RIMS

Rowan Identity Management System

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Download the latest version of this document at
http://www.rowan.edu/hr/rims

October 2017
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
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<td>1.0</td>
<td>12/16/16</td>
<td>Marybeth Hegel</td>
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<td>1.1</td>
<td>12/23/16</td>
<td>Marybeth Hegel</td>
<td>Formatting (page numbers)</td>
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<td>3/24/17</td>
<td>Marybeth Hegel</td>
<td>Added Revoke and HR page</td>
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<td>1.3</td>
<td>4/5/17</td>
<td>Marybeth Hegel</td>
<td>Added Survey Link</td>
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<td>9/8/17</td>
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<td>Added new functionality information.</td>
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<td>1. If a supervisor creates more than one organization, only the first one will show in the org chart, and all the positions will show reporting to that organization (p 22).</td>
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<td>2. To view the org chart of your supervisor (p 22).</td>
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<td>5. Description of roles in drop down menu (p 13)</td>
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<td>6. Daily email for actionable items (p 25)</td>
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<td>7. Email reminder every 60 days to update (p 25)</td>
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<td>8. Contact supervisor if you don’t have an active position (p 8).</td>
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<td>9. Added correct survey link and QR code (p 26).</td>
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<td>1.5</td>
<td>10/05/17</td>
<td>Marybeth Hegel</td>
<td>Updated screen shots for reviewing approvals (p 17)</td>
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RIMS 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 will be responsible to collect, update, and maintain their employee data in RIMS for efficient and accurate organization and reporting.

The benefits of RIMS include:

- University departments can easily create accurate electronic organizational charts eliminating the need for manually created charts that constantly need updating.
- Employees will be granted timely access to crucial campus services such as wireless network, door access, email, library, Banner, etc.
- Information pulled from RIMS will provide up-to-date information for the Rowan online directory.

Information that will be collected and entered by supervisors:

**Organization** - This is the department or division name. Only create the one that your level is responsible for. Do not create any sub-levels. They will be created by the managers you supervise.

**Job Title** - Use descriptive job titles like “trainer” (instead of Professional Service Specialist). If you have 3 trainers, then you only have to create this Job Title one time. Many Job Titles are prepopulated in RIMS.

**Position** - A Position must be created for each person that occupies a Job Title. For instance, if you have three technical trainers, then three positions must be created.

**Role** - Each Position will have a Role. Choose from such roles as Administrator, Staff, Managerial or Secretarial.

**User** - A User is a person. One person will occupy each Position.

**Proxy** - A supervisor may assign a proxy to act on their behalf in the RIMS application.

Preparation

Before entering data, gather information about the positions in the organization that you directly supervise using the worksheet in Appendix A.

You will need the following information:

- The name of your **Organization**
- The **Structure** of your Organization (Functional or Structural)
  - **Structural** - An organization that shows up as it’s own group on organizational charts (example - Human Resources)
  - **Functional** - An organization that would not show up on and organizational chart, it is simply an Internal structure (example - members working on a special project)
- For each person (**User**) in your Organization: Banner ID, Employee Name, Job Title (for example Technical Trainer), Role (for example Staff)
RIMS Overview

Organizational data is provided from the top down. For example, the top person in a division (Level 1) will insert data about their direct reports only (Level 2). Then Level 2 will insert data about their direct reports (Level 3).

As each level inserts data, it must be approved by the person one level above them (their direct supervisor). So when Level 2 inserts data, it must be approved by Level 1. When Level 3 adds data, it must be approved by Level 2.
**RIMS Overview**

Below is an example of how the data would be entered for this organization.

**Level 2**

**Director**  
Submits a request to create the **Organization**.  
Waits for approval from the Vice President.

**Vice President**  
Approves the **Organization**.

**Director**  
Submits request to create a **Job Title**.  
Waits for approval from the Vice President.

**Vice President**  
Approves the **Job Title**.

**Director**  
Submits request to create a **Position**.  
Waits for approval from the Vice President.

**Vice President**  
Approves the **Position**.

**Director**  
Submits one **User** (person’s name) for each **Position**.

**Vice President**  
Approves each **User**.

**Level 3**

**Assistant Director**  
Submits a request to create an **Organization**.  
She waits for approval from the Director.

**Director**  
Approves the **Organization**.

**Assistant Director**  
Submits a request to create a **Job Title**.  
Waits for approval from the Director.

**Director**  
Approves the **Job Title**.

And it continues with adding **Positions** and **Users**.
RIMS Workflow

RIMS – Rowan Identity Management System

1. Does the Organization Exist?
   - No: Request the Organization and Wait for Approval
   - Yes: Proceed to the next step

2. Does the Job Title Exist in the Organization?
   - No: Request the Title and Wait for Approval
   - Yes: Proceed to the next step

3. Does the Position Exist in the Organization?
   - No: Request the Position and Wait for Approval
   - Yes: Proceed to the next step

Assign a Person to the Position with the Organization and Title
Log on to RIMS

RIMS runs on the following versions of browsers supported by IRT: Internet Explorer 9+, Chrome 36+, and Safari 6+. (Versions supported are subject to change going forward.) If problems are encountered accessing the system using one of these supported browsers, please contact support@rowan.edu.

Enter rims.rowan.edu into your browser location bar

- If your direct supervisor has entered data about you, you will have an active position. If you do not have an active position, contact your supervisor.
- If you do not have a position yet, you will still be able to access the Help and User menus.

If you have more than one position (for example you are a supervisor of one department and also an adjunct professor), then choose the position you will be acting in for this session.

1. Choose your Active Position
2. Submit

You will not have an active position until your position has been created by your supervisor.
On the **welcome page** you will see information about how the data will be used and icon shortcuts to the top menu items.

**Requests** - Submit, approve, deny, or review different types of requests as your currently active position.

**Identity Info** - Review user, position, organization, and proxy information for the currently active position and create an org chart.

**User** - Check or change your currently active position.

**Help** - Find link to frequently asked questions, manual or contact information.

---

**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.
Using the RIMS Workflow chart, ask yourself the following: **Have the Organization, Job Title or Position already been created?**
To find out if this information, select **Identity Info**.

Your organizations that already exist will be listed under your current position. You will also see all the **Job titles, Positions** and **Users** for those organizations. If any Organizations, Job Titles, Positions or Users (that you **directly** supervise) are missing from this page, then you will have to create them in RIMS.
Create Organization

Create the organization for which you are immediately responsible only. **Do not** create organizations under your subordinate supervisors. They will create their own Organizations.

From the **Requests** menu:
1. **Select Submit Request**
2. **Select Create Organization.**
3. In the **Title** field, type the name of your organization.
4. **Complete the Short Name and Description fields** (both fields are optional).
5. **Select the organization type** (Structural or Functional). This is determined by the supervisor. **Structural** - An organization that shows up as its own group on Organizational charts (example - Human Resources). **Functional** - An organization that would not show up on an organizational chart, simply for internal structure (example - a special project where the members may need a particular access).
6. You will see in Parent Organization the larger organization where your department resides. **Responsible Position** is the person who is making the request.
7. **Select Submit.**
8. Your direct supervisor will receive a pending request notice to approve or deny for each request. You will see a red number indicating pending request(s) on your screen.
9. You can proceed to the next step (create Job Title) after the request to create an organization is approved.
10. **Select the RIMS logo to refresh the page, and if a pending request was approved (or denied), the red number will disappear from Requests.**
11. Under Requests, check Active Positions; Pending, Approved, Denied or Revoked requests to check the status of your requests.
Confirm or Create Job Title

Many Job Titles are prepopulated in the RIMS application. After you have created an Organization, check if a Job Title already exists.

From the Requests menu:
1. Select Submit Request.
2. Select Create Position.
3. Select Organization.
4. Select Job Title.
5. If the Job Title does not exist, create a Job Title (see below). If the Job Title does exist, create a Position (next page).

Create a Job Title

From the Requests menu:
1. Select Submit Request.
2. Select Create Job Title.
3. In the Title field, type the name of the Job Title you wish to create in the organization.
4. Choose the Organization where the Job Title resides.
5. Select Submit.
6. Wait until your supervisor approves the request then move on to create the position.

If you have more than one person with the same Job Title (example: Analyst), only create that Job Title one time. Later, you will create Positions for each individual person who holds that Job Title.

Do not create Job Titles for those that are more than one level below you.
Do not create Job Titles for those that report to someone that you supervise.

Your direct supervisor will receive a pending request notice to approve or deny for each request. You can proceed to the next step (create Position) after your requests have been approved.
Create Position

From the **Requests** menu:

1. Select Submit Request.
2. Select Create Position.
3. Select the Organization where your Position resides.
4. Select the Job Title for that position. If you had created a new job title it will be at the top of the list. The rest of the list is in alphabetical order.
5. Choose a Role that most closely describes the position. For example, if the Job Title is Analyst, the Role will be Staff. Role Description will appear in the dropdown menu and at the bottom of the form.
6. Quantity - Select the number of people who occupy that position.
7. Submit.
8. Repeat for any other positions you need to create.

9. Your direct supervisor will receive a pending request notice to approve or deny for each request.
10. You can proceed to the next step (Assign User to Position) after they approve your requests to create Positions.
Assign User to Position

From the **Requests** menu:
1. Select Submit Request
2. Select Assign User to Position

**Find user by:**
1. Select Last Name, Email, or Banner ID (for faster results use Email or Banner ID)
2. Enter the user's last name, email, or Banner ID.
3. From the Results list, select the user. The Selected User will then be populated.
4. Select an empty position from the drop down list.
5. Submit.
6. Repeat for each User request.

If a User occupies more than one position, the supervisors of their other position will enter them in their organization.

Your direct supervisor will receive a pending request notice to approve or deny for each user assignment request.
Once the user has been assigned to a position, and approved by the supervisor, then Human Resources will review the job title and role of all employees and will either approve or deny the request. If the request is denied, an email with an explanation will be sent to the supervisor and the supervisors proxy, if applicable.

The supervisor will see that there is an active pending request. Click on the request to see the pending request.

The supervisor could decide to Revoke the pending document by selecting Revoke in the request (in the Active Positions’ Pending Requests). The request will then be removed from Human Resource’s Approval queue and the title will remain Pending.

The title will show as “Pending” on the org chart until Human Resources approves it.

Once the Job Title is approved or denied by Human Resources, the supervisor and proxy will receive an email. If it is denied, then comments will be added to explain the denial.
Approve or Deny Requests

The number of outstanding requests for you will be displayed in red next to the word Requests.

From the Request menu:

1. Select the drop down arrow next to Requests and the number of outstanding requests will be displayed in red in each category.
2. You can select the outstanding requests to review, approve or deny, depending on your role in the organization.
3. Requests, approvals and denials will be sent to approvers and requestors in a weekly email digest. See Email Notifications.

To approve or deny requests, from the Requests menu:

1. Select Approve or Deny Pending Requests.
2. Review the requests.
3. Add Comments (optional).
4. Select Approve or Deny.
5. Submit.
6. If there are multiple approvals, then you can select the Approve or Deny radio button next to each request and then select Submit.
Review Requests

From the Requests menu:
1. Select Requests Active Position has Approved.
2. Review the requests.

From the Requests menu:
1. Select Active Position’s Approved Requests.
2. Review the requests.
Assign a Proxy

You can assign a proxy to approve requests from people you supervise and to create the organizations, job titles and positions that you directly supervise.

From the **Requests** menu:
1. Select Submit Request.

**To assign a proxy:**
3. Search for a User by last name, email, or Banner ID.
4. Select the desired User.

The **Primary Supervisor Position** will be the person putting in the request.
5. Ensure that your selected **User** is correct.
6. Submit.

Your direct supervisor will receive a pending request notice to approve or deny for each user proxy request.
Remove and Update

From the **Requests** menu:
1. Select Submit Request.
2. Use options under Remove and Update to make changes to your data.
3. Submit.
Identity Info Menu

Select the dropdown arrow next to Identity Info.

User Info
This data is currently pulled from information that you have entered in Self Service Banner. If the information is incorrect, correct it in Self Service Banner.

Position Information
This includes current position, primary supervisor, and responsible organizations (if any).

Organizational Information
This will display your current organization, your parent organization, your supervisor (Responsible Position), all the positions in the organization to which you belong, and the organizations directly under your supervision. If you select any of the users, you will see their Position information.
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. If you created multiple organizations, only one organization will show in the organization chart, and everyone who reports to you will show in that organization.

To view the organization of the level above you, select your supervisor’s block and reload the chart again.

Select “Save Chart” to download the organization chart as a .png image.
User Menu

You can check or change your currently active position in the User menu.

From the User Menu:

1. Select the drop down arrow.
2. If you are not acting as a proxy for another person, it will show the active position as your position.
3. If you have been assigned as a proxy for another person, and you wish to switch to that role, choose Set Active Position.
4. You will be returned to the first page where you will choose the proxy position you wish to assume.

Acting as a Proxy

1. If you are in a proxy position, next to the word User at the top of the page, you will see Proxy highlighted in red.
2. Choose the drop down arrow and you will see that you are logged on as yourself, but your Active position is in the proxy role, and it will name the person for whom you are the proxy.
Help Menu

Select the **Help menu** to get the link for FAQ’s, manual, videos, training and support.

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**RIMS Resources**

- **Online Help**
  Please see the HR RIMS website [HERE](#) where you will find the FAQ’s, a training manual and a link to the training videos.

- **Training**
  To set up in-person training for you or your staff, please contact IRT Training Services at [irt.training@rowan.edu](mailto:irt.training@rowan.edu).

- **Additional Support**
  For technical support contact [support@rowan.edu](mailto:support@rowan.edu).
Email Notifications

Email notifications will be automatically generated for all who have and actionable RIMS item request relevant to their positions. The information in the email only includes activities since the last email.

They include:

1. A daily digest of ALL actionable items that are relevant to ALL positions you occupy or for which you are a proxy.
2. Email notification upon assignment to a position.
3. Email notification upon assignment as a proxy for a position.

Note: if there are no actionable items for any of your occupied positions, or for a position for which you are a proxy, you will not receive an email.

Sample emails

Supervisors who have not made updates to their RIMS organization in 60 day will be sent a reminder to review it and may need any necessary changes.
Appendix A - Worksheet

Please have the information below available before entering the data into RIMS

Your Name

Your Proxy optional)

Your Supervisor

Name of Organization that you supervise
(Department, Division or Group)

List the managers and/or staff that report directly to you only (not staff who report to your managers)

<table>
<thead>
<tr>
<th>Banner ID or Email address</th>
<th>Employee Name</th>
<th>Job Title</th>
<th>Role (Ex, Staff, Faculty, Manager etc.)</th>
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The Human Resources RIMS web page is located at http://www.rowan.edu/hr/rims/
There you can find a list of Job Titles, link to log on to RIMS, RIMS manual, links to the
training video, policies and frequently asked questions.

For support contact support@rowan.edu

For feedback on RIMS, please complete this short survey:

https://tinyurl.com/ybarvsaq