



The Privileged Appliance and Modules
2.5.920

Approver Guide

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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.

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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 approvers of password, file and session requests.

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. To immediately approve any pending requests click the links.

Recent Activity Tab

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

Approvals Tab

The Approvals tab displays any requests (Password, File or Session) that require approval. After they are approved or denied you can still see the request on this list until the release duration expires. By clicking on the request id you are taken directly to the appropriate Requests Approval Detail tab so that you can approve or deny the request. To use the auto-refresh option select the box and type the number of minutes you would like the window refreshed.

Extension approvals tab

The extensions approvals tab displays any extension requests (Password, File or Session) that require approval. After they are approved or denied the request can be seen on this list until the release duration expires. Clicking on the extension ID opens the appropriate Request Extensions Approval Details tab to approve or deny the request. 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.

Field name	Description
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.
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.

Approve/Deny Password Request

Introduction

When a password request is submitted, the associated approver(s) is notified via email of the pending request. The approver logs on to TPAM to approve/deny the request.

Approve/Deny Password Request

The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a password request:

1. Select **Approve/Review | Password Request** from the main menu.
2. To approve/deny a request on a specific system/account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. If the request selected is part of a multiple request submission then you also see all the other pending requests that are eligible for your approval.
7. Select the Req. IDs to approve/deny.
8. Click the **Conflicts** tab to see if any other pending requests for this password overlap with the same release duration.
9. Click the **Approvers** tab to see the list of other eligible approvers for this request.
10. Click the **Responses** tab to see the responses other eligible approvers have made for this request.
11. Enter comments in the Request Response box.
12. Click the **Approve Request** or **Deny Request** button.

Revalidate Ticket on a Request

If the required Ticket System for this account has “provisional validation enabled” in the admin interface, and the Ticket System is not available for validation at the time the requestor submits the request, you see the following note on the Request Details tab:

The request can be approved/denied without revalidating the ticket.

To revalidate the ticket:

1. Click the **Revalidate Ticket** button. The following pop up appears:
2. Click the **OK** or **Cancel** button. If TPAM determines that the ticket system is still disabled the status of the request will remain unchanged.

Deny Request After it is Approved

Any eligible approver can deny a password request after it has already been approved or auto-approved. Once denied, the requestor will no longer have access to the password. The requestor receives an email notifying them that the request was denied

To deny the request:

1. Select **Approve/Review | Password Request** from the main menu.
2. Enter the search criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to deny.
5. Click the **Details** tab.
6. Select the Req. IDs to deny.
7. Enter a reason in the Request Response box.
8. Click the **Deny Request** button.

Approve/deny request extension

Requestors can submit an extension for a password, file or session request so that they can have more time. The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a request extension:

1. Select **Approve/Review | Request Extension** from the main menu.
2. To approve/deny a request on a specific system/account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. Click the **Conflicts** tab to see if any other pending requests for this password overlap with the same release duration.
7. Click the **Approvers** tab to see the list of other eligible approvers for this request.
8. Click the **Extension Responses** tab to see the responses other eligible approvers have made for this request.
9. Enter comments in the Extension Response box.
10. Click the **Approve Extension** or **Deny Extension** button.

Approve/Deny File Request

Introduction

When a file request is submitted, the associated approver(s) is notified via email of the pending request. The approver logs on to TPAM to approve/deny the request.

Approve/Deny File Request

The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a file request:

1. Select **Approve/Review | File Request** from the main menu.
2. To approve/deny a request on a specific system enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. Click the **Conflicts** tab to see if any other pending requests for this file overlap with the same release duration.
7. Click the **Approvers** tab to see the list of other eligible approvers for this request.
8. Click the **Responses** tab to see the responses other eligible approvers have made for this request.
9. Enter comments in the Request Response box.
10. Click the **Approve Request** or **Deny Request** button.

Revalidate Ticket on a Request

If the required Ticket System for this file has “provisional validation enabled” in the admin interface, and the Ticket System is not available for validation at the time the requestor submits the request, you see the following note on the Approval Details tab:

The request can be approved/denied without revalidating the ticket.

To revalidate the ticket:

1. Click the **Revalidate Ticket** button. The following pop up appears:
2. Click the **OK** or **Cancel** button. If TPAM determines that the ticket system is still disabled the status of the request will remain unchanged.

Deny Request After it is Approved

Any eligible approver can deny a file request after it has already been approved or auto-approved. Once denied, the requestor will no longer have access to the file. The requestor receives an email notifying them that the request was denied

To deny the request:

1. Select **Approve/Review | File Request** from the main menu.
2. Enter the search criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to deny.
5. Click the **Details** tab.
6. Select the Req. IDs to deny.
7. Enter a reason in the Request Response box.
8. Click the **Deny Request** button.

Approve/deny request extension

Requestors can submit an extension for a password, file or session request so that they can have more time. The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a request extension:

1. Select **Approve/Review | Request Extension** from the main menu.
2. To approve/deny a request on a specific system/account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. Click the **Conflicts** tab to see if any other pending requests for this password overlap with the same release duration.
7. Click the **Approvers** tab to see the list of other eligible approvers for this request.
8. Click the **Extension Responses** tab to see the responses other eligible approvers have made for this request.
9. Enter comments in the Extension Response box.
10. Click the **Approve Extension** or **Deny Extension** button.

Approve/Deny Session Request

Introduction

When a session request is submitted, the associated approver(s) is notified via email of the pending request. The approver logs on to TPAM to approve/deny the request.

Approve/Deny Session Request

The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a session request:

1. Select **Approve/Review | Session Request** from the main menu.
2. To approve/deny a request on a specific system/account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. If the request selected is part of a multiple request submission then you also see all the other pending requests that are eligible for approval.
7. Select the Req. IDs to approve/deny.
8. Click the **Conflicts** tab to see if any other pending requests for this session overlap with the same release duration.
9. Click the **Approvers** tab to see the list of other eligible approvers for this request.
10. Click the **Responses** tab to see the responses other eligible approvers have made for this request.
11. Enter comments in the Request Response box.
12. Click the **Approve Request** or **Deny Request** button.

Revalidate Ticket on a Request

If the required Ticket System for this account has “provisional validation enabled” in the admin interface, and the Ticket System is not available for validation at the time the requestor submits the request, you see the following note on the Request Details tab:

The request can be approved/denied without revalidating the ticket.

To revalidate the ticket:

1. Click the **Revalidate Ticket** button. The following pop up appears:
2. Click the **OK** or **Cancel** button. If TPAM determines that the ticket system is still disabled the status of the request will remain unchanged.

Deny Request After it is Approved

Any eligible approver can deny a session request after it has already been approved or auto-approved. If a live session is being conducted at the time you decide to deny the request that session is automatically terminated. The requestor receives an email notifying them that the request was denied

To deny the request:

1. Select **Approve/Review | Session Request** from the main menu.
2. Enter the search criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to deny.
5. Click the **Details** tab.
6. Select the Req. IDs to deny.
7. Enter a reason in the Request Response box.
8. Click the **Deny Request** button.

Approve/deny request extension

Requestors can submit an extension for a password, file or session request so that they can have more time. The requested date/time of the request will be displayed to the approver in their local time, as configured for their user ID in TPAM.

To approve/deny a request extension:

1. Select **Approve/Review | Request Extension** from the main menu.
2. To approve/deny a request on a specific system/account enter the criteria on the Filter tab.
3. Click the **Listing** tab.
4. Select the request to approve/deny.
5. Click the **Details** tab.
6. Click the **Conflicts** tab to see if any other pending requests for this password overlap with the same release duration.
7. Click the **Approvers** tab to see the list of other eligible approvers for this request.
8. Click the **Extension Responses** tab to see the responses other eligible approvers have made for this request.
9. Enter comments in the Extension Response box.
10. Click the **Approve Extension** or **Deny Extension** button.

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 2: 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 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.

Option	Description
	<p>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.</p>
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

- ① **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.

- ① **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, and reviewers have the ability to add bookmarks to a session log. By adding a bookmark, the requestor, approver, or reviewer can point something out to

another approver or reviewer that they want them to look at 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

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.
 - 1 **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.
 - 1 **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 for approvers in TPAM.

Table 3: TPAM report descriptions

Report title	Description
Activity Report	Detailed history of activity in TPAM under your user ID.
PSM Accounts Inventory (PSM Customers only)	Accounts that are PSM enabled for which you have PSM Requestor permissions.
Password Aging Inventory	Managed systems, and the manager accounts that reside on those systems.
File Aging Inventory	Secure stored files and the systems that manage them.

Report title**Description**

Request Extensions

List details about request extensions that have been submitted.

Contacting us

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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