LDAP/NOVELL
PRE-INSTALLATION CHECKLIST

PRE-INSTALL STEPS

Thank you for purchasing the LDAP Integration Service 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 of the LDAP Integration Service 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 LDAP Integration Service Install File downloaded to the Web Server?	
LDAP Path? LDAP Port? [default 389]	
The user DN to be used to access the LDAP server?	
Password for the user to access the LDAP server? (password can be provided during setup)	

LDAP CONFIGURATION SETTINGS	ANSWERS
When a user is imported from LDAP the Labor (or Requester) record is populated with information contained within the LDAP directory. These are the LDAP fields containing the information that should be used to populate the generated Labor/Requester record.	
Username [cn]	
First name [givenName]	
Last name [sn]	
E-mail Address [mail]	
Work Phone (optional)? A 30 character field. Not automatically formatted.	
Home Phone (optional)? A 30 character field. Not automatically formatted.	
Mobile Phone (optional)? A 30 character field. Not automatically formatted.	
Fax (optional)? A 30 character field. Not automatically formatted.	
User Enabled? A field that will mark users as being disabled. If the field exists it must contain TRUE for enabled users.	

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?	

ROLE MAPPINGS	ANSWERS
There are an unlimited number of Access Groups allowed to exist within Maintenance Connection. Role mapping allows for mapping a LDAP role to its security preferences (Access Group) within Maintenance Connection.	
What LDAP role(s) contains all users that should only have Requester access to Maintenance Connection? Recommended: Domain Users	
What other LDAP role(s) contain users that should be mapped to Maintenance Connection (Admin or Techs)?	
Approximately how many users are currently in each LDAP role?	
Should future Access Group management be performed by Maintenance Connection or LDAP? *Note: Initial import always uses LDAP *	

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 all users be automatically approved?	
If No, which Access Groups should be automatically approved? Recommended: Requesters.	

SYNC SCHEDULE	ANSWERS
The synchronization schedule. LDAP is scanned for users based on this schedule	
Preferred synchronization schedule? Default: Every 60 minutes	