# SETUP GUIDE UIPATH-BEYONDTRUST CREDENTIAL STORE PLUGIN

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## **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). <u>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).</u>

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: "<u>mySystem/andrei.cristea@uipath.com</u>".

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:

MENU	BeyondInsight Configuration	tions
<b>A</b>	API REGISTRATIONS	UiPath Details
<b>~</b>	<b>Q</b> Search Registrations	Name UiPath
	Create New API Registration 🔂	Key 🕑 🕃
	Showing all 1 API Registrations	
-	⊘ UiPath (Active)	Active 🔮
		Authentication Rule Options
a.		
*		
പ്		User password required 😧
°.		Verify PSRUN signature 🔞
		Authentication Rules (5)
		<ul> <li>Cosech Authantientian Dulae</li> </ul>
		SAVE CHANGES DISCARD CHANGES

2. Create an Authentication Rule to allow incoming connection to API from UiPath:

≡ Веу	rondInsight     Configuration       BeyondTrust     General - API Registrations	0
n → 	***       • 3         • Authentication Rule Options       IP Rule         • Enforce multi-factor authentication •       • P Rule         • User password required •       • *Forwarded-For Rule         • Verity PSRUM signature •       • *Forwarded-For Subel         Authentication Rules (s) •       • * State ***********************************	~

3. Create a new Group for UiPath Service Account(s) and add these Features:

MENU	BeyondInsight Configuration	Sroup: UPath		0
<b>#</b> ↓	GROUP: UIPATH Has 0 users Active O Group not provisioned		C 🖋	Û
-≙ -∎ -₽	Group Details Details & Attributes Eastwar(2)	Features  Snow Enabled Features Filter by		•
∎÷ ©	Smart Groups Users	2 items □ Feature Name ▲ Permission	0	::
ம்  லீ	API Registrations	Pasavord Safe Account Read only     Pasavord Safe Role Read only     Management Read only		I Î
0		K 4 Page 1 of 1 > H 100 V Items per page	1 - 2 of 2 i	, items

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:

MENU	BeyondInsight Configuration					0
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▲ ▲ ▲ ▲ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦ ♦	Smart Groups Permissions  Smart Enabled Smart Groups  A Assign Permissions  Items (1 selected)  Smart Group Name A  All Assess in Peasword Safe	Type Asset	Organization	Permission Full control	Password Sofe Roles	All Assets In Password Safe Password Safe Roles A role is the connection between a Password Safe user accurater and a managed system. A role defines what the user or group can do with respect to that managed system. Imaged system Imaged sys
ள் °°	All Managed Accounts       All Managed Systems       H        Page     1       of 1     >       N     100 ♥       Items per page	Managed Account Managed Syssem	Global	Read only Full control	1 : 0 :	

5. Add the API Registration to the Group:

≡ Веуо	Configura	ON tnt Group: UiPath	0
GROU	P: UIPATH Has 0 users Ø Active		2 🖉 🛍
<ul> <li>▲ Group</li> <li>▲ Details &amp;</li> <li>▲ Feature:</li> <li>▲ Smart G</li> <li>♥ Smart G</li> <li>♥ Users</li> <li>and</li> <li>API Regi</li> <li>♥</li> </ul>	Details Attributes (3) oups (3) trations (1)	<ul> <li>API Registrations          <ul> <li>Manage API Registrations</li> <li><i>Filter API Registrations</i></li> <li>Showing 1 API Registrations (1 selected)</li> <li>UIPath</li> </ul> </li> </ul>	

MENU	BeyondInsight Configuration	ser: ulpath		0
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*	User Details	Groups 🛛		
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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**:

MENU	BeyondInsight						Ma	O nage Smart Rules
<ul> <li>ת</li> <li>ת</li> <li>ת</li> <li>ת</li> </ul>	MANAGED SYSTEMS Smart Group fitter All Managed Systems  Create New Managed System						c 🛓 🛙	. • ::
<b>a</b> ₽	3 items System A app02	IP Address	Entity Type	Platform	<b>Workgroup</b> Default Workgroup	Auto Managed	Description	1
	bdeb.brucloud UPeth	1.2.3.4	Domain Asset	Active Directory Windows	Default Workgroup	© 	btlab UiPath READ WRITE plugir	
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	I of 1 ► H 100 ♥ Items per page							- 3 of 3 items

8. The Managed Accounts you are going to use with UiPath need to have **API Enabled**:



 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:

Add Credential Store
Type *
BeyondTrust-DynamicSystem-ReadOnly
Name *
BeyondTrust Example
BeyondTrust Host URL *
https://beyondtrust.example.com
API Authentication Key *
hj4kg2j5g34hj5b23n5j234lk5m324n6l2k3l4j523n4lk23n5lkj2345bkj23l4n5
API Run As *
Use SSL certificate *
O True O False
System-Account Delimiter *
Managed Account Type *
system 🗸
CANCEL

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:

Credential Stores			Classic Folder V	
<ul><li>Tenant</li><li>Search Q</li></ul>				
NAME ¢	туре \$	ROBOTS DEFAULT STORE	ASSETS DEFAULT STORE	C
Orchestrator Database	Database			:
BeyondTrust Dynamic System	BeyondTrust-DynamicSystem-ReadOnly			:
BeyondTrust Single System	BeyondTrust-SingleSystem-ReadOnly			:
			Items 10 - 1-3/3  < <	

(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):

UiPath	Assets	Create Asset			🗈 Default v ? ?
	/ Default	Asset name * Example	<sup>Type</sup> Credential ∽		
JOBS		Description This is just an example		- XALUE	e.
E LOGS	Asset1	Credential Store * BeyondTrust Dynamic System	~	testAsset	
AUTOMATIONS ^	EXC_DataSources	Global Value		UpdateUnOrgData	
PROCESSES	EXC_Threshold	External Name systemName/accountName/ When the global value is enabled every robot will receive it, unless spec	cifically overriden in the table below	600	
	PS_Cmods_InputSheet			[Value per robot]	
ASSETS	PS_MaxReportTransactions	ROBOT VALUE		1000	
ACTIONS	PS_RevRec_AlertEmailTo	:= Optionally you can also add robot values.		cristina.alexandru@uipath.com,alexandr	a.veizu@uipath.com,diana.costea@uip
STORAGE BUCKETS	PS_RevRec_EmailTo			cristina.alexandru@uipath.com	
MANAGEMENT ^	PS_RevRec_NoOfReports		CANCEL	50	

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:

	DESCRIPTION	SETTINGS
All 🗸	<b>Create a new standard robot</b> Creating a standard robot allows it to work on a si	ngle standard machine.
	Machine * CitizenDev3	~
	<sub>Name *</sub> Example Bot	
	Description	
	Unattended	~
	Credential Store * BeyondTrust Dynamic System	~
	Domain\Username * john.doe@example.com	
	External Name systemName/accountName	
	Create another	CANCEL CREATE