	
Requester notes:	

Display details: ☑Operations ☑Authorizers ☐Authorization notes

Authorizers for this request:

Authorizer	Status	Date/time	Reason
Adam Montgomery (Adam00) Delegate: • Carlos Martinez1 (Carlos00)	Pending approval		

Groups to be assigned:

Target system	Group	Account	Status	Results	

Corporate AD	CN=IT-DB-READWRITE,OU=QA,DC=ad-qing00,DC=com	AD-QING00.COM\debbie00	Pending approval
			• Adam Montgomery (Adam00)
			  Delegate:
			  ○ Carlos Martinez1 (Carlos00)
					ⓘ

Approve the request

1. Log in to *Bravura Security Fabric* as Carlos.

2. Click the **There are 1 request(s) awaiting your approval as a delegate** link or click **Requests** in the **Requests** section.
   The *Requests* app opens.

3. Select the checkbox next to the request.

4. Click **Approve**.

5. Type `Approved` in the box provided.

6. Click **Approve**.

Verify the request is processed

1. Log in to *Bravura Security Fabric* as Debbie.

2. Click **View and update profile** in the **My profile** section.

3. Check Debbie's Accounts/Managed groups.

See also:

- For more detail on setting up escalation and delegation, see the *Bravura Security Fabric* Documentation .