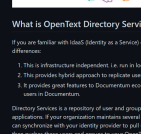
OpenText™ Directory Services (OTDS)



What is OpenText Directory Services?

If you are familiar with Idaas (Identity as a Service) concept, and have used OKTA/Auth0/Azure-AD, this is quite similar, but it has some main differences:

1. This is infrastructure independent. i.e. run in local PC or cloud instances or Kubernetes clusters on any Windows/Unix OS.
2. This provides hybrid approach to replicate users from various sources (AD, LDAP, etc.)
3. It provides great features to Documentum eco-system. E.g., User & Group Consolidation, pluggable push connector to create and maintain users in Documentum.

Directory Services is a repository of user and group identity information and a collection of services to manage this information for OpenText applications. If your organization maintains several Enterprise Server systems, they can all use the same central user directory. Directory Services can synchronize with your identity provider to pull user and group information from your identity provider automatically. Directory Services then pushes these users and groups to your OpenText applications automatically and incrementally. This synchronization of user and group data across OpenText applications allows Directory Services to enable single sign on and secure access to all OpenText applications.

OpenText Directory Services is a security service that acts as an identity broker between corporate user directory services and OpenText products. OTDS enables centralized identity management and Single Sign On (SSO) for OpenText products. This simplifies authentication setup while increasing security and corporate compliance across all OpenText applications. As a single centralized point for identity management of users, groups, and other organizational units, OTDS solves for seamless user authentication and access to Documentum Server and associated components like D2, xCP and Webtop clients.

OTDS also provides added benefits to Documentum customers:

1. Simplified deployment with one shared service for all OpenText product identities
2. Up-to-date integration with Microsoft Active Directory Services and common LDAPv3 systems.
3. Support for common authentication standards (SAMLv2.0, Kerberos, OpenID, oAuth2.0 2-Factor)
4. Support of 3rd-party Web Access Management products such as CA SiteMinder and RSA Access Manager.
5. Deployment support for on-premise, Hybrid, and Cloud environments

Installation Steps (Manual Docker Build)

Although official guides are there to use Helm Charts on Kubernetes Cluster, but I find it easy to start with basic docker containers. This allow me to understand the basic installation procedure and at the same time using containers to re-provision things fast in case things are not going well.

Here are some instructions that could help you provision OTDS for your POC. In my use case I'm using Postgres as Database, Unix as OS and Tomcat 10 with OpenJDK 11.

1. Provision Postgres Docker Container and create `otds` database I have a local docker network (dctm-dev) that I use to connect whole Documentum stack and its sub components like postgres etc. This allow me to use docker hostname as FQDN.

```
docker network create dctm-dev
docker run --network dctm-dev --name postgres --hostname postgres -e POSTGRES_PASSWORD=password -d -p 5432:5432 postgres:11
```

Database script for `otds` database

```
CREATE ROLE otds WITH
LOGIN
NOSUPERUSER
NOCREATEDB
NOCREATEROLE
NOINHERIT
NOREPLICATION
SUPERUSER
CONNECTION LIMIT -1
PASSWORD 'password';

COMMENT ON ROLE otds IS 'User for OTDS database';

CREATE DATABASE otds WITH
OWNER = otds
ENCODING = 'UTF8'
CONNECTION LIMIT = -1;

COMMENT ON DATABASE otds
IS 'OpenText Directory Services';

GRANT ALL ON DATABASE otds TO otds;
```

2. Provision Tomcat Docker Container Create a tomcat 10 docker container with java 11:

```
docker run --network dctm-dev -d --name documentum-otds --hostname documentum-otds -p 9001:8080 tomcat:10
```

3. Install OTDS a. Download Official 'otds-2210-lnx.tar' file from OpenText Download Centre (under 'All Products') b. Extract and fix some shell scripts I assume that the directory where tar file has been placed is `/media/files/OTDS`

```
tar -xf otds-2210-lnx.tar
sed -i 's/bin/sh/bin/bash/g' tools/checkJDKString.sh
```

c. Create a response file This is a silent installer response file which will be used to setup OTDS.

```
cat << EOF > response.properties
[Setup]
InstDir=
Version=22.1.0.2968
Patch=0
BinaryDir=/usr/local/tomcat/temp/
ConfigFile=/usr/local/tomcat/temp/setup.xml
Action=Install
Logs=
Instance=1
Feature=All

[Property]
INST_GROUP=root
INST_USER=root
INSTALL_DIR=/usr/local/OTDS
TOMCAT_DIR=/usr/local/tomcat
PRIMARY_NODE=documentum-otds
ISERVICE_TOMCAT=Y
OTDS_PASS=password
IMPORT_DATA=N
UNZIPTOOL_EXE=
MIGRATION_OPTION=1
MIGRATION_OPTION_PASSWORD=password
JDBC_CONNECTION_STRING=jdbc:postgresql://postgres:5432/otds
JDBC_DB_NAME=otds
JDBC_PASSWORD=password
EOF
```

d. Copy required files for next step

```
docker cp otds-2210-lnx.tar documentum-otds:/usr/local/tomcat/temp/
docker exec documentum-otds sh -c 'cd /usr/local/tomcat/temp/; tar -xf otds-2210-lnx.tar'
docker cp tools/checkJDKString.sh documentum-otds:/usr/local/tomcat/temp/tools/
docker cp response.properties documentum-otds:/usr/local/tomcat/temp/
```

e. Install OTDS

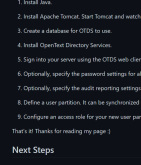
```
docker exec documentum-otds sh -c 'cd /usr/local/tomcat/temp/; ./setup -rf response.properties -ql -I otds-installer.log'
```

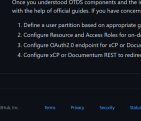
4. Test OTDS Admin Portal Connect to OTDS Admin using the URL and credentials below:

http://[DOCKER-HOST]:9001/otds-admin

User Name : otadmin@otds.admin

Password : password (Same as OTDS_PASS in response file)





5. Follow official guide to Synchronise users from Azure AD (if your users are provisioned here), and enable SAML SSO for OTDS Admin UI. See the screenshots below after implementing SAML SSO for OTDS Admin UI.

6. Follow official user guide to setup OTDS for Documentum. xCP SSO. Next version of this page will be published soon to provide some more details.

Check List

You can use the following checklist to configure a basic installation of Directory Services for demonstration:

1. Install Java.
2. Install Apache Tomcat. Start Tomcat and watch for start-up success in the logs.
3. Create a database for OTDS to use.
4. Install OpenText Directory Services.
5. Sign into your server using the OTDS web client.
6. Optionally, specify the password settings for all users in an OTDS non-synchronized user partition.
7. Optionally, specify the audit reporting settings and notification settings for OTDS.
8. Define a user partition. It can be synchronized or non-synchronized.
9. Configure an access role for your new user partition.

That's it! Thanks for reading my page :)

Next Steps

Once you understood OTDS components and the integration patterns with Identity Providers, it would be nice to attempt below integration with the help of official guides. If you have concerns, please raise issues, and I'll try my level best to address at the earliest.

1. Define a user partition based on appropriate group and user filters. It can be synchronized or non-synchronized.
2. Configure Resource and Access Roles for on-demand (push-connector) user synchronisation in Documentum Repository.
3. Configure OAuth2.0 endpoint for xCP or Documentum REST Client.
4. Configure xCP or Documentum REST to redirect user to get Access Tokens from OTDS