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Options

# Multiple Personas Management

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This document describes the recommended best practices for managing multiple personas in IdentityIQ. It discusses the two approaches and how to implement each.

## Overview

### What and Why Personas

Personas help to build an identity by defining the different ways in which an individual engages with an organization or enterprise. In some cases, an identity may have multiple personas.

Consider the healthcare provider ecosystem where physicians, nurses, professors, researchers, contractors, volunteers and students are just a handful of job functions that may be present in one healthcare provider organization. Yet many individuals can perform more than one function during any given day. To illustrate, a unit clerk in the emergency department may also be a nursing student who is doing a clinical rotation in the ICU. A physician may have an outpatient clinic for part of the day and in the morning perform research work in the afternoon. Also, nurses may float between departments. To complicate matters, many of these functions can be transient. Additionally, there may be multiple authoritative sources in addition to the human resources (HR) system, meaning a complete record of a person could involve incoming data points from ancillary systems not controlled by the HR team. Although we've specifically referenced the healthcare environment, the challenges are present across various industries and organizations. Whether in government, education or the financial sector, effectively managing multiple personas helps to ensure security and compliance.

### How IdentityIQ Addresses Multiple Personas

Not every situation where individuals perform multiple job functions require the solutions described in this white paper. Based on the customers' business needs, it may be unnecessary to delineate between personas for approvals, certifications, and attestations. In such circumstances, the personas can be managed via roles. However, if the individuals have different managers, or multiple employee IDs, then one of the best practices described in this white paper should be implemented.

There are two best practices recommended for managing multiple personas in IdentityIQ.

1. Persona Relationship Approach
2. Linked Relationship Persona Approach

This document discusses both approaches and describes when to use each.

#### Option 1: Persona Relationship Approach

The Persona Relationship Approach is recommended when there is a way to identify the primary identity (PI). The PI is the keystone identity and it may be automatically created via the HR aggregation process for user types sourced from HR, such as employees. For user types not sourced from HR, such as student accounts and contingent work force, the primary identity can be created by IdentityIQ via a self-service request/approval workflow.

Regardless of creation strategy, the primary Identity Cube (PI) is named (identity.name property) with an employee. This may be referred to as an "employee ID," "enterprise ID," or similar, and represents a unique employee

numbering convention (likely presented by the HR system). In this example, the enterprise ID consists of letters + 4 random numbers (APN1056).

Secondary identities (or child identities, known as CIs)) can be created via a custom self-service request/approval workflow and then linked to the PI as a CI. In addition, CIs may be created based on the presence of additional application accounts detected during aggregation. In this mechanism, accounts are correlated to the PI but are aggregated with a flag that specifies they should be attached to a CI (whether it exists or not). This business logic is implementation-specific. However, one example could be "if an LDAP account is a member of the professor group, the LDAP account should be placed on a professor persona Identity Cube." When the CI is created (in this case a student), it is linked back to the PI, and the PI link to all known CIs is updated as well. In certain scenarios (i.e. no PI exists), business logic should handle PI creation in lieu of CI creation.

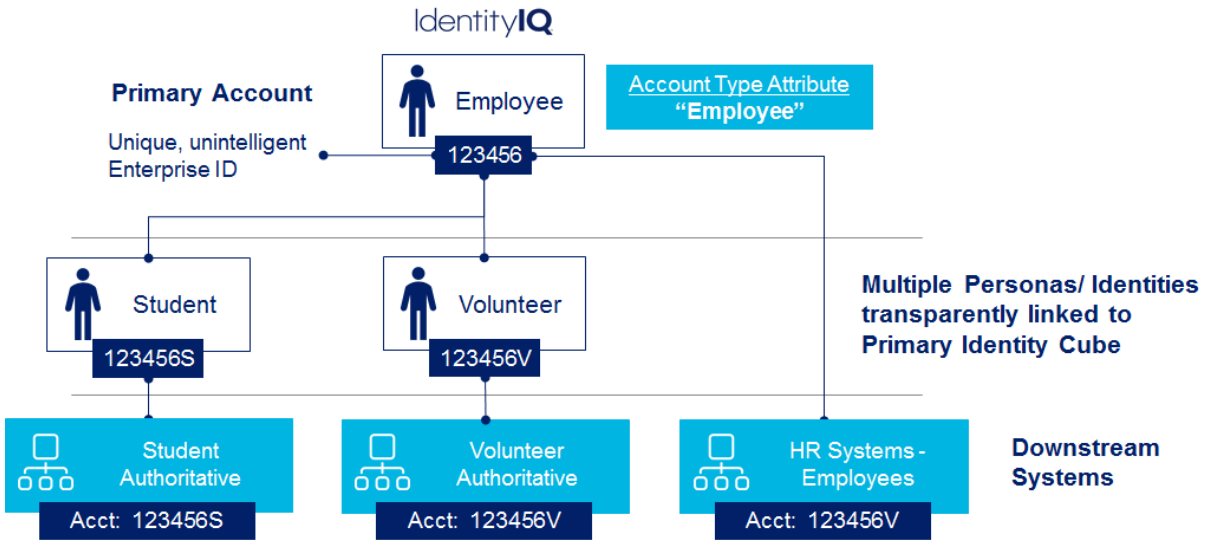
For example, a person who has a primary identity of Employee can have other personas such as Student and Volunteer. These would become the child identities. If three total personas are required, that would result in one Primary Identity and 2 Child Identities.

### Example Scenario

	Primary Persona (PI)	Secondary Persona (CI)	Secondary Persona (CI)
Identity Name	APN1956	APN1956P	APN1956V
Identity Type	Main	Secondary	Secondary
Display Name	Aaron P. Nichols	Aaron P. Nichols	Aaron P. Nichols
Account Type	Employee	Professor	Volunteer
Child Personas (List<String)	APN1956S APN1956V	<null>	<null>
Parent Persona	<null>	APN1956	APN1956

The PI contains a list of child personas that represent any additional personas, such as Student and Volunteer. In this example, CI names have the same base name of the PI, plus a 1 letter suffix (S=Student, V=Volunteer). A more complex suffix may be appropriate for real deployments of a persona model. Identity Cube naming fields such as first name, last name, and employee ID on a PI match on all related CIs. Other non-naming fields may differ, such as department, title and manager.

Below is an example of the persona hierarchy:



Pictured below is an example of identity Aaron P. Nichols, who has 3 personas. The screenshot is edited to show all three Identity Cube detail pages side-by-side.

**Identities**

User Name	First Name	Last Name	Identity Type	Account Type	Date Of Birth	Expiration Date	Manager	Display Name	SSN	Inactive	Employee ID
APN1956	Aaron	Nichols	Primary	Employee	12/31/1987		Lisa Rodriguez	Aaron P Nichols	023567939	False	%
APN1956S	Aaron	Nichols	Secondary	Student	12/31/1987	12/31/2015	Douglas Flores	Aaron P Nichols - Student	023567939	False	%
APN1956V	Aaron	Nichols	Secondary	Volunteer	12/31/1987	06/15/2015	Timothy Jetson	Aaron P Nichols - Volunteer	023567939	False	%

**View Identity Aaron P. Nichols**

**View Identity Aaron P. Nichols - Student**

Attributes	Entitlements	Application Accounts
User Name	APN1956S	
First Name	Aaron	
Last Name	Nichols	
Secondary Accounts	APN1956S APN1956V	
Parent		
Manager	Lisa Rodriguez	
Identity Type	Primary	
Account Type	Employee	
Date Of Birth	12/31/1987	
Expiration Date		

**View Identity Aaron P. Nichols - Volunteer**

Attributes	Entitlements	Application Accounts	Policy
User Name	APN1956V		
First Name	Aaron		
Last Name	Nichols		
Secondary Accounts			
Parent	APN1956		
Manager	Timothy Jetson		
Identity Type	Secondary		
Account Type	Volunteer		
Date Of Birth	12/31/1987		
Expiration Date	06/15/2015		

All CIs associated to a PI are managed using the custom "Secondary Account Request/Management" interface (example shown below).

**Secondary Account Request/Management**

**Carbon Account**

User:	APN1956	Display Name:	Aaron P. Nichols
Enterprise Id:	APN1956	Account Type:	Employee
First Name:	Aaron	Last Name:	Nichols
Employee ID:	1c	Email:	Aaron.Nichols@training.sailpoint2.com
Division:	CTX	Department:	Executive Management
Title:	Operations Manager Senior	Location:	Scott & White Clinic
Manager:	<input type="text" value="Lisa Rodriguez"/>		

---

**Secondary Account Info**

Business Unit*	<input type="text"/>	Department*	<input type="text"/>
Facility	<input type="text"/>	Department Id	<input type="text"/>
Job Title*	<input type="text"/>	Location*	<input type="text"/>
Job Code	<input type="text"/>	Account Type:	<input type="text"/>
Sponsor/Manager*	<input type="text"/>	Effective Date*	<input type="text" value="06/09/15"/> <input type="button" value="🗑️"/>

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**Current Access**

<b>Carbon Account</b>	
HR_Employees	1c
Active Directory	APN1956
<b>Student Account</b>	<a href="#">Manage Account</a> <a href="#">View Identity</a>
Active Directory	APN1956S
<b>Volunteer Account</b>	<a href="#">Manage Account</a> <a href="#">View Identity</a>
Active Directory	(Disabled) APN1956V

\* Indicates required field

### Joiner/Mover/Leaver

If the PI is terminated, the CIs are not automatically terminated. For example, if the PI is an employee and the child identity is a student, the individual could leave the organization but remain as a student. In this scenario, the student CI would be unlinked from the current PI and then promoted to the PI position.

If the employee is then rehired or converted to contingent workforce, the student account is demoted and linked to the new PI. For example, the employee comes back as a contractor but is still a student. Such promotion and demotion would be automated, handled via a mover workflow. Conversely, CIs can be removed without impacting the PI. Roles and access are independently granted and approved to the child identities.

Per the normal functionality of Identity Cubes, there is no automatic inheritance or automatic linking from the PI to associated CIs – such work must be done via scripting and workflows. However, attribute inheritance, such as employee ID, can be configured in a custom configuration object and defined in a custom attribute key, as illustrated below.

Personas Attribute Inheritance

Select what Identity Attributes will be inherited from the Main Identity  
i.e. Employee Id, First Name, Last Name, Display Name

Attribute To Inherit

- Expiration Date
- Location
- First Name
- Last Name**
- Employee Id

Location [X]

First Name [X]

Show Less...

Cancel Save

### Attachments

Please see below for attached artifacts that may be used to implement this approach.

### Option 2: Linked Relationship Personas Approach

The Linked Relationship Persona Approach is the recommended approach if there are multiple authoritative sources with each being the authority for a different identity persona. An identity instance might be sourced from multiple authoritative sources—each source adding additional attributes pertaining to that persona. With this approach, there is no concept of multiple target accounts or personas. Instead, everything is tied to one person via a "PersonID," which is the global identifier and is used to build a single Identity Cube. These personas will appear in IdentityIQ as an application account and will require special naming. They are then transparently linked back to the main Identity Cube via the Person ID value. This model not only builds the relationship but also shows all accesses in one uniform way in IdentityIQ.

In the example illustrated here, the PersonID consists of a unique, unintelligent Enterprise ID (123456). There are three additional personas, each of which consist of their own unique account details. However, everything is linked back to the Primary Identity Cube.

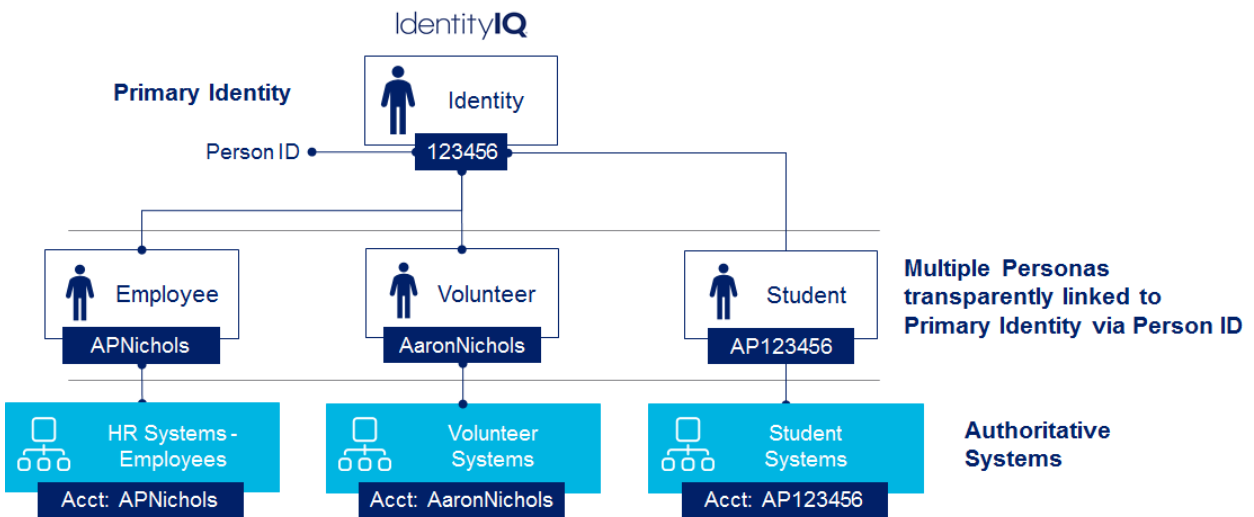
### Example Scenario

	Main Identity	Persona 1	Persona 2	Persona 3
Person ID	123456	123456	123456	123456
Employee ID	123456	AP123456	AaronNichols	APNichols

Display Name	Aaron P. Nichols	Aaron P. Nichols	Aaron P. Nichols	Aaron P. Nichols
Application Account	Person	Student Authoritative	Volunteer Authoritative	HR System - Employees

In this scenario, there are three application accounts tied back to the Main Identity, called "Person" here. Each application account will have its own unique Employee ID. Other non-name fields may differ such as department, title, and manager.

Below is an example of the persona hierarchy:

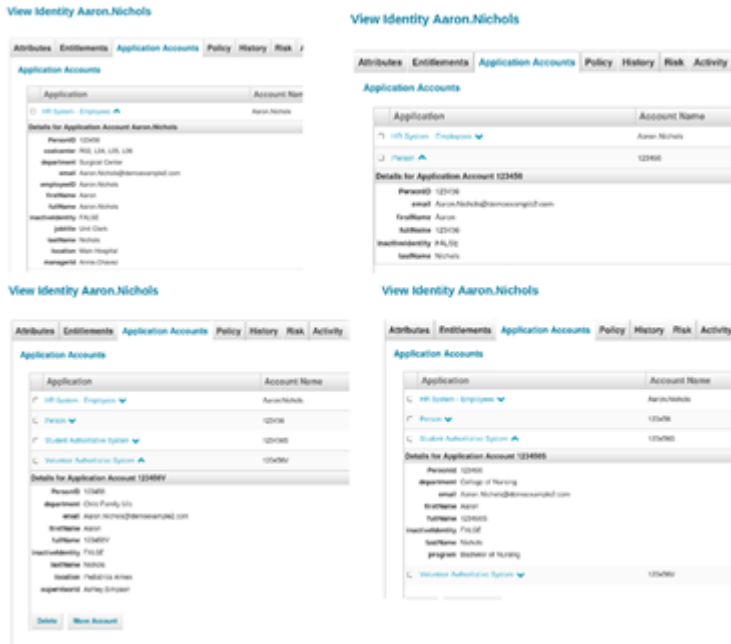


Pictured below is an example of identity Aaron P. Nichols, who has three personas. All accounts are shown within one identity.

View Identity Aaron.Nichols

Application	Account Name	Status	Last Refresh
HR System - Employees	Aaron.Nichols	Active	Feb 28, 2017
Person	123456	Active	Feb 27, 2017
Student Authoritative System	123456S	Active	Feb 27, 2017
Volunteer Authoritative System	123456V	Active	Feb 28, 2017

Personas can have different login IDs, and all personas associated with an identity are easily viewable. However, personas appear in IdentityIQ as an application account and require special naming. The below screenshot shows the details for each application account within this identity.



### Joiner/Mover/Leaver

Since each persona has its own Identity Cube, the others are not impacted when one persona leaves the organization and the others remain. For example, if the individual completes his studies and leaves the organization as a student, the other personas would remain.

healthcare Add tags  
personas

### Attachments

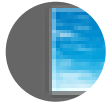
- Workflow-Custom-LCMSecondaryAccountRequestManagement.xml.zip
- 1\_SP\_GlobalConfigParams\_Custom.xml.zip
- 1\_Workflow-Custom-AddContingentWorkers.xml.zip
- Workflow-Custom-CreateSingleContingentWorker.xml.zip
- SP\_Joiner\_RulesLibrary.xml.zip
- SP\_LCE\_Joiner\_WF.xml.zip
- SP\_LCM\_RulesLibrary.xml.zip
- SP\_LCE\_Mover\_WF.xml.zip

26 Kudos



## Comment

## COMMENTS



hcharlebois

Aug 12, 201

Is there a version requirement for the solution?

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rose\_cobb

Aug 19, 201

@hcharlebois This document is not version specific, but it has not been tried on anything lower than IdentityIQ 7.0.

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asifa

Jan 13, 202

Is there a way to handle multiple persona where each can have a different manager associated with them and has impact on approval workflows associated with that persona? Thanks in advance.

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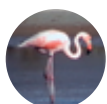


Sandman

Mar 17, 202

Suggestion, make the screenshot of IIQ less blurry

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msherriff

Mar 30, 2020 05:02 PM

My organization is just starting with multiple personal management and is it possible to delete both the PI and CI simultaneously?


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