



SSF Tools: Workgroup Migrator User Guide

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Introduction

The migration of IdentityIQ workgroups between environments can sometimes be problematic. The object type used for workgroups is the Identity object, and these objects are not usually part of the build process that is used to migrate. While it is possible to export workgroups and add them to the build, the workgroup memberships will not be migrated as part of this process because the memberships are stored on the individual identities rather than the workgroups.

The Workgroup Migrator aims to address this issue. It provides two tasks:

- Workgroup Exporter task
- Workgroup Importer task

Workgroups, including their properties and memberships, can be easily exported to a file from one environment with the first of these tasks, and imported to another with the second task.

Installation

The Workgroup Migrator ships with the SSD and is deployed by default as part of the build. Deployment of the Task Definitions used by the tool can be switched on or off by use of the “deployWorkgroupMigrator” property in the build.properties file. Set this to “true” to enable deployment, or “false” to disable.

Components

The tool includes two TaskDefinition objects:

- config/SSF_Tools/WorkgroupMigrator/Source/TaskDefinition/TaskDefinition_WorkgroupExporter.xml
- config/SSF_Tools/WorkgroupMigrator/Source/TaskDefinition/TaskDefinition_WorkgroupImporter.xml

In addition there are two Java classes for the Task Executors. After compilation by the build process the classes can be found here:

- WEB-INF/classes/sailpoint/services/standard/task/WorkgroupExporter.class
- WEB-INF/classes/sailpoint/services/standard/task/WorkgroupImporter.class

How to Use the Workgroup Migrator

In order to use the tasks it is necessary to create new instances of them from the template Task Definitions. To do this, go to Setup -> Tasks (or Monitor -> Tasks in versions of IdentityIQ earlier than 6.4). Click “New Task” and create new task instances for “Workgroup Exporter” and “Workgroup Importer”.

Workgroup Exporter

Configure the Exporter task in the environment from which you wish to export workgroups. The screenshot below shows the task details:

New Task

Standard Properties
*Indicates a required field.

Name* **Previous Result Action**

Description

Allow Concurrency ☐

Require Signoff ☐

Email Task Alerts

Email Notification

Workgroup Exporter Options

Export file*

The task has a single setting that must be configured:

Name	Description
Export file	The full path to the file that will be exported (on the application server or shared storage).

After setting this value, save and execute the task to export the workgroup file. When the task has finished executing the Task Result will display the number of workgroups that were exported.

The resulting export file will be a CSV file with fields for workgroup name, workgroup description, members, owner, capabilities, email and notification option. The file includes a header. An example of an export file is given below:

```
Workgroup Name,Workgroup Description,Members,Owner,Capabilities,Email,Notification Option
Auditors,Workgroup for Audit team,"Steve.Rice,Jo.Smith",Andrew.Gray,Auditor,auditors@example.com,GroupEmailOnly
Compliance Officers,,"Karen.Hall, Harold.Patterson, Tracy.Meyer",Todd.Olson,ComplianceOfficer,,MembersOnly
ERP Owners,ERP admins,"Patricia.Jones, Amanda.Ross, Lori.Ferguson",al.jones,,ERPappowners@example.com,Disabled
Application Admins,Members can administer applications,"Ian.Black,
Gary.Stewart",Antonio.Franklin,ApplicationAdministrator,appadmins@example.com,Both
```

Workgroup Importer

Configure the Importer task in the environment in which you wish to import workgroup data from the export file. The screenshot below shows the task details:

New Task

Standard Properties
*Indicates a required field.
Name* Import Workgroups
Description Import workgroups and their memberships
Allow Concurrency ☐
Require Signoff ☐
Email Task Alerts
Email Notification Disabled

Workgroup Importer Options

Import file*	D:\Export\workgroups.csv
Modify existing workgroups only - do not create new ones	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup memberships	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup descriptions	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup capabilities	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup owners	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup email addresses	<input checked="" type="checkbox"/> <input type="checkbox"/>
Do not import workgroup notification option	<input checked="" type="checkbox"/> <input type="checkbox"/>

Save **Save and Execute** **Cancel** **Refresh**

The task has seven configuration options:

Name	Description
Import file	The full path to the file that will be imported (on the application server or shared storage).
Modify existing workgroups only - do not create new ones	If enabled, the task will only update workgroups that already exist. No new workgroups will be created.
Do not import workgroup memberships	If enabled, workgroup memberships from the import file will be ignored. Any existing workgroup memberships will remain.
Do not import workgroup descriptions	If enabled, the descriptions from the import file will be ignored.
Do not import workgroup capabilities	If enabled, the capabilities from the import file will be ignored.
Do not import workgroup owners	If enabled, the workgroup owners from the import file will be ignored.
Do not import workgroup email addresses	If enabled, the email addresses from the import file will be ignored.
Do not import workgroup notification option	If enabled, the workgroup notification options from the import file will be ignored.

After setting these values, save and execute the task to import the workgroup file. When the task has finished executing the Task Result will display the total number of workgroups processed along with the

numbers of workgroups updated, workgroups created, workgroups ignored and workgroup members not found (listing their names). Note that the number of workgroups ignored will only have a value if the “Modify existing workgroups only” is enabled and there are workgroups in the import file that do not already exist.

If the “Do not import workgroup memberships” option is not enabled, workgroup memberships will be replaced with the members listed in the record in the file; any existing members that are not in the list will have their membership removed. No workgroup memberships will be added or removed if the “Do not import workgroup memberships” option is enabled.