MidPoint Community
Meetup 2025

First Steps Methodology Workshop

Evolveum

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Expert Identity Engineer

Agenda

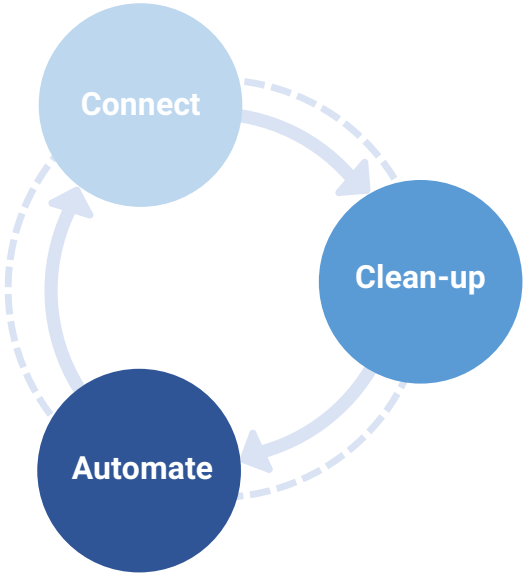
- First Steps Methodology Introduction
- Utilizing First Steps Methodology
- Live Workshop
- Conclusion

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!)

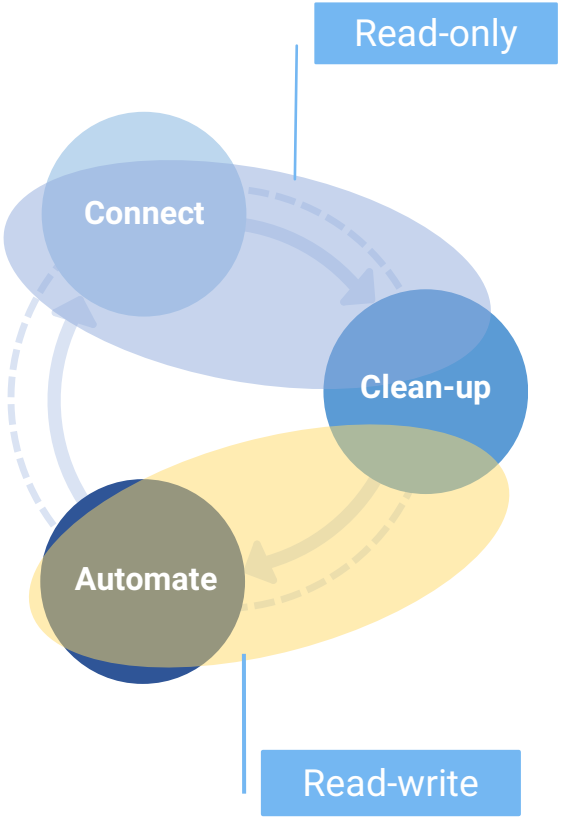
First Steps Methodology

- *Iterative* identity management program
- **Connect, Clean-up, Automate**
- Docs: First Steps Methodology

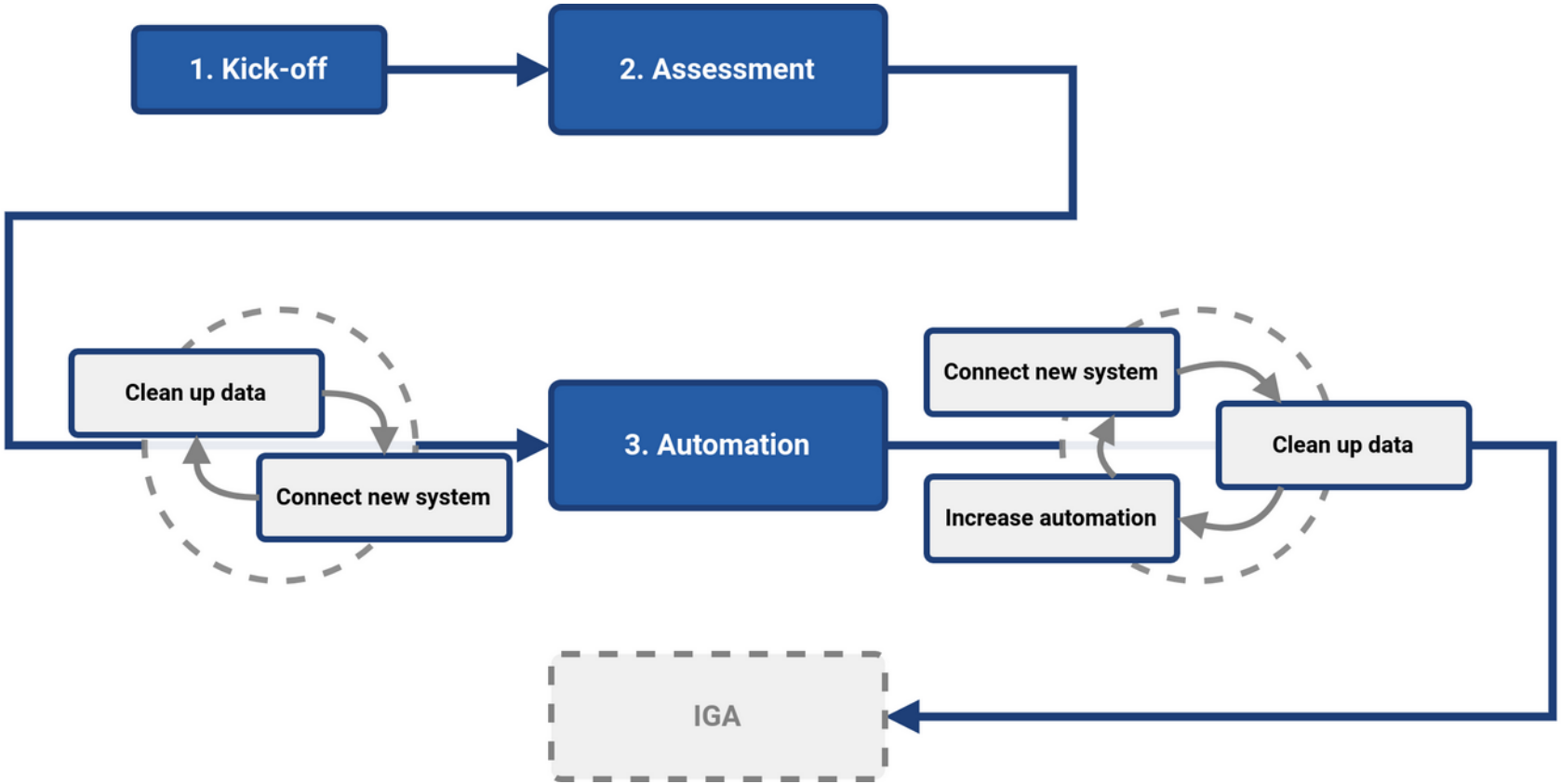


First Steps Methodology (2)

- **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

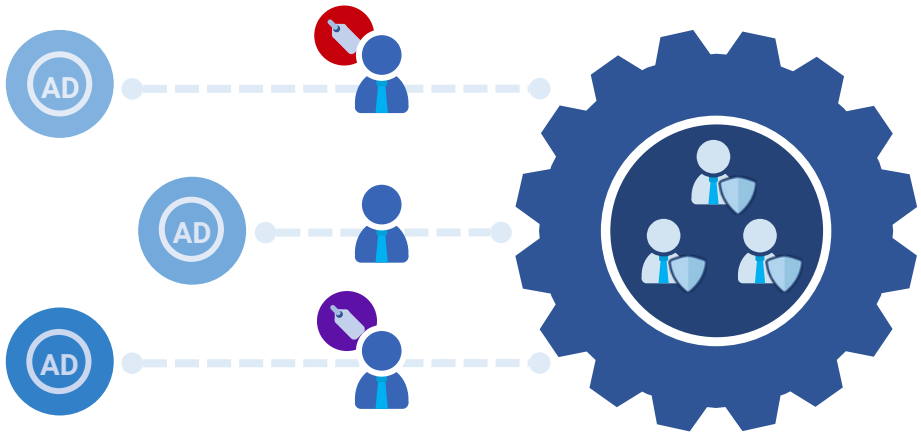
ⓘ Workshop scope depends on time, questions and participant pace.

Why Simulations?

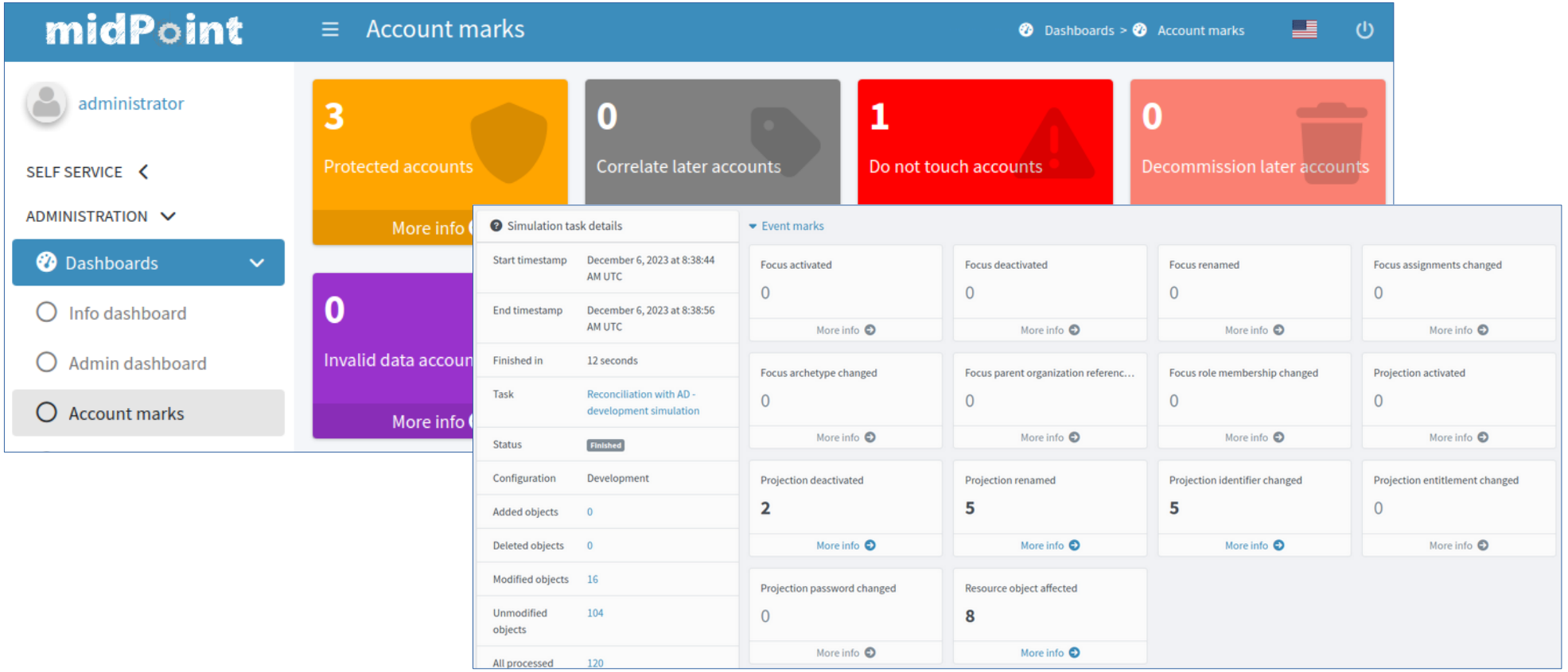
- Configuration is seldom correct for the first time
- Data can be unexpectedly deleted or modified by incorrect configuration or if target system data is inconsistent
- Incremental adding of new features is **safer** with simulations
- **“What would happen if…”** → You have time to react before you 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



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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
10:15 – 10:45	**Coffee Break (30 min.)**
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

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Thank you for your attention
Feel free to ask your questions now!
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