|  |  |
| --- | --- |
| FSAM/MIM USER GUIDE Topics | Page numbers |
| 1.1 Manage Users including | Pages 2 - 4 |
| Search Users | Page 2 |
| Check Group Membership | Page 2 |
| Add Self to Group | Pages 2-3 |
| Remove Self from Group | Pages 3-4 |
|  |  |
| 1.2 Manage Groups | Page 5 |
| Search Groups | Page 5 |
| Create a UDC Group | Pages 5-6-7 |
| Create an ORG Group | Page 8 |
| Modify Groups Members | Pages 8-9 |
| Add members to Multiple Groups | Pages 10-11 |
| Mail Enable a Group | Pages 11-12 |
| File Share Enable a Group | Pages 12-13 |
|  |  |
| 1.3 Approvals | Page 13 |
| View or Cancel a Pending Request | Page 13 |
| Respond to a request for Approval | Page 14 |

USER GUIDE FOR FSAM/MIM UPGRADE in MAY 2022

## Manage Users

### Search Users

|  |  |
| --- | --- |
| Aim | Find a user’s profile in the MIM Portal |
| Access Role | MIM User |
| 1. On the Users page enter a search string in the “Search for” box and click the magnifying glass icon. 2. The search string may be:  * The Account Name, * Part of the first name, or * Part of the last name.  1. Note: do not attempt to search on more than one partial string. | Graphical user interface, table  Description automatically generated with medium confidence |
| To search among only Staff or only Students, select an option under “Search within” before searching. | Text  Description automatically generated with low confidence |

### Check Group Membership

|  |  |
| --- | --- |
| Aim | Check membership of a MIM-managed group. |
| Access Role | MIM User |
| To see which MIM-managed groups a user belongs to:  Open their profile in the MIM Portal and click the “Membership” tab.  NOTES:   * This only shows direct group membership and does not enumerate groups inherited through nesting. * Clicking a group name here views the group but cannot edit it – to change a group, locate it through the Groups page. | Graphical user interface, text, application  Description automatically generated |

### Add Self to a Group

|  |  |
| --- | --- |
| Aim | Add or remove self from a group |
| Access Role | Member of “MIM Users” Set |
| Search for the group to join or leave | See 1.2.1 Search Groups |
| Tick the group and then click the “Join” button | Graphical user interface, application, Teams  Description automatically generated |
| Click Submit | Graphical user interface, text, application, email  Description automatically generated |
| If approval is needed a “Pending approval” message will show up.  Check the status of the approval on the “Manage My Requests” page. | Graphical user interface, text, application, email  Description automatically generated |

### Remove Self from Group

|  |  |
| --- | --- |
| Aim | Add or remove self from a group |
| Access Role | Member of “MIM Users” Set, current member of group |
| Search for the group to join or leave | See 1.2.1 Search Groups |
| Tick the group and then click the “Leave” button | Graphical user interface, application, Teams  Description automatically generated |
| Click Submit | Graphical user interface, text, application, email  Description automatically generated |
| The request completes without approval. | Graphical user interface, text, application, email  Description automatically generated |

## Manage Groups

### Search Groups

|  |  |
| --- | --- |
| Aim | Locate a group in the MIM Portal |
| Access Role | MIM User |
| In the MIM Portal, click “Groups” on the left side or home page menu. | Graphical user interface, text, application, email  Description automatically generated |
| Enter part of the group’s name in the search box and click the magnifying glass icon to search all groups. | Graphical user interface, text, application  Description automatically generated |
| To limit the search to one specific OU, select that from the “Search within” drop-down, before clicking the magnifying glass. | Graphical user interface, text, application  Description automatically generated |

### Create a UDC Group

|  |  |
| --- | --- |
| Aim | Create a UDC group |
| Access Role | MIM User |
| On the Groups page, click the “New” button.  The Group Creation form appears. | A picture containing text  Description automatically generated |
| Leave on the default option “UDC” | A picture containing background pattern  Description automatically generated |
| Click the “Browse” button next to “Parent” | A picture containing table  Description automatically generated |
| Search for the group that will be hierarchically above this one. The new group will inherit the OU and naming from the selected parent.  Once the parent group is located, tick it, and click “OK”. | Graphical user interface, text, application, Word  Description automatically generated |
| Fill in the Name. This is just the end, user-defined part of the name – it is no necessary to enter the full hierarchical.name. |  |
| The “File Share Enabled” and “Mail Enabled” options can either be ticked now, or in a later modification to the group. |  |
| Enter a Description.  Click Next to go to the next tab. | Graphical user interface, application  Description automatically generated |
| On the Members tab, click the Browse button and search for users to add. | Graphical user interface, text, application  Description automatically generated |
| Alternatively, change the “Search within” option to “ORG Groups” and select one or more groups to be members.  Click Next to move to the next tab. | Graphical user interface, application, table  Description automatically generated |
| On the Owners tab, click the Browse button and search for the group to be the owner of this new group. | Graphical user interface, text, application, email  Description automatically generated |
| Alternatively, if there is not a suitable existing group, change the “Search within” option to “Staff” and search for users to own the group.  **NOTE: At least 3 users must be selected, or else your creation request will be rejected.** | Graphical user interface, application  Description automatically generated |
| Click Next and check the summary is correct before clicking “Submit”.  If anything needs correcting first, use the Back button to return to a previous tab. | Graphical user interface, application  Description automatically generated |
| If approval is required, you will see a “Pending approval” status message. The group will not be created until the approval process is complete.  Click OK. | Graphical user interface, text, application, email  Description automatically generated |
| To monitor the status of the request, click “Manage My Requests” on the left side menu.  The request may be viewed or cancelled here however it cannot be changed. | Background pattern  Description automatically generated |

### Create an ORG Group

|  |  |
| --- | --- |
| Aim | Create an ORG group |
| Access Role | MIM User, or MIM Administrator if this is the first group in a new OU. |
| The process is much the same as for a UDC group, with the following minor changes.  Select “ORG” as the Category. | Background pattern  Description automatically generated |
| When selecting the parent, if this is the first ORG group in a new OU, switch the “Search within” option to “All OrgUnits” and search for the org unit.  NOTE: The process “Add a new Organisation Unit” will need to have been followed first. | Graphical user interface, application  Description automatically generated |

### Modify a Group’s members

|  |  |
| --- | --- |
| Aim | Change a group’s members |
| Access Role | MIM User |
| Locate the group to be changed and click to open it,  Change to the Members tab | Graphical user interface, text, application, email  Description automatically generated |
| To Add members, click the Browse button next to the “Members to Add” box and find the members to add. | Graphical user interface, application, table  Description automatically generated |
| Depending on the type of group and the requestor different options are offered under “Search within” and be able to add groups and/or users. | Graphical user interface, application  Description automatically generated |
| To remove members, click the Browse button next to the “Members to Remove” box and tick the members to remove. | Graphical user interface, application, table  Description automatically generated |
| Click OK | Graphical user interface, application, email  Description automatically generated |
| Click Submit.  An approval process may be triggered – if so another screen with the message “Pending approval” will be shown. | Graphical user interface, text, application, email  Description automatically generated |

### Add members to multiple groups

|  |  |
| --- | --- |
| Aim | Add members to multiple groups |
| Access Role | MIM User |
| Search for a tick the groups to be modified | Graphical user interface, text  Description automatically generated with medium confidence |
| If different search strings need to be entered to find all the groups, any selected groups remain selected. Refer to the “Selected Items” list at the bottom of the page to see all selected groups. | Graphical user interface, text, application, email  Description automatically generated |
| Click the “Add Members” button,  Use the lookup button to fine the user/s to add to the group,  Click Next. | Graphical user interface, text, application, email  Description automatically generated |
| Review the changes then click “Submit” to request the changes,  Approvals will be triggered if applicable. | Graphical user interface, text, application, email  Description automatically generated |

### Mail Enable a Group

|  |  |
| --- | --- |
| Aim | Convert an ORG or UDC group to a mail-enabled Security group.  Option is not available for ROLE groups (which are mail-enabled by default) or TASK groups. Option cannot be un-ticked once set. |
| Access Role | MIM User |
| Locate the group and open it.  Tick the “Mail Enabled” option and then submit the change.  Depending on the requestor there may be an approval process at this point. | Graphical user interface, application, table  Description automatically generated |
| Following completion of the change, an email address and new Display Name will be generated for the group.  Note that there will be a delay before the group is available in Outlook. | Graphical user interface, text, application, email  Description automatically generated |

### File Share Enable a Group

|  |  |
| --- | --- |
| Aim | Create a file share for an ORG or UDC group.  Option is not available for ROLE or TASK groups. Option cannot be un-ticked once set. |
| Access Role | MIM User |
| Locate the group and open it.  Tick the “File Share Enabled” option and then submit the change.  Depending on the requestor there may be an approval process at this point.  Note that there will be a delay before the file share is created. | Graphical user interface, text, application  Description automatically generated |

## Approvals

### View or Cancel a Pending Request

|  |  |
| --- | --- |
| Aim | Check the status of a request that is pending approval |
| Access Role | Creator of the request |
| Click the “Manage My Requests” menu option on the left side menu to see any recent requests. | Graphical user interface, text, application  Description automatically generated |
| To cancel a request that is in the “Authorising” state, tick to select and then click “Cancel”. | Graphical user interface, application, Teams  Description automatically generated |

### Respond to a request for approval

|  |  |
| --- | --- |
| Aim | Accept or reject a request |
| Access Role | Approver |
| All approvers will receive an email notifying them that a request requires approval.  Either click the link in the email or open the MIM Portal and navigate to the “Approve Requests” page. | Graphical user interface, text, application, email  Description automatically generated |
| To see more information about the request, click on its Title and navigate to the “Detailed Content” tab. | Application  Description automatically generated with low confidence |
| To complete the request, tick to select and then click either “Approve” or “Reject”. | Graphical user interface, application  Description automatically generated |