# Ent South SE – Workflow Battle Royal – Succession Management Implementation Guide

## Workflow Import

1. Log into your IDN tenant with administrative privileges and navigate to the “Admin” tab
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2. Select the “Workflows” sub menu item, and then click the “+ New Workflow” button
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3. Select the “Start with a JSON File” option by selecting the “Upload File” button within the section
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4. Drag and drop, or click to select the first of the JSON files provided.
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5. You may choose to rename the workflow and add a description before continuing by clicking the “Continue to Builder” button
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6. You will find yourself at the screen below. We will come back to this later, but at this point we will click the “Back” link to return to the main Workflows page
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7. Repeat steps 2-6 for all remaining JSON files provided

## Configuration

1. For each of the Sub Workflows perform the following steps:
   1. Select the “External Trigger” generate a new access token by clicking the “+ New Access Token” button – NOTE: Please store this safely as it is not recoverable. Loss of this information will result in a need to regenerate the token
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   2. For the indicated actions, populate your tenant api url information and oauth information. Ensure you select “Header” as the Credential Location
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   3. Select the “Send Email” action and update to reflect your organizations desired configuration
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2. Open the workflow named “Main SM Workflow” in the Workflow Builder
3. If desired, replace the workflow trigger with one specific to your needs
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4. Update the form action to reflect the form you created following the form creation guidelines provided separately
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5. Update the authentication information for the “Find Source Identity Manager” action. NOTE: Ensure you select “Header” as the location for the Credential Location
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6. Repeat the previous step for the identified actions in the screenshot below
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7. Configure the “Send Mgr Email (Work Reassignment)” action to reflect your desired configuration
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8. For each defined section select the named action and update the authentication and URL information with the matching information gathered earlier. Please ensure that the named section, credentials, and sub workflow all correlate.
9. Done!

Please reach out to nate.jackson@sailpoint .com if you encounter any issues or have constructive feedback to share. Thank you!