

*IdentityIQ Accelerator Pack Steps*

Table of Contents

Sequence of Steps to Configure Authoritative Applications 3

Sequence of Steps for Global Settings 5

Sequence of Steps for Non - Authoritative Applications 6

**Document Revision History**

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## Sequence of Steps to Configure Authoritative Applications

* Connect and Define Schema of Authoritative Applications
  + Make sure Test Connection is successful
  + Make sure Application is marked Authoritative
* In case Correlation requires OR Conditions, use OOTB Application Administrative pages to set up correlation
* Rapid Application Onboarding Quick Link (Self Service Onboarding)
  + Authoritative Application - Employees
    - Aggregation Feature
      * Correlation Configuration
      * Disable and Lock Configuration on Onboarding Form
      * Make sure rule “Rule-FrameWork-Correlation” is set as correlation rule and rule “Rule-Framework-RapidAppOnBoarding-Customization-Rule” is set as customization rule automatically Make sure rule “Rule-FrameWork-Preiterate-DelimitedFile” is set as pre-iterate rule on delimited connector automatically
      * Define Java Regular Expressions on Application Only if Self Service Onboarding Form is not sufficient for the requirements
    - Configure Attribute Synchronization Feature (Optional)
  + Authoritative Application – Students (Optional)
    - Aggregation Feature
      * Correlation Configuration
      * Disable and Lock Configuration on Onboarding Form
      * Make sure rule “Rule-FrameWork-Correlation” is set as correlation rule and rule “Rule-Framework-RapidAppOnBoarding-Customization-Rule” is set as customization automatically Make sure rule “Rule-FrameWork-Preiterate-DelimitedFile” is set as pre-iterate rule on delimited connector automatically
      * Define Java Regular Expressions on Application Only if Self Service Onboarding Form is not sufficient for the requirements
    - Configure Attribute Synchronization Feature (Optional)
  + Authoritative Application – Non – Employees
    - Aggregation Feature
      * Enable Non-Employee Repository
      * Correlation Configuration
      * Disable and Lock Configuration on Onboarding Form
      * Make sure rule “Rule-FrameWork-Correlation” is set as correlation rule and rule “Rule-Framework-RapidAppOnBoarding-Customization-Rule” is set as customization rule automatically
      * Make sure rule “Rule-FrameWork-Preiterate-DelimitedFile” is set as pre-iterate rule on delimited connector automatically
      * Define Java Regular Expressions on Application Only if Self Service Onboarding Form is not sufficient for the requirements
    - Configure Attribute Synchronization Feature (Optional)
  + Authoritative Application – Service Accounts (Optional)
    - Aggregation Feature
      * Enable Service Account Repository
      * Correlation Configuration
      * Disable and Lock Configuration on Onboarding Form
      * Make sure rule “Rule-FrameWork-Correlation” is set as correlation rule and rule “Rule-Framework-RapidAppOnBoarding-Customization-Rule” is set as customization rule automatically
      * Make sure rule “Rule-FrameWork-Preiterate-DelimitedFile” is set as pre-iterate rule on delimited connector automatically
      * Define Java Regular Expressions on Application Only if Self Service Onboarding Form is not sufficient for the requirements
    - Configure Attribute Synchronization Feature (Optional)
* Employee Identity Mappings
  + Implement Authoritative Source Mappings
  + Persona (Optional)
    - Refer sample Rules to implement “relationship” attribute
* Non-Employee Identity Mappings (Optional)
  + Implement Authoritative Source Mappings
  + Persona (Optional)
    - Refer sample Rules to implement “relationship” attribute
* Student Identity Mappings (Optional)
  + Implement Authoritative Source Mappings
  + Persona (Optional)
    - Refer sample Rules to implement “relationship” attribute
* Service Account Identity Mappings (Optional)
  + Implement Authoritative Source Mappings
* Aggregate Authoritative Application - Employees
* Aggregate Authoritative Application - Non- Employees (Optional)
* Aggregate Authoritative Application - Student (Optional)
* Aggregate Authoritative Application - Service Account (Optional)
* Smart Setup Quick Link->Mine Provisioning Policies - For Authoritative Application - Non- Employees (Optional) - This is used for Non-Employee Account Synchronization for Create and Edit Quick Link
* Implement Unmined Provisioning Policies for Authoritative Application - Non- Employees (Optional) - This is used for Non-Employee Account Synchronization for Create and Edit Quick Link
* Smart Setup Quick Link->Mine Provisioning Policies - For Authoritative Application - Service Accounts (Optional) - This is used for Service Account Synchronization for Create and Edit Quick Link
* Implement Unmined Provisioning Policies for Authoritative Applications - Service Accounts (Optional) - This is used for Service Account Synchronization for Create and Edit Quick Link

## Sequence of Steps for Global Settings

* Configure All Email Templates
  + Header – EmailTemplate “EmailTemplate-FrameworkHeader”
  + Footer – EmailTemplate “EmailTemplate-FrameworkFooter”
  + CSS – EmailTemplate “EmailTemplate-FrameworkStyleSheet”
  + Server Root Path – System Configuration
  + Configure Custom “Custom-Framework-EmailTextMapping” for any application (authoritative and non-authoritative) specific dynamic content (Optional)
* Smart Setup
  + Lifecycle Triggers
    - Configure
  + Global Definition
    - Configure
    - Implement any Workflow Exception Rules that can be referenced
    - Implement any Reassignment Exception Rules that can be referenced
  + Ticket Integration
    - Configure
    - Make sure plan initializer rule “Rule-Framework-Plan-Initializer” is set automatically
    - Configure SOAP Envelope directly on IntegrationConfig XML

## Sequence of Steps for Non - Authoritative Applications

* Connect and Define Schema of Authoritative Applications
  + Make sure Test Connection is successful
* In case Correlation requires OR Conditions, use OOTB Application Administrative pages to set up correlation
* Rapid Application Onboarding Quick Link (Self Service Onboarding)
  + Aggregation Feature
    - Correlation Configuration
    - Disable and Lock Configuration on Onboarding Form
    - Birthright Privileged and Service Account Configuration on Onboarding Form
    - Make sure rule “Rule-FrameWork-Correlation” is set as correlation rule and rule “Rule-Framework-RapidAppOnBoarding-Customization-Rule” is set as customization rule automatically
    - Make sure rule “Rule-FrameWork-Promote-Managed-Attribute” is set as Managed Entitlement Customization Rule automatically
    - Make sure rule “Rule-FrameWork-Preiterate-DelimitedFile” is set as pre-iterate rule on delimited connector automatically
    - Make sure rule “Rule-Audit-Framework” is set a after provisioning rule on the application automatically
    - Manually assign rule “Rule-FrameWork-Group-Refresh” as group refresh rule on group aggregation
    - Define Java Regular Expressions on Application Only if Self Service Onboarding Form doesn’t suffice the requirements
  + Run Aggregation of Application and Entitlements
  + Make sure Aggregation of Entitlements and Accounts is completed successfully
* Smart Setup Quick Link->Mine Provisioning Policies
  + Mine Provisioning Policies
  + Implement Unmined Provisioning Policies
  + Make sure Application **Identity Attribute** (aka Native Id is defined on Application Create Policy)
  + Make sure password field (secret) is defined on Application Create Policy
* Joiner - Configure Birthright  Population (Optional)
* Joiner - Configure Birthright Roles - Make sure it is a **birthright** role type and **isBirthright** property is true, and **birthright population** is defined on these roles (Optional)
* Policy Violation - Configure Eligibility Population for Policies Make sure population name starts with application name (Optional)
* Policy Violation - Configure SOD Policies - Make sure policy name starts with application name (Optional)
* Policy Violation - Configure Multiple or Single Account Single Entitlement SOD Advanced Rule and Single Entitlement Custom Object Exceptions - Make sure policy name and custom object starts with application name (Optional)
* Policy Violation - Configure Multiple or Single Account SOD Toxic Combinations Advanced Rule and Toxic Combination Custom Object - Make sure policy name and custom object starts with application name (Optional)
* Approvals - Configure 1st or 2nd level Application Approval Workgroups - Make sure workgroup name starts with application name (Optional)
* Approvals - Configure 1st or 2nd level Entitlement Approval Workgroups or 1st or 2nd level Role Approval Workgroups (Optional)
* Logical Applications - Configure Logical Applications on Entitlements and Roles via Entitlement Catalog or Role Administrative Pages (Optional)
* Complex Entitlements- Configure Role - Make sure business role name starts with application name and role is created under “Form Roles” organizational role
  + Make “Requestor Form Application Name” is set as application name
  + Make sure this business role has not IT Role association
* Complex Entitlements - Configure Form - Make sure form name starts with application name
  + Implement any Complex Entitlement Form Rules
* Rapid Application Onboarding Quick Link (Self Service Onboarding)
  + Configure Joiner
  + Configure Mover
  + Configure Leaver
  + Configure Native Change
  + Configure Access Request
  + Configure Policy Violation
  + Configure Attribute Synchronization
  + Configure Password Synchronization
  + Configure New Account Entitlement Dependency
  + Configure Provisioning
  + Configure Ticket Integration
* Implement any Application Drop-Down Exception Rules
  + Rehire Extended Rule - Joiner
  + Return To Work From Long Term Disability Extended Rule - Joiner
  + Return To Work From Leave of Absence Extended Rule - Joiner
  + Reverse Termination Extended Rule - Joiner
  + Termination Extended Rule - Leaver
  + Long Term Disability Extended Rule - Leaver
  + Leave Of Absence Extended Rule - Leaver
  + Before Mover Extended Rule - Mover
  + Password Expiration Date Rule - Privileged
  + After Ticket Provisioning Extended Rule - Ticket Integration
  + Refer these exception rules on Application via Administrative Page
* Implement any Application Access Request Exception Rules
  + Omit or Override with Multiple Manager Approval Rule
  + Omit or Override IdentityIQ 2nd Level Business Approvers Rule
  + Omit or Override IdentityIQ 1st Level Business Approvers Rule
  + Display Form Rule – Complex Entitlements
  + Refer these exception rules on Application via Administrative Page
* Implement any Application Conditional New Account Entitlement Dependency Exception Rule
  + Conditional Omit Dependency Application Entitlements Rule
  + Refer this exception rule on Application via Administrative Page
* Implement any Application Attribute Synchronization Exception Rules
  + Refer these exception rules on Custom Object “Custom-FrameworkAttributeSyncMapping”
* Add additional form fields to following forms
  + Accelerator Pack Create Identity
  + Accelerator Pack Edit Identity
  + Accelerator Pack Registration Identity
* Implement any Unique Id Generation Rules
  + Modify Rule Rule-FrameWork-Generate-Unique-Id (Create)
  + Modify Rule Rule-FrameWork-Registration-Generate-Unique-Id (Register)
* Implement any Power Shell Script Rules
  + Refer these rules on Application XML directly
* Implement any Role Account Selector and Role Assignment Rules
  + Refer these rules on Role XML directly or via Role Administrative Page
* Implement any Target Collector Rules
  + Refer these rules on Application via Application Administrative Page
* Implement any JDBC Connector Provisioning Rules
  + Refer these rules on Application via Application Administrative Page