



SSF Tools: Manual Correlation Migrator User Guide

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Introduction

When deploying IdentityIQ across multiple environments it is often the lower environments (such as development and UAT environments) that are used for initial analysis of identity and account data. Customers frequently want to get started on the process of manually correlating accounts that cannot easily be matched using correlation logic, before the data is available in the production environment. IdentityIQ provides an interface in the UI for manual correlation of these accounts, but there is no out-of-the-box utility that can be used to migrate these manual correlations between environments, resulting in the need to perform the same time-consuming steps to do the manual correlations in the higher environments. This can be a particular problem if there are large numbers of uncorrelated accounts.

Sometimes customers already have lists of accounts that should be associated with specific identities but are unable to automate the matching of these accounts and identities using correlation logic due to lack of common matching attributes or because account naming conventions are not always followed. It is common for the customer to request an import function that will automate the correlation of accounts in these lists.

The Manual Correlation Migrator aims to address both of these issues. It provides two tasks:

- Manual Correlation Exporter task
- Manual Correlation Importer task

Correlation data can be easily exported to a file from one environment with the first of these tasks (for selected applications or all), and imported to another with the second task.

Installation

The Manual Correlation 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 “deployCorrelationMigrator” 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/CorrelationMigrator/Source/TaskDefinition/TaskDefinition_ManualCorrelationExporter.xml
- config/SSF_Tools/CorrelationMigrator/Source/TaskDefinition/TaskDefinition_ManualCorrelationImporter.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/ManualCorrelationExporter.class
- WEB-INF/classes/sailpoint/services/standard/task/ManualCorrelationImporter.class

How to Use the Manual Correlation 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 “Manual Correlation Exporter” and “Manual Correlation Importer”.

Manual Correlation Exporter

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

New Task

Standard Properties

*Indicates a required field.

Name*

Description

Allow Concurrency ☐

Require Signoff ☐

Email Task Alerts

Email Notification

Previous Result Action

Manual Correlation Exporter Options

Export file*

Applications (leave blank for all)

- Active_Directory
- ERP_Global
- Oracle_DB_oasis

The task has the following settings 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).
Applications	A multi-select list of applications for which manual correlations will be exported. Leave this blank to export correlations for all applications.

After setting these values, save and execute the task to export the correlation file. When the task has finished executing the Task Result will display the number of accounts that were exported.

The resulting export file will be a CSV file with fields for application, account name and identity, including a header. An example of an export file is given below:

```
Application,AccountName,Identity
ERP_Global,DanLewis,Daniel.Lewis
ERP_Global,PTaylor,Peter.Taylor
Oracle_DB_oasis,DannyLewis,Daniel.Lewis
Oracle_DB_oasis,DebCollins,Deborah.Collins
Oracle_DB_oasis,AngieBell,Angela.Bell
```

In this case we can see that the application ERP_Global has two manually correlated accounts, and Oracle_DB_oasis has three. The account name in the middle column is the unique “nativeIdentity” of the account (the “Identity Attribute” defined in the application schema). The third column is the name property of the identity that the account is manually correlated to.

Manual Correlation Importer

Configure the Importer task in the environment in which you wish to import correlation data. The screenshot below shows the task details:



New Task

Standard Properties
*Indicates a required field.
Name* Import Correlations
Description Import manual correlations
Allow Concurrency ☐
Require Signoff ☐
Email Task Alerts
Email Notification Disabled

Manual Correlation Importer Options
Import file* D:\Exports\correlations.csv

Save Save and Execute Cancel Refresh

The task has a single setting that must be configured:

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

After setting this value, save and execute the task to import the correlation file. When the task has finished executing the Task Result will display the numbers of accounts correlated, accounts that were already correlated, accounts that were not found and identities that were not found.

It is also possible to use the Importer task as a way of importing an existing or manually created list of correlations. Ensure the import file is in the correct format described above. The AccountName column can contain either the “nativeIdentity” or the “displayName” property of the account link (the “Identity Attribute” or “Display Attribute” defined in the application schema).