

Step by step

# How to setup user login through LDAP Server

# Step 1

The screenshot shows the IQ-RM PRO software interface. The title bar reads "IQ-RM PRO - APIS Informationstechnologien GmbH [10000-50] - Personal Desktop". The menu bar includes "File", "Edit", "View", "Format", "Administration", "Editors", "CARM Server", "Consolidation", "Tools", "Window", and "Help". The "Tools" menu is open, showing options such as "Document settings...", "Workstation settings", "Update template...", "Read template...", "Access rights...", "NLX", "Select document language...", "Translate...", "Create a new document language...", "Delete document language...", "Change reference language...", "Forms/Reports", and "Parameters for classification calculation...". The "Document settings..." option is highlighted in blue. In the main workspace, the text "Open 'Document settings...'" is written in red. The interface also shows a "Personal Information Manager (PIM)" window with "Public" and "Private" tabs.

Open an FME file and  
the go to “Tools |  
Document settings...”

Opens a dialog for the document settings

## Step 2

The screenshot shows a dialog box titled "Document settings für C:\cfg\AutoSave-20160616T141553.fme". The "Administration" category is selected in the left sidebar and highlighted with a red circle. The main content area is titled "Administrator settings for the current document" and contains the following text:

Changes here can only be made by the administrator.

Use LDAP server for user login

Only persons who have been imported from the LDAP Interface can log on to the IQ software. When registering a person in the IQ software the authentication will be verified over the LDAP Interface.

Note: It is necessary to be connected to an LDAP-Server to be logged on.

A red circle highlights the "Use LDAP server for user login" checkbox, and a red arrow points from this circle to the text "Select the box" below the dialog box.

Click on  
"Administration"  
and select the  
box. Then click  
"OK"

## Step 3

The screenshot shows the IQ-RM PRO software interface. The 'Administration' menu is open, and the 'Teams and persons' option is highlighted. The interface includes a menu bar with 'File', 'Edit', 'View', 'Format', 'Administration', 'Editors', 'CARM Server', 'Consolidation', 'Tools', 'Window', and 'Help'. The 'Administration' menu contains the following items: Project Management..., FMEA Forms Management..., Process Flow Management..., Control Plan Management..., Statistics management..., Teams and persons (highlighted), Symbolic responsibilities/deadlines, Catalogs, Terminology/Translation, Notes list, Valuation catalogs, Symbol Palettes, Risk matrices, Attributes and categories, User-defined strings, Machines, Inspection equipment, and Assistant Rules. The main window displays 'Personal Information' with 'Public' and 'Private' tabs. A status bar at the bottom reads 'Opens the editor for management of teams and persons'.

**Open "Teams and persons" in the Data Manager**

Go to the Data Manager by clicking on "Administration | Teams and persons"

## Step 4

IC-IRM PRO - APIS Informationstechnologien GmbH [10000-50] - Data Manager

File Edit View Editors Tools Help

Save Ctrl+S

Export >

Import >

Contents Management...

Send as e-mail...

Print preview...

Print... Ctrl+P

Presentation print...

Web Publisher...

1 C:\Users\Daniel\Desktop\rp\_4368.fme

2 C:\Users\Daniel\Desktop\EXAMPLE.fme

3 Document1

Exit

Notes list

Valuatio...

Palettes

Person	Department	Job title	Site
Kasper	Detlef		
Peach	Marcel		
Priebke	Claas		
	D-PT	Development	
	FV-PO	Process Planning	
	RD-S	System develop-ment	
	FV-PO	Process Planning	
	D-PT	Development	

Import persons via LDAP

Click on “File | Import | Import persons (LDAP)...”

## Step 5

Import persons (LDAP)
✕

Settings Mapping Import

LDAP server:

Root distinguished name:

Port:

Use TLS

Use authentication

User:

Password:

Connection was not tested yet.

**This information is available from your company's IT department**

**Click here**

**Make sure to only select departments in "Root distinguished name:" that are relevant, otherwise the list that follows could be huge**

Enter in the LDAP Server name, RDN, Port, and if necessary also the username and password. This information can be obtained from your company IT department. Make sure to only enter the departments in RDN if possible, otherwise the list that displays after clicking "Test connection" could be huge.

# Step 6

Import persons (LDAP)
✕

Settings Mapping Import

LDAP server:

Root distinguished name:

Port:

Use TLS

Use authentication

User:

Password:

Connect to server... OK.

LDAP directory tree: people

- └─ roysmith99
- └─ jamesmith99
- └─ eileenrogers99
- └─ danieladams99
- └─ petercarrey99
- └─ .....
- └─ .....
- └─ .....

If the connection is successful, a list of company usernames will be displayed. This list will be limited to the commands in the "Root distinguished name:"

**A list of company usernames will appear here. (limited to "production" & "design" departments)**

# Step 7

Import persons (LDAP) ✕
Settings
Mapping
Import

Assign LDAP fields to appropriate person attributes. (1) Select an attribute in the list, open context menu by clicking right mouse button and select LDAP field from the context menu or (2) drag an attribute from the LDAP directory tree onto the attribute.

Attribute	Field	Filter	Use for comparison
Title			
Department			
E-mail			
Fax			
First name			
Job title			
Name			
User name			
Password			
Phone			
Site			

LDAP directory tree  
Drag a leaf node from the LDAP directory tree containing a LDAP field name onto a person attribute.

LDAP directory tree: people
 

- + oysmith99
- +
 jamesmith99
- +
 eileenrogers 99
- +
 danieladams 99
- +
 petercarrey99
- +
 .....
- +
 .....
- +
 .....

Open up an employee username.  
 Only one is necessary to  
 complete this process

Close

Click on “Mapping” and select just one username from the list and open it up by clicking on the “+” symbol



# Step 8

Import persons (LDAP) [X]

Settings **Mapping** Import

Assign LDAP fields to appropriate person attributes. (1) Select an attribute in the list, open context menu by clicking right mouse button and select LDAP field from the context menu or (2) drag an attribute from the LDAP directory tree onto the attribute.

Attribute	Field	Filter	Use for comparison
Title			
Department			
E-mail	mail	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>
Fax			
First name	givenname	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>
Job title			
Name	sn	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>
User name	uid	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>
Password			
Phone			
Site			

LDAP directory tree  
Drag a leaf node from the LDAP directory tree containing a LDAP field name onto a person attribute.

```

roysmith99
├── cn (Roy Smith)
├── mail (roy.smith@apis.de)
├── givenname (Roy)
├── uid (roysmith99)
├── sn (Smith)
├── homedirectory (/home/smith99)
└── loginshell (bin/.....)
    
```

**These will display automatically, once you have completed the process below**

**Select the fields you want. Click and hold e.g. "uid" and drag it up to "User name" and release the mouse. This only has to be done 1 time to define the mapping**

Close

We recommend that you fill in at least the username and email, but also the first and last name. You can of course fill in every row possible, if the information is available on the LDAP Server. Simply left click and hold on e.g. "uid (username)" and drag it up to "User name". The information to the left will automatically fill up i.e. "Field, Filter & Use for comparison". This is the mapping process and you are deciding here which information will be transferred to "Teams and persons". When you are done, click on "Import" at the top

## Step 9

Import persons (LDAP) ×

Settings Mapping **Import**

22 matches found.

Email	First name	Name	User name
<input checked="" type="checkbox"/> roy.smith@apis.de	Roy	Smith	roysmith99
<input checked="" type="checkbox"/> james.smith@apis.de	James	Smith	jamessmith99
<input checked="" type="checkbox"/> eileen.rogers@apis.de	Eileen	Rogers	eileenrogers99
<input checked="" type="checkbox"/> daniel.adams@apis.de	Daniel	Adams	danieladams99
<input checked="" type="checkbox"/> peter.carrey@apis.de	Peter	Carrey	petercarrey99
<input type="checkbox"/> tim.simmons@apis.de	Tim	Simmons	timsimmons99
<input type="checkbox"/> john.rimmond@apis.de	John	Rimmond	johnrimmond99
<input type="checkbox"/> example.123@apis.de			
<input type="checkbox"/> .....@apis.de			
<input type="checkbox"/> .....@apis.de			
<input type="checkbox"/> .....@apis.de			
<input type="checkbox"/> .....@apis.de			
<input type="checkbox"/> .....@apis.de			
<input type="checkbox"/> .....@apis.de			


**Click "Find". A list of names will be displayed. Chose the ones to go into the FME file by ticking the boxes. Then click "Import".**

Find Select all Select none Import... Close

To bring up the list click "Find". The list will show up with the information of the rows you selected in "Mapping". We selected: Email, first name, last name, username. Then chose the persons you want to be transferred to "Teams and persons" and then click "Import".

## Step 10

IQ-RM PRO

 Load the items to the server?  
(5 items will be added and 0 items will be updated)

This dialog will display, informing you how many usernames will be added. If this is not your first time importing data from the LDAP server, you may update user's information as well.

## Step 11

Here you will see your newly imported list in "Teams and persons"

IQ-RM PRO - APIS Informationstechnologien GmbH [10000-50] - Data Manager

File Edit View Editors Tools Help

Persons

**Teams and persons:**

Drag a column here to group by this column

Name	First name	E-mail	User name	Create persons	LDAP-ID
Teams and persons C:\Users\Daniel\Desktop\EXAMPLE.fme					
Name	First name	E-mail	User name	Create persons	LDAP-ID
Smith	Roy	roy.smith@apis.de	roysmith99	<input type="checkbox"/>	✓
Smith	James	james.smith@apis.de	jamessmith99	<input type="checkbox"/>	✓
Rogers	Eileen	eileen.rogers@apis.de	eileenrogers99	<input type="checkbox"/>	✓
Adams	Daniel	daniel.adams@apis.de	danieladams99	<input type="checkbox"/>	✓
Carrey	Peter	peter.carrey@apis.de	petercarrey99	<input type="checkbox"/>	✓
Bonewski	Hans			<input type="checkbox"/>	
Hehre	Claudia			<input type="checkbox"/>	
Kasper	Detlef			<input type="checkbox"/>	
Peach	Marcel			<input type="checkbox"/>	

C:\...Desktop\EXAMPLE.fme | 14 items | Supervisor | §§: Read/write | 100% | >English

# Step 12

The screenshot shows the 'Tools' menu open in the 'Data Manager' window. The 'Update template...' option is highlighted in blue. The background table contains the following data:

Name	Create persons	LDAP-ID
Smith	<input type="checkbox"/>	✓
Smith	<input type="checkbox"/>	✓
Rogers	<input type="checkbox"/>	✓
Adams	<input type="checkbox"/>	✓
Carrey	<input type="checkbox"/>	✓
Bonewski	<input type="checkbox"/>	
Hehre	<input type="checkbox"/>	
Kasper	<input type="checkbox"/>	
Deach	<input type="checkbox"/>	

Applies the current configuration to the template file

Update your template file by clicking on “Tools | Update template”. If you create a new FME file in the future on this workstation (or network, if you have a network license), these usernames will automatically be part of the FME file.

## Step 13

IQ-RM PRO - Template components

Select the components to be written in the template file

- Document settings
- Header labels
- Header/footer contents
- Print jobs
- Column labels
- Rules for classification assignment
- User-defined views
- Filter
- Risk matrices
- Symbol palettes
- Evaluation catalogs
- Teams and persons
- User-defined attributes
- Machines/inspection equipment
- Symbolic deadlines
- Notes/function categories
- Statistical Analysis Schemes

OK  
Cancel  
Help  
All  
None

Select the box “Teams and persons” and then click on “OK”

# Step 14

IQ-RM PRO - APIS Informationstechnologien GmbH [10000-50] - Data Manager

File Edit View Editors Tools Help

Save Ctrl+S

Export >

Import >

Contents Management...

Send as e-mail...

Print preview...

Print... Ctrl+P

Presentation print...

Web Publisher...

1 C:\Users\Daniel\Desktop\EXAMPLE.fme

Exit

Save & then close the Data Manager & the FME file

	User name	Create persons	LDAP-ID		
and persons					
esktop\EXAMPLE.fme					
ith@apis.	roysmith99	<input type="checkbox"/>	✓		
Smith	James	james.smith@apis.de	jamessmith99	<input type="checkbox"/>	✓
Rogers	Eileen	eileen.rogers@apis.de	eileenrogers99	<input type="checkbox"/>	✓
Adams	Daniel	daniel.adams@apis.de	danieladams99	<input type="checkbox"/>	✓
Carrey	Peter	peter.carrey@apis.de	petercarrey99	<input type="checkbox"/>	✓
Bonewski	Hans			<input type="checkbox"/>	
Hehre	Claudia			<input type="checkbox"/>	
Kasper	Detlef			<input type="checkbox"/>	
Deach	Marcel			<input type="checkbox"/>	

Save changes to current document

Save the changes you have made by clicking on “File | Save”. Then close both the Data Manager and the IQ Software as well, to see if your changes have been made.

# Step 15

The screenshot shows the 'Please log in' dialog box for the file 'C:\Users\Daniel\Desktop\EXAMPLE.fme'. The 'User' list includes Daniel, Adams; Eileen, Rogers; James, Smith; Peter, Carrey; Roy, Smith (selected); and Supervisor. A red text overlay states: 'When opening this FME file, a password will always be required. This will be accessed through the LDAP server. A connection to the LDAP server must exist.' Below this, a smaller dialog box titled 'IQ-RM PRO - C:\Users\Daniel\Desktop\EXAMPLE.fme' prompts for the password for user 'Roy' (roysmith99) with an input field and 'OK' and 'Back' buttons. At the bottom of the main dialog, there are 'Login', 'Cancel', and 'Help' buttons, and an 'Administration...' button.

Reopen the IQ Software and open the same FME file. This dialog should appear before any changes can be made to the file. Simply inform the users of the FME file that they must now login using their company password.  
There you go! More power to the administrator!