ACTIVE DIRECTORY
PRE-INSTALLATION CHECKLIST

PRE-INSTALL STEPS

Thank you for purchasing the Active Directory Integration Module for Maintenance Connection. To expedite your install, and make the process easier, we have put together a list of items that need to be accomplished before an install can take place. Should you have any questions about this list, please contact your Account Manager and we will gladly assist you.

1) Please ensure that the Web Server has been properly configured and is able to access Active Directory.

The Web Server must be fully domain joined and have a consistent connection to Active Directory. Anonymous access to Maintenance Connection will be disabled once installation is complete.

2) Please ensure you have fully reviewed the checklist and filled out responses where appropriate.

If you have any questions regarding the checklist please contact your Account Manager and we will gladly assist you.

With these steps completed and the information gathered in the checklist, your installation will take less time and there will be fewer chances of issues arising. Once again, thank you for your purchase the Active Directory Integration Module for Maintenance Connection, and if you have any questions, please contact your Account Manager and we will clear up any issues.

Thank you,
Technical Services

CHECKLIST

PRE-INSTALL QUESTIONS	ANSWERS
Is the Maintenance Connection Active Directory Install File downloaded to the Web Server?	
LDAP Path? (Can be in the form of LDAP:// or GC://)	
Does Active Directory require authentication to access the users list?	
If above is Yes, a user ID & password (password can be provided during setup)	
The SQL Server Path	
The connection key for the MC Database (ex. SERVICE)	
The SQL Server user ID & password	

LDAP CONFIGURATION SETTINGS	ANSWERS
When a user is imported from Active Directory the Labor (or Requester) record is populated with information contained within Active Directory. These are the Active Directory fields containing the information that should be used to populate the generated Labor/Requester record. When an Active Directory field is usually known that field name is contained within the square brackets.	
Username [sAMAccountName]	
First name [givenName]	
Last name [sn]	
E-mail Address [mail]	
Work Phone (optional)? A 30 character field. Not automatically formatted.	

DEFAULT VALUES	ANSWERS
When Active Directory contains a user that does not have information that is required by Maintenance Connection these default values are used. The defaults can be decided during installation if unsure.	
Default e-mail address for users?	
Default Repair Center?	
Default Craft?	

ROLE MAPPINGS	ANSWERS
There are an unlimited number of Access Groups allowed to exist within Maintenance Connection. Role mapping allows for mapping an Active Directory role to its security preferences (Access Group) within Maintenance Connection.	
What AD role(s) contains all users that should have Requester access to Maintenance Connection?	
What other AD role(s) contain users that should be mapped to Maintenance Connection (Admin or Techs)?	

CONFIGURATION	ANSWERS
When users are added into Maintenance Connection they are required to be approved before the accounts can be used. These control how/if the system will automatically approve the users or if an Administrator must manually approve them.	
Should users be automatically approved?	
If No, which Access Groups should be automatically approved? Recommended: Requesters.	