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Delegated User Administration Getting Started Guide

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Topics

Overview.....	3
How Does It Work?	4
Key Concepts	5
External Users – Flow of Work	6
Delegated Administrator – Prerequisites	7
Delegated Administrator – Flow of Work.....	8
Delegated Administrator – Other Duties.....	8
Notes	9
Troubleshooting – Simple Solutions.....	10
Support Resources.....	12

Overview

Our Identity & Access Management (IAM Portal)

- Gives your employees the right to access NCDOT construction data resources
- Lets your employees see and use only the content appropriate for their job
- You may also hear the access management system called: Optimal, Optimal IdM, OFIS, Delegated User Administration, or Delegated Admin

How Does It Work?

1. Your company enrolls in the access management system
2. Your employees request access to your construction team sites
3. Your DAs (designated at enrollment) approve (or deny) those requests
4. All approved employees will all have the same level of access
 - Office Personnel – time sheets, financial reports
 - Construction Field Personnel – road plans, bridge specifications
 - Construction Managers – inspection reports, progress reports

Office Personnel



Construction Field Personnel



Construction Manager



Employees will have *read only* access to some content, and update or *contributor* access to other content

Encourage employees to focus on the team site content that's most relevant to their job responsibilities

Key Concepts

Identity & Access Management (IAM) Portal

- Web application that allow Delegated Administrators to approve/deny entitlement requests submitted by your users.

Authorized Representative

- An officer of your company authorized to sign on behalf of company and who enrolled the company in the access management system

DOT Business Owner

- Your NCDOT contact – probably the person who helped enroll your organization in the access management system. If you don't know who it is, ask your Authorized Representative.

External User

- Company employees approved to use the team sites

NCID (North Carolina ID)

- An account that's required for external access to any state computer system

Entitlement

- Access to electronic resources, data files, folders, or web application

Delegated Administrator (aka DA)

- The person who receives entitlement requests for your company and determines whether to approve those requests

External Users – Flow of Work

First, let's learn how an external user makes an entitlement request. It will help you

- Understand the information in an entitlement request
- Train your users on how to make an entitlement request
- Troubleshoot minor problems you or your users may encounter

After this, we'll move to the DA role to see what they do with entitlement requests when they receive them

Olivia in the Office



Fred in the Field



Mike, the Manager



- Olivia, in the office, needs to upload payroll information for NCDOT
- Fred, in the field, needs to upload some changes to a design plan
- Mike, the Manager, needs to upload a daily report

Each External User Must:

1. Register for an NCID (<https://ncid.nc.gov/>); an NCID belongs to the individual, not the company.
2. Login to the Access Management system at <https://iamportal.services.ncdot.gov/ofis>
3. Request access to Construction Team Sites (a.k.a. Request Entitlement)
4. Receive an email that approves or denies their request
5. If approved, the DA instructs them on how to test their access to the construction team site

Get step-by-step instructions for this process, with screen shots here:

<https://connect.ncdot.gov/help/Delegated%20Administrators%20Docs/Procedures%20for%20External%20Users.pdf>

Delegated Administrator – Prerequisites

To be a DA, you must

1. Request an NCID (<https://ncid.nc.gov/>)
2. Be designated by your organization's Authorized Representative.
3. Receive an email confirming your role as a DA for your organization

Delegated Administrator – Flow of Work

Now that you understand how an external user makes an entitlement request, what do Delegated Administrators do with those requests?

1. Receive an email containing a user's entitlement request
2. Log on to the Access Management system <https://iamportal.services.ncdot.gov/ofis>
3. Approve or Deny the entitlement request
4. Ask the user to confirm their access to your organization's NCDOT construction project team sites.

Get step-by-step instructions for this process, with screen shots here:

<https://connect.ncdot.gov/help/Delegated%20Administrators%20Docs/Procedures%20for%20Delegated%20Administrators.pdf>

Delegated Administrator – Other Duties

Remove User from Organization

1. Log on to the Access Management system <https://iamportal.services.ncdot.gov/ofis>
2. Remove users from the organization – within 48 hours of departure!

Certify Membership of the Organization

1. Log on to the Access Management system <https://iamportal.services.ncdot.gov/ofis>
2. Remove any user from the organization who no longer needs access.
3. Certify that all remaining organization members are accurate.

Notes

- External users cannot belong to more than one organization at a time
- A Delegated Administrator cannot be a DA for more than one organization at a time
- DA cannot approve their own entitlement requests
- DA can approve or deny entitlement requests from other DAs
- DAs need to understand enough about SharePoint to help your external users navigate the team sites
- Emails you might receive include notifications that
- You've been assigned the role of DA for your organization
- Your role as a DA has been updated
- Your organization has been removed from the access management system
- You have a user who is requesting entitlement access.
- You need to certify your organization's membership.

Troubleshooting – Simple Solutions

- If external users don't know their NCID, tell them to
- Go to the NCID page (<https://ncid.nc.gov/>)
- Click Forgot your User ID?
- Complete the form and click Search
- The NCID is sent to the email address entered in the form
- If users can't log on, tell them to
- Log on to the NCID web site to verify their NCID is valid
- Look under Update My Account to check that their NCID is associated with the correct email
- If users need to change the information in a pending entitlement request
- Deny the original request and tell them to resubmit
- If users don't receive an email indicating whether their entitlement request was approved or denied, tell them to
- Check their junk mail folder
- For additional help
- Check the help page: <https://connect.ncdot.gov/help/Pages/Delegated-User-Administration.aspx>



- Contact the DOT Business Owner if
- The system isn't available
- Users can't log on
- Users can't choose their entitlement or organization
- The correct entitlement or organization for a user is not listed
- Users can't enter details
- Users can't submit an entitlement request
- Users don't receive an email indicating whether their entitlement request was approved or denied
- DAs can't view current or pending requests
- User requests are not in the pending requests list
- DAs can't approve or deny requests
- DAs can't select requests to review
- DAs can't find the user with the search function
- A user is approved but not added to your organization
- A user can view content that should not be accessible



Support Resources

Help for Delegated Administration on Connect NCDOT:

- Overview
- Download registration package • Submit registration package

<https://connect.ncdot.gov/help/Pages/Delegated-User-Administration.aspx>

SharePoint Help on Connect NCDOT:

- End User = External users with Read access
- Contributor = External users with Read/write access
- How-to set up alerts, navigation, etc.

<https://connect.ncdot.gov/help/SharePoint-Training/Pages/default.aspx>

Help for construction team sites on Connect NCDOT:

- Changes to construction team sites

<https://connect.ncdot.gov/site/construction/Pages/default.aspx>

(Approved entitlement request required to access this site)