The Privileged Appliance and Modules (TPAM) 2.5.919

Reviewer Guide

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Refer to our Web site (http://www.OneIdentity.com) for regional and international office information.

Patents

Trademarks

Legend

WARNING: A WARNING icon indicates a potential for property damage, personal injury, or death.

CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT, NOTE, TIP, MOBILE, or VIDEO: An information icon indicates supporting information.

TPAM Reviewer Guide
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Permission Based Home Page

Introduction

This document has been prepared to assist you in becoming familiar with The Privileged Appliance and Modules (TPAM). It is intended for reviewers of password releases and sessions.

Your home page is based on the user type and permissions assigned to your user ID in the TPAM application. You can return to the home page from anywhere in the TPAM application by clicking the **home icon** located on the far left side of the menu ribbon.

Message of the Day Tab

The first tab that displays is the default message of the day, which is configured through the admin interface.

Recent Activity Tab

The recent activity tab shows all your activity in TPAM for the last 7 days.

Pending reviews tab

If you are an eligible reviewer for any password releases or sessions you see the Pending Reviews tab on the home page. Any password releases or sessions that are pending review are seen on this tab. By clicking on the request id you are taken directly to the Password Release Review Details or Session Review Details tab. As an auditor you can always enter review comments. To use the auto-refresh option select the box and type the number of minutes you would like the window refreshed.

Manage Your TPAM User ID

Any user may change their password and update individual account details using the User menu option.

To reset your password:

1. From the User Menu select **Change Password**.
2. Enter the Old Password, the New Password, and Confirm New Password.
3. Click the **Save Changes** button.

NOTE: User passwords are subject to the requirements of the Default Password Rule.

To edit your user details:

1. From the User menu select **User Details**.
2. Make changes in the following fields:

Table 1: Fields available on My User Details

Field name	Description
Phone Number	Phone number that is associated with your user id in TPAM.
Mobile Number	Mobile number that is associated with your user id in TPAM.
E-mail	The email address that TPAM will use for email notifications from TPAM.
My Timezone	The appropriate time zone must be chosen from the list. With this option most dates and times that the user sees in the application or on reports are converted to their local time. If a date or time still reflects server time it is noted on the window.
Description	The description box may be used to provide additional details about the user.
CLI Key Passphrase	Only applies to CLI users. This is an optional pass phrase to encrypt the user’s private key. The phrase is case sensitive, up to 128 characters, and does not allow double quotes (“). The phrase is not stored and cannot be retrieved after the key is generated.
Reset CLI Key	Click this button to create a new CLI key for the user ID.

Field name	Description
Get CLI Key	Click the button to retrieve the new CLI key.
Get API Key	Click this button to create a new API key for the user ID.
Get API Key	Click the button to retrieve the new API key.

NOTE: If the System-Administrator disables User Time zone changes in the /admin interface the User Time Zone Information block shown above is visible only for Administrator users.

3. Click the **Save Changes** button.

Review a Password Release

Introduction

Accounts can be configured to have review requirements for password releases once the release duration has expired. Users eligible to review password releases receive email notification to alert them of pending reviews.

Review status definitions

The table below explains the different possible password release review statuses.

Table 2: Password release review statuses

Status	Definition
Pending	An authorized reviewer is still required to complete the review process.
Completed	All the required reviewers have clicked the **Complete My Review** button.
Overdue	A reviewer has not reviewed the password release within the required time period.

On the Password Release for Review listing tab there is a column labeled **Review Started**. if the value is**Y,** at least one review comment has been submitted. If the value is **N**, no review comments have been submitted. If the value is **-**(dash) then the review is complete.

Review a password release

To review a password release:

1. Select **Review | Password Releases** from the main menu.
2. To review a password release for a specific account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the Request ID to review.
5. Click the **Reviewers** tab to see the list of eligible reviewers. (optional) These are the review requirements at the time the password request was submitted.
6. Click the **Reviews** tab to see any review comments made.
7. Click the **Releases** tab to see if past passwords were accessed.
8. Click the **Responses** tab to see comments that were made when approving this request and comments made by the requestor if they expired the request early.
9. Click the **Details** tab. The times displayed on this tab are displayed to the reviewer in their local time, as configured for their user ID in TPAM.
10. If the password release being reviewed was part of a multi-request, select the **Apply Review** check box for the appropriate row.
11. To enter a comment before officially marking the release as reviewed enter a comment in the Review Comment box and click the **Save My Review Comment** button. (optional)

    Every time a comment is submitted the Reviews Submitted count increases.
12. To mark the review as complete, enter a review comment and click the **Complete My Review** button.

Provisional ticket validation on a password release

If the required ticket system for this account has "provisional validation" enabled in the admin interface and the ticket system was not available for validation at the time the requestor submitted the request, you see the following message note on the review details tab:

"The ticket number listed above was provisionally validated because the Ticket System was disabled at the time of the request."

A reviewer does not have the ability to retroactively check for ticket validation.

Review a Session

Introduction

Accounts can be configured to have review requirements for PSM Sessions once the sessions are expired. Users eligible to review sessions receive email notification to alert them of pending reviews.

Review status definitions

The table below explains the different possible session review statuses.

Table 3: Session review statuses

Status	Definition
Pending Review	An authorized reviewer is still required to complete the review process.
Completed	All the required reviewers have clicked the **Complete My Review** button.
Overdue	A reviewer has not reviewed the session within the required time period.

On the PSM Sessions for Review listing tab there is a column labeled **Review Started**. if the value is **Y,** at least one review comment has been submitted. If the value is **N**, no review comments have been submitted.If the value is **-**(dash) then the review is complete.

Review a session

To review a session:

1. Select **Review | PSM Session** from the main menu.
2. To review a session for a specific account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the session to review.
5. Click the **Session Logs** tab.
6. Select a session log to replay.
7. Click the **Replay Session** button. For details on replaying sessions see Session Playback Controls.

   NOTE: A session review cannot be completed until one of the session logs has been replayed by the reviewer. TPAM may be configured so that all session logs must be replayed before the review can be completed.
8. Watch the session and then close the session window.
9. To enter or view any comments about a session log, select a session log on the session logs tab and click the **Comments** tab. Enter a comment in the new comment box and click the **Save New Comment**t button to add a comment. (optional)

   These comments do not flag a session as being reviewed, but may be informative to other reviewers.
10. To view information about a file transfer, select a session log on the Session Logs tab and click the **File Transfers** tab. (optional)
11. Click the **Reviewers** tab to see the list of eligible reviewers. (optional) These are the review requirements at the time the session request was submitted.
12. Click the **Reviews** tab to see any review comments made.
13. Click the **Responses** tab to see comments that were made when approving this request and comments made by the requestor if they expired the request early.
14. Click the **Details** tab. The times displayed on this tab are displayed to the reviewer in their local time, as configured for their user ID in TPAM.
15. If the session being reviewed was part of a multi-session request, select the **Apply Review** check box for the appropriate row.
16. To enter a comment before officially marking the session as reviewed enter a comment in the Review Comment box and click the **Save My Review Comment** button. (optional)

    Every time a comment is submitted the Reviews Submitted count increases.
17. To mark the review as complete, enter a review comment and click the **Complete My Review** button.

Provisional ticket validation on a session

If the required Ticket System for this account has “provisional validation enabled” in the admin interface, and the Ticket System was not available for validation at the time the requestor submitted the request, you see the following note on the Review Details tab: “The ticket number listed above was provisionally validated because the ticket system was disabled at the time of the request.”

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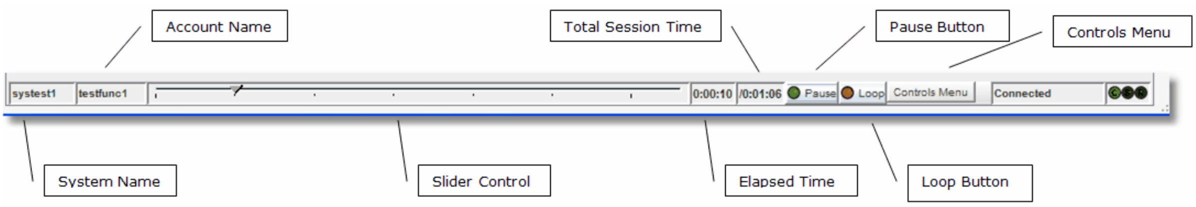
Session Management

Introduction

The session management menu provides access to session logs and the ability to playback sessions.

Session Playback Controls

To manipulate the playback of a session, the controls at the bottom of the session replay window lets the speed of the playback be changed, ranging from ½ normal speed to 16 times normal speed. Replay may be paused at any point.



The table below defines the functions and display information on the playback tool bar.

Table 4: Playback tool bar options

Option	Description
System Name	The name of the remote system where the session was established.
Account Name	The name of the remote account used to access the system during the session.
Slider Control	Displays the current position of playback, and after the session is paused lets a new position be selected. To reposition session replay, pause the session and position

Option	Description
	the slider control to the desired spot. Resume playback using the pause control. The session playback moves at maximum speed to the desired playback position. NOTE: The session time position is based on network packet timestamps. This means that the playback control slider may appear to move in an uneven fashion depending on the 'data density' of each packet, especially for very short recorded sessions. If for some period time there is a minimal amount of activity followed by a flurry of dialog openings and keystroke input, this would cause the uneven control slider movement. Longer session files tend to provide a smoother control slider movement.
Elapsed Time	Time elapsed in the session replay.
Total Session Time	Total length of time of the session.
Pause Button	When green the session is playing. When red the session is paused. To pause or resume playback simply click the control.
Loop Button	Selecting this button sets the session to replay over and over.
Controls Menu/Select Speed	Session play speed in relation to normal speed. For example .5x will play the session at half normal speed.
Controls Menu/Metadata/Open Dialog	If selected this opens a window to display the keystroke log, and tags for events and bookmarks. The keystroke slider at the top of the window can be adjusted so that they can see the keystrokes taking place in this window before or after they occur in the actual session replay window.
Controls Menu/Add Bookmark	If selected allows the user to add a bookmark at a specific point in the session.
Controls Menu/Always on Top	If selected, the meta data dialog window will be displayed in front of the session replay window.

Meta Data Window

While replaying the session the meta data window can be displayed in another window to view the keystroke/event log.

To open the meta data window during a session:

1. Click the **Replay Session** button.
2. Once the session has a status of connected in the replay window, select **Controls Menu | MetaData | Open Dialog**.

Keystrokes/events will be displayed in green as they occur during the session replay. Bookmarks are displayed in red. Slide the keystroke slider to the left to view the keystroke log in advance of the activity occurring in the session replay window. If the Clear on Loop check box is selected the keystroke log will be cleared before the session is replayed each time.

Replay a Session Log

NOTE:You cannot view the keystroke log when replaying a session unless the access policy that is granting you permission to replay the session has **Allow KSL View** selected.

To replay a session log:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter your search criteria on the filter tab.
3. Click the **Listing** tab.
4. Select the session log to replay.
5. Click the **Replay Session** button.
6. Click the **File Transfer** tab to view details on any files transferred during the session.
7. Click the **Captured Events / Bookmarks** tab to view details on events captured during the session.

NOTE: If the session log is stored on an archive server there may be a delay while TPAM retrieves the log from its remote storage location.

The remote access session is displayed and played back in real time. The playback session may be paused and resumed, moved ahead or back at increased speed, or continuously played at various speeds.

Add a Bookmark to a Session

Requestors, approvers, reviewers and auditors have the ability to add bookmarks to a session log. Adding a bookmark can point something out to another person replaying the session without them having to replay and watch the entire session.

To add a bookmark:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter your search criteria on the filter tab.
3. Click the **Listing** tab.
4. Select the session log to replay.
5. Click the **Replay Session** button.
6. When you get to the point in the session where you want to add a bookmark click the **Pause** button on the session playback controls at the bottom of the window.
7. Select **Controls Menu | Metadata | Add Bookmark**.
8. Enter text to label the bookmark and click the **OK** button.
9. After the bookmark is added the session will resume playback.

View Bookmarks/Captured Events

To view bookmarks and captured events from the session logs listing page:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter your search criteria on the filter tab.
3. Click the **Listing** tab.
4. Select the session log.
5. Click the **Captured Events, Bookmarks** tab. Events are only captured for sessions on an account if the **Capture Events?** check box is selected for the account on the PSM details tab.

Jump to a Bookmark

To jump to a bookmark while replaying a session:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter your search criteria on the filter tab.
3. Click the **Listing** tab.
4. Select the session log to replay.
5. Click the **Replay Session** button.
6. On the session playback menu select **Controls Menu | Metadata | Open Dialog**.
7. Click the **Select Bookmark** tab.
8. Select the bookmark you want to go to.

9. Click the **Jump to Bookmark** button.
10. The session replay will go to the bookmark but will continue replay, it will not be paused at the bookmark.

Jump to an Event

To jump to an event while replaying a session:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter your search criteria on the filter tab.
3. Click the **Listing** tab.
4. Select the session log to replay.
5. Click the **Replay Session** button.
6. On the session playback menu select **Controls Menu | Metadata | Open Dialog**.
7. Click the **Select Event** tab.
8. Select the event you want to go to.
9. Click the **Jump to Event** button.
10. The session replay will go to the event but will continue replay, it will not be paused at the event.

Monitor a Live Session

With the appropriate permissions a user can monitor another user's session. The user running the session has no indication that their session is being watched.

NOTE: You cannot view the Keystroke Log when monitoring a session.

To monitor a live session:

1. Select **Session Mgmt | Session Logs** from the main menu.
2. Enter search filter criteria.
3. Click the **Listing** tab.
4. Select the session to monitor. Live sessions will have a status of Connected.
5. Click the **Monitor Session**button. The PSM Session Monitor window will open with a view of the live session.

On Demand Reports

Introduction

TPAM has a number of pre-defined reports to aid in system administration, track changes to objects, and provide a thorough audit trail for managed systems. All reports are accessed via the Reports menu. The reports can be filtered by criteria that are specific to each report type.

Report Time Zone Options

Time zone filter parameters are included on most of the reports allowing you to view the report data in your local or server time zone (UTC). These filter parameters only appear if you are configured with a local time zone. These parameters affect not only the data reported but also the filter dates used to retrieve the data.

NOTE: Access to different reports is based on the user's permissions. Only TPAM Administrators and Auditors have access to all reports.

For example, the server is at UTC time and the user is in Athens, Greece (UTC +2). When the user enters a date range of 9/16/2009-9/17/2009 with the local time zone option, the report retrieves transactions that happened on the server between 9/15/2009 22:00 through 9/17/2009 21:59.

All reports that use the local time zone filter have an extra column indicating the UTC offset that was used to generate the report. This value is either the current UTC offset of the user. This column will also display in reports that are exported using Excel or CSV.

Run a Report

The following procedure describes the steps to run a report in TPAM.

To run a report:

1. From the Reports menu select the report.
2. On the Report Filter tab enter the filter criteria.
3. Click the **Report Layout** tab. (Optional)
4. Select the appropriate boxes in the Column Visible column to specify the columns to be displayed on the report.
5. Select the appropriate box in the Sort Column column to specify sort order.
6. Select the Sort Direction.
7. If viewing the report in the TPAM interface, select the Max Rows to display.

   IMPORTANT: The Max Rows to Display limits the number of rows that are returned even if the number of rows that meet the filter criteria is greater than what is selected.

8. To view the report results in TPAM click the **Report** tab. To adjust the column size of any column on a report hover the mouse over the column edge while holding down the left mouse button and dragging the mouse to adjust the width.
9. To view the report results in an Excel or CSV file click the **Export to Excel** or **Export to CSV** button.

   IMPORTANT: If you expect the report results to be over 64,000 rows you must use the CSV export option. The **Export to Excel** option only exports a maximum of 64,000 rows.

10. Open or Save the report file.

Report descriptions

The following table lists the on demand reports available in TPAM.

Table 5: TPAM report descriptions

Report title	Description
Activity Report	Detailed history of all changes made to TPAM.
PSM Accounts Inventory (PSM Customers only)	Accounts that are PSM enabled.
Password Aging Inventory	Managed systems, and the managed accounts that reside on those systems.
File Aging Inventory	Secure stored files and the systems that manage them.

Report title	Description
Release-Reset Reconcile	Audit evidence that released passwords have been reset appropriately.
User Entitlement	Data to review and audit users’ permissions for systems, accounts, files and commands on an enterprise scale. NOTE: It is recommended that **Show Only Effective Permissions** is selected to reduce the size of the report. NOTE: If any of the **Expand ...** options are selected, at least one of the text filters must be filled in with a non-wildcard value. For very large data sources the expansion of Collections, Groups, and/or Access Policies can very easily create a report beyond the retrieval and display capabilities of a web browser. For large data sets (10’s of thousands of accounts or thousands of large collections to expand) it is recommended to rely on the Data Extracts for unfiltered versions of the Entitlement Report.
Password Update Activity	Password modifications to systems managed by Privileged Password Manager.
Password Update Schedule	Scheduled password changes and the reason for the change.
Password Testing Activity	The results of automated testing of each managed accounts’ password.
Password Test Queue	Accounts currently queued for password tests. NOTE: This is a useful report to view when troubleshooting performance related issues. A high number of queued password tests can impact system response time if the check agent is running. This report does not provide a mechanism for exporting data but does provide for deleting passwords from the test queue. So if there is some known reason why a large group of password tests are failing, such as a network outage, that group can be filtered out in the report and then deleted. An alternative would be to just stop the check agent.
Expired Passwords	Currently expired passwords, or passwords that will expire within a date range.
Passwords Currently in Use	Defines “in-use” passwords as: • Passwords that have been retrieved by the ISA/CLI/API that have not yet been reset. • Passwords that have been requested and retrieved, but have not yet been reset.

Report title	Description
	• Password has been manually reset on the Account Details or Password Management pages, but has not yet been reset by PPM. • Password has been manually entered on the Account Details page, but has not yet been reset by PPM. • Account is created on the TPAM interface or as a result of Batch Import Accounts and is assigned a password by the user (as opposed to letting the system generate a random password).
Password Requests	Password requests and the details relating to the request. Selecting a row in the report, and clicking on the **Responses**, **Reviews** and **Releases** tab gives you additional details on the request.
Password Consecutive Failures	Password check and change failures for accounts.
Auto-Approved Password Releases	Password releases that did not require dual control approval.
Auto-Approved File Releases	File releases that did not require dual control approval.
Password Release Activity	Details on password releases, such as request reason, retrieval date and ticket information.
File Release Activity	Details on file releases, such as request reason, retrieval date and ticket information.
Windows Domain Account Dependencies	Managed domain accounts that have dependencies on other systems.
Auto Approved Sessions (PSM customers only)	Sessions that were approved, as a result of no approval requirements for sessions on the account.
PSM Session Activity (PSM customers only)	Session details, such as start date, end date, and request reason.
PSM Session Requests (PSM customer only)	Session requests and the details relating to the request. Selecting a row in the report, and clicking on the **Responses**, **Reviews** and **Releases** tab gives you additional details on the request.

About us

Contacting us

For sales or other inquiries, visit https://www.oneidentity.com/company/contact-us.aspx or call +1-800-306-9329.

Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at https://support.oneidentity.com/.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product