



Information Technology

IDMS ADMINISTRATOR HANDBOOK

This handbook describes administrator

access to the Identity Management

System provided by OSU Information

Technology

Last Updated: 1/23/2019

Access to IDMS Admin is allocated to those individuals working for Oklahoma State University and A&M Institutions that require the ability to view personal information regarding University community members. Admin rights are allocated at three levels: View Only, ITC/ITS Level, and ID Level. Access to IDMS Admin is subject to Information Technology approval, and requests must be generated via the departmental or college ITC or department head. Click the links below for information regarding what accesses are associated with each level.

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How to request O-Key Admin access – RETURN TO TOC

Requests to access IDMS Admin at any level should be submitted to Information Technology by the departmental or college ITC or the department head. Requests are subject to Information Technology approval at all levels. The following information details what information must be included with each request.

NOTE: This same process can be used to REMOVE access rights from an employee, as well. In addition, administrator access will automatically be removed when the administrator changes departments or terminates employment.

Additional information can be obtained by contacting the Information Technology Helpdesk by email at helpdesk@okstate.edu or phone at 405-744-HELP (4357) or by visiting the walk-in location at 421 Classroom Bldg.

1. Review this handbook to determine the appropriate admin level based on the employee's need.
2. Contact the Information Technology Helpdesk should you need to confirm the identity of your departmental or college ITC.
3. The departmental or college ITC should send an email to the OSU-Stillwater Information Technology Helpdesk at helpdesk@okstate.edu. A sample request is provided.
 - a. First and Last Name of the person to whom the rights will be allocated
 - b. IDMS Username of the person to whom the rights will be allocated
 - c. The requested level of admin rights
 - d. A brief explanation as to why this person requires access at

that level Example Request:

Subject: O-Key Admin Request –

P. Pete Body of Message:

Please grant Pistol Pete (O-Key Username = pistolp) the ITC/ITS level of O-Key Admin access, as per the ITC for OSU-Tulsa. He is a student employee in our office and requires the ability to confirm customer information and assist with technical support issues. Please contact the OSU-Tulsa ITC if you have any questions by calling <ITC First and Last Name> at <ITC Phone Number or Email Address>. Thanks!

4. By submitting your request to the IT Helpdesk, a c.Support Incident Ticket will be generated and routed to the appropriate IT personnel.
5. The request will be reviewed, and if approved, access rights granted. If questions arise regarding the request, the requestor (ITC) will be contacted.
6. Once the access rights are granted, the ITC will be able to obtain this document at it.okstate.edu.

Access Level Reference Chart – RETURN TO TOC

Admin Lookup

	User FE	View Only	ITC/ITS	ID Admin
Meta Lookup		X	X	X
Rollback (Software Svc Only)				
Delete Accounts (Soft. Only)				
External Banner PIN ³		X	X	X
Move Home Drives				X
Role Information		X	X	X
Global Group Information		X	X	X
Email Distribution List Information		X	X	X
Global Group Request		X	X	X
Global Group Admin ¹	X	X	X	X
Email Distribution Admin ¹	X	X	X	X
Request Service Account		X	X	X
Service Accounts by Department		X	X	X
Short Term Guest / Wired Exception ²	X	X	X	X

¹ The View Only or ITC/ITS admin must be an owner of the group

² The admin must be in the STW_Short_Term_Guest_Access global group or the STW_Wired_Exceptions global group to create the accounts

³ The admin must be in a designated Registrar / HR / AR global group

Meta Reports

	User FE	View Only	ITC/ITS	ID Admin
Systems Migration			X	X
Activation List			X	X
Data Migration			X	X
Exchange Report			X	X
Rollback Report				X
Name Change			X	X
Client Lookup			X	X
Net Drive Report				X
Campus Email Report			X	X
Service Account Report				X
Identity Report				X
Exchange Role Report			X	X
Long Distance Code Report			X	X
Compromised Account Report		X	X	X
Logout		X	X	X
Help		X	X	X

Admin Section Levels (links on left side of individual profile)

	User FE	View Only	ITC/ITS	ID Admin
Proxy Access				
Initiate Wizard(if inactive)				X
Sync Username				X
Password				X
Phone Password				X
Contact Information			X	X
Preferred First Name				X
Login Address				X
Cowboy Mail		X	X	X
Orange Mail		X	X	X
Microsoft Lync		X	X	X
Email Destination		X	X	X
Confidential Contact (Soft. Only)				
Alternate Email ²		X	X	X
Identification Card		X	X	X
Token				X
Long Distance Code ¹		X	X	X
Mark Invalid				X
Client Admin				
Delete Address or Phone				X
Text Authorization	X		X	X
Campus Alerts	X		X	X
Home Drive Information	X	X	X	X
Professional Last Name			X	X
Activation Code Switch			X	X
Migration Status				X
Username Change (Soft. Only)				
Resend Eligible to Activate Email ³		X	X	X
Receive Banner PIN ⁴	X	X	X	X
Banner PIN ⁵		X	X	X
Compromised Account		X	X	X
Microsoft Groups	X	X	X	X
Legacy ePrint Admin	X	X	X	X
Active Directory				
Active Directory Information		X	X	X
OpenLDAPs				
OpenLDAP Information		X	X	X
LDAP CN's		X	X	X
Service Accounts				
Create New Service Account				X
Current Service Account List ⁶	X	X	X	X
Reassign Service Accounts ⁶	X			X
Sync Service Account	X			X
Radius Openldap Accounts				
Short Term Guest / Wired		X	X	X
Roles & Groups				

Meta Roles				X
Global Groups		X	X	X
Email Distribution Lists		X	X	X
Logs				
Audit Log		X	X	X
Error Log		X	X	X
Services				
Course Information		X	X	X
Online Directory Email				X
Expertise Information			X	X
Software Keys			X	X
Add Notes		X	X	X
Voice Mail				X
Security Lock Information			X	X
Block Employee Services				X
Unblock Employee Services				X
Litigation Hold ⁷		X	X	X
User's Profile		X	X	X
Close User		X	X	X
Logout		X	X	X
Help		X	X	X

¹ Admin must be a member of STW_LONG_DIST_AC_ACCESS global group

² Admin must be a member of STW_IT_Alt_Email_Modifiers global group

³ Admin must be a member of a campus specific SUPPORT_PERSONNEL_SEND_PIN global group

⁴ Admin must be a member of a campus specific SUPPORT_PERSONNEL_SEND_PIN global group or one of the campus specific Registrar or HR PIN_VIEW global groups

⁵ Admin must be a member of a campus specific Registrar or HR PIN_VIEW global group

⁶ Available if the user is an owner of some service account.

⁷ View Only and ITS/ITC admins must be a member of STW_IT_SECURITY_LITIGATION global group

Profile Page Levels (information displayed in center of profile screen)

	User FE	View Only	ITC/ITS	ID Admin
Okey Password Expires	X	X	X	X
Okey Password Set Date		X	X	X
Okey Password Set By		X	X	X
First Name	X	X	X	X
Middle Initial	X	X	X	X
Last Name	X	X	X	X
Preferred Name	X	X	X	X
Professional Last Name	X	X	X	X
Privacy Flag	X	X	X	X
O-Key Username	X	X	X	X
Directory Key		X	X	X
SSN (last 5)				X
CWID	X	X	X	X
Banner ID	X	X	X	X
SCT OPID	X	X	X	X
Department Code	X	X	X	X
ISO		X	X	X
ID Card Issue Number		X	X	X
Birth Date			X	X
Affiliated Address		X	X	X
Affiliated Phone		X	X	X
Department		X	X	X
Date Activated		X	X	X
Shows In Exchange Address List		X	X	X
Update Mail Routing		X	X	X
Openldap Email address		X	X	X
Login Address	X	X	X	X
Email Destination	X	X	X	X
Alternate Email		X	X	X
Phone Password Question		X	X	X
Phone Password Response	X			X
Roles		X	X	X
Global Groups		X	X	X
Email Distribution Lists		X	X	X

Service Account Menu

	User FE	View Only	ITC/ITS	ID Admin
Personal Profile	X			
Service Account Profile	X	X	X	X
Edit Service Account Information	X			X
Change Password	X			X
Transfer Ownership	X			X
Extend Expiration Date	X			X
Global Groups				X
Add Secondary Owner	X			X
Remove Secondary Owner	X			X
Disable Account	X			
Change Email Address	X			X
Change Mailbox Rights	X			
Forwarding Address				X
Disable Account				X
Security Lock Information				X
Active Directory Information		X	X	X
Openldap Information		X	X	X
Audit Log		X	X	X
Error Log		X	X	X
Back to S.A. List (Service Accounts List)	X	X	X	X
Reassign Service Accounts	X			
DELETE Service Account	X			
User's Profile		X	X	X
Close Service Account		X	X	X
FAQ		X	X	X
Helpdesk		X	X	X
Logout		X	X	X

Access Level – VIEW ONLY – RETURN TO TOC

The following information will describe in detail what an admin at the View Only level can accomplish. Screen captures are provided for clarification. If any questions arise regarding this access level, please contact the OSU-Stillwater IT Helpdesk by calling 405-744-HELP (4357) or by emailing helpdesk@okstate.edu.

The following is a screen capture regarding what an admin at the View Only level can see after authentication. This screen is sometimes referred to as the Meta Lookup screen. We will now cover what each link on the left side of this screen can accomplish, and then we will cover the individual profiles.

ORANGE KEY ACCOUNT SERVICES

OKLAHOMA STATE UNIVERSITY

Accessed By: Lisa Woods
Accessed Time: January 22, 2019 12:48:57 PM

ADMIN LOOKUP

- Meta Lookup
- External Banner PIN
- Role Information
- Global Group Information
- Email Distribution List Information
- Global Group Request
- Email Distribution Admin
- Request Service Account
- Service Accounts By Department
- Short Term Guest / Wired Exception Accounts

META REPORTS

- Compromised Account Report

Logout
Help

O-Key Account Services Client Lookup

Client Lookup:

Username:

User ID:

Directory Key:

ISO:

CWID:

Banner ID:

Email:

First Name:

Last Name:

Phone Number:

OKLAHOMA STATE UNIVERSITY

- **Meta Lookup** – Returns Admin to this search screen
- **External Banner PIN** – Requires membership in one of the campus specific registrar / hr / ar global groups.
- **Role Information** – This is a list of O-Key Roles available and their definitions.
- **Global Group Information** – This is a list of O-Key global groups available and their definitions.
- **Email Distribution List Information**– This is a list of O-Key email distribution lists and their definitions. Distribution lists resemble global groups, but are mail-enabled (users can email a particular group of people associated with the list).
- **Global Group Request** – The Admin will use this page to generate a request for a new

global group. PLEASE NOTE: Global group requests should be submitted by the departmental or college ITC or local technical support.

- **Request Service Account** – The admin will use this page to generate a request for a new service account. PLEASE NOTE: Service account requests should be submitted by the departmental or college ITC or local technical support.
- **Service Accounts by Department** – The admin can search for all service accounts associated with a particular department code. For example, the department code for OSU-Stillwater Information Technology – Software Services is 100117.
- **Short Term Guest / Wired Exception Accounts** – View all the accounts.
- **Compromised Account Report** – Generate a report of compromised accounts.
- **Logout** – This link will log the Admin out of the O-Key Admin application.
- **Help** – This link will take the Admin to the Information Technology Helpdesk website.

We will assume that your purpose is to look up a particular customer. The following information will detail what an admin at the View Only level can see in a customer profile.



Active Account

Personal Profile For (Legal Name): Test User80
Accessed By: Lisa Woods
Accessed Time: January 22, 2019 1:01:23 PM

- CLIENT ADMIN**
- Home Drive Information
- Alternate Email
- Identification Card
- Cowboy Mail
- Orange Mail
- Microsoft Lync
- Email Destination
- Resend Eligible to Activate Email
- Receive Banner PIN
- Banner PIN
- Compromised Account
- Legacy ePrint Admin
- ACTIVE DIRECTORY**
- Active Directory Information
- OPENLDAP**
- OpenLDAP Information
- LDAP CN's
- PROOFPOINT**
- ProofPoint Information
- SERVICE ACCOUNTS**
- Create New Service Account
- RADIUS OPENLDAP ACCOUNTS**
- Short Term Guest / Wired Exception Accounts
- ROLES & GROUPS**
- Email Distribution Lists
- LOGS**
- Audit Log
- Error Log
- SERVICES**
- Course Information
- Litigation Hold
- Add Notes
- User's Profile
- Close User
- Logout

Personal Profile

Test User80 Profile:

O-Key Account Services Password:

Expires: 42 Days From Today
Date Set: 05-NOV-18
Set By: IPPEI

First Name:	Test
Middle Initial:	
Last Name:	User80
Preferred Name:	
Professional Last Name:	
Privacy Flag:	Privacy Act Not Invoked
O-Key Account Username:	sstst80
Directory Key:	462418
CWID:	09999920
Banner ID:	AoBannerID
SCT OPID:	
Department Code:	100117
ID Card Issue Number:	
OSU-Stillwater Affiliated Work Address:	IT BUILDING STILLWATER, OK 74078 405-744-4779
Phone:	
Department:	Stillwater
Software Services:	
Date Activated:	11/05/2018 04:31 PM
Update Mail Routing:	Yes
Show In Exchange Address List?	Yes
Email Information:	
OpenLDAP Mail Routing Address:	totoken@gmail.com
O-Key Login Address:	sstst80@okstate.edu
Email Destination:	totoken@gmail.com
Alternate Email:	totoken@gmail.com
Current Phone Password Question:	What is your challenge secret?
Roles:	
<u>Role</u>	<u>Expiration Date</u>
OSU SYSTEM - Student	
OSU SYSTEM - Student or ELI	
OSU SYSTEM - Past Student	
ADI/EX Eligible Employee	
OSU STILLWATER - Non-CORP 4 Active Staff	31-JAN-99
ALL CAMPUSES - MFA - ALL MIGRATED DEPARTMENTS	
ALL CAMPUSES - MFA - ALL MIGR DEPTS - NOT RESTR	
OSU SYSTEM AND NOC - Active Staff/CORP 4	
OSU STILLWATER - Employee Home Drives	
MySite_Eligible	
PROOF_POINT_EMPLOYEE	
Global Groups:	
<u>Group</u>	<u>Expiration Date</u>
STW_staff	
STW_IBRACELET_ELIGIBLE	
STW_Colvin_IMLeagues	
STW_MFA_REQUIRED_USERS	
ALL_OSU_SYSTEM_EMPLOYEES	
STW_SECUREFILE_BANNER_UPDATES	

CLIENT ADMIN

- Home Drive Information – This link will provide the network path to the customer's Home drive (H:\) storage space. If a Home drive is not assigned to the customer, you will see an indication that the “Information is not available at this time”
- Alternate Email – Admin must be in the STW_IT_Alt_Email_Modifiers global group
- Identification Card – Lock or Unlock an ID Card
- Cowboy Mail – View Cowboy Mail Info
- Orange Mail – View Orange Mail Info
- Microsoft Lync – View Microsoft Lync Info
- Email Destination – View Email Destination Info
- Resend Eligible to Activate Email – Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Receive Banner PIN – Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Banner PIN – Admin must in a campus specific Registrar or HR PIN_VIEW global group
- Compromised Account – View compromised account info
- Legacy ePrint Admin

ACTIVE DIRECTORY

- Active Directory Information

OPENLDAP

- OpenLDAP Information – This screen will show you the current mail routing address listed in LDAP, the DN, the list of CN's, and an indication as to whether or not the address will publish.
- LDAP CN's – A list of the current CN's for the customer. CN's can be viewed at the ITC/ITS level, and added/removed only at ID Level.

PROOFPOINT

- Proofpoint Information – View proofpoint information

RADIUS OPENLDAP ACCOUNTS

- Short Term Guest / Wired Exception Accounts – The admin must be a member of the STW_Short_Term_Guest_Access global group or the STW_Wired_Exceptions global group

ROLES & GROUPS:

- Email Distribution Lists –If the admin is an owner of an email distribution, they can manage the group here
- Global Group Admin – If the admin is an owner of a global group, they can manage the group here

LOGS:

- Audit Log – Used to view a history of account transactions/processing/updates for a specified time range. When changes are made to an account, it may update one column of data at a time. Therefore, you may see multiple entries for a single transaction. When a record associated with the account has been deleted, there is not a way to update the “Updated By” field, therefore it will use the last username known to have modified the account. Inserting and updating information will display the appropriate username of the admin who performed the action.
- Error Log – Used to view a history of account errors for a specified time range.

SERVICES:

- Course Information – List of courses in which the customer is enrolled.
- Expertise Information – For faculty only, used to display a photo and/or vitae information on the OSU News website.
- Add Notes – Displays the number of times the user has utilized the “Forgot Password” link, as well as any other notes a technician may want to add.
- User’s Profile – Will return the Admin to the main profile page of the user.
- Close User – Will return the Admin to the Meta Lookup screen.
- Logout – Will log the Admin out of the O-Key Admin application.

Access Level – ITC/ITS – RETURN TO TOC

The following information will describe in detail what an admin at the ITC/ITS level can accomplish. Screen captures are provided for clarification. If any questions arise regarding this access level, please contact the OSU-Stillwater IT Helpdesk by calling 405-744-HELP (4357) or by emailing helpdesk@okstate.edu.

The following is a screen capture regarding what an admin at the ITC/ITS level can see after authentication. This screen is sometimes referred to as the Meta Lookup screen. We will now cover what each link on the left side of this screen can accomplish, and then we will cover the individual profiles.

ORANGE KEY ACCOUNT SERVICES

Accessed By: Lisa Woods
Accessed Time: January 22, 2019 3:32:18 PM

O-Key Account Services Client Lookup

Client Lookup:

Username:

User ID:

Directory Key:

ISO:

CWID:

Banner ID:

Email:

First Name:

Last Name:

Phone Number:

ADMIN LOOKUP

- Meta Lookup
- External Banner PIN
- Role Information
- Global Group Information
- Email Distribution List Information
- Global Group Request
- Global Group Admin
- Email Distribution Admin
- Request Service Account
- Service Accounts By Department
- Short Term Guest / Wired Exception Accounts

META REPORTS

- Systems Migration
- Activation List
- Data Migration
- Exchange Report
- Name Change
- Client Lookup
- Campus Email Report
- Exchange Role Report
- Long Distance Code Report
- Compromised Account Report
- Logout
- Help

- **Meta Lookup** – Returns Admin to this search screen
- **External Banner PIN** – Requires membership in one of the campus specific registrar / hr / ar global groups.
- **Role Information** – This is a list of O-Key Roles available and their definitions.
- **Global Group Information** – This is a list of O-Key global groups available and their definitions.
- **Email Distribution List Information**– This is a list of O-Key email distribution lists and their definitions. Distribution lists resemble global groups, but are mail-enabled (users can email a particular group of people associated with the list).
- **Global Group Request** – The Admin will use this page to generate a request for a new global group. PLEASE NOTE: Global group requests should be submitted by the departmental or college ITC or local technical support.
- **Global Group Admin** – Batch remove users from global groups, add users to groups individually, generate a CSV file of group members.
- **Email Distribution Admin** - Batch remove users from distribution lists, add users to lists individually, generate a CSV file of list members.
- **Request Service Account** – The admin will use this page to generate a request for a new service account. PLEASE NOTE: Service account requests should be submitted by the departmental or college ITC or local technical support.
- **Service Accounts by Department** – The admin can search for all service accounts associated with a particular department code. For example, the department code for OSU-Stillwater Information Technology – Software Services is 100117.
- **Short Term Guest / Wired Exception Accounts** – View all the accounts.
- **Systems Migration** – Report related to the migration from Novell to Active Directory. Rarely used at this time.
- **Activation List** – Report of users eligible to activate an O-Key account.
- **Data Migration** – Batch change data migration status from yes to no, or vice versa. Rarely used at this time.
- **Exchange Report** – How many Exchange mailboxes have been created in a specified time range.
- **Name Change** – Report of users that have changed their last name in Meta in a specified time range. Rarely used at this time.
- **Client Lookup** – Show specific user information. Rarely used at this time.
- **Campus Email Report** – Generates a report of users that are eligible for an A&M campus email address. Used more often as the A&M's migrate to OSU's Exchange email system.
- **Long Distance Code Report**
- **Compromised Account Report** – Generate a report of compromised accounts.
- **Logout** – This link will log the Admin out of the O-Key Admin application.
- **Help** – This link will take the Admin to the Information Technology Helpdesk website

We will assume that your purpose is to look up a particular customer. The following information will detail what an admin at the ITC/ITS level can see in a customer profile.



Active Account

PROXY ACCESS

- Contact Information
- Alternate Email
- Identification Card
- Cowboy Mail
- Orange Mail
- Microsoft Lync
- Email Destination

CLIENT ADMIN

- Text Authorization
- Campus Alerts
- Home Drive Information
- Professional Last Name
- Activation Code Switch
- Re-send Eligible to Activate Email
- Receive Banner PIN
- Banner PIN
- Compromised Account
- Legacy ePrint Admin

ACTIVE DIRECTORY

- Active Directory Information

OPENLDAP

- OpenLDAP Information
- LDAP CN's

PROOFPOINT

- ProofPoint Information

SERVICE ACCOUNTS

- Create New Service Account

RADIUS OPENLDAP ACCOUNTS

- Short Term Guest / Wired Exception Accounts

ROLES & GROUPS

- Email Distribution Lists
- Global Groups

LOGS

- Audit Log
- Error Log

SERVICES

- Course Information
- Expertise Information
- Software Keys

Add Notes

Security Lock Information

Litigation Hold

User's Profile

Close User

Logout

Personal Profile For (Legal Name): Test User80
 Accessed By: Lisa Woods
 Accessed Time: January 22, 2015 3:42:23 PM

Personal Profile

Test User80 Profile:

O-Key Account Services Password: _____
 Expires: 42 Days From Today
 Date Set: 05-NOV-18
 Set By: IPPEI

First Name:	Test
Middle Initial:	
Last Name:	User80
Preferred Name:	
Professional Last Name:	
Privacy Flag:	Privacy Act Not Invoked
O-Key Account Username:	sstst80
Directory Key:	462416
CWID:	09999920
Banner ID:	AcBannerID
SCT OPID:	
Department Code:	100117
ID Card Issue Number:	
Birth Date:	01-JAN-01

OSU-Stillwater Affiliated Work Address:	IT BUILDING STILLWATER, OK 74078 405-744-4779
Phone:	

Department:	Stillwater
Software Services	
Date Activated:	11/05/2013 04:31 PM
Update Mail Routing:	Yes
Show in Exchange Address List?	Yes

Email Information:	
OpenLDAP Mail Routing Address:	totoken@gmail.com
O-Key Login Address:	sstst80@okstate.edu
Email Destination:	totoken@gmail.com
Alternate Email:	totoken@gmail.com

Current Phone Password Question:	What is your challenge secret?
Current Phone Password Response:	SECRET

Roles:	
<u>Role</u>	<u>Expiration Date</u>
OSU SYSTEM - Student	
OSU SYSTEM - Student or ELI	
OSU SYSTEM - Past Student	
OSU STILLWATER - Non-CORP 4 Active Staff	31-JAN-99
OSU SYSTEM AND NOC - Active Staff/CORP 4	
AD/EX Eligible Employee	
OSU STILLWATER - Employee Home Drives	
MySite_Eligible	
PROOF_POINT_EMPLOYEE	
ALL CAMPUSES - MFA - ALL MIGRATED DEPARTMENTS	
ALL CAMPUSES - MFA - ALL MIGR DEPTS - NOT RESTR	

Global Groups:	
<u>Group</u>	<u>Expiration Date</u>
STW_IT_employees	
STW_IT_SOFTWARE_SERVICES_RW	
STW_Colvin_ILLeagues	
STW_MFA_REQUIRED_USERS	
STW_SECUREFILE_BANNER_UPDATES	
OSU_BAN_PORTAL_EMPLOYEE	
STW_staff	
STW_IBRACELET_ELIGIBLE	
STW_IT_CUCM	
STW_Reslife_HousingEligible	
STW_SECUREFILE_SDC_IDENTITYFINDER	
ALL_OSU_SYSTEM_EMPLOYEES	
STW_STAFF_KW	

PROXY ACCESS

- Contact Information
- Alternate Email
- Identification Card
- Cowboy Mail
- Orange Mail
- Microsoft Lync
- Email Destination

CLIENT ADMIN

- Text Authorization
- Campus Alerts
- Home Drive Information – This link will provide the network path to the customer's Home drive (H:\) storage space. If a Home drive is not assigned to the customer, you will see an indication that the "Information is not available at this time"
- Professional Last Name – Used to set a last name other than the user's legal surname. Performed at the ITC/ITS and ID Levels only. Doing so should result in a firstname.professionallastname@okstate.edu email address option, if that address is available.
- Activation Code Switch – Enable / Disable the activation code switch for the user. This should only be used if the user does not have an alternate email address or a cell phone number set up in Campus Alerts (Rave Mobility) and they have verified their phone password.
- Resend Eligible to Activate Email - Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Receive Banner PIN - Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Banner PIN - Admin must in a campus specific Registrar or HR PIN_VIEW global group
- Compromised Account – Mark the user as compromised
- Legacy ePrint Admin – View legacy eprint information

ACTIVE DIRECTORY

- Active Directory Information

OPENLDAP INFORMATION:

- OpenLDAP Information – This screen will show you the current mail routing address listed in LDAP, the DN, the list of CN's, and an indication as to whether or not the address will publish.
- LDAP CN's – A list of the current CN's for the customer. CN's can be viewed at the ITC/ITS level, and added/removed only at ID Level.

PROOFPOINT INFORMATION:

- ProofPoint Information – List of CN's associated with the Spam Blocker system. The Spam Blocker settings will apply to the email addresses listed for the user.

SERVICE ACCOUNTS:

- Create New Service Account – Software Services Level Only. Used to generate requested service accounts.
- Current Service Account List – List of service accounts for which the user is assigned as

a Primary or Secondary owner.

- Reassign Service Accounts – Used to reassign ALL of the service accounts associated with the user to another full-time staff member (ownership level is maintained). In Admin, at the ID Level only.

ROLES & GROUPS:

- Email Distribution Lists – If the admin is an owner of an email distribution, they can manage the group here
- Global Group Admin – If the admin is an owner of a global group, they can manage the group here

LOGS:

- Audit Log – Used to view a history of account transactions/processing/updates for a specified time range. When changes are made to an account, it may update one column of data at a time. Therefore, you may see multiple entries for a single transaction. When a record associated with the account has been deleted, there is not a way to update the “Updated By” field, therefore it will use the last username known to have modified the account. Inserting and updating information will display the appropriate username of the technician who performed the action.
- Error Log – Used to view a history of account errors for a specified time range.

SERVICES:

- Course Information – List of courses in which the customer is enrolled.
- Expertise Information – For faculty only, used to display a photo and/or vitae information on the OSU News website.
- Software Keys – If user downloads MS Vista, they will need this key code to install the product.
- Add Notes – Displays the number of times the user has utilized the “Forgot Password” link, as well as any other notes a technician may want to add.
- Security Lock Information – Used to Lock or Unlock an O-Key account. Unlock is available at the ID level only.
- Litigation Hold
- User’s Profile – Will return the Admin to the main profile page of the user.
- Close User – Will return the Admin to the Meta Lookup screen.
- Logout – Will log the Admin out of the O-Key Admin application.

Access Level – ID – RETURN TO TOC

The following information will describe in detail what an admin at the ID level can accomplish. Screen captures are provided for clarification. If any questions arise regarding this access level, please contact the OSU-Stillwater IT Helpdesk by calling 405-744-HELP (4357) or by emailing helpdesk@okstate.edu. The appropriate IT personnel will be contacted.

The following is a screen capture regarding what an admin at the ID level can see after authentication. This screen is sometimes referred to as the Meta Lookup screen. We will now cover what each link on the left side of this screen can accomplish, and then we will cover the individual profiles.

ORANGE KEY ACCOUNT SERVICES

Accessed By: Lisa Woods
Accessed Time: January 22, 2019 4:13:32 PM

O-Key Account Services Client Lookup

Client Lookup:

Username:

User ID:

SSN:

Directory Key:

ISO:

CWID:

Banner ID:

Email:

First Name:

Last Name:

Phone Number:

ADMIN LOOKUP

- Meta Lookup
- External Banner PIN
- Move Home Drives
- Role Information
- Global Group Information
- Email Distribution List Information
- Global Group Request
- Global Group Admin
- Email Distribution Admin
- Request Service Account
- Service Accounts By Department
- Short Term Guest / Wired Exception Accounts

META REPORTS

- Systems Migration
- Activation List
- Data Migration
- Exchange Report
- Rollback Report
- Name Change
- Client Lookup
- Net Drive Report
- Campus Email Report
- Service Account Report
- Identity Report
- Exchange Role Report
- Long Distance Code Report
- Compromised Account Report

Logout

- **Meta Lookup** – Returns Admin to this search screen
- **External Banner PIN** – Requires membership in one of the campus specific registrar / hr / ar global groups.
- **Move Home Drives** – Typically, Server Admin use only. Move H:\ from one server to another. For example, if a Tulsa employee becomes a Stillwater student, and wants the H:\ to be with Stillwater instead of Tulsa. Server Admin group will move H:\ to the appropriate server, then use this function to ensure that O-Key syncs with the change.
- **Role Information** – This is a list of O-Key Roles available and their definitions.
- **Global Group Information** – This is a list of O-Key global groups available and their definitions.
- **Email Distribution List Information**– This is a list of O-Key email distribution lists and their definitions. Distribution lists resemble global groups, but are mail-enabled (users can email a particular group of people associated with the list).
- **Global Group Request** – The Admin will use this page to generate a request for a new global group. PLEASE NOTE: Global group requests should be approved by the departmental or college ITC or local technical support.
- **Global Group Admin** – Batch remove users from global groups, add users to groups individually, generate a CSV file of group members.
- **Email Distribution Admin** - Batch remove users from distribution lists, add users to lists individually, generate a CSV file of list members.
- **Request Service Account** – The admin will use this page to generate a request for a new service account. PLEASE NOTE: Service account requests should be approved by the departmental or college ITC or local technical support.
- **Service Accounts by Department** – The admin can search for all service accounts associated with a particular department code. For example, the department code for OSU-Stillwater Information Technology – Software Services is 100117.
- **Short Term Guest / Wired Exception Accounts** – View all the accounts.
- **Systems Migration** – Report related to the migration from Novell to Active Directory. Rarely used at this time.
- **Activation List** – Report of users eligible to activate an O-Key account.
- **Data Migration** – Batch change data migration status from yes to no, or vice versa. Rarely used at this time.
- **Exchange Report** – How many Exchange mailboxes have been created in a specified time range.
- **Rollback Report** – Typically, used by Software Services only. List of successfully rolled back O- Key accounts. Rollbacks can be performed for users that are no longer associated with the university (such as a graduate) that no longer wishes to receive password/account expiration notifications. A rolled back account reverts the activation status to resemble someone that has never activated.
- **Name Change** – Report of users that have changed their last name in Meta in a specified time range. Rarely used at this time.
- **Client Lookup** – Show specific user information. Rarely used at this time.
- **Net Drive Report** – Generates a report of those users that have a net drive on a server other than what their primary net drive would indicate. Rarely used at this time.
- **Campus Email Report** – Generates a report of users that are eligible for an A&M campus email address. Used more often as the A&M's migrate to OSU's Exchange email system.
- **Service Account Report**

- **Identity Report**
- **Exchange Role Report**
- **Long Distance Code Report**
- **Compromised Account Report**
- **Logout** – This link will log the Admin out of the O-Key Admin application.
- **Help** – This link will take the Admin to the Information Technology Helpdesk website.

We will assume that your purpose is to look up a particular customer. The following information will detail what an admin at the ID Admin level can see in a customer profile. The first screen capture is of the top portion of the screen, and the next capture is of the bottom portion of the screen once you've scrolled down.



Active Account

PROXY ACCESS

- Sync Username
- Password
- Phone Password
- Contact Information
- Preferred First Name
- Login Address
- Cowboy Mail
- Orange Mail
- Microsoft Lync
- Email Destination
- Alternate Email
- Identification Card
- Token
- Mark Invalid

CLIENT ADMIN

- Delete Address or Phone
- Text Authorization
- Campus Alerts
- Home Drive Information
- Professional Last Name
- Activation Code Switch
- Migration Status
- Resend Eligible to Activate Email
- Receive Banner PIN
- Banner PIN
- Compromised Account
- Microsoft Groups
- Legacy ePrint Admin

ACTIVE DIRECTORY

- Active Directory Information

OPENLDAPS

- OpenLDAP Information
- LDAP CN's

PROOFPOINT

- ProofPoint Information

Personal Profile For (Legal Name): Test User80
 Accessed By: Lisa Woods
 Accessed Time: January 22, 2019 4:34:04 PM

Personal Profile

Test User80 Profile:

O-Key Account Services Password:
 Expires: 42 Days From Today
 Date Set: 05-NOV-18
 Set By: IPPEI

First Name:	Test
Middle Initial:	
Last Name:	User80
Preferred Name:	
Professional Last Name:	
Privacy Flag:	Privacy Act Not Invoked
O-Key Account Username:	ssst80
Directory Key:	462416
CWID:	09999920
Banner ID:	AoBannerID
SSN:	00180
SCT OPID:	
Department Code:	100117
ID Card Issue Number:	
Birth Date:	01-JAN-01
OSU-Stillwater Affiliated Work Address:	IT BUILDING STILLWATER, OK 74078 405-744-4779
Phone:	
Department:	Software Services Stillwater
Date Activated:	11/05/2018 04:31 PM
Update Mail Routing:	Yes
Show In Exchange Address List?	Yes
Email Information:	
OpenLDAP Mail Routing Address:	totoken@gmail.com
O-Key Login Address:	ssst80@okstate.edu
Email Destination:	totoken@gmail.com
Alternate Email:	totoken@gmail.com
Current Phone Password Question:	What is your challenge secret?
Current Phone Password Response:	SECRET
Roles:	
Role	Expiration Date
OSU SYSTEM - Student	

SERVICE ACCOUNTS	OSU SYSTEM - Student OSU SYSTEM - Student or ELI OSU SYSTEM - Past Student OSU SYSTEM AND NOC - Active Staff/CORP 4 AD/EX Eligible Employee MySite_Eligible	
Create New Service Account		
RADIUS OPENLDAP ACCOUNTS	OSU STILLWATER - Non-CORP 4 Active Staff OSU STILLWATER - Employee Home Drives PROOF_POINT_EMPLOYEE ALL CAMPUSES - MFA - ALL MIGRATED DEPARTMENTS ALL CAMPUSES - MFA - ALL MIGR DEPTS - NOT RESTR	31-JAN-99
Short Term Guest / Wired Exception Accounts		
ROLES & GROUPS		
Meta Roles	Global Groups:	
Email Distribution Lists	Group	Expiration Date
Global Groups	STW_SECUREFILE_BANNER_UPDATES	
	STW_staff	
	STW_IBRACELET_ELIGIBLE	
	STW_IT_employees	
	STW_Reslife_HousingEligible	
	STW_ColVn_ILLeagues	
	ALL_OSU_SYSTEM_EMPLOYEES	
	OSU_BAN_PORTAL_EMPLOYEE	
	STW_STAFF_KW	
	STW_IT_SOFTWARE_SERVICES_RW	
	STW_IT_CUCM	
	STW_SECUREFILE_SDC_IDENTITYFINDER	
	STW_MFA_REQUIRED_USERS	
	Email Distribution Lists:	
	Group	Expiration Date
	STW-EOC-Email-List	
	STWHT-Department	
	STWHT-Software-Services	
	OSU-Faculty-Staff	
	STWHR-NYCU	
	STW-faculty-staff	
	OSU-SAC	
	STWHTLE-StaffList	
	Stillwater-SAC	
	STW-COMM-OSU-FACULTY-STAFF	
	STW-COMM-STW-FACULTY-STAFF	
	STWHR-TRAINING	
	STW-COMM-SAC	
SERVICES		
Course Information		
Online Directory Email		
Expertise Information		
Software Keys		
Voice Mail		
Add Notes		
Security Lock Information		
Block Employee Services		
Litigation Hold		
User's Profile		
Close User		
Logout		

PROXY ACCESS

- Sync Username – Used to sync a user's O-Key username with their PRISM userid.
- Password – Used to change a user's O-Key password.
- Phone Password – Used to change a user's challenge question or response.
- Contact Information – Used to change a user's preferred first name or campus contact information.
- Preferred First Name
- Login Address – Used to choose an Exchange email address.
- Cowboy Mail
- Orange Mail
- Microsoft Lync
- Email Destination – Used to choose whether or not to forward inbound email.
- Alternate Email
- Identification Card
- Token
- Mark Invalid

CLIENT ADMIN

- Delete Address or Phone – Used to resolve issues with conflicting addresses (multiple campuses, etc.)
- Text Authorization – Used to turn on / off the authorization to receive the password reset token via cell phone
- Campus Alerts – View phone numbers that the user has set in Campus Alerts (Rave Mobility)
- Home Drive Information – This link will provide the network path to the customer's Home drive (H:) storage space. If a Home drive is not assigned to the customer, you will see an indication that the "Information is not available at this time"
- Professional Last Name – Used to set a last name other than the user's legal surname. Performed at the ID Level only. Doing so should result in a firstname.professionallastname@okstate.edu email address option, if that address is available.
- Activation Code Switch – Enable / Disable the activation code switch for the user. This should only be used if the user does not have an alternate email address or a cell phone number set up in Campus Alerts (Rave Mobility) and they have verified their phone password.
- Migration Status – Mail Migrated / Data Migrated / Workstation Migrated options are not used at this time. However, this screen will indicate whether or not this user will show in the Exchange Address List.
- Resend Eligible to Activate Email - Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Receive Banner PIN - Admin must be in a campus specific SUPPORT_PERSONNEL_SEND_PIN global group
- Banner PIN - Admin must in a campus specific Registrar or HR PIN_VIEW global group
- Compromised Account – Mark the user as compromised
- Legacy ePrint Admin – View legacy eprint information of the user
- Microsoft Groups – View Microsoft Groups that are owned by the user

OPENLDAP INFORMATION:

- OpenLDAP Information – This screen will show you the current mail routing address listed in LDAP, the DN, the list of CN's, and an indication as to whether or not the address will publish.
- LDAP CN's – A list of the current CN's for the customer. CN's can be viewed at the ITC/ITS level, and added/removed only at ID Level.

PROOFPOINT INFORMATION:

- ProofPoint Information – List of CN's associated with the Spam Blocker system. The Spam Blocker settings will apply to the email addresses listed for the user.

SERVICE ACCOUNTS:

- Create New Service Account – Software Services Level Only. Used to generate requested service accounts.
- Current Service Account List – List of service accounts for which the user is assigned as a Primary or Secondary owner.
- Reassign Service Accounts – Used to reassign ALL of the service accounts associated with the user to another full-time staff member (ownership level is maintained). In Admin, at the ID Level only.

ROLES & GROUPS:

- Meta Roles – This screen will show you the current Meta roles assigned to the customer. At the ID Level only, you will have the opportunity to remove a role or manually add a role.
- Email Distribution Lists – This screen will show you the current Email Distribution Lists to which the customer is subscribed. At the ID Level only, you will have the opportunity to remove a list or manually add the person to a list.
- Global Groups – This screen will show you the current Global Groups with which the customer has been associated, as listed in Meta. At the ID Level only, you will have the opportunity to remove them from, or manually add them to, a global group.

LOGS:

- Audit Log – Used to view a history of account transactions/processing/updates for a specified time range. When changes are made to an account, it may update one column of data at a time. Therefore, you may see multiple entries for a single transaction. When a record associated with the account has been deleted, there is not a way to update the “Updated By” field, therefore it will use the last username known to have modified the account. Inserting and updating information will display the appropriate username of the technician who performed the action.
- Error Log – Used to view a history of account errors for a specified time range.

SERVICES:

- Course Information – List of courses in which the customer is enrolled.
- Online Directory Email – The email address that will display for this user in Online Directory.
- Expertise Information – For faculty only, used to display a photo and/or vitae information on the OSU News website.
- Software Keys – If user downloads MS Vista, they will need this key code to install the product.
- Voice Mail – Used to change the Voice Mail PIN for their campus land line, or set an Operator number (forwards to this number if the caller goes to voicemail).
- Add Notes – Displays the number of times the user has utilized the “Forgot Password” link, as well as any other notes a technician may want to add.
- Security Lock Information – Used to Lock or Unlock an O-Key account. Unlock is available at the ID level only.
- Block Employee Services – Used to delete all employee services associated with the user, but retain student services. Blocking and Unblocking employee services is subject to authorization by Systems Security, the Director or Server Administration, and/or the Director of Technology Support.
- Litigation Hold
- User’s Profile – Will return the Admin to the main profile page of the user.
- Close User – Will return the Admin to the Meta Lookup screen.
- Logout – Will log the Admin out of the O-Key Admin application.

How to access O-Key Admin – RETURN TO TOC

1. Go to okey.okstate.edu/admin
2. URLs for the A&M campuses
 - apps.okstate.edu/okey/langston_admin
 - apps.okstate.edu/okey/neo_admin
 - apps.okstate.edu/okey/connors_admin
 - apps.okstate.edu/okey/panhandle_admin
3. Authenticate using your IDMS credentials
4. You should then see the Meta Lookup page.

How to search for a profile via O-Key Admin – RETURN TO TOC

Once logged in to IDMS Admin, and you see the Meta Lookup page you can search for an individual user/account by the following variables, then click Search.

- | | |
|--|--------------------------|
| 1. Username | 6. Campus Wide ID (CWID) |
| 2. User ID | 7. Banner ID |
| 3. SSN | 8. Email |
| 4. Directory key | 9. First Name |
| 5. ISO (Number on the face of their OSU ID Card) | 10. Last Name |
| | 11. Phone Number |

What are Roles and Groups in O-Key? – RETURN TO TOC

Roles: Used in O-Key to allocate access to IT services. The services allocated depend on the type of role(s) the individual is assigned. The types of roles assigned depend on the type(s) of associations with the university the person maintains. Various types of roles have expiration dates associated.

Global Groups and Email Distribution Lists: Stored in Active Directory, managed through IDMS, these groups are also used to allocate access to IT services. The groups assigned sometimes depend on the type(s) of associations with the university the person maintains. Group memberships can have an expiration date, but usually only when the membership is manually assigned.

What if a customer has multiple profiles? – RETURN TO TOC

Multiple IDMS accounts for a single individual are normally caused duplicates in Banner. OSU-OKC could have one social security number, while OSU-Stillwater has another, for example. If you, as an IDMS Admin, encounter such an issue, send an email to helpdesk@okstate.edu with the customer's name, both Banner IDs, and a description of the problem that the client is facing.

Where does a customer go to get assistance activating? – RETURN TO TOC

Refer the customer to the OSU-Stillwater IT Helpdesk by having them call 405-744-HELP (4357), by emailing helpdesk@okstate.edu, or by visiting 421 Classroom Building. A Helpdesk technician will be more than happy to assist. You could also refer them to the OSU IT 4-HELP Home, which will provide them with online instruction:

it.sp.okstate.edu/itservices/4help

What are some common reasons for not being able to activate? – RETURN TO TOC

The most common reasons are as follows:

The user has not received their PIN to activate. Usually the alternate email address on their account is misspelled or out of date.

The employee's employment has not been fully processed. Often the employee is under the impression that their EA has been processed and that something is wrong with IDMS. More often than not, the EPAF has not been fully approved or HR has not completed the EPAF. Ask the employee to check the status of their employment by contacting their Human Resources representative for their department.

How can the customer setup a Preferred First Name? – RETURN TO TOC

Some customers want to be known by a name other than their legal first name. In order to display in the Exchange Address List as that preferred first name, and to generate an email address including the preferred name, ask the customer to perform the following action...

1. Login to their IDMS account
2. When viewing the O-Key Profile, click on the Preferred First Name link
3. Enter a Preferred First Name in the field provided at the top of the screen.
4. Click on Save

They can then click on Change Login Address on the left side of the profile page. They should see a preferredfirstname.lastname@okstate.edu email address option. If the option is not listed, it is possible that someone in the A&M System already has that email address.

What if a customer uses a Professional Last Name? – RETURN TO TOC

Some customers want to be known by a name other than their legal last name. In order to display in the Exchange Address List as that professional last name, and to generate an email address including the professional name, the ITC/ITS and ID Admin levels can make that change.