CTX-Vista-User-Management User Guide

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Versions

Document Revisions

The following revisions have been made to this document

Date	Revision	Notes
05/12/2018	1.0	First Release

Module Versions

The following revisions have been made to this document

Date	Revision	Notes
05/12/2018	1.0	Creation of: • VUM-Create-LivePortal-User • VUM-Create LivePortal-User-UI • VUM-Change-Password-UI • VUM-Create-User • VUM-Delete User • VUM-Change-Password • VUM-Assign-ACEs-and-ACLs • VUM-Assign-Group-and-Client • VUM-Retrieve-Vista-User-Properties • VUM-Validate-Vista-User-Credentials

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Preface

About this Manual

This document is a user guide for the CTX-Vista-User-Management module.

Audience

The audience for this document is those wanting to understand how to use CTX-Vista-User-Management module.

Related Material

Document
CTX-Vista-User-Management – Deployment Plan
CTX-Vista-User-Management.studiopkg
CTX-Vista-User-Management – Deployment Plan

Abbreviations used in this Document

OCI Orchestration Communication Interface

SQL Structured Query Language

VUM Vista User Management

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Requirements

The CTX-Vista-User-Management module requires the following:

- Cortex Database OCI
- Cortex PowerShell OCI
- SMTP Server

Instructions for how to install these are included in the deployment plan.

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Integration

Integration with Third-Party Systems

SMTP Server

Integration with Existing Infrastructure

Zebedee Database

For the CTX-Vista-User-Management module to work, the user running the Cortex Database Service need to be given rights to read and execute stored procedures within the Zebedee database. Instructions how to set this up are provided in the 'CTX-Vista-User-Management – Deployment Plan'.

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1 Vista User Management Overview

LivePortal can either be installed in Windows mode, allowing users to login with their domain credentials; or Forms mode, which requires users to be created and assigned roles in Cortex Vista.

The Vista User Management module allows the user to create Cortex Vista users and assign the minimum ACLs, ACEs, Groups and Clients to the user for them to access LivePortal. This is both simpler than creating users in the Cortex Vista application and can allow users to be created systematically from an external system.

1.1 Using the module

Once the .studiopkg file has been imported, navigate to the 'VUM-Change-Password-UI' and set the global variable 'G_SQL_Server' to an appropriate value. This is the SQL Server containing the Zebedee Database.

All functionality is handled using the Cortex Database Interface service user. This user must have the following permissions to the Zebedee Database:

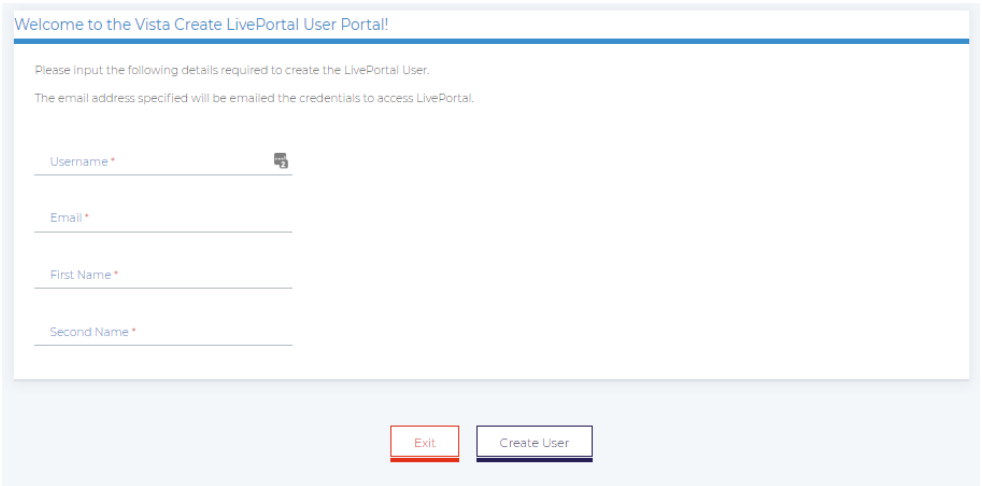
- db_datareader
- db_executor

1.2 User Interface Experience

1.2.1 VUM-Create-LivePortal-User-UI

The 'VUM-Change-Password-UI' is used by the user to create a LivePortal user.

1. The first UI screen, the user will be presented with 2 text boxes, requiring the following information:
    a. Username
    b. Email
    c. First Name
    d. Second Name



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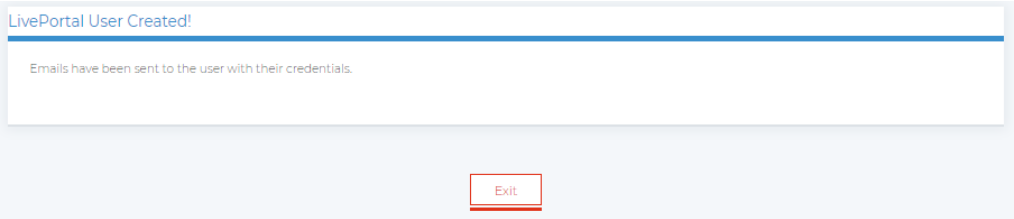
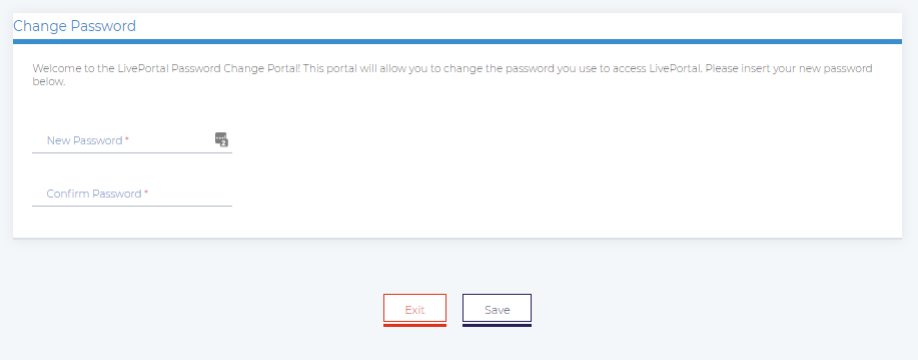
2. When successful, the user will be presented with the following success screen.



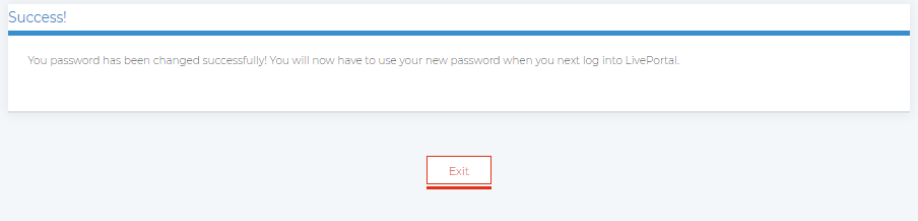
1.2.2 VUM-Change-Password-UI

The 'VUM-Change-Password-UI' is used by the user to update their Cortex Vista password.

1. The first UI screen, the user will be presented two text boxes where they will insert their new password



2. When successful, the user will be presented with the following success screen.



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2 Vista User Management Flows

2.1 VUM-Create-LivePortal-User

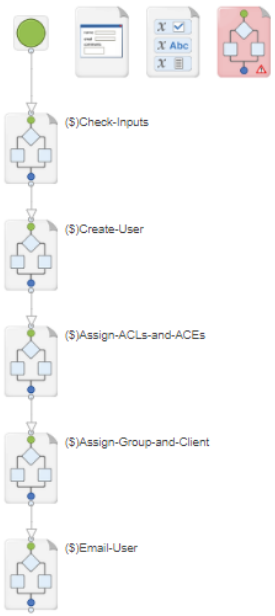
2.1.1 Overview

Creates a user in Cortex Vista security and assigns the minimum required ACEs, ACLs, Groups and Clients for the user to be able to access LivePortal. The user credentials will be emailed to the specified email address.

Exceptions will be raised if:

- Username is not supplied
- First Name is not supplied
- Last Name is not supplied
- Email address is not supplied
- Email address is not in valid format
- LivePortal URL is not supplied
- Username supplied already exists in Vista
- The user running the Cortex Database Service does not have the rights to access the Zebedee database
- SMTP Server is not accessible

2.1.2 States



- Check Inputs

  Validates all required inputs are supplied and the email address supplied is in a valid format. Any required inputs which are missing will be noted in a raised exception. A 12-character password will be randomly generated.

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- Create User

  Calls the 'VUM-Create-User' subtask to create the Vista User. If unsuccessful, an exception will be raised.

- Assign ACLs and ACEs

  Calls the 'VUM-Assign-ACEs-and-ACLs' subtask to assign all required ACEs and ACLs for the Vista User to have access to LivePortal. If unsuccessful, an exception will be raised.

- Assign Group and Client

  Calls the 'VUM-Assign-Group-and-Client' subtask to assign all required Group and Client for the Vista User to have access to LivePortal If unsuccessful, an exception will be raised.

- Email User

  Sends two emails to the email specified: One with the LivePortal URL and the created username, a second with the password for Vista user.

2.1.3 Inputs

Input Variables	Type	Description
i_Username	Text	The user to be created. REQUIRED Example: TestUser
i_Email-Address	Text	The email address for the user to be created. The user will receive the emails containing the credentials to access LivePortal. REQUIRED Example: TestUser@cortex.co.uk
i_First-Name	Text	The first name of the user to be created. Example: Projects
i_Last-Name	Text	The last name of the user to be created. Example: Department
i_LP-URL	Text	The URL the user will use to access LivePortal. REQUIRED. Example: v-ctxappdb.cortex.co.uk/LivePortal
i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255

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2.1.4 Outputs

Output Variables	Type	Description
o_Exception-Message	Text	Details why the user was not created. If successful, this will be blank.

2.2 VUM-Create-LivePortal-User-UI

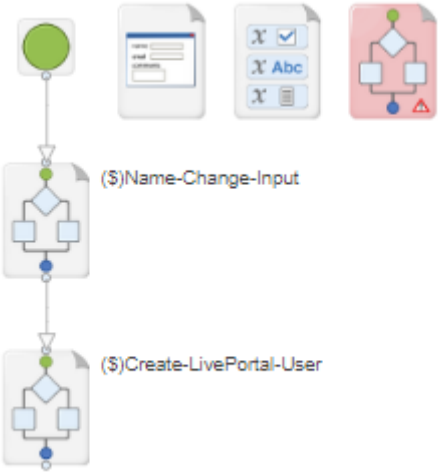
2.2.1 Overview

A UI for the user to input details of a new Vista user to create. Once the user has been created, the user credentials will be emailed to the specified email address.

Exceptions will be raised if:

- Username is not supplied
- First Name is not supplied
- Last Name is not supplied
- Email address is not supplied
- Email address is not in valid format
- LivePortal URL is not supplied
- Username supplied already exists in Vista
- The user running the Cortex Database Service does not have the rights to access the Zebedee database
- SMTP Server is not accessible

2.2.2 States



- Input Screen

  The user inputs the new password to be applied to their user.

- Create LivePortal User

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The 'VUM-Create-LivePortal-User' flow is called to create the user. The user is informed if the creation was successful. If the creation was unsuccessful, the user will be informed why.

2.3 VUM-Change-Password-UI

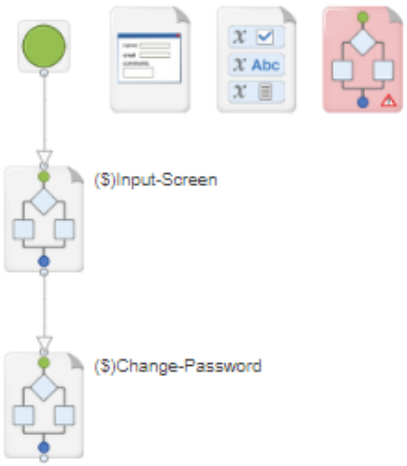
2.3.1 Overview

A UI for the user to input a new password for their user. Once the change has been implemented, the user will be able to log on with the new password when they next access LivePortal.

Exceptions will be raised if

- The password is not between 8 – 32 characters
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

2.3.2 States



- Input Screen

  The user inputs the new password to be applied to their user.

- Change Password

  The 'VUM-Change-Password' subtask is called to change the user's password. The user is informed if the change was successful. If the change was unsuccessful, the user will be informed why.

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3 Vista User Management Subtasks

3.1 VUM-Create-User

3.1.1 Overview

The VUM-Create-User-Session creates a new user in Cortex Vista.

Exceptions will be raised if

- Username not supplied
- First Name not supplied
- Last Name not supplied
- Password not supplied
- Password it between 8-32 characters in length
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.1.2 Inputs

Input Variables	Type	Description
VCU_i_Username	Text	The username for the user to be created. REQUIRED Example: TestUser
VCU_i_User-Password	Text	The password for the user to be created. REQUIRED Example: P4s5W0rD
VCU_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255
VCU_i_User-Domain	Text	The domain where the server will be created. If not supplied, "VISTA" will be used. Example: Vista
VCU_i_User-Authentication	Text	The authentication method of the user to be created. If not supplied, "Pivetal" will be used. Example: Windows Generic
VCU_i_First-Name	Text	The first name of the user to be created. Example: Projects

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VCU_i_Last-Name	Text	The last name of the user to be created. Example: Department
VCU_i_Email-Address	Text	The email address for the user to be created. Example: TestUser@cortex.co.uk

3.1.3 Outputs

Output Variables	Type	Description
VCU_o_Exception-Message	Text	Details why the user was not created. If successful, this will be blank.

3.2 VUM-Delete-User

3.2.1 Overview

The VUM-Delete-User subtasks deletes the specified user from Cortex Vista.

Exceptions will be raised if

- Username not supplied
- Username not valid
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.2.2 Inputs

Input Variables	Type	Description
VDU_i_Username	Text	The username for the user to be deleted. REQUIRED Example: TestUser
VDU_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255
VDU_i_User-Domain	Text	The domain where the server will be created. If not supplied, "VISTA" will be used. Example: Vista

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VDU_i_User-Authentication	Text	The authentication method of the user to be created. If not supplied, “Pivetal” will be used. Example: Windows Generic

3.2.3 Outputs

Output Variables	Type	Description
VDU_o_Exception-Message	Text	Details why the user was not deleted. If successful, this will be blank.

3.3 VUM-Change-Password

3.3.1 Overview

The VUM-Change-Password subtask updates the specified user’s password in Cortex Vista.

Exceptions will be raised if

- Username not supplied
- Username not valid
- Password not supplied
- Password it between 8-32 characters in length
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.3.2 Inputs

Input Variables	Type	Description
VCP_i_Username	Text	The username for the user to be update the password. REQUIRED Example: TestUser
VCP_i_User-Password	Text	The new password for the user. REQUIRED Example: P4s4W0rD
VCP_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, ‘localhost’ will be used. Example: 255.255.255.255
VCP_i_User-Domain	Text	The domain where the server will be created. If not supplied, “VISTA” will be used. Example: Vista

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VCP_i_User-Authentication	Text	The authentication method of the user to be created. If not supplied, “Pivetal” will be used. Example: Windows Generic

3.3.3 Outputs

Output Variables	Type	Description
VCP_o_Exception-Message	Text	Details why the password was not updated. If successful, this will be blank.

3.4 VUM-Assign-ACEs-and-ACLs

3.4.1 Overview

The VUM-Assign-ACEs-and-ACLs assigns an ACE and ACL pair to the user.

Exceptions will be raised if

- Username not supplied
- Username not valid
- ACE not supplied
- ACE not valid
- ACL not supplied
- ACL not valid
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.4.2 Inputs

Input Variables	Type	Description
VAAA_i_Username	Text	The username for the user to assign ACLs and ACEs to. REQUIRED Example: TestUser
VAAA_i_ACL	Text	ACL to assign to the user. REQUIRED Example: CAccessController
VAAA_i_ACE	Text	ACE to assign to the user. REQUIRED Example: ChangePassword

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VAAA_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255
VAAA_i_User-Domain	Text	The domain where the server will be created. If not supplied, "VISTA" will be used. Example: Vista
VAAA_i_User-Authentication	Text	The authentication method of the user to be created. If not supplied, "Pivetal" will be used. Example: Windows Generic
VAAA_i_User-Security	Text	The security mode of the user. If not supplied, "User" will be used. Example: User

3.4.3 Outputs

Output Variables	Type	Description
VAAA_o_Exception-Message	Text	Details why the ACL and ACE were not assigned to the user. If successful, this will be blank.

3.5 VUM-Assign-Group-and-Client

3.5.1 Overview

The VUM-Assign-Group-and-Client assigns a group and the group's client to the user in Cortex Vista.

Exceptions will be raised if

- Username not supplied
- Username not valid
- Group not supplied
- Group not valid
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

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3.5.2 Inputs

Input Variables	Type	Description
VAGC_i_Username	Text	The username for the user to be assigned a group and client. REQUIRED Example: TestUser
VAGC_i_Group-Name	Text	The name of the group to assign to the user. REQUIRED Example: Users
VAGC_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255
VAGC_i_User-Domain	Text	The domain where the user exists. If not supplied, "VISTA" will be used. Example: Vista
VAGC_i_User-Authentication	Text	The authentication method of the user. If not supplied, "Pivetal" will be used. Example: Windows Generic
VAGC_i_User-Security	Text	The security mode of the user. If not supplied, "User" will be used. Example: User
VAGC_i_Group-Domain	Text	The domain where the group exists. If not supplied, "VISTA" will be used. Example: Vista
VAGC_i_Group-Authentication	Text	The authentication method of the group. If not supplied, "Pivetal" will be used. Example: Windows Generic
VAGC_i_Group-Security	Text	The security mode of the user. If not supplied, "Group" will be used. Example: Group

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3.5.3 Outputs

Output Variables	Type	Description
VAGC_o_Exception-Message	Text	Details why the Group and Client were not assigned to the user. If successful, this will be blank.

3.6 VUM-Retrieve-Vista-User-Properties

3.6.1 Overview

The VUM-Retrieve-Vista-User-Properties returns properties and roles assigned to the user in Cortex Vista.

Exceptions will be raised if

- Username not supplied
- Username not valid
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.6.2 Inputs

Input Variables	Type	Description
RVUP_i_Username	Text	The username for the user to retrieve the properties of. REQUIRED Example: TestUser
RVUP_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255

3.6.3 Outputs

Output Variables	Type	Description
RVUP_o_User-Propeties	Structure	Properties assigned to the user. Will contain the following elements: • Name • Mail • Username • Roles

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3.7 VUM-Validate-Vista-User-Credentials

3.7.1 Overview

The VUM-Validate-Vista-User-Properties validates the credentials supplied are that of the user in Cortex Vista.

Exceptions will be raised if

- Username not supplied
- Password not supplied
- Credentials supplied not valid
- The user running the Cortex Database Service does not have the rights to access the Zebedee database

3.7.2 Inputs

Input Variables	Type	Description
VVUP_i_Username	Text	The username for the user to validate. REQUIRED Example: TestUser
VVUP_i_User-Password	Text	The password for the user. REQUIRED Example: P4s4W0rD
VVUP_i_DB-Server	Text	Name or IP of the DB server where the Cortex databases are stored. If not supplied, 'localhost' will be used. Example: 255.255.255.255

3.7.3 Outputs

Output Variables	Type	Description
VVUP_o_User-Propeties	Structure	Properties assigned to the user. Will contain the following elements: • Name • Mail • Username • Roles

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