

ivanti



Identity Director

Integration with Workspace Control and Automation

Version 10.2.0.0

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Chapter 1: Introduction

In Ivanti Workspace Control and Ivanti Automation you can create new services in Ivanti Identity Director directly from the Consoles. This makes it easier to create and manage services.

- In Ivanti Workspace Control, you can use existing services in Ivanti Identity Director and create new ones, and use them as access principle for managed applications, printers and settings. This allows for self-servicing capabilities in the user workspace.
- In Ivanti Automation, you can publish Run Books as a service in Ivanti Identity Director.

Integration with Workspace Control requires Ivanti or RES ONE Workspace (Control) 10 (*any version*). Integration with Automation requires Ivanti or RES ONE Automation 10 (*any version*).

Integration

In order to configure this integration, you need to configure the following:

- **Ivanti Identity Director**
 - Service templates
 - Service publications
 - Ivanti Automation integration settings
- **Ivanti Workspace Control**
 - Ivanti Identity Director integration settings
 - Managed applications, printers and settings
- **Ivanti Automation**
 - Ivanti Identity Director integration settings
 - Run Books

The first step of the integration is to configure service templates. This is a pre-configured service that you can use in Ivanti Workspace Control and Ivanti Automation as a basis to create new services in Ivanti Identity Director. After you have configured service templates, you need to make them available in a service publication. This is a container in which you can specify the service templates and/or services that you want to be available for use in a specific Ivanti Workspace Control or Ivanti Automation environment.

More information

You can find more documentation at the Success Center (<http://success.res.com>), in the **Downloads** section:

- **Ivanti Identity Director Administration Guide:** This document provides detailed information about the installation and configuration of Ivanti Identity Director features and components. The online version is available at <http://help.res.com/IdentityDirectorAdminGuide10/>. Alternatively, you can download a PDF version at the Success Center.
- **Ivanti Automation Administration Guide:** This document provides detailed information about the installation and configuration of Ivanti Automation features and components. The online version is available at <http://help.res.com/AutomationAdminGuide10/>.

Chapter 2: Configure service templates

In the Management Portal, at **Service Category**, you can "convert" services to service templates. A service template is a pre-configured service that can be used in Ivanti Workspace Control and Ivanti Automation to create new services directly from their Consoles.

You can only convert a service to a template if:

- The service has no subscribers
- The service is not already part of a service publication
- The service is not referenced by other services as a qualification restriction or dependency or in their service attributes

New installations of Ivanti Identity Director contain the service category **Templates**. This category contains two default service templates:

- **Workspace Template:** Use this template in Ivanti Workspace Control to create new services from the Console.
- **Run Book Template:** Use this template in Ivanti Automation to publish Ivanti Automation Run Books as new services.

You can also convert existing services into new service templates.

To convert a service to a service template:

1. At **Service Catalog**, click the tile of the service that you want to convert to a template.
2. On the **Properties** tab of the service window, select **Use as template**.
 - If the service is currently unused, the options **Show in My Store**, **Show in Delegated Administration Panel** and **Enable transactions** is grayed out and no longer applies. You can only use service templates in service publications; they are no longer available in the Web Portal, and can no longer be referenced by other services.
 - If the service is currently in use, you need to duplicate the service first and create a template from the duplicate.
3. Make any changes to the configuration of the template.
 - If you configure a service template for Ivanti Automation, make sure the first action is an **Approve** workflow action. This provides extra security for new services. For example, if you use the template to create a service that invokes a Run Book to delete users in Active Directory, the **Approve** workflow action gives you the opportunity to cancel the service before the Run Book is executed.
4. Click **Save**.

Convert a template to a service again

- You can only convert a template to a service if it is not part of a service publication.
- To convert a template to a service again, clear **Use as template**. After this, you can make the service available again in the Web Portal and work with it as before.

Chapter 3: Configure service publications

When you have converted services to a template, you can make them available in a service publication. A service publication is a container in which you can specify the service templates and/or services that you want to be available for use in a specific Ivanti Workspace Control or Ivanti Automation environment. You can configure service publications at **Setup > Service Publications**.

A new Ivanti Identity Director environment contains two default service publications:

- **Ivanti Workspace Control:** This service publication contains the default **Workspace Template**, which you can use to create new services in Ivanti Identity Director and use them as access principle for applications, printers and other objects.
- **Ivanti Automation:** This service publication contains a default **Run Book Template**, which you can use to publish Run Books as a service in Ivanti Identity Director.

To configure new service publications:

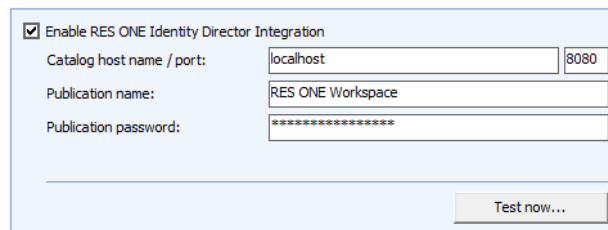
1. In the Management Portal, click **Setup > Service Publications**.
2. Click **Add**. This opens the **New service publication** page.
3. On the **Properties** tab, in the **Publication name** and **Password** fields specify the necessary credentials to connect to the service publication. You must also specify these in Ivanti Workspace Control and Ivanti Automation to be able to connect to the service publication.
4. In the **People Identifier** field, specify the people identifier that Ivanti Identity Director uses to identify users in Ivanti Workspace Control and Ivanti Automation when they work with the service publication (e.g. **Windows user account**).
5. On the **Published Services** tab, specify the available services in the service publication.
 - Click the plus sign to add services. You can only add services that have the option **Show in publications** selected (on the **Properties** tab of the service page).
6. On the **Published Templates** tab, specify the available templates in the service publication.
 - When you add templates, you can only select templates with the options **Use as template** and **Show in publications** selected (on the **Properties** tab of the service page).

Chapter 4: Integration with Ivanti Workspace Control

In Ivanti Workspace Control, you can use Ivanti Identity Director services as access principle for managed applications and objects like printers and settings. This restricts their access to users who are subscribed to a specific Ivanti Identity Director service. You can also create new Ivanti Identity Director services when you configure these items.

Ivanti Identity Director Integration

Before Ivanti Workspace Control can reference service templates in Ivanti Identity Director, you need to configure **Ivanti Identity Director Integration** in the Ivanti Workspace Control Console. You can configure this at **Setup > Integration > Ivanti Products > Identity Director**.

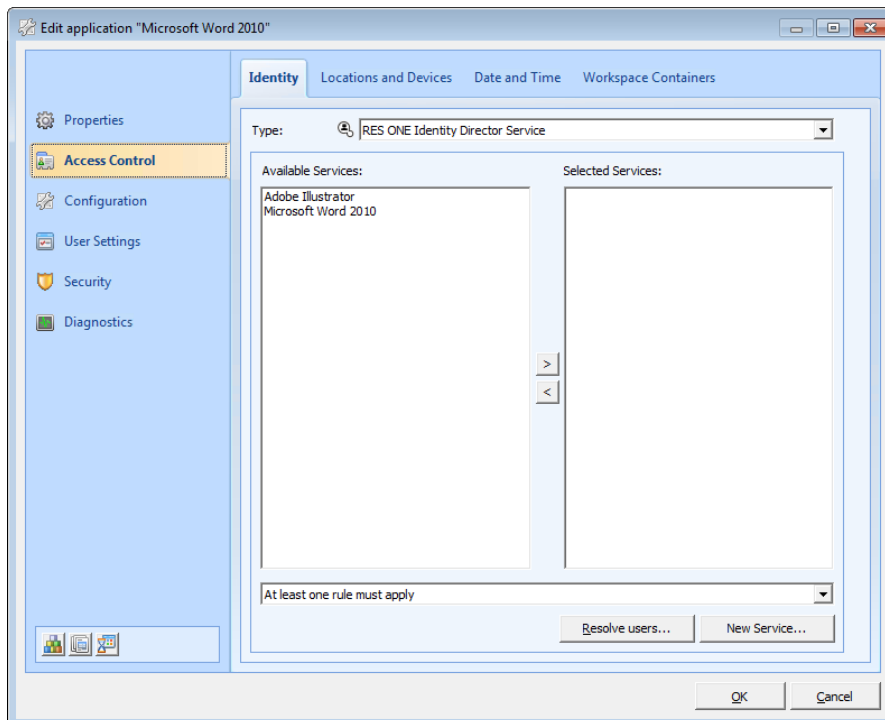


The screenshot shows a configuration form for enabling RES ONE Identity Director integration. It includes a checked checkbox for 'Enable RES ONE Identity Director Integration'. Below this are three input fields: 'Catalog host name / port' with 'localhost' and '8080', 'Publication name' with 'RES ONE Workspace', and 'Publication password' with a masked password '*****'. A 'Test now...' button is located at the bottom right of the form.

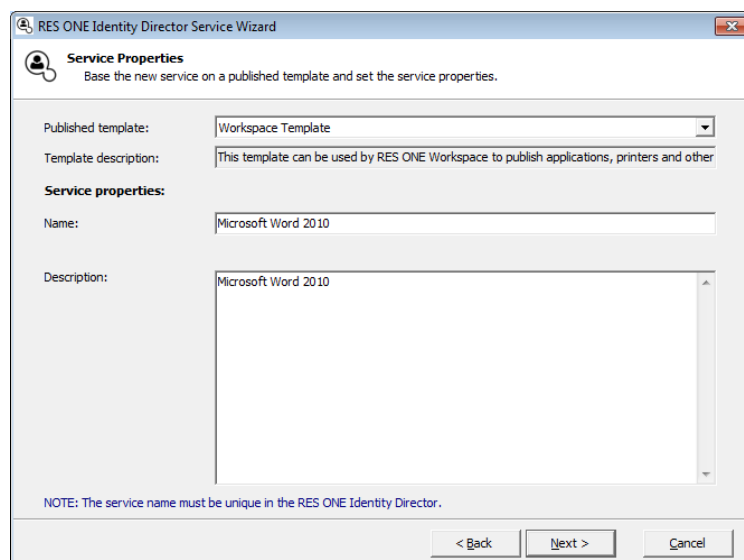
1. In the **Catalog host name / port** fields, specify the device on which the Catalog Services run. The Catalog Services are used by Ivanti Workspace Control to query which Ivanti Identity Director services have been delivered to a user. The default port is 8080.
2. In the **Publication name** field, specify the service publication that you want to use in Ivanti Workspace Control, for example the default service publication **Ivanti Workspace Control**.
3. In the **Publication password** field, specify a password if necessary.
4. Click **Test now** to test if you can connect to the specified Catalog host. If this is possible, an overview of all available Ivanti Identity Director services is shown.

Managed Applications

In the Ivanti Workspace Control Console at **Composition > Applications**, you can configure access control for a managed application on the tab **Access Control > Identity** of the **Edit application** window.



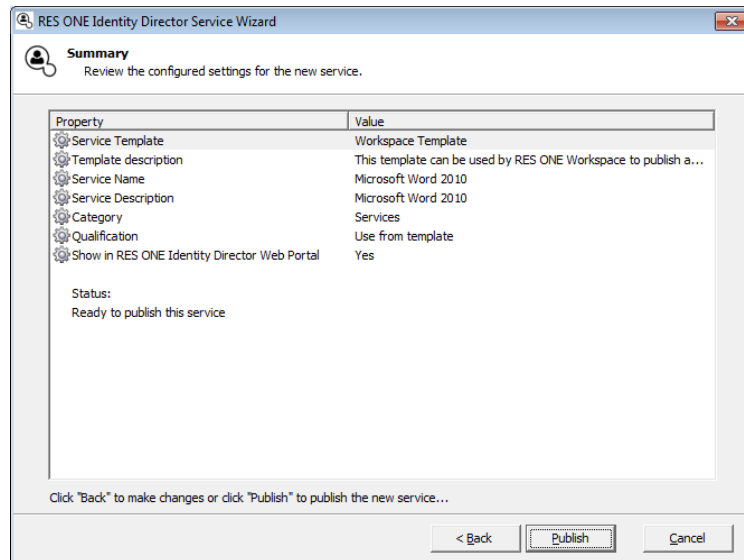
- To use an **existing** Ivanti Identity Director service as access principle, select it from the list of **Available Services**.
- To create a **new** Ivanti Identity Director service and use it as access principle, click **New Service**. The Ivanti Identity Director Service Wizard will help you create, customize and publish the new service. Access to the application will then be restricted to users who are subscribed to this service.



In the wizard, you can specify:

- The service template on which the new service will be based.
- The name of the new service.

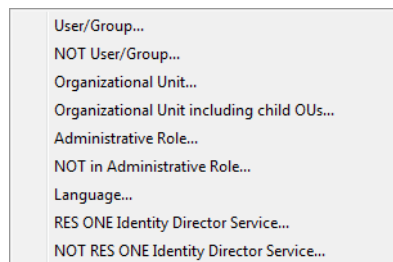
- The category in which the new service will be placed in the Ivanti Identity Director Management Portal.
- The qualification criteria to the new service.



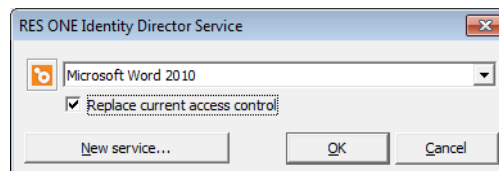
Objects

To use an Ivanti Identity Director service as an access principle in the Access Control settings of an object, edit the object in the Ivanti Workspace Control Console.

1. On the **Access Control** tab, click **Add** in the **Identity** area and select **Ivanti Identity Director Service**.



2. Next, choose an existing service as access principle or create a new one.



- To use an **existing** service, select it from the list.
 - Select **Replace current access control** to let the new service overrule the current Access Control rules.
 - Clear the option to add it to the list of Access Control rules for users/groups.
- To create a **new** service, click **New Service**.

If you choose to create a new service, the Ivanti Identity Director Service Wizard will start. This wizard helps you create, customize and publish a new service. Access to the object will then be restricted to users who subscribe to the new service.

Chapter 5: Integration with Ivanti Automation

In Ivanti Automation, you can publish Run Books as a service in Ivanti Identity Director.

Ivanti Automation Integration

Before Ivanti Automation can reference service templates in Ivanti Identity Director, you need to configure **Ivanti Automation Integration** in the Management Portal. By configuring Ivanti Automation Integration, you can use Ivanti Automation Run Books in the services in Ivanti Identity Director. The settings that you specify will be used by the Transaction Engine to connect to Ivanti Automation Dispatchers and invoke Run Books when necessary. You can configure Ivanti Automation Integration in the Management Portal at **Setup > Ivanti Automation**.

- When you specify the login account to connect to the Ivanti Automation environment, you only connect with a login account that uses **Ivanti Automation Authentication**. It is not possible to connect with a login account that uses **Microsoft Windows authentication** (typically used for Microsoft Windows user accounts).
- The login account may be subject to administrative roles of the Ivanti Automation environment: not all Run Books may be available, depending on permissions.

Ivanti Identity Director Integration

Before Ivanti Automation can create Ivanti Identity Director services, you need to configure **Ivanti Identity Director Integration** in the Ivanti Automation Console.

1. In the Ivanti Automation Console, click **Setup > Ivanti Identity Director**.
2. In the **Catalog host name / port** field, specify the device on which the Catalog Services run.
 - The Catalog Services are used by Ivanti Automation to query which Ivanti Identity Director services have been delivered to a user.
 - All communication of the Ivanti Identity Director Wizard to the Catalog Services is SSL-encrypted, using port 8081.
3. In the **Publication name** field, specify the service publication that you want to use in Ivanti Automation. For example, the default service publication **Ivanti Automation**.
4. In the **Publication password** field, specify a password if necessary.
5. Click **Test now** to test if you can connect to the specified Catalog host. If this is possible, an overview of all available Ivanti Identity Director services is shown.

As soon as you have enabled and validated the Ivanti Identity Director integration, you will receive 12 complimentary license points for Ivanti Identity Director in Ivanti Automation. The Ivanti Identity Director licenses are made available in the Ivanti Automation Console under the section **Connectors** in the **Licensing** overview, regardless of any other licenses that you may already have.

Run Books

When you have configured **Ivanti Identity Director Integration**, you can create new Ivanti Identity Director services from the **Run Books** node in the Ivanti Automation Console by using the **Ivanti Identity Director Service Wizard**. This wizard is only available if you have configured and enabled **Ivanti Identity Director Integration** AND your administrative role of the Ivanti Automation Console has **Modify** access to the **Run Books** node.

1. In the Ivanti Automation Console at **Library > Run Books**, right-click a Run Book and click **Publish in Ivanti Identity Director**. This opens the **Ivanti Identity Director Service Wizard**.
2. Follow the steps of the wizard.
 - **Template and Properties step:**
 - Select the template on which the new service will be based. You can configure new service templates in Ivanti Identity Director.
 - The name of the new service must be unique in the Ivanti Identity Director environment.
 - **Category step:**
 - Select the category in the Ivanti Identity Director service catalog in which the new service will be placed.
 - **Qualification step:**
 - Select the qualification criteria of the new service:
 - **Use from template:** The qualification criteria of the service template will be applied to the new service.
 - **Everyone qualifies:** Every person in the Ivanti Identity Director environment will qualify for the new service.
 - **Base on organizational context:** Select an organizational context item as qualification criterion. People must be classified in this item to qualify for the service.
 - **Summary step:**
 - Review all configured settings for the new service.
 - When you click **Create**, all settings will be validated and a new service will be created.

Upon completion of the Ivanti Identity Director Wizard, you can choose to launch the Ivanti Identity Director Management Portal. This option is only available if you installed the Ivanti Identity Director Management Portal on the same device as the Ivanti Automation Console.

When the new service is created in Ivanti Identity Director:

- Its delivery workflow contains as first action a **Provide Information** action, if any **Run Book** parameter asks for input. As last action, it contains an **Invoke Run Book** action with the selected Run Book.
- Service attributes will be automatically created and linked to the Run Book parameters (if any).
- An exception handler will be added with an **End Workflow** action "Failed to deliver".
- The service will be disabled by default, which allows you to fine-tune it before you make it available in the Ivanti Identity Director environment.