TOOLS4EVER

Business Consultancy

Identity Management Business Integration
and Process Optimisation

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Introduction

Tools4ever is a Dutch software company and market leader in the field of Identity & Access Management (IAM). Since 1999, Tools4ever has been helping organisations to efficiently and securely manage their users and authorisations. Tools4ever develops software for both small companies with about 300 employees and large multinationals with more than 200,000 users. Nowadays, more than 5,000 clients, accounting for at least 10 million users, rely on Tools4ever's IAM solutions.

Tools4ever business consultants assist with various consultancy services:

- Every HelloID rollout project includes a standard Business Consultancy workshop. During this workshop, the design of the solution is fine-tuned based on the specific client environment. We also provide step-by-step plans which enable the organisation to design user roles, business rules and self-service flows by themselves.

- Additionally, our business consultants can offer more extensive support by helping clients with Identity Management adoption within the organisation. For example, we can assist clients in developing a role-based model and automating exceptions, including through smart role mining. We can also guide our clients in achieving compliance with legislation and regulations.

Provisioning workshop

HelloID Provisioning establishes a connection between the HR system and the user accounts in the network. This automates the identity lifecycle processes and ensures that changes are processed quickly, error-free and efficiently. Our business consultants prepare the rollout of HelloID Provisioning using a targeted and pragmatic Business Consultancy workshop.

This workshop takes half a day and is conducted by an experienced consultant using a clear checklist. It is crucial for all relevant experts from the client's side to participate: functional administrator(s) (HelloID, AD, HR), an HR specialist and a Security Expert. Together we take stock of the Identity Management processes, rights management, the touchpoints with the HelloID platform and the data exchange with existing systems.

Results

During the workshop, we collectively work on the following subjects:

- Definition of the source data. The HR system provides raw data for the account management processes. As part of the design, it must be clearly established at what point what data from the source system are used.

- We discuss the client-specific implementation of the desired identity management processes, including all timing aspects surrounding onboarding and offboarding and exceptions (if any).

- HelloID provides what is called 'role-based authorisation control'. The solution automatically manages someone's rights (permissions) based on their role in the organisation and does this through the use of business rules. During the workshop, we elaborate on best practices for the client within their specific market. Following a clear step-by-step plan, the client's team can then define roles and business rules themselves.

Next steps

Tools4ever business consultants assist with various consultancy services:

- The workshop provides the foundation for the definitive rollout project, including a design for the solution and a connector overview. The implementation consultant checks the output and thus prepares the further project activities.

- Furthermore, the workshop gives the client's project staff all input required to set up the role-based model and associated business rules themselves. If desired, Tools4ever business consultants can further support the client as part of an additional business consultancy project.

Service Automation workshop

In addition to automating the onboarding, transitioning and offboarding processes, clients can easily use HelloID Service Automation to automate the remaining identity management processes and specials such as guest accounts. With our self-service portal and tools to, among others, easily develop online forms and process flows, tasks can be pushed 'down the line' to team managers or to the employees themselves. Such a 'shift left' approach ensures that management specialists can increasingly focus on complex management tasks and new functionalities.

With a short additional Business Consultancy workshop lasting two to four hours, we prepare for the rollout of Service Automation. We also provide the client organisation with the necessary information and tools to implement automated management processes themselves.

Results

The Service Automation workshop focuses on the management processes for which the client wants to prioritise automation. These can range from self-service requests for access to applications with online approval by the relevant manager(s), to extensive portal solutions where service desk employees can manage an Active Directory without extensive domain admin rights.

Based on these client preferences, the workshop prepares the rollout of Service Automation and teaches the client best practices for using Service Automation to create these workflows and develop corresponding online forms.

Next steps

The workshop lays the foundation for the rollout of the Service Automation feature and provides the client with the tools to further tackle process automation themselves:

- The workshop provides the basis for the definitive rollout project, including a design for the solution and an overview of self-service tasks, workflows and (delegated) forms. The implementation consultant checks the output and thus prepares the further project activities.

- In addition, the workshop offers the client's project workers the tools to automate management tasks themselves, using standard self-service workflows and delegated forms. If desired, Tools4ever business consultants can further assist the client as part of an additional business consultancy project.

Business Consultancy: implementation and expansion

Furthermore, we can also assist your organisation with a broader rollout and more extensive support for Identity Management. Our business consultants have years of experience, are familiar with various markets and have a deep understanding of the challenges. Tools4ever also has a network of consultancy firms that have extensive knowledge of our solutions and that further support our clients with the HelloID adoption activities. Below we have listed a few examples of issues that Tools4ever and our partners support clients with.

Smart role mining

We do not have any sort of role-based model yet. We started working on it at one point, but had to stop because of the many exceptions. With our current staffing, we will not manage. How do we approach this?

For organisations that do not yet have a role-based model, we use the unique combination of HR and user network data provided by HelloID to conduct role mining to inventory the different roles within an organisation. This allows us to visualise how these can be automatically distributed, or whether they would be better set up as requestable roles. By applying role mining, it is possible to establish a role-based model quickly and with minimal effort. Role mining has several pitfalls, such as modelling existing contamination in the network. Our experts have experience with these and know how to prevent issues.
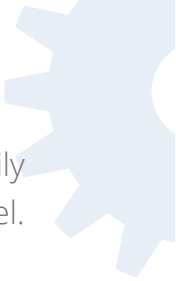
Manageable role-based model

The authorisation matrix is too complex or no longer manageable. My authorisation matrix is too large, and by the time I have figured everything out, the rights have already changed.

Our phased approach works based on a 'managed by' principle, which greatly limits the risks. It ensures that the benefits of an automated role-based model can be realised quickly and remain manageable. It is not necessary to have all rights figured out. What we know can already be used, without any loss of rights.

Automation of exceptions

Why can't I reach an agreement with the business on the rights to be automated? Why are there so many exceptions to the rights that users have?

Having numerous exceptions makes it difficult to establish a standard role-based model. The question is whether you should try to formalise the exceptions. That is of course possible, but we also offer an interesting alternative by delegating the exceptions to the managers and employees. We do this while having a number of safety measures in place, in

order to ensure that no security issues arise and that work processes are not unnecessarily hindered. Above all, this approach significantly simplies the creation of a role-based model.

Easily comply with laws and regulations

So far, we have successfully completed the IT audit every year. However, we notice that it is becoming increasingly difficult. How do we ensure that we remain compliant?

Indeed, audits are becoming more and more strict. Above all, employees are being used more flexibly within organisations. Sometimes employees have to temporarily carry out the duties of a colleague or have dual employment contracts, and departments and roles change regularly. Sometimes it is only known an hour in advance which tasks and with what scope (access to which customers/patients/citizens) a flexible employee or temporary worker will perform. Solid management of access rights is becoming increasingly important, and a generic account is no longer acceptable, especially now that compliance with laws and regulations is being more rigorously enforced. Compliance is not purely an IT issue but requires an integrated approach across multiple departments. Tools4ever is familiar with these challenges and offers various market-oriented solutions that align with best practices.

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