



HEAT Connector Client Utility

User Guide

Release 1

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1. Overview

The objective of the HEAT Connector Client utility is to synchronize and import Active Directory users into HEAT Service Management.

This utility provides the following features:

- Enables the HEAT Service Management administrator to configure the Active Directory mapping.
- Generates a CSV file of the configured Active Directory users.
- Schedules the synchronization of the generated users into HEAT Service Management.

2. System Requirements

The following are the system requirements for the HEAT Connector Client utility:

- Operating System: Microsoft Windows 2008 Server R2 or Microsoft Windows 2012 Server R2
- RAM: 4 GB
- Hard Disk Space: 500 MB
- Microsoft .NET Framework: 4.5.2
 - NOTE: If this is not already installed, the app installs it during setup.
- You must have administrator permissions to schedule the daily LDAP configuration.
- Recommended but not required: Microsoft Windows 7 or higher (32-bit and 64-bit)

3. Installing and Uninstalling the HEAT Connector Client Utility

Installing the HEAT Connector Client Utility

1. Run the installer setup file called HEAT Connector Client Setup.exe. The system displays the screen shown in Fig. 1.



Fig. 1

2. Click **Install**. The installer installs the utility, starting with the prerequisites as shown in Fig. 2.

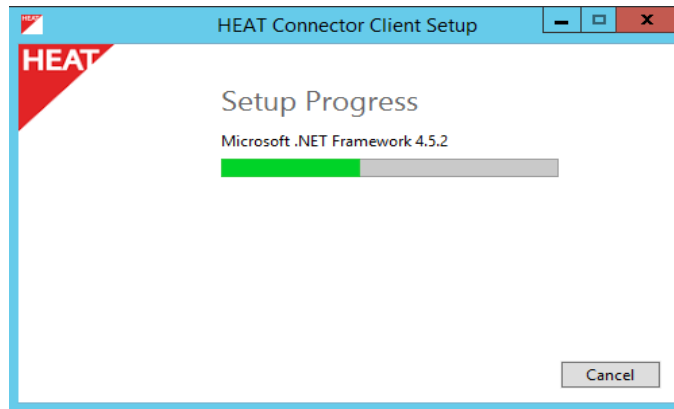


Fig. 2

After the prerequisites are installed, the installer displays the HEAT Connector Client utility as shown in Fig. 3.

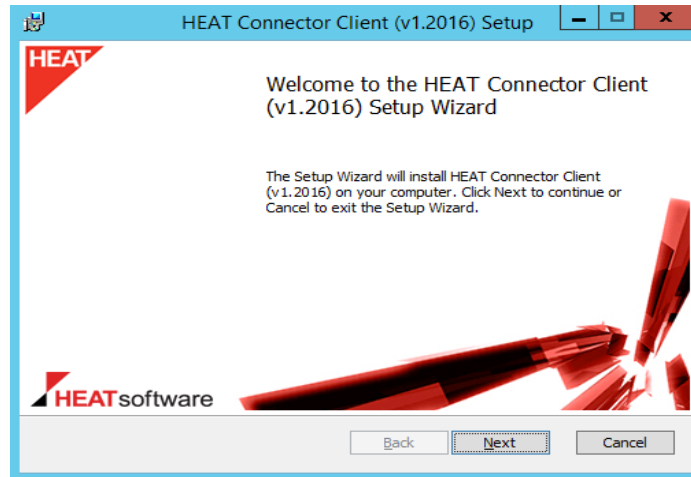


Fig. 3

3. Click **Next**. The installer displays the HEAT end user license agreement as shown in Fig. 4.



Fig. 4

4. Check **I accept the terms in the license agreement**. The system enables the Install button.
5. Click **Install**. The system installs the utility and displays the screen shown in Fig. 5.

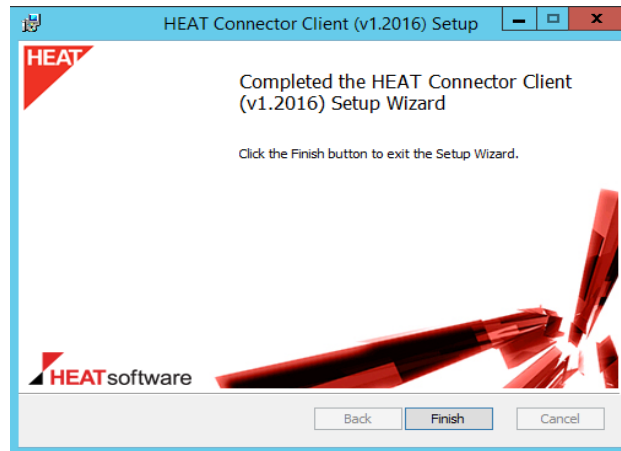


Fig. 5

6. Click **Finish**. If the installation was successful, the system displays the message shown in Fig. 6.

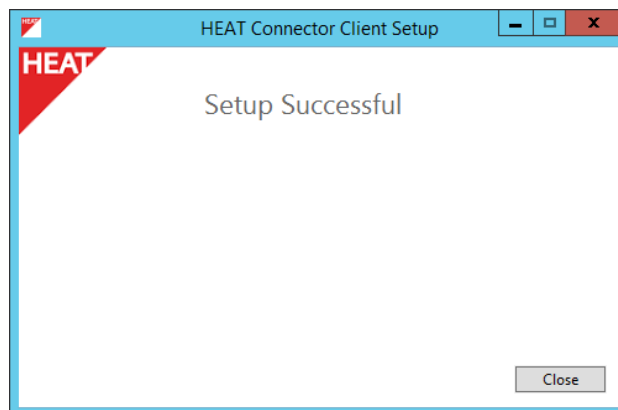


Fig. 6

7. Click **Close**. The system closes the setup wizard and displays a shortcut to the utility on the desktop.
8. From your desktop, go to the Control Panel and select **Administrator Tools -> Services**.
9. Check for the HEAT Directory Monitor Service. It should be displayed with the status of started and the startup type as automatic as shown in Fig. 7.

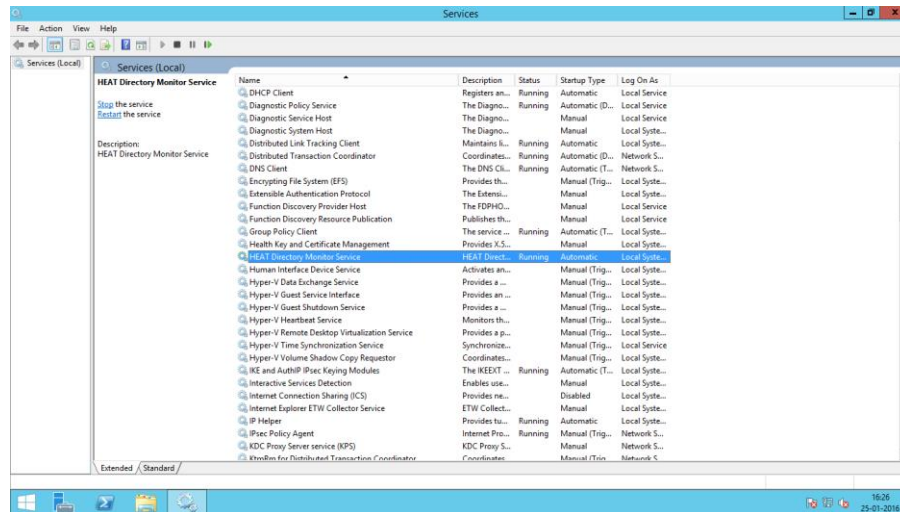


Fig. 7

Important

If the HEAT directory monitor service is not displayed in the list or the status is not as specified, contact your system administrator.

Uninstalling the HEAT Connector Client Utility

1. From your desktop, navigate to Programs and Features.
2. Select the HEAT Connector Client utility as shown in Fig. 8.

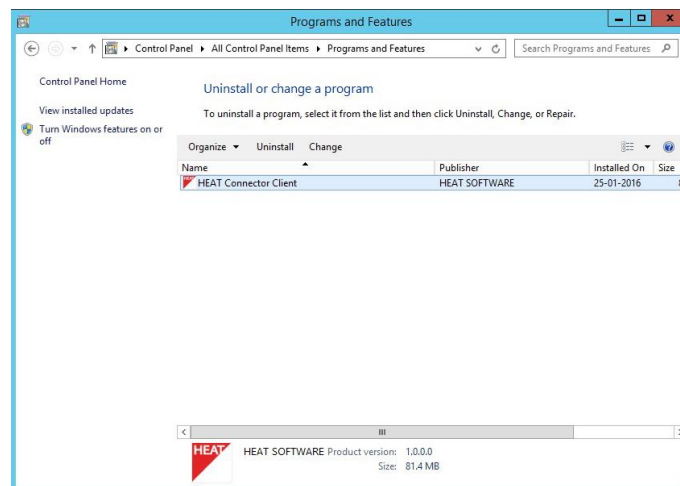


Fig. 8

3. Click **Uninstall**. The system prompts you to repair, uninstall, or close the utility, as shown in Fig. 9.

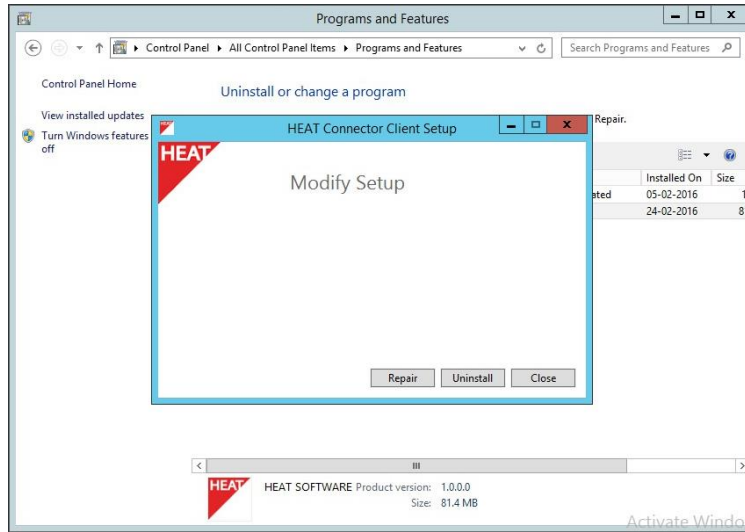


Fig. 9

4. Click **Uninstall**. The system uninstalls the utility and removes it from the Programs and Features list as shown in Fig. 10. The system also removes the HEAT directory monitor service from the list.

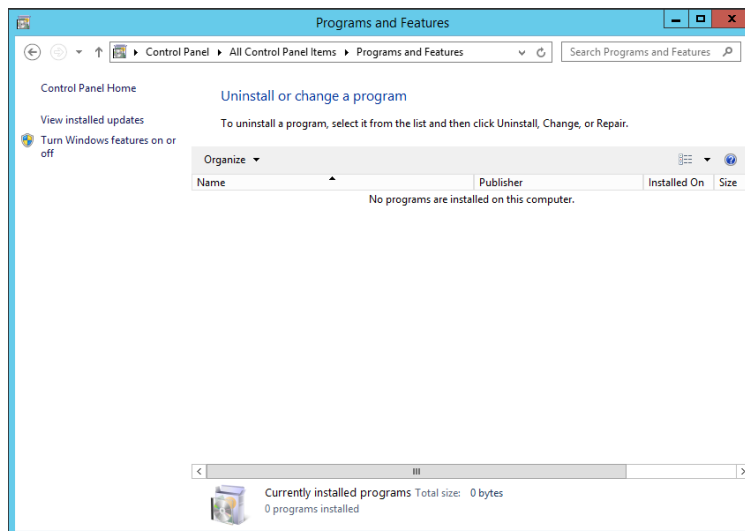


Fig. 10

4. Logging In to the HEAT Connector Client Utility

1. Click on the desktop shortcut. The system displays the login screen as shown in Fig. 11.

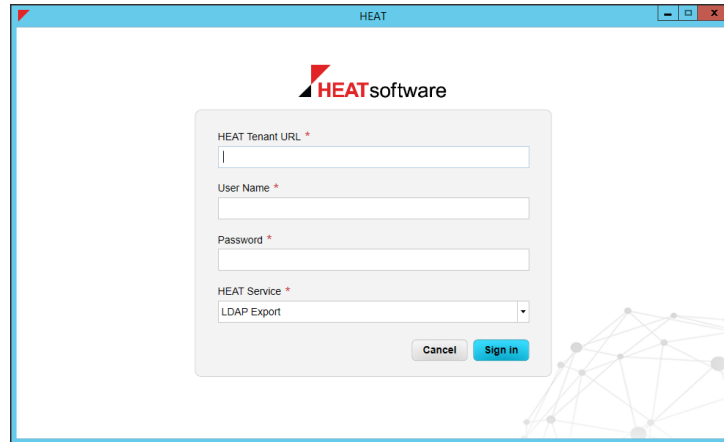


Fig. 11

2. Enter the URL of the HEAT Service Management tenant.
3. Enter your user name and password.
5. Select the HEAT service from the drop-down list. By default, the system displays LDAP Export, but you can also select Directory Monitor. See Fig. 12.

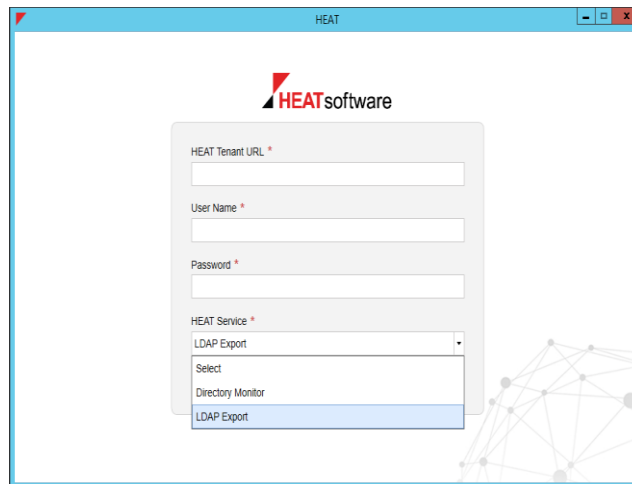


Fig. 12

4. Click **Sign in**. The system authenticates the user and displays the screen associated with the service that you selected.

5. Managing LDAP Export Profiles

This screen allows you to manage the following LDAP export profiles actions as shown in Fig. 13:

- View the list of LDAP export profiles.
- Create an LDAP export profile.
- Edit an LDAP export profile.
- Delete an LDAP export profile.

- Schedule, update, and delete the schedule for a profile.
1. Click **Add New Profile** to navigate to the Add LDAP export profile screen.
 2. Click **Go to Directory Monitor** to navigate to the Directory Monitor screen.
 3. Click **Exit** to exit the application. The system prompts you for confirmation.
 5. Click **Yes** to close the utility.

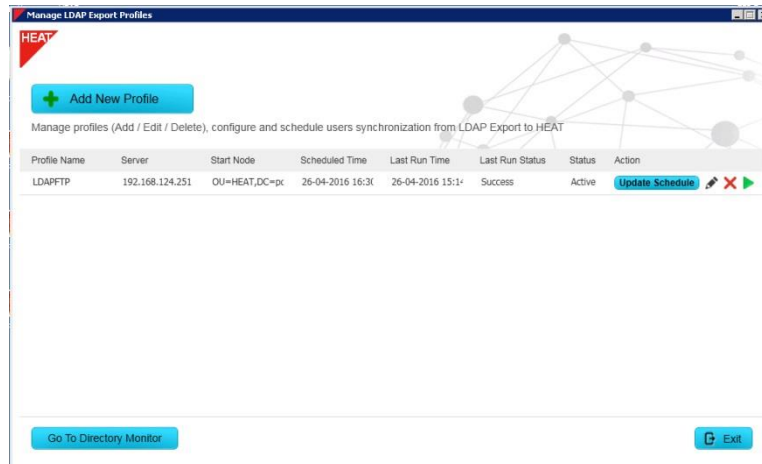


Fig. 13

This is the default screen once you log into the HEAT Connector Client utility. You can also navigate to here from the Directory Monitor screen.

Viewing the List of LDAP Export Profiles

The system displays a list of LDAP export profiles with the following information as shown in Fig. 14:

- Profile Name: A unique name for identification.
- Server: The Active Directory server name or the IP address of the Active Directory server.
- Start Node: The selected start node of the Active Directory to synchronize the users from.
- Scheduled Time: The time when the profile is scheduled for sync.
- Last Run Time: The last run date time when the profile got executed through the scheduler or was manually executed by clicking **Run Now**.
- Last Run Status: The status of the last execution of the profile; either success or failed.
- Status: The profile status. Can be one of the following:
 - Draft: The profile is not saved explicitly.
 - Ready: The profile is saved but not yet scheduled.
 - Active: The profile is saved and scheduled.

Actions

- Schedule Now or Update Schedule: Schedules the profile or updates the existing schedule.
- Edit: Edits the profile.
- Delete: Deletes the profile.

- **Run Now:** Is displayed when the status is either ready or active.

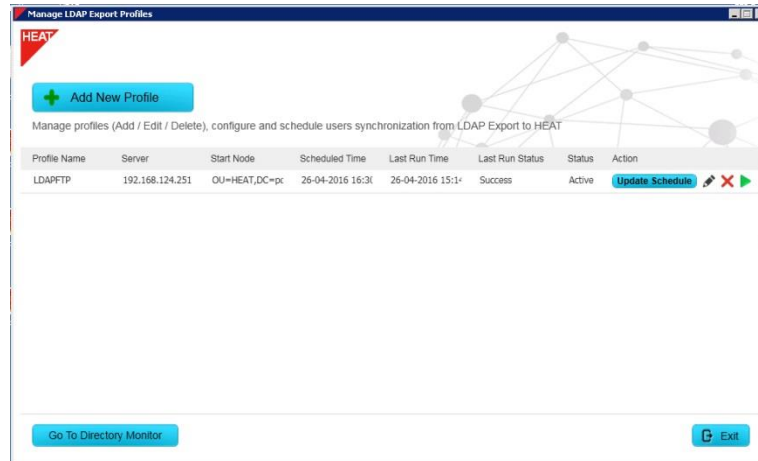


Fig. 14

Notes

- Mouse over each value in a profile list to view the complete data.
- If you click **Run Now** and there are no changes on the LDAP server, the system displays the message “No new / updated records found”.

Creating an LDAP Export Profile

You create an LDAP export profile in three steps as described below:

- Step 1: LDAP Connection Parameters
- Step 2: LDAP Root Node Parameters
- Step 3: Field Mapping Parameters

Step 1: LDAP Connection Parameters

This screen allows you to provide the LDAP connection values and connect to a specified LDAP server from which the users need to be imported.

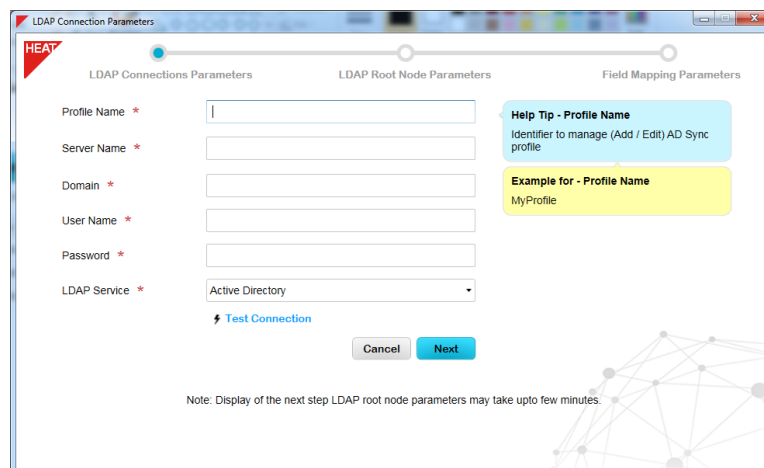


Fig. 15

1. Click **Add New Profile** on the Manage LDAP Export Profiles screen. The system displays the LDAP Connection Parameters screen as shown in Fig. 15. The system also displays help tips and examples for each field to the right as shown in Fig. 15.
2. Tab through each field to view the corresponding help tips and examples.
3. Enter the following information:
 - Profile name
 - Server name
 - Domain
 - User name
 - Password (displayed as dots)
4. Select the LDAP service from the list. The default is Active Directory.
5. Click **Test Connection** to check that you can connect with the provided connection parameters. If the connection is successful, the system displays “Test Connection Successful”; otherwise, it displays “Test Connection Failed”.
6. Click **Next**. The system saves the profile as draft and displays the LDAP Root Node screen. It can take a few minutes to display the list of root nodes based on the selected domain and server.

Step 2: LDAP Root Node Parameters

This screen displays the list of root and child nodes of the connected LDAP server and allows you to add and remove one or more nodes. The list of root and child nodes of the connected LDAP server would be displayed as shown in Fig. 16.

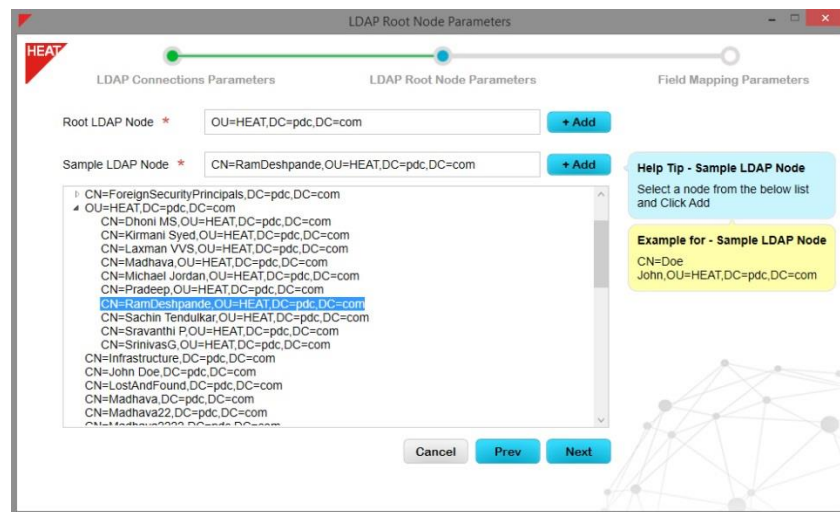


Fig. 16

1. Select a node from the list.
2. Click **Add to Root Node**. The system displays the selected node value in the “Root LDAP Node” field as shown in Fig. 16.
3. Expand the root node that you selected. The system displays a list of child nodes.
4. Select a child node from the list and click **Add to Sample Node**. The system displays the selected node in the text box for the “Sample LDAP Node” field as shown in Fig. 16.

5. To add multiple root LDAP nodes, select the node and click **Add to Root LDAP Node**. The system appends the additional nodes to the value in the text box.
6. To remove a node value from the text box, select the value and press **Delete** on the keyboard. Note that the sample LDAP node is always one. If you select a node and click **Add to Sample Node**, the system replaces the existing value in the field with the selected value.
7. Click **Next**. The system saves the data is saved and displays the Field Mapping Parameters screen.

Step 3: Field Mapping Parameters

This screen displays the list of HEAT Service Management users and LDAP fields, the HEAT Service Management roles, and the default field mapping. You can add and delete the default field mapping, select default values, and schedule the daily configuration at a specified time. The default view displays the four HEAT Service Management fields called LoginID, PrimaryEmail, FirstName and LastName and are mapped to the LDAP fields as shown in Fig. 17.

HEAT Field	LDAP Field	Use Default	Default Value	Required	Actions
LoginID	samaccountname	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
PrimaryEmail	mail	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
FirstName	givenname	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
LastName	sn	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Role to Assign New Users: Administrator, Change Manager, Configuration Manager, Discovery Analyst

Schedule this configuration daily at: 12:14:34 PM

Buttons: Run Now, Cancel, Prev, OK

Fig. 17

1. Click the HEAT Field drop-down list. The system displays the list of HEAT Service Management user fields as shown in Fig. 18.

HEAT Field	LDAP Field	Use Default	Default Value	Required	Actions
Address1		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Address1City		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Address1Country		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Address1Line2		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Address1State		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Address1Zip		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Birthdate		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
BusinessUnit		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Role to Assign New Users: Administrator, Change Manager, Configuration Manager, Discovery Analyst

Schedule this configuration daily at: 12:14:34 PM

Buttons: Run Now, Cancel, Prev, OK

Fig. 18

2. To add a new LDAP field, select a value from the HEAT Field drop-down list.
3. Click the LDAP Field drop-down list. The system displays the list of LDAP fields as shown in Fig. 19.

Fig. 19

4. Select a value from the LDAP Field drop-down list as shown in Fig. 20.

Fig. 20

5. In the Provide Value field, enter **IT**.
6. Click **Add**. The system adds the field mapping and displays the grid as shown in Fig. 21.

Fig. 21

7. To enable the default value for a specific field in the mapping, check **Use Default** for a field.
8. To have a field as required, check **Required** for a field.
9. To delete a field mapping, click **Delete**.
You can assign users to one or more HEAT Service Management roles by selecting from the role from the “Role to Assign new users” field.
10. Click a role in the list view.
11. Click another role in the list view.
12. Continue the above to select more than one role as shown in Fig. 22.
13. To deselect a role, click the highlighted role.
14. Continue the above to deselect more than one role.
15. You can schedule the configuration at a specific time daily through the “Schedule this configuration daily at” field. The default value in this field displays the current time as shown in Fig. 21.
16. Select the Hours value. Increase or decrease the hours.
17. Select the Minutes value. Increase or decrease the minutes.
18. Select the Seconds value. Increase or decrease the seconds.
19. Check **Schedule** to schedule the configuration at the specified time.

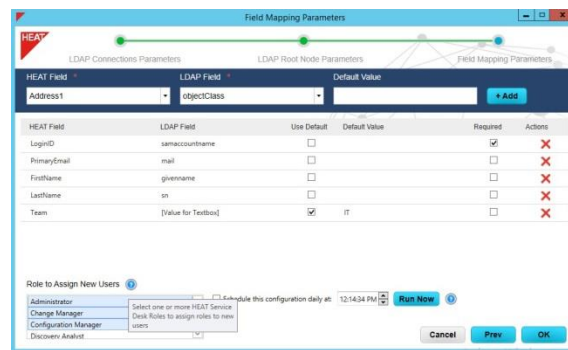


Fig. 22

20. Mouse over the blue help icon. The system displays a tool tip for the corresponding field as shown in Fig. 22.

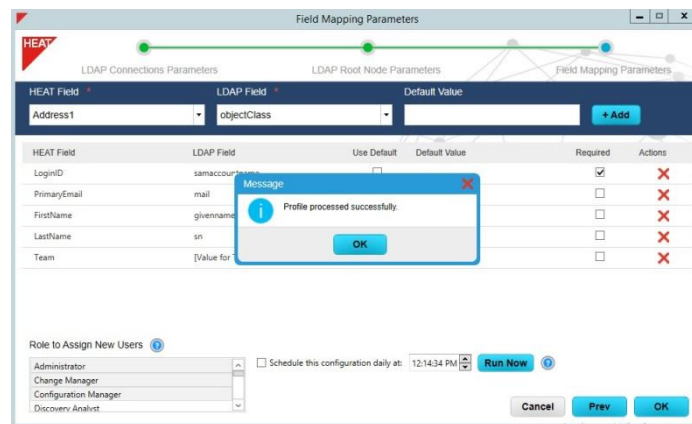


Fig. 23

21. To instantly generate the configuration for the profile, click **Run Now**. The system displays the “Profile processed successfully” message as shown in Fig. 23.
22. Without checking a schedule option, click **Next**. The system saves your changes, saves the profile with a status of ready, and displays the Manage LDAP Export Profiles screen.
23. Check a schedule option and click **Next**. The system creates a task in the windows task scheduler. The system saves your changes, saves the profile with a status of active, and displays the Manage LDAP Export Profiles screen.

Important

- To successfully import user data into HEAT Service Management, mark the Primary Email field as required.
- Map the Team field and mark it as required.

Editing an LDAP Export Profile

1. Click **Edit** for an LDAP profile. The system displays the LDAP connection parameters with the existing values. The profile name is disabled.
2. Update the fields as required.
3. Click **Next**. The system displays the LDAP Root Node Parameters screen with the existing values.
4. Update the fields as required.
5. Click **Next**. The system displays the Field Mapping Parameters screen with the existing values.
6. Update the fields as required.
7. Click **Ok**. The system changes the values and displays the Manage LDAP Export Profiles screen.
8. Click **Run Now**. If there are no changes on the LDAP server, the system displays the “No new / updated records found.” message.

Deleting an LDAP Export Profile

1. Click **Delete** for an LDAP profile. The system displays a confirmation message.
2. Click **Yes**. The system deletes the profile. If there are any schedules for this profile in the Windows Task scheduler, the system deletes the schedule entry.

Scheduling an LDAP Profile

If you save but do not schedule the LDAP profile, you can schedule the profile as follows:

1. Click **Schedule Now** for the LDAP profile. The system displays the pop-up window as shown in Fig. 24. By default, the system displays the current time in the schedule control.

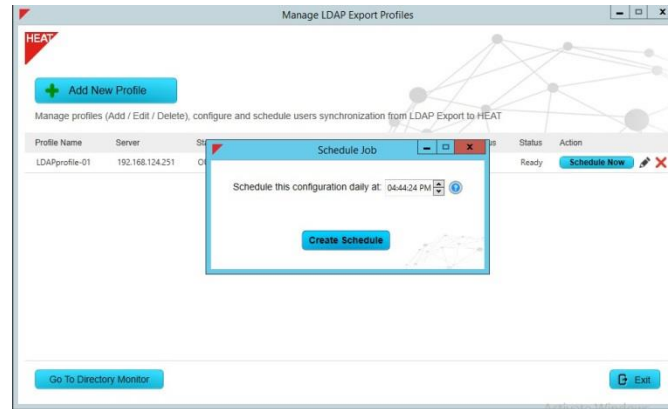


Fig. 24

2. Update the hours, minutes, and seconds for the job to schedule.
3. Click **Create Schedule**. The system schedules the LDAP profile at the specified time and creates a job in the windows task scheduler. The system updates the scheduled time.

Important

- Only users with administrator privileges can schedule a profile.
- If you do not have administrator privileges and you try to schedule a profile, the system displays the “Run as administrator” message. Exit the utility and open it by right clicking on the icon and selecting “Run as Administrator”.

Updating the Schedule of an LDAP Profile

You can update an existing LDAP schedule as follows:

1. Click **Update Schedule** for the LDAP profile. The system displays the pop-up window as shown in Fig. 25. By default, the system displays the current time.

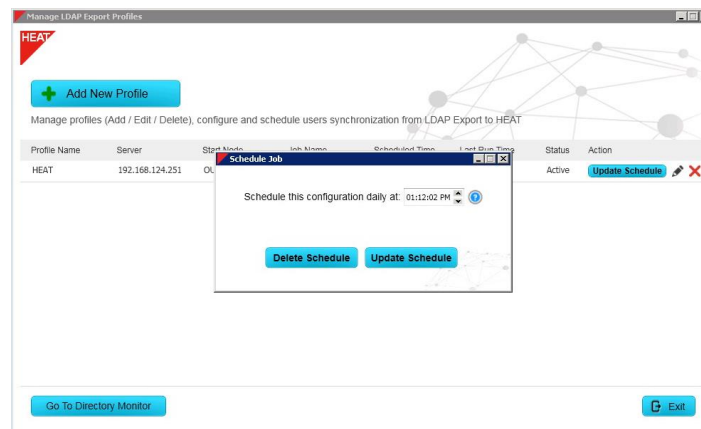


Fig. 25

2. Update the hours, minutes, and seconds for the job to reschedule.

3. Click **Update Schedule**. The system updates the schedule of the LDAP profile at the specified time and creates a job in the windows task scheduler. The system updates the scheduled time.

Deleting the Schedule of an LDAP Profile

You can delete an existing LDAP schedule as follows:

1. Click **Update Schedule** for the LDAP profile. The system displays the pop-up window as shown in Fig. 25. By default, the system displays the current time.
2. Click **Delete Schedule**. The system deletes the schedule and displays the scheduled time as blank.

6. Synchronizing the Directory Monitor

The directory monitor synchronization feature enables you to manage (add, edit, delete, or view) the FTP connections and profiles as shown in Fig. 26.



Fig. 26

You can navigate to this view in either of the following ways:

- From the log in screen, select the directory monitor value from the HEAT Service drop-down list.
- Click **Go To Directory Monitor** from the Manage LDAP Export Profiles screen.

7. Working with FTP Connections

Viewing FTP Connections

This screen displays the list of FTP connections with the following details as shown in Fig. 26:

- Profile name
- Connection type
- User name
- Server

Actions

- Edit

- Delete

Adding an FTP Connection

You can add an FTP, SFTP, HTTPS, or network share connection as follows:

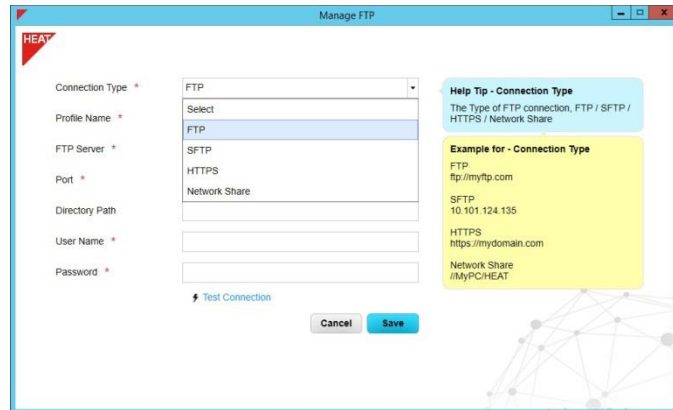


Fig. 27

1. Click **Add FTP**. The system displays the screen shown in Fig. 27.
2. Click the Connection Type drop-down list. The system displays the values and by default, FTP is selected. The system also displays a help tip and an example is displayed for each field to the right
3. Tab through each field to view the corresponding help tip and example.
4. Enter the profile name.
5. Enter the FTP server. The system automatically displays the port value based on the connection type. It can be 21 for FTP, 22 for SFTP, and 443 for HTTPS.
6. Enter the directory path (the target folder where the files need to be uploaded).
7. Enter the user name and password.
8. Click **Test Connection** to check the whether you can connect with the provided credentials. If the connection is successful, the system displays “Test Connection Successful”; otherwise it displays “Test Connection Failed”.
9. Click **Save**. The system saves the FTP connection is saved successfully and the “Configure Directory Monitor Synchronization” screen displayed.

Editing an FTP Connection

You can edit an FTP, SFTP, HTTPS, or network share connection as follows:

1. Click **Edit** for an FTP connection. The system displays the FTP connection with the existing values and the profile name is disabled.
2. Update the fields as required. The system displays the “Configure Directory Monitor Synchronization” screen.

Deleting an FTP Connection

You can delete an FTP, SFTP, HTTPS, or network share connection as follows:

1. Click **Delete** for an FTP connection. The system prompts you for confirmation.
2. Click **Yes**. The system deletes the FTP connection if there is no reference to this connection within a profile. If it is referenced within a profile, the system does not delete it.

8. Working with Directory Monitor Profiles

Viewing Directory Monitor Profiles

This screen displays the list of directory monitor profiles with the following details as shown in Fig. 26:

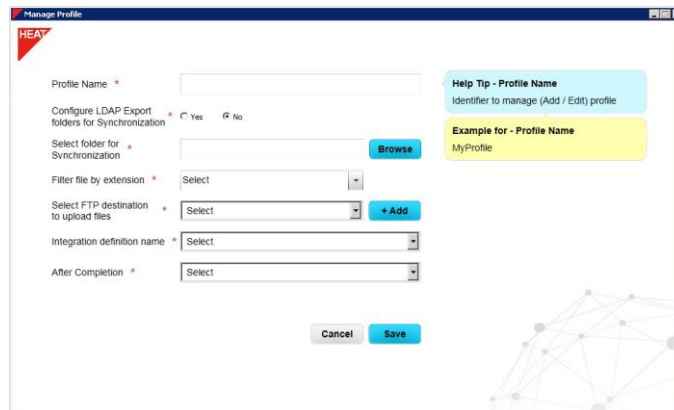
- Profile Name
- Configured for LDAP Export
- Folder Path
- File Types
- FTP Location
- Status

Actions

- Activate / Deactivate
- Edit
- Delete

Adding a Directory Monitor Profile

You can add a directory monitor profile as follows:



The screenshot shows the 'Manage Profile' window with the following fields and options:

- Profile Name ***: A text input field.
- Configure LDAP Export folders for Synchronization ***: Radio buttons for 'Yes' and 'No'.
- Select folder for Synchronization ***: A text input field with a 'Browse' button.
- Filter file by extension ***: A dropdown menu with 'Select' as the current value.
- Select FTP destination to upload files ***: A dropdown menu with 'Select' as the current value and an '+ Add' button.
- Integration definition name ***: A dropdown menu with 'Select' as the current value.
- After Completion ***: A dropdown menu with 'Select' as the current value.

On the right side of the dialog:

- Help Tip - Profile Name**: Identifier to manage (Add / Edit) profile.
- Example for - Profile Name**: MyProfile.

At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Fig. 28

1. Click **Add New Folder to Sync**. The system displays the Profile screen as shown in Fig. 28.
2. Enter the profile name.
3. For the “Configure LDAP Export folders for Synchronization” field, select **Yes** to map the LDAP data folder as the source path. The system disables the “Select folder for Synchronization” field and displays the LDAP data folder path.

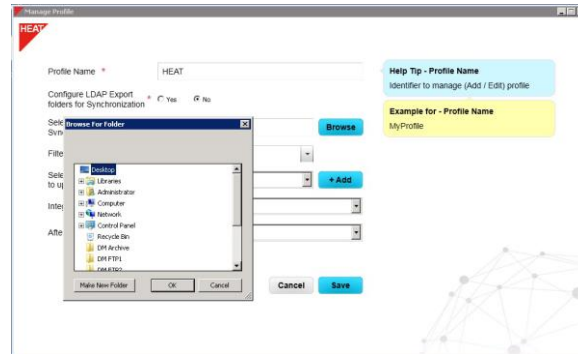


Fig. 29

4. For the “Select folder for Synchronization” field, click **Browse**, as shown in Fig. 29.
5. Select a folder from the list. The system displays the path of the folder.

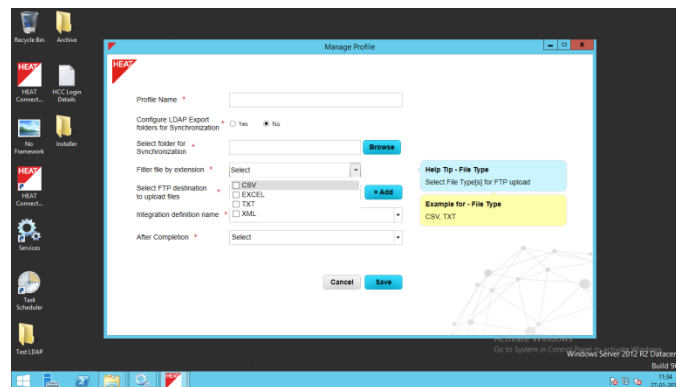


Fig. 30

6. Click the “File filter by extension” drop-down list and select CSV, EXCEL, TXT, or XML, as shown in Fig. 30.
7. Click the “Select FTP Destination to upload files” drop-down list and select a value from the list.
8. To add a new FTP connection, click **Add**. The system displays the New FTP Connection screen.

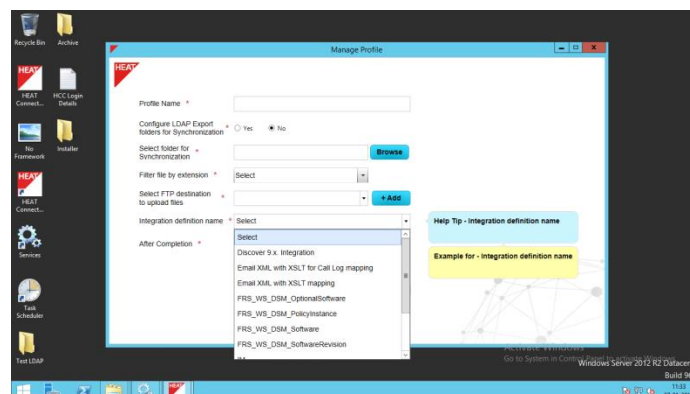


Fig. 31

9. Click the “Integration Definition Name” drop-down list and select a value from the list.

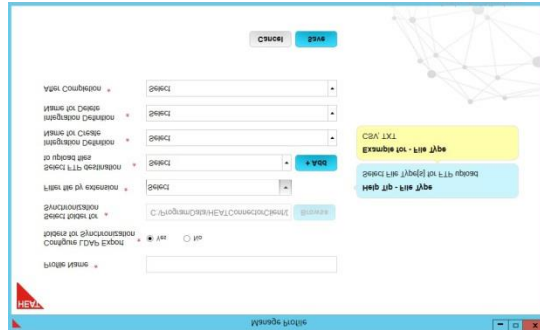


Fig. 32

- If the value for “Configure LDAP Export folder for Synchronization” is set to No, the system only displays the “Integration Definition Name” field.
 - If the value for “Configure LDAP Export folder for Synchronization” is set to Yes, the system displays the “Integration Definition Name for Create” and the “Integration Definition Name for Delete” fields as shown in Fig. 32.
10. Select the corresponding values from the drop-down lists for each of the fields.

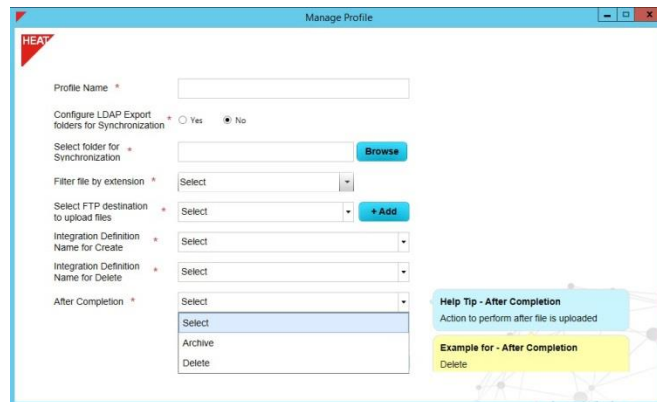


Fig. 33

11. Click the “After Completion” drop-down list. The system displays the values of archive and delete as shown in Fig. 33.
12. To archive the file in the source folder after uploading it to the FTP, do the following:
 - a. Select **Archive**.
 - b. Click **Browse**.
 - c. Select a folder from the list.
13. To delete the file from the source folder after uploading it to the FTP, select **Delete**.
14. Click **Save**. The system saves the data and displays the “Configure LDAP Export folders for Synchronization” screen with the profile data.

Editing a Directory Monitor Profile

You can edit a directory monitor profile as follows:

1. Click **Edit** for a directory monitor profile. The system displays the profile with the existing values and disables the profile name.
2. Update the fields as required.
3. Click **Save**. The system updates the values and displays the “Configure LDAP Export folders for Synchronization” screen with updated values.

Deleting a Directory Monitor Profile

You can delete directory monitor profile as follows:

1. Click **Delete** for a directory monitor profile. The system displays a confirmation message.
2. Click **Yes**. The system deletes the profile.

Activating a Directory Monitor Profile

By default, when you create a profile, the system sets the status to inactive. You can activate a directory monitor profile as follows:

1. Click **ON** for the profile to activate. The system toggles the button to OFF and displays the status of the profile as active.

Deactivating a Directory Monitor Profile

You can deactivate a directory monitor profile as follows:

1. Click **OFF** for the profile to deactivate. The system toggles the button to ON and displays the status of the profile as inactive.

9. Working with Logs

About Working with Logs

Logs record events, activities, and errors during the execution of the HEAT Connector Client utility.

The HEAT Connector Client utility supports the following types of logs:

- Error log: This document records all the errors with the error description, date, and time of the error occurrence.
- Profile event log: This document records all of the activities and events that occur on a profile.
- Service event log: This document records all of the activities pertaining to the service.

The logs for the HEAT Connector Client utility are located in the path
C:\ProgramData\HEATConnectorClient\Logs.

Note

Whenever a log gets too big, as determined by the file size limit specified in the configuration file, the system renames the current log with the date and time and archives it in the same path. The system then creates a new log file where subsequent errors and activities are logged. To change the file size limit, update the corresponding configuration file.

Error Log, Profile Event Log

To update the file size limit for the error log or profile event log, update the configuration file located at C:\ProgramFiles(x86)\HEAT Connector Client\HEATConnectorClient.exe.config.

1. Open the file in a text editor.
2. Navigate to the parameter <add key="LogFileSize" value="5" />. The default value is 5 MB.
3. Change the value.
4. Save the file.

Service Event Log

To update the file size limit for the service event log, update the configuration file located at C:\Program Files (x86)\Directory Monitor Service\DirectoryMonitorService.exe.config.

1. Open the file in a text editor.
2. Navigate to the parameter <add key="LogFileSize" value="5" />. The default value is 5 MB.
3. Change the value.
4. Save the file.

Important

Whenever you change the log file size, you must restart the Directory Monitor Service to apply the new value.

10. Working with CSV Files

Generating a CSV File

You can generate a CSV file in one of two ways:

- When you schedule an LDAP export profile.
- When you click **Run Now** on the LDAP Export Field Mapping screen.

The generated CSV file has the following naming convention:

- When performing a full synchronization or when adding new users to the Active Directory server, the file name is <LDAP Profile Name>_CreatedUpdated.csv.
- When there are deleted records in the Active Directory Server, after synchronization the CSV file name is <LDAP Profile Name>_Deleted.csv.

Archiving a CSV File

The system archives the generated CSV file when you configure the directory monitor service source folder to archive the CSV file in a specified archive folder. The CSV file is archived with the following name: <LDAP Profile Name>_CreatedUpdated_Date_Time.csv>.

11. Importing Users to a HEAT Service Management Instance

This section describes the steps to create, configure, schedule, and generate a CSV and import the users into the HEAT Service Management instance.

Configuring the LDAP Import Connection

1. Log in to the HEAT Service Management instance.
2. Navigate to the Configuration Console.
3. Select **Integration Tools > Data Import Connections**.

Ensure that the correct CSV file is available in the FTP location before creating a data import connection. The CSV file should have the same name as the LDAP export profile to be configured. For example, if the LDAP export profile in the HEAT Connector Client utility is called Profile1, the generated CSV should be called Profile1_CreatedUpdated.csv. The same file should be available in the FTP location. When configuring the data import connection, provide this CSV file name for correct mapping of fields.

4. Create a new data import connection by selecting **Integration Tools > Data Import Connections**.
5. Click **Add New**. The system displays 6 steps:
6. For the “Connection Setting” step, enter the following:
 - Enter a connection name.
 - Select a connection type from the drop-down list.
 - Enter the server path.
 - Enter the name of the data (CSV) file. Ensure that this file is available in the FTP location before proceeding to next step.
 - Enter the user name and password for the FTP connection.
 - Select the file type based on the data file type. By default, the value is CSV.
 - Click **Test Connection**. The system checks the FTP server, authenticates the availability of the CSV, and displays the status as success.
7. Click **Next**. The system displays the “Object Mapping” step.
8. Enter the following:
 - Enter the mapping name.
 - Select the source unique key from the list of fields displayed from the CSV file.
 - In the Target Business Object text box, enter employee.
9. Click **Filter by Name**.
10. In the resultant list, select the value **Employee [Employee#]**.
11. Click **Next**. The system displays the “Filter Setting” step where you filter only certain records from the source file.
12. Create a filter and add the field and conditions to filter only those records. Do not click **Create Filter** if you want all the records in the source file.
13. Click **Next**. The system displays the “Field Mapping” step where you map the fields for the selected source file and the target employee business object.
14. Review the mapping and add or delete each field to be included or excluded.
15. Click **Next**. The system displays the “Schedule Setting” step and displays the list of available schedules.

16. To schedule an import, select an available schedule from the list.
17. Click **Next**. The system prompts you for confirmation.
18. Click **Yes**. The system displays the “Review and Publish” step.
19. Click **Preview**. The system displays a pop-up with the list of records and values.
20. Close the popup.
21. Click **Publish**. The system displays “Published”.
22. Click **Ok**. The system displays a list of data import connections.

Important

You must configure another connection specifically for deleted records. The process is the same as above except that for the field mapping step, you must make the mappings as follows:

- Only three fields need to be mapped.
- Map the login ID in the source file to the login ID of the employee.
- Enter a static value of “Terminated” in a field of source file and map it to the status field of the employee.
- Enter a static value of “1” in a field of source file and map it to the disabled field of the employee.

When you successfully import deleted records, the system displays the employee records in the employee workspace with the status of “terminated”.

Generating the CSV and Scheduling

1. Log in into the HEAT Connector Client utility with the tenant URL.
2. Access the tenant instance.
3. Navigate to the directory monitor section.
4. Create an FTP connection.
5. Create a directory monitor profile by doing the following:
 - a. Select **Yes** for “Configure LDAP Export folder for Synchronization”.
 - b. Select the FTP destination with the FTP connection name created above.
 - c. Select the integration definition name to that of the created in data import connection in the HEAT Service Management instance.
 - d. For the “After Completion” field, select **archive** if you want to archive the CSV or select **delete** if you want to delete the CSV.
6. In the list of directory monitor profiles, activate the profile by clicking ON/OFF for the newly created profile.
7. Navigate to the LDAP export profile section.
8. Create an LDAP export profile.
9. After the scheduled time of the LDAP export profile passes, check the last run status; it should display a status of success.
10. Navigate to the Employee workspace in the HEAT instance and search for the newly created users.

The system successfully creates the users and displays their details.

Note

If the schedule does not work, the system does not generate the CSV file, you cannot import users, or you encounter any other errors, check the logs and then contact your system administrator.

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