



HelloID Training

Service Automation

Agenda

- Introduction
- Day 1
 - Setup HelloID portal + agent
 - Self Service products
 - Dynamic Forms
 - Data sources basics
 - Delegated Forms basics
- Day 2
 - Delegated Forms advanced
 - Data Sources advanced
 - Powershell tasks
 - HelloID API's

Introduction

Tools4ever

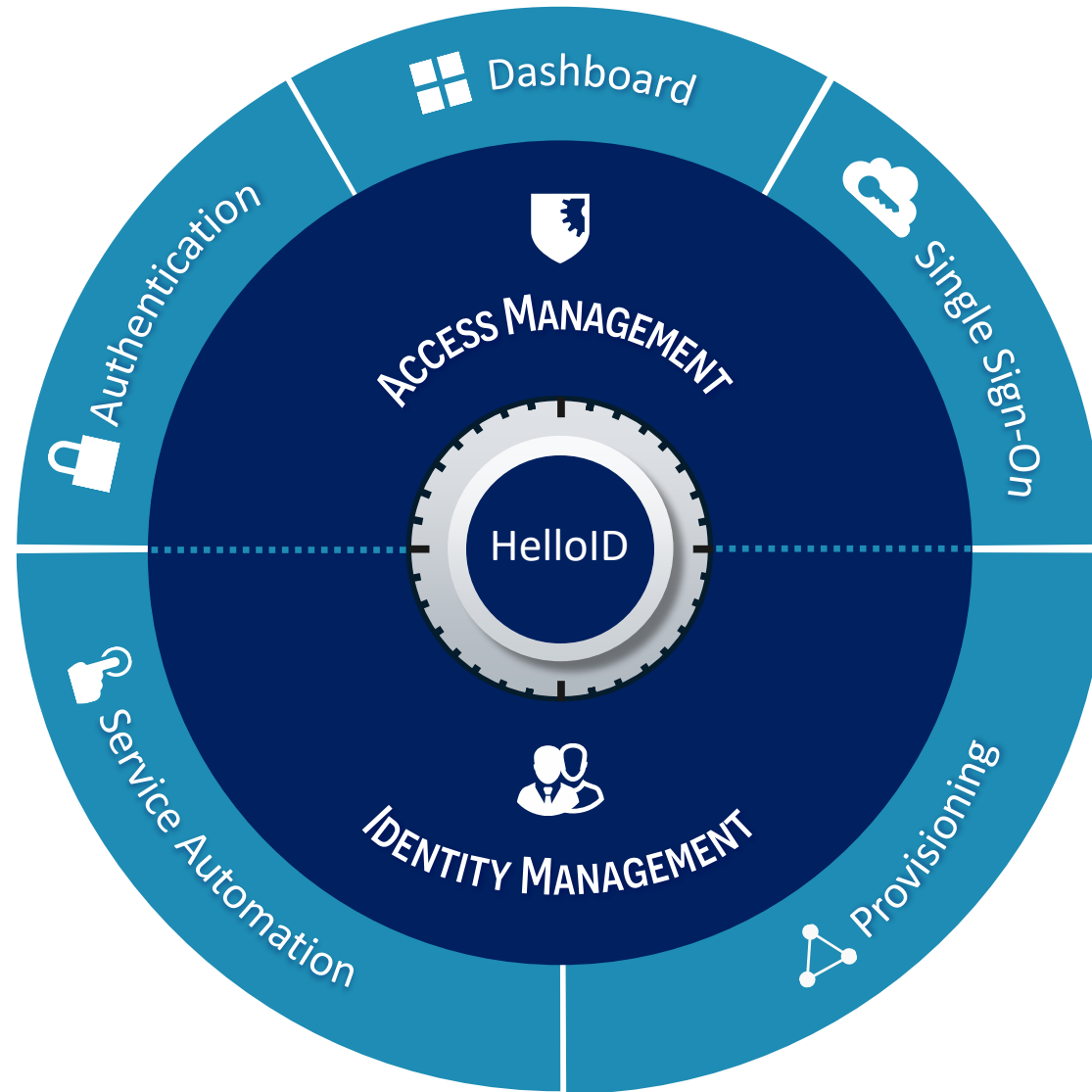
- Dutch origin
- Identity Management
- 7 sites worldwide
- 600 customers in NL
- 5000 customers worldwide
- 140 employees

HelloID Trainers

- Michiel van der Veecken

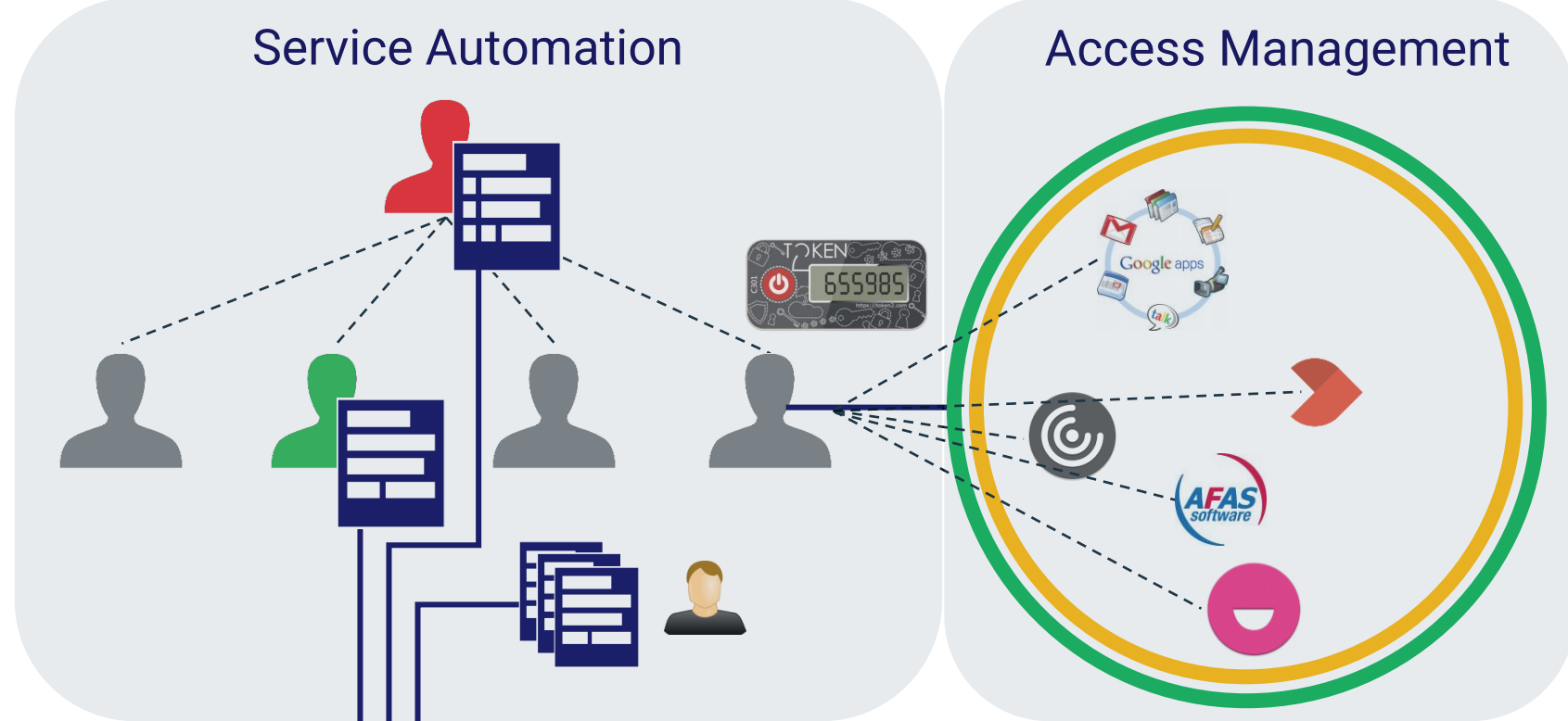
Audience

- Tools4ever partners
- Tools4ever customers

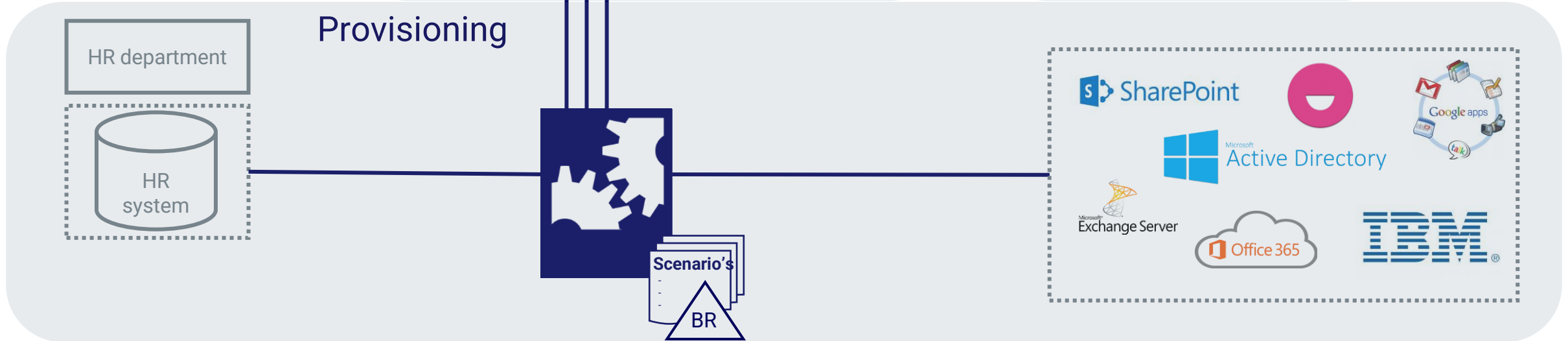


Service Automation

Access Management

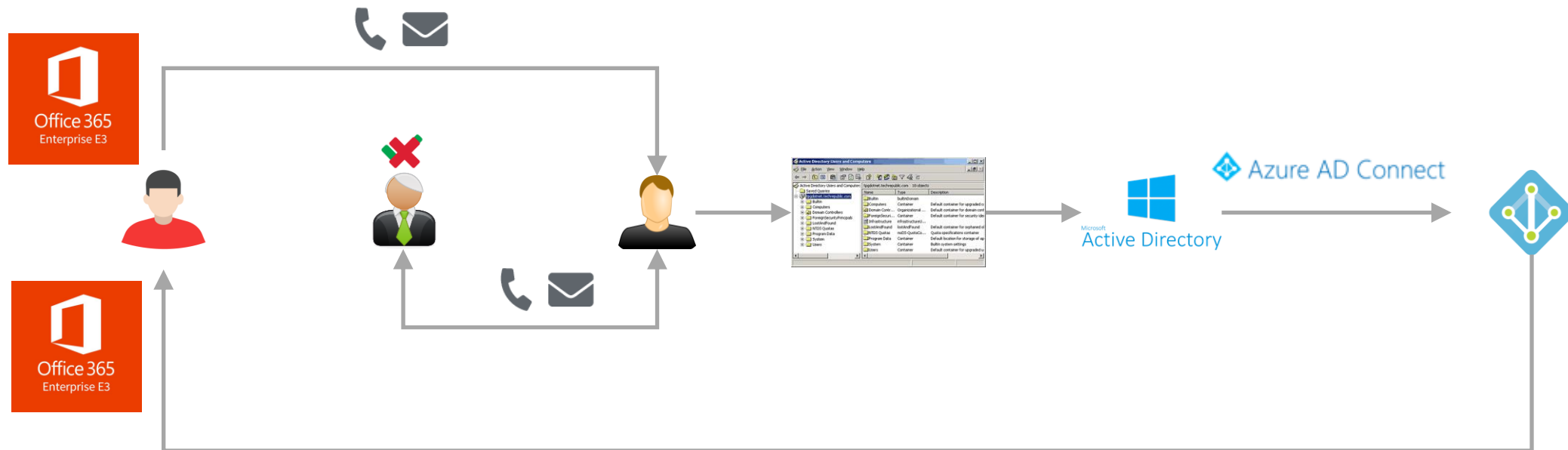


Provisioning



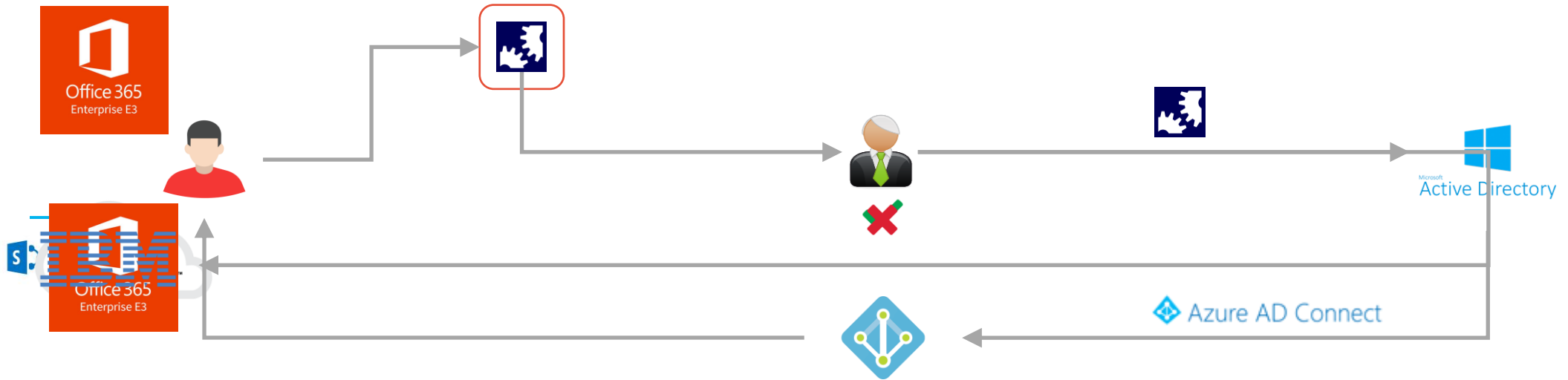
Service Automation

Without Service Automation





With Service Automation



Service Automation “modules”

- Self Service requests
- Helpdesk delegation
- Scheduled automation tasks
- (Scheduled) Reports

Service Automation

Training day 1

Training content day 1

- Setup HelloID portal + agent
- Self Service products
- Dynamic Forms
- Data sources
- Delegated Forms basics

How to setup HelloID

- HelloID Portal
- HelloID Agent
 - Agent Pool
 - Directory Configuration
- HelloID Roles
 - Employee
 - Manager
 - Servicedesk
 - Administrator
 - Consultant

HelloID Agent

HelloID Agent

- Directory Agent
- Provisioning Agent (on-prem and cloud)
- Service Automation agent (on-prem and cloud)

Directory Agent

- On-premise software
- Used for
 - AD authentication
 - AD user and group synchronization including mapping
 - Task execution (Scheduled and Products)
- Polling mechanism for task execution

Service Automation Agent

- On-premise software
- Used for
 - PowerShell data sources
 - Delegated Form task
- Websockets

Lab 1

Installing and configuring the HelloID Agent

Before we start... make sure your Active Directory contains the following (or use the provided PowerShell script)

OU structure

- HelloID Training
 - Users
 - Disabled users
 - Groups

AD user accounts

- 4 employee accounts
 - Configure department and title attributes
- 2 managers accounts
 - Configure department and title attributes
 - Configure manager attribute for user

AD Groups

- 4 AD groups for demo purpose
- Add groups to AD users (random)

Lab 1

30 minutes

Installing and configuring the HelloID Agent

Installing and configuring Active Directory Agent including sync of users and groups.

- Install the Active Directory Agent
- Create Active Directory configuration
 - Synchronize all user accounts from the OU “HelloID Training”
 - Synchronize all groups (because of group nesting)
 - Activate Authentication

Lab 2

Configure HelloID roles

Lab 2

Configure HelloID roles

15 minutes

Description

- Assign default Self Service role to all employees group
- Assign default Manager role to managers group
- Create “Servicedesk” role
 - Enable “Servicedesk → overview” right
 - Assign role to Servicedesk group
- Create “Super Admin” role
 - Enable all available rights
 - Assign role to administrator user

Testing

- Log in as employee and confirm
 - Applications
 - Service Automation → Self Service Products
 - Servicedesk?
- Log in as manager and confirm
 - Applications
 - Service Automation → Self Service Products
 - Management → Managed users
 - Management → Managed products
 - Servicedesk?

Self Service products

Requestable "items" of any kind

End-user perspective

- Employee
 - Request / return product
 - View product request history
- Manager
 - Request / return product for managed employees
 - Inbox for approval actions
 - Approval actions are delegable
- Product owner
 - Request / return products owned by yourself
 - Inbox for approval actions
 - Approval actions are delegable

Admin perspective

HelloID admin portal

- Setup and configure HelloID
- Setup and configure Products, Workflows, Forms, Tasks, Scripts, etc...
- Request history
- Request Administration
- Override approval

How to setup a self service product

- Categories
- Approval Workflow
- Product scoping
- Product actions
- Dynamic Form (optional)

Lab 3

Creating an “instant approved” self service product

Lab 3

20 minutes

Creating an “instant approved” self service product

Description

- Create a new instant approved workflow
- Create a new category
- Create a new product and configure
 - Instant approved workflow
 - Icon
 - Access group for scoping
 - Allow multiple requests

Testing

- Log in as employee and request the product
 - Check your “My products” page
- Log in as manager and request the product for a the same user
 - Try again for a different user
- Log in as administrator and check
 - Self service administration
 - Request history

- No need to add actions / taks to the product
- No need to add a Dynamic form to the product

Lab 4

Creating a “multi-step approval” self service product

Lab 4a

20 minutes

Creating a “multi-step approval” self service product

Description

- Create a new multi-step approval workflow with the following approvers sequence
 - Requester’s manager
 - Resource owner
- Create a new product and configure
 - Multi-step approval workflow
 - Resource owner group
 - Icon
 - Access group for scoping
 - Allow multiple requests

Testing

- Log in as employee and request the product
 - Log in as manager and approve request
 - Log in as one of the resource owners and approve the request
- Log in as administrator and check
 - Self service administration
 - Request history

- No need to add actions / taks to the product
- No need to add a Dynamic form to the product

Lab 4b

15 minutes

Approval by email

Description

- Add your personal email address to an existing AD user account
- Run Active Directory synchronization
- Enable email notifications for your workflow

Testing

- Make a product request
- Approve or deny the request directly by email





- No need to add actions / tasks to the product
- No need to add a Dynamic form to the product

Dynamic Forms

Dynamic Forms basics

- Flexible form structure
- Single or multi page setup
- More than 18 form elements
- Row element (side by side)
- Data sources for enriched data
- Dynamic summary page

MEMBERSHIPS

Available	Member of
<input type="text" value="filter"/>  	<input type="text" value="filter"/>  
helloID	GG_HelloID_Servicedesk
helloid_1	GG_Test
helloid_2	helloid_3
helloid_4	
jajajajajaj	
Janjansen	
Nogeenmooie.ADgrosSD	
proj_HelloID_SA	
test_dl	
test_dl_1	

Navigation arrows: →, →, ←, ←

Step 1: Details

ACCOUNT TYPE *

GIVENNAME *

John

MIDDLE NAME

van der

LAST NAME *

Poel

JOB TITLE

Application owner


DEPARTMENT

ICT

ACCOUNT EXPIRES

YES

PASSWORD *



Next →

Lab 5

Create a new dynamic form "Create AD user"

Lab 5

30 minutes

Create a new Dynamic Form “Create AD user”

Description

Create a new Dynamic form containing

- Text input for
 - Displayname, givenname and lastname
 - Username
 - Department and jobtitle
- Selection for AD OU location
 - Use static values within this form element, no data source (“live data”)
- Expire date configuration
 - Switch/toggle to enable expire date configuration
 - Date input connected to switch for conditional visibility
- Password field

- Graphical interface only
- No data source, actions or tasks required... yet

Lab 5

Example

DISPLAYNAME

USERNAME

DEPARTMENT

JOBTITLE

AD LOCATION *

EXPIREDATE?

CHECKBOX LABEL

EXIPREDATE

Data Sources

Data Sources

- Enriched data for Dynamic Forms
- Three types
 - Static data source
 - Task data source (old infrastructure)
 - PowerShell data source
- Input variables (task- and PowerShell data source)
- Model definition

Lab 6

Create a static data source

Lab 6a

15 minutes

Create a static data source

Description

- Open your Dynamic Form and edit the “AD OU location selector” Form element
- Alter the configuration and add a static data source
 - Containing attributes “path” and “name”
 - Path = distinguished name of AD OU
 - Name = friendly name to display in form
- Update static data source with data for “Enabled Users” and “Disabled User” information from your Active Directory

Testing

- Open (editor modus) the Dynamic Form and check the updated form element contains the static data source data

Lab 6a

Example

VALUE DEFINITION	MODEL DEFINITION			
<pre>1 [2 { 3 "path": "OU=Enabled users,OU=HelloID,DC=enyoi-media,DC=local", 4 "name": "Enabled" 5 }, 6 { 7 "path": "OU=Disabled users,OU=HelloID,DC=enyoi-media,DC=local", 8 "name": "Disabled" 9 } 10]</pre>	<table border="1"><tr><td>path</td></tr><tr><td>name</td></tr><tr><td>Add Field</td></tr></table>	path	name	Add Field
path				
name				
Add Field				

Lab 6b

15 minutes

Use data source default selection

Description

- Add a new column to the existing data source named “selected”
- Enter the numeric value 0 or 1 in your static data source value definition
 - Use value 1 for the default selected row
 - All other rows have value 0
 - **No quotes** around the 1 or 0
- Configure default selection in corresponding Form element

Testing

- Open (editor modus) the Dynamic Form and check the connected form element and it's default value

Delegated Forms

Delegated Forms

- Helpdesk delegation
- Categories
- No approval workflows
- Enriched data via dynamic forms
- Stateless “fire and forget”

Comparison

Self Service product

- Self Service request
 - employee, manager, owner(s)
- Approval workflow
 - single- or multistep
- Additional request data
 - dynamic form
- Product status and actions
 - Approved, returned, etc

Delegated Form

- Helpdesk delegation
 - helpdesk or servicedesk
- Instant actions
 - no approval
- Enriched data
 - dynamic form
- “fire and forget”
 - only task history

Lab 7

Create a Delegated Form “Create AD User”

Lab 7

15 minutes

Create a Delegated Form “Create AD User”

Description

Create a new Delegated Form “Create AD User”

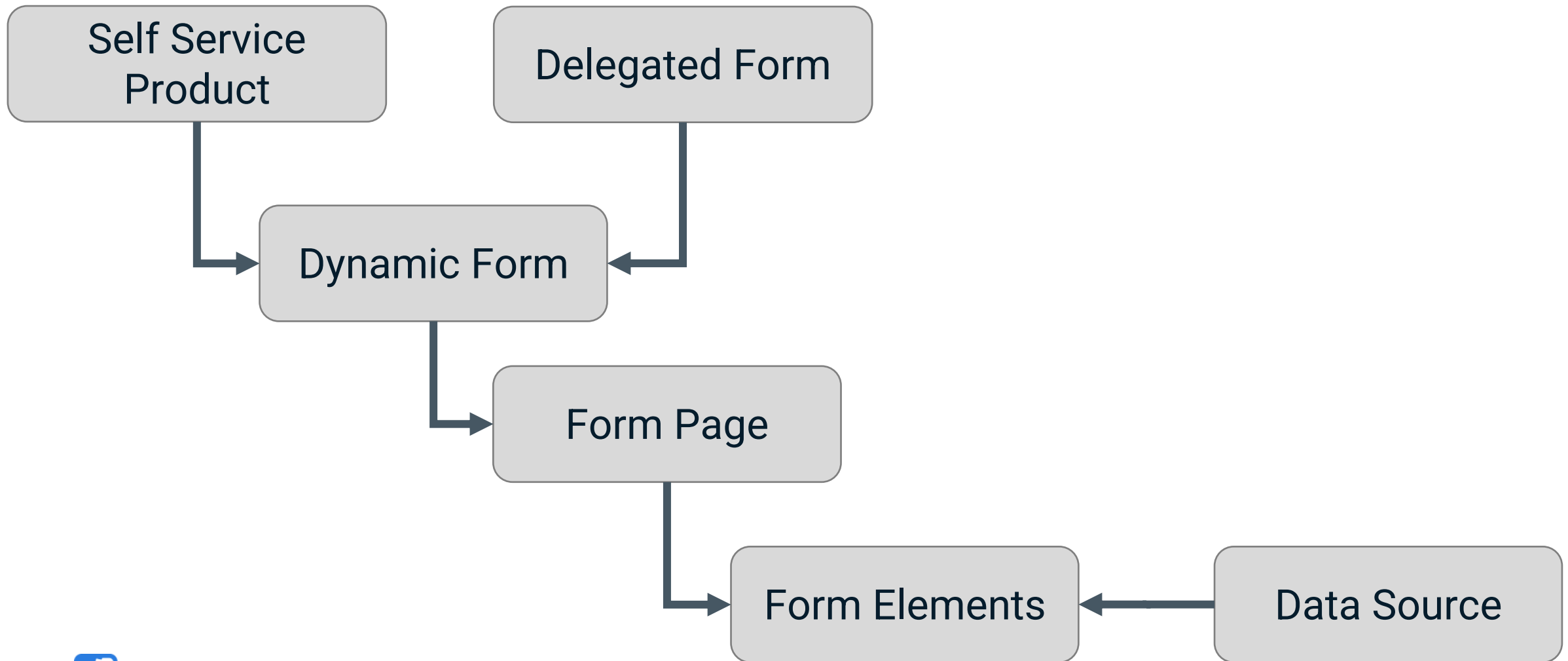
- Use existing Dynamic Form “Create AD User”
- Update the icon
- Configure Access Group

Testing

- Log in as Servicedesk employee, open the Delegated Form and test the Form UI

- No actions or tasks required

HelloID Service Automation Topology



HelloID Tasks / actions basics

HelloID Tasks / actions basics

- HelloID Task catalog
 - Including PowerShell (mostly used)
- Self service product state actions
 - Multiple actions per state (no sequence or data share between actions)
 - Requested, approved, returned, ...
- Delegated Form action
 - Single action

HelloID Tasks / actions trouble shooting

- Request history
- Task history (products and scheduled tasks)
 - Process log
 - Summary log
 - Input variables overview
- Delegated Form (using new SA Agent infrastructure)
 - Activity details
 - Process logging
 - Audit logging
 - Form submission details
- Local PowerShell tooling

Custom Powershell best practices

- Fit for purpose
- Don't create "generic scripts"
 - Copy paste and adjust
- Basic error handling
 - Try { } Catch { }
- Execute PS script on local server to confirm output

Lab 8

Customer case

Lab 8

Customer case

10 minutes

Exam
topic

Customer:

Our servicedesk is getting a lot of authorization requests from employees and managers. Mainly for project folders access and password reset. Since we are using HelloID Service Automation, I would like to make use of this features.

Take some time to make a functional design

How to implement Service Automation

- Client needs?
 - Self Service
 - Delegated Forms
- Target systems
- Responsibilities
- Setup Identity Provider for HelloID

Unique selling points

- Self service **automation**
- Part of rich IDM HelloID platform
- Managed users and products insights
- Extensive workflow options
- API usage

Quick reference guide

- <https://docs.helloid.com/>
 - Manuals
 - Changelog
 - API docs
- <https://feedback.helloid.com/>
 - Feature request
- <https://forum.helloid.com/>
 - Technical Q&A Forum
- <https://roadmap.helloid.com/>
 - Roadmap overview
- <https://github.com/Tools4everBV>
 - Connector / Forms repositories
- <https://helloid.statuspage.io/>
- <https://docs.helloid.com/hc/en-us/categories/360002805319-Training>
 - HelloID training materials