HP Propel

Software Version: 1.11
CentOS Operating System

Organizations Help

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Contents

Organizations

Concepts

An organization determines a member's entry point into the cloud system and associates its members with services and resources. An organization may be a company, business unit, department, or group. Membership in an organization is determined by the organization's LDAP (Lightweight Directory Access Protocol) directory. When a user logs in, LDAP authenticates the login credentials by verifying that the user name and password match an existing user in the LDAP directory.

At installation, a single consumer organization is set up. You can use the **Organizations** Administration User Interface (UI) to modify this default consumer organization, as needed.

Tasks

You can perform the following tasks in this UI:

- **Create an organization** - Click **Add New Organization**, and provide a name for the organization.

- **Navigate to an organization** - Click the tile name of the organization to which you want to navigate.

General Information

Concepts

Use this area to provide profile information about the organization so that it is easily recognizable to you and your team.

Tasks

Before you create a new organization, or edit your existing organization, you need to provide the following general information about your Organization:

Item	Description
Organization ID	A unique name that is assigned to the organization. For a consumer organization, this name is based on the name entered when the organization was created by the Administrator. The organization identifier is needed when launching the portal, and may also be needed when customizing the portal.
Organization Display Name	A unique name that identifies the organization.
Organization Description	A description of the organization.
Organization Picture URL	The URL for a picture that represents the organization.

Once you have this information, you can begin creating or editing an organization. For more information, see "Creating a New Organization".

Best Practices

The OrganizationsAdministrator can edit **Display Name**, **Description**, and **Picture URL** fields once an Organization is created. The **Edit Organization ID** check box below the **Organization ID** field allows the Administrator to change the Organization ID of an organization, which is the DN (distinguished name). This change will affect external applications, and it is not recommended.

Creating a New Organization

Concepts

Administrators can build New Organizations and customize the look and feel of the Organizations using Themes. Please note that the URL for the Organization is automatically assigned and generated using server location information and the name of the Organization to create the URL. Once generated, it is not editable.

Tasks

You can create a new organization or customize existing organizations using themes and security classifications and dashboard widgets:

- Create a New Organization

- Customize "Themes and Security Classifications"

- Customize "Dashboard Widgets"

Create a New Organization

1. Log in to the **Propel Management Console**.

2. Click the **Organizations** tile. The **Create and Manage Your Organizations** view opens and the current organizations in the system are shown.

3. Click the **Add New Organization** tile.

4. In the **Create Organization** window, type in your new **Organization Name**. The system will create a unique **Organization ID** based on your Organization Name, which is a unique identifier in Propel.

5. Once you are finished with the **Organization Name**, click **Create**.

6. Onscreen you will see a dialog page with five page links:
   - General Information

   - Authentication

   - Customization

   - Groups

   - Business Roles

1. The **General Information** view opens by default. Note that the **Organization Name** used to create the organization is now the **Organization Display Name**.

2. In this view, you will see that the **Organization ID** is grayed out, as it is uneditable by end users. This is the unique organization name used to identify your organization. Users will see it onscreen in external applications such as the MarketPlace Portal.

3. In this view, you can edit your **Organization Display Name**.

4. Enter a full description of your new **Organization** using 2,048 characters or less.

5. You can use a default image to represent the Organization, or you can use the **Organization Picture URL** field to input an image from any live URL. There is a limit of 1,024 characters to the **Organization Picture URL** field.

6. Once you are finished, click **Save**.

7. **NOTE**: if have not saved your last change while creating an organization, you will see a screen called **Unsaved Changes** appear. This feature allows you to **Return to Page** where you can edit and save your most recent changes, or **Discard Changes** to proceed to the **Authentication** section.

8. Set up LDAP authentication for your new Organization. You will set your LDAP attributes and privileges for members, groups, and other basic authentication information for integration with your organization.

9. Click the **Authentication** tab, and enter your LDAP information.

10. Click the **Customization** tab to customize the Organization.

11. When you are finished, click **Save**.

For more information on Authenticating and setting up LDAP, see the "Authentication" section.

For more information on Customizing Organizations, see the "Customization" section.

For more information on Managing Groups and Business Roles Organizations, see the Groups and Business Roles section.

Authentication

Concepts

You can configure and manage multiple LDAP identity servers for your organization. You can connect multiple LDAP servers by adding configurations and adjusting their relative priority within an organization.

LDAP is used to:

- Authenticate a user's login.

- Authenticate a user's access to information.

- Authorize a user's access to information.

To completely configure access to HP Propel, you must configure LDAP to authenticate a user's login, configure LDAP for an organization to authenticate a user's access to information, and configure access control for an organization to authorize a user's access to information.

From this area you can:

- Configure LDAP for authentication to log in to HP Propel.

- Configure LDAP to access information in HP Propel.

Tasks

To configure LDAP for an organization, provide or update the following information:

LDAP Server Information

Configure one or more LDAP servers and a user with access to the server.

Item	Description
Display Name	The display name for the LDAP server.
Hostname	The fully-qualified LDAP server domain name (server.domain.com) or IP address. Example: `ldap.xyz.com`
Port	The port used to connect to the LDAP server (by default, 389). Example: `389`
SSL Connection	If the LDAP server is configured to require ldaps (LDAP over SSL), select the **SSL Connection** checkbox.
Base DN	Base distinguished name. The Base DN is the top level of the LDAP directory that is used as the basis of a search. Example: `o=xyz.com`
User ID (Full DN)	The fully distinguished name of any user with authentication rights to the LDAP server. If the LDAP server does not require a User ID or password for authentication, this value can be omitted. Example: `uid=admin@xyz.com,ou=People,o=xyz.com`
Password	Password of the User ID. If the LDAP server does not require a User ID or password for authentication, this value can be omitted.

Item	Description
Retype Password	Retype the password of the User ID.

LDAP Attributes

Enter the names of the attributes whose values are used for email notifications, authentication, and approvals in HP Propel.

Item	Description
User Email	The name of the attribute of a user object that designates the email address of the user. The email address is used for notifications. If a value for this attribute does not exist for a user, the user does not receive email notifications. Default: `mail`
Group Membership	The name of the attribute(s) of a group object that identifies a user as belonging to the group. If multiple attributes convey group membership, the attribute names should be separated by a comma. Default: `member,uniqueMember`
Manager Identifier	The name of the attribute of a user object that identifies the manager of the user. Default: `manager`
Manager Identifier Value	The name of the attribute of a user object that describes the value of the Manager Identifier's attribute. For example, if the value of the Manager Identifier attribute is a distinguished name (such as `cn=John Smith, ou=People, o=xyz.com`) then the value of this field could be `dn` (distinguished name). Or, if the Manager Identifier is an email address (such as `admin@xyz.com`) then the value of this field could be `email`. Default: `dn`
User Avatar	LDAP attribute whose value is the URL to a user avatar image that will display for the logged in user portal. If no avatar is specified, a default avatar will be used.

User Login Settings

A user search-based login method is used to authenticate access to information.

Item	Description
User Name Attributes	The name of the attribute of a user object that contains the username that will be used to log in. The value for this field can be determined by looking at one or more user objects in the LDAP directory to determine which attribute consistently contains a unique user name. Often, you will want a **User Name Attribute** whose value in a user object is an email address. Examples: `userPrincipalName` or `sAMAccountName` or `uid`
User Searchbase	The location in the LDAP directory where users' records are located. This location should be specified relative to the Base DN. If users are not located in a common directory under the Base DN, leave this field blank. Examples: `cn=Users` or `ou=People`
User Search Filter	Specifies the general form of the LDAP query used to identify users during login. It must include the pattern `{0}`, which represents the user name entered by the user when logging in. The filter is generally of the form `<attribute>= 0}`, with `<attribute>` typically corresponding to the value entered for **User Name Attribute**. Examples: `userPrincipalName={0}` or `sAMAccountName={0}` or `uid={0}`
Search Option (Search Subtree)	When a user logs in, the LDAP directory is queried to find the user's account. The **Search Subtree** setting controls the depth of the search under User Search Base. If you want to search for a matching user in the User Search Base and all subtrees under the User Search Base, make sure the **Search Subtree** checkbox is selected. If you want to restrict the search for a matching user to only the User Search Base, excluding any subtrees, unselect the **Search Subtree** checkbox.

Customization

Concepts

Portal customization allows you to customize an organization's portal.

Tasks

To customize an organization's portal, provide or update the following **KeyPair Values** in the **Customization** screen. You can also configure the dashboard widgets.

Custom portal properties, including custom widgets, can be added and configured by clicking the blue **Add KeyPair** button at the bottom of the Customization screen.

In order for the Marketplace Portal to recognize a custom widget, the widget itself must start with the prefix `'widget:'`. For example: widget:PropelLink. After creating a custom widget, log out, then log back in. You should see a new widget tile on your Dashboard.

Customize the Portal

1. Access each property by clicking on the **Edit** icon on the right side of the field.

2. Make your changes to each **KeyPair Value** in the **Value** field.

3. When you finish, click **Save**.

Application Labeling

KeyPair Value	Description
portalTitle	Type a name that displays on the login screen and header of your organization's portal.
portalWelcomeMsg	Type a welcome message that displays below the Application Name when a user logs into your organization's portal.
portalFooterMsg	Type a footer message that displays below the login screen and header of your organization's portal.
portalLegalNoticeUrl	Type the link to your organization's legal or copyright statement that displays on the login page below the Log In button of your organization's portal.

External Organization Links

KeyPair Value	Description
portalTermsOfUseUrl	Type the link to your organization's terms and conditions statement that appears when a subscriber is ordering a service.
portalShowTermsOfUse	Check the box to display the terms and conditions link when a subscriber is ordering a service.

Application Enhancements

KeyPair Value	Description
portalFeaturedCategory	Type a featured category to use when displaying service offerings.

KeyPair Value	Description
portalEndDatePeriod (12 months)	Check the **portalEnforceEndDate** box to prevent recurring subscriptions and to require all subscriptions to be term subscriptions. Select the number of months, after which, subscriptions will end. This is the maximum length of a subscription, in months, if a requested end date is specified. When a subscriber selects a requested start date and requests an end date, the length of the subscription cannot be longer than the value of this property. The maximum allowed value is 12 months. For example, if the subscriber selects a requested start date of June 15, 2014, based on the default value of this property, the requested end date cannot be later than June 14, 2015. If no end date is selected, this value is ignored.
portalShowConfirmDialog	Type a portal confirmation message for the consumer in this field.

Themes

KeyPair Value	Description
themeName	Select a theme or type the name of a customized theme for your organization's portal. Themes define colors, fonts and the general look-and-feel. The following themes are shipped out-of-the-box: • HP Simplified • HP Enterprise • HP Playful • Custom - Select **Custom**, and type a custom theme name in the text box. See the "Custom Themes" section in the *Customizing the Marketplace Portal* guide for specific information about configuring a custom theme.

Security Settings

KeyPair Value	Description
securityLevel	Select from the following security banner options: • **No Banner** - no banner displays in the portal. • **Unclassified** - The banner is light green and contains no content. • **Unclassified FOUO** - For official use only. The banner is light green and displays the text "FOUO." • **Unclassified NOFORN** - Not releasable to foreign nationals. The banner is light green and displays the text "NOFORN." • **Confidential** - The banner is light blue and displays the text "CONFIDENTIAL." • **Confidential FOUO** - The banner is light blue and displays the text "CONFIDENTIAL-FOUO." • **Confidential NOFORN** - The banner is light blue and displays the text "CONFIDENTIAL-NOFORN." • **Secret** - The banner is red and displays the text "SECRET. • **Top Secret** - The banner is orange and displays the text "TOP SECRET."
disclaimerText	Type text for the disclaimer for your organization's portal. The disclaimer appears on the login page.

See the section "Themes and Security Classifications" for more information on customizing themes and security classifications for Organizations.

Best Practices

Localizing Content

The following organization attributes can accept localized content:

- portalTitle

- portalWelcomeMsg

- portalFooterMsg

- disclaimerText

Make sure your browser has the desired language activated in settings. Follow the process for customizing the portal for the attribute you want localized. You will see localized content for these fields the next time you log into the MarketplacePortal.

Groups

Concepts

You can add groups to an organization to help differentiate users and assign active roles to users. Once you define the groups within your organization, you can assign roles within the groups to users.

Tasks

These are the actions you can perform in the **Groups** view: add Groups, associate business roles, edit Group Settings, delete associated roles, and remove groups.

The first time you add a group and associate roles within the group, it is an integrated process. You will first input information into the Groups view, then access the Business Roles view and associate your roles with a group, then you will go back to Groups and validate your work to complete the role-group association process.

Add Groups and Associate Business Roles

Here is the process you need to follow to add a group:

1. In the **Create and Manage Your Organizations** view, click on the **Groups** link below **Customization** to open the **Groups** view.

2. Click the **Add Group** button.

3. To add a new group for the organization, provide a **Group Name** and **Distinguished Name** (DN). Both fields are required to create a group.

4. Click **Create**.

The next step in the process is to associate roles with the group. Click on the newly created group name link, which will bring you to the page view for the group.

At this point, no roles have been associated yet with the group. You will need to associate business roles with this group in order to grant role privileges to the organization's users.

1. Click the **Group List** back button on the upper left to return to the **General Information** view.

2. Click the **Business Roles** link below **Groups** to open the Business Roles view.

3. There are currently two roles available: **Consumer Organization Administrator** and **Service Consumer**.
   a. The **Consumer Organization Administrator** role can be thought of as a group administrator or manager. This role can perform functions on behalf of other users that belong to the Service Consumer role.

   b. The **Service Consumer** role has basic level access privileges within organizations.

4. To associate a group with a role, click **Add Group** below the desired role.

5. Select a the group to be associated with the chosen role from the drop-down list.

6. Click **Save** to make the association.

Finally, validate that your group has a newly associated role.

1. Click on the group link for the group you want to view.

2. In the **Groups** view, you should see the new role association for your group listed in the **Associated Roles** section.

You can repeat this process to associate additional groups and roles in your organization.

Edit Groups

You can edit the group name and distinguished name of a group in the **Groups** view. Click on the group name link, make your name changes in the **Group Name** and **Distinguished Name** fields, then click the **Save** button.

Delete Associated Roles

There are two ways to delete an role association from a group:

1. In the **Groups** view, click on the link for the group. Under **Associated Roles**, click the '**X**' to the right of the role to delete this association, or;

2. In the **Business Roles** view, click the '**X**' to the right of the role to delete this association.

3. You will then see the message **No roles associated with this group**.

Remove Groups

There are two ways to remove groups.

1. Click on the **Groups** link to bring up the **Groups** view, click on the trashcan icon to the right of the **Group** name, or;

2. Click on the **Business Roles** link to bring up the **Business roles** view. Click on the group name link, then click the **Delete** button to the right of your screen.

3. You will see a warning window allowing you to either **Remove Group** or **Cancel** the deletion.

4. Click **Remove Group**.

Best Practices

The **Filter Groups** search window in the **Groups** view allows you to type a search string and look for groups by name.

For more information on Business Roles, see the Business Roles section.

Business Roles

Concepts

Business Roles currently available in Organizations are out-of-the-box in Propel. They are as follows:

The **Consumer Organization Administrator** role can be thought of as a group administrator or manager. This role performs functions on behalf of other users that belong to the Service Consumer role, such as ordering a laptop for a new employee or approving a services order. A typical job role might be that of a Manager or Administrative Assistant, someone who is approving requests or processing orders within the MarketPlace Portal as part of their daily tasks.

The **Service Consumer** role has basic level access privileges within organizations. This role can be thought of as a typical end user with full membership within the organization and full access to the MarketPlace Portal.

Tasks

On the Business Roles view, you can associate a group with a Business Role. The association is one to one, a group associates with a role. In this view you can associate a group with a business role or delete an association from a group.

For more information on managing roles and groups, see the Add Groups and Associate Business Roles section.

For more information on deleting an association from a group, see the Delete Associated Roles section.

Best Practices

Make sure to make the proper association of a group with a role. For example, you might want your manager and administration staff have a role association with the Consumer Organization Administrator role, and your internal staff to have a role association with the Service Consumer role.

Themes and Security Classifications

You can also customize the look and feel of the Organization with the Portal themes. Security Classifications are also included and useful for government entities that require various security levels inside their applications. Customization options enable you to change header, title, welcome page, and many other aspects of your Organization.

These are the Themes and Security Classifications that are available:

Portal Themes:

- HP Simplified

- HP Enterprise

- HP Playful

Security Classifications

- Unclassified

- Unclassified FOUO

- Unclassified NOFORN

- Confidential FOUO

- Confidential NOFORN

- Secret

- Top Secret

For more information on customizing themes and security classifications, see **Customization**.

Best Practices

Themes can help you differentiate organizations, so it is useful to become familiar with all available themes. You can experiment with using any theme and change it later or return to the default theme.

Dashboard Widgets

HP Propel provides a set of out-of-the-box dashboard widgets that you can add to your Organization dashboard. These dashboard widgets include:

- Link

- Recent Subscriptions

- Clock

For more information on customizing dashboard widgets, see **Customize Dashboard Widgets**.

Customize Dashboard Widgets

Out-of-the-box Dashboard widgets can be configured for an Organization's dashboard. Custom Widgets are created by changing the KeyPair values, and allow you to add functionality that appears as a tile on the Organization's dashboard.

KeyPair Value	Description
widget:PropelLink	This widget connects your Organization online to the main HP Propel site.
widget:RecentSubscriptions	This widget tracks and displays the most recent subscriptions that are available for the Organization's users.

KeyPair Value	Description
widget:Clock	This widget shows Date information on the dashboard, including Month, Day, and Year.
Custom Widgets	Custom Widgets can be configured by clicking the blue Add KeyPair button at the bottom of the Customization screen. Provide an easily readable display name for the KeyPair, and input the properties for the widget in the Value box. Note that only 10,000 characters are allowed in the KeyPair Value box. For the MarketplacePortal portal to recognize a custom widget it must be named with the prefix **widget:**. See the format of default widgets for an example of this convention.

Best Practices

If you want to delete a widget, click on the trashcan icon to the right of the widget in the Customization screen. Please note that this operation is **permanent** and cannot be undone.