SETUP GUIDE

UIPATH-BEYONDTRUST CREDENTIAL STORE PLUGIN

GENERAL CONCEPTS

The purpose of a UiPath Orchestrator Credential Store is to save Robot/Asset credentials on an external platform, such as the BeyondInsight platform from BeyondTrust.

Inside Beyond Insight, a credential is stored as a Managed Account entity, which sits under a Managed System.
Typically, Managed Systems might host multiple Managed Accounts but a Managed Account will sit under only one Managed System.

A Managed System can uniquely be identified by the System Name.
A Managed Account can uniquely be identified by the Managed System that hosts it and by its Username (for Active Directory accounts, the User Principal Name).

Therefore, to uniquely find a particular account under a BeyondTrust instance, you will a **Managed System Name + Managed Account Username combination**.
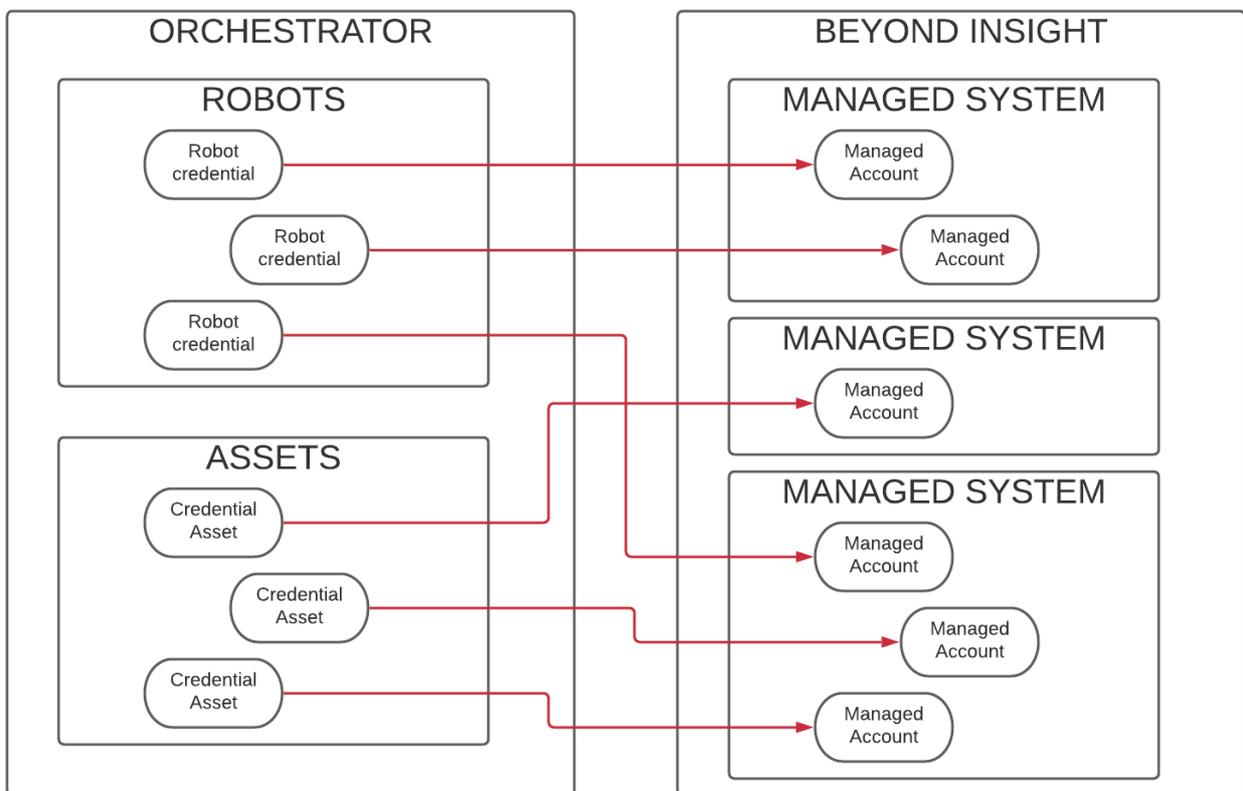
SINGLE SYSTEM VS DYNAMIC SYSTEM

There are 2 ways you can use this integration, depending on your setup.
You can also use both, having multiple Credential Stores set up in the Orchestrator at the same time.

SINGLE SYSTEM

The Single System setup assumes that all the Managed Accounts you are going to use with the Orchestrator, are linked to the same Managed System.

In this scenario, you can specify the Managed System name upon initial setup, in the Credential Store configuration page (screenshots and detailed steps in the following pages).

Then, when setting up Credential Assets / Robot Credentials, under the "External Name" field, you only need to type the Managed Account username, and the plugin will automatically match it using the Managed System name from the initial settings.

DYNAMIC SYSTEM

The Dynamic System setup should be used especially when the Managed Accounts you are going to use with the Orchestrator are linked to different Managed Systems.

In this scenario, you can specify a Delimiter Character (E.g. "/", "|", "$", "#") upon initial setup, in the Credential Store configuration page (screenshots and detailed steps in the following pages). Make sure you pick a character that is not found in the Managed System names or in the Managed Account usernames (E.g. "@" is very likely to be found in Managed Account usernames so it should be avoided).

Then, when setting up Credential Assets / Robot Credentials, under the "External Name" field, you need to type the Managed System name, followed by the Delimiter, followed by the Managed Account username, and the plugin will automatically use both to create the combination and find it in the Beyond Insight system.
E.g. External name: "mySystem/andrei.cristea@uipath.com".

The rule of thumb is, only if you can be sure that the Managed Accounts you are going to link to the Orchestrator, all live under the same Managed System, go for the Single System version. Otherwise, go for Dynamic System.

BEYOND INSIGHT SETUP

1. Create an **API Registration** for UiPath Group of Service Accounts:
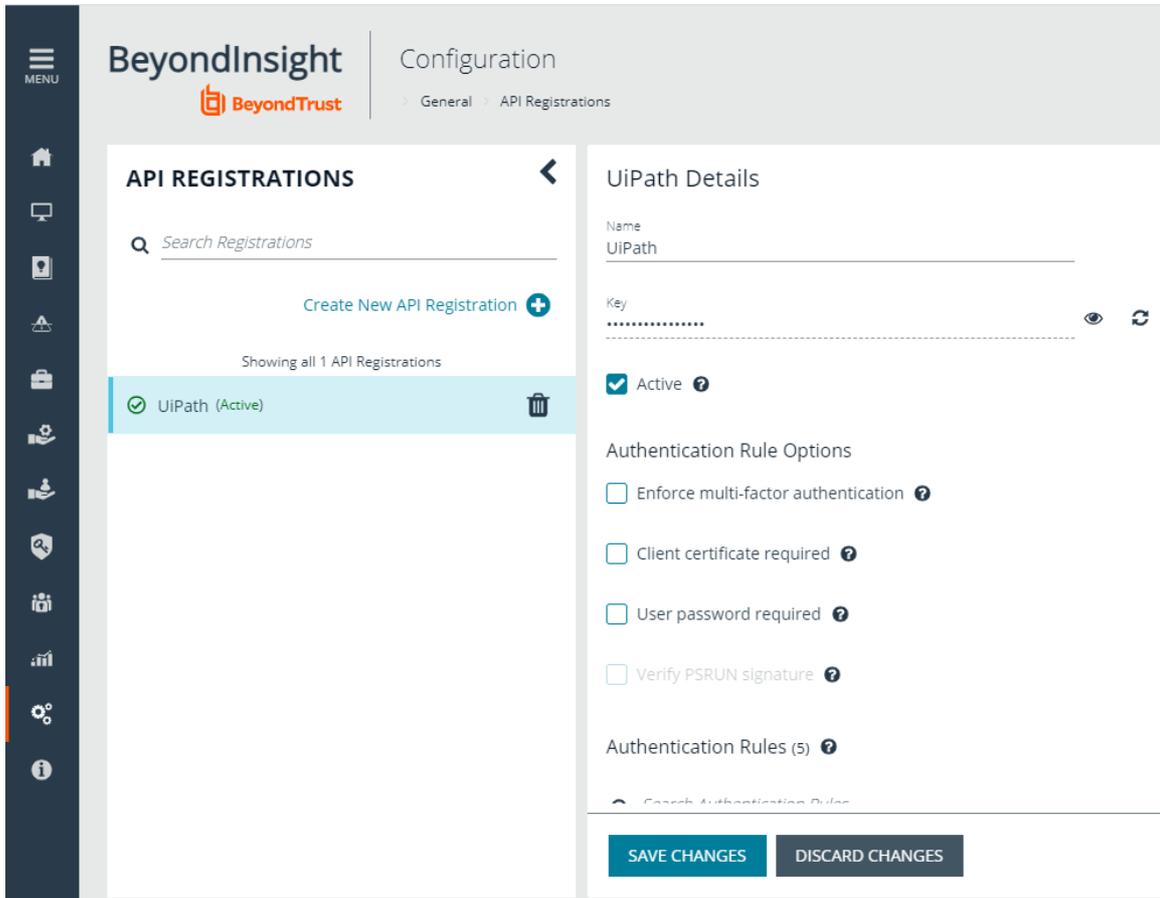
2. Create an Authentication Rule to allow incoming connection to API from UiPath:
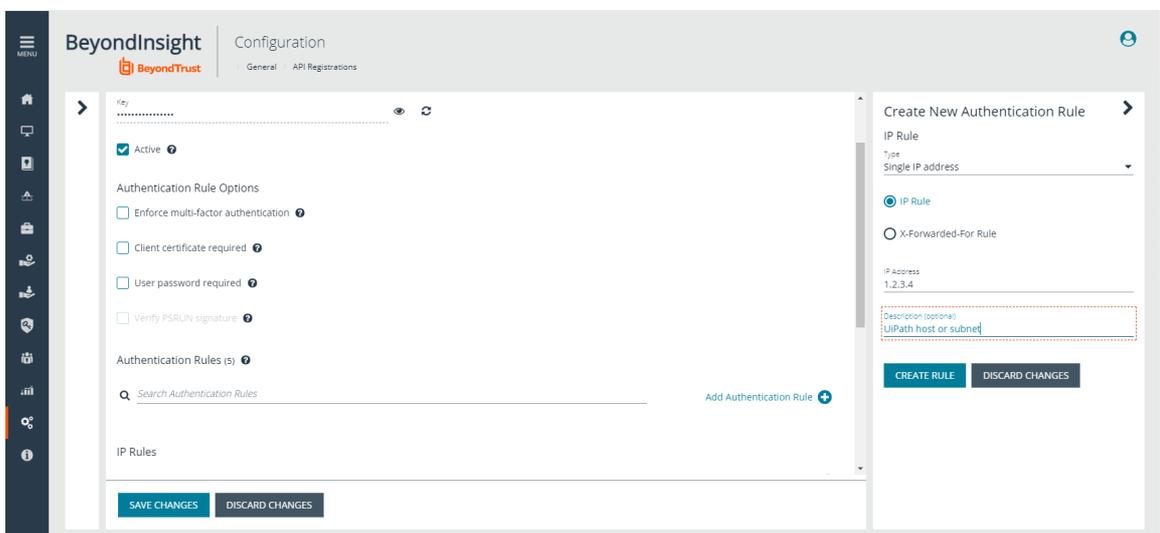
3. Create a new Group for UiPath Service Account(s) and add these Features:
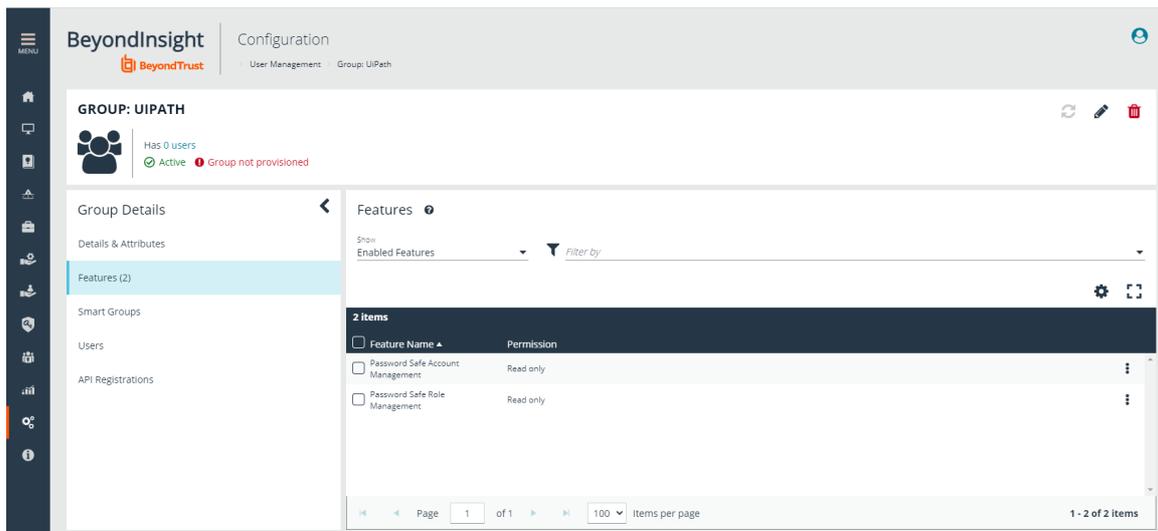
4. You also need to assign Smart Rules. Managed Accounts/Read-Only/Requester will be sufficient for regular User Requests. For ISA access, Assets/ISA role is needed:
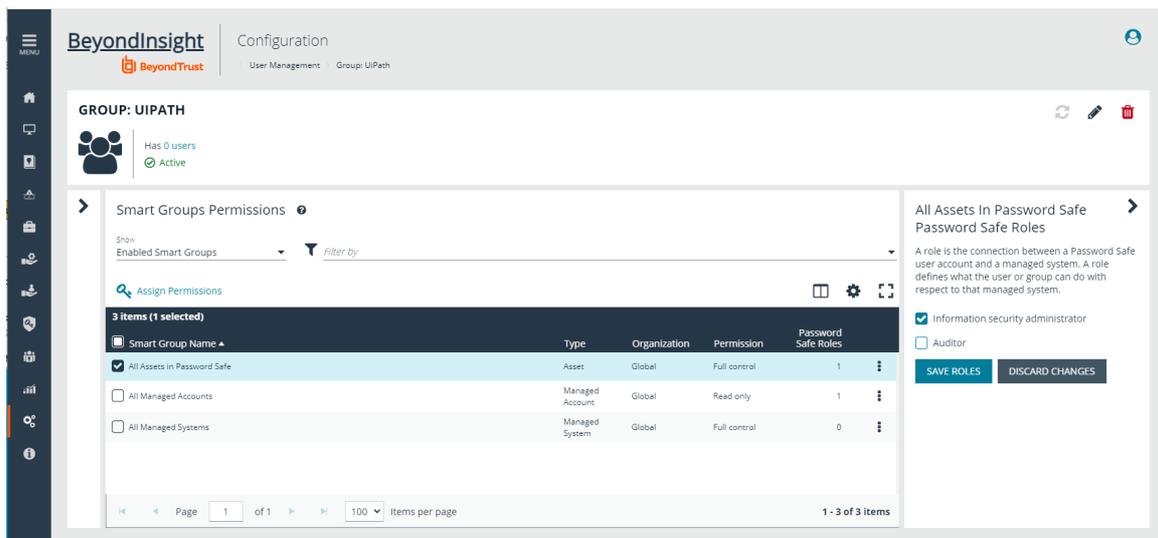
5. Add the API Registration to the Group:
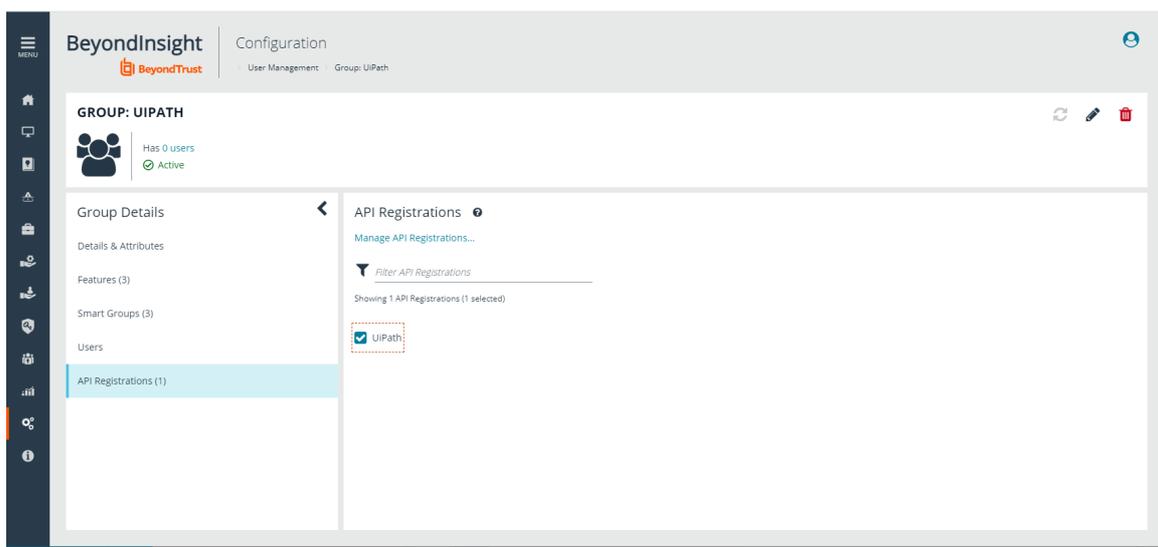
6. Create a new **User** and assign the UiPath Group:
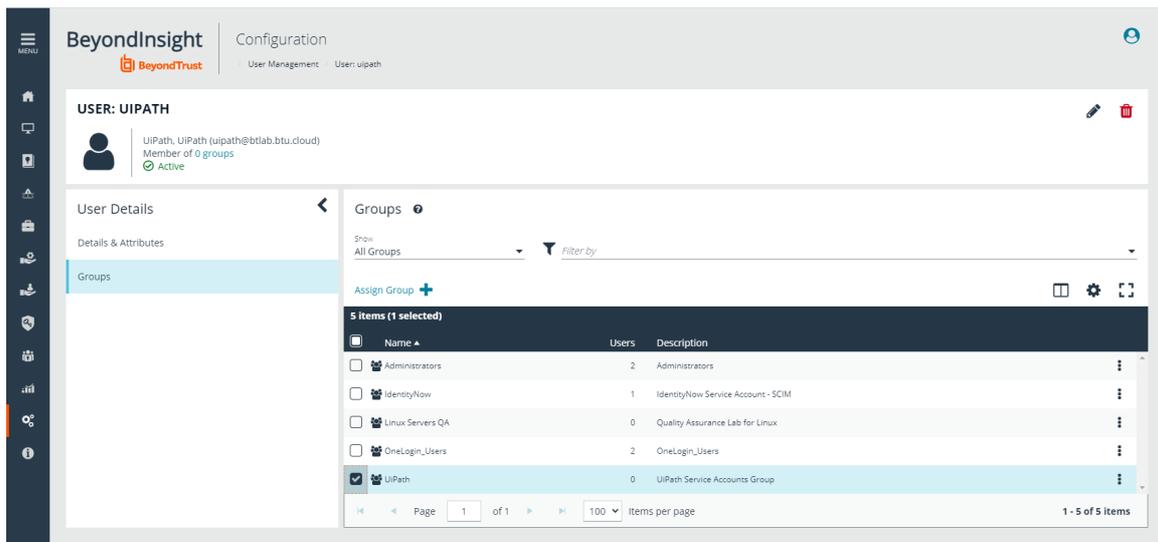
7. The Managed Accounts you are going to use need to sit under **Managed Systems**:
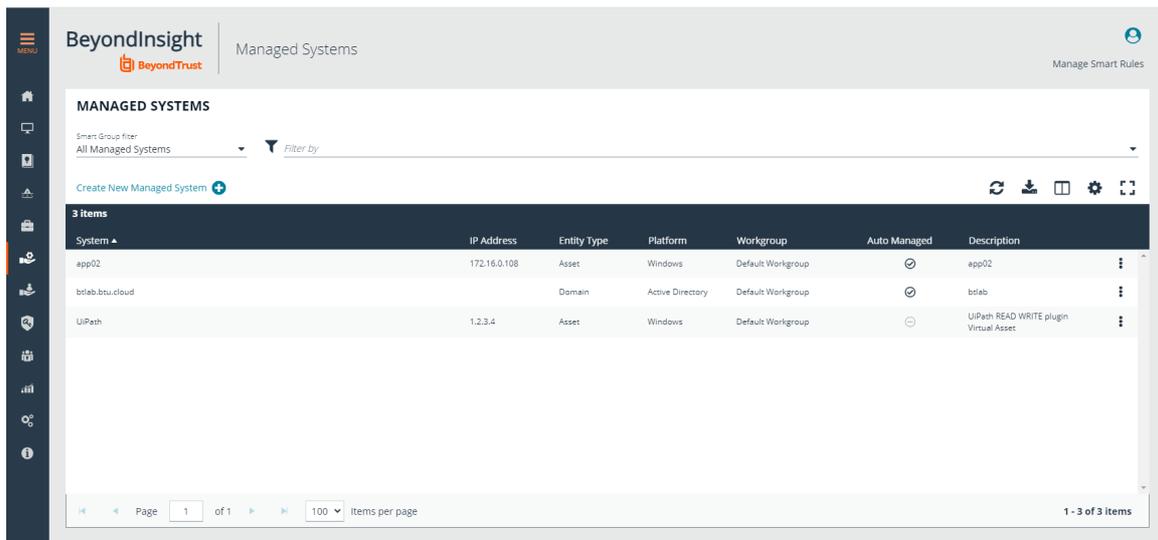
8. The Managed Accounts you are going to use with UiPath need to have **API Enabled**:
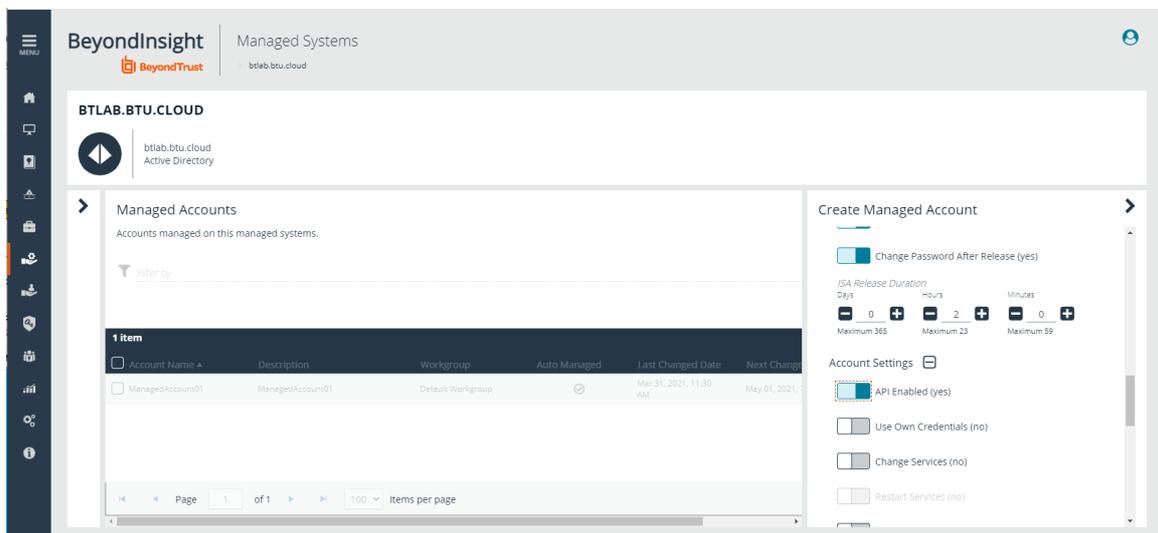
9. You will need to remember the **API key** for the API Registration together with the **Service Account username** (E.g. uipath).
For Single System setup, you will need to remember the **Managed System name,** under which the Managed Systems that you will link to UiPath exist.

ORCHESTRATOR SETUP

1. Log in to Orchestrator using an Admin Account and head to Credential Stores in the menu:
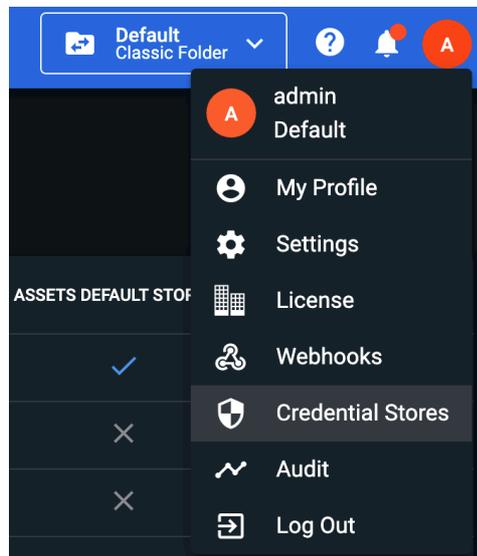
2. Click the + sign to add a new Credential Store, pick Single or Dynamic System and fill in the required fields using the values from the Beyond Insight setup:

3. After clicking Create, a validation will be performed. If no errors are displayed and the Credential Store shows up in the list, the connection was successful:
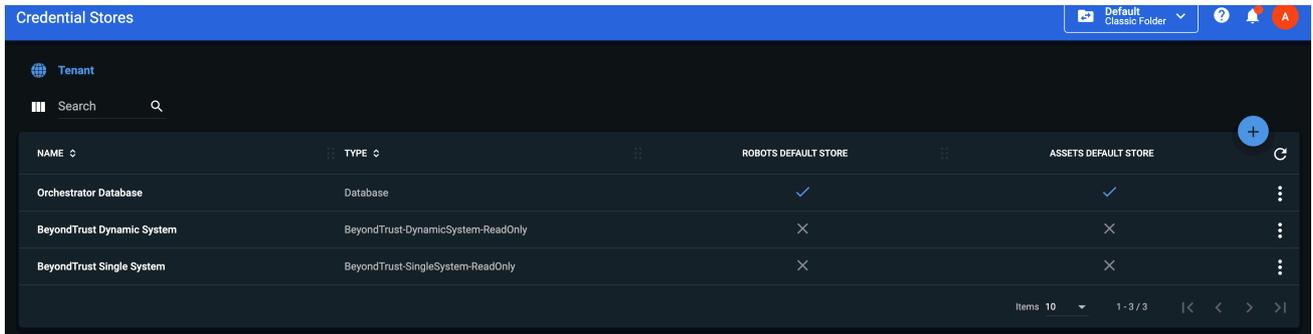
(The example screenshot shows both versions set up, but only need one is needed)

4. You can now head to Assets, create a new Credential Type Asset and select your Credential Store from the "Orchestrator Store" field. Fill in the "External Name" accordingly (see page 3 for Single System vs Dynamic System), for the plugin to retrieve the credential from Beyond Insight (username and password):
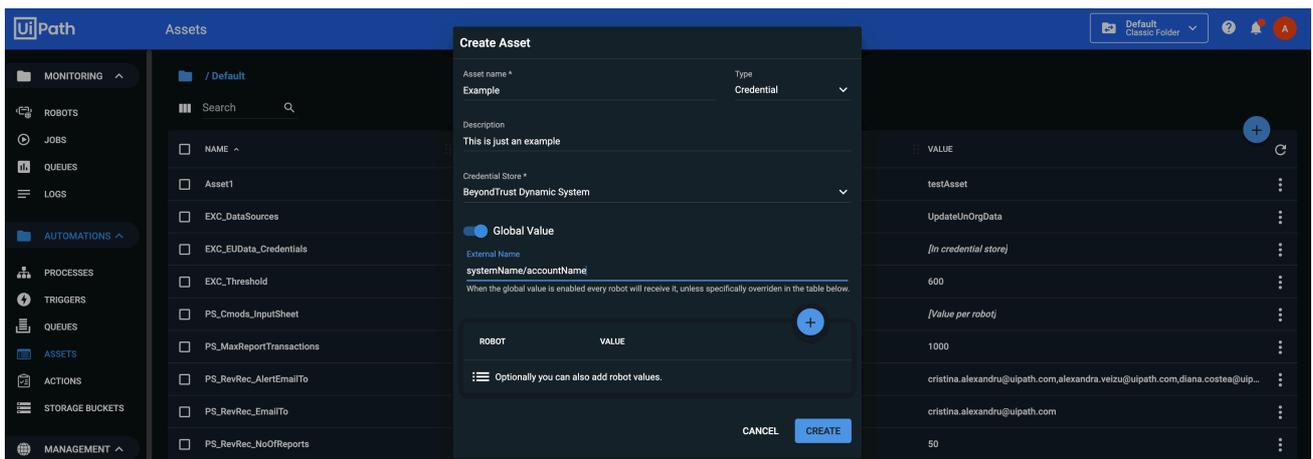
5. You can also head to Robots, create a new Robot, select your Credential Store from the "Orchestrator Store" field, manually fill the username and fill in the "External Name" accordingly (see page 3 for Single System vs Dynamic System), for the plugin to retrieve the password from Beyond Insight: