PeopleSoft 8.3 Directory Interface PeopleBook

PeopleSoft 8.3 Directory Interface PeopleBook

SKU HRMSr83DIX-B 1001

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

Chapter 3

Configuring PeopleSoft Directory Interface

Chapter 4

Using PeopleSoft Directory Interface

Chapter 5

Appendix A: PeopleSoft Directory Interface Reports

Index

About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www4.peoplesoft.com/cc

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet — From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft Internet site: http://www.peoplesoft.com.

Telephone — Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**

Email — Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	***Definition***
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	***Definition***
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	***Definition***
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	***Definition***
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

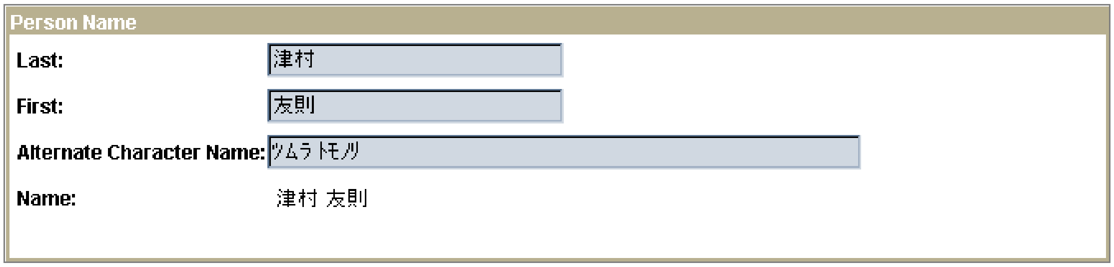
The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and **Name Prefix**	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). **Note.** You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. **Warning!** Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

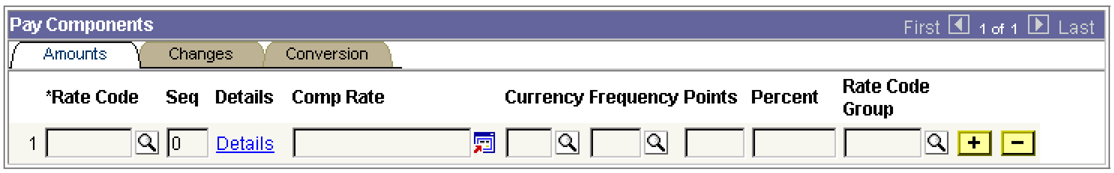
Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type Enter the house type, if applicable.

Postal Search Click **Postal Search** to use international address formats.

Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence) The sequence number of the rate code if it is used more than once.

Details Click the **Details** button to open the Comp Rate Code Secondary Panel page.

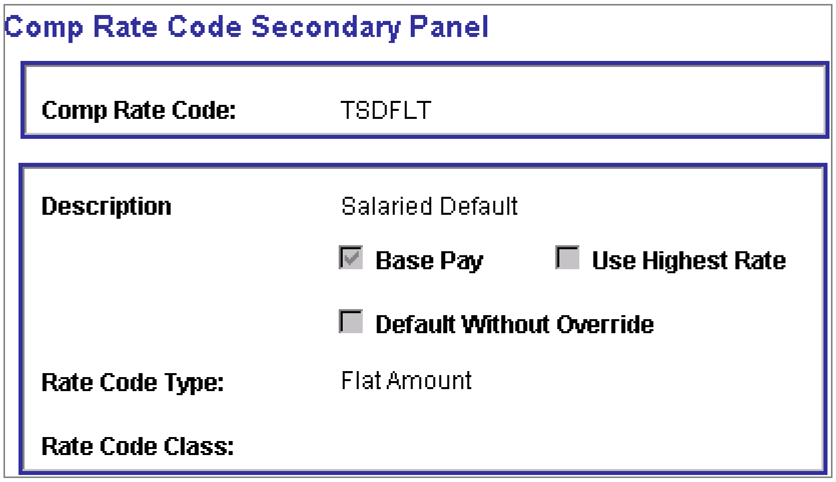
Comp Rate, (compensation rate) **Currency**, and **Frequency** The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.

Apply FTE If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.

Points The salary points associated with this rate code, if any.

Percent If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



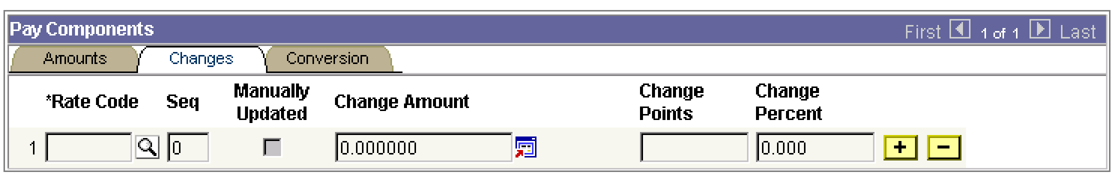
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

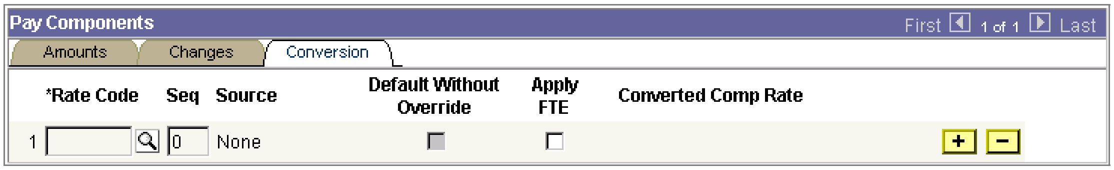
Changes Tab



Pay Components – Changes page

This page displays the change in an employee's salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Directory Interface PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft Directory Interface.

This preface explains how to use the documentation for PeopleSoft Directory Interface. General information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	***Definition***
(and **)**	Select the check boxes below the parentheses to group expressions.
And/Or	Select ***AND*** or ***OR*** to add another line to your rule. Select ***END*** to signify the end of the search. Select ***NONE*** if you aren't using this kind of filter.
Attribute Name or **Attribute**	Enter the name of the attribute whose data you want to filter.
Clear Search Filter	Click this button to delete all values from the **Search Filter** edit box and the **Build Filter** selections.
Default Connect DN or **Connect DN**	The connect DN is the ID that you can use to connect to the directory server.

Field	*Definition*
Directory ID	The directory ID identifies the directory connection. The directory ID that you enter can identify a specific LDAP server or a collection of LDAP servers depending on how many servers you add in the Server Name section.
Directory Object Class	An entry in the directory information tree. An object class is made up of attributes, which are mapped to PeopleSoft fields.
Directory Search Base or **Search Base**	The entry in the directory schema under which the system should search for information.
LDAP Server and **Port**	Identify a specific LDAP server. You can use the DNS name or you can use IP address dotted notation. For example, either of the following formats is acceptable: ldap12.yourcompany.com or 192.201.185.90. Enter the port number on which the LDAP server is configured to receive search requests. The standard LDAP port is 389. If you do not specify the correct port, PeopleSoft Directory Interface can't exchange data with your LDAP server.
Map Name	Name of the mapping that contains the data relationship details between PeopleSoft data and directory data.
Message Name	The application message that contains the PeopleSoft records and fields with the data that you want to associate with the attributes that make up the directory entry. For example, if you selected the ou = DEPTID object class, select the department (DSDEPT_SYNC) application message.
Modify Connect DN	Click to select one of the DNs specified on the Additional Connect DN's page.
Operation	Assign an operator to your rule such as **<, <=, <>, =, >,** or **>=.**
Refresh Search Filter	After you make changes using the **Build Filter** options, click this button to update the **Search Filter** edit box to reflect the changes.
Search Attributes **Directory Attribute**	Select the attribute or attributes that you want the query to search. Leave blank to search all attributes.
Search Base	The search base is the entry in the directory information tree at which the search begins querying.
Search Filter	You can narrow the search (for example, instruct the system to search for all attributes but one) by entering a search filter. Enter the search filter using standard LDAP (Lightweight Directory Access Protocol) protocol. See your directory documentation for information about LDAP protocol.

Field	***Definition***
Search Scope	Select the search scope: ***Base:*** Searches only the value in the **Search Base** field. ***One:*** Searches only the entries one level down from the value in the **Search Base** field. ***Sub:*** Searches the value in the **Search Base** field and all entries beneath it.
Value	Enter an attribute value.

CHAPTER 2

Introduction to PeopleSoft Directory Interface

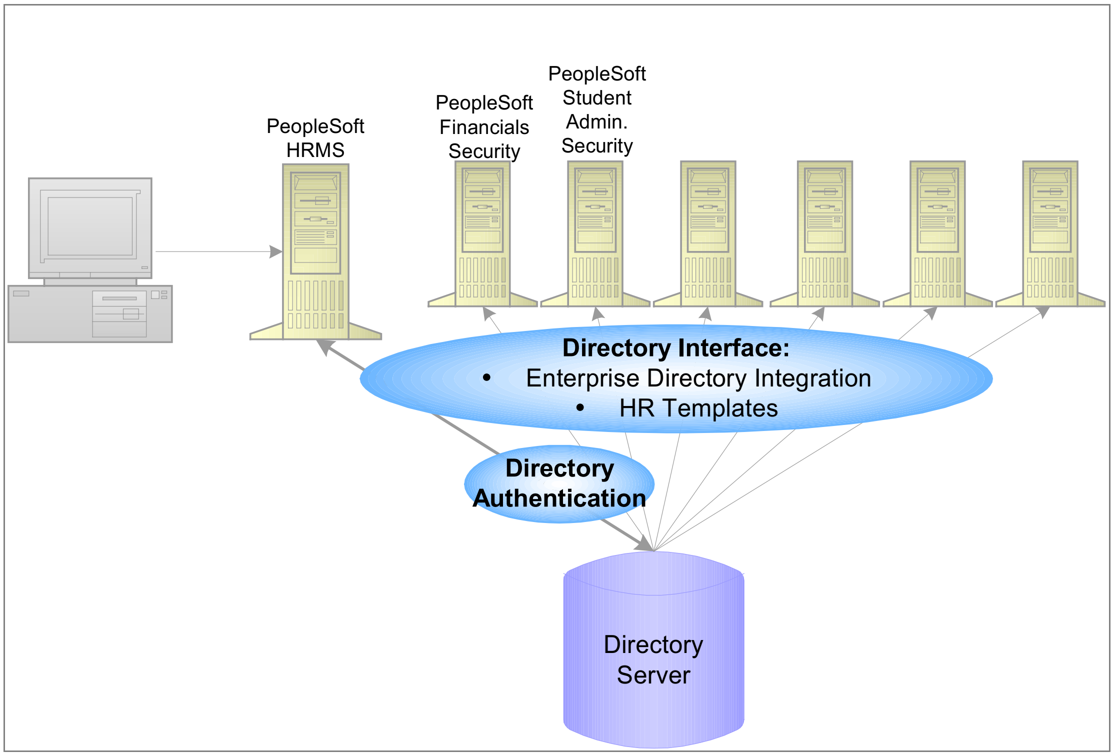
This chapter provides an overview of PeopleSoft Directory Interface and product requirements for using it and discusses how to share PeopleSoft information with your directory.

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HRMS database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and data maintenance.

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface builds on LDAP integration delivered with PeopleTools 8.1, which enables PeopleSoft applications to authenticate users against preexisting authentication data in an LDAP directory service. The data in the directory needs to be maintained separately from the user data maintained in the PeopleSoft HRMS database.

PeopleSoft Directory Interface enables you to take advantage of the user information maintained in the PeopleSoft HRMS database. You can select data in PeopleSoft HRMS to make available to the directory while maintaining that data in the PeopleSoft system; you don't have to maintain information in two places. Using the mapping information that you set up, PeopleSoft Directory Interface maps the data that you select in PeopleSoft HRMS to your directory information tree. When information changes in the PeopleSoft database, PeopleSoft Directory Interface captures that information and instantaneously updates the directory server or writes it to a file for later application. PeopleSoft Directory Interface makes the PeopleSoft HRMS user information available to all your LDAP-enabled enterprise applications.



PeopleSoft Directory Interface provides enhanced directory integration that builds on the directory authentication functionality delivered with PeopleTools

---

Warning! PeopleSoft strongly recommends having a good understanding of directories and your directory documentation before you install PeopleSoft Directory Interface. PeopleSoft Directory Interface documentation doesn't replace your directory documentation.

Overview of Product Requirements

This section outlines items that PeopleSoft assumes are in place before PeopleSoft Directory Interface installation.

Note. For current requirements of our LDAP support, check the PeopleSoft Platforms Database on Customer Connection or the current *PeopleSoft Hardware and Software Requirements* guide.

Software

PeopleSoft supports the following LDAP-enabled directory servers:

- Novell NDS eDirectory V 8.5 or better.

- iPlanet Directory Server V 4.11 or better.

Before installing PeopleSoft Directory Interface, you must have at least one directory server installed and configured at your site. If you don't have a directory server installed at your site, PeopleSoft provides you with Novell NDS eDirectory, which is bundled with PeopleTools.

Note. If you didn't receive Novell NDS eDirectory bundled with PeopleTools, you can obtain eDirectory V8.5 from http://www.novell.com/downloads.

Note. If you're using the Novell eDirectory, PeopleSoft requires use of version 8 (with 8.3 patch) or 8.5, so that the schema extensions are available online in the PeopleSoft database through PeopleSoft Business Interlinks.

Hardware

PeopleSoft recommends that you consult the documentation that's delivered with your LDAP directory server for hardware requirements for your site-specific needs.

Expertise

PeopleSoft assumes that if you're responsible for implementing PeopleSoft Directory Interface, you have expert knowledge in the following areas:

- LDAP.

  PeopleSoft documents LDAP features and functionality relating to a PeopleSoft Directory Interface implementation. We expect that you have expert knowledge of your directory server platform.

- PeopleSoft Application Messaging.

  This document assumes working knowledge of application messaging design and administration.

- PeopleSoft Business Interlinks.

  This document assumes working knowledge of PeopleSoft Business Interlinks design and administration.

Directory Setup

Your directory setup must meet the following criteria:

- The registry key HKLM\System\CurrentControlSet\Services\NTDS\Parameters\Schema Update Allowed must be present and set to a nonzero DWORD on the Active Directory FSMO Role Owner.

- When creating structural objectClasses in Active Directory, it's necessary to specify "containment."

  So psftJobs can be children of only these object classes: builtinDomain, organizationalUnit, and domainDNS.

- You must add the server names in the Directory Setup component as they appear on the dNSHost Name attribute on the server entries under the CN=Sites entry.

Recommendations

PeopleSoft recommends considering these methods or guidelines for best results:

- You must be able to ping by hostname all servers in the directory from the application server.

  Some LDAP searches generate LDAP referrals to other servers participating in your directory. If any server is unreachable by hostname from the application server, you can add a line for the server to ping the application server's hosts file.

- In the directory, configure the entry limit value to exceed the number of rows that you expect to be returned.

  The default value usually isn't sufficient.

- To set up a demo environment using PeopleSoft Directory Interface demo data, use the Novell eDirectory.

- Regarding your PeopleSoft Application Messaging configuration, PeopleSoft recommends that all application messages related to your PeopleSoft Directory Server configuration flow through the same message channel.

  PeopleSoft recommends creation of a dedicated message channel for PeopleSoft Directory Interface messages to ensure that if any message fails, subsequent messages remain queued in sequence after it.

- PeopleSoft assumes that your directory information tree has the user entries at the leaf level.

  This is required when an entry needs moving between branches. It needs to be at the leaf level so that the system can read various user attributes, including the password.

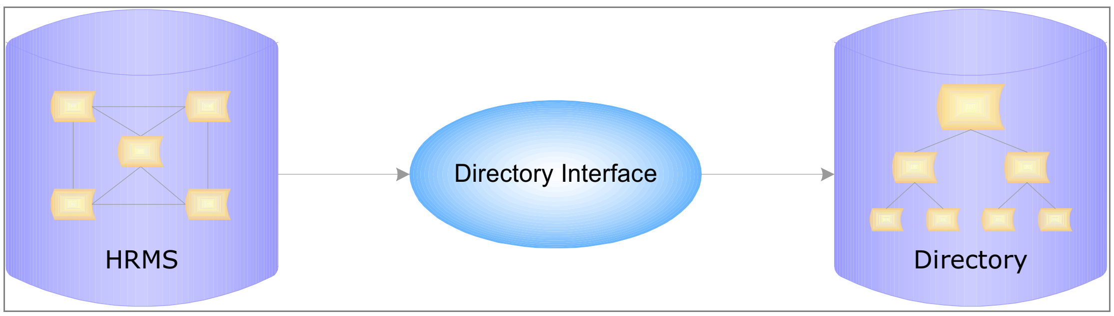
- PeopleSoft strongly recommends that when constructing distinguished names in your directory, you use only PeopleSoft code values for relative distinguished names (RDNs).

PeopleSoft code values are unlikely to change. PeopleSoft recommends not using a description value as an RDN, because descriptions are more likely to change and many are long, posing issues for searching.

Sharing PeopleSoft Information With Your Directory

In this section, we discuss how to get information from PeopleSoft tables to your directory.

Because your PeopleSoft system is a relational database and your directory has a hierarchical model, you must indicate how information in selected PeopleSoft tables corresponds to entries in the directory to get information from PeopleSoft to a directory. Using mapping pages in PeopleSoft Directory Interface, you indicate the relationship between the PeopleSoft objects and the directory objects; when PeopleSoft Directory Interface receives user data from the PeopleSoft database, it can map data objects to corresponding objects in the directory.

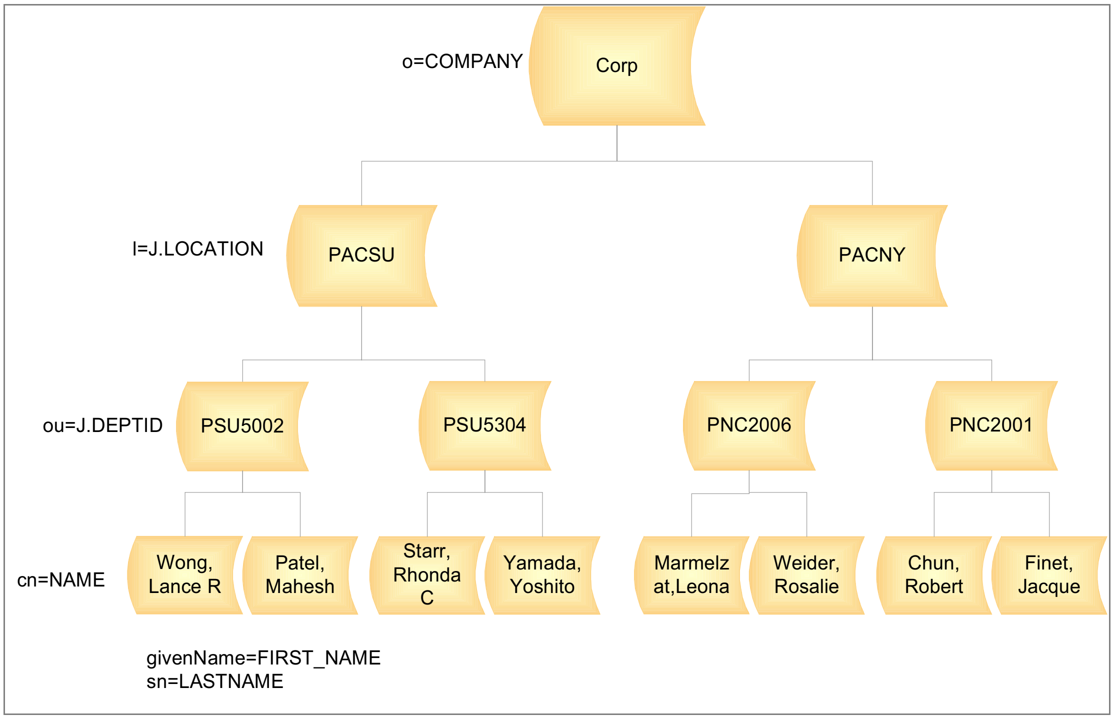


Directory Interface maps data from PeopleSoft's relational database to the hierarchical directory structure

Getting Data From PeopleSoft to the Directory

For PeopleSoft Directory Interface to map PeopleSoft information to your directory, it needs information about the hierarchical structure, the *directory information tree,* that you've set up in your directory.

The directory information tree is the hierarchical relationship among the entries that constitute your directory database. Entries include a *distinguished name* and *attributes/value* pairs. The distinguished name identifies an entry's position in the tree, and the attributes hold data that comprises the entry. Besides uniquely identifying a person in the directory database, the distinguished name of the NAME entry indicates that it's below J.DEPTID on the information tree, as shown below. The entry's attributes and values tell us more about the person, such as their phone number or job title, beyond unique identifying information. The information the attributes contain depend upon what you set up in the Directory Mapping pages.



Entries in a directory database are organized hierarchically

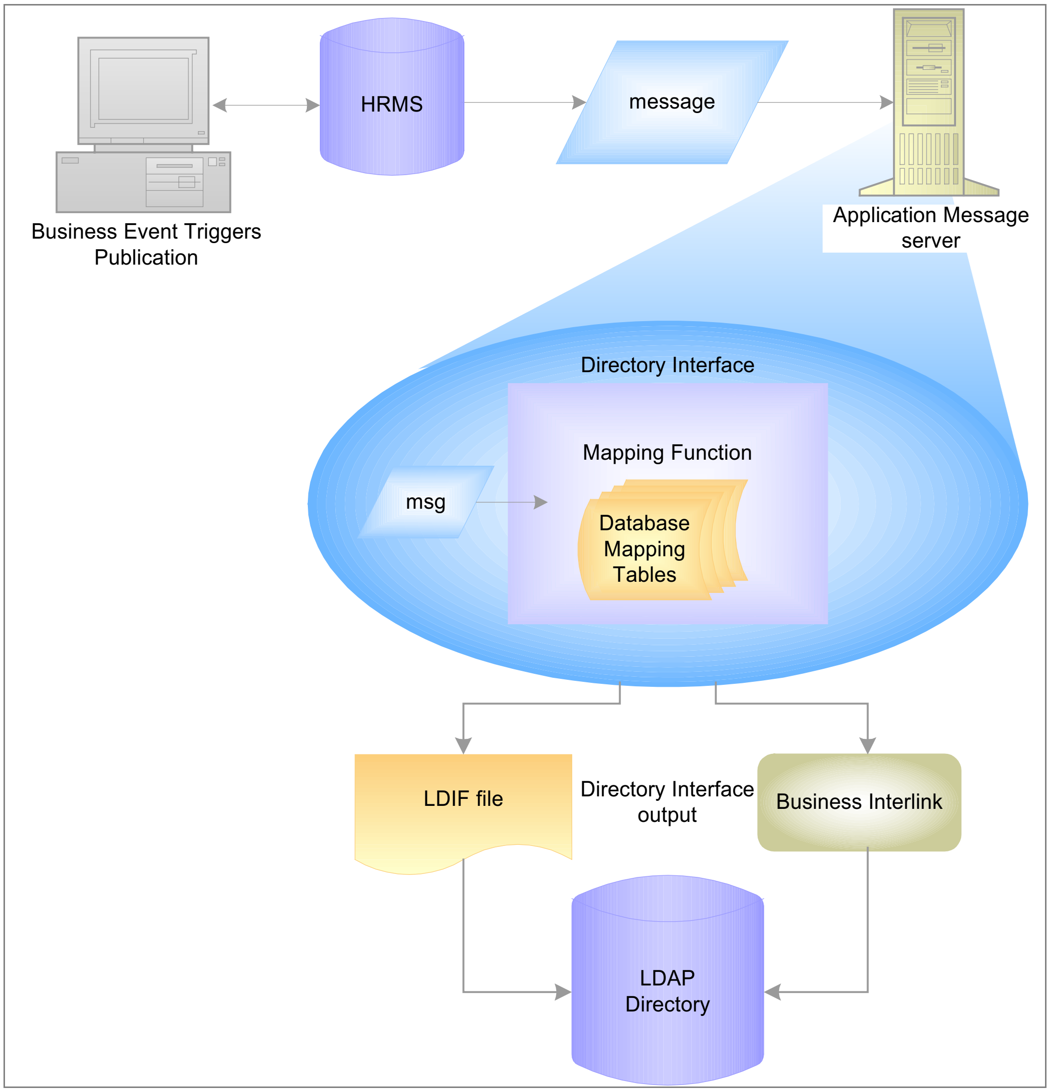
Attributes that are available for a particular type of entry, called an Object Class, are specified in the directory *schema*. You must load the schema into the directory interface before mapping PeopleSoft data to the directory.

Use PeopleSoft Directory Interface mapping tables to map attributes to application messages. Each application message contains information about a PeopleSoft record and its fields.

For each mapping, select one or more object classes (to identify the types of entries that are relevant to the map) and an associated message. Map the attributes, linking PeopleSoft fields to the attributes that are available for the chosen object class. Whenever data in the fields in that message change, PeopleSoft Directory Interface can update the corresponding data in the object class in the directory. For example, map the J.LOCATION object class to the LOCATION message and the location fields to the appropriate attributes so that PeopleSoft Directory Interface can update the directory's J.LOCATION object class whenever information in the Location record changes in PeopleSoft.

After loading PeopleSoft data into your directory, you can keep the directory data up-to-date with PeopleSoft Business Interlinks or LDAP Data Interchange Format (LDIF) files. PeopleSoft Business Interlinks update the data in real time so that your directory information is always in sync with PeopleSoft. You can load LDIF files at user-defined intervals.

As the diagram shows, when you save record changes, the system sends an application message to the application server. PeopleSoft Directory Interface's mapping function, running on the application message server, maps PeopleSoft field data in the message to the directory's attributes. After the information is mapped, PeopleSoft Directory Interface updates the directory with the PeopleSoft information (using PeopleSoft Business Interlinks) or writes the information to an LDIF file, depending on what's specified in the mapping tables.



PeopleSoft Directory Interface maps information in the message using the mapping tables and updates the directory

CHAPTER 3

Configuring PeopleSoft Directory Interface

This chapter discusses how to:

- Configure the directory.
- Load the schema cache.
- Set up directory mappings.
- Set up directory authentication mapping.
- Set up the user profile mapping.
- Set up role membership options.
- Load PeopleSoft data into the directory.

Before you perform the steps in this chapter, install PeopleSoft Directory Interface.

Configuring a Directory

In this section, we discuss how to:

- Specify Lightweight Directory Access Protocol (LDAP) directory server network information.
- Add connect distinguished names (DNs).
- Install schema extensions in your directory.
- Test DNs and search criteria.

Use the Configure Directory component to specify connection information and test directory server connections.

To enable your PeopleSoft system to connect to your directory server, enter the appropriate connection information, including the server name (DNS or IP address) and the listening port number. Enter the user DN and associated password.

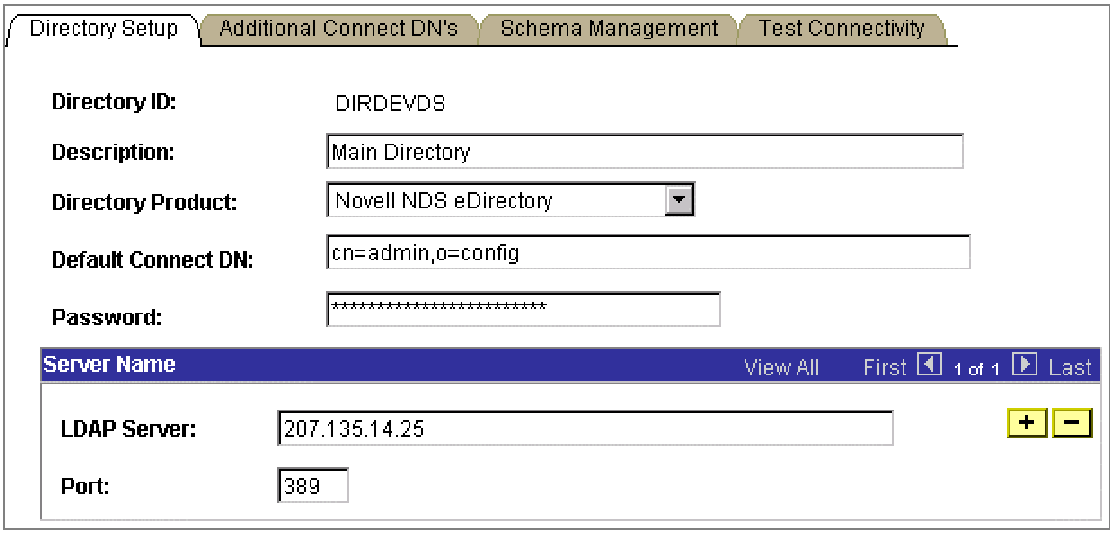
The PeopleSoft application server uses the user DN and password to connect to the LDAP server to retrieve user profile information about users signing into the system. The user DN must reflect a user with the appropriate LDAP browse rights.

Pages Used to Configure a Directory

Page Name	***Object Name***	***Navigation***	***Usage***
Directory Setup	DSDIRSETUP	Directory Interface, Manage Directory, Setup, Configure Directory, Directory Setup	Specify the network information, such as sign-in IDs and passwords, of LDAP directory servers. LDAP servers that you're incorporating into your PeopleSoft Directory Interface implementation must be installed, configured, and functional.
Additional Connect DN's	DSSERVERID	Directory Interface, Manage Directory, Setup, Configure Directory, Additional Connect DN's	Specify connect DNs besides the default connect DN specified on the Directory Setup page.
Schema Management	DSEXTINSTALL	Directory Interface, Manage Directory, Setup, Configure Directory, Schema Management	Install PeopleSoft-specific schema extensions in your directory.
Test Connectivity	DSSRCHRSLT	Directory Interface, Manage Directory, Setup, Configure Directory, Test Connectivity	Test DNs and search criteria that you entered elsewhere in the Configure Directory component and view the results. The system tests connectivity when you access this page.

Specifying LDAP Directory Server Network Information

Access the Directory Setup page.



Directory Setup page

Directory Product Select from the list.

Password Enter the password associated with the directory-based account that appears in the **Default Connect DN** field.

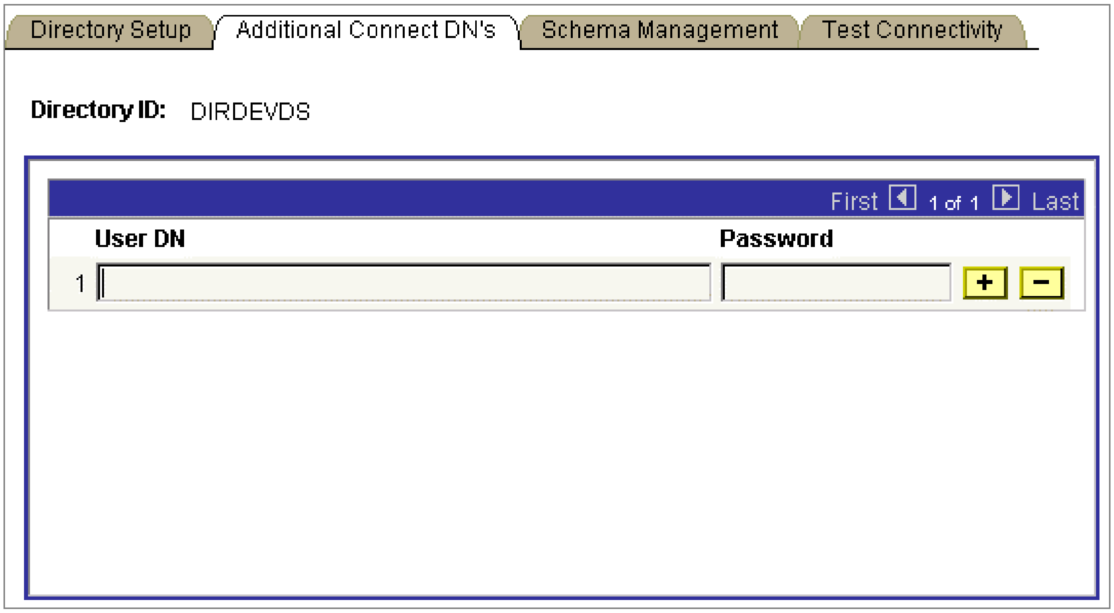
Note. The password is stored in encrypted form in the database; not even those with administrative access to the database can view the password.

Server Name

Add LDAP directory servers to a connection list. You can add multiple servers for failover purposes.

Adding Connect DNs

Access the Additional Connect DN's page.

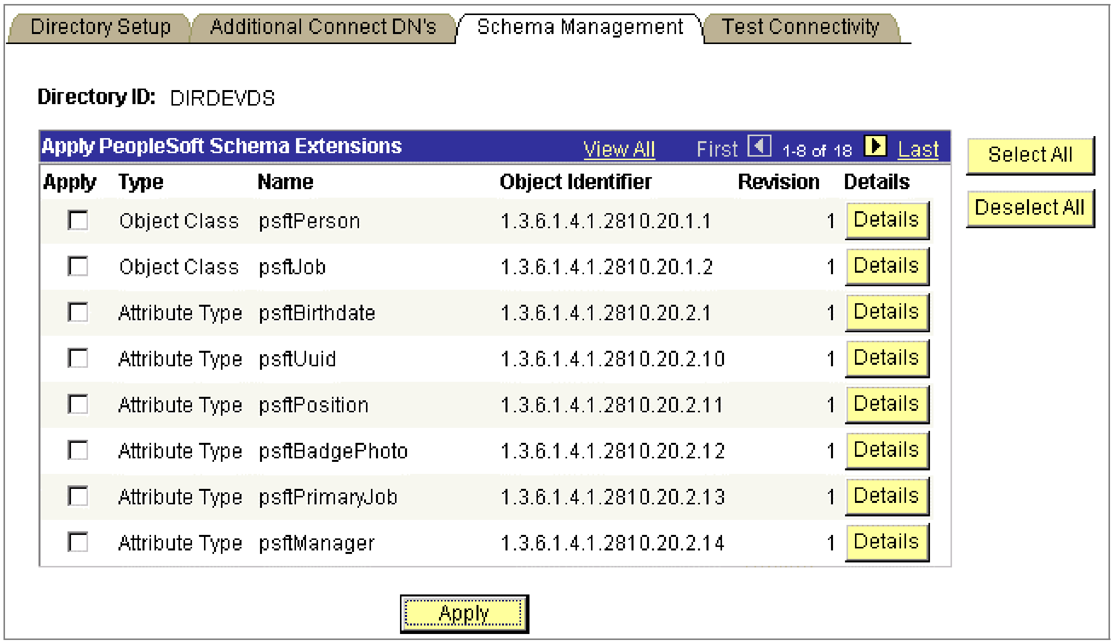


Additional Connect DN's page

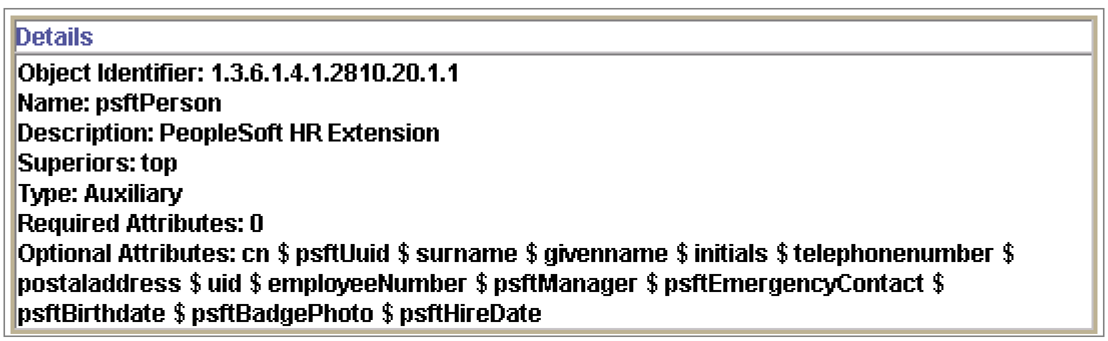
User DN	Add DNs besides the default connect DN that you entered on the Directory Setup page. The default user ID is probably an administrative ID. Enables you to set up a more secure user ID for the scope of mapping.
Password	Add the password for each additional DN that you enter.

Managing Schemas

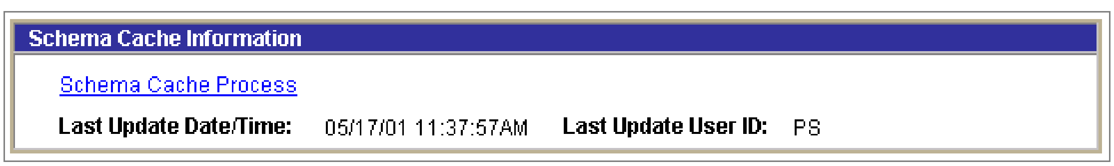
Access the Schema Management page.



Schema Management page (1 of 3)



Schema Management page (2 of 3)



Schema Management page (3 of 3)

Apply	Select to apply the selected schema extension type to your directory.
Type	Displays the type of schema extension: ***Object Class*** or ***Attribute Type.***
Name	Displays the schema extension name.

Object Identifier	Displays the schema extension object identifier. The sequence ***1.3.6.1.4.1.2810.20*** identifies the object as a PeopleSoft object. The second-to-last number is ***1*** or ***2***. ***1*** indicates an object class type; ***2*** indicates an attribute type. The last number indicates the sequence of the extension's creation.
Revision	Displays how many times the schema extension was revised.
Details	Click to display details about the selected schema extension in the **Details** region at the bottom of the page.
Select All	Click to select all the schema extensions to apply to your directory.
Deselect All	Click to deselect every schema extension.
Apply	Click to apply the selected schema extensions to your directory.

Details

When you click a schema extension's **Details** button, the system displays the details of that extension. Besides the object identifier and name, the "Superiors" detail, indicating any extensions that are higher in the hierarchy, is of interest. The "Type" detail indicates whether the schema extension is mandatory, optional, or auxiliary.

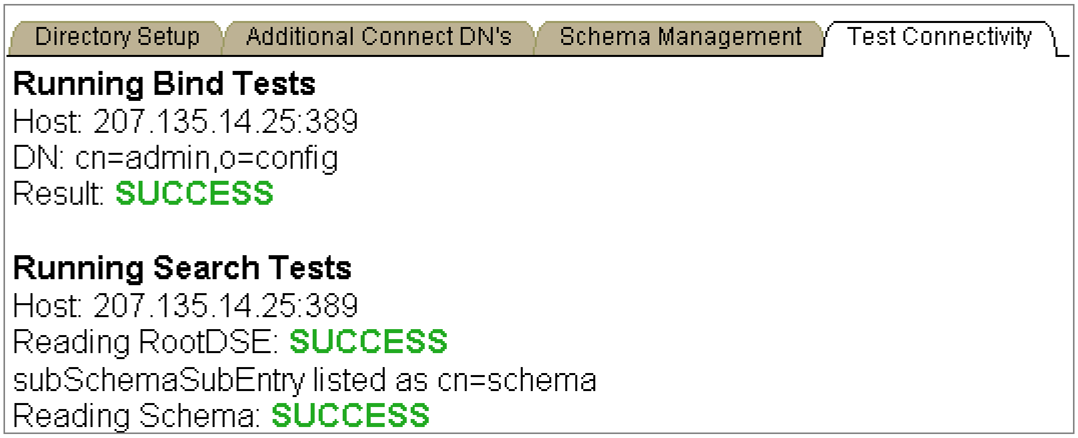
Schema Cache Information

Displays the last time the Schema Cache process was run and by whom.

Note. You can click the **Schema Cache Process** link to transfer to the Schema Cache page to invoke the Schema Cache process.

Testing Distinguished Names and Search Criteria

Access the Test Connectivity page.



Test Connectivity page

The page displays the results (***PASS*** or ***FAIL***) of the connectivity test. If connectivity fails, modify the connect information on the Directory Setup and Additional Connect DN's pages.

Loading the Schema Cache

In this section, we discuss how to use the schema cache process to load your directory's schema cache into PeopleSoft Directory Interface.

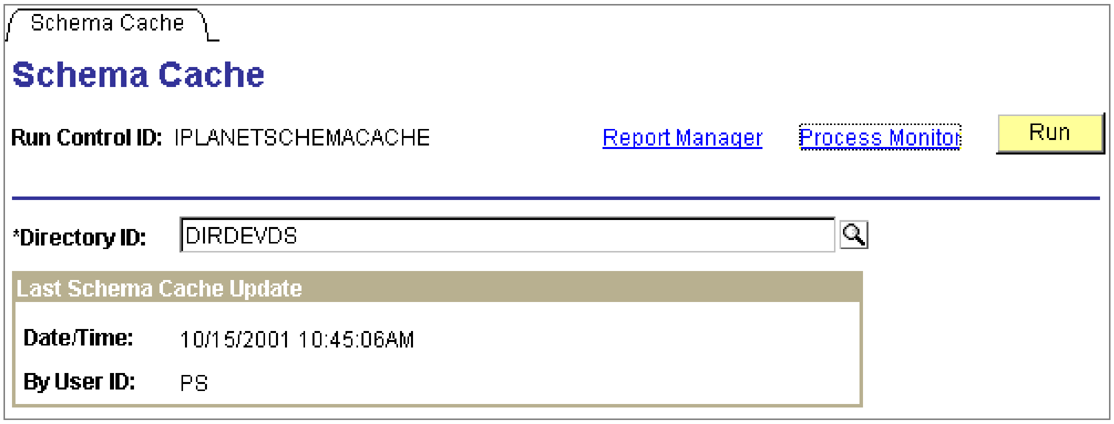
The schema includes information such as object classes, attributes, and the relationship between them.

Page Used to Load the Schema Cache

Page Name	***Object Name***	***Navigation***	***Usage***
Schema Cache	RUN_DSSCHEMA	Directory Interface, Manage Directory, Process, Schema Cache	Load the schema cache from your directory into PeopleSoft Directory Interface.

Loading the Schema Cache Into PeopleSoft Directory Interface

Access the Schema Cache page.



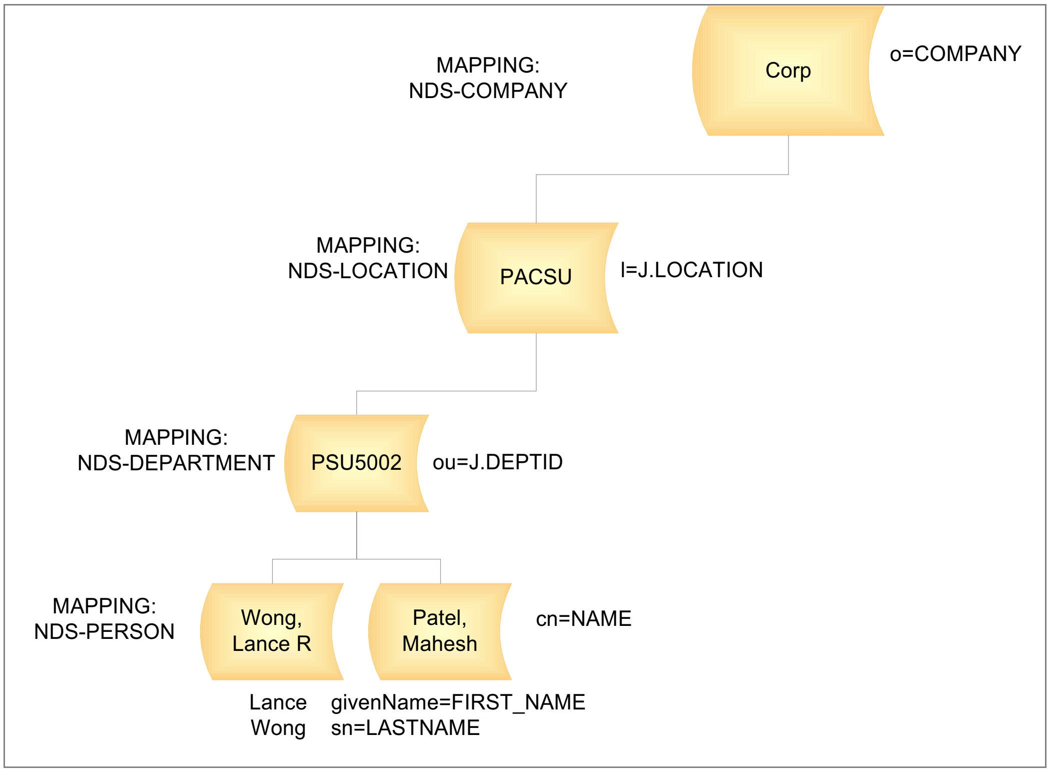
Schema Cache page

Last Update Date/Time and **Last Update User ID**	Displays when the schema cache process was last run for this directory ID and who ran the process.

Setting Up Directory Mappings

PeopleSoft Directory Interface receives PeopleSoft data from application messages published whenever a business event is associated with the messages identified in the Directory Mapping component. Each message contains records and fields and the most recent data for those fields. Using the mapping information that you set up in the Directory Mapping component, PeopleSoft Directory Interface associates the fields in the message with the attributes in the directory and updates the data in the directory attributes with the field data from the message.

Create a mapping for every directory entry that you're populating with PeopleSoft data. For example, in this sample directory information tree, you'd create four mappings: company, location, department, and person.



Entry mappings in relation to the directory information tree

The Directory Mapping component contains three pages:

On the Map Details page, enter information about the mapping that you're setting up, such as the directory ID and the directory object for the entry to which it's mapping and the PeopleSoft message containing the records and fields to map from.

On the DN Details page, associate the data in the message that you selected on the Map Details page with the entry's DN. Build an entry's DN by applying the attributes in sequential order. The order for the department entry in our example would be constructed with the data in the following table:

Sequence Number	***Directory Attribute***	***Attribute Sequence Number***	***Use Constant Value***	***Record (Table) Name***	***Field Name***	***Constant Value***
1	o	1	Yes			Corp
2	l	1	No	LOCATION	LOCATION	
3	ou	1	No	DEPT_TBL	DEPTID	

On the Attribute Details page, associate the fields in the message that you selected on the Map Details page with attributes that provide details about an entry. Some attributes are mandatory, as defined in the directory schema, and must be mapped to a constant value or record/field. You can add attributes in the Attribute field in the Optional group box. In our example, you'd map PeopleSoft records and fields to the mandatory attributes (such as

DeptID), and you could add attributes, such as Description, to get more information about the object class.

Note. The system doesn't update related-display field values unless the source field is mapped. If the source field isn't mapped, the audit process still indicates any discrepancies and enables you to update them. For example, when you map to an employee's job code, the directory entry includes the job code description. If you change the job code description in the Job Code component, the system updates the related-display description field on the employee's Job Data page but doesn't update to the directory, because it isn't included in the mapping.

Common Elements Used in the Directory Mapping Component

Field	***Definition***
Seq and **Attribute**	On the DN Details page, select the directory attributes associated with the mapping's DN and enter the sequence in which the directory should use the attribute to build the entry's DN. For example, for the Department entry, the following attributes should have this sequence: • ***1***, ***o*** (Corporation) • ***2***, ***l*** (Location) • ***3***, ***ou*** (Department) On the Attribute Details page, the system displays the mandatory attributes; you can select the optional attributes. Enter the sequence in which the system should use the attributes.
Attr Seq No (attribute sequence number)	The system-assigned attribute sequence number distinguishes between attribute values and tells PeopleSoft Directory Interface the order in which to assign the PeopleSoft and constant values to the attribute.
Use Const (use constant)	Select to tell the system to use the constant value that you enter in the **Const Value** field, not a PeopleSoft field value, to populate this attribute.
Record and **Field Name**	Select the record and the field in the record that contains the value that the system is to use to populate this attribute.

Sample Mappings

PeopleSoft delivers several sample mappings. After establishing directory IDs in the Directory Configuration component, add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

Setting Up PeopleCode Attribute-Level Functions

When the mapping function executes the values in the selected field, the field value is passed into a PeopleCode function as a parameter and the output is assigned to the attribute in the directory.

Before you can enter a function on this page in the PeopleCode Function Name field, you must set up the function in the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula.

To create a function:

1. Open the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula.

2. Add a section in DSDynamicAttrFunc.

3. In the Evaluate statement, add the following section for each function being added (FuncX equals your function name):

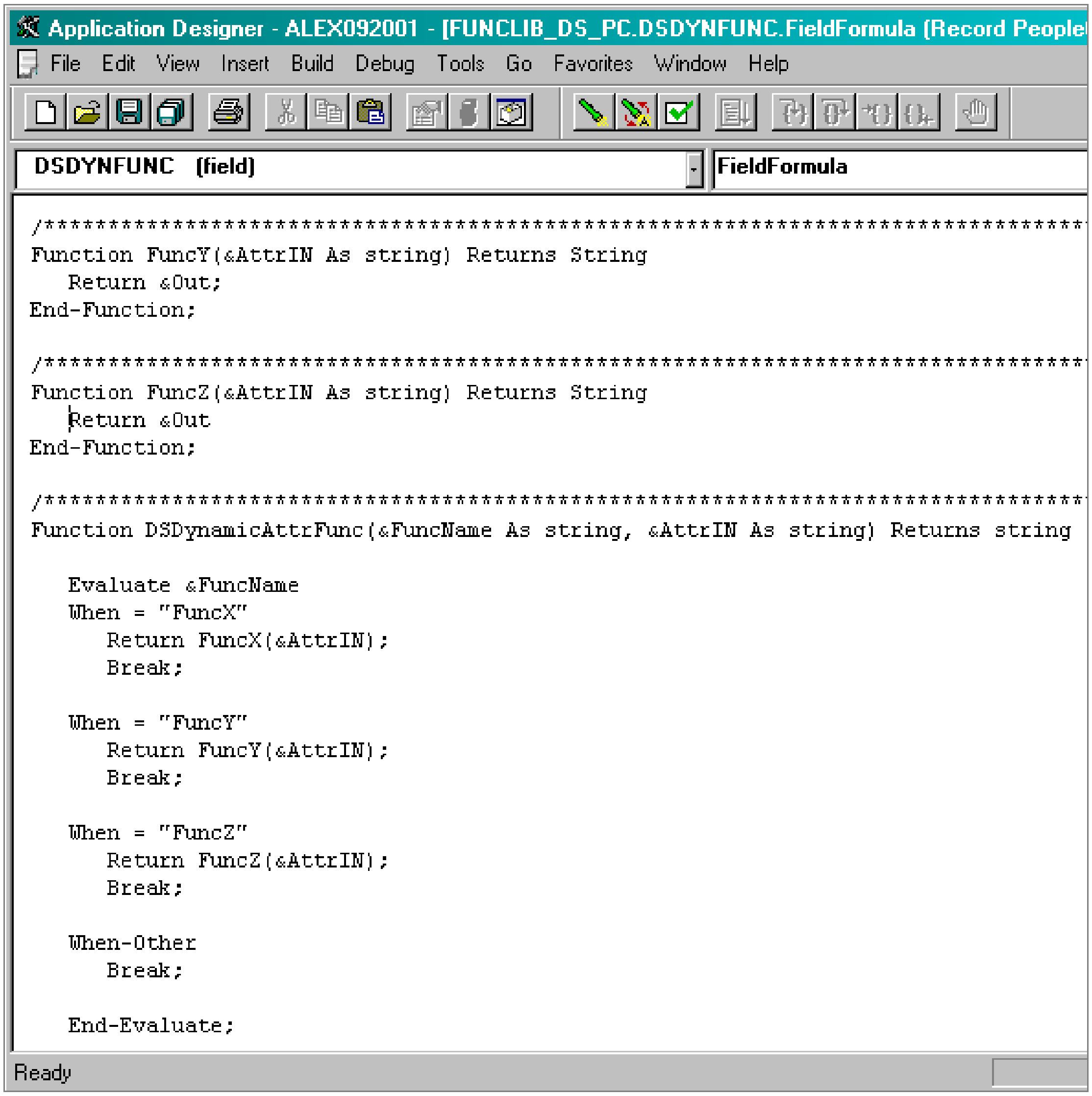
   When = 'FuncX'

      Return FuncX(&AttrIn);

      Break;

4. Define a DSDynamicAttrFunc PeopleCode function. The parameter list must contain one parameter, an attribute type string input, as shown below. The function must return the value the system will insert in the attribute the Record.Field is mapped to.

   This exhibit displays the setup for functions FuncX, FuncY, and FuncZ:



Set up functions on the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula

See Also

PeopleTools PeopleBook: PeopleCode Developer's Guide, PeopleCode Language, Functions

Delivered Messages

The following sections describe delivered sample messages and PeopleCode functions that are related to your directory mappings.

Directory Interface Messages

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Message Name	***Directory Entry***
DSLocation	Location Entry
DSDept_tbl	Department Entry
DSWorkforce_Sync	Job Entry
DSPerson_Basic_Sync	Person Entry

See Also

PeopleTools PeopleBook: *Integration Tools*, “Application Messaging”

Message Publish

The following example is Publish PeopleCode used in SavePostChange PeopleCode in a component:

```
Local Message &MSG;
Local Rowset &COMPONENTROWSET;

&COMPONENTROWSET = GetLevel0();
&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);
&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);
&MSG.Publish();
```

Note. When publishing mapping data, use CopyRowsetDeltaOriginal, not CopyRowsetDelta.

Message Subscription

The following example shows subscription PeopleCode in a message:

```
Declare Function ProcessMappingMessage PeopleCode FUNCLIB_DS_PC.DSMAPMESSAGE
FieldFormula;
Local Message &msgIn;

/* Build the Mapping messages from the input message */
&msgIn = GetMessage();
ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");
```

DSMAPINPUT Message

The DSMAPINPUT message, which corresponds to Directory Input, is a sample message that combines information from an employee's job and personal data into one message. The DSWORKFORCE_SYNC message publishes an employee's job information. The DSPERSON_BASIC_SYNC message publishes an employee's personal information.

In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the message is passed as input into the BuildMappingMessage, which populates the

DSMAPINPUT message with the employee's job and personal data. This enables you to map job and personal data for one message to one directory entry.

BuildMappingMessage

Syntax

```
BuildMappingMessage(input message, output message, on-line flag, [, map name])
```

Description

The BuildMappingMessage populates a message with data stored in another message and in the local database. After populating the message from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the originally published message, use this function instead of directly calling the mapping function.

The function performs the following tasks:

- Copies data in the same record from the input message into the output message.
- Searches for empty records in the output message.
- Examines data in the message for key values for empty records.
- If it finds key values for empty records, populates empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for this provided name. Otherwise, calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is in the FUNCLIB_DS_PC derived record, DSMAPMESSAGE field, Field Formula event.

Parameters

Name	**Type**	**Description**
input message	Message	Pass the message containing the originally published data.
output message	String	Specify the name of the message to be created, filled up and passed to the mapping function.
online flag	Boolean	Set to true if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function but is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

Example

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

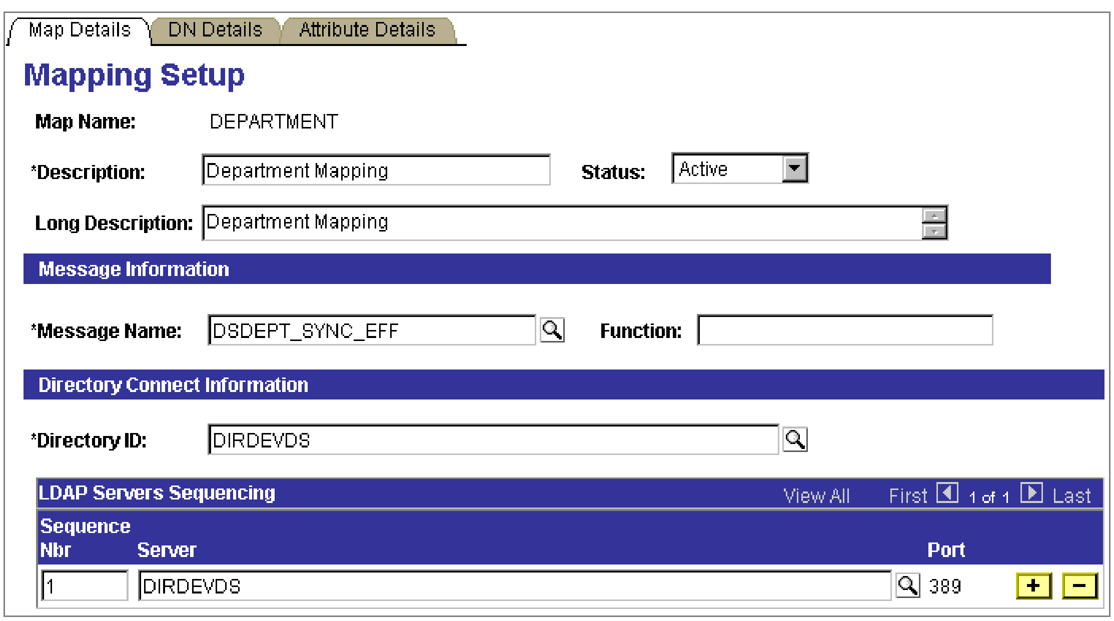
Pages Used to Set Up Directory Mappings

Page Name	***Object Name***	***Navigation***	***Usage***
Map Details	DSMAP	Directory Interface, Manage Directory, Use, Directory Mapping, Map Details	Set up a mapping. Enter the Directory ID and specify the basic mapping information.
Map Details - Modify Connect DN	DSUSERDN	Directory Interface, Manage Directory, Use, Directory Mapping, Map Details Click the Modify Connect DN button.	Change the connect DN.
DN Details	DSDN	Directory Interface, Manage Directory, Use, Directory Mapping, DN Details	Set up the relationship between the data contained in the message that you selected on the Message Details page and the directory entry's DN. The attributes that constitute the DN indicate the entry's location in the directory. You can map attributes to a field value contained in the message or a constant value that you specify here.
DN Details - Translate Table	DSDN_XLAT	Directory Interface, Manage Directory, Use, Directory Mapping, DN Details Click the  button.	Translate database values. Instruct the system to perform functions with database values.

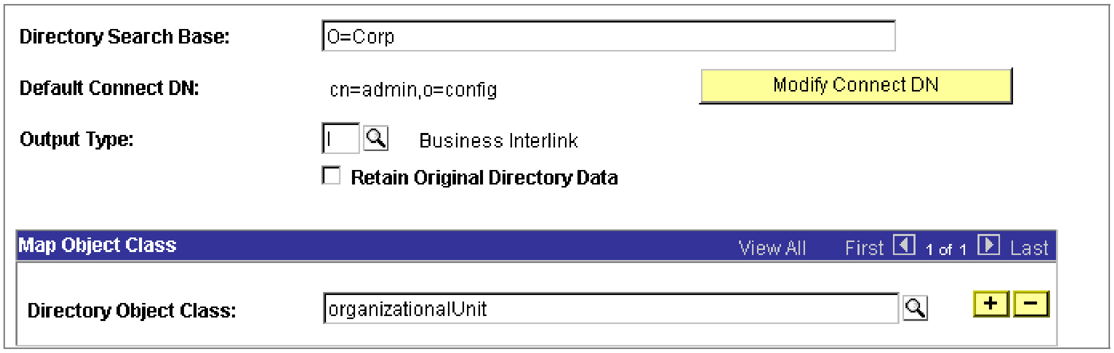
Page Name	***Object Name***	***Navigation***	***Usage***
Attribute Details	DSATTRIB	Directory Interface, Manage Directory, Use, Directory Mapping, Attribute Details	Set up the relationship between the data in the application message that you selected on the Message Details page and the directory object class's attributes. The attributes that you map here provide information about the object class. You can map the attributes to a field value contained in the message or to a constant value that you specify here.
Attribute Details – Translate Table	DSREQATTRIB_XLAT	Directory Interface, Manage Directory, Use, Directory Mapping, Attribute Details Click the button.	Translate database values. Instruct the system to perform functions with database values.

Setting Up a Mapping

Access the Map Details page.



Map Details page (1 of 2)



Map Details page (2 of 2)

Function Name

Enter the name of the PeopleCode function to execute with this message as an input parameter. The function can use any field in the message to produce an output value for the fields that you map, enabling you to use a field in a function without mapping to it directly. For example, to have the EmplID value sent to the directory to be a value that combines the PeopleSoft EmplID and the salary code, enter a function that produces that value. You then only have to map to the PeopleSoft EmplID field to insert the derived EmplID in the directory.

Message-level functions are defined similarly to attribute-level functions in FUNCLIB_DS_PC.DSDYNFUNC.Ffo, except that the input parameter is the entire message. This function must return a message that contains modified values. The new message will replace the message you selected here.

See Also

Setting Up PeopleCode Attribute-Level Functions

Sequence Nbr, Server

Indicate the order in which the server is used when the system processes this mapping. If the first server is unavailable, the system attempts to access the other servers in sequence until it finds an available one. With multiple servers, this enables you to distribute the load across servers.

Output Type

Select the method that the system uses to send mapped data to directory data. Options are:

I: Output data to the directory directly through a Business Interlink.

F: Output data to an LDAP Data Interchange Format (LDIF) file for manual updating in the directory.

Use the same output type for all your mappings to keep data consistent in the directory.

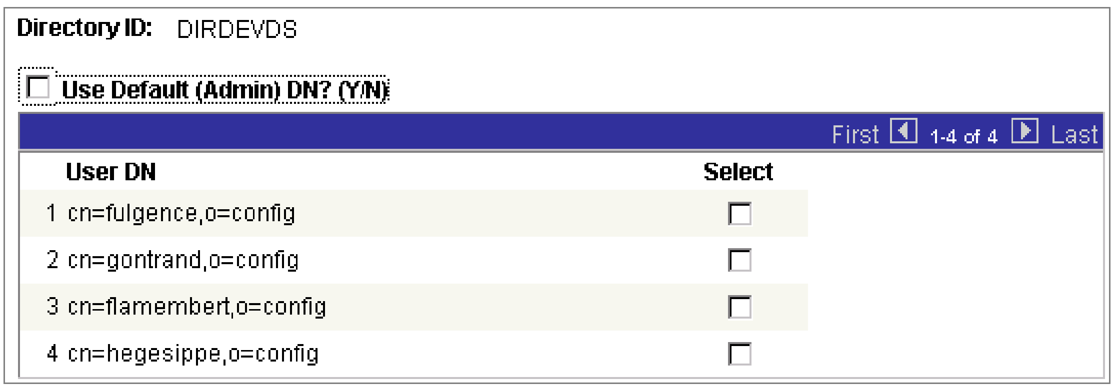
Retain Original Directory Data

When you move data in your directory using the directory interface, the directory interface copies the data to the new location and deletes the old version. Select this check box to instruct the system to retain the original data. To use this functionality later, select this check box before the data move.

Note. Select if your directory contains binary data. Move the binary data with your directory administrative tool.

Changing the Connect DN

Access the Map Details - Modify Connect DN page.



Map Details - Modify Connect DN page

Use Default (Admin) DN? (Y/N) (use default [administrative] DN? [yes/no])

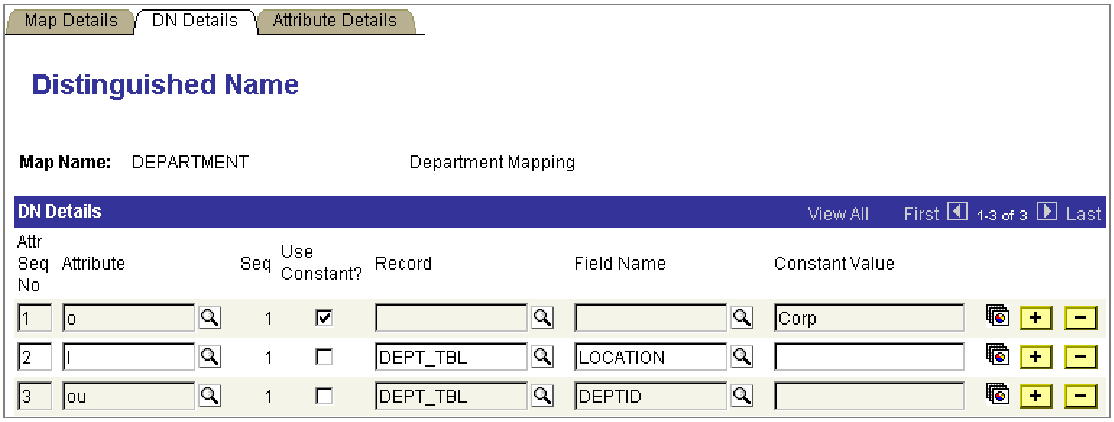
Select this check box to use the default connect DN value that you set up in the Configure Directory component.

User DN and **Select**

Select the alternative IDs that you can use to connect to the specified directory ID. You can use a User ID (and password) besides the default one listed on the Configure Directory component. Because the default user ID is probably an administrative ID, this enables you to set up a more secure user ID for the scope of the mapping.

Setting Up Distinguished Name Details

Access the DN Details page.



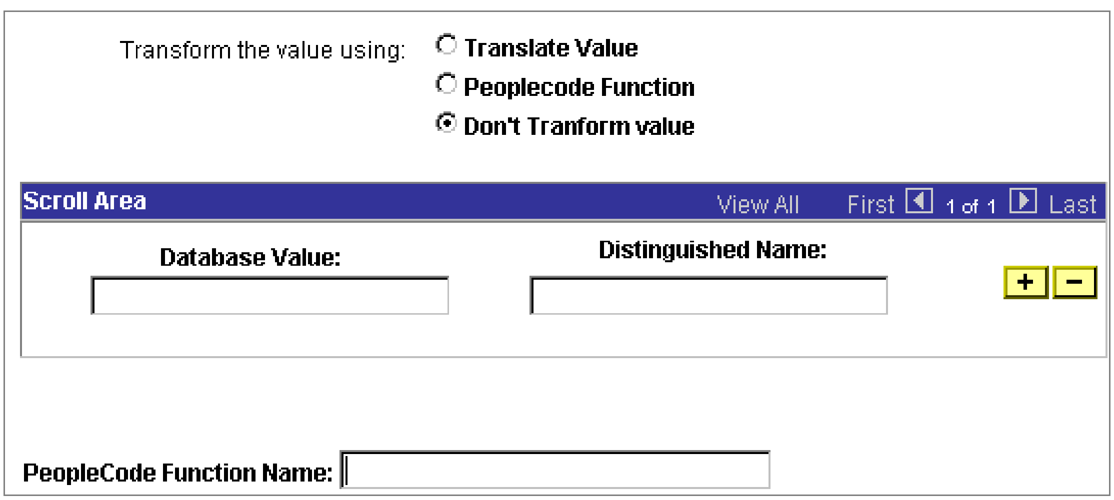
DN Details page

Click to access the Translate Table page if you're translating database values or instructing the system to perform functions with database values.

Note. Use this page when constructing DNs across an active directory with multiple domains.

Translating Database Values

Access the Translate Table page.



Translate Table page

Translate Value — Select to have the system replace the **Database Value** with the **Distinguished Name** value for the selected attribute.

PeopleCode Function — Select to have the system use the selected database object value as a parameter in a PeopleCode function. The system uses the resulting value as the attribute's distinguished name.

Don't transform the value
Select this default value for the field to instruct the system to leave the database value unchanged.

Database Value and **Distinguished Name**
Enter the database value that the system is to replace and the DN value with which the system is replacing it. For example, every time the database value ***Vancouver*** appears in the Location attribute, the system replaces it with the DN ***Van.***

This field is available only when you select **Translate Value** as the transformation option.

PeopleCode Function Name
Enter the name that the system uses to calculate the DN for the selected attribute.

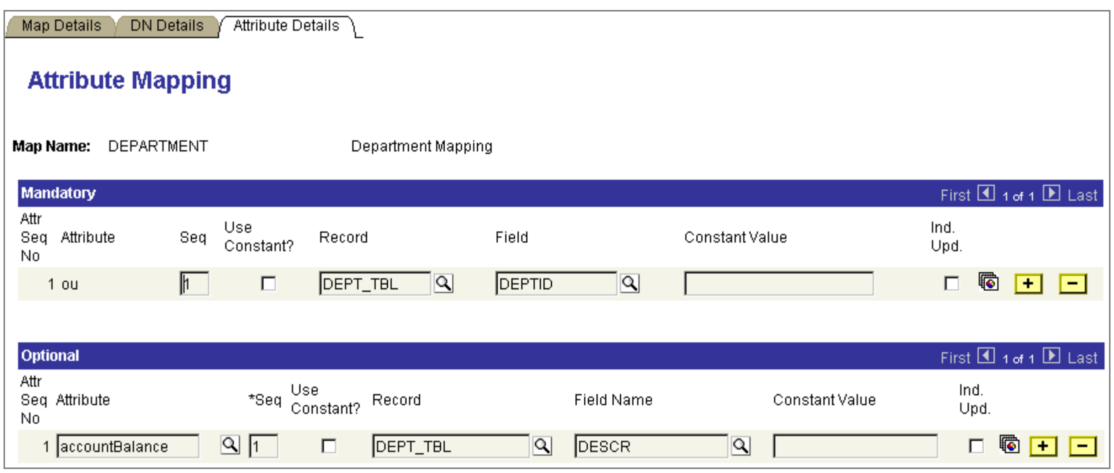
This field is available only when you select **PeopleCode Function** as the transformation option.

See Also

Setting Up PeopleCode Attribute Level Functions

Mapping PeopleSoft Data to Directory Object Class Attributes

Access the Attribute Details page.



Attribute Details page

You must enter mapping information for the directory attributes listed in the **Mandatory** group box.

Warning! Map mandatory attributes to required fields. The fields that you map to mandatory attributes must contain data, or the mapping fails. You can guarantee the presence of data in the fields by using only required fields.

You can enter mapping information for additional directory attributes in the **Optional** group box. Use optional attributes to provide information about the object class beyond the information provided by the DN and mandatory attributes.

Ind Upd (indirect update) — Select if the field that you selected serves as an attribute in the directory beyond this mapping and it's to be updated when this field is updated. The system updates attributes only in entries below this entry on the Directory Information tree.

 — Click to access the Translate Table page if you're translating database values or instructing the system to perform functions with database values.

See Also

Translating Database Values

Setting Up Directory Authentication Mapping

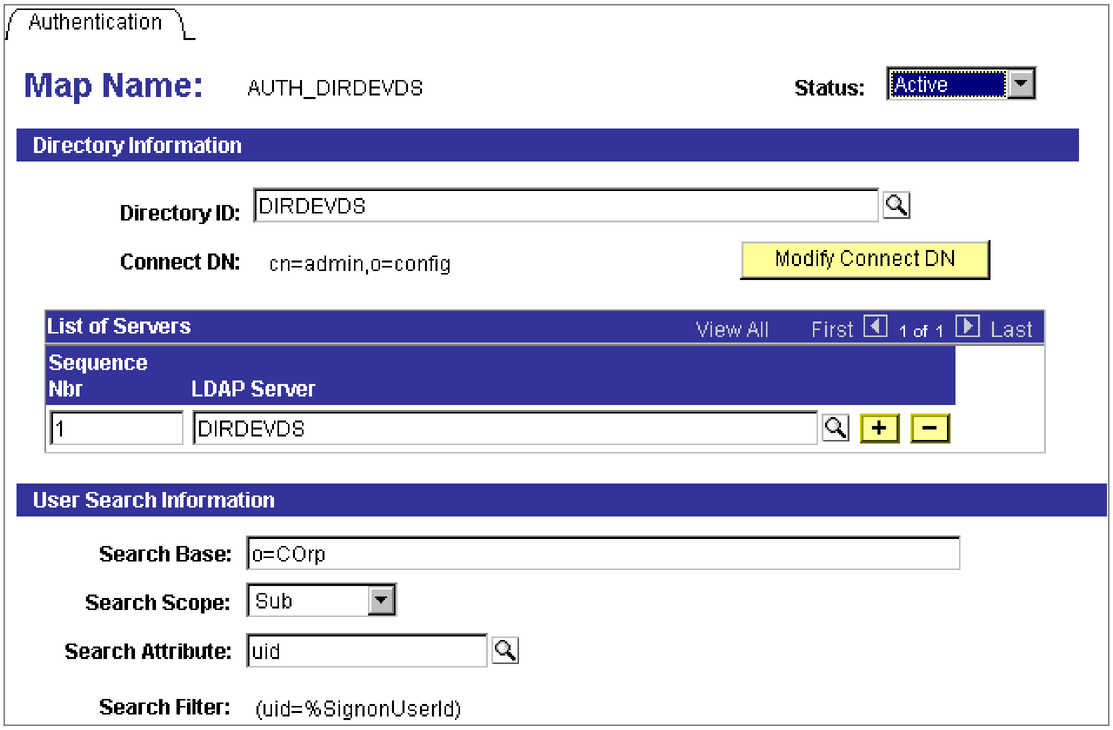
This section describes how to set up directory authentication mapping.

Pages Used to Set Up Directory Authentication Mapping

Page Name	*Object Name*	*Navigation*	*Usage*
Authentication	DSSECMAPMAIN	Directory Interface, Manage Directory, Use, Authentication Map	If you're implementing directory authentication, create a mapping for the directory that the system relies on for authenticating users.
Authentication Mapping - Modify Connect DN	PSDSUSERDN	Directory Interface, Manage Directory, Use, Authentication Map Click the Modify Connect DN button.	Change the Connect DN.

Setting Up Directory Authentication Mapping

Access the Authentication page.



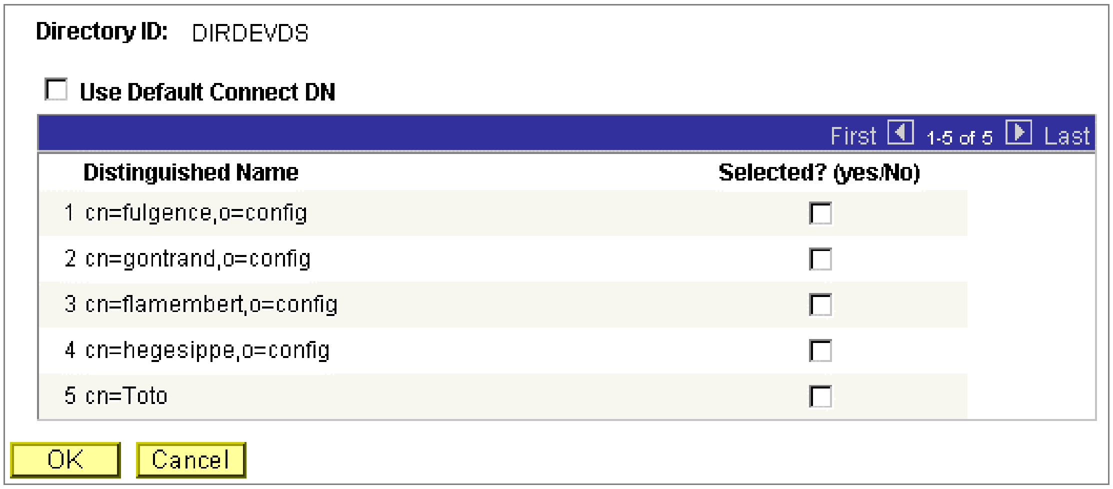
Authentication page

Note. After installation of PeopleSoft Directory Interface, the Authentication page replaces the Directory Authentication page in the Maintain Security menu.

Sequence Num (sequence number) and **LDAP Server**	Set the order in which the system accesses the selected servers for authentication.
Search Attribute	Enter the attribute to be returned by the search, such as user ID ***(uid)*** or customer ID ***(cid).***
Use Search Information	Displays the LDAP search filter that the system uses to search the directory for equal entries.

Changing the Connect DN

Access the Authentication - Modify Connect DN page.



Authentication Mapping - Modify Connect DN page

Use Default Connect DN	Select to use the default connect DN value that you set up on the Configure Directory page.
Distinguished Name and **Selected? (yes/No)**	Select the DNs that the system uses for connection. If a DN isn't selected, the system bypasses it during connection.

Setting Up User Profile Mapping

Manage your user cache in the PeopleSoft database with user profile mapping. Specify user properties in the User Profile Map component. The system uses the properties as columns in the PeopleTools security table, PSOPRDEFN, and populates them with user data.

Note. Supply user properties to Signon PeopleCode only if you're authenticating users with your LDAP directory.

In this section, we discuss how to:

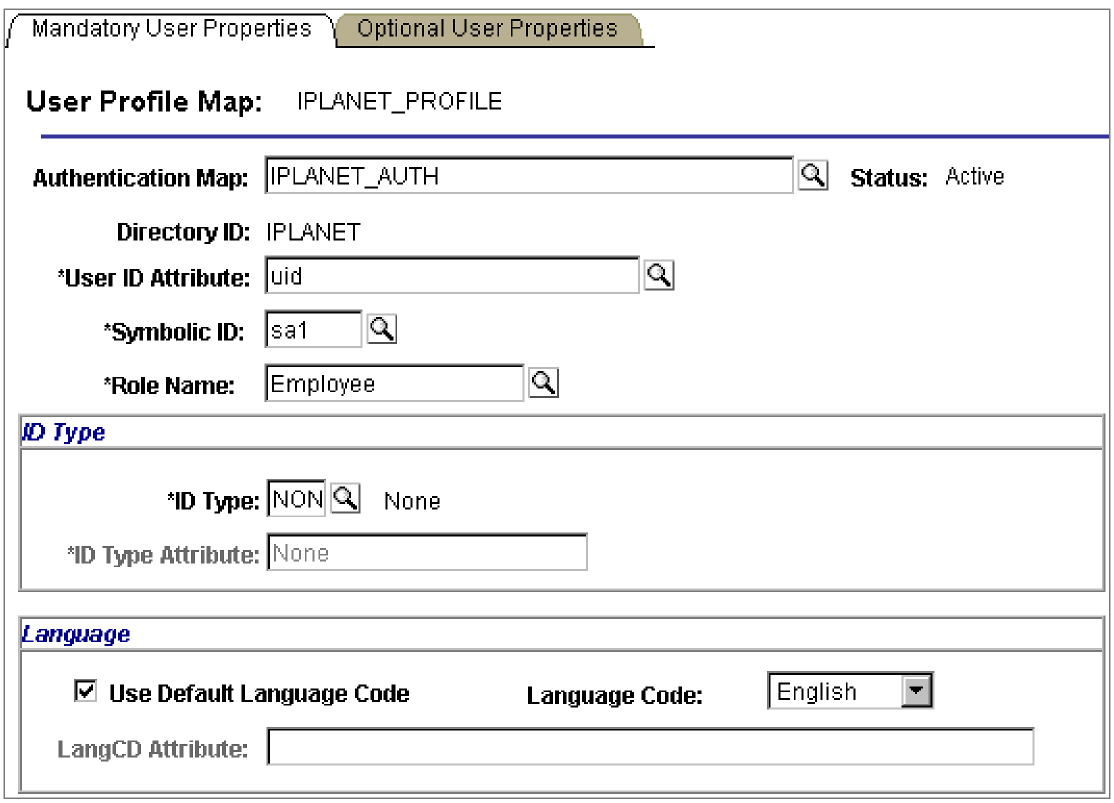
- Specify attributes required for signon.
- Specify optional user properties.

Pages Used to Set Up User Profile Mapping

Page Name	*Object Name*	*Navigation*	*Usage*
Mandatory User Properties	DSUSRPRFCMANMAP	Directory Interface, Manage Directory, Use, User Profile Map	Specify attributes required for signon. Select to have the system retrieve these mandatory values from the directory server, or enter default values.
Optional User Properties	DSUSRPRFLOPTMAP	Directory Interface, Manage Directory, Use, User Profile Map	Specify optional user properties to store in and retrieve from the directory. Specify general, permission list, and workflow attributes.

Specifying Attributes Required for Signon

Access the Mandatory User Properties page.

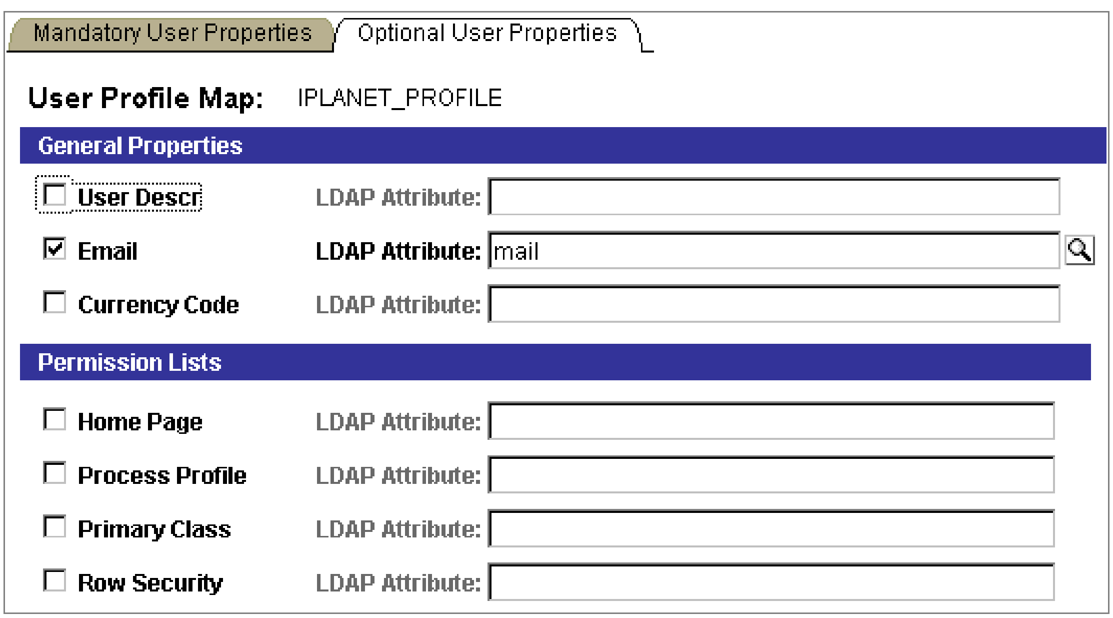


Mandatory User Properties page

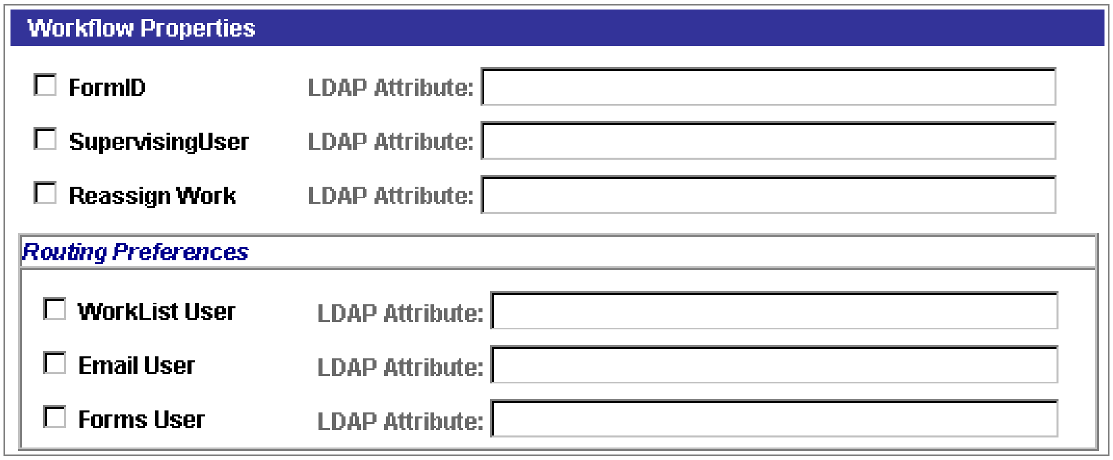
Authentication Map and **Status**	Select the authentication map. The system displays the associated status and **Directory ID.**
User ID Attribute	Select the attribute against which the system authenticates for this profile.
Symbolic ID	Enter a symbolic ID for all users to be stored in your PeopleSoft database.
Role Name	Enter the role to be assigned to new users the first time they sign on without assigned roles. Typically, this role has only basic access authorizations. Users should get most permissions through dynamically assigned roles.
ID Type	Default ID type for new users
ID Type Attribute	The LDAP attribute that holds the selected value.
Use Default Language Code	Select if you don't maintain language codes in the directory.
Language Code	If the default language code isn't stored in the directory, select a default value.
LangCD Attribute (language code attribute)	Displays the LDAP attribute containing the language code. The value retrieved from the attribute must be a PeopleSoft language code.

Specifying Optional User Properties

Access the Optional User Properties page.



Optional User Properties page (1 of 2)



Optional User Properties page (2 of 2)

PeopleSoft applications use this cache, not LDAP, whenever a transaction requires user information. After a user signs onto the system and the Signon PeopleCode executes, PeopleSoft creates a row for that user in the user definition table by retrieving the LDAP information and creating a local cache. Signon PeopleCode maintains this row automatically. Any changes made in the directory server are reproduced in the local cache.

Select the necessary PeopleSoft fields (listed as check boxes) to map to the LDAP attribute that you enter in the corresponding **LDAP Attribute** field.

For the PeopleSoft Security Table field:	*The corresponding LDAP attribute is:*
User Descr (user description)	User name.
Email	Users' mail address, if you use workflow or another system that generates emails for users.
Currency Code	Users' native or base currency.
Home Page	The homepage associated with PeopleSoft Workflow (Navigator Homepage).
Process Profile	Users' permission lists required for processing (viewing output, updating run locations, restarting processes, and so on).
Primary Class and **Row Security**	Users' primary permission list and row security permission lists.
Form ID	Users' Lotus Notes form ID, used for routing forms.
SupervisingUser	User ID of users' supervisor, used to forward information to supervisors.

For the PeopleSoft Security Table field:	***The corresponding LDAP attribute is:***
Reassign Work	Use this field to reassign any pending work for this role user if positions change or a user goes on temporary leave, such as a vacation. If this user has work items waiting for attention (as indicated by Total Pending Worklist Entries in your workflow interface), select the **Reassign Work** check box and select the user to whom to forward work items.
WorkList User	Enter the attribute that contains the worklist names.
Email User	Enter the attribute that contains the email routings names.
Forms User	Enter the attribute that contains the Lotus Notes forms names.

Setting Up Role Membership Options

PeopleSoft Directory Interface enables you to keep your external directory groups synchronized with the data stored in the PeopleSoft database.

The Role Membership Rules and Entry Membership Rules components enable you to enforce system-wide security. The Role Membership Rules component is for modifying a PeopleSoft role based on directory criteria, and the Entry Membership Rules component is for modifying a directory entry, such as a group, based on criteria stored in the PeopleSoft database.

Entry membership rules use the security features of LDAP directories by associating directory groups with PeopleSoft rules and business events. They provide a method of matching any type of directory entry with meaningful rules in PeopleSoft; therefore, you can use membership rules to create any type of logical grouping in the directory. The groupings aren't restricted to security purposes.

In this section, we discuss how to:

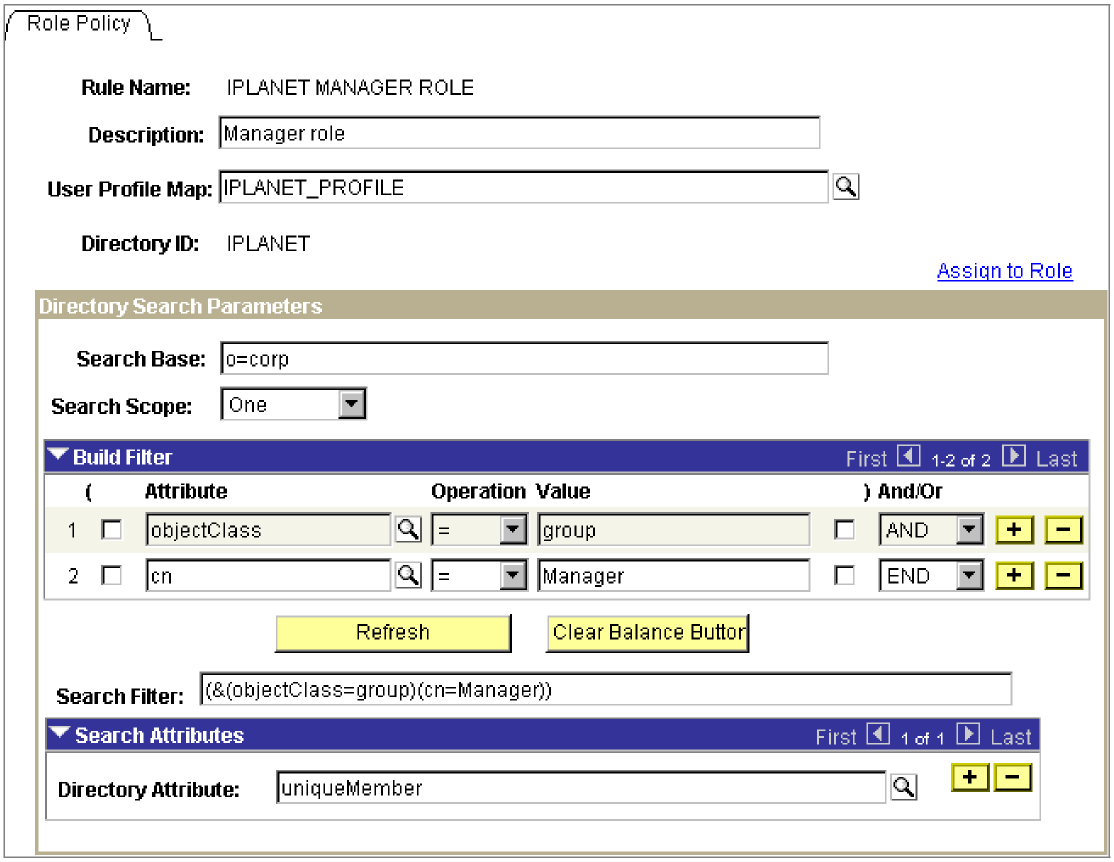
- Define role policy rules.
- Create a container definition.
- Establish container membership rules.

Pages Used to Set Up Role Membership Options

Page Name	***Object Name***	***Navigation***	***Usage***
Role Policy	DSSECROLERULE	Directory Interface, Manage Directory, Use, Role Membership Rules	Define rules that are read by Dynamic Role Rule PeopleCode and populate PeopleSoft roles with members. The rules return the DNs of "people" entries, which supply the system with user IDs specified in user profile mapping.
Entry Definition	DSCONTAINTERDEFN	Directory Interface, Manage Directory, Use, Entry Membership Rules, Entry Definition	Create an entry definition.
Entry Membership Rules	DSSECRULES	Directory Interface, Manage Directory, Use, Entry Membership Rules, Entry Membership Rules	Establish entry membership rules.

Defining Role Policy Rules

Access the Role Policy page.



Role Policy page

Rule Name	The directory search name that you entered on the search page.
User Profile Map	Select the user profile map to associate with the rule.
Assign to Role	Click this link to launch the Maintain Security, Roles - Dynamic Members page. There, select Directory Rule Enabled and specify the server for executing the rule.
Directory Attribute	Select the attribute that identifies the user to add to this membership.

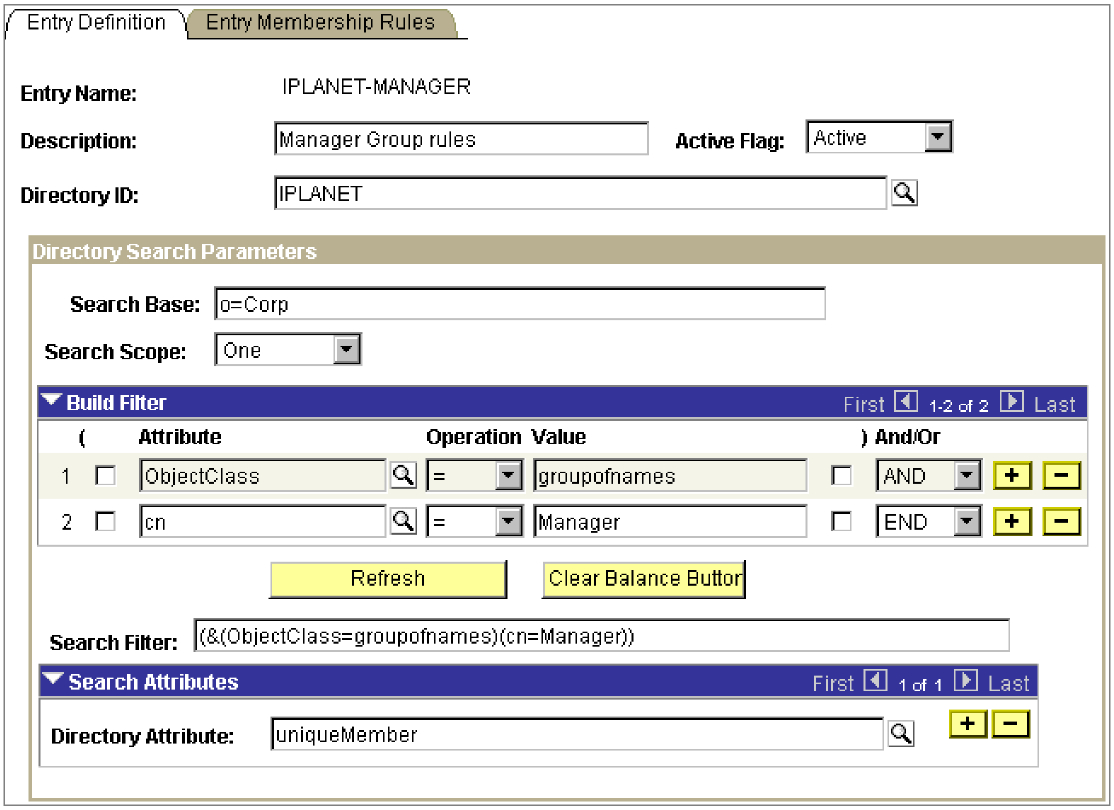
Note. The role membership can involve more than directory groups. You can determine it using arbitrary LDAP search criteria, such as conditions besides group membership. For example, you could assign everyone whose last name starts with *S* to a role.

Directory Search Parameters

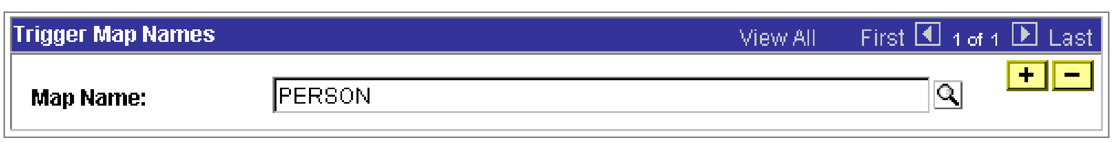
Use the search and filter fields to specify the search parameters that are read by Dynamic Role Rule PeopleCode and populate PeopleSoft roles with members.

Setting Up Entry Definitions

Access the Entry Definition page.



Entry Definition page (1 of 2)



Entry Definition page (2 of 2)

Entry Name	The entry name that you entered on the search page.
Active Flag	Select the appropriate option to enable and disable rules. Rules that aren't active don't execute.
Map Name	Select names of maps to associate with the container definition. Besides being a security feature, this can improve performance at runtime, because only applicable rules are evaluated.

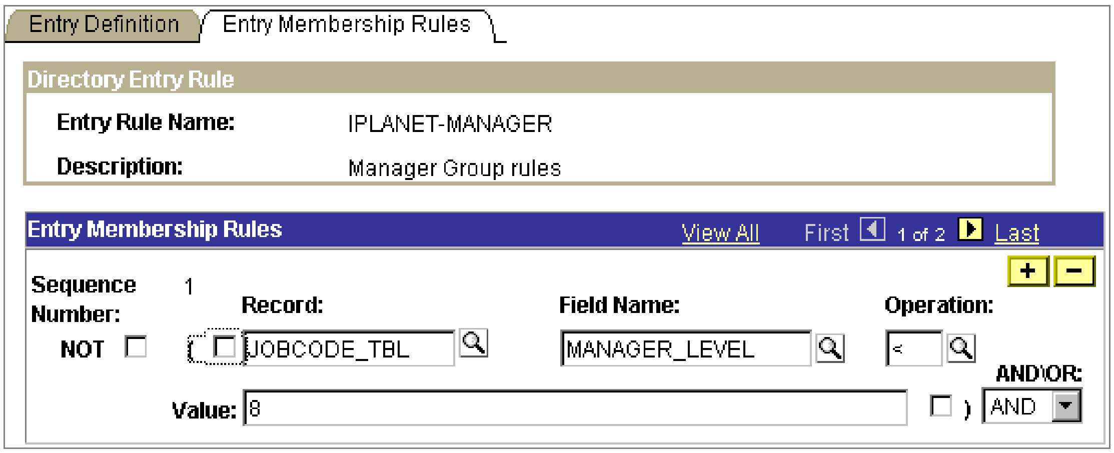
Note. The system initializes the Entry Membership Rules that you set up when you run a directory load or a change is made to PeopleSoft data that impacts an entry's membership in the directory.

See Also

"Using Directory Interface," Auditing the Directory

Setting Up Entry Membership Rules

Access the Entry Membership Rules page.



Entry Membership Rules page

Entry Rule Name The current entry rule.

Sequence Number The sequence of a rule in a rule set—significant when you enter more than one rule. Insert additional rules using the plus button.

NOT Select to negate the rule that you enter. Similar to using *!* to reverse the truth value of an operand.

The entry rules are logical expressions that can be true or false. They are composed of filters on database objects associated by logical operators. Rules have the following form:

```
[NOT] [ ( ] Record . Field operator Constant [ ) ] [AND/OR]
```

The symbols between square brackets are optional. The operator can be <, <=, <>, =, >, or >=. A rule set is composed of single rules joined by AND or OR Boolean operators, if necessary. The following example shows a series of single rules joined to make one compound rule.

(JOB.LOCATION = 'KC004' AND [1]

JOB.COMPRATE > 15000) OR [2]

NOT JOB.DEPTID = 'GBIY004' [3]

An unlimited number of rules can be used in a rule set.

Loading PeopleSoft Data Into a Directory

Use the Directory Load process to load PeopleSoft data into your directory. The process overwrites any data in your directory. You can run the Directory BI Status report to report on any errors that occur as a result of the load process.

If your directory has data, we recommend using the Directory Audit process, not the Directory Load process, to determine what the differences are and apply only required changes.

In this section, we discuss how to run the directory load process.

See Also

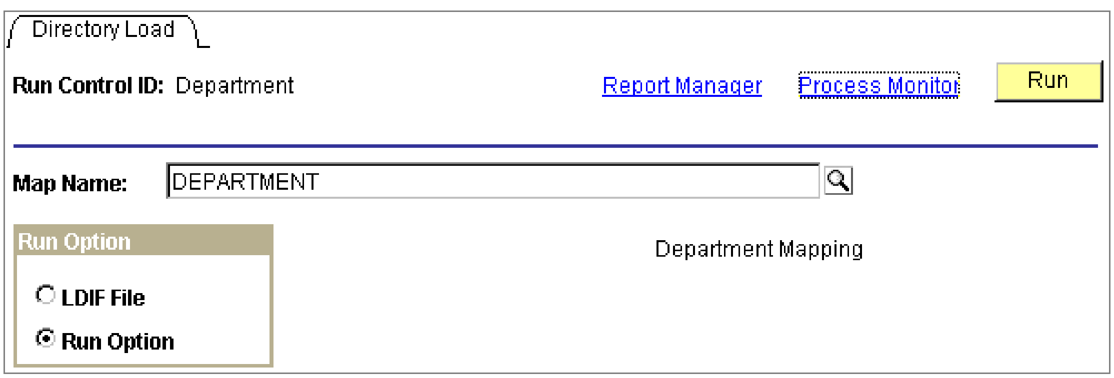
"Using Directory Interface," Auditing the Directory

Page Used to Load PeopleSoft Data Into a Directory

Page Name	***Object Name***	***Navigation***	***Usage***
Directory Load	RUNCTL_DS_LOAD	Directory Interface, Manage Directory, Process, Directory Load	Load PeopleSoft data into a directory.

Running the Directory Load Process

Access the Directory Load page.



Runctl Ds Load page

LDIF File Select to have the process send data to an LDIF file for you to load into the directory.

Direct Update Select to have the process directly update the directory.

CHAPTER 4

Using PeopleSoft Directory Interface

This chapter discusses how to:

- Audit the directory.
- Query the directory.

Auditing the Directory

In this section, we discuss how to run the Directory Audit process.

The Directory Audit process compares directory data with the data in the PeopleSoft database identified in a selected map and creates an LDAP Data Interchange Format (LDIF) file containing any discrepancies, using PeopleSoft as the authority. You can use the LDIF file to update the directory.

We recommend using the Directory Audit process, not the Directory Load process, to load PeopleSoft data into your directory if you have an existing directory and are using PeopleSoft Directory Interface for the first time. The audit process enables you to compare your existing data with the PeopleSoft data before uploading the data.

To create a report containing discrepancies found by the directory audit process, use the Directory Audit report.

To run the Directory Audit process:

1. Access the Directory Audit - Run Parameters page.
2. Select the name of the map that you're auditing.
3. Run the process.

See Also

"Configuring PeopleSoft Directory Interface," Loading PeopleSoft Data Into a Directory

Page Used to Audit the Directory

Page Name	Object Name	Navigation	Usage
Directory Audit - Run Parameters	RUNCTL_DS_AUDIT	Directory Interface, Manage Directory, Process, Directory Audit	Run the directory audit process.

Querying the Directory

In this section, we discuss how to:

- Define search parameters for querying the directory.
- View the results of the search that you set up.

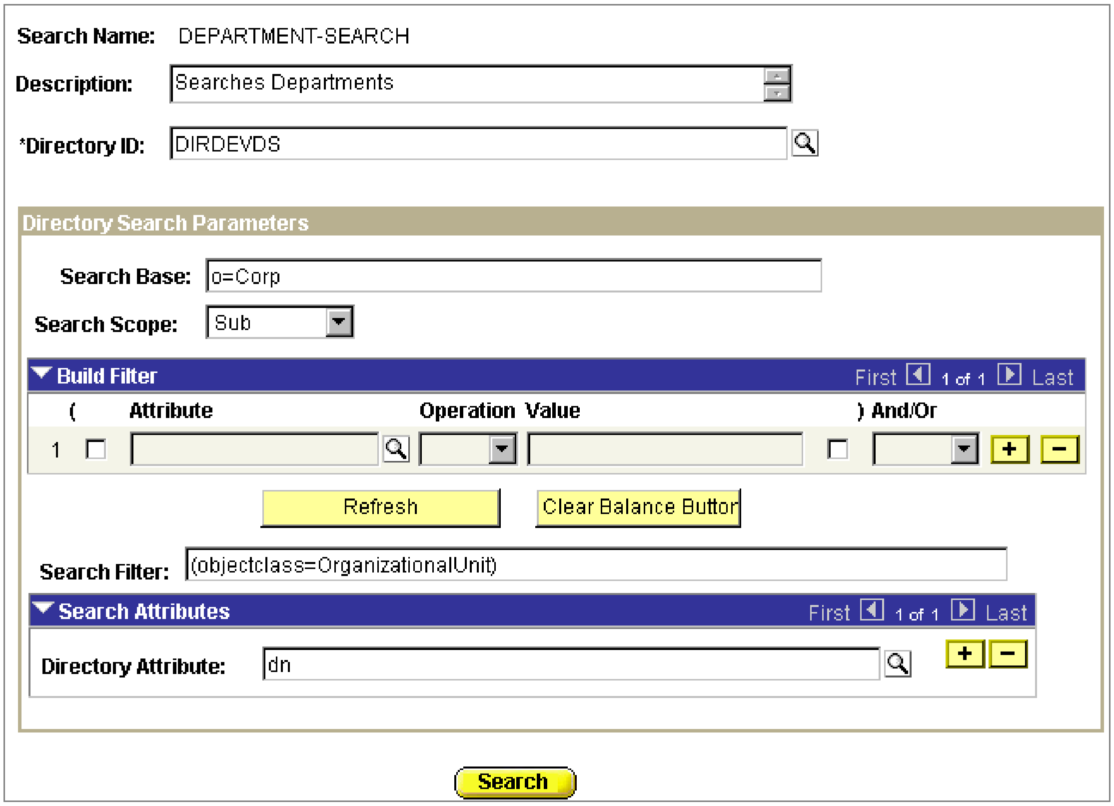
Use the Directory Search Component to define search parameters for querying the directory and viewing results. The search parameters that you set up on the Execute Search page can be saved for future use, so you don't have to reenter them. Search results are displayed on the Search Results page as they appear in the directory.

Page Used to Query the Directory

Page Name	Object Name	Navigation	Usage
Directory Search	DSSRCHDIRECTORY	Directory Interface, Manage Directory, Inquire, Directory Search	Define search parameters for querying the directory and view the results. The component saves the search parameters for future use.

Defining Search Parameters

Access the Directory Search page.



Directory Search page

Search Name

The system saves search parameters that you enter on this page and stores them under this name for future use.

Build Filter

Use this group box to create an attribute-specific filter. For example, to query data on an individual, enter the attribute name ***Person,*** operation **=,** and the person's name in the **Value** field. You can build multiple filters.

Search

Click to query the directory using the parameters and view the results.

Viewing Query Search Results

475 entries found

ou=ZP00000003,l=ZLOC0003,o=Corp

ou=ZP00000002,l=ZLOC0003,o=Corp

ou=ZP00000001,l=ZLOC0003,o=Corp

ou=ZD00000006,l=ZLOC0002,o=Corp

ou=ZD00000005,l=ZLOC0003,o=Corp

ou=ZD00000004,l=ZLOC0002,o=Corp

ou=ZD00000003,l=ZLOC0002,o=Corp

ou=ZD00000002,l=ZLOC0001,o=Corp

ou=ZD00000001,l=ZLOC0001,o=Corp

ou=L9400,l=L10001,o=Corp

ou=L9300,l=L10003,o=Corp

ou=L9200,l=L10001,o=Corp

ou=L9000,l=L10001,o=Corp

Query Search Results page

This page displays the results of the search, in directory format, that you set up on the Directory Search page. To print these results, print your screen’s contents; save them by selecting, copying, and pasting them into a document file.

C H A P T E R 5

Appendix A: PeopleSoft Directory Interface Reports

This appendix provides an overview of reports in PeopleSoft Directory Interface and enables you to:

- View summary tables of all reports.
- View report details and source records.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

PeopleSoft Directory Interface Reports: General Description

This table lists the PeopleSoft Directory Interface reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

See Also

PeopleSoft Directory Interface Reports: A to Z

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
DS001 Directory Audit	Compares PeopleSoft data with directory data and identifies discrepancies. Run the Directory Audit process before running this report. Runs off the temporary table PS_DSCOMPARE created by the directory audit process.	PeopleTools, Directory Interface, Report, Directory Audit Rpt	RUNCTL_DS_AUD_RPT
DS002 Directory Business Interlink Status	Lists all errors that were produced during use of PeopleSoft Business Interlinks to update the directory.	PeopleTools, Directory Interface, Report, Directory BI Status Rpt	RUNCTL_DS_BI_RPT

PeopleSoft Directory Interface Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

DS001 - Directory Audit

The Directory Audit process creates an LDAP Data Interchange Format (LDIF) file containing the data that differs between the PeopleSoft database and the directory. The Directory Audit report is based on this record, so you can verify what will be updated in the directory if you apply the LDIF file in the directory. The report also includes any errors.

See Also

"Using PeopleSoft Directory Interface," Auditing the Directory

Directory Entry Map Name Enter the name of the map whose audit results you're reporting.

Source Record

PS_DSCOMPARE

DS002 - Business Interlink Status

Business Interlink Status reports on the error record produced because of the business interlinks, if you selected the *Business Interlinks* output type when setting up a map on the Directory Mapping component.

Directory Entry Map Name	Enter the name of the map whose Business Interlink activity you're reporting.
Delete History Error Rows for MAP?	Select to instruct the process to delete the historical error rows for this map after reporting them. The PS_DS_BILOAD_ERR record retains error data for this map until you run the report with this check box selected.

Source Record

PS_DS_BILOAD_ERR

Index

S

T

