IdentityIQ Rapid Setup

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Getting Started

Rapid Setup provides a business user friendly interface that enables you to take advantage of pre-configured, best practice use cases to onboard applications, and reduce deployment time. Setting up applications can require custom coding and converting business processes to workflows, which can be quite time consuming. Rapid Setup removes the complexity of implementation by providing a guided experience for even non-technical users.

For more overview information see:

- Rapid Setup Joiner Overview
- Rapid Setup Mover Overview
- Rapid Setup Leaver Overview

To configure Rapid Setup, see Rapid Setup Configuration.

Rapid Setup Joiner Overview

Enable the Joiner process to define the operations that are launched when a new user joins your organization.

These can include:

- Builds a provisioning plan which includes:
- Assignment of birthright roles which have an assignment rule matching the identity.
- For each application which has enabled account-only provisioning, create a new account on the application (if none exists yet) if identity meets account-only creation criteria.
- Executing the provisioning plan. By default, the "LCM Provisioning" workflow is used to execute the plan.
- Notifying the manager with results of the provisioning.
- Optionally notifies the manager when a temporary password is generated.
- Running an optional post-joiner rule.

Rapid Setup Mover Overview

Enable the Mover process to define the operations that are launched when a user moves within your organization.

These can include:

- Performing a certification on the moving identity. Application can choose whether or not to certify their additional entitlements.

    - Global setting available to skip certifications during mover.
    - Perform a joiner-type provisioning on the moving identity. Birthright roles will always be assigned/removed as appropriate. Applications can choose whether or not to perform account-only provisioning during move.

- Global setting available to skip joiner-type provisioning.
- Running an optional post-mover rule.

Rapid Setup Leaver Overview

Enable the Leaver process to define the operations that are launched when someone leaves your organization.

These can include:

- Reassigning the owner of objects currently owned by the leaving identity.
- Notifying the manager of the leaving identity about the reassigned object.
- Reassign of administrator of identities currently administered by the leaving identity.
- Notify the manager of the leaving identity about the re-administered identities.
- Auto-reject requests targeted for the leaving identity.

- Builds immediate provisioning plan:

  - Removal of the identity's IIQ roles

  - For each application on which identity has an account, and leaver is enabled. The RapidSetup configuration for each application declares which of the below actions to perform, and the timing of whether to perform immediate or deferred:

    - removal of the identity's entitlements (unless excluded from removal)
    - scrambling the identity's password on application
    - adding a comment to an account attribute
    - moving account to a different OU on a container-based application
    - disabling account
    - deleting account

- Executing the immediate provisioning plan. By default, the "LCM Provisioning" workflow is used to execute the plan.
- Notifying the manager with results of the immediate provisioning.
- Updating links which may need updating due to a move.
- Running an optional post-leaver rule.9

Rapid Setup Configuration

After you activate Rapid Setup, you can configure it to meet the needs of your organization. A user can configure various workflows depending on needs surrounding the organizations identities.

To configure Rapid Setup, navigate to the **Gear Icon > Global Settings > Rapid Setup Configuration.**
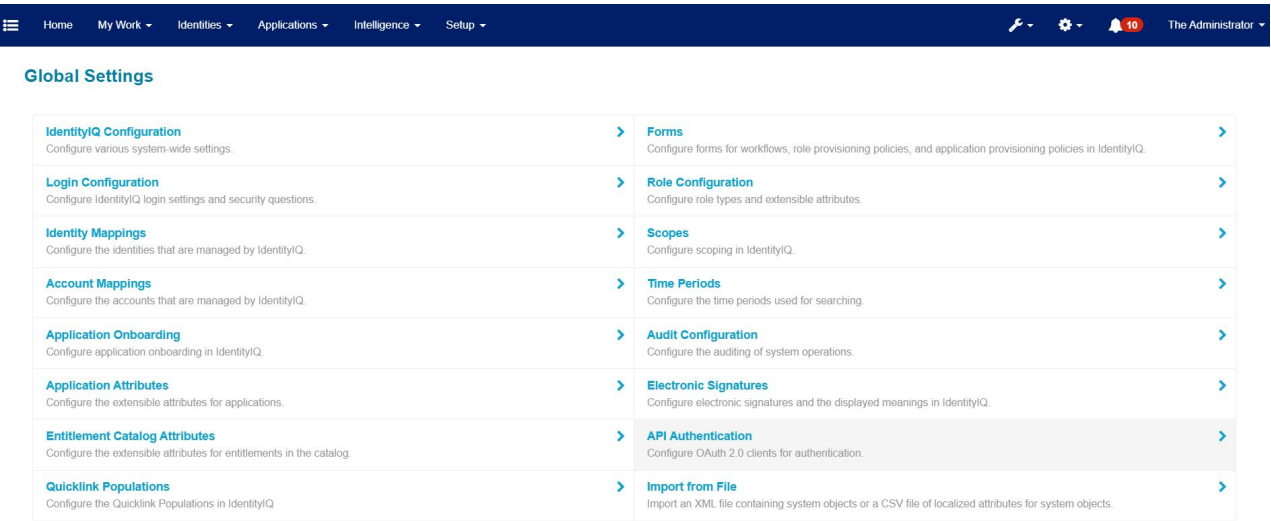
The Rapid Setup Configuration has tabs that can be customized to meet your organizations needs. The following tabs are available for configuration:

- Joiner
- Mover
- Leaver
- Identity Operations

> Note: Information pertaining to Identity Operations can be found in "Terminate Identity" on page 17 of this guide.

- Miscellaneous

When a process is enabled, a dot will display with the tab title. The blue dot signifies that changes were made on the page and were not saved. Remember to save selected options once done.

Joiner

If a new identity is coming into the organization, configure a joiner workflow for that joining identity.

Enable Joiner processing displays the following:

Identity Selection	Description
Generate Approvals	Select if the workflow should have approvals.
Automatically Join New Empty Identities	Perform joiner processing on new identities which have no accounts.
Exclude Uncorrelated Identities	Default set to True. For an identity to be correlated, it has to come from an authoritative application.
Alternative Workgroup for Joiner Completed Notification Email	Send notification to this email rather than the manager of the joining identity.
Joiner Completed Notification Email Template	Specify the template to use for notification emails.
Send Temporary Password Email	If enabled, send an email notification with temporary password info to the newly created joining identity's manager.
Post Joiner Rule	Specify a user rule to use after running a Joiner workflow.
Threshold Type	Choose from Fixed or Percentage.
Threshold	Enter a desired value.
Joiner Business Process	Specify which business process workflow is executed during the Joiner process.

Identity Selection	Description
Identity Trigger	Defines an identity change condition and the joiner action to perform.

Mover

If an identity is moving job functions, configure a mover workflow for that moving identity.

Enable Mover processingdisplays the following:

Identity Selection	Description
Generate Approvals	Select if the workflow should have approvals.
Launch a Mover Certification	Launch a certification campaign during the Mover process.
Stage the Certification	Stage the certification. Refer to the Phases of a Certification information in the certification and access review documentaton.
Include Birthright Roles	Include birthright roles that were previously assigned to this user in the certification.
Certification Owner	The owner of the defined certification.
Backup Certifier	Select an alternate identity to receive the access review created by this certification if the original owner is unable to certify.
Include Previous Manager as a Certifier	Assign an access review to the identities previous manager.
Joiner Processing	Run the Joiner process as part of the Mover process to perform the basic access assignment.
Post Mover Rule	Specify a rule to use after running a Mover workflow.
Threshold Type	Choose from Fixed or Percentage
Threshold	Enter a desired value.
Mover Business Process	Select the business process workflow executed during the Mover process.
Trigger Filter	Defines an identity change condition and the mover action to perform.

Leaver

If an identity is leaving the organization, configure the leaver workflow for that leaving identity.

Enable Leaver processing displays the following:

Identity Selection	Description
Generate Approvals	Select if the workflow should have approvals.

Identity Selection	Description
Exclude Uncorrelated Identities	Default set to True. For an identity to be correlated, it has to come from an authoritative application.
Remove Assigned Roles	Remove assigned roles from an identity during Leaver processing.
Reassign Artifacts	Reassign objects owned by a leaving user. Select the reassignment objects from the drop-down list. Multiple objects can be selected.
Reassignment Artifacts Types	Specify which object types should have the owner attribute reassigned if the current owner is the leaving identity.
Reassign Artifacts to Manager	Reassign objects to the manager of the leaving identity.
Reassign Artifacts Rule	Handle reassignment of object using this rule.
Reassign Artifacts Alternate	Reassign objects to this identity if none were discovered for manager or by the reassignment rule.
Reassign Identities	Reassign any identities, of type rpa or service, administered by a leaving identity.
Reassign Identities to Manager	Reassign the identities to the manager of the leaving identity.
Reassign Identities Rule	Handle reassignment of managed identities using this rule.
Reassign Identities Alternate	Reassign managed identities to this identity if none were discovered for manager or by the reassignment rule.
Send Leaver Notification to this Workgroup	Select a workgroup to receive Leaver notification emails rather than a manager.
Ownership Reassignment Notification Email Template	Email template to compose the email notification regarding reassignments (used for both artifact and identity reassignment).
Leaver Completed Notification Email Template	Specify the template to use for notification emails.
Post Leaver Rule	Specify a rule to use after running a Leaver workflow.
Threshold Type	Choose from Fixed or Percentage.
Threshold	Enter a desired value.
Leaver Business Process	Select the business process workflow executed during the Mover process.
Trigger Filter	Defines an identity change condition and the leaver action to perform.

Miscellaneous

The following options display within Miscellaneous:

Identity Selection	Description
Business Process Requester	Select an identity to use as the requester for RapidSetup lifecycle workflows.
Alternative Workgroup for Rapid Setup Notification	Select a workgroup to receive emails. By default, No Manager is an empty workgroup. Add people to this workgroup or select a different one.
Workgroup to Receive Error Notifications Email	Select a workgroup to be notified of errors by email. By default, Rapid Setup Error Notification is a stand-in. Review and update if desired.
Notification Style Sheet Email Template	Select a style sheet for emails.
Notification Header Email Template	Select an email header template.
Notification Footer Email Template	Select an email footer template.
Role Types to treat as Rapid Setup Birthright Roles	Select a role type with Birthrights.

Identity Operations

If an identity is terminated from the organization, configure the identity operations workflow for that terminated identity.

Enable Terminate processing to display the following:

Options	Description
Generate Approvals	Select if the workflow should have approvals.
Terminate Business Process	Select the business process workflow executed during the Mover process.
Remove Assigned Roles	Remove assigned roles from an identity during Terminate processing.
Reassign Artifacts	Reassign objects owned by a terminated user. Select the reassignment objects from the drop-down list. Multiple objects can be selected.
Reassignment Artifacts Types	Specify which object types should have the owner attribute reassigned if the current owner is the leaving identity.
Reassign Artifacts to Manager	Reassign objects to the manager of the terminated identity.

Options	Description
Reassign Artifacts Rule	Handle reassignment of object using this rule.
Reassign Artifacts Alternative	Handle reassignment of managed identities using this rule.
Reassign Identities Alternative	Reassign objects to this identity if none were discovered for manager or by the reassignment rule.
Reassign the Identity	Reassign any identities, of type rpa or service, administered by a leaving identity.
Reassign Identities to Manager	Reassign the identities to the manager of the leaving identity.
Reassign Identities Rule	Handle reassignment of managed identities using this rule.
Reassign Identities Alternative	Reassign managed identities to this identity if none were discovered for manager or by the reassignment rule.
Send Terminate Notification to this Workgroup	Select a workgroup to receive Terminate notification emails rather than a manager.
Ownership Reassignment Notification Email Template	Email template to compose the email notification regarding reassignments (used for both artifact and identity reassignment).
Terminate Completed Notification Email Template	Specify the template to use for notification emails.
Post Terminate Rule	Specify a rule to run after the Terminate Business Process completes.

Defining Identity Triggers

Identity triggers are the core of what drives joiner, mover, leaver within Rapid Setup. Trigger Filters are the constraint logic that is applied to the identities to determine or control which identities will participate in the joiner, mover, leaver workflows.

This filter is created using the new query builder in the Rapid Setup Configuration page and applies to all applications using Rapid Setup.

Aggregation

Review this section before configuring aggregation using Rapid Setup. While Rapid Setup does not introduce new aggregation function, it approaches it in a slightly different manner.

For detailed information about aggregation in IdentityIQ, refer to the system administration documentation.

Account Disabled / Account Locked

Account Disable and Lock filter only display for applications that do not support Disabled/Locked.

- An Account can be Disabled/Locked with an Aggregation Customization Rule.
- Filters defined here take precedence over aggregation customization rules defined elsewhere in IdentityIQ.
- If the Account Disable or Account Lock filters match an account during aggregation, then the account will be marked in IdentityIQ as disabled or locked, respectively.

Identity / Manager Correlation

Identity and Manager Correlations are configurations to support matching an account to an identity and matching an identity to its manager. These configurations are available on the Application Definition page but are surfaced here. More than one filter cannot be created or displayed in the Rapid Setup user interface.

- Filters created display in the Application Definition, and changes to the filter in the Application Definition display here.
- Create more than one filter in the Application Definition displays a warning in the Rapid Setup user interface.

Service Account and RPA Accounts

More than one filter cannot be created in the Rapid Setup user interface.

- When the Service Account filter is true, the identity attribute Type is set to Service Account, and the Application attribute Identity_Type is set to Service.
- When the RPA Account filter is true, the identity attribute Type is set to RPA/BOTS, and the Application attribute Identity_Type is set to RPA.
- When the Service Account filter and RPA Account filter are both true for the same identity, the Identity_Type will be set to Service Accounts.
- When the Service Account filter is deleted, and the RPA Account filter is created, the Identity_Type is set to RPA.

Using Rapid Setup

The Rapid Setup application is where the business user functions reside. Full access to Rapid Setup allows the user to access the Rapid Setup page with edit privileges.
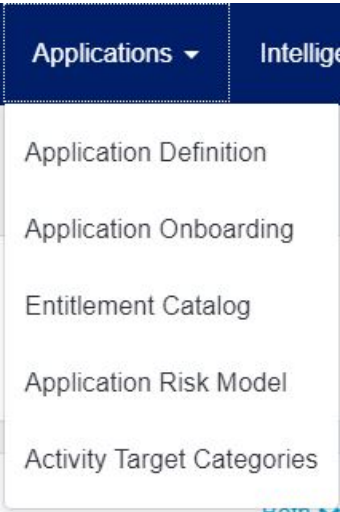
Joiner

Though populations, birthright roles, and provisioning policies do not have to be created at this point, for features within joiner to work effectively, the user is advised to create them before configuring Joiner.

> The Leaver event has priority over Joiner. If an identity is eligible for Leaver event, the Joiner event will not be kicked off.

Identity Selection	Description
Perform Account-Only provisioning	Enable provisioning to be performed on the account only.
Identity Selection	Identity Selection has the following five possible options to select: • Everyone – Select **Everyone** if all identities should be provisioned for an account only. Otherwise, choose a method for selecting identities. • Filter – Enter the Filter XML into the dialog. • Script – Enter the beanshell source into the dialog. • Rule – Two options are available to select. Either the **Cert Event Trigger Rule** or the **Policy Violation Owner Rule**. Population – Two options are available to select. Either the **High Risk Tokyo Inv Managers** or the **RapidSetup Correlated Identities**.
Send application's newly-created iden-	During aggregation, if a new identity is created, then during creation set its attribute **rapidSetupProcessingState** to the value **Needed**.

Identity Selection	Description
tities to Joiner	
Joiner Email Instructions	If a string is present, expand it. The expanded string (for each application) will be added to the end of the Joiner Completed Notification email to the manager.
Joiner Email Password Instructions	If a string is present, expand it. The expanded string (for each application) will be added to the end of the Joiner Temporary Password Notification email to the manager. This is typically used to inform the manager of the temporary user of an account.

The Leaver event has priority over Joiner. If an identity is eligible for Leaver event, the Joiner event will not be kicked off.

Mover

Verify role/entitlements are set up properly with display names, and descriptions before this feature is configured.

The only option for the user under Mover is to perform a certification. Toggle the option to turn on.

The Joiner and Leaver events have priority over Mover. If an identity is eligible for Joiner or Leaver events, the Mover event will not be kicked off.

Leaver

Verify delete/disable/unlock account provisioning polices and password policy for scrambling option are created before this feature is configured.

The Leaver feature gives the user the option to configure the leaver plan by either using a rule or by selecting options to create a deletion plan.

1. If using a rule, select the **Use Rule** option and enter in the desired rule.
2. If deleting the account as a whole, select **Delete Account**.
3. When Delete Account is selected, time options become available. Click either **Now** or **Later**. If Later is selected, enter the numerical numbers of days before the account is deleted.
4. If you are configuring the Leaver plan, the following are options are available:

Identity Selection	Description
Disable Account	Send a request to disable the account. You can set this option for now or later in the future.
Scramble Password	Scramble the value of the specified account attribute. Only useful when the application doesn't natively perform password maintenance. You can set this option for now or later in the future.
Move Account	Only useful for Active Directory. Enter the full OU to where to the user should be moved to during Leaver. You can set this option for now or later in the future.

Identity Selection	Description
Remove Entitlements	You can set this option for now or later in the future. When selecting this option, **Entitlement Exceptions** will display at the bottom of the screen. Here, enter a filter string for creating an entitlement exception.
Add Comment	Additional information may be added if needed.

No other event has priority over Leaver. If an identity is eligible for Leaver event, the Leaver event will be kicked off.

Terminate Identity

Rapid Setup includes a feature that enables you to immediately terminate access for an identity without approvals. This is done by immediately processing the Leaver workflow.

The Terminate Identity option process is initiated from the Identity Operations page. See the Terminate Identity section for more information.

Terminate Identity Procedure

Complete the following steps to terminate an identity.

1. Navigate to **Identities>Identity Operations**.

2. Select the identity to terminate. Only one identity can be selected at a time.

   > You can use the Search field to find the identity you are looking for or use filters to limit the identities displayed.

3. Choose **Terminate**.
4. The Reason field is displayed and is required. Enter the reason for the termination and click Next.
5. Confirm the identity and click Terminate.