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## **Sample LDAP Setup Guide**

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The following is an excerpt from a LDAP User Guide created previously for administrator's usage.



# LDAP Set Up Guide Part 1

## Introduction

LDAP (Lightweight Directory Access Protocol) including Active Directory can be used for authenticating users on the network. LDAP is considered a standard for user authentication and for storing user profile data. Very large organizations use LDAP as it is a powerful tool to simplify user account management.

The application does not by default use LDAP but rather it stores all user data in a database and performs authentication with that data. During setup you will specify which users and groups from LDAP you want the application to use. The software will query your LDAP server to ensure that users and groups (if you want) are nominally represented in the application database (so that users can be associated with content), but will authenticate against your LDAP server.

This article will guide you through configuring the application to use your LDAP server for authentication.

Note: If you're using Active Directory, make sure it allows LDAP querying. You might also be interested in LDAP Querying Basics at the Microsoft website, or LDAP Attributes at the Computer Performance web site.

## Starting the Setup Tool

The setup tool will run the first time you access the application if you've just installed it. If you've already completed the setup process and need to use the tool again to configure LDAP, do the following:

1. Stop the application service from the command prompt: `/etc/init.d/application stop`
2. Edit `/usr/local/jive/applications/sbs/home/startup.xml` so that the `<setup>` element has the value "false" (meaning "setup has not been run").
3. Start the application service from the command prompt: `/etc/init.d/application start`
4. Point your browser at software SBS using the URL above and rerun the setup tool.

## Configuring the Application for LDAP

You will give information for connecting to the server on the next three screens in the setup tool which includes querying for users and how groups should be handled. Begin by choosing a server type such as Active Directory or OpenLDAP.

1. In the setup tool on the **User Settings** step, choose **Directory Server (LDAP)** as the authentication and user mode then click **Continue**.

## User Settings

Choose a user, group and authentication system below. Most installations should use the default implementation. The other options can be used when you need to integrate Jive SBS with an existing user database or authentication system.

- Default**  
Store users and groups in the database. This is the best option for simple deployments.
- Directory Server (LDAP)**  
Integrate with a directory server such as Active Directory or OpenLDAP using the LDAP protocol. Users are stored in the directory and treated as read-only. Groups can either be stored in SBS or in the directory.

Continue

2. On the **Connection Settings** page enter the connection values required by your LDAP server. Your server type choice will determine the default values displayed later in the setup tool.
3. Click **Advanced Settings** to make other connection-related settings.
4. Click **Test Settings** to confirm the connection settings for host, port, and base DN.

## LDAP User System: Connection Settings

1. Connection Settings    2. User Mapping    3. Group Mapping

### Step 1 of 3: Connection Settings

Configure connection settings for your LDAP directory below. All fields are required; if you need additional information about a field, hover your mouse over the corresponding help icon.

#### LDAP Server:

Server Type:  ?

Host:  ?    Port:  ?

Base DN:  ?

#### Authentication:

Administrator DN:  ?

Password:  ?

[Advanced Settings](#)

Test Settings

Continue

5. Click **Continue** once you've gotten a successful test result.

6. Enter the names of fields your LDAP server uses for user data on the **User Mapping** page

## LDAP User System: User Mapping

1. Connection Settings    2. User Mapping    3. Group Mapping

### Step 2 of 3: User Mapping

Specify how to map LDAP fields to user profile information. Additional mappings can be added after the setup process in the admin console. If you need additional information about a field, hover your mouse over the corresponding help icon.

User Mapping	LDAP Managed
Username Field: <input type="text"/>	<input checked="" type="checkbox"/> Yes
Name Field: <input type="text"/>	<input checked="" type="checkbox"/> Yes
First Name Field: <input type="text"/>	<input type="checkbox"/>
Last Name Field: <input type="text"/>	<input type="checkbox"/>
Email Field: <input type="text"/>	<input checked="" type="checkbox"/> Yes
Title Field: <input type="text"/>	<input type="checkbox"/>
Department Field: <input type="text"/>	<input type="checkbox"/>
Work Phone Number Field: <input type="text"/>	<input type="checkbox"/>
Mobile Phone Number Field: <input type="text"/>	<input type="checkbox"/>
Fax Number Field: <input type="text"/>	<input type="checkbox"/>
Pager Number Field: <input type="text"/>	<input type="checkbox"/>
Home Phone Number Field: <input type="text"/>	<input type="checkbox"/>
Synchronize Profile on Login: <input type="checkbox"/>	
<b>User Relationship Mapping</b>	
Manager Field: <input type="text" value="manager"/>	<input type="checkbox"/>

[Advanced Settings](#)

7. After you've entered the values you need, click **Test Settings** to confirm that the values you entered are valid for your LDAP server. If any of the fields were not represented in the test results, you'll see those fields highlighted in red. For those highlighted values that you know should be mapped anyway, click the **LDAP Managed** check box.

1. Connection Settings    2. User Mapping    3. Group Mapping

### Step 2 of 3: User Mapping

Specify how to map LDAP fields to user profile information. Additional mappings can be added after the setup process in the admin console. If you need additional information about a field, hover your mouse over the corresponding help icon.

User Mapping	LDAP Managed ?
Username Field: <input type="text"/>	Yes
Name Field: <input type="text"/>	Yes
First Name Field: <input type="text"/>	<input checked="" type="checkbox"/>
Last Name Field: <input type="text"/>	<input checked="" type="checkbox"/>
Email Field: <input type="text"/>	Yes
Title Field: <input type="text"/>	<input checked="" type="checkbox"/>
Department Field: <input type="text"/>	<input checked="" type="checkbox"/>
Work Phone Number Field: <input type="text"/>	<input checked="" type="checkbox"/>
Mobile Phone Number Field: <input type="text"/>	<input type="checkbox"/>
Fax Number Field: <input type="text"/>	<input type="checkbox"/>
Pager Number Field: <input type="text"/>	<input type="checkbox"/>
Home Phone Number Field: <input type="text"/>	<input type="checkbox"/>

Synchronize User's Profile on Login:  ?

#### User Relationship Mapping

Manager Field:  ?

[Advanced Settings](#)

8. Click **Continue** once you've gotten a successful test result.
9. On the **Group Mapping** page select whether to use groups defined in LDAP or to define your own groups using the application.
  - a) Select **Use LDAP to manage groups** if you have groups in LDAP that you want Jive SBS to be aware of. With this option selected, the application will retrieve your LDAP server's group information just as it did for your LDAP users.
  - b) Select **Use Jive SBS to manage groups** if you want the application to ignore groups you have defined in LDAP. This option is useful if you want to use the application to define groups that are used only by it.

Note: Your LDAP server won't be aware of groups you define in the application. You can use the admin console to define groups; in the admin console, go to People > Management. If you select **Use LDAP to manage groups**, the setup tool provides default values based on the server type you chose in the **Connection Settings** step. In particular, you'll see the following defaults for Active Directory and OpenLDAP:

10. You can use the Member Field as a way to increase performance.
11. The software will use these values to query your LDAP server to retrieve information about the groups to use. The default values will include *all* groups found with the connection settings you gave. You may limit this to only certain groups by using an LDAP filter expression.
12. After you've entered the values you need click **Test Settings** if you're choosing to use LDAP groups which will confirm that the values you entered are valid for your LDAP server.
13. When you get a successful test, click **Continue**.
14. Click **Continue** if you're choosing to define groups in the application.
15. Complete the **Other Settings** page and click **Continue**.
16. On the **LDAP User Data Storage Mode** page, enter the name of the user (retrieved from your LDAP server) who should be the system administrator.
17. Click **Continue** to finish setting up.