

RIMS

Rowan Identity Management System

Quick Reference Guide

Training & Instructional Support


www.rowan.edu/irt-training

Overview

The Rowan Identity Management System (RIMS) is a web-based application designed to collect hierarchical data from the top down and facilitates management by clarifying relationships, defining roles, levels of authority, and supervisory or reporting lines. Supervisors (or their proxies) create an organization, job titles, positions and assign users to each position that they directly supervise. Before you begin, determine which employees report directly to you, and what their titles are. You will need this information before you enter anything into RIMS.

Log on

Log on to rims.rowan.edu from any modern web browser. Select your **Active Position**. Your **Active Position** is the position you are entering information for during the current session. If you are acting on behalf of someone else, you will set your **Active Position** as the person's **Proxy**. **Submit**. If you do not have an active position, your supervisor has not added you to RIMS yet. You must contact your supervisor to enter you into RIMS.



Rowan Identity Management System

A single location to *collect, update, and maintain* Rowan University organizational and reporting data.

This data will be used to:

- Create electronic organizational charts for all University departments, eliminating the need for manually created charts that constantly need to be updated.
- Allow timely access for newly assigned employees to services such as wireless network, email, library services, door access, Blackboard, Banner, etc.
- Provide up-to-date information for the online directory.

Please choose your active position:

Technical Trainer and Instructional Designer - Erica King

Technical Trainer and Instructional Designer - Erica King

Proxy For: Manager - Marybeth Hegel

Terms

Organization - This is the department or division name. Only create the level you are responsible for.

Job Title - Use descriptive job titles like “Trainer” instead of “Professional Service Specialist”. If you have three trainers you will only need to create this **Job Title** once.

Proxy - Supervisor may assign a **Proxy** to act on their behalf in RIMS.

Role— Your primary function as determined by Human Resources.

Position/Opening - An **Opening** must be created for each person that occupies a **Job Title**. For example, if you have three trainers, then three openings must be created for the **Position** “Trainer”.

Unoccupied Position— When you create a **Job Title** and select the amount of openings for that position, they are considered **Unoccupied Positions** until you choose **Assign User to Position** to add an individual to that position.

User/ Person - The terms **User** and **Person** are used interchangeably throughout RIMS. **User** often refers to the individual currently logged into the application adding information.

Organizations, Job Titles, and Positions

To create an **Organization**, select the **Requests** menu and choose **Submit Request**.

Under the section **Create your organizational chart** you are able to create a **New Organization**, a **New Job Title**, or a **New Position**. All of these can be created during one session. It is not until you **Assign User to Position** under the **Add people to your organizational chart** option that all the changes you have made will be submitted to your supervisor for review and approval. You can wait for approval from your supervisor, or if your supervisor has a **Proxy**, or person acting on their behalf in RIMS, that **Proxy** can approve or deny the requests. The supervisor can deny a request but will be expected to provide feedback when it is denied as to why. If a request is denied, the person submitting will resubmit based on feedback.

Many of the tasks you will need to perform in RIMS are available at the top of the **Submit Request** page, accessible by selecting **Requests** and then **Submit Request**.

Create an Organization, Job Title, and Position

Click **Requests** on the menu bar at the top and then **Submit Request**. Choose the first option to create a new **Organization**, **Job Title**, and **Position/Opening**. The form for **Create A New RIMS Entry** will ask you for the information needed to create a new entry. If your **Organization** and **Job Title** are already listed, select them from the drop down menu. When you are done, select **Submit**. If you have created an opening for a **Position**, you can complete the next step of **Assigning a User to Position**.

If your **Organization** and **Job Title** are not already listed, select **Create New** and fill out the information for a new organization.

If **Job Title** is not already listed select **Create New** and fill out the name of the new title. Then select the type of **Role** and how many openings you need to create. For example, if you have three trainers, then three openings must be created for the **Position** "Trainer" and **Submit**.

Assign User to Position

On the **Submit Request** screen choose the second option **Add people to your organizational chart**. Find the user by email, Banner ID or name. Select the correct person. Assign the user to an empty position from the menu and **Submit**. **Assign User to Position** triggers your supervisor to approve not only the **User** in the position, but also the new **Organization, Job Title**, and **Position**. Wait for approval from your supervisor. Your supervisor may deny the request and leave feedback as to why. Submit the information again with the changes suggested.

Submit Request - Assign User to Position

Find a User By:

Last Name

Savage

Search

Selected User:

Jennifer Savage - savagej

Select an empty position:

- Select One -

- Select One -

Trainer - Unoccupied - Erica's organization again


Trainer - Unoccupied - Erica's organization again


Trainer - Unoccupied - Erica's organization again

Assign a Proxy to Your Own Position

Select **Requests** from the home page. At the bottom of your screen choose **Assign a proxy to your position**. Find the user by email, Banner ID or name. Select and **Submit**. Wait for approval from your supervisor.

Proxy options:

 Assign a proxy to your position


 Remove a proxy from your position


Maintain your Organizational Chart


If you do not need to make multiple entries and want to perform one task, you can use the **Maintain your organizational chart** menu. The menu includes options such as **Updating the name of your Organization**, **Removing a Person from a Position** if a person leaves and **Removing an unused Job Title** among others.


Options like **Updating the name of your Organization** is useful if your organization has changed names. **Update a Job Title** is used if your job title or a job title in your organization has changed. It is best practice to **Remove an unoccupied Position** if you have created a position that is now not needed. The same best practice applies to **Remove an unoccupied Organization** if one has been created that is no longer needed.


Maintain your organizational chart:


 Create New Position


 Update the name of your Organization


 Update a Job Title

 Update a Position

 Remove a Person from a Position

 Remove an unoccupied Position

 Remove an unoccupied Organization

 Remove an unused Job Title

If a person in your organization takes a new position within the organization, first use **Remove a Person from a Position**. That removal will need to be approved by a supervisor. After the removal is approved, the person will be assigned to another unoccupied position or if they are beginning in a new position that did not exist prior, the option to **Create New Position** will be used, followed by the option to **Assign User to Position** to add them to their new job. All removals require a supervisor's approval.

Set Active Position

If you have more than one position in RIMS or you need to log in as a **Proxy** for someone else you will need to **Set Active Position**. Go to the user menu on the top right and choose **Set Active Position**. You can change your active position from here using the drop down menu. Then select **Submit**.

Approve or Deny a Request

A supervisor or **Proxy** for a supervisor may need to approve or deny a request. If you log into RIMs and see a red box to the right of the **Requests** menu with a number it means there is a pending request that needs your attention. When you click on the **Requests** menu you should see a red box next to the section requiring an action.

Approve or Deny Pending Requests

ID	Submitted By	Submitted On	Status	Summary	Comments	Approve	Deny	No Decision
26234	Erica King	05/22/18 1:55 PM	pending	Assign user Jennifer Savage to position Instructional Designer - Erica's New Organization	<div>Change org name to Instructional Technology</div>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Submit

Approve or Deny Pending Requests


ID	Submitted By	Submitted On	Status	Summary	Comments	Approve	Deny	No Decision
26234	Erica King	05/22/18 1:55 PM	pending	Assign user Jennifer Savage to position Instructional Designer - Erica's New Organization	<div>Change org name to Instructional Technology</div>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Submit

If there is a pending request that can be approved, click the **Approve** option and select **Submit**. If any changes need to be made, deny the request and leave a comment with the reason it is being denied. This will provide the requester with information to make needed changes.

Set a Preferred Position

If you have more than one position in RIMS you can change your **Preferred Position**. Under the **Identity Info** select **User Info**. Click on **Update Preferred Position**, select the new position and click **Submit**.



Requests

Identity Info

User

?


Help

User Information

To update these fields, please use Banner Self Service

User	
Full Name:	Sahana K. Varadaraju
Preferred First Name:	Sahana
Display Name:	Sahana Varadaraju
Email:	varadaraju@rowan.edu
Preferred Position:	Reporting Analyst
Campus Phone:	256-4174
Extension:	2323
Building:	Memorial Hall

C *Update Preferred Position*

 RIMS

Requests

Identity Info

User

Help

Update Preferred Position

Current Preferred Position: Reporting Analyst

Positions available to Update:

Analyst

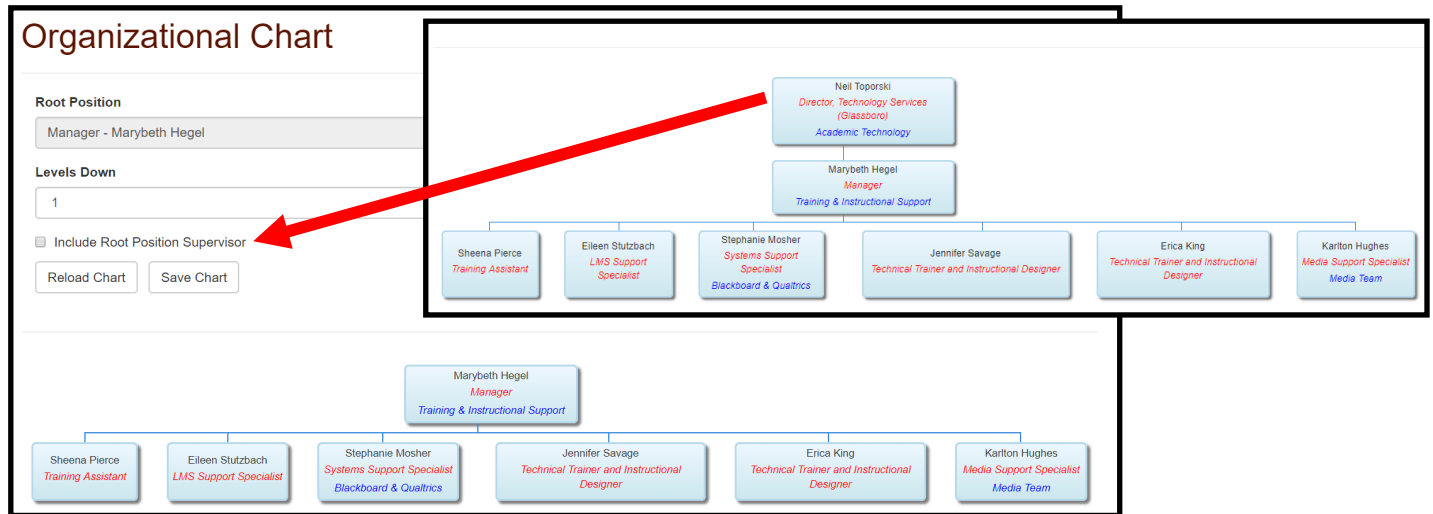
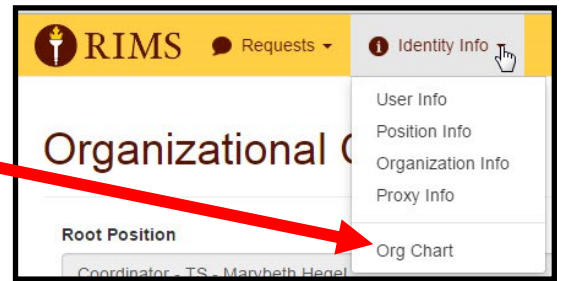
- Select One -

Analyst

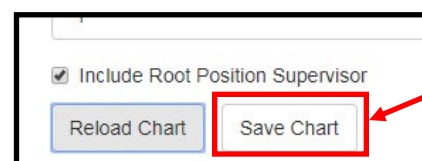
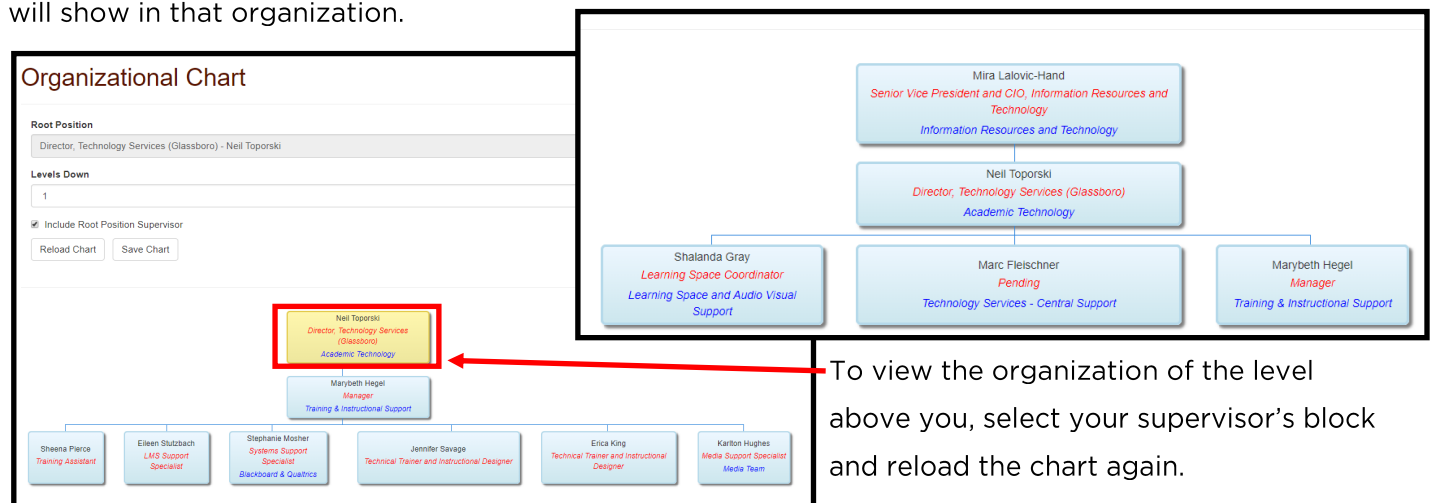
Submit

Organizational Charts

RIMS will allow you to create organizational charts. You are able to choose the number of levels to display. To view your organizational chart, select **Identity Info** and then **Org Chart**.



The **Root Position** is your **Active Position**. To include your supervisor, select the check box next to **Include Root Position Supervisor**, then select **Reload Chart**. All job titles will show as “Pending” until they are approved by Human Resources. Unoccupied positions will show as “Unoccupied”. If you created multiple organizations, only one organization will show in the organizational chart, and everyone who reports to you will show in that organization.



Select **Save Chart** to download the organizational chart as a .png image file.

View Request Options

The **Requests** menu has options to view **Pending Requests** that you or your supervisor, if you are acting as your supervisor's **Proxy**, have denied or approved in the past. You can also view **Pending Requests** that require attention or action. Items requiring action will have a red number beside them. If you have submitted a request that requires approval, there will be a **Pending With** section to see who must approve the request.

View Active Position's Pending Requests

ID	Submitted By	Submitted On	Status	Pending With	Summary	Comments
27015	Mark Zeits	05/31/18 4:18 PM	pending	John Reiser	Assign user David Halloran to position Senior Analyst - Information Systems Development & Maintenance	<input type="text"/> <input type="button" value="Revoke"/>
27016	Mark Zeits	05/31/18 4:18 PM	HR pending	HR	HR Approval - Assign user Bharathwaj Vijayakumar to position Senior Analyst - Information Systems Development & Maintenance	<input type="text"/> <input type="button" value="Revoke"/>

Requests 1 Identity Info

- Approve or Deny Pending Requests
- Requests Active Position has Approved
- Requests Active Position has Denied
- Requests Active Position's Reportees have Revoked
- Active Position's Pending Requests 1
- Active Position's Approved Requests
- Active Position's Denied Requests
- Active Position's Revoked Requests

Email Notifications

Email notifications will be sent daily for all who have actionable RIMS item requests relevant to their positions. The information in the email only includes activities since the last email. Items include position assignments and assignments as a **Proxy**. Occasionally an email will be sent if there has been no activity within your organization. This is a friendly reminder to periodically check your organization to ensure it is up to date and accurate.

Rowan Identity Management System proxy user digest for Jeanie Riebe

Activities for Mira Lalovic-Hand - Senior Vice President and CIO, Information Resources and Technology from 01-Jun-2017 to 02-Jun-2017

Direct report activities of this Position

Request ID	Description	Submitted By	Approval Supervisor	Request Date	Status	Notes
2469	Remove user Nichelle Peaks from position Assistant Director	Patrick Chadd	Mira Lalovic-Hand	June 02, 2017 11:54:53	Revoked	None
2470	Update current organization Technology Services Stratford to be of type Structural and have a title of Technology Services Stratford and a shortname of TS Stratford	Patrick Chadd	Mira Lalovic-Hand	June 02, 2017 11:55:14	Revoked	None

Activities performed by proxy users are shown as **block**

From: RIMS
Sent: Tuesday, April 24, 2018 9:10 AM
To: Riebe, Betty Jean
Subject: Your RIMS Organization May Need Updating

Hello Betty Riebe,

As a supervisor or proxy, you are responsible for maintaining information about your organization, **IRT Administrative Staff**, in the Rowan Identity Management System (RIMS). Please review the information below to ensure it is up to date. If the information is not accurate, log into <https://rims.rowan.edu> and make any necessary changes.

If you have questions or need additional training to create, assign, remove or update information about your organization in RIMS, please contact support@rowan.edu.

Banner ID	Name	Title	Role
	Elaine Watson	Senior Clerk Typist	Secretarial
	Olivia Trachtenberg	Program Assistant	Staff
	Shante Walker	Program Assistant	Staff

Thank you!
Information Resources & Technology (IRT)