



Managing Process Triggers

Steve Miller - 2018-07-18 - IAM

Process Triggers are the middle-man of IAM. They take a list of people in your organization, which is generated by a trigger function (aka, condition), and passes each person into a designated process (onboard, offboard, name change, transfer, etc.). Knowing how to manage these triggers is an important part of having IAM as a productive part of your organization.

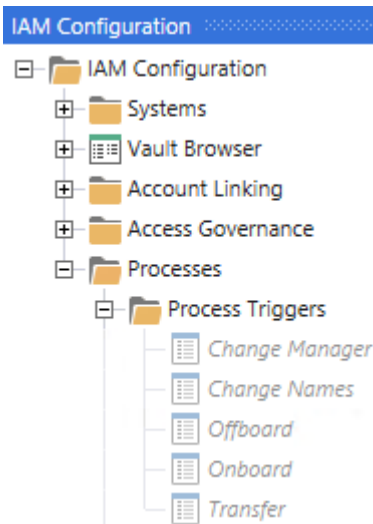
Note: Only Process Triggers that have been configured by your Tools4ever consultant should be managed. Process Triggers that have not been configured should not be enabled.

To start managing your Process Triggers, follow these steps:

1. Open the IAM Management Studio.
2. Navigate to the Vault Configuration tab (lower-left set of double gears).



3. Expand *Processes > Process Triggers*.



4. Double click on the Process Trigger that you want to manage (e.g., Onboard). This will bring up the Process Trigger's properties window.

Onboard

Enable

Process

Priority

Condition →

Description

Guard

Max count

To enable or disable the Process Trigger, simply check or uncheck the **Enable** checkbox. Enabled triggers are evaluated and processed by IAM during its scheduled jobs.

The **Process** dropdown lets you choose which process to run on the people who are returned by the **Condition**. The **Condition** is an IAM trigger function that returns a list of people, such as those that need an account, or have had their names changed in the data source.

Priority specifies the order in which this Process Trigger is evaluated. IAM evaluates Process Triggers in descending order, so higher numbers go first. This number must be unique among enabled Process Triggers.

You may also give this trigger an optional **Description** if you want to take notes on the purpose or intended results of the Process Trigger.

Enabling the **Guard** feature prevents any processing of a Process Trigger's results if the number of people returned by the **Condition** exceeds the **Max Count** value. This is extremely useful for Process Triggers that may prevent users from accessing their accounts, such as the Offboard Process Trigger. The **Max Count** value that you specify should be carefully considered. Using offboards as an example, how many user accounts can be disabled at one time before you think something may be wrong with the data? The answer to that question is subjective and varies from organization to organization.