

# HEAT Link to LDAP

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# FrontRange Solutions

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# Welcome

## Welcome to HEAT Link to LDAP

Welcome to HEAT Link to LDAP! LDAP is the abbreviation for Lightweight Directory Access Protocol. When HEAT is integrated with an LDAP directory service, you have a method for populating the HEAT Profile table with data from the directory service.

HEAT Link to LDAP is free with the purchase of HEAT Service & Support 7.0 and is available from the HEAT Service & Support 7.0 CD. It is not, however, part of the auto-install. You must go to the **HEATLinkToLDAP** folder at the root of the CD to obtain it. All of the information in this document can be found by accessing the LDAP online Help.

### Things You Can Do with HEAT Link to LDAP

- Populate the HEAT Profile Table with data from the LDAP directory service.
- Configure the transfer of information through the HEAT Link to LDAP Configuration Tool.
- Update customer/employee profiles on the fly.
- As an administrator, start or stop the service through the Service Control or the Service Application.

# Getting Started

## Installing HEAT Link to LDAP

1. Close any open application on your computer except Microsoft Windows.
2. Insert the 7.0 CD into your CD-ROM drive.
3. If Windows AutoRun is enabled, the Product Installation menu will display automatically. HEAT Link to LDAP cannot be installed from the default installation program. Please end this Windows Installer session (i.e., cancel out of the installer).
4. Click the **Start** button, select **Run**. Type **x:\Link\_LDAP\setup.exe**, where "x" is the letter of your CD-ROM drive. Press Enter or click **OK**. The Product Installation menu will display.
5. Follow the on-screen instructions to complete the installation.

## **Launching HEAT Link to LDAP**

There are three components of HEAT Link to LDAP. If you are an administrator, you need to launch the LDAP Configuration Tool and the Service Application Tool or the Service Control Tool depending on what operating system you are running. If you are an end user, you need to install the HEAT Link to LDAP Quick Update Tool.

### **To Launch the HEAT Link to LDAP Configuration Tool**

Once Heat Link to LDAP is installed, go to **Start>>Programs>>HEAT>>HEAT Link to LDAP Configuration Tool**.

### **To Launch the HEAT Link to LDAP Service Application/Service Control Tool**

Once Heat Link to LDAP is installed, go to **Start>>Programs>>HEAT>>HEAT Link to LDAP Service Control Application**.

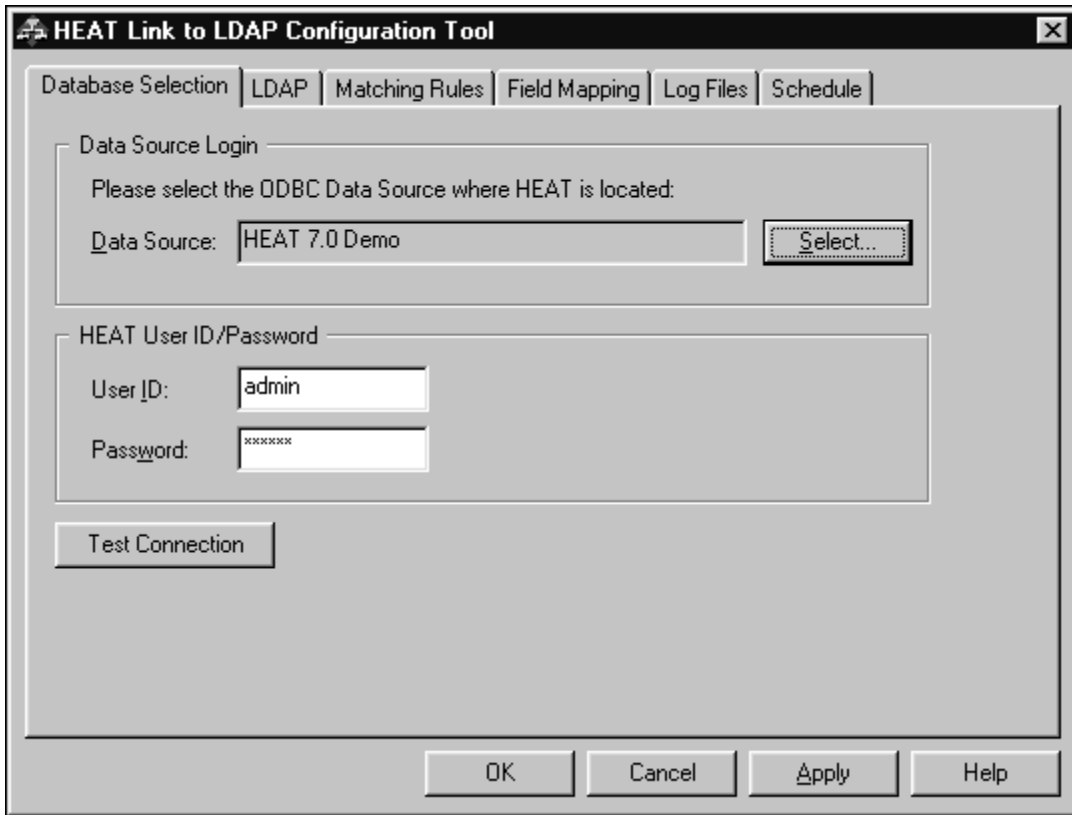
### **To Run the LDAP Quick Update Tool .exe**

See your System Administrator for the Quick Update Tool's Installer location. Map out to this location, run the .exe, and then set up the AutoTask needed to run the program in Call Logging.

## Navigating HEAT Link to LDAP

The HEAT Link to LDAP Configuration Tool is the primary interface for setting up the integration of HEAT with an LDAP server. There are six tabs:

- Database Selection
- LDAP
- Matching Rules
- Field Mapping
- Log Files
- Schedule



The screenshot shows the 'HEAT Link to LDAP Configuration Tool' dialog box. It has a title bar with a close button (X) and a tabbed interface with six tabs: 'Database Selection', 'LDAP', 'Matching Rules', 'Field Mapping', 'Log Files', and 'Schedule'. The 'Database Selection' tab is active. Inside the dialog, there are two main sections. The first section is titled 'Data Source Login' and contains the text 'Please select the ODBC Data Source where HEAT is located:'. Below this text is a text box labeled 'Data Source:' containing the text 'HEAT 7.0 Demo' and a 'Select...' button. The second section is titled 'HEAT User ID/Password' and contains two text boxes: 'User ID:' with the text 'admin' and 'Password:' with the text 'xxxxxx'. Below these text boxes is a 'Test Connection' button. At the bottom of the dialog are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.

# How HEAT Link to LDAP Works

## How HEAT Link to LDAP Works

LDAP is the abbreviation for Lightweight Directory Access Protocol, which is an Internet protocol e-mail programs use to look up contact information from the server where the directory service resides. The newest versions of Microsoft Windows and Novell Netware also use it to track network users. When HEAT is integrated with the LDAP directory service, you have a method for populating the HEAT Profile table with data from the directory service. To successfully implement this integration, it is necessary to build associations between fields in the HEAT Profile table and attributes in the LDAP data.

Synchronization is not dynamic, but is scheduled through the Configuration Tool. The Configuration Tool controls all aspects of the LDAP service.

The LDAP Service Control is an interface the system administrator can access through the Start menu to start or stop the service.

Users install the Quick Update Tool after installing either the LDAP Service or Application on their computer. Installing the service versus the application depends on the operating system the client computer is running. When the Quick Update Tool is installed, the user can then design an AutoTask to update individual Profile records on the fly.

**Note:** HEAT Link to LDAP is free with the purchase of HEAT Service & Support 7.0 and is available from the HEAT Service & Support 7.0 CD. It is not, however, part of the auto-install. You must go to the **HEATLinkToLDAP** folder at the root of the CD to obtain it. The system administrator should have an understanding of LDAP concepts and syntax before installing LDAP and working with the HEAT Link to LDAP Configuration Tool.

**CAUTION:** You cannot set up HEAT Link to LDAP through the Business Process Automation Module's (BPAM) Business Rule Editor. It is inappropriate to run the LDAP update as a Business Rule.

## About the HEAT Link to LDAP Service Control and Service Application

If you're running a Windows NT, 2000, or XP operating system, you run HEAT Link to LDAP as a **service control**. These operating systems include service capability; thus, the LDAP service control is not running the service—the operating system is. The service control allows you to start and stop the service, update the HEAT profiles, or access the LDAP Configuration Tool. You may launch the service control through **Start>>Programs>>HEAT>>HEAT Link to LDAP Service Control Application**. You can start or stop the service through the Services icon on the Control Panel, but you are not accessing the actual service control if you do so.

**Note:** Minimal configuration through the HEAT Link to LDAP Configuration Tool is required for either the Service Control or the Service Application to run. You must complete the following information:

- \* the HEAT User ID field in the Database tab.
- \* the fields in the LDAP tab.
- \* the HEAT CustType field in the Matching Rules tab.

If you are running LDAP as an application and make changes in the Configuration Tool, even if you save those changes you must shut down the service application and restart it so it “sees” your changes.

If you are running a Windows ME, 98, or 95 operating system, or if the HEAT Link to LDAP service is not installed on your Windows NT, 2000, or XP computer HEAT Link to LDAP runs as a **service application**. The service control interface is virtually identical if you are running LDAP as an application—the only notable difference is in the title bar.

**Note:** If you close the service application, you receive a warning message notifying you LDAP will no longer be able to process updates if you close the application.

## About the HEAT Link to LDAP Quick Update Tool

The Quick Update Tool setup.exe becomes available after either the LDAP service or application is installed. Client computers can then map out to the location where the setup.exe is housed and double-click it to install the Quick Update Tool on their own computer. Two files appear in the C:\Program Files\HEAT directory (this is the location default) when the Tool is installed on the client computer: the client setup.exe, and a .dll.

After the Quick Update Tool is installed on the client computer, the user must set up an AutoTask through Call Logging to run it. When the AutoTask is established, the user can update individual Profile Records on command. For example, if an employee calls a technician with an issue after moving from one department to another, the technician can call up that employee by their CustID. The associated Subset information may, however, be incorrect if the HEAT Profile table was not yet updated with the changes made to the LDAP repository.

**Note:** The HEAT Profile table is updated regularly at an interval the system administrator designates in the HEAT Link to LDAP Configuration Tool's Schedule Tab.

By running the Quick Update Tool, the new LDAP information for that particular Profile Record is written to the Profile table, and when the Call Logging user re-validates the Subset, the record is saved with the correct Profile information.

**Note:** After running the Quick Update Tool, the Call Record's Subset **is not dynamically updated**—that is, the Subset does not reflect the updated information. The user is notified of the Quick Update Tool's success or failure with a dialog box. If the update was a success, the dialog box indicates this; if it failed, the dialog box indicates this with a short description of why it failed.

# Using the HEAT Link to LDAP Configuration Tool

## About the HEAT Link to LDAP Configuration Tool

To access the LDAP Configuration Tool, go to **Start>>Programs>>HEAT>>HEAT Link to LDAP**. The **HEAT Link to LDAP Configuration Tool** dialog box appears with six tabs available:

- Database Selection tab
- LDAP tab
- Matching Rules tab
- Field Mapping tab
- Log Files tab
- Schedule tab

**Note:** The Configuration Tool must run on the computer where the LDAP service is housed, and the settings specified in the Configuration Tool are stored in the registry.

**CAUTION:** You cannot set up HEAT Link to LDAP through the Business Process Automation Module's (BPAM) Business Rule Editor. It is inappropriate to run the LDAP update as a Business Rule.

## The Database Selection Tab and Configuring HEAT

The first step in integrating HEAT with the LDAP Service is to specify the HEAT data source, data source user ID and password, as well as the HEAT user ID and password.

### To Configure HEAT

1. In the **HEAT Link to LDAP Configuration Tool** dialog box, click the **Database Selection** tab.
2. In the **Data Source Login** area, click **Select** to choose a database.
3. In the **HEAT User ID/Password** area, type your user ID and password.
4. Click **Test Connection** to determine if you can successfully connect to the database. If your settings are correct, you receive a message box confirming that; if your settings produce an error, you receive a message box stating an error has occurred.

## The LDAP Tab and Configuring LDAP

The next step in integrating HEAT and LDAP is configuring the LDAP side of the equation. You must specify the information required to connect to the LDAP server and retrieve the requested user information.

### To Configure LDAP

1. In the **HEAT Link to LDAP Configuration Tool** dialog box, click the **LDAP** tab.
2. In the **Connection** area, specify the host—that is, the LDAP server that is the source of the customer information you want to import into the Profile table—by typing it in the **Host:** text box.
3. Type the port the LDAP server should listen to in the **Port:** text box:
  - Use Port 389 for regular, non-secured connections.
  - Use Port 636 or 639 for Secure Sockets Layer (SSL) connections.
  - Any other manually configured port number (rarely used).
4. Click the **Add** button adjacent to the **Base DN:** text box. The **Add a new Base DN** dialog box appears.
5. In the **Enter the Base DN** text box, type a Base DN.
6. Click **OK**. The Base DN you typed appears in the **Base DN** text box. You can add multiple Base DN's to define the scope of your search. Repeat steps four through five to do so.

#### Notes:

- A **distinguished name (DN)** is a text string identifying a specific directory branch or entry point. Each user or group in the organization is represented in the Directory Server by a DN (string representation of the user or group's name and location in the LDAP directory).

For example, a **User DN** (which you would have to provide if you did not chose **Anonymous Bind**) might look like this: **cn=jdoe,ou=cs,dc=frontrange,dc=com**.

The **Base DN** is the DN used to designate the *scope* of an LDAP search. An example of a Base DN might be: **ou=cs,dc=frontrange,dc=com**, which means the LDAP search begins looking at the FrontRange Solutions Colorado Springs level, versus the more general level of FrontRange Solutions as a whole.

- If you add more than one Base DN, ensure the second Base DN is not nested in the first Base DN. Processing the same data repeatedly is not recommended.

For example, if you add the following two Base DN's:

**ou=admins,ou=Users**

**ou=Users**

HLL does not detect the ou=Users repetition and processes the command as-is.

7. In the **Credentials** area, you can determine who can look at the schema in the LDAP repository. If anyone can view the schema, select **Anonymous Bind**. Doing so makes the User DN and Password text boxes unavailable.
8. If user authorization is required, type a User DN and password in the appropriate text boxes.

9. In the **Object Classes** area, add or remove the Object Classes you want to use in your mapping criteria. You can use the default Object Classes provided, or you can provide your own list.
10. Click the **Add** button adjacent to the **Object Classes** text box to configure additional object classes used in the specific LDAP database. The **Add ObjectClass** dialog box appears.
11. In the **Enter the object Class type** text box, type an Object Class. Repeat steps ten through eleven for each additional Object Class you want to add.

**Note:** This list should be maintained by your LDAP administrator. If you are unsure of the Object Classes in the list, contact your LDAP administrator.

12. Click **Test Connection** to see if you can successfully connect to the LDAP server.
  - If your settings are correct, you receive a confirmation message box.
  - If your settings produce an error, you receive a message box stating **LDAP Search Error: No Such Object**. A second message box then appears displaying the bad Base DN.

**Note:** Should you provide multiple Base DN's, and one of them is good and one of them is bad, the connection runs successfully based on the one good Base DN. You do, however, receive the **No Such Object** error message in relation to the bad Base DN provided.

## The Matching Rules Tab and Selecting the LDAP Customer ID

In the Matching Rules Tab, you gather the information to:

- Relate HEAT profiles to LDAP data through matching the CustID field from the Profile table to a unique attribute in the LDAP directory.

**Note:** The HEAT CustID field length is 25 characters; thus, for the HEAT profile table's CustID field to correctly match to an LDAP attribute, that LDAP attribute must be unique up to the first 25 characters. (The LDAP attribute can, however, be longer than 25 characters.) For example, a good LDAP attribute to match to the Customer ID would be "mail" (e-mail) or "uid" (user ID), as these attributes are always unique. Surname, or "sn" would be a poor choice as several users might have identical surnames.

- Determine if non-LDAP originating changes should be flagged if such information is encountered during synchronization. For example, updates to the Profile table can come from sources outside of LDAP: users could manually enter changes and additions, or another database could be polled and changes or additions from that source might be included at synchronization time.

### To Select the LDAP Customer ID

1. Click the **Matching Rules** tab.
2. In the **LDAP Customer ID** area, select the LDAP attribute from the drop-down list to use as the Customer ID. This must be a unique attribute. In the example, we have chosen **uid**—user ID.
3. In the **HEAT Customer Type** area, select the HEAT Customer Type from the drop-down box assigned to the profiles created from LDAP data. In the example, we have chosen **Employee**.
4. In the **Action Rules** area, determine if you want to flag non-LDAP originating changes made to the HEAT Profile table. If you wish to flag the changes brought in from outside of LDAP, select the **Flag all non-LDAP customer information with the following:** check box.
5. Click the arrow in the **Field** drop-down list to select which field to flag. We used **Notes** in our example.
6. In the **Value** text box, type a value to serve as an indicator. We chose to use **non-LDAP** as the indicator value.

## The Field Mapping Tab and Matching HEAT Fields with LDAP Attributes

The Field Mapping tab allows you to designate which HEAT fields correspond to what LDAP attributes; however, this mapping process does not require you to choose an LDAP value. For example, if you wish to have all LDAP data assigned a service level of “gold,” you can accomplish this by typing **SLAClass** into the **HEAT Field** text box, not selecting anything in the **LDAP Attribute** text box, and typing **Gold** into the **Default Value** text box.

Alternately, if a particular field is required by HEAT (those fields marked with an exclamation point), and the corresponding LDAP attribute does not have a value for every instance of that attribute, you must supply a default value so the HEAT database can correctly populate the record.

**Note:** In LDAP, an “attribute” is a shorthand designator for a certain data value. For example, “sn” might indicate a surname; thus, sn = Smith means “surname equals Smith.”

### To Match HEAT Fields with LDAP Attributes

1. Click the **Field Mapping** tab.
2. Click the **Add** button. The **Edit Field Mapping** dialog box appears.
3. In the **HEAT Field** drop-down box, select a field from the HEAT side. You may also type it into the text box if you are sure of the way it appears in the Profile table.
4. In the **LDAP Attribute** drop-down box, select an attribute from the LDAP side. You may also type it into the text box if you are sure of the way it appears.
5. In the **Default Value** field, type a value for any required HEAT fields. It is recommended these fields have a value; if the LDAP attribute is not populated, and you have not designated a value for a required field the HEAT database does not populate the field in the database.

**Note:** If a field is required, it is marked with an exclamation point icon in the left margin of the window.

6. Repeat steps three through six until you have made all of the desired associations. Click **OK**.

## The Log Files Tab and Saving Log Files

Use the Log Files tab to specify where to save the log files. The options under this tab allow you to tailor the type and amount of logged information.

**Note:** The service must be running in order to delete log files. If you schedule the update to run weekly, but choose to remove log files more than two days old, log files are not removed every two days. They are removed *based on the update schedule*. For example, if you schedule the update to run every Thursday, when it runs, everything older than and including Monday's log files are removed. Log files begin accumulating again from that Thursday forward until the next update; thus, you have more than two days worth of log files stored even though you chose to have log files more than two days old removed from the log file.

### To Save Log Files

1. Click the **Log Files** tab.
2. In the **Log Files** area, click the **Browse** button. Determine where you want to store the log files.
3. Select **Remove Log Entries After X Days** and type a number where X is the number of days log entries are kept.
4. In the **Items to Log** area, select which items you wish to log. Two choices are available:
  - Added Profile Records
  - Updated Profile Records
5. Click **Apply**, and then click **OK**.

## The Schedule Tab and Scheduling the Query

The Schedule tab is where you specify the polling frequency for updating the HEAT database. This is a necessary step because synchronization is not dynamic.

### To Schedule the Query

1. Click the **Schedule** tab.
2. In the **Scheduling Query** area, determine if you want to run the query:
  - **Hourly:** Type a value in the **Every X hours** text box where X is the number of hours elapsed between updates.
  - **Daily:** Type a value in the **Every X days** text box where X is the number of days elapsed between updates. Select a time in the drop-down list for the update to take place.
  - **Weekly:** Type a value in the **Recur every X week(s) on:** text box where X is the number of weeks elapsed between updates. Select a day of the week on which you want the update to occur, as well as a time in the drop-down list for the update to take place.
3. Click the **Calculate Next Run** button to see when the next query is scheduled to run.

### Notes:

- The first time you set up the scheduling query and click the **Calculate Next Run** button, a HLL dialog box appears stating **Next run will occur immediately**.

Upon starting the service, a run occurs immediately to establish a value in the registry against which future scheduled queries can run. The registry stores the value representing the most recent poll, and the database stores the value representing a poll's scheduled run time. When the base value is established in the registry, all future polls determine their run based on the *difference* between that registry value and the scheduled run time.

- Also note if you schedule a query for every X days and the time of day you choose for the query to run is later than the current time, the scheduled query runs **at** the scheduled time **on** the current day. For example, if it were 3:00 PM on Friday, and the query was slated to run at 6:00 PM every three days, it would run that Friday evening at 6:00 PM and then again on Monday evening at 6:00 PM. The Calculate Next Run dialog box would reflect the current day's date and the 6:00 PM polling time.

4. Click **OK**.

# Using the Quick Update Tool

## The Quick Update Tool AutoTask

To run the Quick Update Tool on a client computer, the user must create an AutoTask through Call Logging. The LDAP Service or Application must first be installed so you have access to the LDAP Quick Update Tool .exe. Install the Quick Update Tool before building the AutoTask.

### To Create the Quick Update Tool AutoTask

1. Launch Call Logging by going to **Start>>Programs>>HEAT>>Call Logging**.

**Note:** For an in-depth explanation of AutoTasks, please see the Call Logging online help module.

2. From the main Call Logging menu bar select **AutoTask>>Run/Edit a Task**. The **Run a Task** dialog box appears.
3. Click **Add**. The **Add/Edit Task** dialog box appears.
4. In the **Actions** area, click **Add**. The **Specify Action Type** dialog box appears.
5. Select **Run a Program**. The **AutoTask Run Program Action** dialog box appears.
6. In the **Filename** text box, browse to the **HEATLDAPQU.exe**. This is the program that executes when you want to update the current Call Record with the latest Profile information.
7. Place the cursor in the **Arguments** text box. The **Insert** button becomes available. Click it.
8. Choose **Insert Field** from the shortcut menu. The **Insert Field** dialog box appears.
9. In the **Table** drop-down box, select **@Functions**.
10. In the **Field** text box, select **@Credentials**.
11. Click **OK**. The first part of the argument appears in the **Arguments** text box.

**Note:** You must include a space after the first argument. If you do not, the two arguments are treated as one and the AutoTask fails.

12. Click **Insert**. Choose **Insert Field** from the shortcut menu. The **Insert Field** dialog box appears.
13. In the **Table** drop-down box, select **Profile**. In the **Field** text box, select **CustID**. Click **OK**. The second part of the argument appears in the **Arguments** text box.
14. Click **OK**. Your new Run a Program AutoTask appears in the **Add/ Edit Task** dialog box's **Action** area.
15. In the **Name** text box, type a descriptive name for the AutoTask. Click **OK**.
16. The AutoTask now appears in the **Run a Task** dialog box pane. Click **Run** to run the new LDAP AutoTask.

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