Telelogic DASHBOARD
LDAP Membership Provider
Release 3.6

This edition applies to 3.6.0, Telelogic Dashboard and to all subsequent releases and modifications until otherwise indicated in new editions.

About this manual

Welcome to Telelogic Dashboard, a powerful tool to measure, analyze and manage the complete development lifecycle.

Typographical Conventions

The following typographical conventions are used in this manual:

Typeface or Symbol	Meaning
Bold	Book titles, important items, and selectable objects, including buttons and menus. For example: Click **Yes** to continue.
Courier	Commands, files, and directories; computer output. For example: Edit your `.properties` file.
>	A menu choice. For example: Select File > Open. This means select the File menu, then select the Open command from it.

Related Documentation

The following table describes where to find information in Telelogic Dashboard documentation set:

For information on	See
How to install Telelogic Dashboard and set up licenses to use it.	Installation Guide
General features and operation	Online Help
How to use Telelogic Synergy	Using Synergy
How to use Telelogic DOORS	Using DOORS

You will find PDF versions of the manuals on:

- The Telelogic documentation CD

- Our web site at http://support.telelogic.com

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1 Introduction

This document describes how to configure Telelogic Dashboard to use an LDAP server to authenticate users.

1.1 Overview

Today's organizations strive to meet the demands of their market while delivering quality products in a timely manner. To achieve this end, managers are required to review an overwhelming and often conflicting volume of reports to meet deadlines. Without adequate plans and the ability to evaluate the performance of a program or project against that plan, it would be increasingly difficult to make proper adjustments, learn from previous mistakes, and ensure that the project meets its ultimate goal and achieve business success.

Telelogic Dashboard is a performance measurement application, accessible via a web browser. It allows executives, software managers, and project managers to keep track of the development of their applications, their resources, and the delivery of their products. It provides solutions for measurement and metrics, collects data from disparate teams and applications, and presents intuitive summary charts of key information in a single view. This consolidated view allows users to analyze trends, to manage by exception, and to drill down for more information when necessary.

Telelogic Dashboard has built-in data collection interfaces for common file formats (such as CSV and Excel), databases (such as ODBC, Microsoft SQL and Oracle), as well as commercial applications (such as Microsoft Project, Telelogic Change, Synergy, and DOORS). It has the ability to display up-to-date project status information in a graphical multi-level format from all these applications so that managers can focus on decision making rather than manually gathering data and compiling reports to ensure the success of their business.

1.2 What is Measurement?

Measurement is the process used by managers to monitor and control the processes, resources, and products that are part of their program. The purpose of measurement is to:

- Characterize (baseline performance)
- Evaluate (actual vs. plan)
- Predict (estimation and prediction)
- Improve (process improvement)

Managers need a mechanism to document expectations and plans for key aspects of their program, have confidence that the product will be delivered on time, and ensure that past mistakes will not reoccur. Engineering tools do not provide a way to setup a plan line, evaluate

processes against the plan, and do management by exception, which is why measurement applications like Telelogic Dashboard are necessary for a project's success.

Primary software measurement guidance is provided by ISO/IEC Software Measurement Processes, DOD PSM Practical Software and Systems Measurement and CMMI. These processes tell organizations how well they are doing in specific areas. They do not outline *how* to do measurement and *which* measurements must be deployed. They simply provide an organization with general guidelines in reaching compliance.

Telelogic Dashboard helps in all process areas of deploying measurement: from planning to setting up your project accurately to monitoring to controlling. It helps establish measurement objectives; define measures; data collection procedures; analysis procedures; collect data; helps analyze and store data and results; and communicate the results to your team.

1.3 TELELOGIC Dashboard High Level Features

Telelogic Dashboard is a performance measurement application that provides a number of key features to managers, allowing them to control and monitor their projects, including:

- Standard items that simplify and speed up the deployment of popular standards and maturity models
- Automated extraction and analysis of data
- Dashboards based on lifecycle phase, ensuring managers have the most relevant and up-to-date information
- Delivery of Dashboards to managers using a standard web browser
- Extensive tailoring capabilities to support organizational-specific processes, products and measurement requirements
- Security features to control access to data
- A set of licensed interfaces for data collection
- User licenses (managers and administrators)

2 Installing the LDAP Membership Provider

2.1 Overview of LDAP Membership Provider

The LDAP Membership provider allows users to enter LDAP accounts and passwords when logging into the Telelogic Dashboard Portal. Because the Telelogic Dashboard is an ASP.NET application, it uses a built-in mechanism, called a membership provider, to authenticate against external lists of users (such as LDAP). The Dashboard LDAP Membership provider is an add-on which uses the membership provider mechanism of ASP.NET.

2.2 Pre-Requisites

Before installing the LDAP membership provider, you should ensure that:

- Dashboard has been installed and configured correctly. For more information on installation and configuration, please consult the Dashboard Installation Guide.

- a Dashboard Administrator account exists and can access the Admin tab login in order to create and modify accounts

- the Telelogic Directory Server has been installed and configured.

2.3 Running the Install

The LDAP Membership Provider is provided as a single install file (an ".msi" file). Download or copy the install file to the server where the Dashboard Portal is installed. Using Windows Explorer, run the install. The install should be run by an administrator, or an account that has local administration permissions.

Once the installation starts, you will see the following screen.
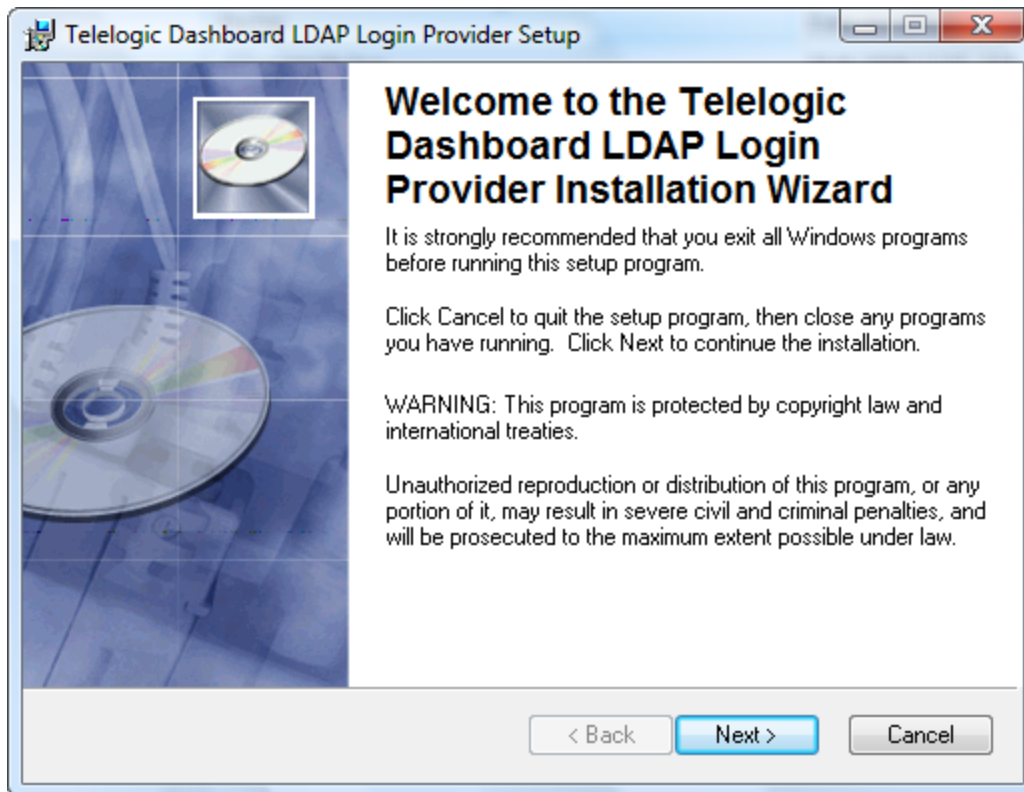
Press the "Next" button to proceed.

This screen requires you to read and accept the software license agreement.
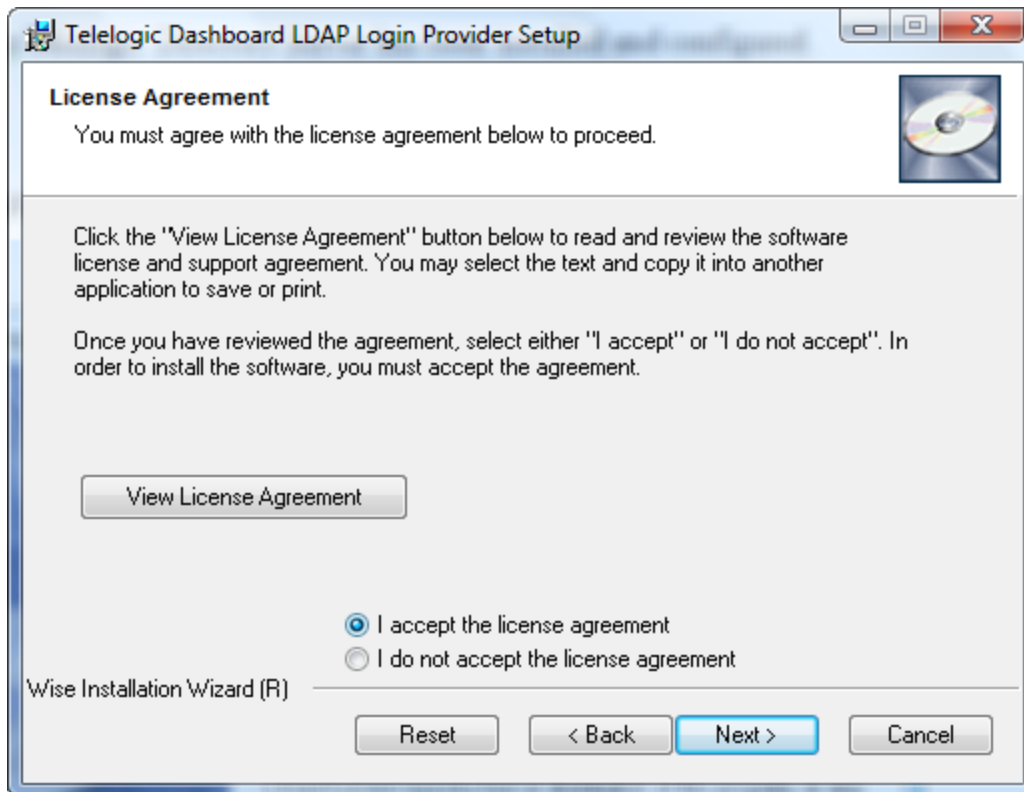
To view the agreement, press the "View License Agreement" button. To proceed with the installation, select "I accept the license agreement" and then press the "Next" button.

On this screen, you must select the folder where the Dashboard Portal was installed. You may use the "browse" button to select a different path.
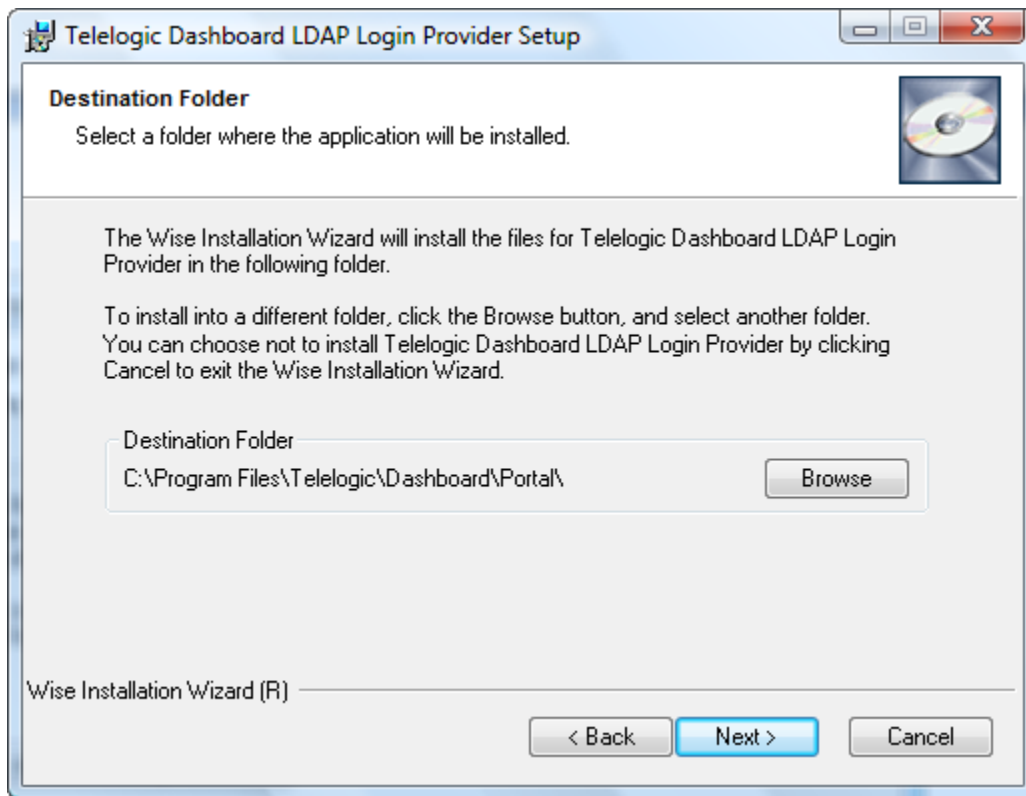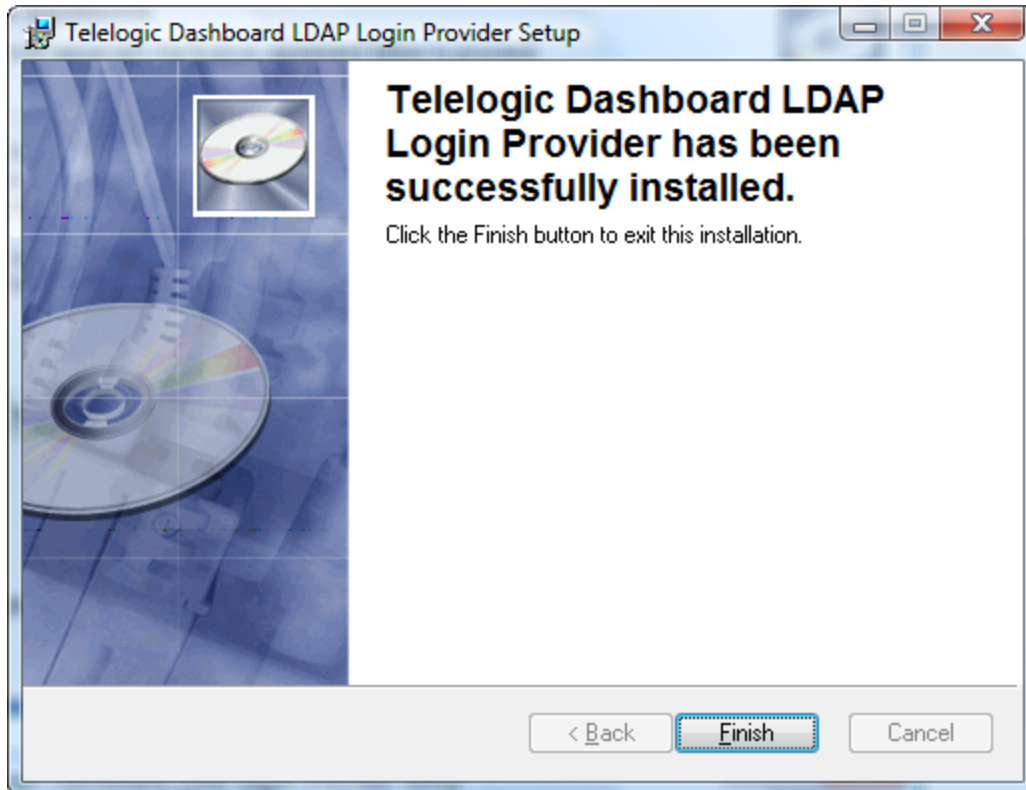

Once the folder has been selected, press the "Next" button.

The installer is now ready to install the LDAP provider.
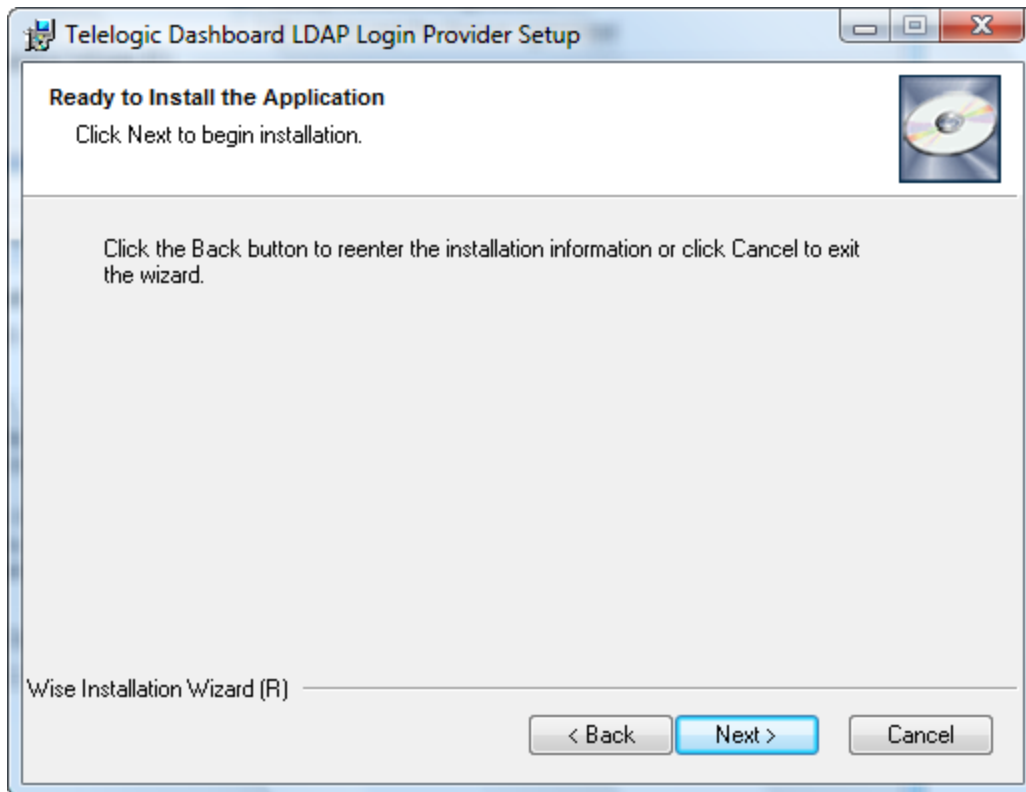
Press the "Next" button to start the install.

Installation is now complete.

Press the "Finish" button to exit the installation.

3 Configuring the Portal for LDAP

Login authentication for the Dashboard Portal is configured via a web.config file, located in the Portal's root folder. The web.config file can be modified using a text editor. You may also use an XML editor, many of which identify comments and provide features which make editing easier.

To configure the Portal to use LDAP, follow these steps in the indicated order:
1. Configure a Dashboard Administrator account for LDAP login
2. Disable Windows and other types of authentication
3. Enable forms authentication using the LDAP membership provider
4. Enter your site's LDAP server information
5. Login To LDAP

If you do not perform the first step, you will not be able to modify or configure your site after switching to LDAP (since no accounts will have been configured to use LDAP) and you will have to switch back to Windows authentication.

3.1.1 Configure a Dashboard Administrator Account for LDAP Login

On the Admin tab of the Portal, you should create a new account, or modify an existing account such that the account allows an LDAP user to access the portal with an administrator license. To make this change, select the "Admin" tab and then click on the "Accounts" command from the left-hand side navigation bar. You can then select the "Edit" button corresponding to the account you wish to modify, or select the "Add" button to create a new one.

In the following figure, the page which allows editing a user is shown. The account field is filled in with "ldapadmin" which is the id of a user which has previously been defined in the LDAP server. (Note that when using a Windows authentication, the account field would be filled in with an account of the form DOMAIN\username.)

Once you have made the appropriate changes, press the "save" button to save and return to the previous screen.

3.1.2 Disable Windows Authentication

After installation, the Portal web.config file is configured for Windows authentication via two lines in the <system.web> section. The default location for the web.config file is C:\ProgramFiles\Telelogic\Dashboard\Portal\web.config. To disable Windows authentication, make the changes shown below:

(before)
<authentication mode="Windows"/>
 <identity impersonate="true"/>
(before)

To turn off Windows authentication, you can comment the lines out using the XML comment syntax:

(after)
 <!--
<authentication mode="Windows"/>
 <identity impersonate="true"/>
-->
(after)

Note that the XML comments start with "<!" and then two hyphens. XML comments end with two hyphens and then ">".

Once the above changes are made, be sure to save your changes.

3.1.3 Enable Forms Authentication using LDAP Membership

Immediately after the changes made above, enter the following text into the web.config file. Notice that the forms authentication options (for both non-SSL and SSL) are entered immediately after the windows authentication options which were commented out in the last section.

3.1.3.1 Web.Config Example for Non-SSL LDAP

The following example provides a sample of configuring a non-SSL connection from Dashboard to an LDAP server.

(after)
<!--
```
<authentication mode="Windows"/>
 <identity impersonate="true"/>
-->

<authentication mode="Forms">
        <forms loginUrl="App_UI/Misc/Login.aspx"
                name=".DashAuth"
                 path="/"
                defaultUrl ="Default.aspx" />
</authentication>
<authorization>
        <deny users="?" />
        <allow users ="*"/>
</authorization>

<membership defaultProvider="DashMembershipProvider">
  <providers>
        <add name="DashMembershipProvider"
                type="Distributive.Security.LdapProvider, LdapMembership,
                        Version=1.0.0.0, Culture=neutral "

                ldapServer="localhost"
                ldapPort="1389"
                ldapDn="ou=people,dc=Telelogic,dc=com"
                ldapUseSSL="false"
```

```
        ldapProperty="uid"
        ldapCertificate="none"  />
```

        </providers>
</membership>
(after)

Once these changes are made, save the web.config file.

3.1.3.2 Web.Config Example for SSL (Secure mode) LDAP

The following example provides a sample of configuring a SSL connection from Dashboard to an LDAP server.

(after)
<authentication mode="Forms">
        <forms loginUrl="App_UI/Misc/Login.aspx"
                name=".DashAuth"
                 path="/"
                defaultUrl ="Default.aspx" />
</authentication>
<authorization>
        <deny users="?" />
        <allow users ="*"/>
</authorization>

<membership defaultProvider="DashMembershipProvider">
        <providers>
                <add name="DashMembershipProvider"
                    type="Distributive.Security.LdapProvider, LdapMembership,
                      Version=1.0.0.0, Culture=neutral "
```
        ldapServer="localhost"
        ldapPort="1389"
        ldapDn="ou=people,dc=Telelogic,dc=com"
        ldapUseSSL="true"
        ldapProperty="uid"
        ldapCertificate="none"  />
```
        </providers>
</membership>
(after)

Make sure that the double quotes are simple (straight down) double quotes and not open and close quotes (which are automatically created by word processing programs such as Microsoft Word)

The **case of the attribute names is important**. For example, you must enter "ldapServer" and not "ldapserver" or "LdapServer".

Once the above changes are made, be sure to save your changes.

3.1.4 Enter Your Sites LDAP Server Information

The LDAP membership provider must be configured in the <membership> section of the web.config file. All attributes are shown in the following table.

Attribute	Description	Default
ldapServer	The ip address or name of the LDAP server.	
ldapDn	The distinguished name within the LDAP server where the user list is located	
ldapPort	The port number of the LDAP server.	"389"
ldapProperty	The property retrieved during login which is compared to the user name entered into the Portal login page.	"uid"
ldapUseSSL	Either "false" or "true", indicating that the LDAP server uses SSL.	"false"
ldapCertificate	The drive, folder and file name of an X509 certificate used by the LDAP server. If no certificate checking is required, you may enter the value "none".	"none"

The first two, ldapServer and ldapDn, are required. The ldapPort is optional and should be changed if the port number is not 389. While the ldapProperty is also optional, in most cases you will need to ask your LDAP administrator for the name of the property which contains the users login name.

Notes:

The **case of the attribute names is important**. For example, you must enter "ldapServer" -- not "ldapserver" or "LdapServer".

You must enter values for the ldapServer property and ldapDn (distinguished name) property. These are the first two rows in the table above and highlighted in yellow in the previous example.
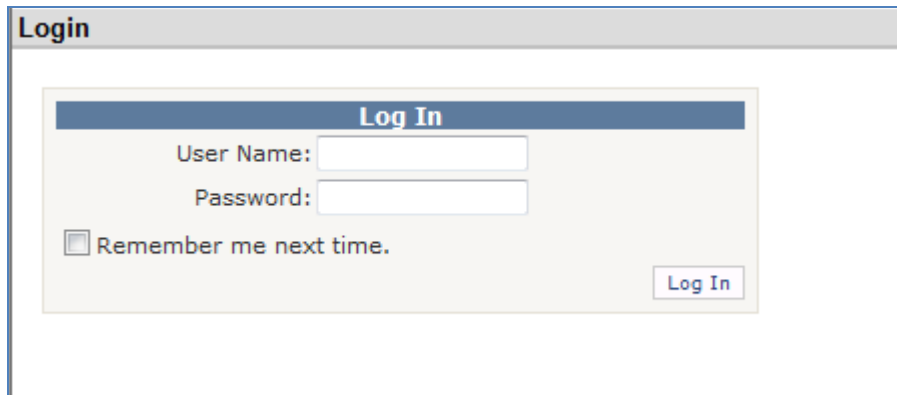
It is imperative that you enter the string "LDAP://" in all upper case letters and not in any other form. (For example "ldap://" will not function correctly.)

Windows folder and file security must be set to allow the account being used for the Portal ASP.NET application pool (for example, the ASPNET worker process) to access the certificate file specified by the ldapCertificate property.

If the file specified in the ldapCertification property does not have a folder name, then the file must be located in the Portal \bin subfolder. Otherwise, you should include a full path, drive and folder, for the file.

3.1.5 Login to LDAP

Once the previous steps are completed, your Dashboard portal will display a login window as shown in the following figure. Users must enter the LDAP account name and password to login.

If a configuration error occurs, please check the Portal log file, located in the \Logs subfolder of the portal. Additional information, depending on the type of error, may be available in the System Event log.

4 Contact Information

To contact Telelogic support, please use any of the following:

Americas	Dashboardsupport.us@telelogic.com
Phone	+1 (800) 577 8449
France	Dashboardsupport.eu@telelogic.com
Phone	0800 917118
Germany	Dashboardsupport.eu@telelogic.com
Phone	0800 1 814562
UK	Dashboardsupport.eu@telelogic.com
Phone	0800 973229
Asia Pacific	Dashboardsupport.apac@telelogic.com
Phone	
Other Europe, Middle East and African counties	Dashboardsupport.eu@telelogic.com
Phone	00800 577 84499 +353 (1) 2090154

Other countries: Please see the website:

http://support.telelogic.com/en/contact/support