

Institute of Computer Technology
B. Tech Computer Science and Engineering

Sub: Identity and Access Management (2CSE507)

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Semester - 5

Class - A

Batch – 52

PRACTICAL NO:- 9

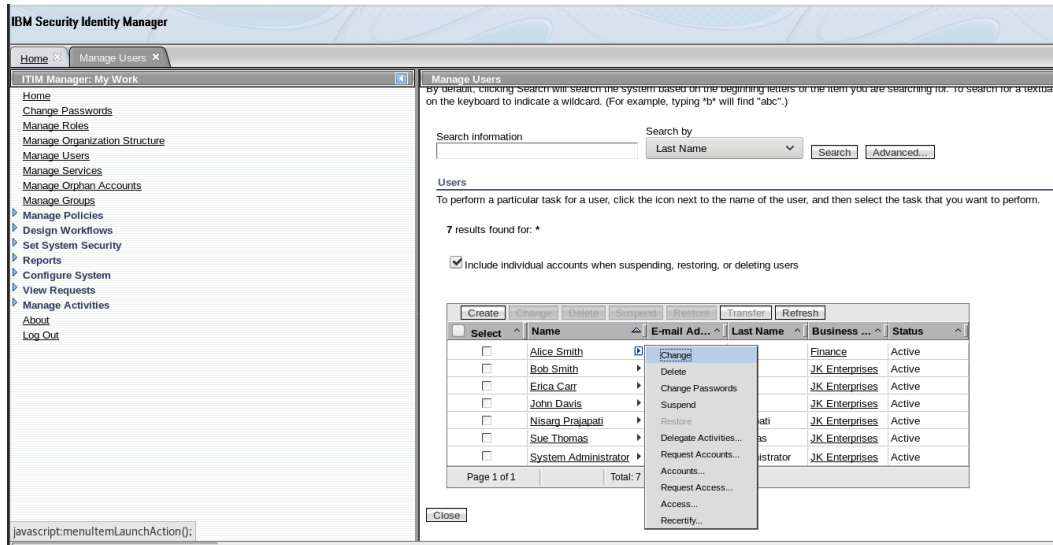
Aim : User management and Role management

Exercise 1 : Changing user information

Changing a name

Alice Smith gets married and decides to take her husband's surname, Smyth. In this part of the exercise, you modify her personal information to reflect the change.

1. On the Home tab, go to Manage Users.
2. Click Refresh. Locate Alice Smith. Click the arrow to the right of the name and click Change.



3. Change the Last name, Full name, Preferred user ID, and email address attributes to reflect her married name, Smyth. Click Submit Now to send the update.

Change User	
<ul style="list-style-type: none"> Personal Information Business Information Contact Information Assignment Attributes 	<p>Manage Users > Change User > Personal Information</p> <p>Type the appropriate information for the user. When you are done specifying information Schedule Submission to schedule the request.</p> <p>*Last name Smyth</p> <p>*Full name Alice Smyth</p> <p>*Preferred user ID asmyth</p> <p>First name Alice</p> <p>Initials </p>

Change User	
<ul style="list-style-type: none"> Personal Information Business Information Contact Information Assignment Attributes 	<p>Manage Users > Change User > Contact Information</p> <p>Type the appropriate information for the user. When you are done specifying information Schedule Submission to schedule the request.</p> <p>E-mail address asmyth@jke.test</p> <p>Telephone number </p> <p>Mobile telephone number </p>

Change User

Manage Users > Change User > Success

You successfully submitted a request for **November 5, 2025 at 6:40 PM** to change the profile for **Alice Smyth**.

Other Tasks

View my request

Close

4. Refresh the user list to confirm the name change.

Manage Users

Manage Users > Select a User

To locate a user that you want to manage, type information about the user in the field, select a filter, and then click Search. The Search will search the system based on the beginning letters of the item you are searching for. To search for a textual pattern in example, typing "b*" will find "abc".)

Search information

Search by

Last Name

Search

Advanced...

Users

To perform a particular task for a user, click the icon next to the name of the user, and then select the task that you want to perform.

7 results found for: *

☒ Include individual accounts when suspending, restoring, or deleting users

	Create	Change	Delete	Suspend	Restore	Transfer	Refresh
<input type="checkbox"/> Select	Name	E-mail Ad...	Last Name	Business ...	Status		
<input type="checkbox"/>	Alice Smyth	asmith@jke....	Smyth	Finance	Active		
<input type="checkbox"/>	Bob Smith	bsmith@jke.test	Smith	JK Enterprises	Active		
<input type="checkbox"/>	Erica Carr	ecarr@jke.test	Carr	JK Enterprises	Active		
<input type="checkbox"/>	John Davis	jdavis@jke.test	Davis	JK Enterprises	Active		
<input type="checkbox"/>	Nisarg Prajapati	NPrajapati@j...	Prajapati	JK Enterprises	Active		
<input type="checkbox"/>	Sue Thomas	sthamas@jk...	Thomas	JK Enterprises	Active		
<input type="checkbox"/>	System Administrator		Administrator	JK Enterprises	Active		

Page 1 of 1

Total: 7 Displayed: 7 Selected: 0

Close

5. Click the arrow to the right of Alice Smyth and click Accounts. Click Refresh. For the account on ITIM Service, Click arrow to the right and Click Change and change the user id from asmith to asmyth and Submit the request. Click Refresh to confirm changes.

Select	Name	E-mail Ad...	Last Name	Business ...	Status
<input type="checkbox"/>	Alice Smyth			Finance	Active
<input type="checkbox"/>	Bob Smith			JK Enterprises	Active
<input type="checkbox"/>	Erica Carr			JK Enterprises	Active
<input type="checkbox"/>	John Davis			JK Enterprises	Active
<input type="checkbox"/>	Nisarg Prajapati			JK Enterprises	Active
<input type="checkbox"/>	Sue Thomas			JK Enterprises	Active
<input type="checkbox"/>	System Administrator			JK Enterprises	Active

Page 1 of 1 Total: 7

Close

Change
 Delete
 Change Passwords
 Suspend
 Restore
 Delegate Activities...
 Request Accounts...
Accounts...
 Request Access...
 Access...
 Recertify...

1 results found for: *

S	State	User ID	Service Name	Ownership Type	Status
<input type="checkbox"/>		asmith		Individual	Active

Page 1 of 1 Total: 1 Displayed

Close

Change
 Delete
 Change Password
 Suspend
 Restore
 Change Category

Change Account

Manage Users > Change Account > Account Information

To change the account information for **asmith** on service **ITIM Service**, type t
account immediately or Schedule Submission to schedule the request.

*User ID
 asmyth

☐ Change password at next logon?

ITIM groups

Search...
 Delete

Submit Now Schedule Submission Cancel

Manage Users > Accounts

To perform a particular task on an account for **Alice Smyth**, click the icon next to the name of the user, and then select the task that you want to perform.

1 results found for: *

Request...	Change	Delete	Suspend	Restore	Change Category	Refresh
<input type="checkbox"/>	S ^	State ^	User ID	Service Name ^	Ownership Type ^	Status ^
<input type="checkbox"/>		asmyth	ITIM Service	Individual		Active
Page 1 of 1		Total: 1 Displayed: 1 Selected: 0				

Changing a manager attribute

Through a management restructuring, Alice Smyth now reports to Sue Thomas. In this part of the exercise, you modify Alice's manager attribute.

1. On the Home tab, you go to Manage Users.
2. Locate Alice Smyth. Click the arrow to the right of the name and click Change.

The screenshot shows the 'Manage Users' interface with a list of users. The 'Change' option is highlighted in the context menu for Alice Smyth. The 'Close' button is visible at the bottom left.

Select	Name	E-mail Address	Last Name	Business Information	Status
<input type="checkbox"/>	Alice Smyth			Finance	Active
<input type="checkbox"/>	Bob Smith			JK Enterprises	Active
<input type="checkbox"/>	Erica Carr			JK Enterprises	Active
<input type="checkbox"/>	John Davis			JK Enterprises	Active
<input type="checkbox"/>	Nisarg Prajapati			JK Enterprises	Active
<input type="checkbox"/>	Sue Thomas			JK Enterprises	Active
<input type="checkbox"/>	System Administrator			JK Enterprises	Active

Page 1 of 1 Total: 7

3. Click the Business Information tab.

Change User

Manage Users > Change User > Business Information

Type the appropriate information for the user. When you are done specifying information on each of the tabs, Click Schedule Submission to schedule the request.

Office number

Employee number

Title

Manager

Postal address

Administrative assistant

4. In the Manager field, click Search and locate Sue Thomas. Select Sue as the manager and Click OK.

Change User

Change User > Select People

To add a person, select the person that you want to add.

Attribute: Full name Operator: Contains Value: sue

Users

To add a person, select the person, and then click OK.

1 results found for: sue

Select	Name	E-mail Ad...	Last Name	Business ...	Status
<input checked="" type="radio"/>	Sue Thomas	stthomas@jk...	Thomas	JK Enterprises	Active

Page 1 of 1 Total: 1 Displayed: 1 Selected: 1

Change User

Manage Users > Change User > Business Information

Type the appropriate information for the user. When you are done specifying information on each of the tabs Schedule Submission to schedule the request.

Office number

Employee number

Title

Manager
Sue Thomas

Postal address

Administrative assistant

5. Click Submit Now to update the entry. Click Close.

Exercise 2 : Transferring users

If a user is promoted, or is added to the incorrect branch of the organization tree, you can transfer the user to the proper branch.

1. On the Home tab, go to Manage Users.
2. Search the user list and locate the entry for Sue Thomas.
3. Select the Sue Thomas entry and click Transfer.

<div> <div>Create</div> <div>Change</div> <div>Delete</div> <div>Suspend</div> <div>Restore</div> <div>Transfer</div> <div>Refresh</div> </div>					
<input type="checkbox"/> Select	Name	E-mail Ad...	Last Name	Business ...	Status
<input type="checkbox"/>	Alice Smyth	asmith@jke....	Smyth	Finance	Active
<input type="checkbox"/>	Bob Smith	bsmith@jke.test	Smith	JK Enterprises	Active
<input type="checkbox"/>	Erica Carr	ecarr@jke.test	Carr	JK Enterprises	Active
<input type="checkbox"/>	John Davis	jdavis@jke.test	Davis	JK Enterprises	Active
<input type="checkbox"/>	Nisarg Prajapati	NPrajapati@j...	Prajapati	JK Enterprises	Active
<input checked="" type="checkbox"/>	Sue Thomas	sthomas@jk...	Thomas	JK Enterprises	Active
<input type="checkbox"/>	System Administrator		Administrator	JK Enterprises	Active
<div> <div>Page 1 of 1</div> <div>Total: 7 Displayed: 7 Selected: 1</div> </div>					

[Close](#)

4. Search for the Finance organizational unit. Select Finance and click OK.

Transfer User

Manage Users > Transfer User > Business Unit

Find the business unit to transfer the selected user to by typing in information about

Search information

finance

Search by

All

Search

Business Units Found

Select a business unit and click OK

1 results found for: **finance**

Select	Name	Parent	Description	Type
<input checked="" type="radio"/>	Finance	JK Enterprises	Finance Organizational Unit	Organizational Unit

Page 1 of 1

Total: 1 Displayed: 1 Selected: 1

OK

Cancel

5. Click Transfer. Click Close.
6. Return to the Manage Users tab. Refresh the user list to verify that Sue Thomas is transferred.

Create		Change		Delete		Suspend		Restore		Transfer		Refresh	
<input type="checkbox"/>	Select ^	Name ^	E-mail Ad... ^	Last Name ^	Business ... ^	Status ^							
<input type="checkbox"/>		Alice Smyth	▶ asmyth@jke...	Smyth	Finance	Active							
<input type="checkbox"/>		Bob Smith	▶ bsmith@jke.test	Smith	JK Enterprises	Active							
<input type="checkbox"/>		Erica Carr	▶ ecarr@jke.test	Carr	JK Enterprises	Active							
<input type="checkbox"/>		John Davis	▶ jdavis@jke.test	Davis	JK Enterprises	Active							
<input type="checkbox"/>		Nisarg Prajapati	▶ NPrajapati@j...	Prajapati	JK Enterprises	Active							
<input type="checkbox"/>		Sue Thomas	▶ sthomas@jk...	Thomas	Finance	Active							
<input type="checkbox"/>		System Administrator	▶	Administrator	JK Enterprises	Active							
Page 1 of 1		Total: 7 Displayed: 7 Selected: 0											

7. Repeat steps 1 through 6 to transfer Bob Smith to the WW location in Sales. Also, transfer John Davis to the TechSupport business partner organization.
8. When you are done, the user list should look like this:

Create		Change		Delete		Suspend		Restore		Transfer		Refresh	
<input type="checkbox"/>	Select	^	Name	^	E-mail Ad...	^	Last Name	^	Business ...	^	Status	^	
<input type="checkbox"/>			Alice Smyth	▶	asmyth@jke...		Smyth		Finance		Active		
<input type="checkbox"/>			Bob Smith	▶	bsmith@jke.test		Smith		WW		Active		
<input type="checkbox"/>			Erica Carr	▶	ecarr@jke.test		Carr		JK Enterprises		Active		
<input type="checkbox"/>			John Davis	▶	jdavis@jke.test		Davis		TechSupport		Active		
<input type="checkbox"/>			Nisarg Prajapati	▶	NPrajapati@j...		Prajapati		JK Enterprises		Active		
<input type="checkbox"/>			Sue Thomas	▶	sthomas@jk...		Thomas		Finance		Active		
<input type="checkbox"/>			System Administrator	▶			Administrator		JK Enterprises		Active		
Page 1 of 1				Total: 7		Displayed: 7		Selected: 0					

Exercise 3 : Creating organizational roles

JK Enterprises wants to create organizational roles for the various functions in each department. In this exercise, you create static and dynamic roles.

Creating static organizational roles

1. On the Home tab, click Manage Roles.
2. Click Create to add a new role.

Manage Roles

To locate a role that you want to manage, type information about the role in the field, select the search criteria, and then click Search. The roles that match your criteria clicking Search will search the system based on the beginning letters of the item you are searching for. To search for a textual pattern in the middle of an item, use the (For example, typing *b* will find "abc".)

Search Information Search by
☒ Role name or description
☐ Business unit

Roles

You can add, change, move, delete roles, manage role membership, or manage role hierarchy. Select the role in the table, and then click the appropriate button or use

1 results found for: *

Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled	

Page 1 of 1 Total: 1 Displayed: 1 Selected: 0

3. Complete the Create Role form with the following information:

Manage Roles > Create Role > Role Type


To create a role, select the role type. Also, select a business unit to which the role applies. If

Role type
☒ Static
☐ Dynamic

Role classification

*Business unit

Manage Roles	
<div><div>✓ Role Type</div><div>➤ General Information</div><div>Access Information</div><div>Assignment Attributes</div><div>Role Membership</div></div>	<div>Manage Roles > Create Role > General Information</div> <div>To create a role, type the name of the role and any other information on the form. Then click Next.</div> <div><div>*Name</div><div>JKE System Admin</div></div> <div><div>Description</div><div>Organizational Role for System Administrators</div></div>
<div>< Back Next > Finish Cancel</div>	

Manage Roles	
<div><div>✓ Role Type</div><div>✓ General Information</div><div>➤ Access Information</div><div>Assignment Attributes</div><div>Role Membership</div></div>	<div>Manage Roles > Create Role > Access Information</div> <div>You can add or remove owners for this role. Also, you can enable access, and specify access type for this role.</div> <div><div>➤ Owners</div><div><input checked="" type="checkbox"/> Enable access for this role</div><div><input type="checkbox"/> Show this role as a common access</div><div>Select access type</div><div><div>Access Types</div><div><div>Application</div><div>E-mail group</div><div>Role</div><div>Shared folder</div></div></div><div><div>Access icon</div><div>No URL is set. The access type icon will be used.</div><div>Image preview</div><div> Icon URL <input type="text"/></div></div><div><div>Search terms</div><div><input type="text"/> <input type="button" value="Add"/></div><div><input type="text"/> <input type="button" value="Delete"/></div></div><div><div>Additional information</div><div><input type="text"/></div></div></div>
<div>< Back Next > Finish Cancel</div>	

Manage Roles

✓ Role Type

✓ General Information

✓ Access Information

⇒ Assignment Attributes

Role Membership

Manage Roles > Create Role > Assignment Attributes

You can add assignment attributes for this role. To add an assignment attribute, type the name of the assignment attribute.

Attribute Name

Add

Remove

Select	Attribute Name	Attribute Label

Total: 0 Displayed: 0 Selected: 0

< Back

Next >

Finish

Cancel

Manage Roles

✓ Role Type

✓ General Information

✓ Access Information

✓ Assignment Attributes

⇒ Role Membership

Manage Roles > Create Role > Role Membership

You can add or remove members that are associated with the role. Select the member in the list.

Add...

Remove

Select	User Name	Business Unit

Total: 0 Displayed: 0 Selected: 0

< Back

Next >

Finish

Cancel

Manage Roles

Manage Roles > Create Role > Add User Members

To locate a user that you want to add to **JKE System Admin** role, type information about the user in the field, select the criteria in the table below. By default, clicking Search will search the system based on the beginning letters of the item you are searching for. (For example, typing *b* will find "abc".)

Search information: Search by:

Users

To add a member to the role, select the user, and then click OK.

1 results found for: **erica**

<input checked="" type="checkbox"/> Select	Name	E-mail Address	Last Name	Business Unit	Status
<input checked="" type="checkbox"/>	Erica Carr	ecarr@jke.test	Carr	JK Enterprises	Active

Page 1 of 1 Total: 1 Displayed: 1 Selected: 1

Manage Roles

Manage Roles > Create Role > Role Membership

You can add or remove members that are associated with the role. Select the member in the table below.

<input type="checkbox"/> Select	User Name	Business Unit
<input type="checkbox"/>	Erica Carr	JK Enterprises

Page 1 of 1 Total: 1 Displayed: 1 Selected: 0

4. Click Finish. Click Return to the list of Roles I was working with.

Manage Roles

✓ Role Type

✓ General Information

✓ Access Information

✓ Assignment Attributes

✓ Role Membership

∞ Schedule

Manage Roles > Create Role > Schedule

Choose a time and date to schedule this operation.

☒ Immediate
 ☐ Effective date

Date

11/5/2025

Time

10:27 PM

< Back

Next >

Finish

Cancel

Manage Roles

Manage Roles > Create Role > Success

You successfully created static role **JKE System Admin**.
The membership update request will be processed on **Immediate**.

Other Tasks

[Return to the list of roles I was working with](#)
[View my request](#)

Close

Roles

You can add, change, move, delete roles, manage role membership, or manage role hierarchy. Select the role in the table, and then click the appropriate button.

2 results found for: *

<div> <div>Create</div> <div>Change</div> <div>Delete</div> <div>Transfer</div> <div>Export Access Data</div> <div>Import Access Data</div> <div>Enable Access</div> <div>Disable Access</div> <div>Refresh</div> </div>							
Select	Name	Description	Business ...	Role ...	Access Status	Access Type	
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled		
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static	Access Enabled	Role	
Page 1 of 1		Total: 2 Displayed: 2 Selected: 0					

5. Repeat steps 2 through 4 to create 5 more static roles (these roles do not have any members initially):

- System Account Owner with a Business unit of JK Enterprises
- Finance Employees with Business unit of Finance.
- Asset Handling and Disposition with Business unit of Finance.

Check the Enable access for this role check box. Also, check the Show this role as a common access check box. These settings allow users to request membership in the roles as an access.

- Booking and Ledgers with Business unit of Finance.

Check the Enable access for this role check box. Also, check the Show this role as a common access check box.

- Comparison and Review with Business unit of Finance.


Check the Enable access for this role check box. Also, check the Show this role as a common access check box.

Create Change Delete Transfer Export Access Data Import Access Data Enable Access Disable Access Refresh						
<input type="checkbox"/> Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled	
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static	Access Enabled	Role
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static	Access Enabled	Role
Page 1 of 1 Total: 7 Displayed: 7 Selected: 0						

Creating Dynamic organizational roles

- Create another role, this time choose the Dynamic role type.
- Complete the Create Role form with the following information:

Manage Roles	
<div>⇒ Role Type</div> <div>General Information</div> <div>Access Information</div> <div>Additional Steps...</div>	<div>Manage Roles > Create Role > Role Type</div> <div>To create a role, select the role type. Also, select a business unit to which the role applies</div> <div>Role type</div> <div><input type="radio"/> Static</div> <div><input checked="" type="radio"/> Dynamic</div> <div>Role classification</div> <div><input type="text" value="v"/></div> <div>*Business unit</div> <div><input type="text" value="JK Enterprises"/> <input type="button" value="Search..."/></div> <div>Make role applicable to persons in</div> <div><input checked="" type="radio"/> This business unit and its subunits</div> <div><input type="radio"/> This business unit only</div> <div><input type="button" value="Back"/> <input type="button" value="Next >"/> <input type="button" value="Finish"/> <input type="button" value="Cancel"/></div>

Manage Roles	
<div>✓ Role Type</div> <div>✓ General Information</div> <div>⇒ Access Information</div> <div>Definition (Rule)</div> <div>Schedule</div>	<div>Manage Roles > Create Role > Access Information</div> <div>You can add or remove owners for this role. Also, you can enable access, and specify access type for this role.</div> <div>Owners</div> <div><input checked="" type="checkbox"/> Enable access for this role</div> <div>Select access type</div> <div><input checked="" type="checkbox"/> Access Types</div> <div><input checked="" type="checkbox"/> Application</div> <div><input checked="" type="checkbox"/> E-mail group</div> <div><input checked="" type="checkbox"/> Role</div> <div><input checked="" type="checkbox"/> Shared folder</div> <div>Access icon</div> <div>No URL is set. The access type icon will be used.</div> <div>Image preview</div> <div> <input type="text" value="Icon URL"/></div> <div>Search terms</div> <div><input type="text"/> <input type="button" value="Add"/></div> <div><input type="text"/> <input type="button" value="Delete"/></div> <div>Additional information</div> <div><input type="text"/></div> <div><input type="button" value="Back"/> <input type="button" value="Next >"/> <input type="button" value="Finish"/> <input type="button" value="Cancel"/></div>

Manage Roles	
<div><div>✓ Role Type</div><div>✓ General Information</div><div>✓ Access Information</div><div>⇨ Definition (Rule)</div><div>Schedule</div></div>	<div>Manage Roles > Create Role > Definition (Rule)</div> <div>Enter the LDAP filter criteria to select which users will receive this role.</div> <div><div>*Definition (Rule)</div><div>(title=*Manager*)</div></div>
<div>< Back Next > Finish Cancel</div>	

Manage Roles	
<div><div>✓ Role Type</div><div>✓ General Information</div><div>✓ Access Information</div><div>✓ Definition (Rule)</div><div>⇨ Schedule</div></div>	<div>Manage Roles > Create Role > Schedule</div> <div>Choose a time and date to schedule this operation.</div> <div><div><input checked="" type="radio"/> Immediate</div><div><input type="radio"/> Effective date</div></div> <div><div>Date</div><div>11/6/2025</div><div>Time</div><div>8:27 PM</div></div>
<div>< Back Next > Finish Cancel</div>	

3. Click Finish.
4. On the Home tab, click Manage Roles and refresh the list.

Create Change Delete Transfer Export Access Data Import Access Data Enable Access Disable Access Refresh						
<input type="checkbox"/> Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled	
<input type="checkbox"/>	JKE Managers	Organizational Role for JKE Managers	JK Enterprises	Dynamic	Access Enabled	Role
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static	Access Enabled	Role
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static	Access Enabled	Role
Page 1 of 1 Total: 8 Displayed: 8 Selected: 0						

5. Click the arrow to the right of the JKE Managers role and click Manage User Members.

Create Change Delete Transfer Export Access Data Import Access Data Enable Access Disable Access Refresh						
<input type="checkbox"/> Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static	Common Access Enabled	Role
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled	
<input type="checkbox"/>	JKE Managers	Organizational Role for JKE Managers	JK Enterprises	Dynamic	Access Enabled	Role
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static	Access Enabled	Role
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static	Access Enabled	Role
Page 1 of 1 Total: 8 Displayed: 8 Selected: 0						

[Change](#)
[Delete](#)
[Transfer](#)
[Manage User Members...](#)
[Manage Provisioning Policies...](#)


6. Verify that the users in this dynamic role have manager in their title by viewing the Business Information section.

Manage Roles				
Manage Roles > Manage User Members and Child Roles				
To locate the users that are associated with role JKE Managers , type information in the field & then click search. The system will search the system based on the beginning letters of the item you are searching for. To search for a textual pattern typing *b* will find "abc".)				
Search information	Search by		Search	Advanced...
<input type="text"/>	Last Name			
Users				
You can add, remove or set assignment attributes to the members that are associated with the role. Select the member specifying a definition (rule).				
Name	E-mail Address	Last Name	Business ...	Status
Total: 0 Displayed: 0				
Close				

7. Create another Dynamic role
8. Complete the form with the following information:

Manage Roles	
Manage Roles > Create Role > Role Type	
To create a role, select the role type. Also, select a business unit to which the role applies	
<div> <div>Role Type</div> <div> General Information Access Information Additional Steps... </div> </div>	<div> <div>Role type</div> <div> <input type="checkbox"/> Static <input checked="" type="radio"/> Dynamic </div> </div> <div> <div>Role classification</div> <div> <input type="text"/> </div> </div> <div> <div>*Business unit</div> <div> TechSupport </div> </div> <div> <div>Make role applicable to persons in</div> <div> <input checked="" type="radio"/> This business unit and its subunits <input type="radio"/> This business unit only </div> </div>
<div> <div>< Back</div> <div>Next ></div> <div>Finish</div> <div>Cancel</div> </div>	

Manage Roles	
<div><div>✓ Role Type</div><div>⇨ General Information</div><div>Access Information</div><div>Definition (Rule)</div><div>Schedule</div></div>	<div>Manage Roles > Create Role > General Information</div> <div>To create a role, type the name of the role and any other information on the form. Then click Next.</div> <div>*Name Help Desk</div> <div>Description TechSupport help desk</div> <div>< Back Next > Finish Cancel</div>

Manage Roles	
<div><div>✓ Role Type</div><div>✓ General Information</div><div>⇨ Access Information</div><div>Definition (Rule)</div><div>Schedule</div></div>	<div>Manage Roles > Create Role > Access Information</div> <div>You can add or remove owners for this role. Also, you can enable access, and specify access type for this role.</div> <div>▶ Owners</div> <div><input checked="" type="checkbox"/> Enable access for this role</div> <div>Select access type</div> <div><div>Access Types</div><div>Application</div><div>E-mail group</div><div>Role</div><div>Shared folder</div></div> <div>Access icon No URL is set. The access type icon will be used. Image preview  Icon URL <input type="text"/></div> <div>Search terms <input type="text"/> <input type="button" value="Add"/> <input type="text"/> <input type="button" value="Delete"/></div> <div>Additional information <input type="text"/></div> <div>< Back Next > Finish Cancel</div>

Manage Roles

✓ Role Type

✓ General Information

✓ Access Information

∞ Definition (Rule)

Schedule

Manage Roles > Create Role > Definition (Rule)

Enter the LDAP filter criteria to select which users will receive this role.

*Definition (Rule)

(cn=*)

< Back

Next >

Finish

Cancel

Manage Roles

✓ Role Type

✓ General Information

✓ Access Information

✓ Definition (Rule)

∞ Schedule

Manage Roles > Create Role > Schedule

Choose a time and date to schedule this operation.

☒ Immediate

☐ Effective date

Date

11/6/2025

Time

8:57 PM

< Back

Next >

Finish

Cancel

Manage Roles

Manage Roles > Create Role > Success

You successfully submitted the following:

Operation: **Add**

Dynamic Role Name: **Help Desk**

Run: **Immediate**

The changes might take a few minutes to take effect.

Other Tasks

[Return to the list of roles I was working with](#)

[View my request](#)

Close

Create	Change	Delete	Transfer	Export Access Data	Import Access Data	Enable Access	Disable Access	Refresh
<input type="checkbox"/> Select	Name	Description	Business ...	Role ...	Access Status	Access Type		
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static	Common Access Enabled	Role		
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static	Common Access Enabled	Role		
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static	Access Enabled	Role		
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role		
<input type="checkbox"/>	Help Desk	TechSupport help desk	TechSupport	Dynamic	Access Enabled			
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static	Access Disabled			
<input type="checkbox"/>	JKE Managers	Organizational Role for JKE Managers	JK Enterprises	Dynamic	Access Enabled	Role		
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static	Access Enabled	Role		
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static	Access Enabled	Role		
Page 1 of 1		Total: 9 Displayed: 9 Selected: 0						

Exercise 4 : Creating child role assignments

In this exercise, you make the three finance department roles children of the Finance role.

1. On the Home tab, click Manage Roles.
2. In the Search Information box, type Finance* to find the role you created in the previous exercise.
3. Click Search. The result should be a list that contains your Finance Employees role.

Manage Roles

To locate a role that you want to manage, type information about the role in the field, select the search criteria, and then click Search. The roles that match your clicking Search will search the system based on the beginning letters of the item you are searching for. To search for a textual pattern in the middle of an item, (For example, typing "b*" will find "abc".)

Search Information:

Search by: ☒ Role name or description ☐ Business unit

Roles

You can add, change, move, delete roles, manage role membership, or manage role hierarchy. Select the role in the table, and then click the appropriate button.

1 results found for: **finance**

Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role

Page 1 of 1 Total: 1 Displayed: 1 Selected: 0

4. Click the arrow to the right of Finance Employees and select Add Child Roles.

Roles

You can add, change, move, delete roles, manage role membership, or manage role hierarchy. Select the role in the table, and then click the appropriate button.

1 results found for: **finance**

Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Finance Employees	Organizational Role for Finance	Finance	Static	Access Enabled	Role

Page 1 of 1 Total: 1 Displayed: 1 Selected: 0

- Change
- Delete
- Transfer
- Manage User Members...
- Manage Child Roles...
- Add User Members...
- Add Child Roles...**
- Manage Provisioning Policies...

5. Search for all the roles in the business unit of Finance.

Manage Roles

Manage Roles > Add Child Roles

Child roles inherit the entitlements from a parent role. To locate a role that you want to add to **Finance Employees** role, type information about the role in the field Search. The roles that match your criteria are displayed in the table below. By default, clicking Search will search the system based on the beginning letters of the pattern in the middle of an item, use the "*" symbol on the keyboard to indicate a wildcard. (For example, typing "b*" will find "abc".)

Search by
☐ Role name or description
☒ Business unit

Search Information

Roles

To add a child to the role, select the role, and then click OK.

6 results found for: *

Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static		
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static		
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static		
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static		
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static		
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static		

Page 1 of 1 Total: 6 Displayed: 6 Selected: 0

6. Select the three finance child roles:

- Asset Handling and Disposition
- Booking and Ledgers
- Comparison and Review

Roles

To add a child to the role, select the role, and then click OK.

6 results found for: *

Select	Name	Description	Business ...	Role ...	Access Status	Access Type
<input checked="" type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance	Static		
<input checked="" type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance	Static		
<input checked="" type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance	Static		
<input type="checkbox"/>	ITIM Administrators	Predefined system administrator role.	JK Enterprises	Static		
<input type="checkbox"/>	JKE System Admin	Organizational Role for System Administrators	JK Enterprises	Static		
<input type="checkbox"/>	System Account Owner	Organizational Role for System Account Owner	JK Enterprises	Static		

Page 1 of 1 Total: 6 Displayed: 6 Selected: 3

7. Click OK.
8. Select the Immediate radio button and click Submit.

Manage Roles

Manage Roles > Add Child Roles > Success

You successfully submitted the following role hierarchy changes to **Finance Employees** role:

- **Asset Handling and Disposition**
- **Booking and Ledgers**
- **Comparison and Review**

Your request will be processed on **Immediate**.

Other Tasks

[Continue working with roles](#)

[View my request](#)

Close

Exercise 5 : Creating a separation of duty policy

JK Enterprises wants to ensure that they adhere to the best practices of separation of duty in their finance department. In this exercise, you ensure that in the finance department, no user can have more than one of these roles: Asset Handling and Disposition, Booking and Ledgers, Comparison and Review.

1. On the Home tab, go to Manage Policies > Manage Separation of Duty Policies.
2. Click Create.

Manage Policies > Manage Separation of Duty Policies > Manage Separation of Duty Policies

To locate a separation of duty policy, type information about the policy in the field and then click Search. The policies that match your criteria are displayed system based on the beginning letters of the item you are searching for. To search for a textual pattern in the middle of an item, use the "*" symbol on the key to find "abc").

Search by

☒ Name or description
☐ Business unit
☐ Role name

Search information

Separation of Duty Policies

You can create, change, delete, or evaluate separation of duty policies. Select the separation of duty policy in the table, and then click the appropriate button.

<input type="button" value="Create"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	<input type="button" value="Evaluate"/>	<input type="button" value="Refresh"/>			
<input type="checkbox"/>	Select ^	Policy Name	Description ^	Business Unit ^	State ^	Violations ^	Exemptio...
		Total: 0 Displayed: 0 Selected: 0					

3. Create the policy with the following information:

Manage Separation of Duty Policies

Manage Policies > Manage Separation of Duty Policies > Create Separation of Duty Policy

Type the name of the separation of duty policy and enter a brief description. Select a business unit to which the policy applies and one or more owners you are done, click Submit.

+Policy name

ABCs of Finance

Description

Finance rules to maintain separation of duties

+Business unit

Finance

Policy Rules

You can add, change, or delete policy rules. Select an policy rule in the table and then click the appropriate button.

<div>CreateChangeDelete</div>			
<div>Select ^</div>	<div>Description of Separation ^</div>	<div>Allowed Number of Roles ^</div>	<div>Roles ^</div>
Total: 0 Displayed: 0 Selected: 0			

Policy Owners

Policy state

☒ Enabled
☐ Disabled

4. In the Policy Rules section, click Create to create a policy rule with the following information:
5. Click Search in the Build Role Separation List section.
6. Search for roles in the business unit of Finance:
 - Asset Handling and Disposition
 - Booking and Ledgers
 - Comparison and Review
7. After you select the three roles, select the number of allowed roles. In this case, you allow only one role.

Manage Separation of Duty Policies

Manage Policies > Manage Separation of Duty Policies > Create Policy Rule

Type a name for the policy rule and add two or more role names to the role list. Select the number of roles in the role list a us

*Description of separation
Finance department ABCs

Build Role Separation List

Specify a list of static roles that will restrict membership to the allowed number. Type the name of the role below and click . screen.

Search...

Quick Add

Role name

Add

Select	Name	Description	Business Unit
<input type="checkbox"/>	Asset Handling and Disposition	Organizational Role for Asset Handling and Disposition	Finance
<input type="checkbox"/>	Booking and Ledgers	Organizational Role for Booking and Ledgers	Finance
<input type="checkbox"/>	Comparison and Review	Organizational Role for Comparison and Review	Finance

Page 1 of 1 Total: 3 Displayed: 3 Selected: 0

Allowed number of roles

1

OK Cancel

8. Click OK.
9. Under Policy Owners > User Policy Owners, click Add, on next screen in search information type Sue Thomas , select full name in Search By. Click on search. Select Sue Thomas and click Ok. Sue, as the manager of the finance department, must approve any exceptions.

▼ Policy Owners

Role Policy Owners

Specify the roles that are the owners of this policy.

<input type="button" value="Add"/>	<input type="button" value="Remove"/>
<input type="checkbox"/> Select ^	<div>Role Name ^</div> <div>Role Description ^</div> <div>Business Unit ^</div>
Total: 0 Displayed: 0 Selected: 0	

User Policy Owners

Specify the users that are the owners of this policy.

<input type="button" value="Add"/>	<input type="button" value="Remove"/>
<input type="checkbox"/> Select ^	<div>Full Name ^</div> <div>E-mail Address ^</div> <div>Last Name ^</div> <div>Business Unit ^</div>
Total: 0 Displayed: 0 Selected: 0	

Policy state

- ☒ Enabled
☐ Disabled

Manage Policies > Manage Separation of Duty Policies > Select a User

To locate the users that you want to add as owners of this separation of duty policy, type information about the user in the table below. By default, clicking Search will search the system based on the beginning letters of the item you are searching to indicate a wildcard. (For example, typing "b*" will find "abc".)

Search information	Search by		
<input type="text" value="sue thomas"/>	<div>Full name ^</div>	<input type="button" value="Search"/>	<input type="button" value="Advanced..."/>

Users1 results found for: **sue thomas**

<input checked="" type="checkbox"/> Select ^	<div>Name ^</div>	<div>E-mail Ad... ^</div>	<div>Last Name ^</div>	<div>Business ... ^</div>	<div>Status ^</div>
<input checked="" type="checkbox"/>	Sue Thomas	sthomas@jk...	Thomas	Finance	Active
Page 1 of 1		Total: 1 Displayed: 1 Selected: 1			

Manage Policies > Manage Separation of Duty Policies > Success

You successfully submitted a request for a new separation of duty policy.

- Policy name: **ABCs of Finance**
- Description: **Finance rules to maintain separation of duties**
- State: **Enabled**
- Business Unit: **Finance**

Policy Rules:

- Finance department ABCs

Other Tasks[View my request](#)[Manage roles](#)[Manage provisioning policies](#)[Continue working with separation of duty policies](#)

10. Click Submit.
11. Log out of the IBM Security Identity Manager Administrative Console.
Close Firefox.

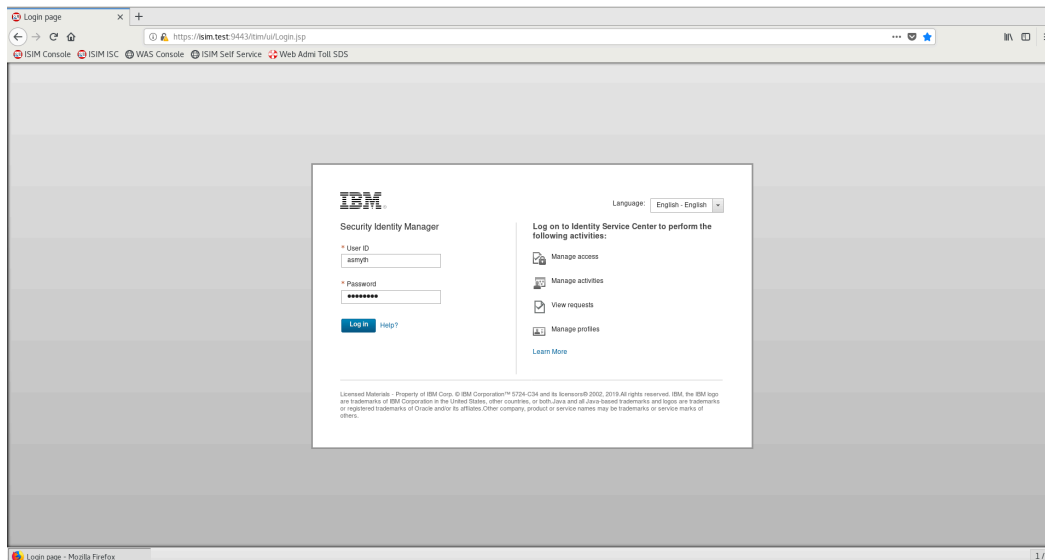
Exercise 6 : Approving a separation of duty policy violation

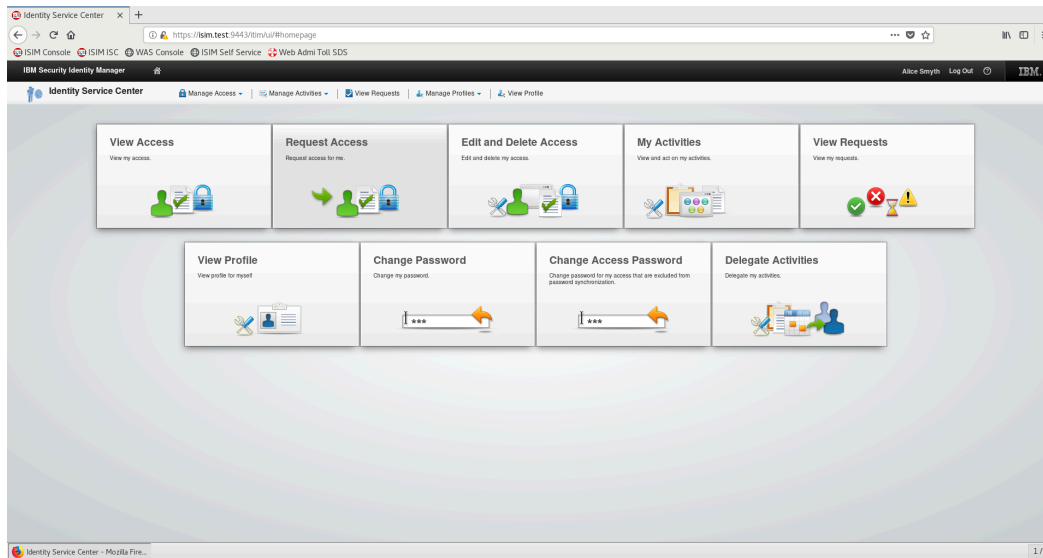
Alice Smyth is covering for another finance employee who is out on temporary medical leave. She requires access to several roles that violate a separation of duty policy. Alice requests role access through the IBM Security Identity Manager Identity Service Center (ISC) console.

1. Restart Firefox everytime you switch ISIM Console to ISC console. Open Firefox Enter the URL for

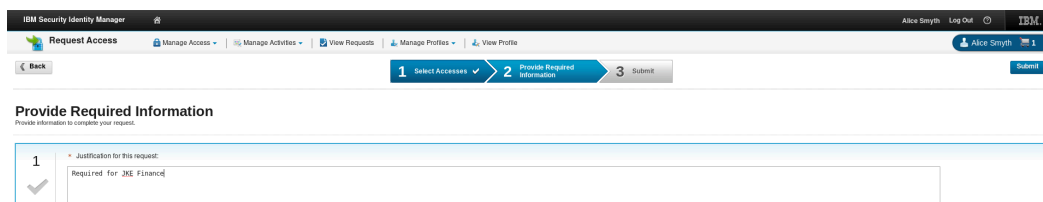
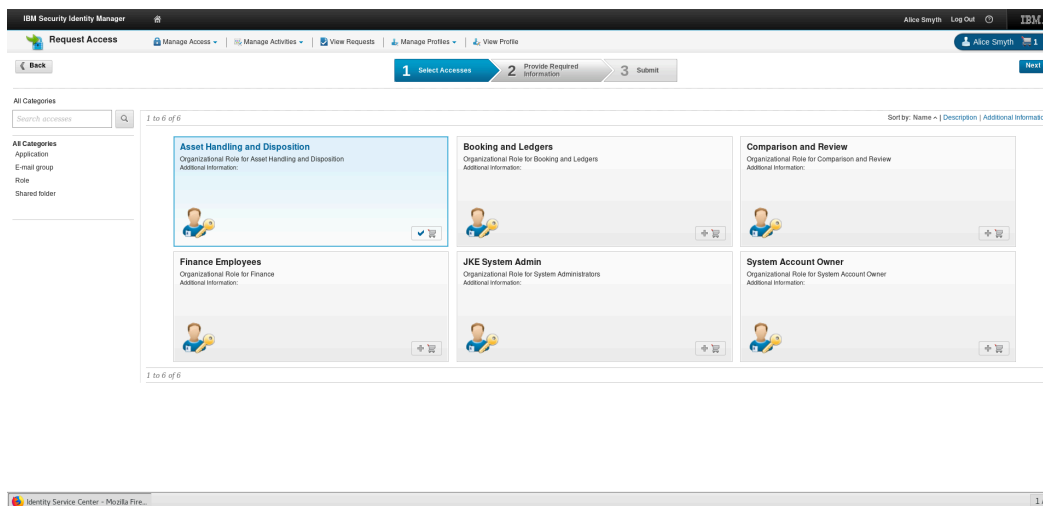
the Identity Service Center (ISC) in Firefox:

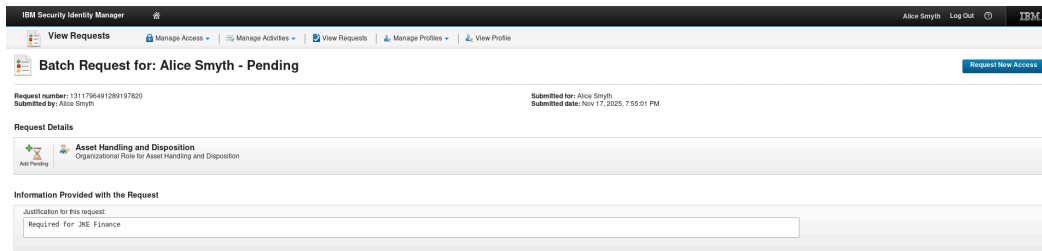
`https://isim.test:9443/itim/ui/Login.jsp` or click the bookmark
2. Log on as Alice Smyth (asmith) with password P@ssw0rd.





- Click Request Access to request access to the Asset Handling and Disposition role by Clicking the role and Click Next. Provide justification – Required for JKE Finance and Click Submit.

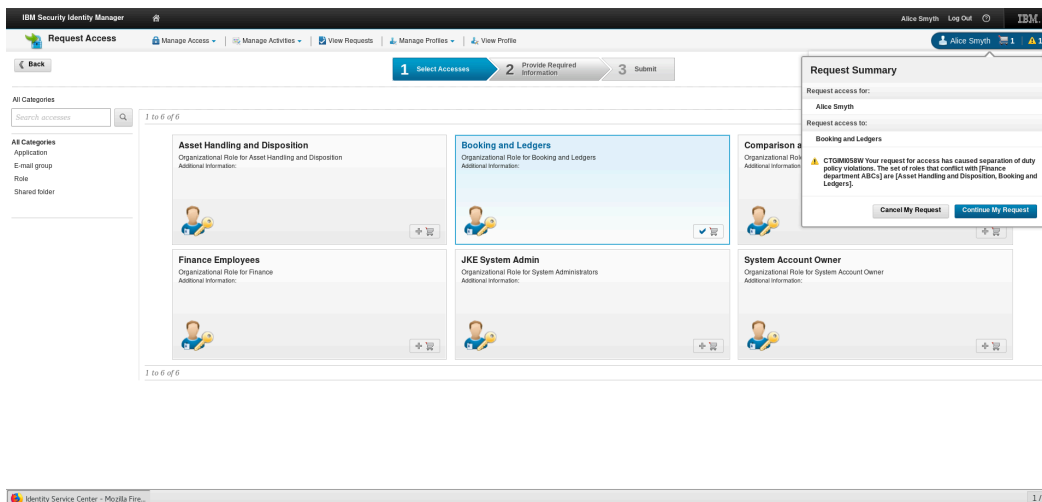




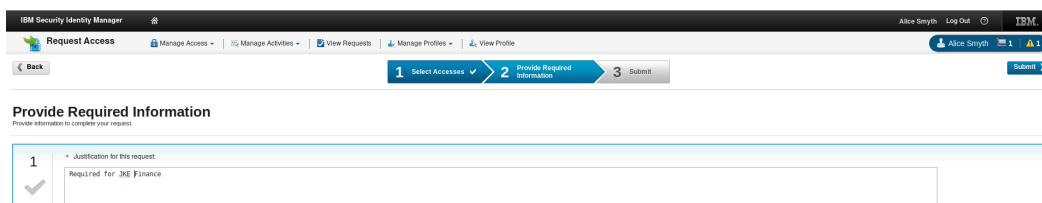
- Click on Request New Access, Request access to the Booking and Ledgers by Clicking the role.

This action causes a violation for the Finance Department ABCs separation of duty policy. You can see the warning sign

- Click the Yellow warning sign, you can see the details for the violation.



- Click Continue My Request to request an exception. Provide justification – Required for JKE Finance and Click Submit.



IBM Security Identity Manager

Alice Smyth Log Out IBM

View Requests | Manage Access | Manage Activities | View Requests | Manage Profiles | View Profile

Batch Request for: Alice Smyth - Pending [Request New Access](#)

Request number: 1313260193931669423
Submitted by: Alice Smyth
Submitted date: Nov 17, 2023, 8:00:42 PM

Request Details

Booking and Ledgers
Organizational Role for Booking and Ledgers

Information Provided with the Request

Justification for this request:
Required for J&J Finance

7. Log out of the Identity Service Center.
8. Now, log in to the Identity Service Center as Sue Thomas and approve the separation of duty exception. Log back in as Sue Thomas (sthomas) with password P@ssw0rd.

IBM

Language: English - English

Security Identity Manager

* User ID
sthomas

* Password
●●●●●●●●

[Log in](#) [Help?](#)

Log on to Identity Service Center to perform the following activities:

- Manage access
- Manage activities
- View requests
- Manage profiles

[Learn More](#)

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IBM Security Identity Manager

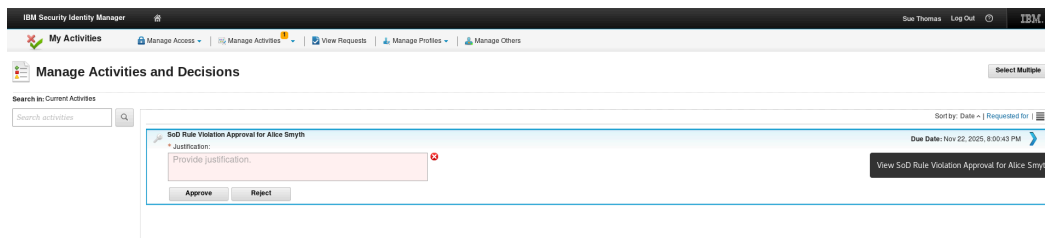
Sue Thomas Log Out IBM

Identity Service Center | Manage Access | Manage Activities | View Requests | Manage Profiles | Manage Others

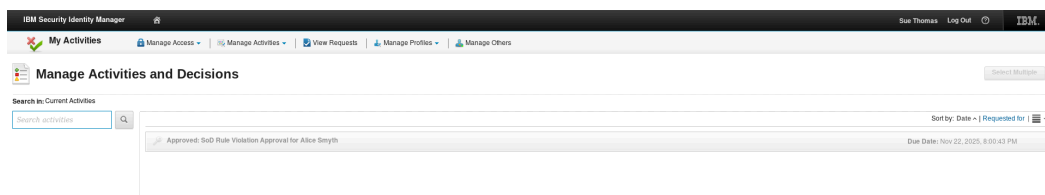
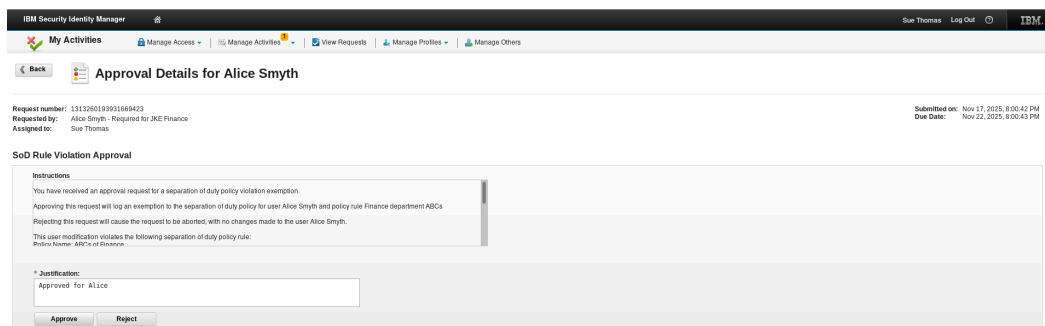
View Access View my access.	Request Access Request access for me.	Edit and Delete Access Edit and delete my access.	My Activities View and act on my activities.	View Requests View my requests.
View Profile View profile for myself.	Change Password Change my password.	Change Access Password Change password for my access that are excluded from password synchronization.	Delegate Activities Delegate my activities.	

Identity Service Center - Mozilla Firefox 1 / 4

9. Click on My Activities, on the right corner you can see Blue arrow , Click the arrow and you can see the policy violation details.



10. Provide Justification – Approved for Alice. Click Approve and Approve Alice's separation of duty rule violation.



11. Log out of the Self Service console. Close Firefox.