

## STREAMLINING PROVISIONING OF OCS DEPLOYMENTS

Issue#1: Provisioning Request Origination

Issue#2: Customizable Provisioning Workflows

Issue#3: Re-provisioning or Change Management

Issue#4: Multiple Levels of Help Desk Support

Issue#5: Audit & Compliance

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## STREAMLINING PROVISIONING OF OCS DEPLOYMENTS

Microsoft Corporation's award-winning Office Communications Server 2007 (OCS) is a significant advancement in streamlined communications that combines email, instant messaging, conferencing, and voice communications onto a single, unified platform. While the decision by enterprises to implement this solution is a sound one, planning an OCS deployment and rollout for a mid to large (10,000+ seat) enterprise is complicated at best and daunting at its worst.

System administrators tasked with this project must carefully evaluate capacity requirements, network topology, telephony deployment scenarios, and various other considerations before they can assemble a project plan for an OCS rollout.

As administrators work through various phases of the plan, they almost always neglect the provisioning or on-boarding process, which eventually becomes a gating item for their rollout.

Some administrators may be able to skirt around a number of provisioning challenges by working through the native Active Directory or OCS management interface. For most mid to large organizations, unfortunately, it will be almost impossible to handle all the provisioning requests manually. This white paper highlights key OCS provisioning issues organizations must deal with and discusses how Ensim Unify OCS 2007 Manager can help address those issues, facilitating a smooth and seamless OCS rollout.

## KEY PROVISIONING ISSUES FACING ORGANIZATIONS

### **Issue #1: Provisioning Request Origination**

Each enterprise has existing policies, mechanisms, and business processes for triggering new-hire or on-boarding requests. This request management mechanism must be updated to address OCS provisioning for new hires.

System administrators, typically, have a tailored request management system. In most cases, however, it is a variation on one of the following three scenarios:

- 1) The HR system is often the first IT system to be seeded with the new-hire information. This usually triggers a request to provision various IT services such as email, telephone, access card, etc. for the new employee. Some of these services may require manual approvals and might be addressed offline. An administrator will have to augment this new-hire process to further add OCS provisioning requests for new employees automatically based on their entitlements. For example, a remote worker may be enabled for Enterprise voice whereas marketing or sales professionals may be enabled for conferencing and live meeting.
- 2) Because of additional Microsoft Client Access License (CAL) implications or additional management overhead, some enterprises may not want to rollout OCS for all employees and may want to implement a charge-back mechanism for business units or cost centers before OCS access is enabled for requested employees. Typically, in such cases an administrator has to update an existing intranet website or build a new one for managers to request OCS service for their direct reports or create a self-registration page for employees. These intranet pages should be further integrated with the charge-back systems to make sure that the cost center or the business unit is billed accordingly.
- 3) Additionally, an enterprise might have an ERP system or identity management framework implemented that will have to be updated to trigger OCS provisioning requests as new employee identities are created in the IT systems.

### **Ensim Addresses Interoperability**

Ensim Unify OCS Manager provides a provisioning overlay that integrates quickly with existing ID management solutions, HR portals, intranets, and ERP solutions.

OCS Manager has robust extensibility through web-service application programming interfaces (APIs). These APIs implement most web services (WS-\*) standards, enabling interoperability with any existing system and allowing system administrators to address any of the scenarios mentioned above. OCS Manager uses role-based, delegated administration to ensure that IT policy and security requirements are met—from system administrators defining resource pools all the way down to end-use, self-service management of group chat lists.

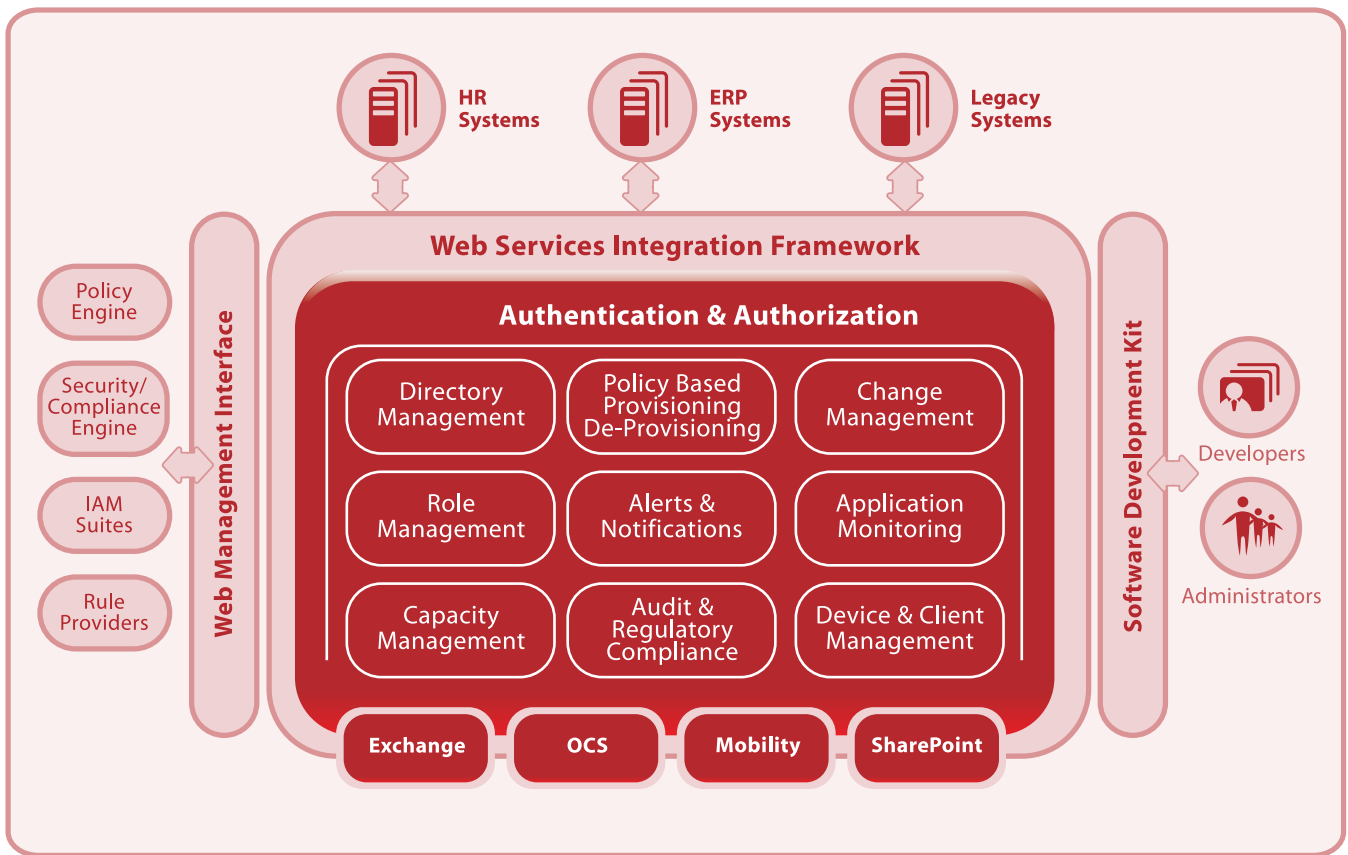


Figure 1 - Ensim Unify Enterprise Edition Architecture

As show in the diagram above, all communication in and out of Ensim Unify goes through a layer of web services. This provides complete interoperability between Unify and any existing Enterprise systems. Using web services, Unify can be configured to trigger updates into any enterprise system or receive provisioning/administration requests for OCS management.

## **Issue # 2: Customizable Provisioning Workflows**

Once administrators have resolved integration issues with their request management systems, the next challenge they face is how to customize the provisioning workflow based on policies. Most enterprises have various business rules and regulations that drive entitlements for all users. In regulated environments (particularly in financial services and healthcare), these rules can be very complex and strictly enforced. Typically, these business rules define the various OCS options that will be enabled for each user and the OCS server pool on which the user account is provisioned. A global enterprise can have various considerations (e.g., geographical location, service level agreement [SLA] committed, department or project group) in determining the server-pool location while processing the provisioning request. Similarly, OCS entitlements could be a combination of some of these considerations.

The Microsoft OCS administration interface provides the capability to execute simple provisioning requests. It is limited, however, in its ability to enforce and automate the full provisioning process. As a result, administrators often must implement manual processes or develop custom scripts for tracking available telephone extensions or server pools.

### **Ensim Delivers Customizable Provisioning**

Unify's extensible and automated provisioning workflows have been designed to address all of these customization issues. The pre-built workflow included with Unify OCS Manager has simple configuration settings that allow system administrators to quickly customize the provisioning process to meet their individual requirements. These workflow-enabled user templates allow administrators to have a phased rollout of various OCS features without writing multiple scripts or going through complex deployment procedures. This one-click, template-based role provisioning allows system administrators to easily integrate Ensim Unify with their entitlement engine and at the same time hide the complexity of the deployment process from junior administrators.

Additionally, Ensim Unify offers automated capacity management to implement OCS server pool allocation based on various internal rules. For example, a global enterprise may want to provision users in server pools based on geographical location. In another scenario a consulting or services organization may want to allocate users based on their project assignments. Unify's provisioning allocation algorithms allow system administrators to seamlessly enforce these rules.

### **Issue # 3: Re-provisioning or Change Management**

On a typical day, the IT help desk in a mid-to-large enterprise may handle hundreds of support incidents related to user configuration updates. Depending on the business rules and regulations, some of these updates can be complex and time consuming to handle. There are three broad categories for these support incidents:

- 1) ***Updating the use configuration settings for a user.*** A user may have been promoted or moved to a different project, changing the user's entitlements. Or perhaps the user account was initially misconfigured and now needs to be synchronized with their entitlements and configured accordingly. In either of these scenarios an administrator has to manually correct the configuration settings for the user account.
- 2) ***Implementing a phased rollout of OCS features.*** Often system administrators begin with an initial set of features for a small group of people and later expand the coverage to a larger group with more and more features. Planning a phased rollout has always been a maintenance nightmare for administrators.
- 3) ***Improving business processes.*** Continuous improvement efforts by system administrators eventually result in changes in entitlements for existing users or re-provisioning of user accounts with new configuration settings on different server pools.

The OCS provisioning system should be extensible enough to adapt to the enterprise's specific needs not just from an initial on-boarding perspective, but also as an ongoing update to enforce the rules and policies for all users.

## **Ensim Automates Account Settings**

Ensim Unify enables system administrators to automate several maintenance processes, which can be configured to ensure that every user's entitlements are enforced in the account settings. For example, if the Session Initiation Protocol Uniform Resource Identifier (SIP URI) for a user is configured to be same as their email address, the maintenance jobs will ensure that this rule is enforced at all times. Any inconsistencies or misconfigurations in the deployment will be detected and corrected by the system without requiring administrator intervention. Automated updates to employee status can even be performed during off hours if necessary.

## **Issue # 4: Multiple Levels of Help Desk Support**

In addition to establishing the process for user provisioning and configuration updates, OCS administrators have to plan the delegation for their support help desk. Any large deployment of OCS would require a multi-level help desk support hierarchy. Each level is designed to address certain types of requests. Out-of-scope requests usually based on their complexity should be escalated to higher levels for resolution by more senior administrators.

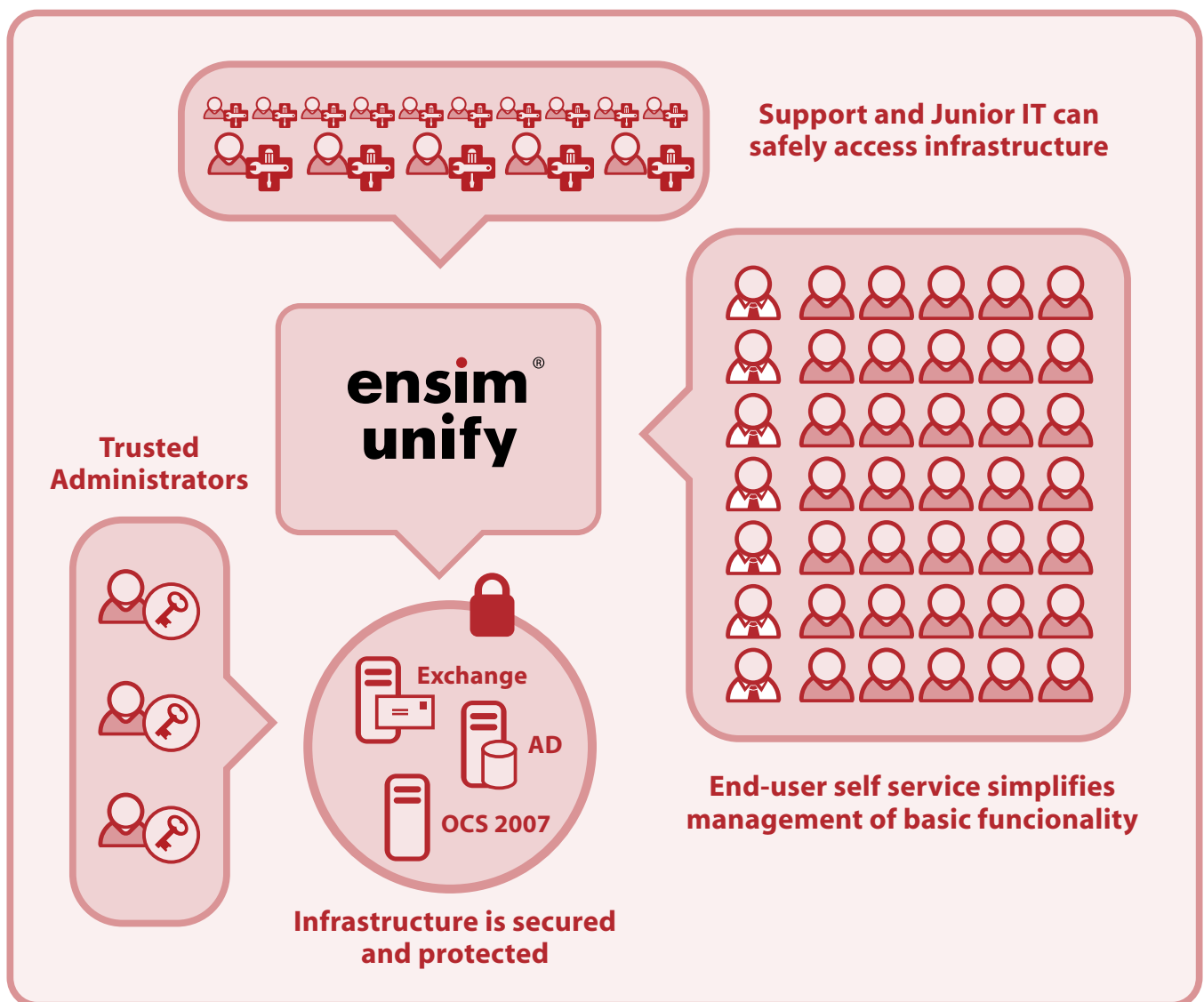
Most organizations can put this hierarchical authority in place; however, administrators have limited ability to enforce this delegated administration of management tasks through the native interfaces supplied in OCS. As a result, they are forced to give out elevated privileges for all levels of help desk staff, making the underlying application and systems vulnerable to misconfiguration or security breaches.

## **Ensim Delegates Tasks**

Ensim Unify's powerful role-based delegated administration enables IT organizations to use out-of-the-box roles or define custom roles, allowing complex tasks to be safely performed by even junior IT administrators.

Tasks, such as password reset, can also be delegated to end users where appropriate allowing help desk personnel to spend their time on more complex issues.

As the diagram below demonstrates, the Unify role engine ensures that everybody's access to the various administrative privileges within Unify is appropriately limited to those allowed for their specific role. From that point on, an easy-to-use web client can be employed to perform any authorized operation from anywhere.



## **Issue # 5: Audit & Compliance**

Security and compliance form an important part of any decision on IT infrastructure management software. The ideal OCS provisioning solution should make auditing and compliance requirements transparent, while tracking every change in the background in real time as they are made.

### **Ensim Simplifies Compliance and Security Audits**

Ensim Unify works with existing policy and entitlement management systems to provision and manage access to the full range of OCS features while adhering to IT compliance and security policies. Any changes made at any time in the provisioning or modification process are captured for audit reporting. At the same time, any changes to employee status are instantly updated and available. Organizations that use tools like Ensim Unify find audits consume less time consuming and less expensive because the overall infrastructure is more secure.

## **CONCLUSION**

Ensim Unify's OCS 2007 Manager is an essential companion for any Microsoft Office Communication Server deployment. It offers a complete, role-based provisioning capability that can be implemented just for OCS, or across the entire unified communications infrastructure.

Providing integration with existing identity management solutions, Unify enables organizations to quickly deploy, provision, and manage OCS accounts, while automating enforcement of IT security and compliance policy.

For more information, visit [www.ensim.com/products/unify/managed/index.html](http://www.ensim.com/products/unify/managed/index.html) or contact us directly at **1-877-MY ENSIM (1-408-496-3700 outside the US)**.

## About Ensim Corporation

Ensim Corporation is the leading provider of management software for Unified Communications and Collaboration infrastructure. Ensim products are used by service providers and enterprises worldwide to accelerate and enable deployment of integrated solutions, simplify and automate secure management of complex environments, and increase user and IT productivity. Ensim is a Microsoft Gold Certified partner and also maintains strategic partnerships with many leading Infrastructure vendors, including Research In Motion (BlackBerry), Hewlett Packard, Accenture, Siemens and BroadSoft.

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