Centers for Medicare & Medicaid Services
CMS eXpedited Life Cycle (XLC)

Identity Management (IDM)

My Reports Quick Reference Guide

Version 1.0
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1.   Introduction

My Reports provides approved users of the Identity Management (IDM) System with the ability to view one or more types of reports. The purpose of these reports is to assist users with the task of effectively managing other users under their authority.

Table 1 provides a summary of the IDM reports that are available to Application Business Owners (BO), Application Business Owner Representatives (BOR), and Application (Tier 1) Helpdesk (HD) users as of the date this user guide was published.

Note: Approved users who are granted access to My Reports will not automatically receive access to every report. A user is granted access to reports based on that user's specific role or roles.
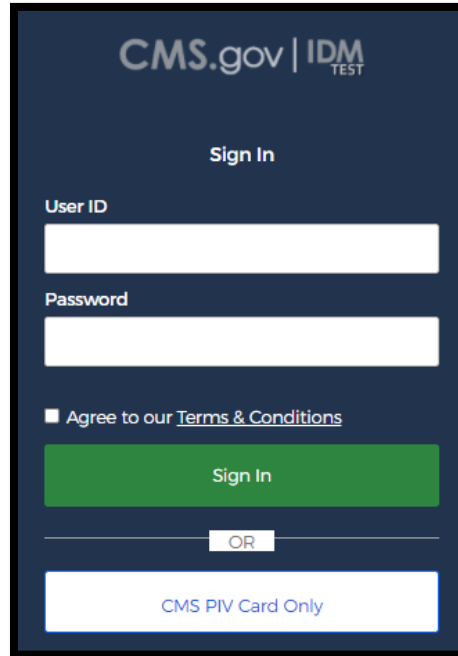
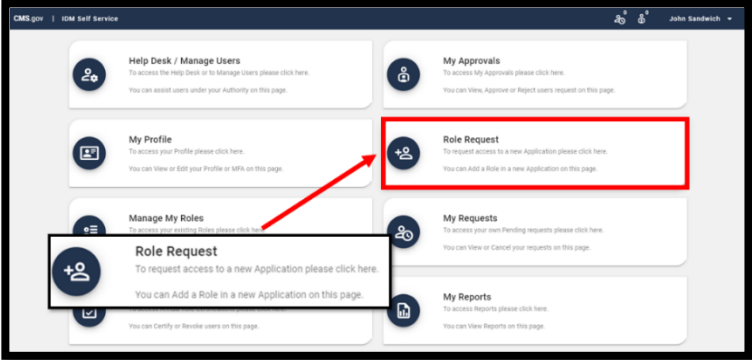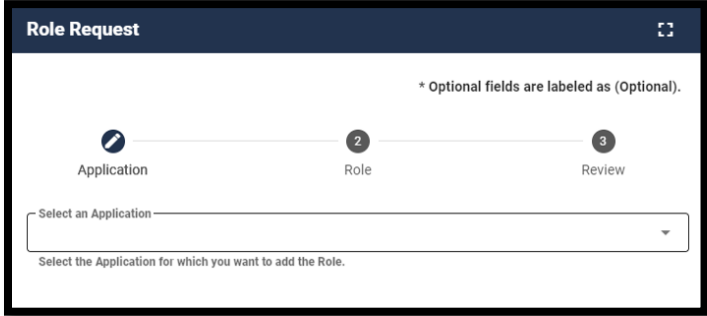**Table 1: Summary of Reports Available to Application BO, BOR, and HD Users**

Report Name	Report Description
User Details Report	This report provides detailed user and role-specific information for IDM Integrated application users.
User Role Approver Report	This report provides information about user role requests for an application, with corresponding details of the approvers who took an action on these requests by either approving or rejecting the request.
Application Summary Report	This report provides a summary of the number of users registered to an application that is integrated with the IDM System. The report also includes the number of IDM account holders that do not have a role in any application.
Annual Role Certification Summary Report	This report displays the total count(s) of all the user roles that are certified, revoked and/or due for Annual Role Certification (ARC) by a single or multiple application.
Pending Annual Role Certification Report	This report displays data about all user roles that are pending or due for annual role certification.
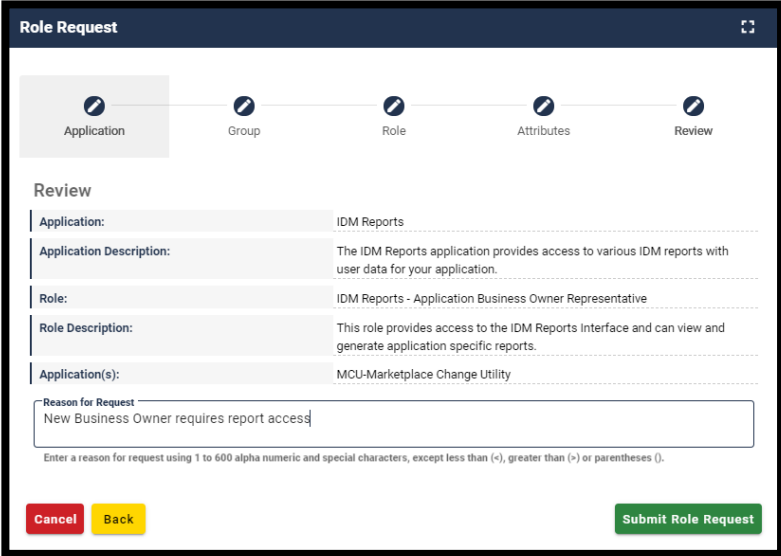
2.   How to Obtain Access to My Reports

Users who require access to My Reports must submit a role request using the following procedure. If you require assistance with the IDM role request process, please refer to IDM User Guide - *How to Request a Role for a New Application*.

Note: Application BO, BOR, and Tier 1 HD users will receive access to a predetermined number of reports based on the specific role that they request. Refer to **Table 1** for a list of those reports.

Procedure	Example
1) Navigate to https://home.idm.cms.gov and sign in to the IDM System.	**Figure 1: IDM Sign In Window**
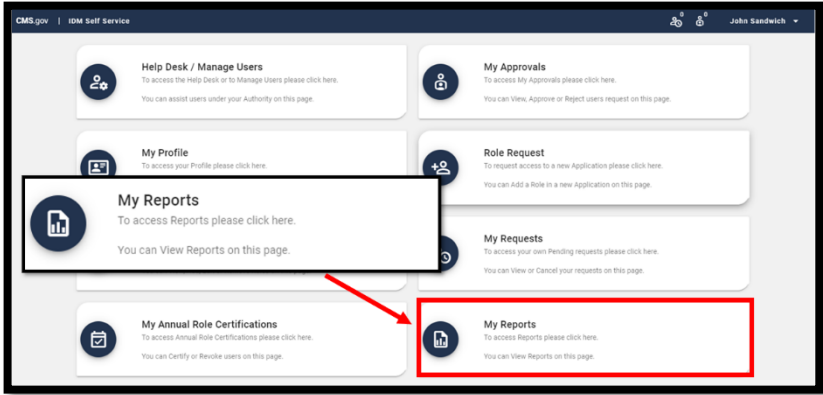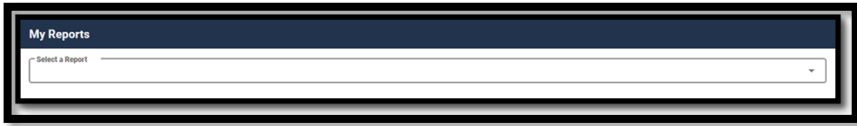
Procedure	Example
The IDM Self Service user interface appears. 2) Click the *Role Request* button.	 **Figure 2: IDM Self Service User Interface**
The Role Request window appears. 3) Select **IDM Reports** using the *Select an Application* menu**.** 4) Complete Remote Identity Proofing (RIDP) if not already completed. 5) Select a Group. 6) Select a Role. 7) Select one or more Applications. 8) Click the *Review Request* button.	 **Figure 3: IDM Role Request Window**

Procedure	Example
9) Enter a justification. 10) Click the **Submit Role Request** button. *The Role Request window displays a Request ID and a message which states that the request was successfully submitted to an approver for action.*	 **Figure 4: IDM Role Request Window**

3. How to Use My Reports

3.1 How to View a Report

Users who are approved for access to My Reports can view the reports that are available for their role using the following procedure.
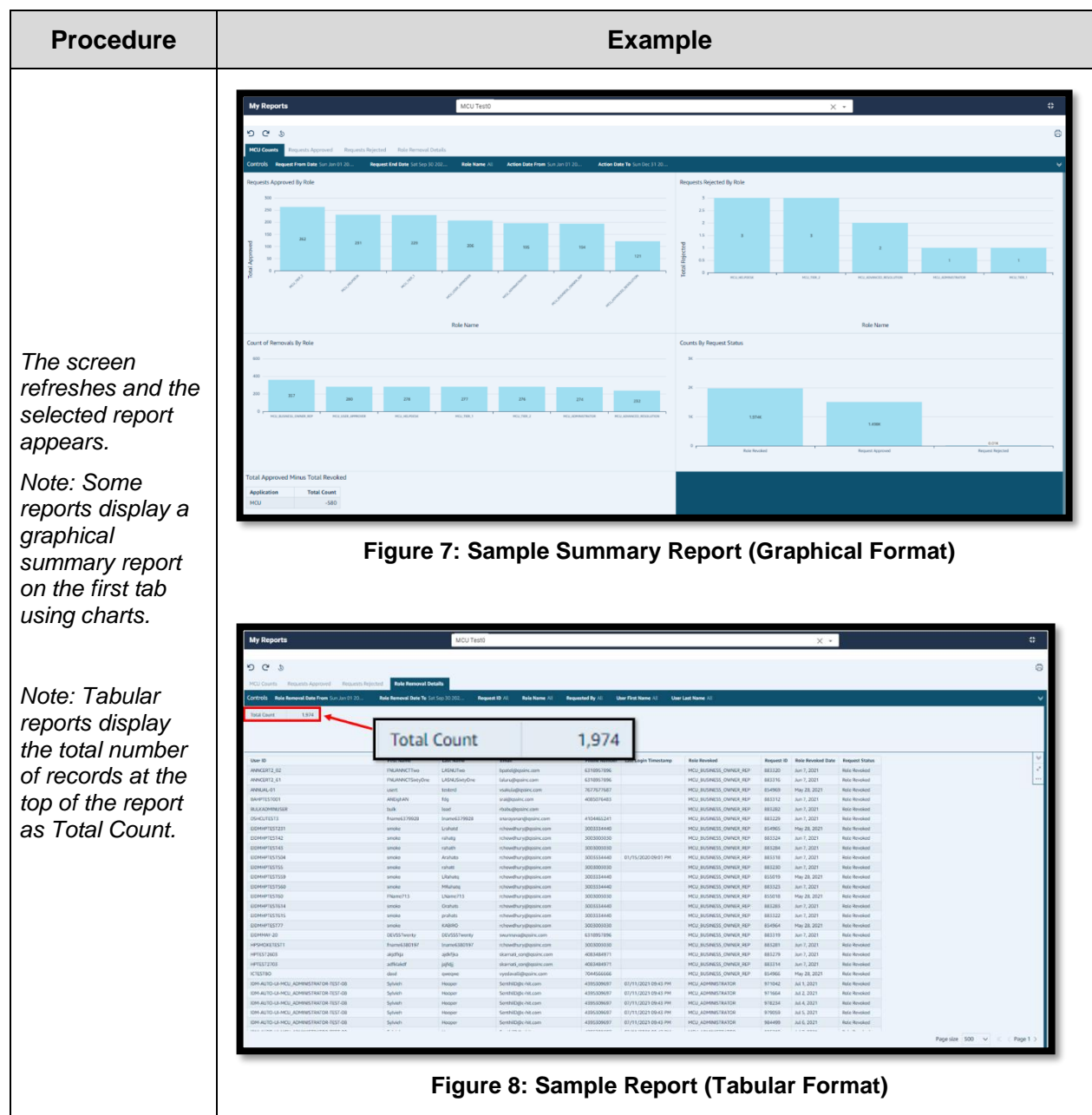
Procedure	Example
Access the IDM Self Service user interface. 1) Click the **My Reports** button.	 **Figure 5: IDM Self Service User Interface**
The My Reports window appears. 2) Select a report from the dropdown.	 **Figure 6: My Reports Selection Window**

Procedure	Example
The screen refreshes and the selected report appears. *Note: Some reports display a graphical summary report on the first tab using charts.* *Note: Tabular reports display the total number of records at the top of the report as Total Count.*	 **Figure 7: Sample Summary Report (Graphical Format)** **Figure 8: Sample Report (Tabular Format)**

3.2   How to Filter, Sort, Paginate, and Print a Report

Table 2 provides a description of each of the controls used to filter, sort, and/or paginate the report.
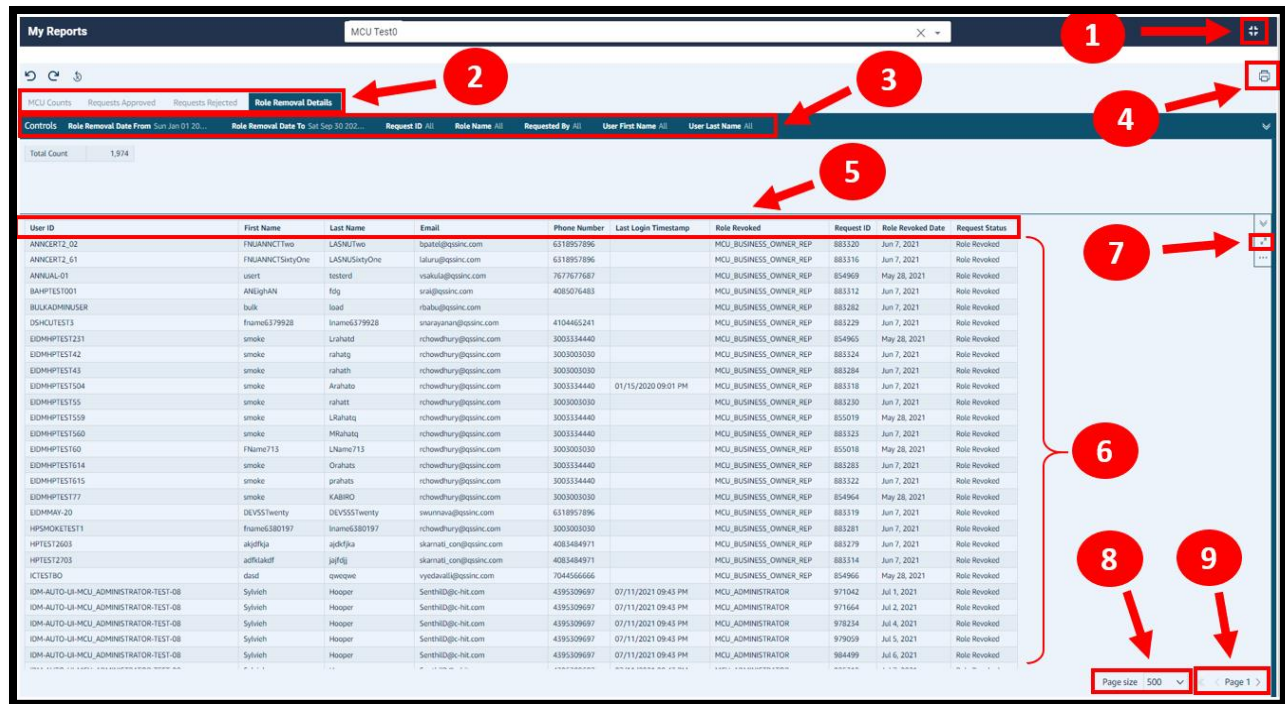
Figure 9: IDM My Reports Window

Table 2: Summary of Filter, Sort, and Pagination Controls

Task	Reference	Action
View Full Screen	1	Click the **Full Screen** button to switch the My Reports window between full screen and normal view.
Select a Report Section	2	Click the **Report Section** button that corresponds to the desired report section if multiple sections are available. For example, an application may have a report that contains sections with information for Requests Approved and Requests Rejected.
Filter Report by Columns	3	Click a **Report Column Filter** controls to filter the report using information in one or more columns limit the number of records that are displayed on the page. *Note: A report may have multiple rows of filters which will only become visible when the user clicks the Report Column Filter controls.*
Print	4	Click the **Printer icon** to print the current page of report information on a printer or create a Portable Document Format (PDF) file. *Note: Both the Print and PDF download options only output the information that is currently visible on the screen. Use the Export function described in **Section 3.4 How to Export a Report as an Excel Spreadsheet** to export and view all of the report data.*

Task	Reference	Action
Sort Report Columns	5	Click a **Column Header** to change the sort order of the report data based on the order of the selected column. *Note: To **change the width of a column** - Position the mouse between two column headers until a double arrow appears, then hold down the left mouse button and drag the column border to the desired width.*
Report Body	6	Click the **Report Body** to display or hide the Minimize/Maximize buttons and the Report Export Options menu.
Minimize/Maximize	7	Click the **Minimize/Maximize** buttons to switch the report body viewing area between minimized and maximized. *Note: The page navigation controls are always visible when the Maximize setting is selected.*
Change Page Size	8	Select **Page Size** to change the number of records that are displayed on a page.
Page Navigation	9	Click the single **Right Arrow** to move to the next page. Click the single **Left Arrow** to move to the previous page. Click the double **Left Arrow** to return to the first page of the report.

3.3   How to Print a Report

Note: The Print option only prints the information that is currently visible on the screen. Use the Export function described in **Section 3.4 How to Export a Report as an Excel Spreadsheet** to export and view all of the report data.
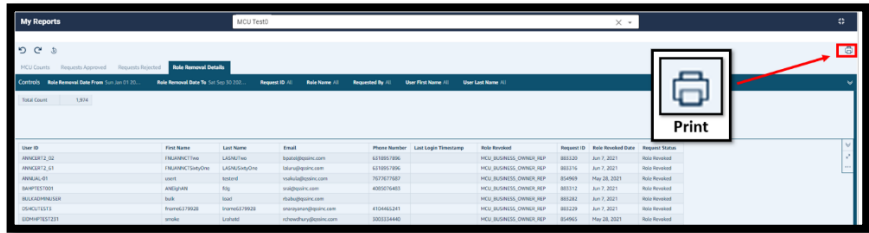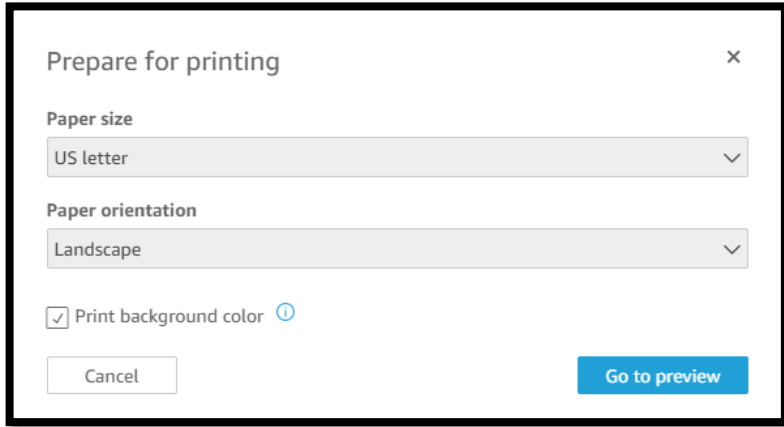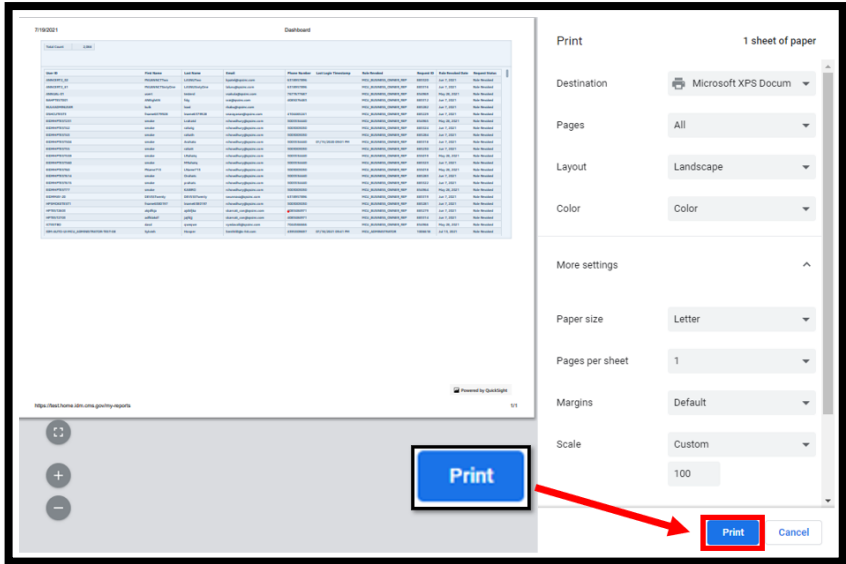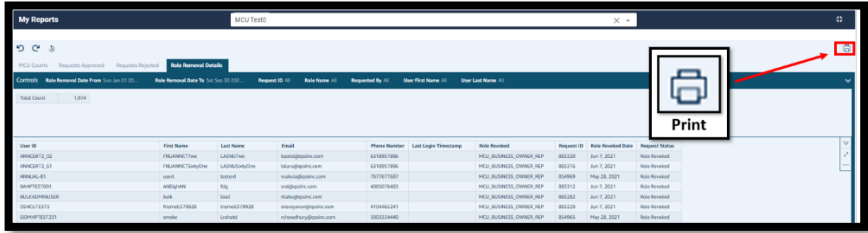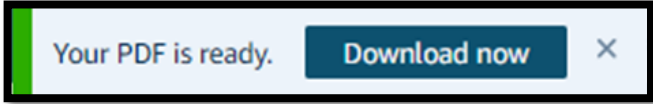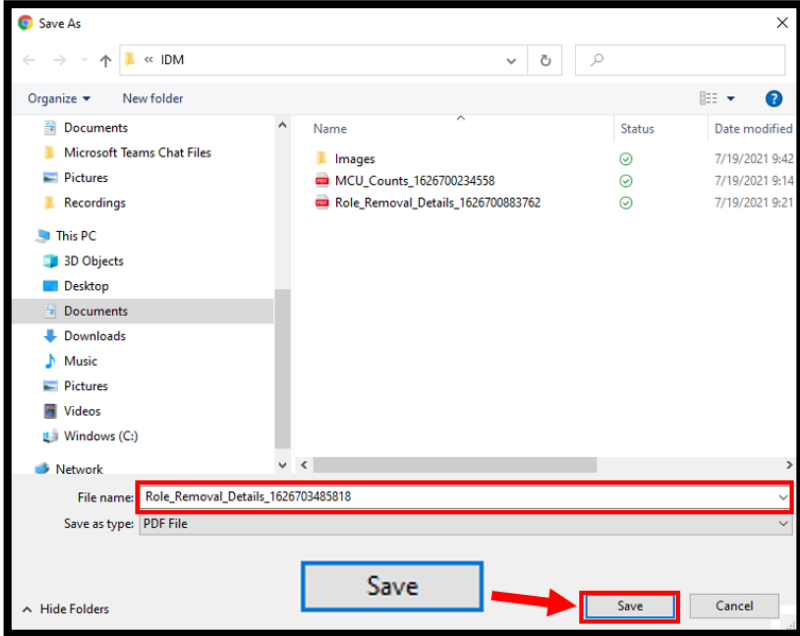
Procedure	Example
1) View the desired IDM Report. 2) (Optional) Apply filters and sort report columns if desired. 3) Click the **Printer** icon and choose the **Print** option.	 **Figure 10: IDM My Reports - Print Button**
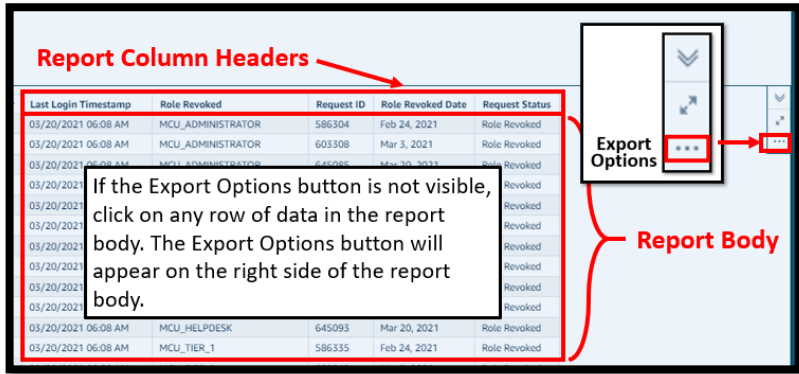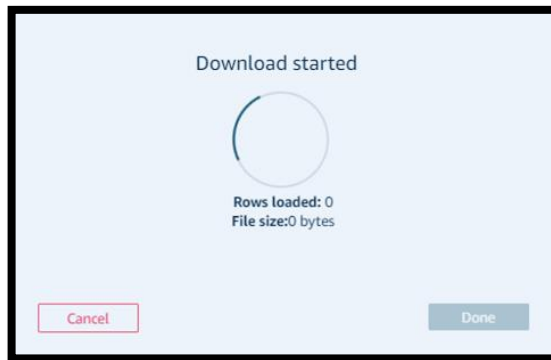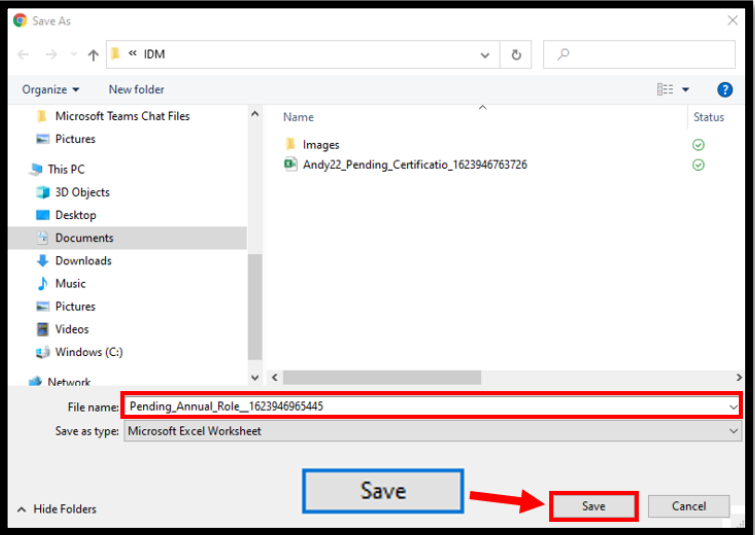
Procedure	Example
The Prepare for Printing window appears. 4) (Optional) Change the **Paper size** and/or the **Paper orientation**. 5) (Optional) Select the **Print background color** option. 6) Click the **Go to preview** button.	 **Figure 11: Prepare for Printing Window**
The Print Preview window appears. 7) (Optional) Select the Destination printer. 8) (Optional) Adjust the page range, layout, and color settings. 9) (Optional) Click the **More Settings** button to adjust the Paper size, Pages per sheet, Margins, and Scale settings. 10) Click the **Print** button.	 **Figure 12: Print Preview Window**

3.3.1   How to Download a Report as a PDF

Procedure	Example
1) View the desired IDM Report. 2) (Optional) Apply filters and sort report columns if desired. 3) Click the **Printer** Icon and choose the **Download as PDF** option.	 **Figure 13: IDM My Reports - Print Button**
The system displays a message that indicates it is working on the PDF. The Download Now button appears when the PDF is ready. 4) Click the **Download now** button.	 **Figure 14: PDF Download Button**
The Save As window appears. 5) Navigate to the location where you would like to save the file. 6) Click the **Save** button.	 **Figure 15: Save As Window**

3.4   How to Export a Report as an Excel Spreadsheet

Procedure	Example
1) View the desired IDM Annual Role Certification Report. 2) (Optional) Apply filters and sort report columns if desired. *Note: The report data will be exported exactly as it is filtered and sorted. Remove all filters if the entire report is needed.* 3) If the Export Options menu is not already visible, click any row of the **Report Body**. 4) Click the **Export Options** button and select the export format. *Note: Reports that contain more than 50,000 records cannot be exported as an Excel file. Reports with more than 50,000 records must be exported as a .csv file.*	 **Figure 16: My Reports Window - Export Options**
The Download Status window appears and displays the progress of the export operation.	 **Figure 17: My Reports Download Status Window**

Procedure	Example
The Save As window appears after the download is complete. 5) Navigate to the location where you would like to save the file. 6) Click the **Save** button. 7) Click the **Done** button on the Download Status window.	 **Figure 18: Save As Window**

Appendix A: Acronyms

Table 3: Acronyms

Acronym	Literal Translation
ARC	Annual Role Certification
API	Application Programming Interface
BO	Business Owner
BOR	Business Owner Representative
C-HIT	Chags Health Information Technology
CMS	Centers for Medicare & Medicaid Services
CSV	Comma Separated Value
EIDM	Enterprise Identity Management
HD	Helpdesk
IDM	Identity Management
LOA	Level of Assurance
PDF	Portable Document Format
QA	Quality Assurance
RIDP	Remote Identity Proofing
UI	User Interface

Appendix B: Approvals

The undersigned acknowledge that they have reviewed this document and agree with the information presented within this document. Changes to this document will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 4: Approvals

Document Approved By	Date Approved
Carla Layne, EIDM Contracting Officer Representative, CMS	Date
Verne Webster, EIDM Government Task Leader, CMS	Date
Charles Lall, IDM Project Manager, C-HIT	Date
Micalina Mendoza, IDM QA Manager, C-HIT	Date