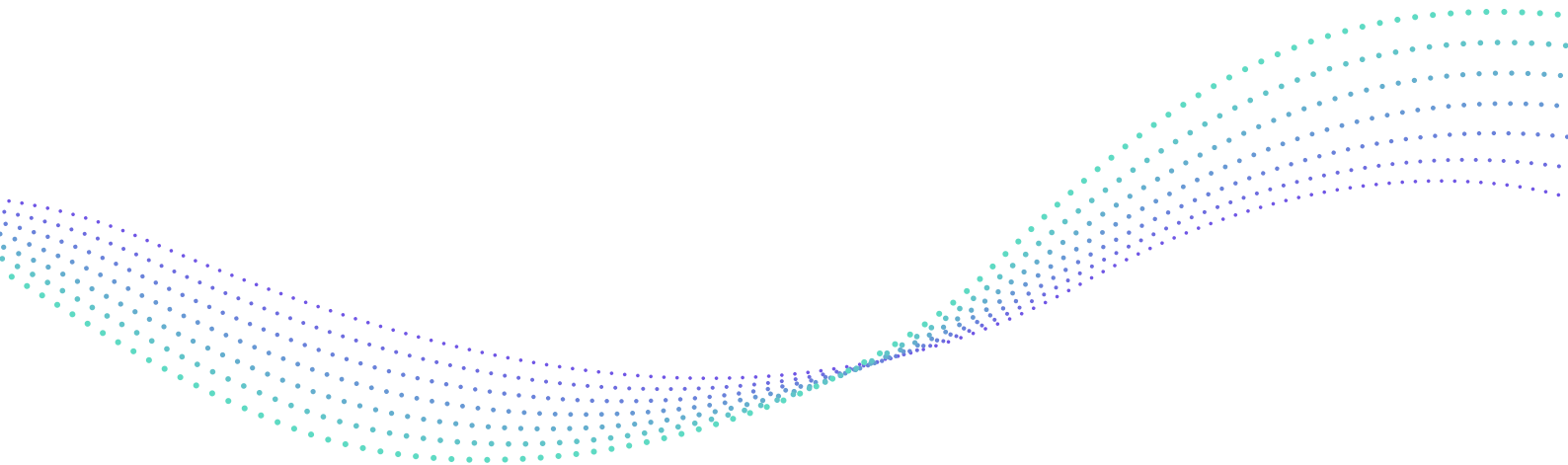




OrbusINFINITY

ORBUSINFINITY INSTALLATION
GUIDE



Product Release Information

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If you have any queries, you can contact the Orbus Software by email:

support@orbussoftware.com

Contents



1	How to use this guide.....	5
2	Reference materials.....	5
3	Application interaction overview	6
3.1	Authentication.....	7
4	Prerequisites and requirements	8
4.1	Application requirements.....	8
Desktop browsers		8
Visio Add-in		9
Export and Import Tools		10
4.2	Microsoft 365 and Azure requirements.....	11
SharePoint Online.....		12
Azure AD Enterprise App.....		13
Orbus Professional Services access		15
OrbusInfinity Knowledge Base access setup.....		16
5	Installation overview	17
6	Customer environment setup.....	18
6.1	SharePoint site setup.....	18
6.2	SharePoint Connector App installation.....	19
7	OrbusInfinity site provisioning.....	22
8	Permission grants and Add-in setup	23
8.1	Azure AD permissions.....	23
8.2	User provisioning.....	25
Configure user provisioning.....		25
Manage OrbusInfinity users		29

8.3	Turn off Assignment required option	29
8.4	Import and Export Tools installation.....	30
9	Solutions Hub installation	31

1 How to use this guide

The OrbusInfinity Installation Guide contains reference on how OrbusInfinity interacts with your environment and installation instructions to prepare for OrbusInfinity integration to your systems.

This guide is intended for Project Lead, SharePoint Site Collection Administrator, Office 365 Administrator, and Azure AD Administrator.

Tips, information of special importance, and information that may apply only in special cases can be found in Note . Information that is essential to the completion of a task or to access the feature can be found in Important Note .

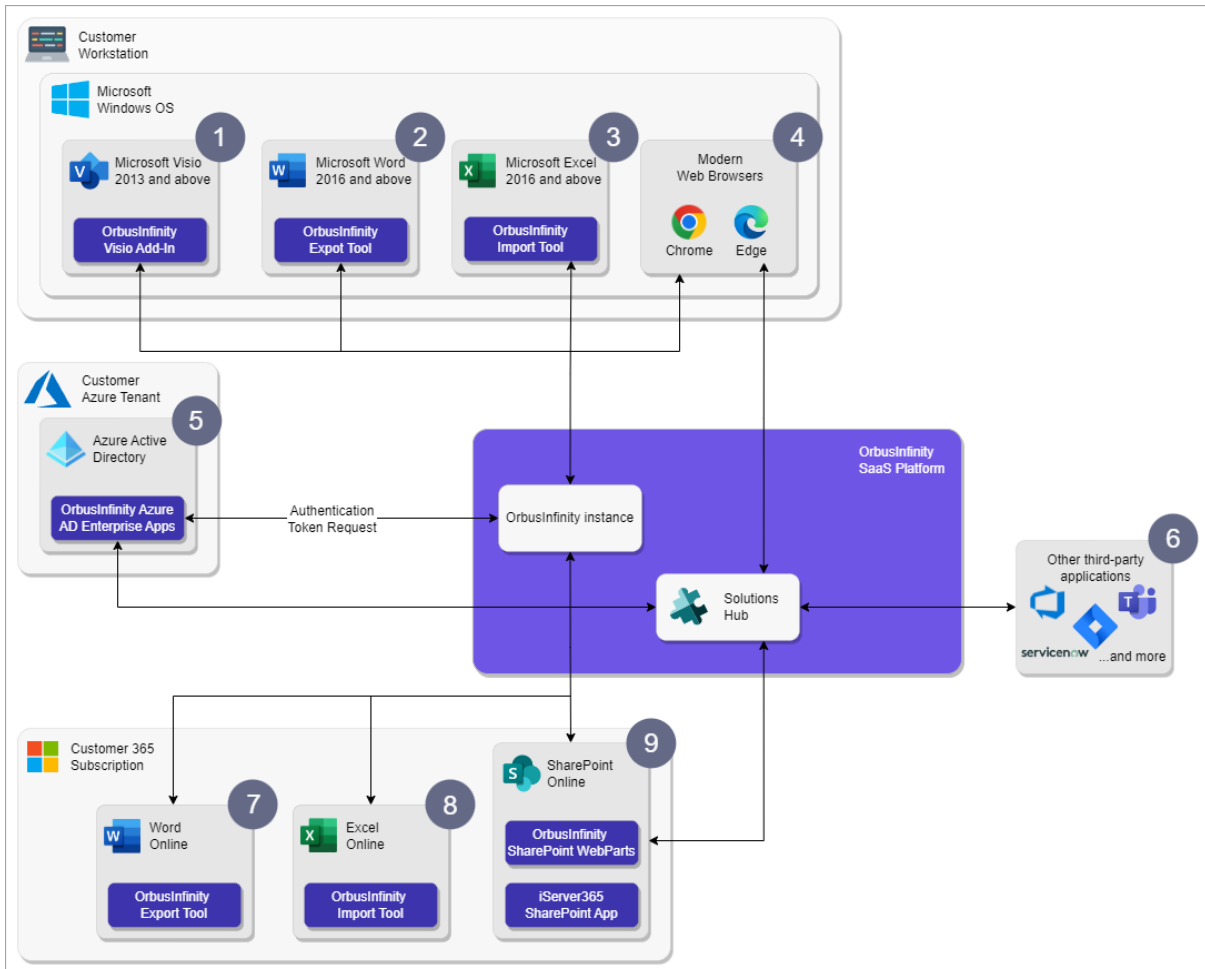
2 Reference materials

As OrbusInfinity is tightly integrated with Microsoft products, we recommend to get acquainted with available guides and training on Office products:

- ◆ [Microsoft 365 help and training](#)
- ◆ [Visio help center](#)
- ◆ [Word help center](#)
- ◆ [Excel help center](#)
- ◆ [SharePoint help center](#)

3 Application interaction overview

OrbusInfinity is a cloud-based application that provides seamless integration with your existing Microsoft 365 application suite and Azure Active Directory using the following integration points:



1	OrbusInfinity Visio Add-In	To provide a modeling environment that synchronizes data with the OrbusInfinity repository.
2	OrbusInfinity Export Tool	To enable the export of data from the OrbusInfinity repository into a Word document.
3	OrbusInfinity Import Tool	To enable the import of data into OrbusInfinity from the Excel desktop.
4	Modern Web Browsers	To use the OrbusInfinity application portal for repository management.
5	Azure Active Directory Enterprise Applications	To authenticate users, request Tokens, and enable user and group management in OrbusInfinity.
6	Other third-party applications	Business tools that you can integrate with the Solutions Hub to realize key use cases.

7	OrbusInfinity Export Tool	To enable the export of data from the OrbusInfinity repository into an online Word document.
8	OrbusInfinity Import Tool	To enable the import of data into OrbusInfinity from your Excel files stored in the cloud.
9	SharePoint 365 Applications	To provide OrbusInfinity functionality via web parts, enhanced Visio Online document viewing, and to enable interaction with documents without the need to store them in OrbusInfinity.

3.1 Authentication

OrbusInfinity operates with Microsoft Azure technologies to best integrate into Microsoft 365 and your existing Azure infrastructure.

OrbusInfinity uses the OAuth 2.0 protocol to authenticate users against your existing Active Directory to confirm that they are indeed valid and to allow OrbusInfinity to access resources on their behalf. This means that the management of user access can remain in the control of your Azure AD administrators.

Also, users can access OrbusInfinity using their existing Microsoft 365 accounts. This removes the need for extra user accounts specific to OrbusInfinity itself.

Any controls and security measures that you have applied to your Active Directory will apply to access OrbusInfinity, such as Two-Factor Authentication.

The application uses the [implicit grant flow](#).

4 Prerequisites and requirements

For smooth installation of OrbusInfinity, complete all of the below requirements first:

- ◆ [Application requirements](#) – Set up access to OrbusInfinity web application and Office Add-ins
- ◆ [Microsoft 365 and Azure requirements](#) – Configure necessary integrations and access permissions

4.1 Application requirements

The following are required to access the OrbusInfinity web application and use the ancillary Office Add-ins for performing tasks such as Visio diagram creation, data export to Word, and Excel data import.

Desktop browsers

The OrbusInfinity application is a web application that is fully responsive on the following desktop browsers:

- ◆ Google Chrome (latest)
- ◆ Microsoft Edge (Chromium, latest)

Visio Add-in



Important

Target audience of the below requirements is your organization's **Desktop Team**.



Important

You can experience unexpected behavior with the Visio Add-in if the most recent Windows updates are not installed. Ensure that your PC is fully up to date.

The OrbusInfinity Visio Add-in is an embedded Visio solution with custom commands and features to visualize your repository data on diagrams.

Name	Count
Actor	10189
Process	4730
Assessment	2639
Technology	2322

Download Visio Add-in MSI installer

To be able to install Visio Add-in, you need to have the below in place.

Requirement	Description
MSI installer downloaded	<ul style="list-style-type: none"> ◆ Visio Add-in requires installing locally on users' machine via an MSI installer. Download this from your OrbusInfinity web application (<i>see the screenshot above</i>). ◆ If your organization has blocked the ability to install applications on user machines, the Visio Add-in will require central distribution by your system administrator.
Supported Visio version	<ul style="list-style-type: none"> ◆ Visio 2013 (v15.0; Professional) ◆ Visio 2016 (v16.0; Professional, Office 365) ◆ Visio Online Plan 2 (Desktop, Office 365) ◆ Visio 2019 (v16.0; Professional) ◆ Visio 2021 (Professional)

Requirement	Description
	To obtain Microsoft 365 application's version number, select File > Account . In the lower-right corner of the window in the About panel, the current value is specified.
.NET Framework v4.8	Verify you have this version of software or higher installed to be able to use the Add-in.
Visual Studio 2010 Tools for Office Runtime installed	To run the Visio Add-in, you need Visual Studio 2010 Tools for Office Runtime installed. You can download the latest version from the Microsoft Download Center .
Your OrbusInfinity environment added to the Allow List	OrbusInfinity doesn't support proxy authentication at the moment. If you use a proxy server that requires authentication, add your company's OrbusInfinity environment URL to your organization's Allow List for the Visio Add-in to communicate with OrbusInfinity.

Export and Import Tools



Important

Target audience of the below requirements is your organization's **Office 365 Admin Team**.

The OrbusInfinity Export Tool (or Word Add-in) allows to insert OrbusInfinity data into Microsoft Word documents. With the OrbusInfinity Import Tool (or Excel Add-in), you can bulk import—create and update—data to OrbusInfinity, using the same file.

To integrate the tools with OrbusInfinity, review the below:

Requirement	Description
Supported versions	<ul style="list-style-type: none"> ◆ Online clients (included as part of Microsoft 365 subscriptions) ◆ 365 Edition 64bit or 32bit ◆ Office 2016 Professional Plus Edition (v. 16.0.8067)
Add-ins access policy	<p>Export Tool and Import Tool are supplied via the Office Add-in interface and do not require a traditional installer. The add-ins are added to your Office Add-in Store for users with the correct Microsoft 365 licenses to access them in both Online and supported Desktop clients.</p> <p>If your organization blocked access to Office Add-in, refer to the <i>Centralized Deployment requirements</i> below.</p>
Configure Centralized Deployment requirements	<p>You need to deploy Office Add-ins to users and groups within your organization. For this, you need to make sure Centralized Deployment requirements are properly configured in your tenant.</p> <p>We recommend that your system administrator follows the Microsoft guidelines to confirm the compatibility with this deployment approach.</p>
Access the Add-ins online	<p>If you want to use the add-ins online too—via Word or Excel Online clients, ensure to have a Microsoft 365 license that grants access to Microsoft 365 Online.</p>

4.2 Microsoft 365 and Azure requirements

In scope of Microsoft 365 and Azure requirements set, you need to configure below:

- ◆ [SharePoint Online](#) to set up one of the major OrbusInfinity integrations
- ◆ [Azure AD Enterprise App](#) to configure permissions for OrbusInfinity web application and Solutions Hub
- ◆ [Orbus Professional Services access](#) to get ready your OrbusInfinity environment
- ◆ [OrbusInfinity Knowledge Base access setup](#) to enable users' access to the Knowledge Base

SharePoint Online



Important

To complete the below requirements, you need to be assigned **administrator rights in your SharePoint tenant**.

SharePoint is one of the OrbusInfinity integration points where you store documents and collaborate with colleagues on repository data. It facilitates the collection and update of data and makes it accessible for contributors across your organization.

To set up SharePoint integration with your OrbusInfinity repository, consider the below requirements.

Requirement	Description	Purpose
Create a dedicated SharePoint Online Site Collection within your SharePoint Online Tenant	<ul style="list-style-type: none"> ◆ This site must use the <i>Communication Site</i> template. ◆ Make sure to add the <i>iServer</i> string to the SharePoint Online Site Collection's description or URL, for the Solutions Hub to identify your site collection correctly. 	<p>You and people in your organization will use this Site Collection to publish and view documents, topics, events, and projects.</p> <p>With the SharePoint Online Site Collection, you will be able to reach out to data contributors and keep your data up-to-date, using convenient methods.</p>
Create an App Catalog	Scope an App Catalog to the SharePoint Online Site Collection.	An App Catalog holds all OrbusInfinity SharePoint apps in a single space. You must have it in place for the SharePoint Tenant administrators to manage permissions and usage of the applications and update when new features are released.
Install OrbusInfinity SharePoint Connector App	This application provides Full Control to the SharePoint Online Site Collection to which OrbusInfinity will be linked.	Connector App enables integration between OrbusInfinity and SharePoint. It also allows to install, maintain, and update SharePoint web parts and extensions.

Azure AD Enterprise App



Important

Target audience of the below requirements is your organization's **Azure AD administrator**.

OrbusInfinity uses enterprise application in your Azure AD tenant to authenticate users and to request access to Microsoft 365 resources.

Permission request type	Description
Application Permissions	Enables the OrbusInfinity Azure AD Enterprise App to perform actions within the scope of the applied permissions set requested by our App. These are granted by your Azure AD Administrator at the point of installation.
Delegated Permissions	Enables the OrbusInfinity Azure AD Enterprise App to perform actions within the scope of the currently logged in user's permissions set, on their behalf.

You need to grant different sets of permissions for the two below enterprise applications:

- ◆ [OrbusInfinity web application](#)
- ◆ [Solutions Hub](#)

4.2.1.1 OrbusInfinity

The following permission sets are requested by the OrbusInfinity enterprise application in Azure AD tenant.

Permission request type	Permissions	Description
Office 365 SharePoint Online: Delegated Permissions	Read items in all site collections	The requested permission is a delegated permission, which means that OrbusInfinity will access SharePoint on behalf of the logged-in user and at most can only access entities that the logged-in user has access to. To ensure that OrbusInfinity only accesses documents within the configured OrbusInfinity SharePoint Site Collection, all SharePoint access is governed to go through an Orbus internal service which guarantees that any access is solely limited to the configured OrbusInfinity site collection.
Microsoft Graph: Application Permissions (optional)	<ul style="list-style-type: none"> ◆ Read all users' full profiles ◆ Read group memberships 	These enable your designated OrbusInfinity Administrator to import users and groups from your Azure AD into the application. These are only requested if not using the Azure AD user provisioning functionality.

4.2.1.2 Solutions Hub

The following permission sets are requested by the Solutions Hub enterprise application in Azure AD tenant.



Note

You need to enable the below permissions *only* if you use integration with the Solutions Hub.

Permissions type	Permissions	Description
Microsoft Teams: Delegated Permissions	<ul style="list-style-type: none"> ◆ Read the names and descriptions of teams ◆ Read the names and descriptions of channels ◆ Read users' relevant people lists 	These enable Solutions Hub users to read the names and descriptions of teams and channels, on behalf of signed-in user and allows the app to read a scored list of people relevant to the signed-in user. The list can include

Permissions type	Permissions	Description
		local contacts, contacts from social networking or your organization's directory, and people from recent communications (such as email and Skype).
Microsoft Project Online and SharePoint: Delegated Permissions	Read items in all site collections	This enables Solutions Hub to track documents and list items in all site collections on behalf of the signed-in user. It's scoped to ensure user-specific document permissions within Project Online and SharePoint are upheld.
Microsoft Planner: Delegated Permissions	Read user's tasks and task lists (preview)	This enables Solutions Hub to read the signed-in user's tasks and task lists, including any shared with the user. Doesn't include permission to create, delete, or update anything.

Orbus Professional Services access



Important

To complete the below requirements, you need to be assigned **administrator rights in Azure AD and SharePoint**.

To *set up and customize your OrbusInfinity environment*, provide an Orbus Professional Services Consultant with access to:

- ◆ your OrbusInfinity environment, with the administrative role
- ◆ OrbusInfinity SharePoint site, with the Site owner role

OrbusInfinity and SharePoint use Azure AD for authentication/authorization. Because of this the Consultant will either need a *guest account* or an *organizational account* in your Azure AD tenant.

◆ Guest account

A guest account is an external account that, on behalf of a guest, accesses specific resources in your Azure AD tenant.

To add a guest account, an Azure AD Administrator should send an invitation to the Consultant. Then, the Consultant will be able to access your Azure AD tenant resources with their Orbus Software Azure AD account.



Note

SharePoint permissions may block guest accounts' access to SharePoint sites. Check with your SharePoint admin if external sharing to guest accounts is blocked on your SharePoint tenant. If so, set up an organizational account for the Consultant.

◆ Organizational account

An organizational account is the same type of account that the users in your organization have. To set up an organizational account, create an Azure AD account for the Consultant as if they are a member of your organization.



Note

Your organization may have an application or approval process to create an organizational account.

Consult your Azure AD Admin to decide what option is best for your organization.

Regardless of the account type set up for the Consultant:

1. **In Azure AD**, assign the Consultant the administrator role in OrbusInfinity enterprise application created during the post-installation call with an Orbus Software Support team member.
2. **On SharePoint site used for OrbusInfinity**, grant the Consultant with the *Site Owner* permissions for the SharePoint site used for OrbusInfinity.

OrbusInfinity Knowledge Base access setup



Important

To complete the below requirements, you need to be assigned **administrator** or **global administrator rights in Azure AD**.

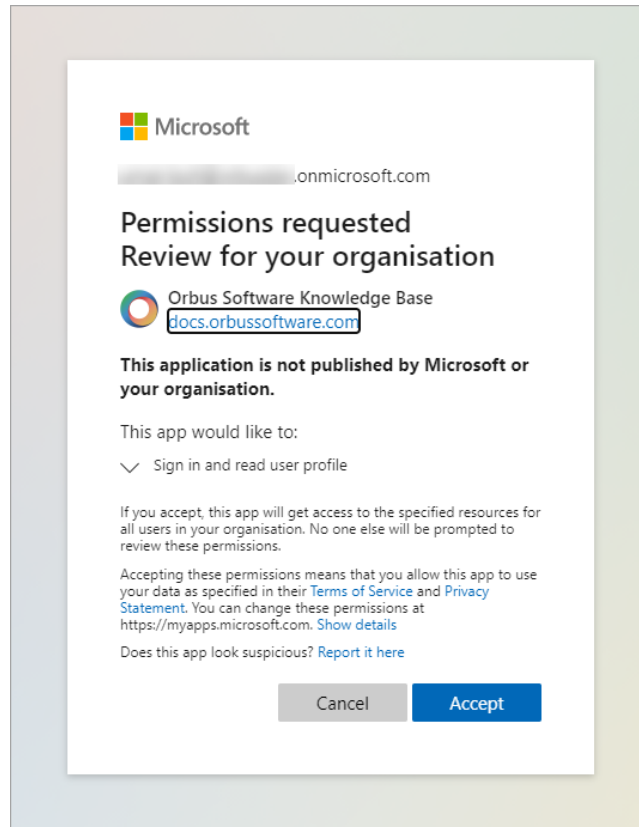
For your users to access the KB, some Azure AD permissions must be granted to the KB by each user.

With default Azure AD settings, the required permissions do not require Admin consent and users are able to approve the permissions themselves when first logging in to the KB.

You may however choose to do the permission grant on behalf of all your users, thereby preventing users from having to go through this process. Alternatively, your Azure AD settings may have been modified to prevent users approving apps themselves, in which case you will need to do this on their behalf.

To carry out the permission grant for all of your users:

1. Go to the [Knowledge Base](#) and log in using an account with Azure AD Global Administrator rights.
2. Review and grant the permissions.



5 Installation overview

There are four key stages to provision an OrbusInfinity instance and integrate it with your Microsoft 365 environment which must occur sequentially:

1. [Customer environment setup](#)

Usually, SharePoint Administrator and Azure AD Global Administrator prepare your SharePoint site with which OrbusInfinity will interact, and install the SharePoint Connector App.

2. [OrbusInfinity site provisioning](#)

After receiving all prerequisite information from your Administrators our support engineers create an OrbusInfinity instance that is configured to work with your users and integrate into your Microsoft 365.

3. [Permission grants and Add-ins setup](#)

Azure AD Global Administrator with guidance from our support engineers enables the OrbusInfinity access to the required Azure AD permissions on your environment and the deployment of Visio and Excel Add-ins. These steps can be completed in less than thirty minutes offline or during a call with our engineers.

4. [Solutions Hub installation](#)

Solutions Hub is a cloud platform that provides Solutions to business challenges related to common enterprise transformation. It presents a catalog of ready-made Solutions to provide outcomes for various enterprise architecture and transformation use cases, systems, and roles.

6 Customer environment setup

This section describes the steps required by your Microsoft 365 and Azure AD Administration Team to prepare your environment for the OrbusInfinity application interaction:

- ◆ [SharePoint site setup](#)
- ◆ [SharePoint Connector App installation](#)



Note

Once you complete the instructions in the next section, our engineers will proceed with the creation of an OrbusInfinity instance. Ensure to gather all the required information in the end of the section and send it to your Orbus account manager or technical contact.

6.1 SharePoint site setup



Important

To perform the following procedure, you must be a **SharePoint Administrator**.



Note

To create the Site Collection App Catalog, it's required that your SharePoint site contains a Tenant App Catalog. For more details on how to set up the Tenant App Catalog, go to [Microsoft SharePoint documentation](#).

1. Create a new SharePoint Site Collection using the *Communication Site Modern* template.
2. Create an App Catalog scoped to the Site Collection:
 - a. Download and install the SharePoint Management Shell **cmdlets** from [Microsoft](#). You must have SharePoint Administrator permission, which can be assigned via Azure Portal (Azure Active Directory > User > Directory role).

- b. Open a PowerShell window and run the following commands:




```
Connect-SPOService -Url "SharePoint Admin Site URL"
Add-SPOSiteCollectionAppCatalog -Site "SharePoint OrbusInfinity Site URL"
```

Where *SharePoint Admin Site URL* is the URL of the Microsoft 365 SharePoint Admin Centre that you have accessed during the SharePoint Site Collection creation. This URL is usually the SharePoint instance name with *-admin* appended.

For example, if the SharePoint instance URL is <https://contoso.SharePoint.com/>, *SharePoint Admin Site URL* would be <https://contoso-admin.SharePoint.com/>.

SharePoint OrbusInfinity Site URL is the URL of the SharePoint site that you created, for example <https://contoso.SharePoint.com/sites/OrbusInfinity>.

You can view a new "Apps for SharePoint" container in the Site Contents of the Site Collection.

Contents		Subsites		
Name ↑	Type	Items	Modified	
 Apps for SharePoint	List	3	5/19/2021 5:04 PM	
 iServer365 Applications	App		3/31/2021 2:26 AM	
 iServer365 WebParts	App		3/31/2021 2:26 AM	

3. Enable external site sharing for the newly created SharePoint site, so Orbus Professional Services Consultants can access it. For more information, see this [Microsoft guide](#).



Note

Make sure to add Orbus Consultants as Site Owner of the newly created SharePoint site, so they are able to upload content and carry out configuration.

6.2 SharePoint Connector App installation



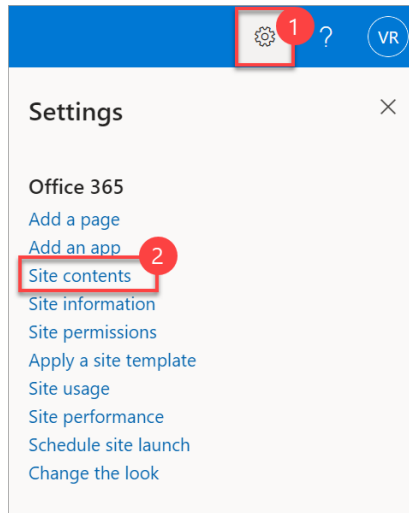
Important

To complete the below requirements, you need to be assigned **administrator rights in your SharePoint tenant**.

To enable integration between OrbusInfinity and SharePoint, install the SharePoint Connector App to the SharePoint site App Catalog. This also allows OrbusInfinity to install, maintain, and update its SharePoint web parts and extensions. To install the SharePoint Connector App:

1. Download the app at <https://static.iServer365.com/sharepoint-connector/prod/iServer365.SharePointConnector.app>.
2. Open Site Collection, created in the *SharePoint Site Setup* section earlier. For example, <https://contoso.SharePoint.com/sites/OrbusInfinity>.

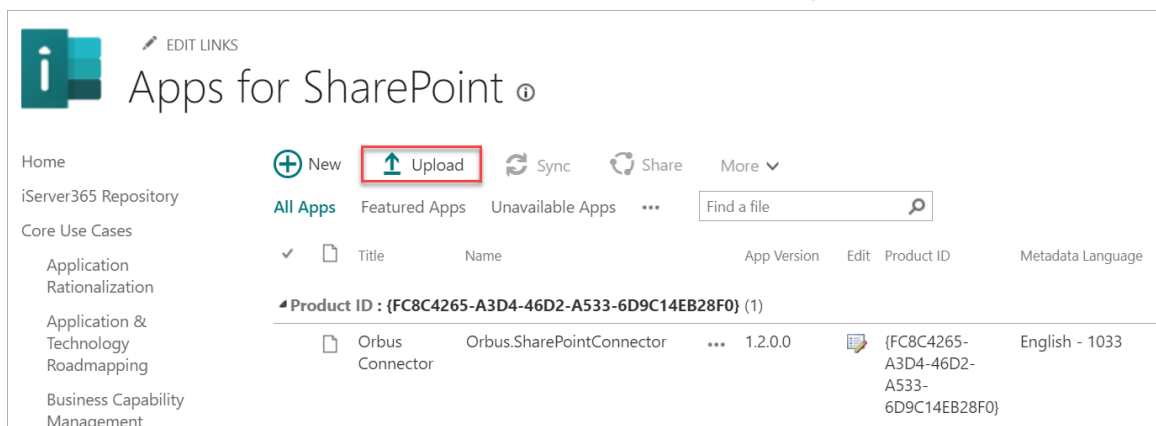
3. Open the Site App Catalog:
 - a. In the upper-right corner, select **Settings** > **Site Contents**.



- b. Select **Apps for SharePoint**.

Contents		Subsites		
Name ↑	Type	Items	Modified	
Apps for SharePoint	List	3	5/19/2021 5:04 PM	
iServer365 Applications	App		3/31/2021 2:26 AM	
iServer365 WebParts	App		3/31/2021 2:26 AM	

4. Upload the app, downloaded in *Step 1*, to the Site App Catalog.

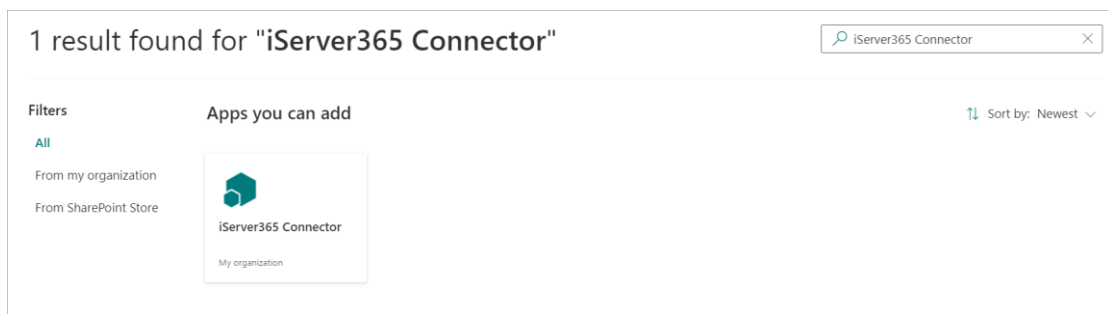


Important

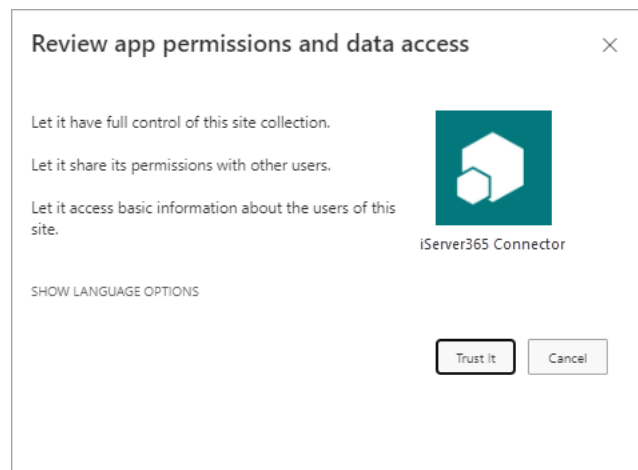
Ensure you upload the app to the *Site Collection App Catalog* – not Tenant App Catalog.

5. Install the app to the Site:
 - a. Open the SharePoint Site and in the upper-right corner, select **Settings** > **Add an app**.

- b. In the search box, type **iServer365 Connector** and select the app.



- c. In the dialog box that opens, review the permissions and select **Trust it**.



7 OrbusInfinity site provisioning



Important

Target audience of the below requirements is your organization's **Project Lead**.

To enable OrbusInfinity support engineers to create an application instance integrated to your Microsoft 365 environment, collect the following information and send it to your Orbus account manager:

- ◆ Azure Tenant ID
- ◆ Azure Tenant Name
- ◆ URL of the SharePoint site OrbusInfinity will integrate with
- ◆ Confirmation that the SharePoint Connector App has been deployed
- ◆ Whether you have an Azure Active Directory Premium P1 or P2 license

This determines the ability to use Azure AD user provisioning for user management in Azure AD. This lowers the permission demands of the application and is the preferred approach to user management.

- ◆ Confirmation of Azure AD Guest User Accounts for Orbus Consultants
If you can't assign Guest users to Orbus Consultants, then we need temporary users in your Azure AD instead and the following information:
 - ◆ Azure AD ID
 - ◆ Username
 - ◆ Temporary Passwords

Your account manager passes this information to the Orbus Support Engineer responsible for your installation so that they can proceed with creating an OrbusInfinity instance.

8 Permission grants and Add-in setup



Important

To complete the below requirements, you need to be assigned **administrator** or **global administrator** rights in Azure AD.

To complete this stage of the installation, Orbus Support Engineers contact you to:

- ◆ [Grant Azure AD permissions for OrbusInfinity](#)
- ◆ [Configure User Provisioning](#)
- ◆ [Turn off Assignment required? option](#)
- ◆ [Install the Import Tool \(Excel Add-in\) and Export Tool \(Word Add-in\)](#)

This section describes the process of permission grants and Add-ins setup steps; however, we can also offer this via an installation call if required.

8.1 Azure AD permissions

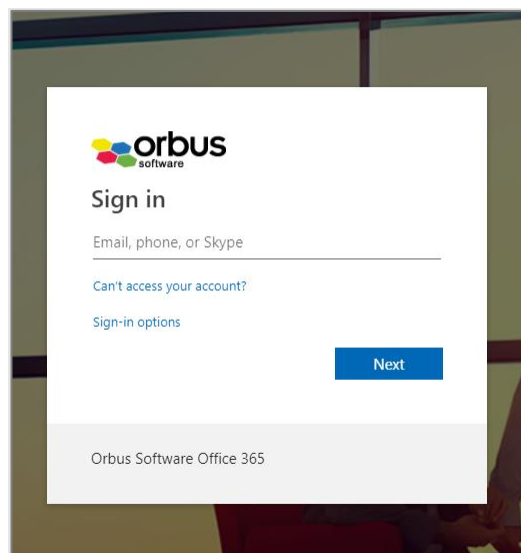


Important

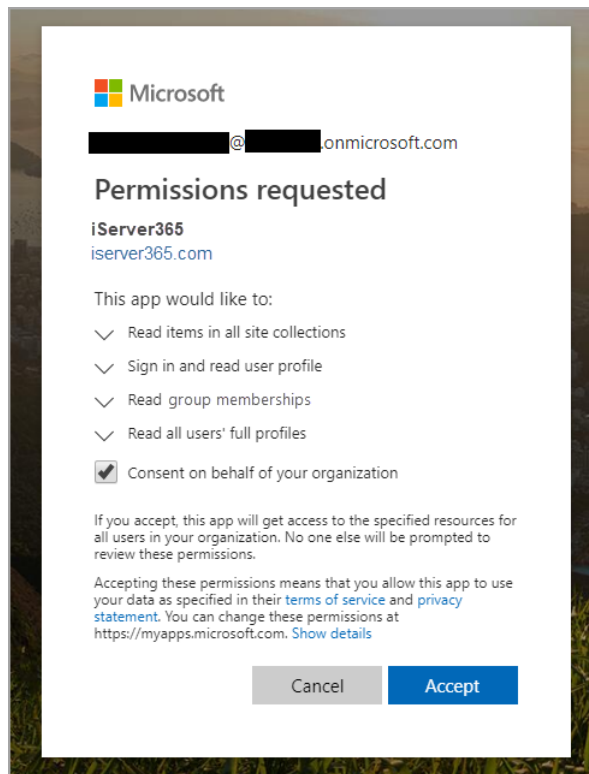
To perform the following procedure, you must be an **Azure AD Global Administrator**.

To enable interaction with your Microsoft 365 environment, Orbus Support Engineers direct the Global Administrator to the OrbusInfinity login page where the permission grant is complete:

1. Open OrbusInfinity, and on the login page, enter the Global Administrator credentials.



2. Review and grant permissions.



Note

The bottom two permissions, *Read group memberships* and *Read all users' full profiles*, are optional and might not be listed in this window.

8.2 User provisioning



Important

To complete the below requirements, you need to be assigned **administrator** or **global administrator rights in Azure AD**.

Azure User Provisioning uses SCIM—an industry-wide standard for managing user identities in cloud-based applications.

Configure user provisioning

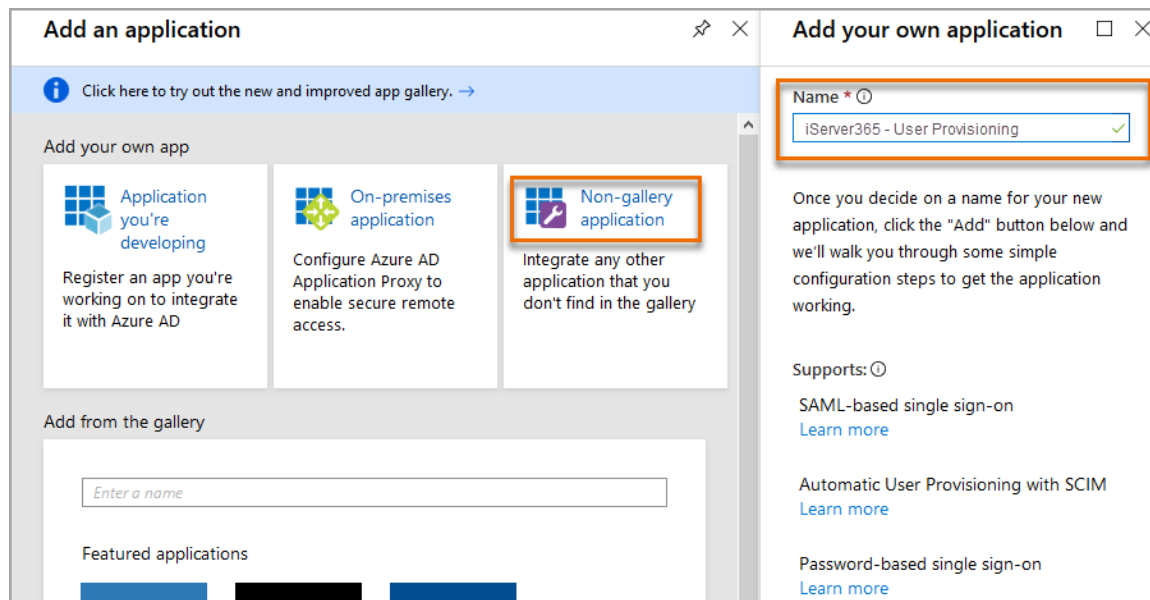


Note

To perform the following procedure, you must be an Azure AD Global Administrator and have an Azure AD Premium P1 or P2 license.

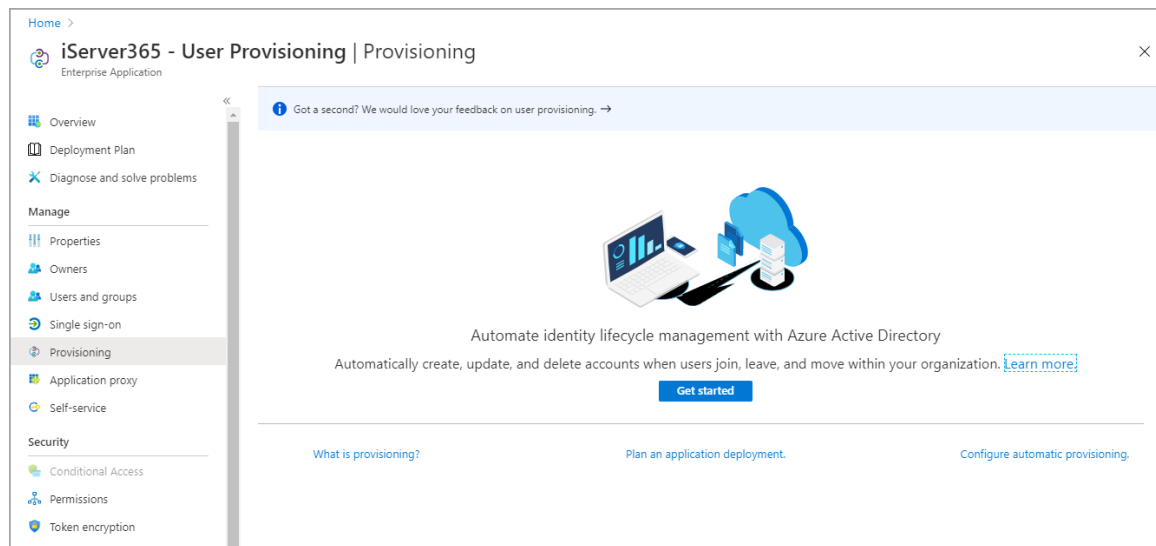
1. In the Azure Portal, on the **Azure Active Directory Enterprise Application** blade, select **New application**. Alternatively, select the following link to go to the correct location:
https://portal.azure.com/#blade/Microsoft_AAD_IAM/AppGalleryApplicationsBlade/category/topapps
2. Under **Add your own app**, select **Non-gallery application** and enter a name for the new application and select **Add**.

Orbus recommends using *iServer365 – User Provisioning* as the application's name.

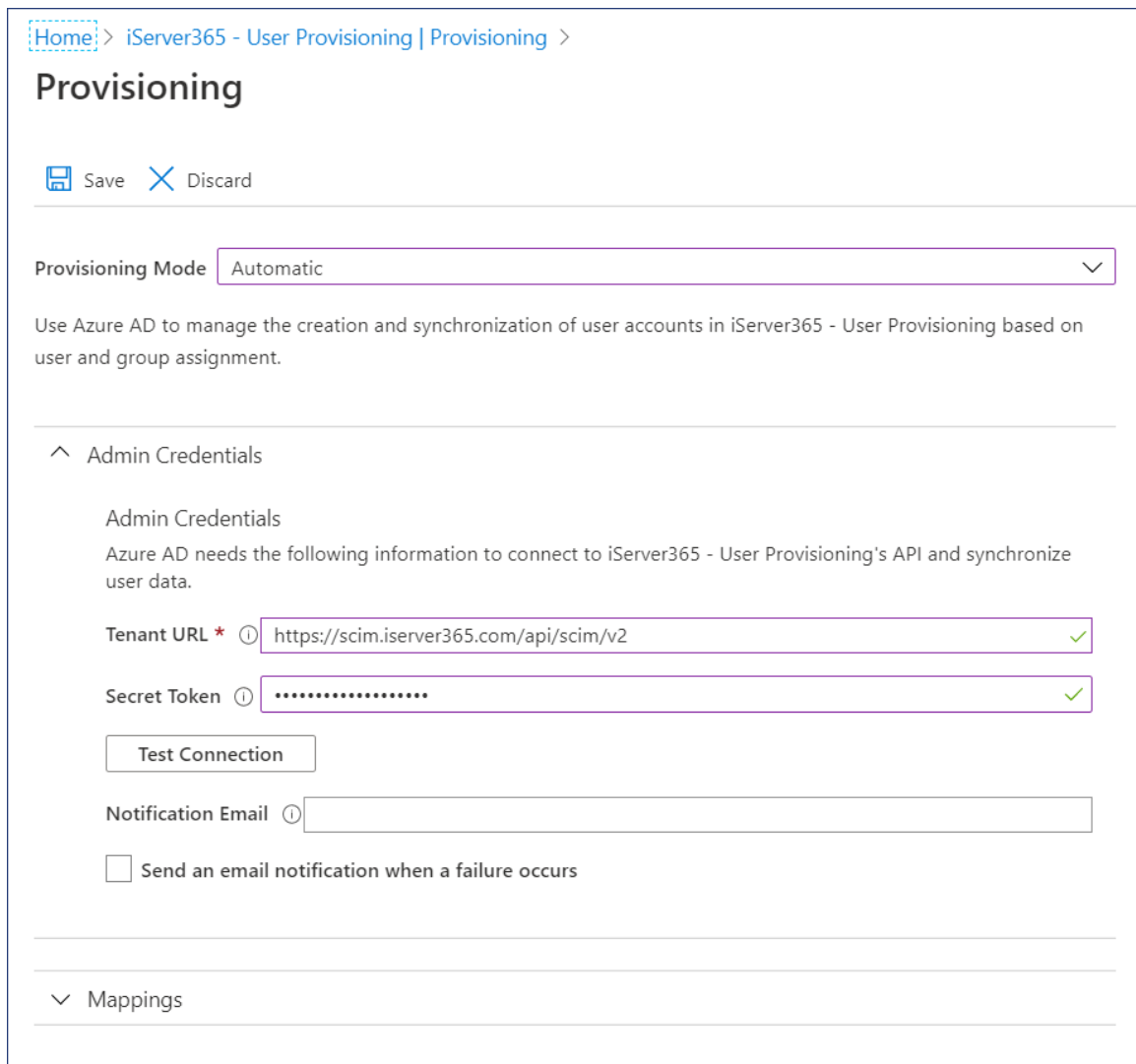


The screenshot shows the 'Add an application' dialog in the Azure Portal. The 'Add your own application' section is expanded, and the 'Non-gallery application' option is selected. The 'Name' field is populated with 'iServer365 - User Provisioning'. The 'Add' button is visible at the bottom right of the dialog.

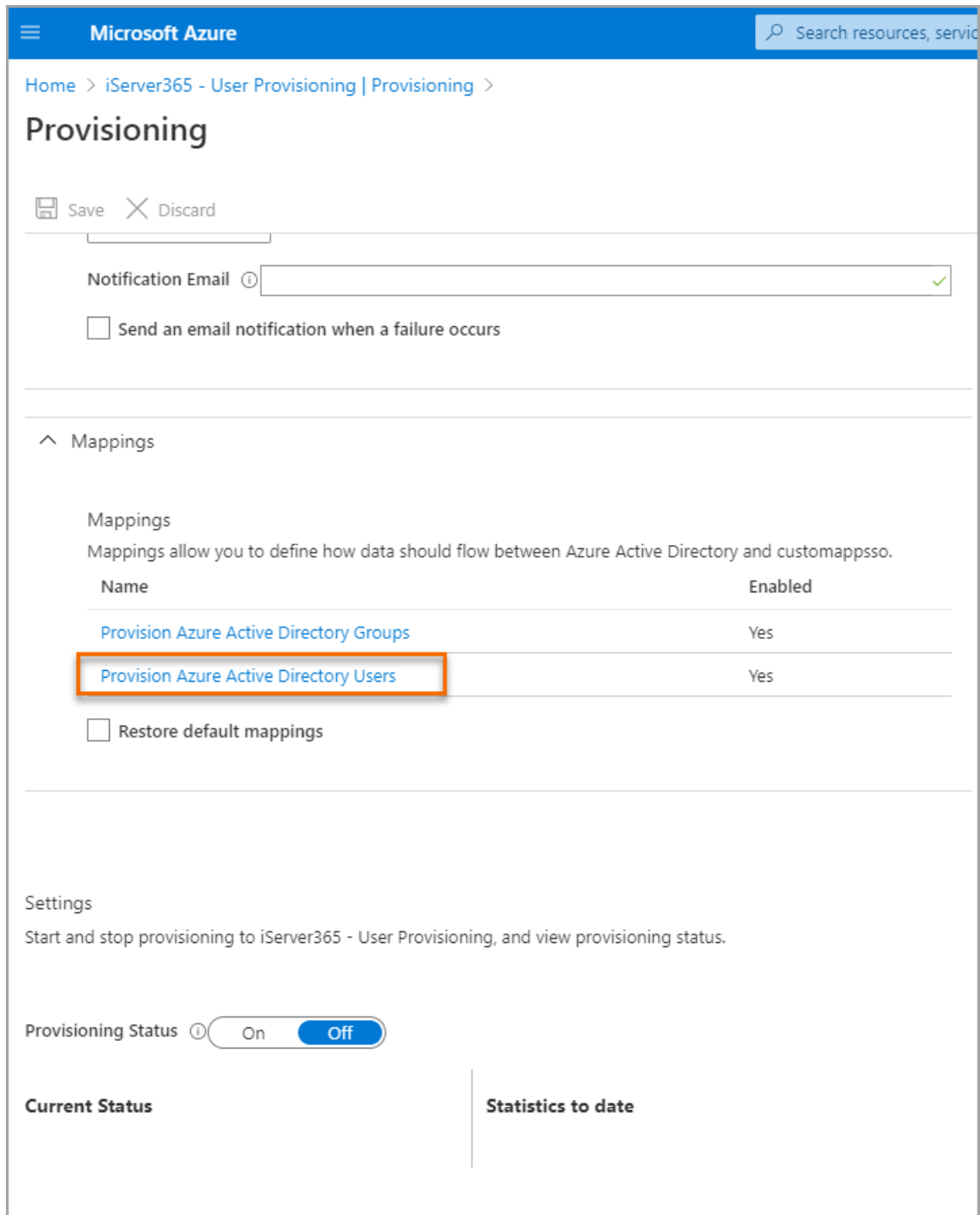
- When the application is created, in the **Provisioning** section, select **Get started**.



- To view additional fields, in the **Provisioning Mode** list, select **Automatic**.
- Under **Admin Credentials**, in the **Tenant URL** and **Secret Token** fields, enter details provided by Orbus and select **Test Connection**.



- After the test is run successfully, on the toolbar, select **Save**.
- Under **Mappings**, select **Provision Azure Active Directory Users**.



Microsoft Azure

Home > iServer365 - User Provisioning | Provisioning >

Provisioning

Save Discard

Notification Email ✓

Send an email notification when a failure occurs

^ Mappings

Mappings

Mappings allow you to define how data should flow between Azure Active Directory and customappsso.

Name	Enabled
Provision Azure Active Directory Groups	Yes
Provision Azure Active Directory Users	Yes

Restore default mappings

Settings

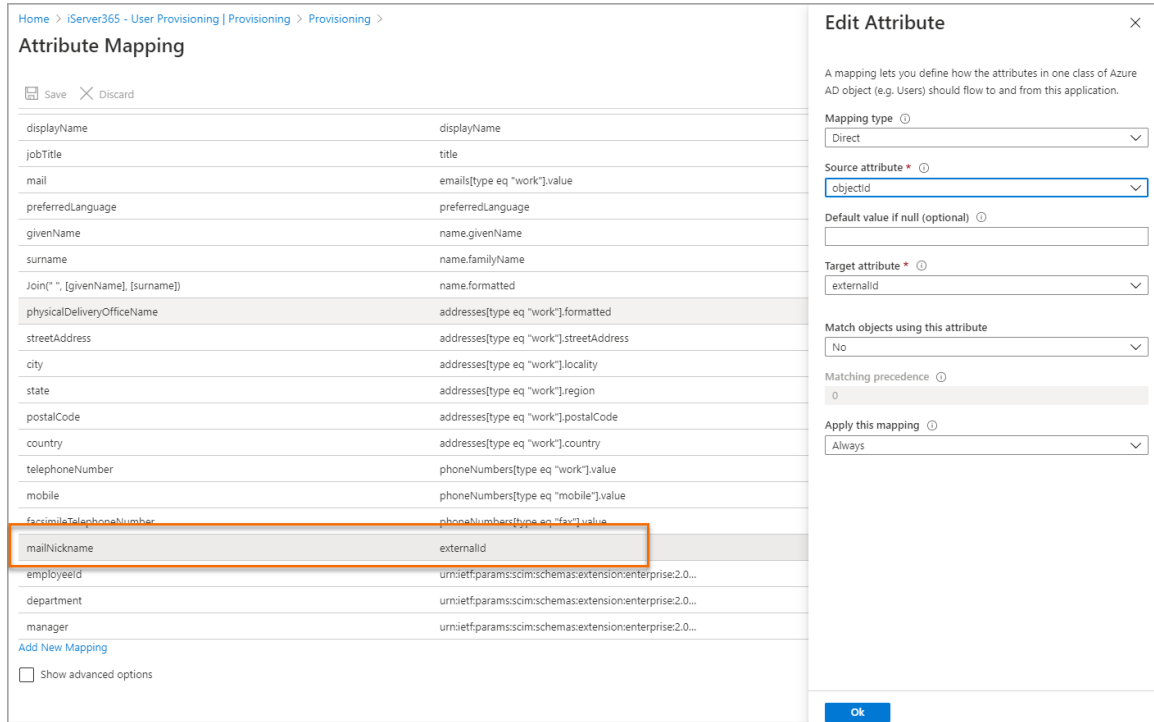
Start and stop provisioning to iServer365 - User Provisioning, and view provisioning status.

Provisioning Status On Off

Current Status | **Statistics to date**

- In the **Attribute Mapping** window, select the **mailNickname** attribute that is set to **externalId**.

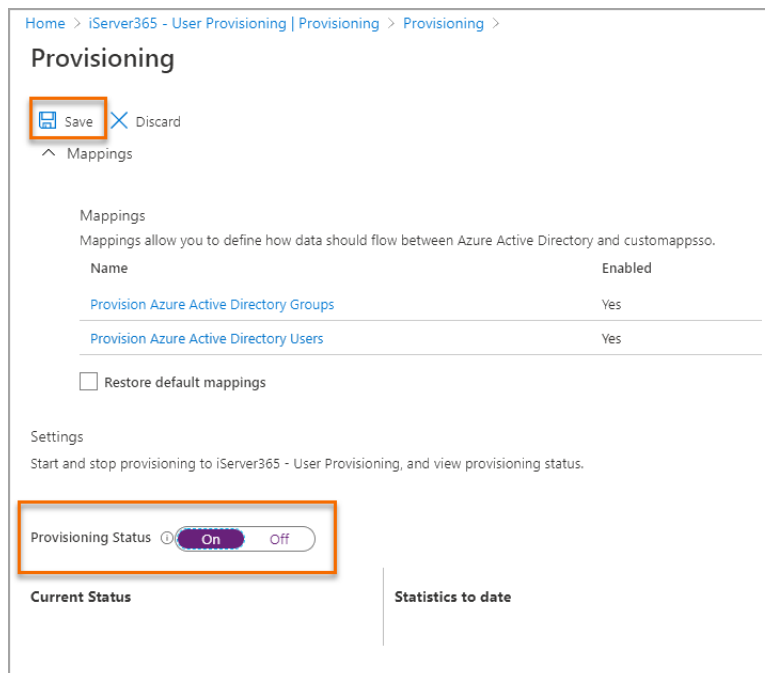
9. In the **Edit Attribute** dialog box, in the **Source attribute** list, select **objectId**, and select **OK**.



The screenshot shows the 'Attribute Mapping' interface with a table of mappings. The 'mailNickname' attribute is highlighted with an orange box. To the right, the 'Edit Attribute' dialog is open, showing 'objectId' selected as the source attribute and 'externalid' as the target attribute.

Source Attribute	Target Attribute
displayName	displayName
jobTitle	title
mail	emails[type eq "work"].value
preferredLanguage	preferredLanguage
givenName	name.givenName
surname	name.familyName
Join(" ", [givenName], [surname])	name.formatted
physicalDeliveryOfficeName	addresses[type eq "work"].formatted
streetAddress	addresses[type eq "work"].streetAddress
city	addresses[type eq "work"].locality
state	addresses[type eq "work"].region
postalCode	addresses[type eq "work"].postalCode
country	addresses[type eq "work"].country
telephoneNumber	phoneNumbers[type eq "work"].value
mobile	phoneNumbers[type eq "mobile"].value
facsimileTelephoneNumber	phoneNumbers[type eq "fax"].value
mailNickname	externalid
employeeid	urn:ietf:params:scim:schemas:extension:enterprise:2.0...
department	urn:ietf:params:scim:schemas:extension:enterprise:2.0...
manager	urn:ietf:params:scim:schemas:extension:enterprise:2.0...

10. To save attribute mappings, on the toolbar, select **Save**.
11. Set the **Provisioning Status** to **On**, and on the toolbar, select **Save**.



The screenshot shows the 'Provisioning' settings page. The 'Save' button is highlighted with an orange box. Below, the 'Provisioning Status' is set to 'On', also highlighted with an orange box.

Provisioning

Save Discard

Mappings

Mappings allow you to define how data should flow between Azure Active Directory and customappsps.

Name	Enabled
Provision Azure Active Directory Groups	Yes
Provision Azure Active Directory Users	Yes

Restore default mappings

Settings

Start and stop provisioning to iServer365 - User Provisioning, and view provisioning status.

Provisioning Status On Off

Current Status Statistics to date

Azure AD is now ready to [provision users into OrbusInfinity](#).

Manage OrbusInfinity users

After you configured the user provisioning, you can add users to OrbusInfinity. To do this, open the enterprise application created in the previous procedure ([Configure user provisioning](#)) and in **Users and groups** section, add or remove users and groups.

The changes are then synchronized over to OrbusInfinity by the Azure Active Directory provisioning engine.

Note



The synchronization engine runs on a schedule and changes can take up to 40 minutes to synchronize across to OrbusInfinity.

8.3 Turn off Assignment required option

For applications created in Azure AD the Assignment required? option defines whether all users (both members and guests) and apps or services can access them. By default, this option is set to **No** which **we recommend not to change**.

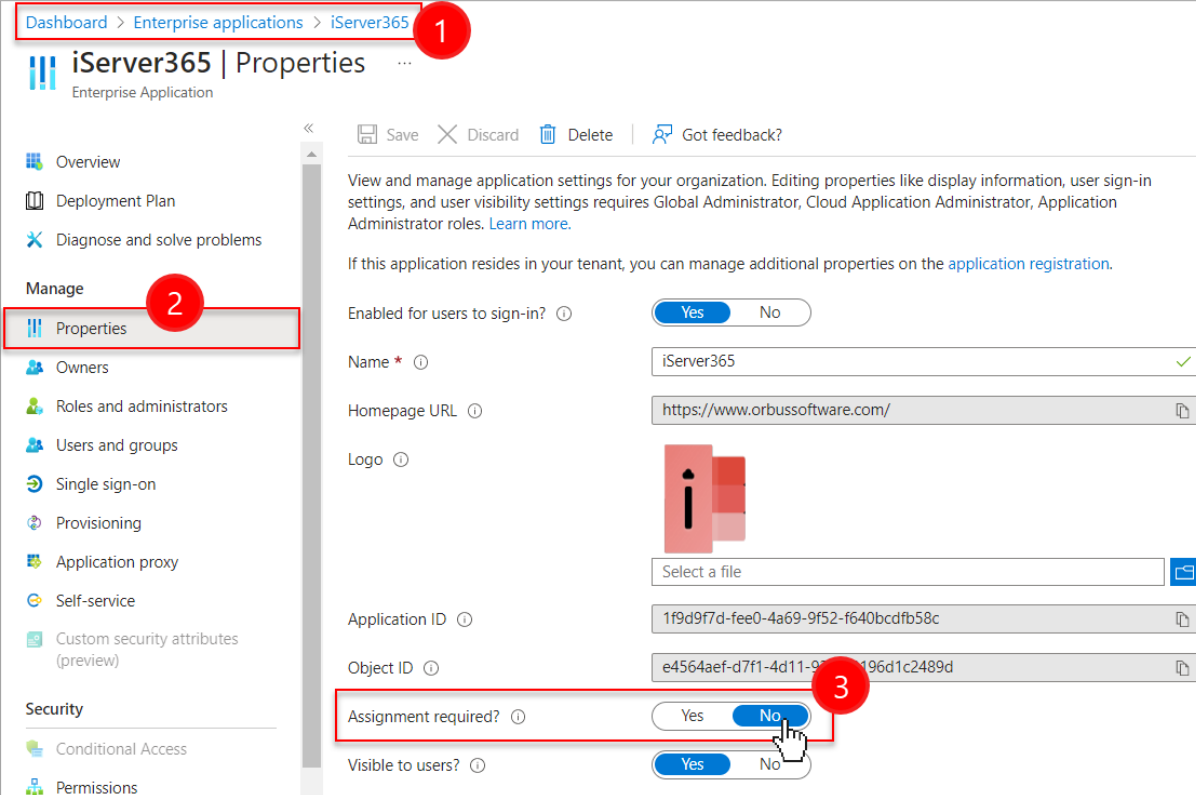
For security reasons, some customers set the option to Yes which might cause unexpected issues. Among others, preventing connected applications, such as Solutions Hub, from authenticating in to OrbusInfinity.

Therefore, this is highly recommended to keep this setting default.



Note

To be able to modify the Assignment required? option, you must be an Azure AD Global Administrator and have an Azure AD Premium P1 or P2 license.



Dashboard > Enterprise applications > iServer365

iServer365 | Properties

Enterprise Application

Save Discard Delete Got feedback?

View and manage application settings for your organization. Editing properties like display information, user sign-in settings, and user visibility settings requires Global Administrator, Cloud Application Administrator, Application Administrator roles. [Learn more](#).

If this application resides in your tenant, you can manage additional properties on the [application registration](#).

Enabled for users to sign-in? Yes No

Name *

Homepage URL

Logo

Application ID

Object ID

Assignment required? Yes No

Visible to users? Yes No

8.4 Import and Export Tools installation



Important

To perform the following procedure, you must be an **Office 365 Administrator**.



Note

This step is optional and only required if the Office 365 Store is disabled for Users.

The tools use the new cross-platform Office JS API. Unlike the older Office COM Add-Ins, the add-ins do not require an installer to the user's machine. Microsoft recommends managing all new application deployments via Office 365 Centralized Deployment. This guarantees the easiest and cleanest integration with your copy of Office, both Online and Desktop.

1. Deploy the add-ins to your Microsoft 365 Admin Center:

- a. Log into the Microsoft 365 Admin Center.
- b. In the navigation menu, select **Settings > Integrated Apps**.
- c. At the top of the page, select **Add-ins**.
- d. On the **Add-ins** page, select **Deploy Add-in > Next**.
- e. On the **Deploy a new add-in** page, select **Choose from the Store**.
- f. In the search box, type **OrbusInfinity Import Tool** or **OrbusInfinity Export Tool**, and in the search results, select **Add > Continue**.
- g. Select who can have access to the add-ins and select **Deploy**. It's strongly recommended that the person deploying the add-ins adds themselves to the list of users to help simplify deployment validation. The add-ins are now available to the users you selected

2. Validate deployment:

- a. Open Excel or Word (either desktop or online) and start a new workbook or document.
- b. On the **Insert** tab, select **My Add-ins** (or **Add-ins** for online).
If the installation is successful and all the requirements are met, the Add-In is now available under the **Admin Managed** section.

9 Solutions Hub installation



Important

To complete the below requirements, you need to be assigned **administrator** or **global administrator** rights in Azure AD.

OrbusInfinity comes with a catalogue of ready-made Solutions to accelerate the realization of key use cases in OrbusInfinity, called Solutions Hub. The Solutions can be deployed into your OrbusInfinity environment by repository administrators and authors in a self-service manner.

To set up access to the Solutions Hub:

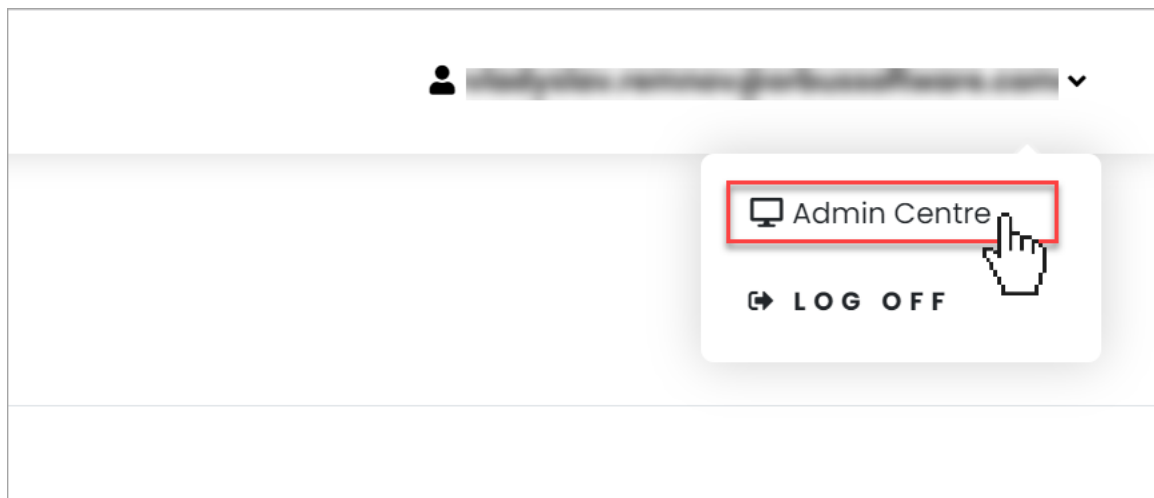
1. Go to <https://hub.orbussoftware.com/<InstanceName>> and sign in using your Microsoft account.



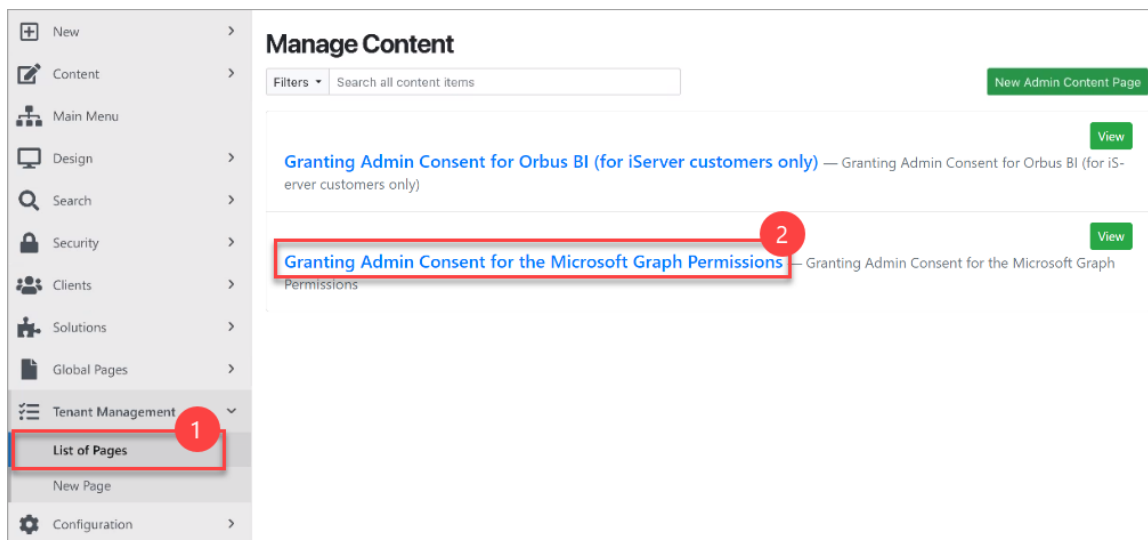
Note

Replace the [<InstanceName>](#) placeholder with your organization's instance of Solutions Hub. Orbus Support will communicate the URL of your Solutions Hub instance during the OrbusInfinity installation.

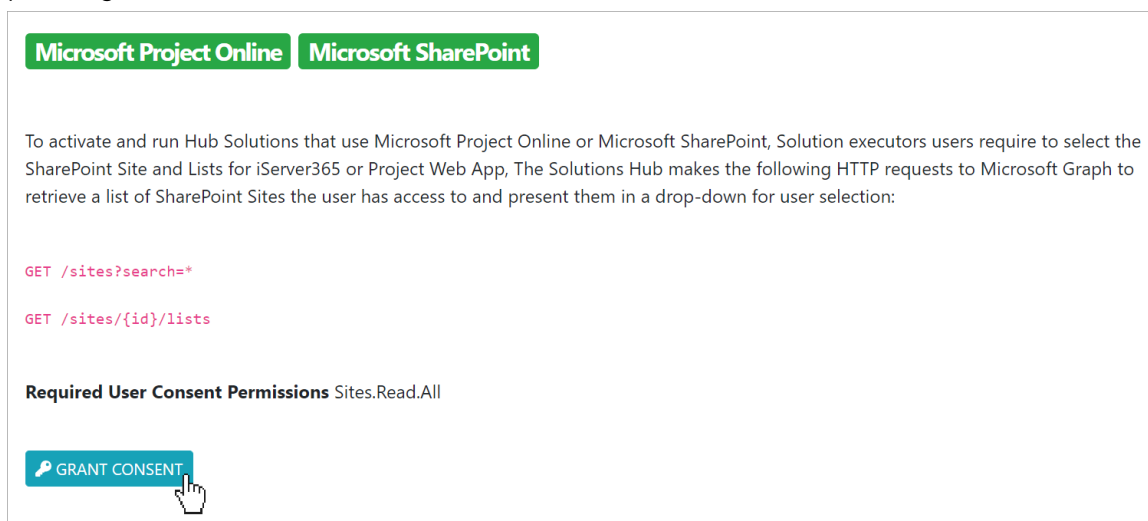
2. Once logged in, in the upper-right corner of the page, select your account drop-down and select **Admin Centre**.



- In the navigation pane, select **Tenant Management > List of Pages**, and then select **Granting Admin Consent for the Microsoft Graph Permissions**.



- The page that opens provides an overview of how Solutions Hub interacts with Microsoft Graph and the list of the Microsoft Graph permissions required for using certain integration solutions with the Microsoft365 applications. Review the permissions and select **GRANT CONSENT** for each application. This will grant admin consent to the Solutions Hub for the specific delegated Graph permissions on behalf of all users of your organization.



In practice, the Microsoft Graph permissions used by the Solutions Hub do not require admin consent. Users that will activate and run solutions can grant those permissions individually for most organizations. In some particular cases, certain organizations, in the Azure AD settings, have disabled the ability for the end users to directly grant consent for any Graph permissions to third-party applications. They then require an Azure AD Global Administrator to grant admin consent instead. In that case, the Azure AD Global Administrator can grant admin consent for all permissions needed to the Solutions Hub using this page in the Admin Centre.