

Roles - Import of data from CSV

1. Prepare the CSV file

Here is an example of a CSV file which can be used for importing (or updating) roles, setting their role attributes, guarantees (by user, or by role) and criticality, for saving them in a created catalogue and for assigning their subordinate role. To use this CSV file, create a new identity with user name "user_login", and a new role with code "role_code".

```
roles;description;attribute;guarantees;guarantee
role;criticality;catalogue;subroles
Manager-A;Leader;;;;;role_code
LAY-SP;Manager;attr1;user-login;role_code;3;cat4;
"CORE-CLOSE
AB-role";desc;attr1;;;2;"cat1
cat3";
```

In Excel, it looks like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	roles	code	description	attribute	guarantees	guarantee_type	guarantee_role	guarantee_role_type	criticality	catalogue	subroles	attrcode1	attrvalue1	systemname1	systemattr1	systemvalue1
2	testimportrolename	testimportrolecode	desc	attr1	user-login		role_code			4;cat1;cat3		see	value	test	rights	testimportrolename

As you can see roles column can contain single or multiple values (separated by a line; the separator can be specified in the settings of the LRT). For multivalued roles, values from the same row will be added to every role. The only exception here is role criticality which cannot be multivalued. CSV file can have optional number of columns: column names are specified in setup of LRT.

The result of this LRT used with this CSV file should:

- 4 new roles (Manager-A, LAY-SP, CORE-CLOSE, AB-role).
- Manager-A will have a description set (Leader) and a subrole set (role_code).
- LAY-SP will have a description (Manager), attribute (attr1), criticality (3), guarantee by identity (with user-name "user-login"), and guarantee by role (with role-code "role_code") set. It will be saved in catalogue cat4.
- Roles CORE-CLOSE and AB-role will have a description (desc), an attribute (attr1), and criticality (2) set. They will be in catalogues cat1 and cat3.

Create new LongRunningTask

Now we will create the new LongRunningTask (LRT). As shown in the picture, go to Settings → Task scheduler → Scheduled tasks and hit green "Add" button to add new LRT.

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+ Add

<input type="checkbox"/> Task type	Description	Instance	Task parameters	Scheduled starts	Actions
<input type="checkbox"/> HrContractExclusionProcess	Default	idm-primary		+ Add	<div></div> <div></div>
<input type="checkbox"/> HrEnableContractProcess	Start of contract's validity.	idm-primary		10.07.2019 01:45:00 + Add	<div></div> <div></div>
<input type="checkbox"/> HrEndContractProcess	Default	idm-primary		+ Add	<div></div> <div></div>
<input type="checkbox"/> IdentityContractExpirationTaskExecutor	Remove roles by expired identity contracts (=> removes assigned roles).	idm-primary		10.07.2019 01:00:00 + Add	<div></div> <div></div>
<input type="checkbox"/> IdentityRoleExpirationTaskExecutor	Remove expired roles.	idm-primary		10.07.2019 01:15:00 + Add	<div></div> <div></div>
<input type="checkbox"/> IdentityRoleValidRequestTaskExecutor	Start of assigned role's validity.	idm-primary		10.07.2019 01:30:00 + Add	<div></div> <div></div>
<input checked="" type="checkbox"/> ImportRolesFromCSVExecutor	Get all roles on mapping - system and import from CSV to IDM	idm-primary	Column with description:description System name:AMISH Form definition code:formDef Column with attributes:attribute Can be requested:true Import csv file:ce21b9c1-67b9-4ab7-95a0-50ff7f6d4fff Column separator; MemberOf attribute name:role Column with roles:roles	+ Add	<div></div> <div></div>
<input type="checkbox"/> ProvisioningQueueTaskExecutor	Default	idm-primary		09.07.2019 08:35:00 + Add	<div></div> <div></div>
<input type="checkbox"/> RetryProvisioningTaskExecutor	Default	idm-primary		09.07.2019	<div></div> <div></div>

Fill all attributes

Now we need to create new LRT with these attributes:

- Task type - **ImportRolesFromCSVExecutor** - Import csv file - dropzone to select or drop csv file
- Column with roles - name of the column with roles in csv file - Column with role codes - name of the column with role codes in csv file; if left empty, the role code is based on the role name, only spaces " " are replaced by "_"
- Column with description - name of the column with role description, can be also used to update description (if your CSV file doesn't contain descriptions, i.e., you are not setting description for any of your roles, leave this line empty)
- Column with role attributes - name of the column with role attributes, can be also used to update attributes (if your CSV file doesn't contain attributes, i.e., you are not setting attributes for any of your roles, leave this line empty)
- Column with criticality - name of the column with role criticality, can be also used to update criticality (if your CSV file doesn't contain criticality, i.e., you are not setting criticality for any of your roles, leave this line empty); if no criticality is specified, the default is 0
- Column with guarantee - name of the column with role guarantee by identity login, can be also used to update guarantee (if your CSV file doesn't contain guarantees, i.e., you are not setting guarantees for any of your roles, leave this line empty)
- Column with guarantee role - name of the column with role guarantee by role code, can be also used to update role guarantee (if your CSV file doesn't contain role guarantees, i.e., you are not setting role guarantees for any of your roles, leave this line empty)
- Column with catalogue names - name of the column with catalogue names, can be also used to update catalogue names (if your CSV file doesn't contain catalogue names, i.e., you are not setting catalogues for any of your roles, leave this line empty)
- Column with subroles to be assigned - name of the column with subordinate roles codes, can be also used to update subordinate roles (if your CSV file doesn't contain subordinate roles codes, i.e., you are not setting subordinate roles for any of your roles, leave this line empty)
- Form definition code - the code for the definition which will contain the added attributes (you only have to fill this if you are setting attributes)
- Column separator - separator of columns in csv file (default ;)
- Multi value separator - (Char, default: new line) separator of multi valued role names in the csv file, new line separator is default export from excel, but for better clarity of the csv file, it's recommended to use some symbol instead
- System name - name of the system to connect with roles (if you do not

want to connect your roles to any system, leave this line empty) - MemberOf attribute name - name of multi valued attribute for merge; (if you do not want to do that, leave this line empty) - Role environment - the name of the environment to which you want to add the role; only supported during creating, not updating roles! - Can be requested - (Boolean) - Roles can be requested, can be also used to update already imported settings; it allows not selecting value when updating (not when creating!) roles which will not change the Can be requested property of roles. When creating roles, either Yes or No must be selected.



If you are updating the roles, make sure to set the same form definition the role already have (if they have any). Also, each role can only have one definition, so if you by mistake set a different definition in the LRT configuration, you will likely get an error. Generally, DO NOT use this LRT to change the definition of a role. You can only change the definition if the role has no attributes set yet.



This LRT can be used to update existing values but it **does not** remove old values. The only overwritten values during update are role criticality and description. They will be changed only if they are not empty in the CSV file

Task details

Task type

ImportRolesFromCSVExecutor

Get all roles on mapping - system and import from CSV to IDM

Description

Get all roles on mapping - system and import from CSV to IDM

Instance

Idm-primary

Execute on server (Instance Identifier)

Task parameters

Import csv file

Drag file here, or click to select file.

Column with roles

roles

Column with role codes

roles

Column with description

description

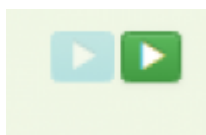
Column with role attributes

attribute

Column with criticality
<input type="text" value="criticality"/>
Column with guarantees
<input type="text" value="guarantees"/>
Column with guarantee types
<input type="text" value="guarantee_type"/>
Update guarantee types
<input type="text" value="No"/> ✕ ▼
Column with guarantee roles
<input type="text" value="guarantee_role"/>
Column with guarantee role types
<input type="text" value="guarantee_role_type"/>
Update guarantee role types
<input type="text" value="No"/> ✕ ▼
Column with catalogue names
<input type="text" value="catalogue"/>
Column with sub roles codes
<input type="text" value="subroles"/>
Form definition code
<input type="text"/>
Column separator
<input type="text" value=";"/> ★
Multi value separator
<input type="text" value="Default: new line"/>

Run the task

Now we need to hit run.



Now we must go to the "all tasks" panel, select the newly created LRT (check the checkbox), click Operation with selected record and Run selected task.

Scheduler

Running tasks Scheduled tasks All tasks

Operation with selected record: Run selected tasks Cancel

Task state Type or description of task

Run all created tasks Filter Cancel filter Filter

State	Created	Task type	Parameters	Description	Processed	Id
Created	17.07.2019 08:25:38	ImportRolesFromCSVExecutor	Column with role attributes: attributes Column with guarantee: guarantee Import csv file: d3019944-5ba2-42f3-b8b0-1cf89b3857bb core:instanceid: idm-primary Column with description: description Column with criticality: criticality System name: SYSTEM Column with catalogue names: catalogues Form definition code: gb Column separator: ; core:dryRun: false Column with roles: roles	Get all roles on mapping - system and import from CSV to IDM		bfe2f73

You can also check the status of the created roles there in the task detail. Here you can find information about roles created, updated, or already existing.

At this point, everything should be set up and when the task ends, roles are imported in IdM with their attributes and other imported values, and placed in the catalogue named by the system name.

LAY-SP Role details

Basic information More information Role attributes Business role Incompatible roles Role authorizers Role catalogue Permissions Automatic roles Users with role Systems Accounts

Definition of assigned attributes

formDef (formDef) Save

First select (and save) the main definition. From this definition, you can select attributes that should be filled in during role assignment.

Role attributes

Attribute definition	Default value	Required	Unique value	Minimal value	Maximum value	Regular expression
attr1						

1 - 1 of 1 records

Known issues

If you delete or upload new file via dropzone, you should delete old files, created from previous uploads.

From:
<https://wiki.czechidm.com/> - IdStory Identity Manager

Permanent link:
https://wiki.czechidm.com/tutorial/adm/roles_-_import_data_from_csv?rev=1568724203

Last update: 2019/09/17 12:43

