VU Identity – Overview for VU Administrators (VSA)
VU Identity – What’s changing?

- AccessVU will become a VUMC tool, to be replaced on the VU side with VU Identity, a brand new Identity system.
- University side VSAs and end users will use VU Identity instead of AccessVU to interact with the identity system. VUMC users will continue to use AccessVU.
- Existing VSA links will point to AccessVU, and a new set of links will replace them and point to VU Identity e.g. account claiming, password reset, re-authenticating an account.
- Not all existing functionality will be replicated at initial go-live in June. The Identity team plans to release all tools throughout the end of the 2018 calendar year. Essential tools were given priority and most will be available at the end of June.
VU Identity - What’s not changing?

- VU Services Administrators (VSA) will continue to assist with various enquiries and facets of managing VU Identity accounts as before, such as:
  - Creating and claiming new accounts
  - Re-setting passwords
  - Extending contractor/affiliate accounts
  - modifying personal options, such as preferred email addresses
  - Creating shared mailboxes

- Policies relating to account administration will remain the same, such as password polices, account expiration dates etc.

- Support for administrators will continue to be provided by Partner Support
Home Page

- When you login, you’ll notice a very different layout.
- The main menu bar in gold will allow for site preferences to be set and tracking work requests in future implementations.
- Unlike AccessVU’s horizontal menu bar, VU Identity’s main menu system for user account management is accessible via the ‘Hamburger’ icon in the top-left.
- The main body of the page will be further utilized in future VU Identity releases as more functionality is released. For now, there is no requirement to engage with the Access/Request tools in the homepage.
Accessing the Menu Options

• Clicking on the hamburger icon opens up the menu options. This will vary by user depending on the privileges for the role assigned to you.

• The menu options have retained the names they had in AccessVU.

• Click on the appropriate option to view a sub-menu of options under the heading.

• Additional/replacement/upgraded menu options will appear in future implementations.
Searching in VU Identity

- Opening a menu option will prompt you to search for an account.
- You can search by exact VUnetID or enter partial data to widen the search results (no wildcards are required) e.g. rowla would find ID rowlanew and any others that start with rowla.
- For full name searches, search in format Last Name, First Name as per Outlook/Directory display name, rather than First Name Last Name.
- AccessVU allowed you to search partial strings, providing you selected an option menu first, with VU Identity it’s built-in for ease of use.
- You can search by name, full or partial, as well as VUnetID using the single search box as opposed to using boxes for each in AccessVU.
- You need to click on the record retrieved in the search results to open up the profile.
This feature allows to search records based on certain properties, such as employee ID, status, manager name etc.

- Allows far greater flexibility and searching refinement than AccessVU.
- Once search criteria is entered, click the Search button in the bottom right:

- Reset clears the criteria to allow a fresh set to be entered.
Dynamic searching on options with a drop-down icon, allows you to select from a dynamically populated list based on the text entered.

Once the dynamic search has identified the user, you’ll need to click the search button to retrieve the record details.
View User Profile

- Click on a record from the search results to view it.
- Information is divided into 3 sections/tabs, Attributes, Entitlements, Application Accounts.
- Allows a greater breadth of information to be viewed on a user than in AccessVU by combining information that was previously held in multiple places.
- Clicking the ‘Cancel’ button in the bottom left takes you back to the search screen.
- Default screen is Attributes, which closely matches the user account screen in AccessVU.
Attributes

- This shows the primary, headline attributes of an account, such as username (VUnetID), Name, Status of account (Elevated, Disabled), Dept number and Job Title.
- Corresponds to the information shown on the user profile page in AccessVU.
Entitlements

- Provides details of any Roles and Entitlements the user has against their record
- **Roles** - grant various types and levels of access, such as the minimum privileges required by an individual to perform his/her job.
- **Entitlements** - represent individual system permissions.
- Roles and Entitlements allow administrators to manage access to their applications and supports compliance requirements around security and privacy.
Application Accounts

- View information from the accounts of the user in linked applications, such as Active Directory (AD) and EPI (Enterprise Person Index).
- Clicking the blue drop down icon opens up the section to display the data held for that user in the corresponding application.
Manage User Menu Options

- The names of the user options have been carried over from AccessVU.
- All the menu options are accessible via the hamburger icon in the top left of VU IDentity.
- You will have access to the same functionality you had previously - although some will be deployed in later phases.
- Some options have an additional sub-menu to perform the action for your own account to save having to search for your own record, as below (For me/For others)
Update Cell Number

• Search for the user record, then click on the record from the search results to open the Update Cell Number form.
• Enter the new number and click Continue to update the number held against the account.
Set Service Disable Date

- Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
- The first screen provides an overview of what the tool is and isn’t to be used for. Click Next to proceed or Cancel Request to return without making any changes.
- Enter a new disable date manually in the mm/dd/yyyy format or select from the Calendar widget.
- Enter the VUnetID of the requestor to record who made the request.
- Add any comments, such as SerVU ticket numbers and click Continue.
- You will have an opportunity to review your request before either confirming or cancelling.
Disable Account

- Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
- Review the ‘About’ information to be sure this is the action you wish to take and click ‘Next’ to proceed.
- Confirm the VUnetID section is showing the correct person, then submit to open up the main form.
- Do not tick the Password Expiry, vLDAP or Separated Delivery options unless expressly told to by HR/Security.
- Enter the date the account will be manually disabled, the ID of the requestor and any comments, then click to disable account.
- The status of the account will show as ‘Manual_Service_Disabled’ in VU Identity.
Enable Account

- Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
- Review the ‘About’ information to be sure this is the action you wish to take and click ‘Next’ to proceed.
- Confirm the VUnetID section is showing the correct person, then submit to open up the main form.
- Enter the requestor VUnetID or start typing their last name to use the dynamic search option.
- Enter any comments relating to the re-enablement, review and click to enable the account.
- The account will now show as ‘Elevated’
Set account in re-auth

• Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
• Confirm the correct account is selected to be re-authenticated.
• Enter the requestor VUnetID or start typing their last name to use the dynamic search option. Enter any comments and continue.
• You have an opportunity to review the request before either going back, cancelling out entirely or confirming the request.
• The ‘Claim Status’ attribute on the user profile will change to ‘False’ to indicate the account needs to be claimed again (re-authenticated)
Change privacy settings

• Changes whether a record is hidden from the Directory or not.
• Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
• Review any informational messages, click next to proceed.
• Enter requestor name and any comments and click to confirm that changes.
Set Display Name for a User

- This tool is used to update the user’s display name in the GAL (global address list in Exchange/Outlook)
- Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
- Confirm the correct account is selected and click ‘Submit’
- Make the required amendments to the First and Middle names (where applicable) and click ‘Confirm’
- If a change to the last name is required, then the user will need to contact HR (staff) or the Registrar’s Office (student) first to arrange for that to be amended.
- You will have a chance to review the changes before a final confirmation.
Manage User Email

- To set up a new preferred email address for an account
- Up to 2 addresses can be entered in addition to the permanent email address
- Where available, the option to choose an alias domain for the preferred address
Set preferred email address.

- This tool is used to set a new preferred email address for a user.
- Selecting the menu option opens the search screen. Search for the record you want and select it from the search results to open the form.
- Enter up to 2 alternate email addresses (up to the @ sign), choosing the appropriate domain from the options on the right, if applicable.
- Once entered, set the preferred email by selecting the chosen email from the drop-down and clicking 'Continue'.
- Review the changes to be made on the next screen and submit.
- It can take up to 12 hours for the change to reflect in the GAL.
- The permanent email, and any other alternatives entered, remain as working aliases, but they will be hidden from the GAL.
Manage Invited Users

- Replicates the Create User>>Invite User functionality in AccessVU
- Provides you with the VUnetID at the point of sending the invite. You
- Entering the First, Last name information is now compulsory
Create invited user – Name and Service Profile

- Enter the name information for the new user and an email address to be used to send them the invite. Only First and Last names are compulsory. Check spelling.
- Choose the appropriate profile for the user. Most invitations are likely to be ‘Contractor’, aka Affiliates.
- The profile will automatically assign the profile the appropriate resources to the account.
- All profiles assign a mailbox by default, with the exception of the ‘Contractor no email’ and ‘Custom’ profiles.
- ‘Custom’ allows staff with the requisite permissions to only assign specific resources to an account. If you do not have those permissions, the options will be read-only.
- If the account requires PII from the user (SSN, DOB info) tick the appropriate box. If in doubt leave it un-ticket as PII can be entered later if required.
Create invited user –Org, Dates and Requestor details

- With the ‘VU’ option selected, a drop-down will appear with a list of Organizations to select to associate the ID to. The ‘Load More’ option will expand the initial list. If the specific department/school is not listed, choose the closest.

- Set the appropriate account expiration date. For invited users this is a maximum of 1 year out, with the exception of invited faculty who can be set a date that matches the end of the term of their appointment as shown on their letter from the Dean.

- Set a date for the expiration of the invitation itself. Limit to 1 month to ensure open invitations are current and relevant.

- The invitation will appear to the invitee to have come from NoReply@Vanderbilt.edu unless you change it here.

- Enter the ID of the requestor, or start typing their last name to use the dynamic search option.

- Continue through to the review screen. Click ‘Back’ to make any changes, or ‘Submit Request’ to complete.
Who does a VSA contact for help?

**VUIT Partner Support**: 615-936-4877 (Option 2)
vuit-partner@vanderbilt.edu

Submit a ticket through SerVU when deployed or Pegasus

Further documentation will become available as VUIT website redesign in brought online this summer.