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Enterprise**

HP Propel

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Identity Managment Help

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The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
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Contents

Identity Management

Concepts

An organization determines a member's entry point into HP Propel 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.

Consumer Organization - At installation, a single consumer organization is set up. The HP Propel administrator can use the **Identity** application to modify this default consumer organization, as needed. Members of the consumer organization subscribe to, or consume, the resources and services provided by the provider organization. There may be multiple consumer organizations configured by the provider organization. However, each consumer or subscriber sees only the information of the consumer organization of which he is a member (membership to a consumer organization is determined by the LDAP configuration of the consumer organization).

Tasks

You can perform the following tasks in the **Identity** application:

- "Creating a New Organization" on page 8 – Create a new organization in HP Propel.
- "General Information" on the next page – View and manage an organization's properties, such as the display name and the description.
- "Authentication" on page 9 – 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.
- "Customization" on page 12 – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.
- "Groups" on page 15 – Add groups to manage what roles are assigned to its users.
- "Business Roles" on page 17 – Associate a group with a business role.
- "Themes and Security Classifications" – Customize the look and feel of the organization.
- "Widgets" – Customize and add widgets to an organization's Launchpad.
- "HP Propel Automation License" on page 21 – Manage HP Propel licensing.

Tip: Click here for the latest English version of the HP Propel Identity Management Help, and enter your HP Passport credentials (user ID and password). Alternatively, go to the HP Software Support site at https://softwaresupport.hp.com/group/softwaresupport. Enter your HP Passport credentials and then click **Sign In**. Enter **Propel Identity Help** in the search text box. In the results section, select the help PDF you are interested in that

has the most recent date.

General Information

Concepts

The HP Propel administrator can use this area to provide profile information about the organization so that it is easily recognizable to you and your team.

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 Display Name	A unique name that identifies the organization.
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 Description	A description of the organization.
Organization Picture URL	The URL for a picture that represents the organization.

Tasks

The HP Propel administrator can perform the following tasks in the **General Information** view:

- "View General Information" below
- "Edit General Information" on the next page
- "Delete an Organization" on the next page

View General Information

To view the properties of an organization:

1. Click the **Identity** application in the HP Propel Launchpad. The **Create and Manage Your Organizations** view appears and the current HP Propel organizations are displayed.

2. Click the organization tile that you want to view.

The organization's properties are displayed in the **General Information** view.

Edit General Information

This task presumes you are in the **General Information** view for a specific organization. (See "View General Information" on the previous page for instructions.)

To edit an organization's properties:

1. In the **General Information** view, make changes to the appropriate fields.
2. Click **Save** to finish and save your changes.

The revised properties for the organization are displayed in the **General Information** view.

Delete an Organization

This task presumes you are in the **General Information** view for a specific organization. (See "View General Information" on the previous page for instructions.)

To delete an organization:

1. In the **General Information** view, click **Delete Organization**. A confirmation dialog appears.
2. Confirm deleting the organization by clicking **Delete Organization**.

The former organization is deleted from HP Propel.

Best Practices

The Propel Administrator can edit **Organization Display Name**, **Organization Description**, and **Organization Picture URL** fields after 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.

Related Tasks

- "Authentication" on page 9 – 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.

- "Customization" on page 12 – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.

- "Groups" on page 15 – Add groups to manage what roles are assigned to its users.

- "Business Roles" on page 17 – Associate a group with a business role.

- "Themes and Security Classifications" – Customize the look and feel of the organization.

- "Widgets" – Customize and add widgets to an organization's Launchpad.

- "HP Propel Automation License" – Manage HP Propel licensing.

Creating a New Organization

Concepts

HP Propel administrators can create new organizations that contain groups of users with specific business roles. The look and feel of organizations can be customized using themes.

> **Note**: The URL for the organization is automatically assigned and generated using server location information and the organization name. Once generated, it is not editable.

Tasks

To create a new organization:

1. Click the **Identity** application in the HP Propel Launchpad. The **Create and Manage Your Organizations** view appears and the current organizations in the system are displayed.

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

3. In the **Create Organization** dialog, type in your new **Organization Name**. A unique **Organization ID**, based on your **Organization Name**, is created as a unique identifier in Propel.

4. Click **Create** to create the organization. The new organization appears in the **General Information** view.

5. In the **General Information** view, type an **Organization Description** and provide an **Organization Picture URL**. 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. Click **Save** to save your changes.

After you have created an organization and specified its basic properties, you can perform the following tasks to configure the new organization:

- "Authentication" on the next page – 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.

- "Customization" on page 12 – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.

- "Groups" on page 15 – Add groups to manage what roles are assigned to its users.

- "Business Roles" on page 17 – Associate a group with a business role.

Related Tasks

- "Themes and Security Classifications" – Customize the look and feel of the organization.

- "Widgets" – Customize and add widgets to an organization's Launchpad.

- "HP Propel Automation License" – Manage HP Propel licensing.

Authentication

Concepts

The HP Propel administrator can configure and manage multiple LDAP identity servers for your organization. The administrator 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:

1. Click the **Identity** application in the HP Propel Launchpad. The **Create and Manage Your Organizations** view appears and the current HP Propel organizations are displayed.
2. Click the organization tile that you want to configure LDAP. The **General Information** view is displayed.
3. Click **Authentication**.
4. In the **Authentication** view, click **Add Configuration**.
5. In the **LDAP Server Settings** view, specify the LDAP authentication. See "LDAP Server Settings" below for details of the authentication fields.
6. Click **Save** to complete the authentication configuration.

LDAP Server Settings

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.
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
Full Name	The name of the LDAP attribute used to store the full name of the user. Often, this is `cn` or **Display Name**, but different LDAP directories may use different attributes. Contact your LDAP administrator to determine the proper **Full Name**. Default: `cn`
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

Item	Description
	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 is displayed for the logged-in user. If no avatar is specified, a default avatar image is 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 Searchbase**. If you want to search for a matching user in the **User Searchbase** and all subtrees

Item	Description
	under the **User Searchbase**, make sure the **Search Subtree** checkbox is selected.
	If you want to restrict the search for a matching user to only the **User Searchbase**, excluding any subtrees, unselect the **Search Subtree** checkbox.

Related Tasks

- "General Information" on page 6 – View and manage an organization's properties, such as the display name and the description.
- "Customization" below – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.
- "Groups" on page 15 – Add groups to manage what roles are assigned to its users.
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Customization

Concepts

The HP Propel administer can 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.

For the HP Propel 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 Launchpad.

Customize the Portal

1. Click the **Identity** application in the HP Propel Launchpad. The **Create and Manage Your Organizations** view appears and the current HP Propel organizations are displayed.

2. Click the organization tile that you want to customize. The **General Information** view is displayed.

3. Click **Customization**.

4. In the **Customization** view, edit properties by clicking on the edit icon ⚙ on the right side of the field. Make your changes to each **KeyPair Value** in the **Value** field. See "Customization Fields" below for details.

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

Customization Fields

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
featuredCategory	Type a featured category to use when displaying service offerings.
languages	Type additional localized languages to be used when displaying catalog items.
portalEndDatePeriod (12	Not applicable.

KeyPair Value	Description
months)	
portalEnforceEndDate	Not applicable.
portalShowConfirmDialog	Not applicable.
portalShowLegalNotice	Enables and disables showing a legal notice (**portalLegalNoticeUrl**) in the footer of the **Identity** application. Set to "true" to enable (default) or "false" to disable the feature.
requestOnBehalf	Enables and disables request-on-behalf feature. Set to "true" to enable (default) or "false" to disable the feature.

Themes

KeyPair Value	Description
themeName	Not applicable.

Security Settings

KeyPair Value	Description
securityLevel	Not applicable.
disclaimerText	Not applicable.

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

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 HP Propel Portal.

Related Tasks

- "General Information" on page 6 – View and manage an organization's properties, such as the display name and the description.
- "Authentication" on page 9 – 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.
- "Groups" below – Add groups to manage what roles are assigned to its users.
- "Business Roles" on page 17 – Associate a group with a business role.
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Groups

Concepts

The HP Propel administrator 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

To add a group:

1. Click the **Identity** application in the HP Propel Launchpad. The **Create and Manage Your Organizations** view appears and the current HP Propel organizations are displayed.
2. Click the organization tile that you want to add a group. The **General Information** view is displayed.
3. Click **Groups**. The **Groups** view is displayed and the available groups are listed.
4. In the **Groups** view, click **Add Group**.

5. In the **Add Group** dialog, provide the following required information:
   - **Group Name**
   - **Distinguished Name** (DN)
   - **Authentication** - the LDAP configuration

6. Click **Create**.

The newly created group is listed in the **Available Groups**.

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: **Organization Administrator** and **Consumer**.
   a. The **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 **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 group properties, 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.

Related Tasks

- "General Information" on page 6 – View and manage an organization's properties, such as the display name and the description.

- "Authentication" on page 9 – 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.

- "Customization" on page 12 – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.

- "Business Roles" below – Associate a group with a business role.

- "Themes and Security Classifications" – Customize the look and feel of the organization.

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- "HP Propel Automation License" – Manage HP Propel licensing.

Business Roles

Concepts

Business Roles currently available in Propel 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 HP Propel 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 HP Propel 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.

Related Tasks

- "General Information" on page 6 – View and manage an organization's properties, such as the display name and the description.

- "Authentication" on page 9 – 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.

- "Customization" on page 12 – Customize various aspects of the organization, such as the HP Propel Portal title and welcome message.

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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.

Widgets

HP Propel provides a set of out-of-the-box widgets that you can add to your organization's Launchpad. These widgets include:

- Link
- Clock

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

Customize Widgets

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

KeyPair Value	Description
widget:PropelLink	This widget connects your organization online to the main HP Propel site.
widget:Clock	This widget shows Date information on the Launchpad, 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 HP Propel 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.

HP Propel Automation License

Concepts

The HP Propel administer can view and manage HP Propel software licenses. (Other users can only view licensing information.)

HP Propel uses these license types:

- Instant-on licensing – implemented when installing HP Propel and limited to 60 days.
- Permanent – either unlimited or limited duration.

When users log into HP Propel, a licensing status banner will appear in the following situations:

- The license is due to expire.
- The license has expired.

The banner information is updated when you refresh your view, log into HP Propel, or navigate to a new section of the HP Propel Portal by clicking an application in the Launchpad.

> **Important**: You must be logged in as `admin` to access the software licensing area and manage licensing.

Tasks

To perform the following tasks, go to the Launchpad in HP Propel, click the (`admin`) avatar, and select **License**.

- **View the following information about your software license**:
  - The name of the product.

  - The version of the product.

  - The type of license.

  - The expiration date of the license.

  - The reason the license was issued.

- **Download a license**:
  - For an evaluation license:
    Propel Center

- **Update a license**:
  a. In the **License Management** view, click **Upload License**.

  b. In the **File Upload** dialog, select the HP Propel license that was previously downloaded, and then click **Open**.

The HP Propel license is applied and details are displayed in the **License Management** view.

Note: The most recently applied license is displayed in the **License Management** view.

Send Documentation Feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on Identity Management Help (Propel 2.10)

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