



## MidPoint Community Meetup 2025

### First Steps Methodology Workshop

# Agenda

- First Steps Methodology Introduction
- Utilizing First Steps Methodology
- Live Workshop
- Conclusion



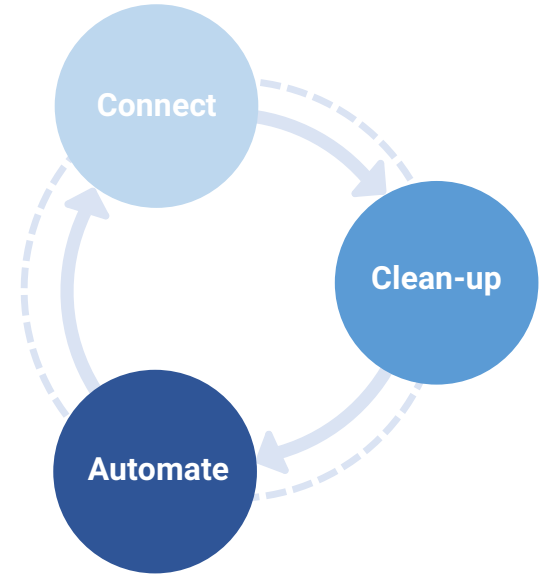
## First Steps Methodology: Introduction

- “Guide to quick midPoint deployment of simple midPoint configurations”
- But can be used with more complex environments as well
- **Goal:** Start using midPoint in your organization by connecting your first source and target system
- **Safe deployment** heavily utilizing **simulations** and **account marks**
- Prevents **unexpected changes or deletions** in target systems during the deployment
- **Increases the confidence** even with low-quality data
- GUI-based (no XML!)



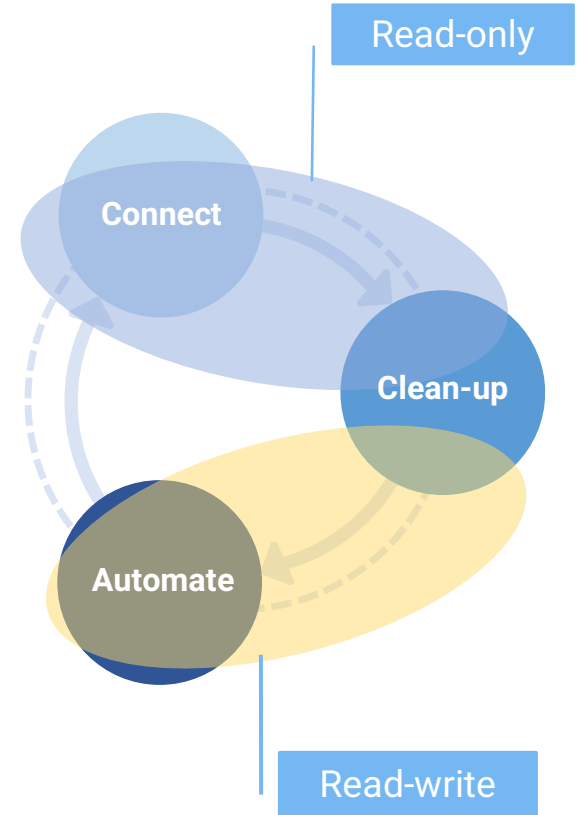
## First Steps Methodology

- *Iterative* identity management program
- **Connect, Clean-up, Automate**
- Docs: [First Steps Methodology](#)

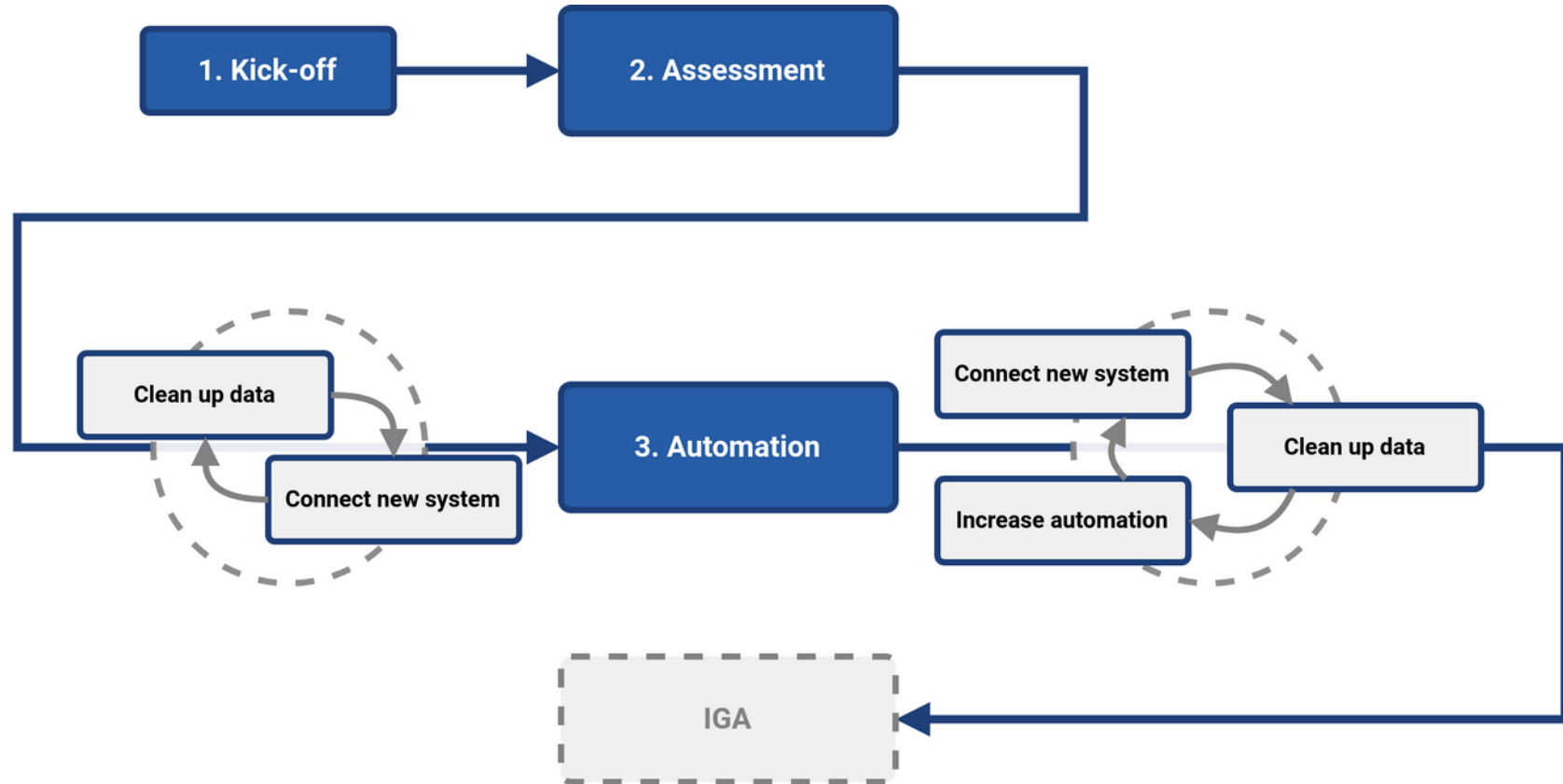


## First Steps Methodology (2)

- **Connect:** Connect new system(s) to the solution. Read/analyze data
- **Clean-up:** Improve data quality. Correlate, resolve orphaned accounts, identify data errors
- **Automate:** Speed up the processes, improve the efficiency. On-boarding, data updates, off-boarding (JML – Joiners, Movers, Leavers)



# First Steps Methodology Big Picture



# Utilizing First Steps Methodology

## 1 Plan Your Deployment

*Identify data sources, targets, plan resources, timing and money*

## 2 Connect Source System (HR)

*Connect HR system using CSV file and preview data*

## 3 Import Source Data

*Import data from HR system, create users in midPoint*

## 4 Connect Target System (AD)

*Connect the AD using a resource template and preview data*

## 5 Target System Integration

*Correlate existing accounts to midPoint users (HR data)*

## 6 Import Usernames from Target System

*Import usernames from AD to midPoint*

## 7 Enable Provisioning to Target System

*Prep AD resource for provisioning from midPoint, first with simulation*

## 8 Automate Integration

*Automate HR→AD account provisioning (JML)*

## 9 Override Incorrect Data

*Make sure we can override incorrect data from HR if needed*

ⓘ Workshop scope depends on time, questions and participant pace.

## Why Simulations?

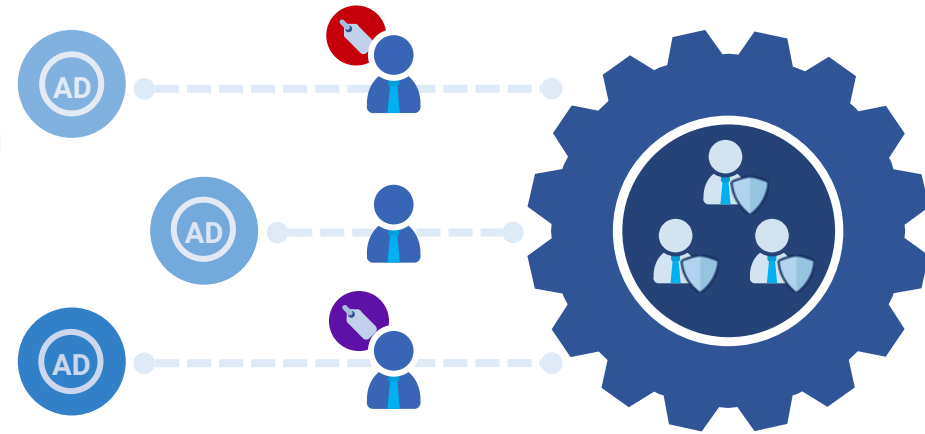
- Configuration is seldom correct for the first time
- Data can be unexpectedly deleted or modified by incorrect configuration or if target system data is inconsistent
- Incremental adding of new features is **safer** with simulations
- “**What would happen if...**” → You have time to react before you damage anything
- Docs: [Simulations](#)





## Why (Account) Marks?

- **Marks** allow **exceptions** from policies
  - Protected, Do not touch, Correlate later and more
- Example: *permanently* protect certain accounts from being processed or deleted (e.g., system accounts)
- Example: *temporarily* protect certain accounts from being processed or deleted, and postpone the decision to a later time to allow the deployment process to continue (e.g., accounts that *seem* to be system accounts)
- Also useful in reporting and analytics



# Workshop Teaser

midPoint

Account marks

Dashboards > Account marks

administrator

SELF SERVICE <

ADMINISTRATION ▾

Dashboards ▾

Info dashboard

Admin dashboard

Account marks

3  
Protected accounts  
More info

0  
Correlate later accounts

1  
Do not touch accounts

0  
Decommission later accounts

Simulation task details

Start timestamp  
December 6, 2023 at 8:38:44 AM UTC

End timestamp  
December 6, 2023 at 8:38:56 AM UTC

Finished in  
12 seconds

Task  
Reconciliation with AD - development simulation

Status  
Finished

Configuration  
Development

Added objects  
0

Deleted objects  
0

Modified objects  
16

Unmodified objects  
104

All processed  
120

Event marks

Focus activated  
0  
More info

Focus deactivated  
0  
More info

Focus renamed  
0  
More info

Focus assignments changed  
0  
More info

Focus archetype changed  
0  
More info

Focus parent organization referenc...  
0  
More info

Focus role membership changed  
0  
More info

Projection activated  
0  
More info

Projection deactivated  
2  
More info

Projection renamed  
5  
More info

Projection identifier changed  
5  
More info

Projection entitlement changed  
0  
More info

Projection password changed  
0  
More info

Resource object affected  
8  
More info

Evolveum

MidPoint  
Community  
Meetup  
2025

## Live Demo Agenda (All Times Except Coffee Break Are Estimated)

Estimated time	Topic
9:00 – 9:15	Introduction
9:15 – 9:25	Workshop; Module 1
9:25 – 9:45	Workshop; Module 2
9:45 – 10:05	Workshop; Module 3
10:05 – 10:15	Workshop; Module 4
<b>10:15 – 10:45</b>	<b>Coffee Break (30 min.)</b>
10:45 – 10:55	Workshop; Module 4
10:55 – 11:35	Workshop; Module 5
11:35 – 11:45	Workshop; Module 6
11:45 – 12:00	Conclusion + Q&A



ⓘ Workshop scope depends on time, questions and participant pace.

## Live Workshop

(Based on MidPoint Deployment: First Steps training materials)

*Please make sure you have followed the workshop prerequisites.*

## Conclusion

- We have demonstrated midPoint deployment in iterations using First Steps Methodology
- We have used only GUI, no XML
- (Workshop scope depends on time, questions and participant pace.)
- **MidPoint Deployment: First Steps self-paced training** is now [available free of charge to everyone](#)
- See how you can [access our learning portal](#)





**Thank you for your attention**

Feel free to ask your questions now!



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