

# ForgeRock Identity Management Core Concepts

*(5 Days)*

## Course Description

The ForgeRock Identity Management Core Concepts course is for students who want to learn how to implement ForgeRock® Identity Management (IDM) to manage the lifecycle and relationship of digital identities within the context of a Customer Identity and Access Management solution (CIAM), and the integration with the ForgeRock Identity Platform™.

## Prerequisites

The following are the prerequisites to successfully completing this course:

- Basic knowledge and skills using the Linux operating system to complete labs
- Basic knowledge of JSON, JavaScript, REST, Java, Groovy, SQL, and LDAP helpful for understanding examples; however, programming experience is not required

## Skills Gained

Upon completion of this course, you should be able to:

- Introduce IDM and explore the fictitious ForgeRock Entertainment Company (FEC) CIAM solution
- Install IDM and examine the default interfaces
- Deploy and manage IDM as a development project
- Perform basic IDM troubleshooting
- Configure the default user registration process
- Configure the User Self-Service functions, including password reset, forgotten username, and KBA options
- Add a custom field to the End User UI registration page
- Delegate the administration privileges of account properties to a group of users
- Configure social identity providers
- Integrate IDM with the ForgeRock Identity Platform
- Use the REST interface to access IDM
- Connect to external resources using OpenICF
- Perform basic synchronization
- Run selective synchronization and LiveSync
- Configure role-based provisioning
- Manage user preferences
- Configure privacy and consent
- Enable progressive profiling and add terms and conditions

- Enable the profile and privacy management dashboard
- Manage a basic relationship within the managed user object
- Model relationships based on a given use case
- Manage a relationship between a user and device
- Deploy and test a given workflow
- Explore the beginnings of creating a workflow

## Who Can Benefit

The following are the target audiences for this course:

- System Integrators
- System Consultants
- System Architects
- System Administrators

## Course Outline

### Chapter 1: Introducing IDM and Getting Started

#### Lesson 1: Introducing IDM and Exploring the FEC Solution

- Describe how IDM is used in the ForgeRock Identity Platform to deliver a CIAM solution
- Demonstrate each of the core concepts from an end user and administrator perspective

#### Lesson 2: Installing IDM

- Describe the basic IDM installation requirements for deploying IDM
- Install and start IDM for the first time and explore the default UIs
- Start IDM with the CSV sample configuration and run the sample
- Start IDM with the LDAP sample configuration and run the sample

#### Lesson 3: Deploying and Managing IDM as a Project

- Set up a new IDM project for development
- Configure IDM to run as a background process

#### Lesson 4: Performing Basic IDM Troubleshooting

- Examine the different log files in IDM
- Get additional help troubleshooting outside of IDM

### Chapter 2: Enabling User Registration and Self-Service

#### Lesson 1: Configuring the Default User Registration Process

- Configure the outbound email service
- Enable email-based self-registration

#### Lesson 2: Configuring IDM User Self-Service

- Enable email-based password reset and username retrieval
- Expand the KBA options
- Add a custom field to the Self-Service UI registration page

### **Lesson 3: Delegating Administration Privileges**

- Add a new internal role and set up privileges to delegate administration

## **Chapter 3: Adding Social Registration and Authentication**

### **Lesson 1: Configuring Social Identity Providers**

- Set up a social ID provider for Google and test social registration
- Set up a social ID provider for Facebook or others (optional)

### **Lesson 2: Integrating IDM with the ForgeRock Identity Platform**

- Prepare the ForgeRock Identity Platform components
- Delegate all IDM authentication to AM

## **Chapter 4: Managing Synchronization and Reconciliation**

### **Lesson 1: Using the REST Interface to Access IDM**

- Query and manipulate IDM objects using the API Explorer and cURL

### **Lesson 2: Connecting to External Resources Using OpenICF**

- Describe how to connect to external resources using OpenICF
- Add a connector to an external LDAP resource

### **Lesson 3: Performing Basic Synchronization**

- Describe how to create sync mappings to flow identity objects and properties between IDM and one or more external resources
- Add a sync mapping from the IDM repository to the LDAP server
- Add a sync mapping from the LDAP server to the IDM repository

### **Lesson 4: Running Selective Synchronization and LiveSync**

- Run selective synchronization using filters
- Identify methods of determining change events with LiveSync
- Schedule LiveSync with the LDAP directory

### **Lesson 5: Configuring Role-Based Provisioning**

- Provision attributes to one or more external resources based on static role assignments
- Provision attributes to one or more external resources based on dynamic role assignments
- Add temporal constraints to a role

## **Chapter 5: Managing the IDM Privacy and Consent Options**

### **Lesson 1: Managing User Preferences**

- Configure synchronization filters with user preferences
- Extend the user preferences to include additional properties (optional)

### **Lesson 2: Configuring Privacy and Consent**

- Configure privacy and consent on a sync mapping
- Configure privacy and consent during user registration

### **Lesson 3: Enabling Progressive Profiling and Adding Terms and Conditions**

- Enable and configure progressive profiling
- Add terms and conditions to the registration process

### **Lesson 4: Enabling the Profile and Privacy Management Dashboard**

- Describe the tabs available on the Profile and Privacy Management Dashboard
- Review the IDM Self-Service UI while integrated with AM to display additional options on the dashboard

## **Chapter 6: Managing Relationships Between Objects in IDM**

### **Lesson 1: Managing Relationships in IDM**

- Describe the basic relationship model in IDM and why you might use relationships
- Demonstrate the existing manager and reports relationship within the managed user object
- Create a dashboard to visualize relationships
- Examine the managed user, role, and assignment object relationships in IDM

### **Lesson 2: Modeling Relationships in IDM**

- Describe how to model a new relationship based on business requirements
- Create a new relationship for a given relationship model in IDM

### **Lesson 3: Managing Devices and Things in IDM (Optional)**

- Add a connector to import device identities
- Create a new device managed object
- Set up a relationship between device managed objects and user managed objects
- Create a sync mapping to provision devices to the IDM repository

## **Chapter 7: Getting Started with Workflow**

### **Lesson 1: Deploying and Starting a Workflow**

- Describe use cases for workflows
- Describe how workflows are implemented in IDM
- Enable the workflow service in IDM and examine a sample workflow

### **Lesson 2: Deploying and Creating a Workflow**

- Describe the structure of workflow files
- Describe how to model workflows
- Describe how to use forms in workflows
- Examine, deploy, and start a workflow to let subscribers create Family and Friend accounts
- Create and deploy a simple workflow using Activiti Explorer