



# **SSF Tools: IdentityIQ Summarizer User Guide**

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## Document Revision History

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Revision Date	Written/Edited By	Comments
July 2018	Paul Wheeler	Initial release with SSD v6.

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## Table of Contents

Introduction .....	4
Installation.....	4
Components.....	4
How to Use the IdentityIQ Summarizer.....	5

## Introduction

The IdentityIQ Summarizer is a task that produces a summary of the configuration of a number of object types that are typically part of an IdentityIQ deployment. The summary is in the form of an Excel spreadsheet. It requires IdentityIQ 7.0 or greater.

## Installation

The IdentityIQ Summarizer task ships with the SSD and is deployed by default as part of the build process. Deployment of the Task Definition used by the tool can be switched on or off with the “deploySummarizer” property in the build.properties file. Set this to “true” to enable deployment, or “false” to disable.

## Components

The tool includes a TaskDefinition object:

- config/SSF\_Tools/IdentityIQSummarizer/Source/TaskDefinition/IdentityIQ\_Summarizer.xml

There is a Java class for the Task Executor. The source code for the task can be found in this location in the SSD file structure:

- src/sailpoint/services/standard/task/IdentityIQSummarizer.java

After compilation by the build process, the Java class can be found here:

- WEB-INF/classes/sailpoint/services/standard/task/IdentityIQSummarizer.class

There are also five third-party libraries required by this task, located in the web/WEB-INF/lib folder in the SSD:

- commons-collections4-4.1.jar
- poi-3.17.jar
- poi-ooxml-3.17.jar
- poi-ooxml-schemas-3.17.jar
- xmlbeans-2.6.0.jar

# How to Use the IdentityIQ Summarizer

To use the task, it is necessary to create an instance of it from the template TaskDefinition. To do this, go to **Setup -> Tasks**, click **New Task** and choose **IdentityIQ Summarizer**.

The screenshot below shows the task details:

## New Task

### Standard Properties

\*Indicates a required field.

Name

Previous Result Action

[Rename Old](#)

Description

Allow Concurrency ☐

Require Signoff ☐

Host

Number of Runs

Average Run Time

[Reset Run Statistics](#)

### Email Task Alerts

Email Notification

### IdentityIQ Summarizer Options

Output Excel File Path

[Save](#)

[Save and Execute](#)

[Cancel](#)

[Refresh](#)

Provide a name for your task instance, set the path to the output Excel file, then save execute the task. The Excel file will be created in the location you provided, with a worksheet for each object type.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Bundle Name	Bundle Type	Bundle Status	Bundle Description	Bundle Created	Bundle Modified	Bundle Applicant	Bundle Owner	Bundle Requirements	Bundle Inheritance						
2	Windows Administrator	business	Enabled	Provides strategy setting, planning, supervision, technical, and administrative support.	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:46 BST	Jane.Grant	Windows Administrator - IT	Information Technology	Information Technology						
3	Unix Administrator	business	Enabled	Installs, supports, maintains, monitors, and tunes operating system software and hardware.	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:47 BST	Jane.Grant	Unix Administrator - IT	Information Technology	Information Technology						
4	Treasury Manager	business	Enabled	Manages the corporate finances and treasury activities. Acts as custodian of funds and	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:41 BST	Lori.Ferguson	Treasury Manager - IT	Treasury Analyst	Treasury Analyst	Treasury Analyst	Treasury Analyst	Treasury Analyst	Treasury Analyst	Treasury Analyst	Treasury Analyst
5	Treasury Hedging Specialist	business	Enabled	Assist treasury managers in analyzing the effectiveness of derivatives as hedging instr	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:41 BST	Patricia.Jones	Treasury Hedging Specialist - IT	Finance & Accounting	Finance & Accounting						
6	Treasury Director	business	Enabled	Directs budget and cost controls, financial analysis, accounting practices and report	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:42 BST	Patricia.Jones	Treasury Director - IT	Finance & Accounting	Finance & Accounting						
7	Treasury Currency Analyst	business	Enabled	Audit rate reset, rollover and interest/fee due statements for the company credit fac	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:41 BST	Patricia.Jones	Treasury Currency Analyst - IT	Finance & Accounting	Finance & Accounting						
8	Treasury Analyst	business	Enabled	Provide analysis and recommendations as needed for investing/borrowing decisions	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:41 BST	Patricia.Jones	Treasury Analyst - IT	Finance & Accounting	Finance & Accounting						
9	Training & Development Specialist	business	Enabled	Plans, produces, and administers staff or management training seminars for the orga	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:43 BST	Dennis.Barnes	Training & Development Specialist	Human Resources	Human Resources						
10	Telecommunications and Network Ma	business	Enabled	Oversees telecommunications systems including voice, data, and video communicat	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:46 BST	Mary.Johnson	Telecommunications and Network	Network Systems Administrator	Data Communications Analyst						
11	Tax Manager	business	Enabled	Completes professional tax accounting activities that are complex in nature. Sets up	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:40 BST	Amanda.Ross	Tax Manager - IT	Tax Accountant	Tax Accountant						
12	Tax Director	business	Enabled	Establishes and carries out a campaign to reduce the organization's tax debt. Adhere	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:40 BST	Lori.Ferguson	Tax Director - IT	Tax Manager	Tax Manager						
13	Tax Accountant	business	Enabled	Completes professional tax accounting activities for an organization. Sets up and re	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:40 BST	Patricia.Jones	Tax Accountant - IT	Finance & Accounting	Finance & Accounting						
14	Staging Test Engineer	business	Enabled	Determines modifications required to produce products and tests processes to ensu	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Debra.Wood		Engineering	Engineering						
15	Staging Developer	business	Enabled	Determines operations required to build products and develops processes to ensur	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Debra.Wood		Engineering	Engineering						
16	SQL Server Administrator	business	Enabled	Performs installations, upgrades, patches, monitoring, backup and recovery, DR on	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:48 BST	Jane.Grant	SQL Server Administrator - IT	Information Technology	Information Technology						
17	SOX Controls Manager	business	Enabled	Provides control ownership and modification of controls when necessary. This role	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	Mary.Johnson		Compliance Processes	Compliance Processes						
18	SOX Access Reviewer	business	Enabled	Serves as an access reviewer/approver for SOX related controls. This role serves to cat	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	Mary.Johnson		Compliance Processes	Compliance Processes						
19	Security Architect	business	Enabled	Evaluates and researches current and new security controls and implementations. S	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:51 BST	Debra.Wood	Security Architect - IT	Information Technology	Information Technology						
20	Recruiter	business	Enabled	Screens and interviews for non-exempt and exempt positions. Conducts pre-employ	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:42 BST	John.Williams	Recruiter - IT	Human Resources	Human Resources						
21	Receiving Analyst	business	Enabled	Receives incoming and ships outgoing materials, products, or supplies. Counts item	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	Dennis.Barnes	Receiving Analyst - IT	Inventory Management	Inventory Management						
22	RACF Security Administrator	business	Enabled	Evaluates and researches current and new security controls and implementations w	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:51 BST	Mary.Johnson	RACF Security Administrator - IT	Information Technology	Information Technology						
23	QA Analyst	business	Enabled	Researches the related products and technologies to find problems and improve	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Jane.Grant		Engineering	Engineering						
24	Production Test Engineer	business	Enabled	Tests software operating or applications systems. Monitors build processes and sou	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Mary.Johnson		Engineering	Engineering						
25	Production Developer	business	Enabled	Creates and produces software operating or applications systems. Modifies build p	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Mary.Johnson	Production Developer - IT	Engineering	Engineering						
26	Production Code Approver	business	Enabled	Directs production code operations and processes. Plans and maintains production	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Debra.Wood		Production Developer	Production Developer						
27	Product Developer	business	Enabled	Focuses on customer facing applications. Creates and produces software operating o	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Jane.Grant		Engineering	Engineering						
28	Procurement Manager	business	Enabled	Manages inventory of materials, parts, and finished product to maintain required s	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:53 BST	Randy.Knight	Procurement Manager - IT	Procurement Analyst	Procurement Analyst	Cost Savings Analyst	Procurement Buyer				
29	Procurement Buyer	business	Enabled	Accomplishes various purchasing assignments that are fairly complicated in nature.	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:53 BST	Randy.Knight	Procurement Buyer - IT	Inventory Management	Inventory Management						
30	Procurement Analyst	business	Enabled	Performs activities to monitor and maintain inventory control of merchandise or m	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:53 BST	John.Williams	Procurement Analyst - IT	Inventory Management	Inventory Management						
31	Payroll Approver	business	Enabled	Manages the preparation, distribution, and reporting processes for payroll. Overse	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:39 BST	Patricia.Jones	Payroll General Access - IT	Payroll Analyst	Payroll Analyst						
32	Payroll Analyst	business	Enabled	Manages the preparation, distribution, and reporting processes for payroll. Overse	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:39 BST	Amanda.Ross	Payroll General Access - IT	Finance & Accounting	Finance & Accounting						
33	Organizational IT Controls Coordinator	business	Enabled	Provides control ownership and modification of controls when necessary. This role	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	Mary.Johnson		Compliance Processes	Compliance Processes						
34	Oracle Administrator	business	Enabled	Performs installations, upgrades, patches, monitoring, backup and recovery, DR on	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:48 BST	Jane.Grant	Oracle Administrator - IT	Information Technology	Information Technology						
35	Network Systems Administrator	business	Enabled	Installs, configures, and maintains the organization's LAN server and workstations.	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:45 BST	Debra.Wood	Network Systems Administrator - I	Information Technology	Information Technology						
36	IT Distributed Systems Manager	business	Enabled	Oversees the development and maintenance of operating systems. Directs account	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:47 BST	Mary.Johnson	IT Distributed Systems Manager - IT	Windows Administrator	Unix Administrator						
37	IT Database Manager	business	Enabled	Manages the design and development of IT databases and related master files. Over	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:49 BST	Mary.Johnson	IT Database Manager - IT	Oracle Administrator	SQL Server Administrator						
38	Inventory Manager	business	Enabled	Supervises the shipment or receipt of outgoing or incoming materials, parts, or prod	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	John.Williams	Inventory Manager - IT	Inventory Analyst	Receiving Analyst						
39	Inventory Analyst	business	Enabled	Supervises the shipment or receipt of outgoing or incoming materials, parts, or prod	28 Jun 2018 15:08:14 BST	28 Jun 2018 15:11:54 BST	Dennis.Barnes	Inventory Analyst - IT	Inventory Management	Inventory Management						
40	Internal QA Reviewer	business	Enabled	Develops and implements quality assurance standards, processes, and controls. Dev	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:53 BST	Jane.Grant	Internal QA Manager - IT	QA Analyst	QA Analyst						
41	Internal Development Facilitator	business	Enabled	Focuses on internal tools and applications. Creates and produces software operat	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Jane.Grant	Internal Development Manager - IT	Engineering	Engineering						
42	Internal Auditor	business	Enabled	Conducts audits to verify accuracy of records, compliance with standards, policies	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:39 BST	Lori.Ferguson	Internal Auditor - IT	Finance & Accounting	Finance & Accounting						
43	Internal Audit Manager	business	Enabled	Directs review and verification of records, compliance with standards, policies and	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:39 BST	Patricia.Jones	Internal Audit Manager - IT	Internal Auditor	Internal Auditor						
44	Information Security Manager	business	Enabled	In charge of inventory control	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:52 BST	Mary.Johnson	Information Security Manager - IT	Information Security Analyst	Security Architect	RACF Security Administrator					
45	Information Security Analyst	business	Enabled	Manages disaster recovery functions for information systems. Arranges and adminis	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:51 BST	John.Williams	Information Security Analyst - IT	Information Technology	Information Technology						
46	HR Manager	business	Enabled	Manages human resources activities or administers policies according to executive	28 Jun 2018 15:08:12 BST	28 Jun 2018 15:11:43 BST	Randy.Knight	HR Manager - IT	Recruiter Training & Development Specialist	Recruiter Training & Development Specialist						
47	Helpdesk Manager	business	Enabled	Oversees the planning, installation, control, and maintenance of personal comput	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:50 BST	Debra.Wood	Helpdesk Manager - IT	Helpdesk Associate	Helpdesk Associate						
48	Helpdesk Associate	business	Enabled	Responds to inquiries and requests for assistance with the organization's comput	28 Jun 2018 15:08:13 BST	28 Jun 2018 15:11:49 BST	Debra.Wood	Helpdesk Associate - IT	Information Technology	Information Technology						

The current version of the IdentityIQ Summarizer is limited to the summarizing the following object types:

- Rule
- Workflow
- Application
- TaskDefinition
- RuleReference
- Bundle
- IdentityTrigger
- CorrelationConfig
- Policy
- QuickLink
- Form
- ObjectConfig
- Workgroup