Introduction to Zerion Identity Management

ACADEMY

March 2, 2017

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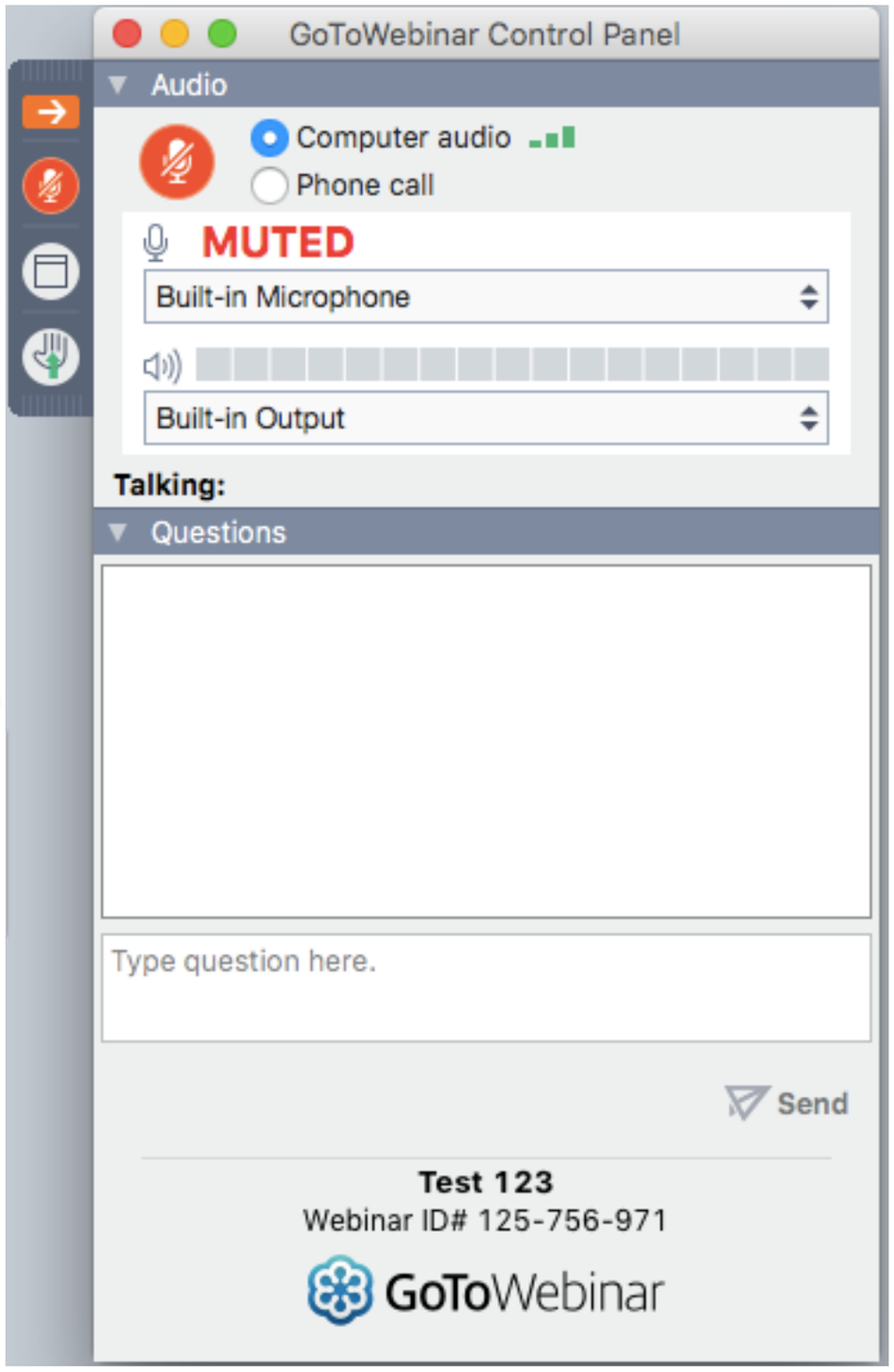

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Announcements

News & Updates

Release of Zerion Academy

Form Builder Certification
April 4, 5 and 6; 10:00 AM - 12:00 PM EST

Upcoming Webinars

3/16/17 Zerion Spotlight on Customer Solutions

3/29/17 Getting Started with Data Integrations

4/11/17 Setting Up Real-Time Dashboards

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About the Webinar

Presenter:
Berit Johannessen

An Introduction to Zerion Identity Management

- Zerion Identity Management, what is it?
- What is it made up of?
- How do I use it?

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Zerion Identity Management

What is it?

What is it made of?

How do I use it?

Allows organizations the ability to
- **securely** control
- individual or group of user's **identity**
- **access** levels
- in **Zerion Web Services**

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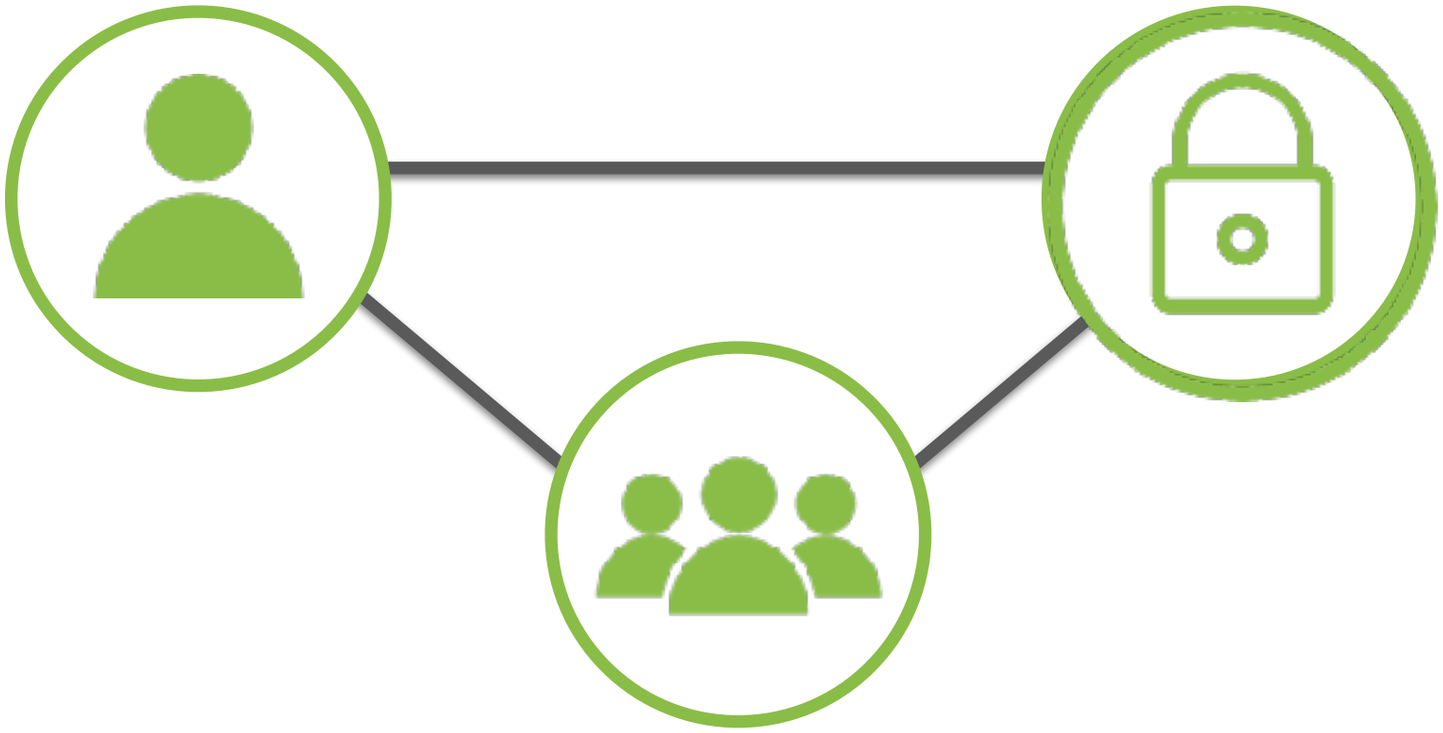
Zerion Identity Management

What is it?

What is it made of?

3 Key Components
- **Users**
- **Groups**
- **Policies**

How do I use it?



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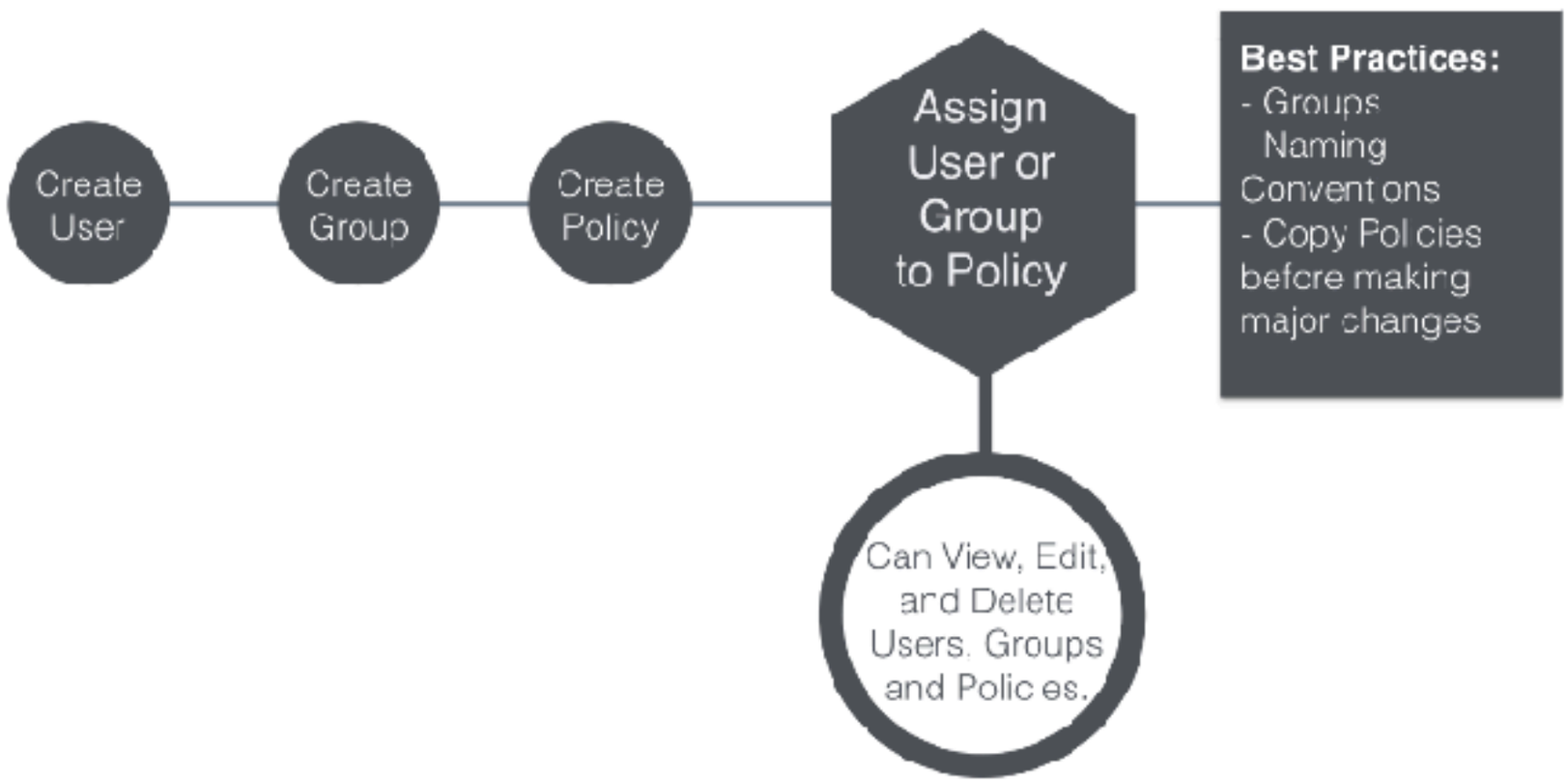
Zerion Identity Management

What is it?

What is it made of?

How do I use it?

- Must have access to ZIM in Zerion
- Set-up process can change based on preferences
- Can create, edit or delete Users, Groups and Policies in an order



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User Management ABC's

A User is a single Zerion entity and are not meant to be shared.

Admin creates new user, downloads new user Recovery Code file and shares file with new user.

As an admin, securely adding users to Zerion includes creating a new user and sharing the username and Recovery Code file (downloaded during user creation step) with the new user. ***PLEASE NOTE****:This Recovery Code is the ONLY way to login for the user if they do not have the password it and can not be retrieved later.*

By use of the password Recovery Code, the new user Resets and creates a new password.

The new user must then click the "Reset Password" button to create a new password using the Recovery Code from the admin.

Connect user to a Group or Policy.

By default, each user you create starts without access to any of the Zerion Services.

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Groups

Groups are logical containers for Users. A User may belong to multiple Groups.

Groups are used to create a scalable solution for identity+access management.

Some common Group Naming Conventions include:

- Zerion Policy Name
- Job Title
- Responsibility
- Project
- Organization
- Temporary Grouping

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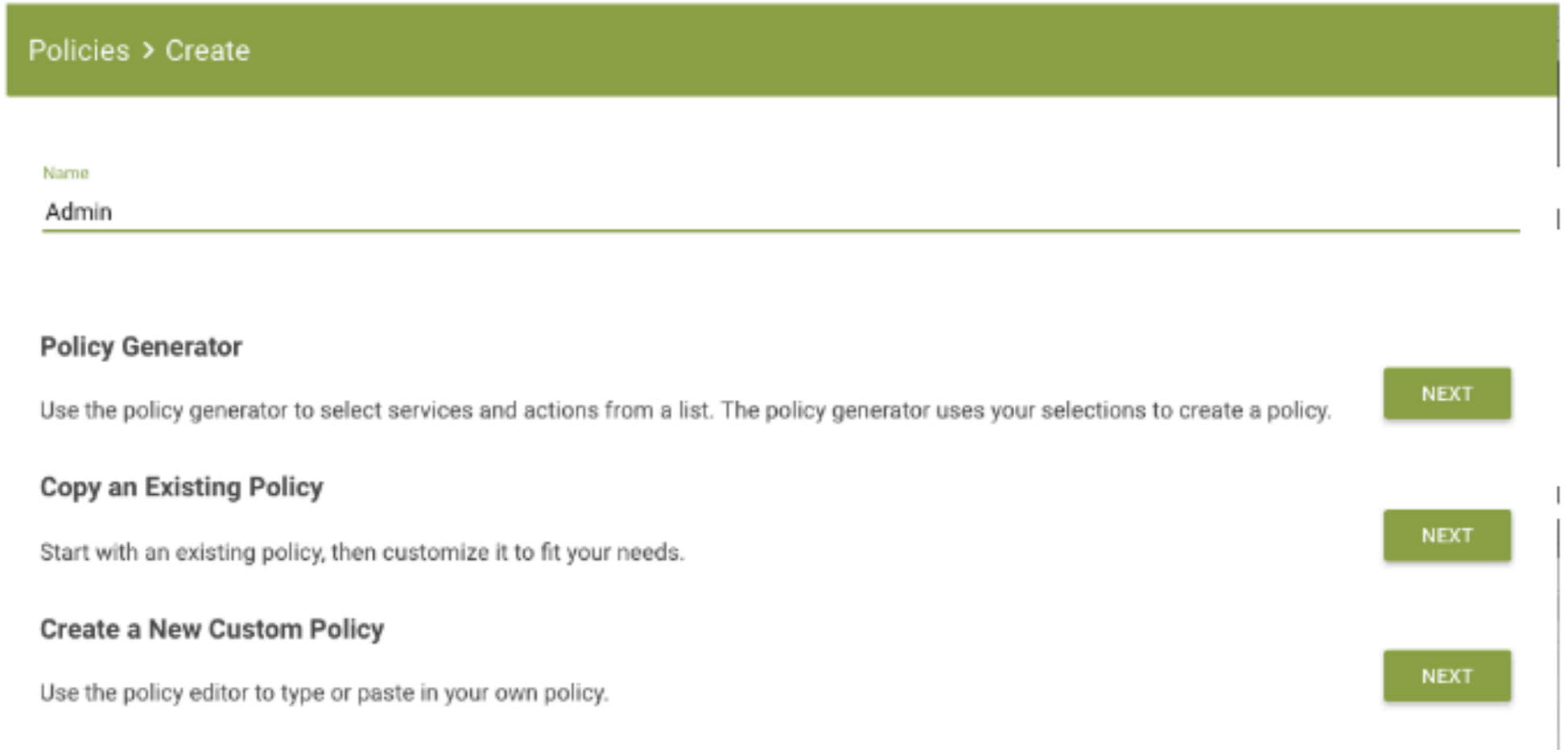
Policies

What are Policies Made up of?

ZIM Policies are made up of individual permissions. Each permission in a policy states whether an **action** is **allowed or denied** within a Zerion **Service**. Policies must specify what **resource(s)** in a service (like only a specific Dataflow or maybe all Dataflows) that access is allowed or denied to.



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Policies

Policies › Create

Name

Admin

Policy Generator

The Policy Generator is recommended for when you're getting started. By using the Generator, you'll be able to select specific services and actions from a pre-generated list. The tool uses your selection to create a policy. Think of it as an automated policy creating tool!

Copy an Existing Policy

If you already have existing policies created in ZIM, the copy option allows you to start with that existing policy as a template, and to make changes to create a new policy.

Create a New Custom Policy

Creating a new custom policy is recommended only for users who are familiar with the system and who have mastered policy creation. This option allows you to start from scratch while typing or pasting in your own policies.

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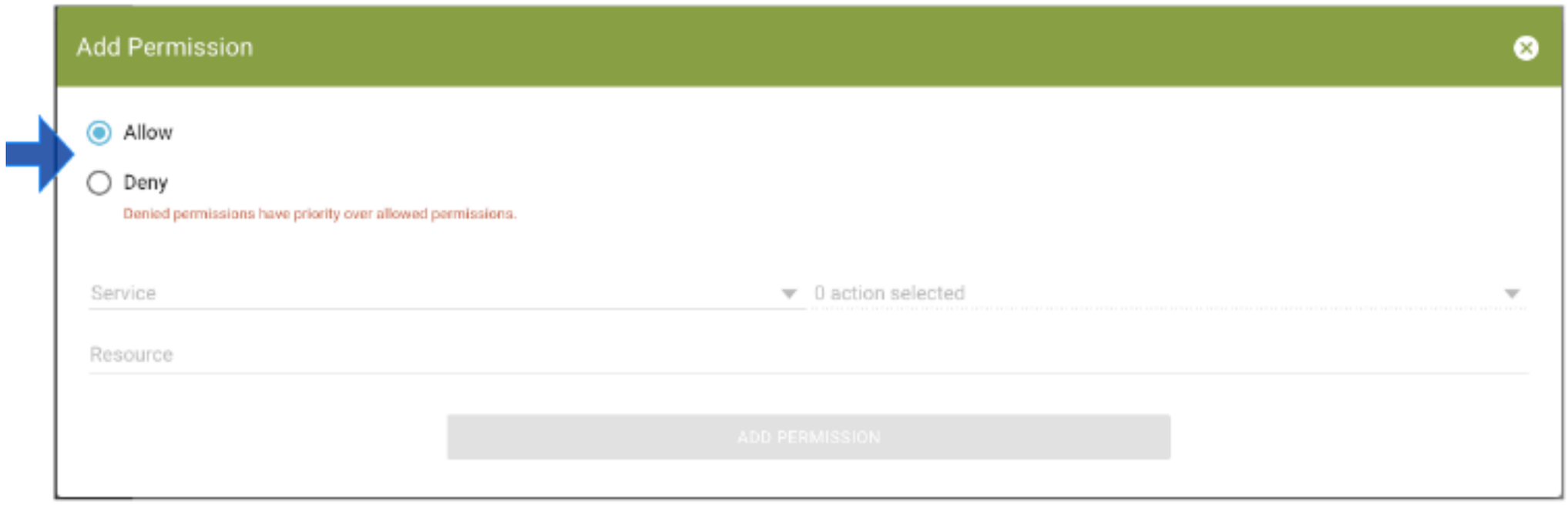
Policies



Allow or Deny: *Do you want your policy to allow or deny actions in a Zerion Service?*

Most often you will probably find yourself creating policies that allow actions to occur within Zerion services. However, there may come a time that you want to restrict an action from a user or group that may be in another policy they are associated with. By creating a policy with the "Deny" selected, this will override all other permissions that may be allowing the action.

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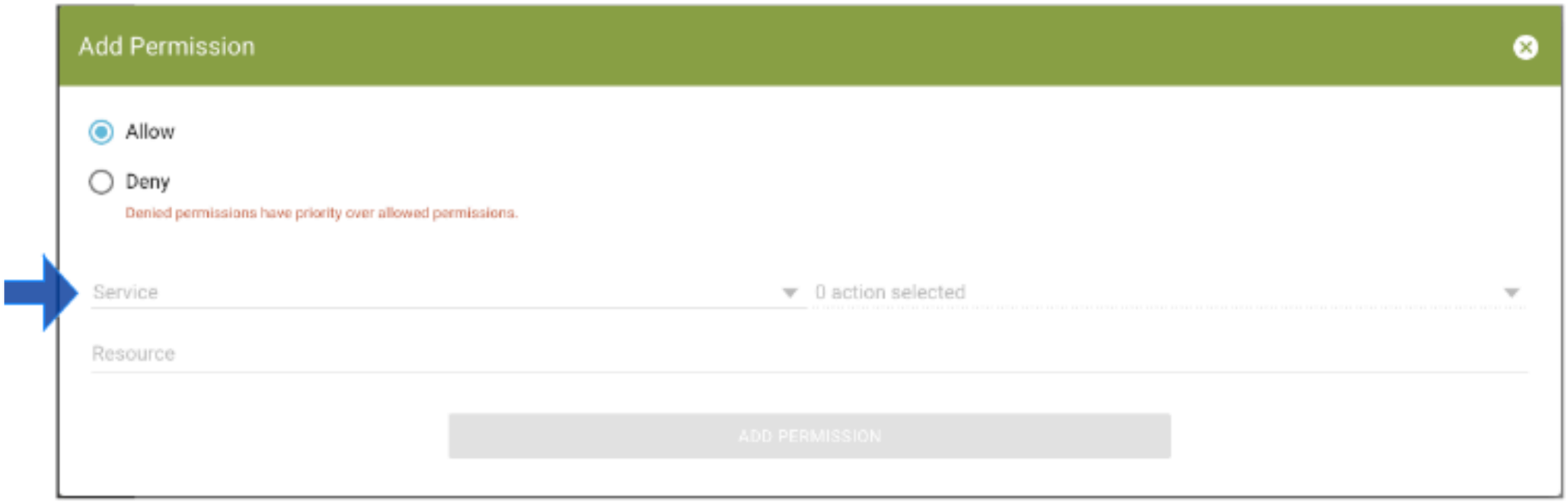
Policies



Service: *Which of the Zerion Services are you specifying permissions for?*

When adding permissions to a policy, you need to acknowledge which of the Zerion Services it applies to. A policy can incorporate permissions for multiple Zerion Services. Once a permissions has been created you can click the +Add button to create more for the policy.

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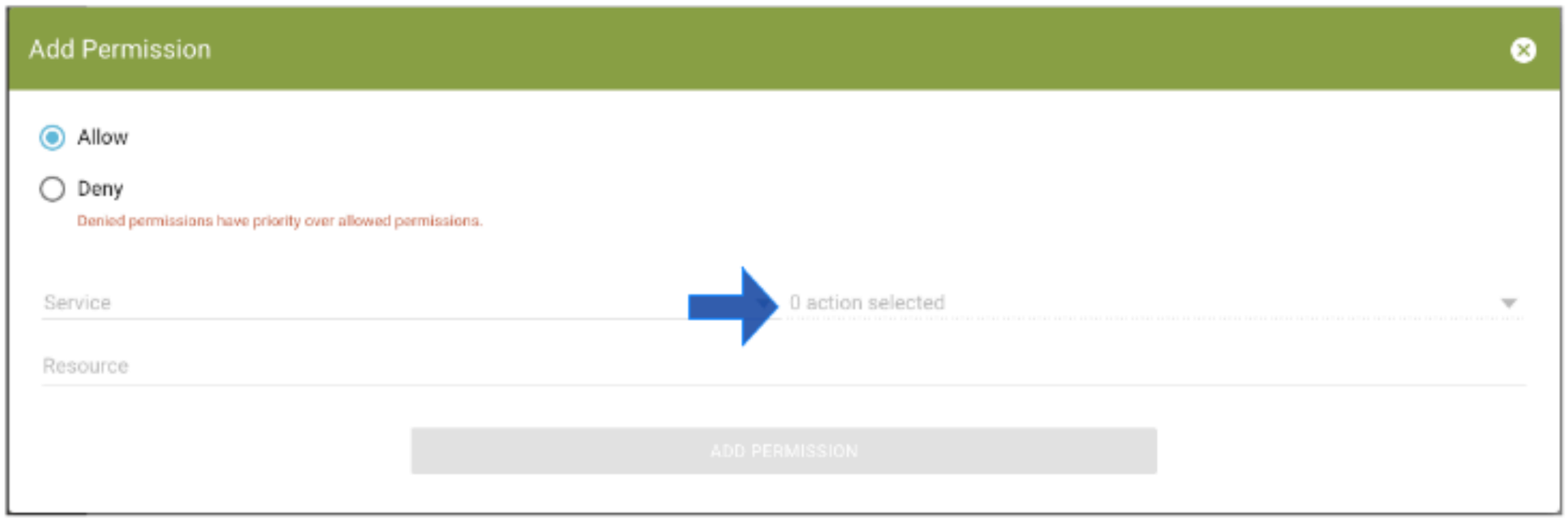
Policies



Actions *What actions in a Zerion Service will be accessible?*

Each service has its own set of defined actions. Only the actions available for the service selected will be displayed in a dropdown list.

Example: With the ZIM actions, you could develop a policy with permissions to List Users, Update Users, List User Groups, Create User Groups and Update User Groups but not give any of the other actions. Without further permissions to other Zerion Services or actions, this policy would ONLY allow access to ZIM and to those actions within the Zerion Console.

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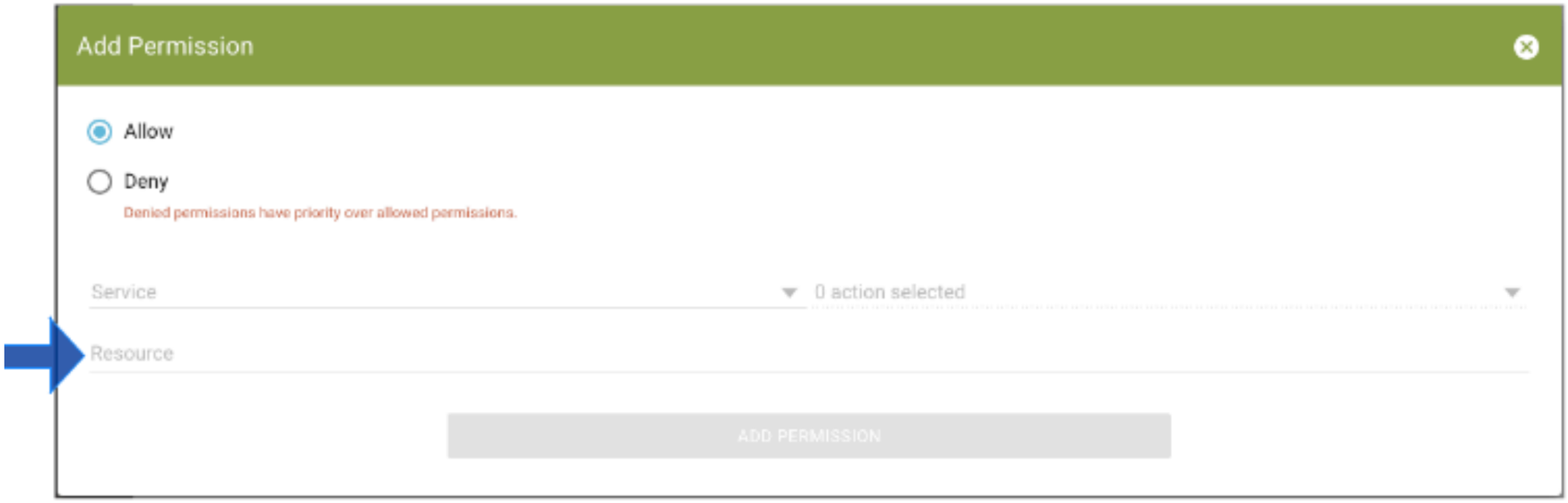
Policies



Resource: *Does your policy need to allow or deny access to all of the resources in a Zerion Service or do you need to identify access to specific resources only?*

Policies must explicitly identify which resources to grant permissions. A resource can be specific users, groups, policies and dataflows or it can be a general statement that covers all resources in a service. To start, you may find yourself building policies that grant access to all resources in a service and your resource text will look something like: zws::servers::account::*. Where it says "account" you will type in your Zerion Account name. This resource text acknowledges that the permission grants access to all of the resources (users, groups,policies, dataflows) for the actions selected. .

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THANK YOU

In 48 hours, you will receive an email with access to:

- Recording of Session
- Session PDF

Next Webinar

Building Solutions with Zerion
(3-Part Series)

February 14-16, 2017

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