Metatude

Lotus Domino LDAP Configuration Guide

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Table of Contents

1 Introduction

1.1 About Metatude

The Metatude software suite allows you to collect feedback on the performance and activities of your company from stakeholders such as customers, business partners, co-managers and employees. This information is vital to your company because it allows you to fine-tune your business activities and company policies to the perception of your performance. And it is this information that will allow you to gauge and influence what others say and think about your company, something that can make or break you. Essential information that constitutes the basis for your business decisions.

Metatude's web-based software allows you to collect feedback on issues such as:
- customer satisfaction and loyalty;
- employee commitment;
- corporate reputation;
- business ethics;
- service level management.

Metatude is designed for large organizations whose IT infrastructure may be complex and have many stakeholders. Once the software is installed you can easily define target groups, create questionnaires, conduct research and manage output for analysis and reporting tools.

For more information on Metatude software, technology and business examples, please consult our website: http://www.metatude.com

1.2   About this manual

This manual will show you how to configure your Lotus Notes Domino R5 server for use with the Metatude software suite. First, this manual explains how to configure the Domino server for use with LDAP (Lightweight Directory Access Protocol). The Metatude Dialogue Server can then retrieve stakeholder information from the Domino server, using the LDAP protocol.

With the Metatude Project Manager you can add stakeholder directories that can be used in your stakeholder feedback projects. This manual describes how to add your Domino server as a stakeholder directory. You can find more information about stakeholder directories in the manual for the Metatude Project Manager.

This manual is dated April 23 2003; Metatude will update this documentation if needed. Please check http://www.metatude.com/support/ for recent versions of this document.

1.3   The Metatude suite

The Metatude software suite consists of four interacting software components:

1. **Metatude Dialogue Server;**
2. **Metatude Channel Integration Components;**
3. **Metatude Dialogue Designer;**
4. **Metatude Project Manager.**

The basis of the Metatude architecture is a central server (*Metatude Dialogue Server*) that needs to be installed in your organization. This server maintains the connections with databases, stores and serves the dialogues to stakeholders and collects and stores the collected data in a database.

Once the *Dialogue Server* is installed, you can manage any stakeholder feedback with two desktop applications that are relevant for the regular user: the *Metatude Dialogue Designer* and the *Metatude Project Manager*. Consultants, managers and researchers can use these two applications to prepare questionnaires and manage projects involving stakeholder feedback.

1) Metatude Dialogue Server
The Metatude Dialogue Server (MDS) is the central component within the Metatude architecture. This server connects to databases and directories with stored stakeholder information, communicates with electronic channels, stores and serves dialogues and writes results to a database. All the project information and intelligence to manage projects automatically resides on this server.

2) Metatude Channel Integration Components
The Metatude Channel Integration Components (MCIC) needs to be installed on an electronic channel. This allows the channel to communicate with the central server.

3) Metatude Dialogue Designer
The Metatude Dialogue Designer (MDD) is a Windows application that is used to create questionnaires. With a simple and intuitive interface any user can learn how to create questionnaires in a matter of minutes. Many question types are supported, e.g. open questions, multiple choice, multiple response, scale and matrix questions.

4) Metatude Project Manager
With the Metatude Project Manager (MPM) you can manage stakeholder feedback projects. The MPM can connect via a network to the Metatude Dialogue Server. Once logged on you can connect databases and directories, create target groups, assign dialogues to (multiple) target groups and retrieve results in the desired format.

2   Installation

2.1   Domino

The following describes how to install your Domino server with an LDAP service. If you have already installed Domino, and just want to enable the LDAP service, please skip to the paragraph 'Set up Domino LDAP service'.

- Install Lotus Domino Server R5 and select the LDAP service during installation. Domino then adds the LDAP task to the NOTES.INI file by default.
- Restart your computer after the succesfull installation of Lotus Domino
- Start "Lotus Domino Administrator" from the programs section in your Windows start menu.
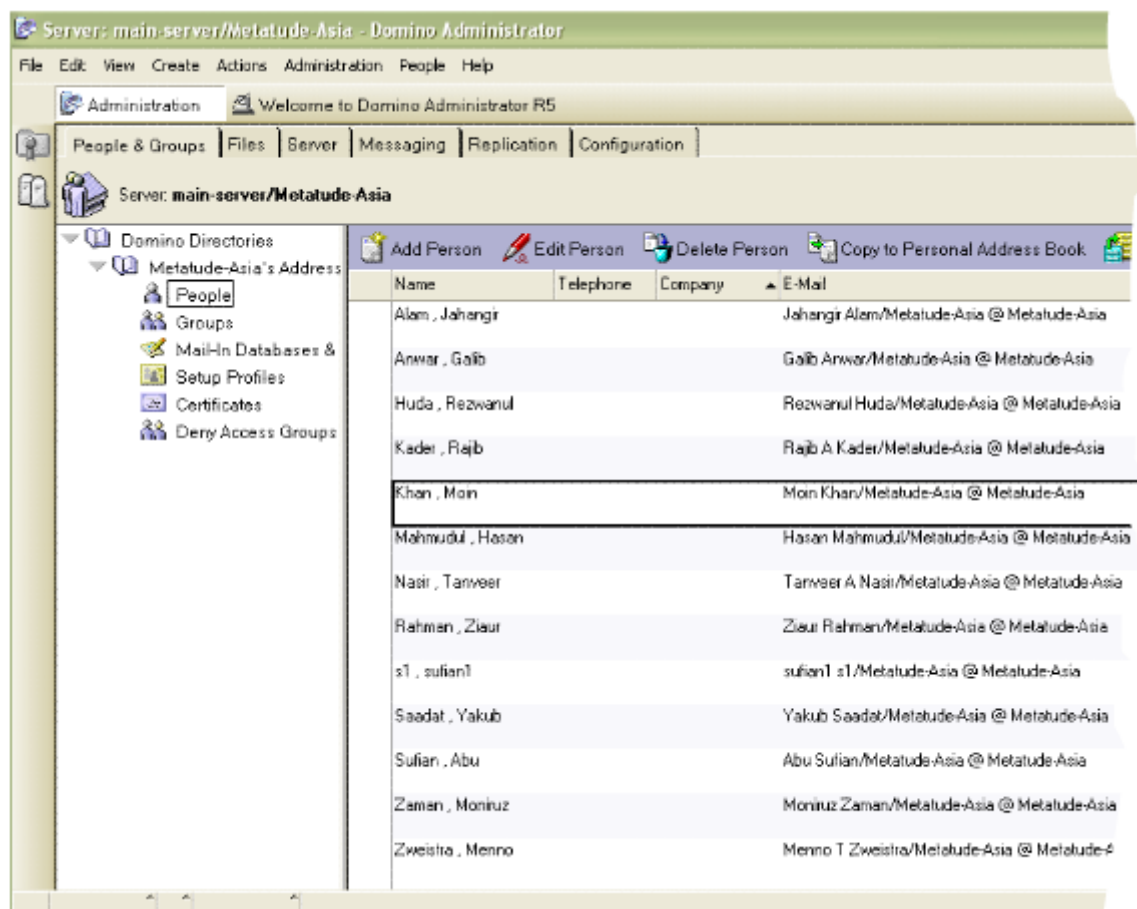- If the password window pops up, please provide a valid password.

Figure 1. Domino Administrator

- Then, you will see the Domino Administrator as shown in figure 1.
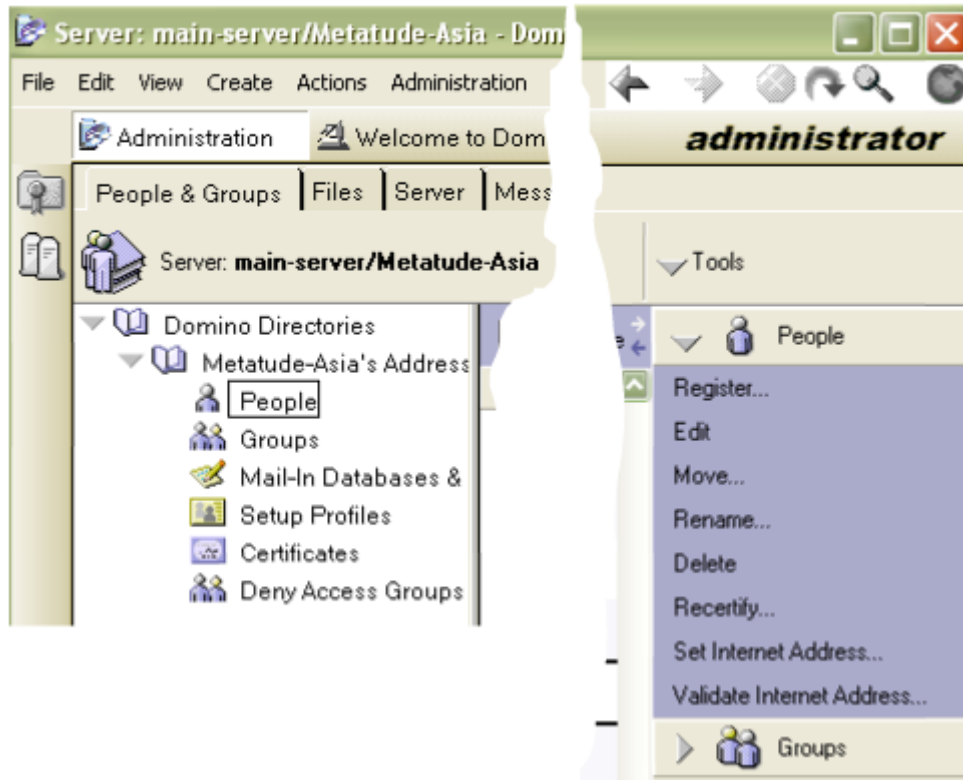
Figure 2. Create a new person.

- Select the "People & Groups" tab. Use the tree in the frame at the left side to navigate to "People". Then, create a new Person by using the "Register" option. This is shown in figure 2.
- Next, you will be asked for a valid Certifier Password to register the Person for your domain.
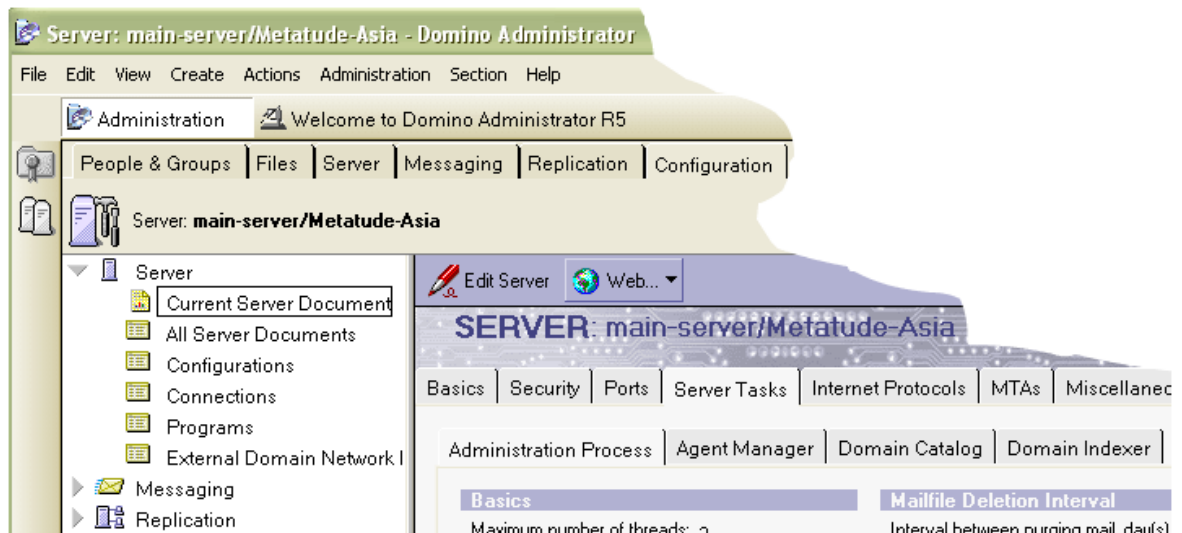- Add at least one more Person in order to get enough entries in your People section.

Figure 3. Server settings

- Now, select the "Current Server Document" from the "Configuration" tab. You will then see the server settings in the frame at the right side. See figure 3.
- Next, you can edit the LDAP port number. You do not have to change it, but you will need to write it down for future reference.

Figure 4. LDAP Port number

- Select the following sequence of tabs: **Ports > Internet Ports > Directory**. See figure 4. You can then see the TCP/IP port number for "Directory (LDAP)". You can change this to any available port on your computer. Check that the TCP/IP port status is set to "Enabled".
- Please write down the port number. This information is needed when you connect to the Domino server from the Metatude Project Manager.
- Save your settings to the Domino server by choosing "File > Save" from the menu bar.
- Restart your Domino server to activate the changes you made.

2.2   Configure MPM

- Open the Metatude Project manager. Log in with an user that has Administrator privileges. Click on the "Dir Servers" tab. Then click the "Add Server" button.
- Provide the information for the new directory server. See figure 5.

Figure 5. Add a directory server.

- Provide the host on which the Domino server is located. Also provide the port number that you have written down while configuring the Domino server. The default base is "c=us". Provide this base if you haven't changed it in the Domino server. Provide a username and password for connecting to the Domino server.

Figure 6. Domino attributes in the Metatude Project Manager

- Now, click on the "Attibutes" tab. After a while you will be able to see all the attributes available in the Domino server if you correctly filled out the previous information. If the Domino server is not reachable by the Metatude Dialogue server, or if the information you provided was incorrect, you will see an error message. Please check the error log file of the Metatude Dialogue Server to get more information on the error. It is located at Log/ErrorLog/error.txt inside the directory into which you installed the Metatude Dialogue Server.
- If the attributes show up as shown in figure 6 you've succesfully connected your Domino server to the Metatude software suite.

3 Reference

3.1 Domino LDAP Reference

Reference from Domino 5 Administration Help

(For more details information about Domino LDAP Service, please visit the Lotus Notes help guides.)

The Domino LDAP service

LDAP, or Lightweight Directory Access Protocol, is a protocol that uses TCP/IP to allow clients to access directory information. LDAP defines a standard way to search for and manage entries in a directory, where an entry is one or more groups of attributes that are associated with a distinguished name. A distinguished name -- for example, cn=Phyllis Spera,ou=Sales,ou=East,o=Acme -- is a name that uniquely identifies an entry within the directory tree. A directory can contain many types of entries -- for example, entries for users, groups, devices, and application data.
To enable the LDAP service on a server, you start the LDAP task on it. Clients that run the LDAP protocol and are set up to connect to the server -- for example, Notes Release 5 clients that have accounts for the server, Microsoft Outlook Express clients, and Netscape Communicator clients -- and LDAP-enabled applications can then query the Domino server to retrieve information about entries in the Domino Directory that meet specified criteria. For example, an LDAP client could retrieve e-mail addresses and phone numbers for all Person entries that have the last name Browning.

LDAP service features
The Domino LDAP service supports these features:
- LDAP v3 and v2
- Anonymous access to fields that you specify; name-and-password authentication, SSL and
- x.509 certificate authentication, Simple Authentication and Security Layer (SASL) protocol
- LDAP searches extended to secondary Domino directories
- LDAP client referrals to other LDAP directories
- LDAP searches of document text from databases configured in a Domain Catalog.
- Use of a third-party, LDAP-compliant server -- such as the Netscape Enterprise Web server -- to authenticate users that have passwords or x.509 certificates stored in the Domino Directory on a Domino server running the LDAP service. For information on setting up a third-party server to do this, see the documentation for the server.
- Use of LDAP clients to add, modify, and delete directory entries
- Schema publishing
- Schema checking
- Schema extension
- Searches based on alternate languages

Domino also supports these features that don't require the LDAP service:
- Command-line utility for searching LDAP directories
- Migration tool that lets you import entries from another LDAP directory and register the entries in Domino
- Although Domino Release 5 doesn't provide an LDAP API toolkit, you can use standard LDAP C, Java, and JNDI libraries available on the Internet to customize the Domino LDAP API.

3.2   Set up Domino LDAP service

Setting up the LDAP service

Before you set up the Domino LDAP service:
Make sure you understand TCP/IP concepts, including DNS host names and IP addressing.
Set up the Domino server, and set up security for the server.

1. To allow clients to connect to the LDAP service over the Internet, connect the server that runs the LDAP service to an Internet service provider (ISP) and register the server's DNS name and IP address with the ISP.
2. Create a full-text index for the replica of the Domino Directory on the server that runs the LDAP service. We strongly recommend creating a full-text index unless LDAP users search only for names.
3. Start the Domino server, and then start the LDAP task.
4. If your organization uses more than one Global Domain document, you must specify the one that the LDAP service uses to return users' Internet addresses to LDAP clients. Open the Global Domain document. In the "Use as default Global Domain" field, choose Yes.
5. Set up LDAP clients to connect to the LDAP service.
6. (Optional) Customize the default LDAP service configuration. In most cases, the LDAP service functions correctly when using the default settings.
7. To check whether you set up the LDAP service correctly, use an LDAP client or the ldapsearch utility to issue a query to the LDAP service.

Starting and stopping the LDAP service

To do this: Perform this task
Start the LDAP service automatically when you start Domino:
Edit the ServerTasks setting in the NOTES.INI file to include the LDAP task. Domino adds the LDAP task by default to the NOTES.INI file if you select the LDAP service during installation.

Start the LDAP service manually:
Enter **load LDAP** at the console.

Stop the LDAP service:
Enter **tell ldap quit** at the console.

Index

- A -

about　3

- C -

configuration　5, 8
connect　8

- D -

databases　4
directories　4
directory server　8
Domino　3, 5, 10, 11

- I -

install　3
installation　5, 8

- L -

LDAP　5, 8, 10, 11

- M -

Metatude Channel Integration Component　4
Metatude Dialogue Designer　4
Metatude Dialogue Server　4
Metatude Project Manager　4, 8

- R -

reference　10

- S -

service　11
setup　11
stakeholders　4

- T -

task　11