



One Identity Manager 9.2.1

# Software Management Administration Guide

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**Legend**

 **WARNING:** A WARNING icon highlights a potential risk of bodily injury or property damage, for which industry-standard safety precautions are advised. This icon is often associated with electrical hazards related to hardware.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

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For the most recent documents and product information, see [Online product documentation](#).

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## Managing software

One Identity Manager allows you to manage software applications comfortably and to assign them to identities. You can create software application and group them into software packages. The software and software packages are assigned to identities. You can make assignments directly or indirectly by assigning them to hierarchical roles. Software and software packages can be requested through the IT Shop.

**NOTE:** Prerequisite for the use of software management in One Identity Manager is the installation of the software management module. For more information about installing, see the *One Identity Manager Installation Guide*.

One Identity Manager components for managing software are available if the **Software | Application configuration** parameters is set.

- In the Designer, check if the configuration parameter is set. Otherwise, set the configuration parameter and compile the database.

If you disable the configuration parameter at a later date, model components and scripts that are no longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the *One Identity Manager Configuration Guide*.

## One Identity Manager users for managing software

The following users are used for managing software.

**Table 1: User**

Users	Tasks
One Identity Manager administrators	One Identity Manager administrator and administrative system users Administrative system users are not added to application roles.

## Users

## Tasks

One Identity Manager administrators:

- Create customized permissions groups for application roles for role-based login to administration tools in the Designer as required.
- Create system users and permissions groups for non role-based login to administration tools in the Designer as required.
- Enable or disable additional configuration parameters in the Designer as required.
- Create custom processes in the Designer as required.
- Create and configure schedules as required.

Product owner for the IT Shop

Product owners must be assigned to the **Request & Fulfillment | IT Shop | Product owners** application role or a child application role.

Users with this application role:

- Approve through requests.
- Edit service items and service categories under their management.


**NOTE:** This application role is available if the **QER | ITShop** configuration parameter is set.

The **Request & Fulfillment | IT Shop | Product owners | Software** default application role can be used.

# Creating and editing software

You can create and edit individual software applications.

## **To edit a software application**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Edit the software's main data.
4. Save the changes.

## Detailed information about this topic

- [General main data of software](#) on page 6
- [Extended main data of software](#) on page 7
- [Software supervisors](#) on page 8
- [Software inventory data](#) on page 8

# General main data of software

Enter the following general main data.

**Table 2: General main data of a software application**

Property	Description
Software name	Name of the software.
Version	Version of the software.
Language	Language of the software. Languages are supplied by default as base data in One Identity Manager.
IT Shop	Specifies whether the software can be requested through the IT Shop. This software can be requested through the Web Portal and allocated by defined approval processes. The software can still be assigned directly to identities and hierarchical roles.
Only for use in IT Shop	Specifies whether the software can only be requested through the IT Shop. This software can be requested through the Web Portal and allocated by defined approval processes. The software may not be assigned directly to hierarchical roles.
Service item	Service item data for requesting the software through the IT Shop.
Alternative software	Name of alternative software.
Internal product name	Internal name of the product.
Website	Manufacturer's website. Use the <b>Visit vendor website</b> task to open the given website.
Link to documentation	Link to the product documentation. Use the <b>Visit documentation website</b> task to open the given website.
Software	Full name of the software with name, language, and version number.
Description Comment	Text field for additional explanation.

Property	Description
Dongle required	Specifies whether a dongle is required for this software to work.
Only assign to workdesks	Specifies whether the software can only be assigned to workdesks. If this option is not set, the software can be assigned to identities and workdesks and inherited. If the option is set, the software can only be assigned to and inherited by workdesks.
Only assign to identities	Specifies whether the software can only be assigned to identities. If this option is not set, the software can be assigned to identities and workdesks and inherited. If the option is set, the software can only be assigned to and inherited by identities.
Deactivated	Specifies whether the software is still used or not. Only software that is enabled can be assigned in One Identity Manager. If the software is not enabled, it cannot be assigned but existing assignments remain intact.
Spare field no. 01 ... Spare field no. 10	Additional company-specific information. Use the Designer to customize display names, formats, and templates for the input fields.


## Extended main data of software

Enter the data for installing software.

**NOTE:** Permitted values are predefined. Use the Designer to define other permitted values.

**Table 3: Extended main data of a software application**

Property	Description
Installation type	Type of installation. Permitted values are <b>Local installation</b> and <b>Network installation</b> .
Use state	The actual state of usage. Permitted values are <b>Planned</b> , <b>Available</b> , and <b>Not available</b> .
Use state changed on	Date on which the use state was changed.
Access type	How the software is accessed. Permitted values are <b>Limited access</b> and <b>Public access</b> .
Change cycle	Type of change cycle. Permitted values are <b>Yearly</b> , <b>Monthly</b> , <b>Quarterly</b> , and <b>On demand</b> .
Approval process	Approval process for the software. Permitted values are <b>General approval</b> , <b>Approval by item</b> , and <b>Global approval</b> .

Property	Description
Supported operating systems	Provides information about which operating systems are supported. Use the button  to insert new operating systems.
Installation date	Installation date of the software.
Risk index	Value for evaluating the risk of assigning the software to identities. Set a value in the range <b>0</b> to <b>1</b> . This field is only visible if the <b>QER   CalculateRiskIndex</b> configuration parameter is set. For more information, see the <i>One Identity Manager Risk Assessment Administration Guide</i> .

## Software supervisors

Enter identities that are responsible for the software.

**Table 4: Identities responsible for a software application**

Property	Description
Expert and deputy Expert	Expert and deputy for the software. If the software can be requested in the IT Shop, the experts are automatically members in the application role for product owners to which the service item is assigned.
Coordinator	Software coordinator
IT manager and deputy IT manager	IT manager and deputy for the software.

## Software inventory data

Enter the required inventory information on the Inventory tab. This information can be included in the performance calculation if necessary.

**Table 5: Software application inventory data**

Property	Description
Usage [months]	Period of use for the software in months.
Internal transfer price	Information about the price for invoicing the software internally.
Company software	Specifies whether the software is the company's own software.

# Assigning software to workdesks and identities

You can assign software directly or indirectly to identities or workdesks. In the case of indirect assignment, identities (workdesks) and software applications are grouped into hierarchical roles. The number of software applications is calculated from the position in the hierarchy and the direction of inheritance assigned to an identity (or workdesk).

Software can also be assigned to identities through IT Shop requests. Add identities to a shop as customers so that software can be assigned through IT Shop requests. Any software that can be assigned to this shop can be requested by the customers. Requested software is assigned to the identities after approval is granted.

Using system roles, you can group together software and assign it to identities and workdesks as a package. You can create system roles that only contain software. You can also group any number of company resources into a system role.

## Prerequisites for indirect assignment of software to identities

- Assignment of identities and software is permitted for the role class (department, cost centers, location, or business role).

## Prerequisites for indirect assignment of software to workdesks

- Assignment of workdesks and software is permitted for the role class (department, cost center, location or business role).

### ***To configure assignments to roles of a role class***

1. In the Manager, select role classes in the **Organizations > Basic configuration data > Role classes** category.  
- OR -  
In the Manager, select role classes in the **Business roles > Basic configuration data > Role classes** category.
2. Select the **Configure role assignments** task and configure the permitted assignments.
  - To generally allow an assignment, enable the **Assignments allowed** column.
  - To allow direct assignment, enable the **Direct assignments permitted** column.
3. Save the changes.

**NOTE:** There are other configuration settings that play a role when company resources are inherited through departments, cost centers, locations, and business roles. For example, role inheritance might be blocked or inheritance of identities or workdesks not allowed. For more detailed information about the basic principles for assigning company resources, see the *One Identity Manager Identity Management Base Module*

| *Administration Guide.*

For more information see the following guides:

<b>Topic</b>	<b>Guide</b>
Basic principles for assigning and inheriting company resources	<i>One Identity Manager Identity Management Base Module Administration Guide</i> <i>One Identity Manager Business Roles Administration Guide</i>
Assigning company resources through IT Shop requests	<i>One Identity Manager IT Shop Administration Guide</i>
System roles	<i>One Identity Manager System Roles Administration Guide</i>

### Detailed information about this topic

- [Assigning software to departments, cost centers, and locations](#) on page 10
- [Assigning software to business roles](#) on page 11
- [Adding software to the IT Shop](#) on page 12
- [Assigning software directly to identities](#) on page 13
- [Assigning software directly to workdesks](#) on page 13
- [Adding software to system roles](#) on page 14

## Assigning software to departments, cost centers, and locations

You can assign software to departments, cost centers, and locations so that the software is inherited by identities and workdesks through these organizations.

### ***To assign a software application to departments, cost centers, or locations***

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign organizations** task.
4. In the **Add assignments** pane, assign the organizations:
  - On the **Departments** tab, assign departments.
  - On the **Locations** tab, assign locations.
  - On the **Cost centers** tab, assign cost centers.

| **TIP:** In the **Remove assignments** pane, you can remove assigned organizations.

### **To remove an assignment**

- Select the organization and double-click ✓.
5. Save the changes.

### **Related topics**

- [Assigning software to business roles](#) on page 11
- [Adding software to the IT Shop](#) on page 12
- [Assigning software directly to identities](#) on page 13
- [Assigning software directly to workdesks](#) on page 13

## **Assigning software to business roles**

**NOTE:** This function is only available if the Business Roles Module is installed.

You can assign software to business roles so that the software can be assigned to identities and workdesks through these business roles.

### **To assign a software application to business roles**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign business roles** task.
4. In the **Add assignments** pane, select the role class and assign business roles.

**TIP:** In the **Remove assignments** pane, you can remove assigned business roles.

### **To remove an assignment**

- Select the business role and double-click ✓.
5. Save the changes.

### **Related topics**

- [Assigning software to departments, cost centers, and locations](#) on page 10
- [Adding software to the IT Shop](#) on page 12
- [Assigning software directly to identities](#) on page 13
- [Assigning software directly to workdesks](#) on page 13

# Adding software to the IT Shop

Once software is assigned to an IT Shop shelf, it can be ordered by the shop's customers. There are other prerequisites required to make software requestable.

- The software must be labeled with the **IT Shop** option.
- The software must be assigned to a service item.
- If you want the software to be assigned only to identities through the IT Shop, the software must also be marked with the **Only use in IT Shop**. Then, the software may no longer be assigned directly to hierarchical roles.

## **To add a software application to the IT Shop**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select **Add to IT Shop**.
4. In the **Add assignments** pane, assign the software to IT Shop shelves.
5. Save the changes.

## **To remove a software application from individual IT Shop shelves**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Add to IT Shop** task.
4. In the **Remove assignments** pane, remove the software from the IT Shop shelves.
5. Save the changes.

## **To remove a software application all IT Shop shelves**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Remove from all shelves (IT Shop)** task.
4. Confirm the security prompt with **Yes**.
5. Click **OK**.

The software is removed from all shelves by the One Identity Manager Service. All requests and assignment requests that include this software are canceled in the process.

For more information about requesting company resources through the IT Shop, see the *One Identity Manager IT Shop Administration Guide*.

## Related topics

- [General main data of software](#) on page 6
- [Assigning software to departments, cost centers, and locations](#) on page 10
- [Assigning software to business roles](#) on page 11
- [Assigning software directly to identities](#) on page 13
- [Assigning software directly to workdesks](#) on page 13

# Assigning software directly to identities


The default procedure for distributing company resources to identities is to add them to roles and assign company resources to these roles. In order to react quickly to special requests, you can also assign company resources directly to an identity.

### ***To assign a software application directly to identities***

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign to identities** task.
4. In the **Add assignments** pane, add identities.

**TIP:** In the **Remove assignments** pane, you can remove assigned identities.

#### ***To remove an assignment***

- Select the identity and double-click .
5. Save the changes.

## Related topics

- [Assigning software to departments, cost centers, and locations](#) on page 10
- [Assigning software to business roles](#) on page 11
- [Adding software to the IT Shop](#) on page 12

# Assigning software directly to workdesks

Software can be assigned directly or indirectly to a workdesk. Indirect assignment is carried out by assigning workdesks and software to company structures, such as departments, cost centers, locations, or business roles.


To react quickly to special requests, you can assign software applications directly to workdesks.

### **To assign a software application directly to workdesks**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign workdesks** task.
4. In the **Add assignments** pane, assign workdesks.

**TIP:** In the **Remove assignments** pane, you can remove assigned workdesks.

#### **To remove an assignment**

- Select the workdesk and double-click .
5. Save the changes.

### **Related topics**

- [Assigning software to departments, cost centers, and locations](#) on page 10
- [Assigning software to business roles](#) on page 11

## **Adding software to system roles**

**NOTE:** This function is only available if the System Roles Module is installed.

Use this task to individually group software packages for identities, workdesks, and roles. Identities and workdesks can obtain software packages directly or by inheriting them over company structures. It is also possible to request software packages through the IT Shop.


**NOTE:** Software, which has the **Only use in IT Shop** option set, can only be assigned to system roles that also have this option set. For more information, see the *One Identity Manager System Roles Administration Guide*.

### **To assign a software application to system roles**

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign system roles** task.
4. In the **Add assignments** pane, assign system roles.

**TIP:** In the **Remove assignments** pane, you can remove assigned system roles.

#### **To remove an assignment**

- Select the system role and double-click .
5. Save the changes.

When you assign a system role to identities, the software application are inherited by those identities.

# Assigning extended properties to software


Extended properties are meta objects, such as operating codes, cost codes, or cost accounting areas that cannot be mapped directly in One Identity Manager.

## ***To specify extended properties for a software application***

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Select the **Assign extended properties** task.
4. In the **Add assignments** pane, assign extended properties.

**TIP:** In the **Remove assignments** pane, you can remove assigned extended properties.

### ***To remove an assignment***

- Select the extended property and double-click .
5. Save the changes.

For more information about using extended properties, see the *One Identity Manager Identity Management Base Module Administration Guide*.

# Deleting software

You can only delete software when it is no longer assigned to identities, workdesks, or roles. Remove any assignments before you delete the software.

## ***To delete a software application***

1. In the Manager, select the **Software > Software** category.
2. Select the software in the result list.
3. Delete the software.
4. Confirm the security prompt with **Yes**.

## Configuration parameters for managing software

The following configuration parameters are additionally available in One Identity Manager after the module has been installed.

**Table 6: Configuration parameters for managing software applications**

Configuration parameter	Description
Software	Specifies whether software management is supported.
Software   Application	Preprocessor relevant configuration parameter to control the database model components for managing software. If the parameter is set, the components for managing software are available. Changes to this parameter require the database to be recompiled.  <b>NOTE:</b> If you disable the configuration parameter at a later date, model components and scripts that are no longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the <i>One Identity Manager Configuration Guide</i> .

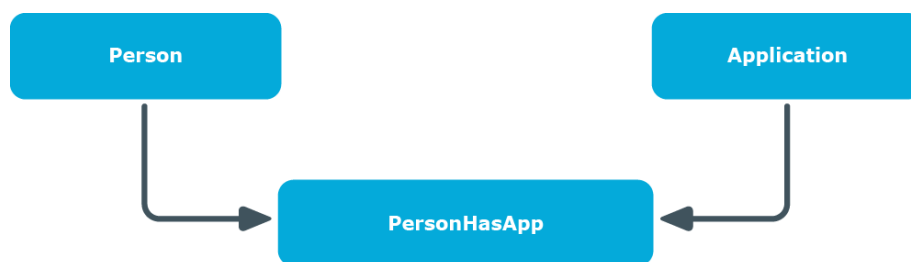
## Technical details of inheriting software

Identities can directly obtain software. Furthermore, identities inherit (and pass on) all software applications from all the roles of which they are members (PersonIn<BaseTree> table) as well as the software of all the roles that are referenced over a foreign key relationship (Person table, UID\_<BaseTree> column). Direct and indirect assignments of software to identities are mapped in the PersonHasApp table.

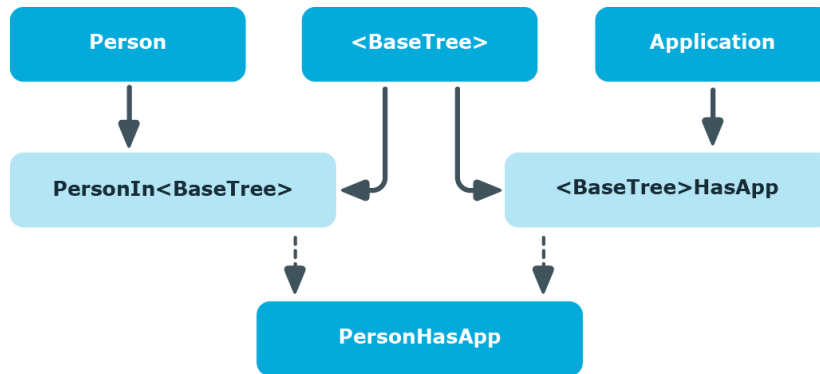
A workdesk can directly obtain software. Furthermore, workdesks inherit (and pass on) all software applications from all the roles of which they are members (PersonIn<BaseTree> table) as well as the software of all the roles that are referenced over a foreign key relationship (Workdesk table, UID\_<BaseTree> column). Direct and indirect assignments of software to workdesks are mapped in the WorkdeskhasApp table.

Assignments of roles to software are stored in the <BaseTree>HasApp table. Software can also be inherited through system roles. For more information, see the *One Identity Manager System Roles Administration Guide*.

**Figure 1: Inheritance with direct assignment of software to identities**



**Figure 2: Inheritance with indirect secondary assignment of software to identities**



**Figure 3: Inheritance with indirect primary assignment of software to identities**



One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

## Contacting us

For sales and other inquiries, such as licensing, support, and renewals, visit <https://www.oneidentity.com/company/contact-us.aspx>.

## Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at <https://support.oneidentity.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to videos at [www.YouTube.com/OneIdentity](http://www.YouTube.com/OneIdentity)
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product