

# HEAT Connector Client Utility

Developed by HEAT Software USA, Inc.



Version 1

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## Purpose

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.

## Interoperability / Compatibility:

The HEAT Connector Client utility can be applied to the following HEAT Software products:

### HEAT Software Product: HEAT Service Management

Minimum Version: 2016.1

Required installed HEAT Software modules/add-ons: None

## Other Prerequisites

The following are the 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
- Acrobat reader: Version 7 or higher
- 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 Prerequisites

- Microsoft Windows 7 or higher (32-bit and 64-bit)

## Installing the HEAT Connector Client Utility

Refer to the installation section of the *HEAT Connector Client Utility User Guide*.

#### Notes:

- You can install the HEAT Connector Client utility on any machine that is always running.
- You can install the HEAT Connector Client utility on any number of machines, but you can also configure multiple Active Directory synchronization servers from a single installation.
- You must have administrator permissions to install or uninstall the HEAT Connector Client utility.
- While creating the FTP, SFTP, and HTTPS connections, the utility displays the default port numbers. If you have specific port numbers other than the default values, update them when you create the FTP connections.

## Configuration Instructions

The configuration file is located in the directory where you installed the HEAT Connector Client utility. For example, it may be located at C:\Program Files(x86)\HEAT Connector Client\HEATConnectorClient.exe.config.

The installer automatically specifies the default values during installation. To change the default values in the configuration file, open the file in any text editor.

You can configure the following parameters:

- LDAPNodeMaxValue: Max number of items in the LDAP nodes
- HeatApplicationFolder: Name of the application folder
- RFLDefaultFTPPortNo: Default port number for FTP
- RFLDefaultSFTPPortNo: Default port number for SFTP
- RFLDefaultHTTPSPortNo: Default port number for HTTPS
- RFLFileTypes: Type of files supported
- RFLFileSize: File size
- HEATServiceExt: URL of the HEAT Service Management tenant
- SchedulerFolder: Name of the scheduler folder
- LogFileSize: Size of the log file
- LDAPFilter: LDAP filter

While configuring the integration definition in the HEAT Service Management Configuration Console, ensure that a sample or template of the import file is available in the FTP, SFTP, HTTPS, and network share selected locations to map the fields and configurations.

Note: You must have administrator permissions to schedule the daily LDAP configuration.

## Testing the Implementation

1. After installation, check the system services. The HEAT Directory Monitor Service should be installed and display a status of “started”.
2. Open the HEAT Connector Client utility. It should display the HEAT Connector Client and HEAT Connector Client Utility User Guide menus.
3. Click the HEAT Connector Client menu. It should display the log-in screen.
4. Click the *HEAT Connector Client Utility User Guide*. It should open the user manual in Adobe Acrobat.

5. Enter the URL of the HEAT Service Management tenant and then log in using the user name and password. The utility should authenticate and log you in successfully.
6. Create an FTP connection and click **Test Connection**. The utility should display “Connection Successful”.
7. Create an LDAP profile and click **Test Connection** in the LDAP connection. The utility should display “Connection Successful”.
8. Click **Run Now** against the LDAP profile. The utility should display the “Profile Processed Successfully” message and generate a CSV (located in the installation path at C:\ProgramData\HEATConnectorClient\Data).
9. In the LDAP profile, navigate to the second step, called LDAP Root Nodes, and check that all of the respective nodes of the selected active sync directory are displayed.
10. In the LDAP profile, navigate to the third step, called LDAP Field Mapping, and check that the list of HEAT Service Management roles, employee business object fields, and LDAP fields are displayed.
11. Execute the end-to-end test case, by doing the following:
  - a. Log in into the HEAT Connector Client utility.
  - b. Create an FTP connection.
  - c. Create a directory monitor profile.
  - d. In the profile created, do the following:
    - i. Set the Configure LDAP Export folder for Synchronization to true.
    - ii. Set the After Completion field value to archive and select an archive folder.
    - iii. Set the Integration Definition Name for create and delete fields to the appropriate values in the drop-down menus.
  - e. Create an LDAP profile.
  - f. Schedule a sync for a specific date and time.
  - g. Activate the directory monitor profile.
  - h. After the scheduled time has elapsed, check the following:
    - i. The values of the Last Run Time and Last Run Status fields for the LDAP profile. The value of the Last Run Time field should display the time the scheduler has run. The value of the Last Run Status field should display “success”.
    - ii. Check the archive folder. The utility should have created a CSV file with the date and time stamp suffixed.
  - i. Check the URL of the Employee workspace for the HEAT Service Management tenant. The utility should import and list new users and update existing users if there are any changes. Any users deleted from Active Directory should display a status of “terminated” after the schedule and synchronization.

## How to Use the HEAT Connector Client Utility

Refer to the *HEAT Connector Client Utility User Guide*.

## Troubleshooting Tips

Some possible steps that you might want to check are:

- Check the error log, service event log, and profile event log available in the installed location or at C:\ProgramData\HEATConnectorClient\Logs.
- Check the test connection for FTP and LDAP profiles.
- Check that the directory monitor service is running.
- Check that the HEAT Service Management tenant URL is valid and accessible.
- Check that the FTP credentials are valid and accessible.
- Check that the integration definitions are configured correctly in the HEAT Service Management Configuration Console.
- Check that the integration definitions are correctly mapped in the directory monitor profile.
- Check that the directory monitor profile is activated.
- Check that the active sync directory credentials are valid and that the corresponding nodes are listed.

## Support Information

The HEAT Connector Client utility is provided as is. Support for HEAT Service Management is provided by HEAT Software.