IBM Security Verify Identity 7.0

Salesforce.com Adapter Installation and Configuration Guide



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Chapter 1. Overview

An adapter is an interface between a managed resource and the Identity server. The Salesforce.com Adapter enables communication between the Identity server and the Salesforce.com server.

Adapters can be installed on the managed resource. The Identity server manages access to the resource by using the security system. Adapters function as trusted virtual administrators on the target operating system. The adapter creates, suspends, restores user accounts, and other functions that administrators run manually. The adapter runs as a service, independently of whether you are logged on to the Identity server.

Features of the adapter

The adapter automates several administrative and management tasks.

· Creating user accounts in Salesforce.com

Use the adapter to add, modify, or delete the user accounts.

· Assigning roles to users

Use the adapter to assign or unassign roles to the users.

· Assigning profiles to users

Use the adapter to assign or unassign profiles to the users.

· Reconciling user account information

Use the adapter to reconcile information from the managed resource to IBM® Security Verify Identity for synchronization.

Reconciling support data

Use the adapter to reconcile support data.

• Suspending and restoring users

Use the adapter to suspend users or restore users.

Architecture of the adapter

Several components are involved in running and using the adapter. Install all these components so that the adapter can function correctly.

- The RMI Dispatcher
- The Security Directory Integrator connector
- IBM Security Verify Adapter profile

You must install the RMI Dispatcher and the adapter profile; however, the Security Directory Integrator connector might already be installed with the base Security Directory Integrator product.

<u>Figure 1 on page 2</u> describes the components that work together to complete the user account management tasks in a Security Directory Integrator environment.

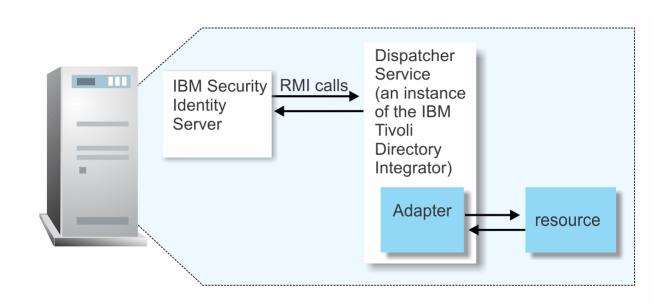


Figure 1. The architecture of the Salesforce.com Adapter

Supported configurations

The adapter supports both single and multiple server configurations.

Supported configurations have the following components:

- The Identity server
- The Tivoli® Directory Integrator server
- The managed resource
- · The adapter

The adapter must be installed directly on the server that runs the Security Directory Integrator server.

Single server configuration

In a single server configuration, install the Identity server, the Security Directory Integrator server, and the Salesforce.com Adapter on one server to establish communication with Salesforce.com.

The Salesforce.com server is on the Internet as described in Figure 2 on page 3.



Figure 2. Example of a single server configuration

Multiple server configuration

In a multiple server configuration, the Identity server, the Security Directory Integrator server, and the Salesforce.com Adapter, are installed on different servers.

Install the Security Directory Integrator server and the Salesforce.com Adapter on the same server as described in Figure 3 on page 3.



Figure 3. Example of a multiple server configuration



Chapter 2. Planning

Installing and configuring the adapter involves several steps that you must complete in a specific sequence. Follow the roadmap for the main tasks.

Roadmap for IBM Security Directory Integrator based adapters, for IBM Security Verify Identity 7.x

Follow this section when using the guide to install, configure, troubleshoot, or uninstall the adapter.

Pre-installation

Complete these tasks.

- 1. Verify that your environment meets the software and hardware requirements for the adapter. See *Prerequisites*.
- 2. Obtain the installation software. See Software downloads.
- 3. Obtain the necessary information for the installation and configuration. See Installation worksheet.

Installation

Complete these tasks.

- 1. Install the dispatcher.
- 2. Install the adapter binaries or connector.
- 3. Install 3rd party client libraries.
- 4. Set up the adapter environment.
- 5. Restart the adapter service.
- 6. Import the adapter profile.
- 7. Create an adapter service/target.
- 8. Install the adapter language package.
- 9. Verify that the adapter is working correctly.

Upgrade

To upgrade the adapter, do a full installation of the adapter. Follow the *Installation roadmap*.

Configuration

Complete these tasks.

- 1. Configure secure communication between the Identity server and the adapter.
 - a. Configure 1-way authentication.
 - b. Configure 2-way authentication.
- 2. Configure secure communication between the adapter and the managed target.
 - a. Configure 1-way authentication.
 - b. Configure 2-way authentication.
- 3. Configure the adapter.
- 4. Modify the adapter profiles.
- 5. Customize the adapter.

Troubleshooting

See the following topics.

- Techniques for troubleshooting problems
- · Configure debugging
- Logs
- · Error messages and problem solving

Uninstallation

Complete these tasks.

- 1. Stop the adapter service.
- 2. Remove the adapter binaries or connector.
- 3. Remove 3rd party client libraries.
- 4. Delete the adapter service/target.
- 5. Delete the adapter profile.

Reference

See the following topics.

- · Adapter attributes and object classes
- · Adapter attributes by operations
- · Special attributes

Prerequisites

Verify that your environment meets the software and hardware requirements for the adapter.

<u>Table 1 on page 7</u> identifies the software and operating system prerequisites for the adapter installation.

Ensure that you install the adapter on the same workstation as the IBM Security Directory Integrator server.

Table 1. Prerequisites to install the adapter		
Prerequisite	Description	
Directory Integrator	• IBM Security Directory Integrator Version 7.1.1 + 7.1.1-TIV-TDI-FP0004 + 7.2.0-ISS-SDI-LA0008	
	• IBM Security Directory Integrator Version 7.2	
	Note:	
	Earlier versions of IBM Security Directory Integrator that are still supported might function properly. However, to resolve any communication errors, you must upgrade your Directory Integrator release to the versions that the adapter officially supports.	
	The adapter supports IBM Security Directory Integrator 7.2, which is available only to customers who have the correct entitlement. Contact your IBM representative to find out whether you have the entitlement to download IBM Security Directory Integrator 7.2.	
Identity server	The following servers are supported:	
	• Identity server Version 10.0	
	• Identity server Version 10.0	
	• IBM Security Privileged Identity Manager Version 2.0	
	Identity server Version 10.0	
Salesforce.com API	Version 31.0	
System Administrator authority	To complete the adapter installation procedure, you must have system administrator authority.	
Security Directory Integrator adapters solution directory	A Security Directory Integrator adapters solution directory is a Security Directory Integrator work directory for adapters.	
	For more information, see the Dispatcher Installation and Configuration Guide.	
A Salesforce.com API user	A Salesforce.com user with API permission for your organization. The user must have a valid user name, password, and security token. For more information about security tokens, see "Resetting Your Security Token" in the Salesforce online help.	

Note: Set the environmental variable CLASSPATH to Java version 1.5 that is required for the adapter installation or upgrade.

For information about the prerequisites and supported operating systems for Security Directory Integrator, see the *IBM Security Directory Integrator 7.0: Administrator Guide*.

Prerequisites to run the connector

The following table lists the requirements to run the Salesforce.com connector.

Table 2. Salesforce.com connector prerequisites		
Requirement	Description	Task
Export and Import the SSL certificate	Export the SSL certificate from the managed resource and import it to the certificate authority (CA) certificates of the Security Directory Integrator Java virtual machine (JVM).	See "Exporting and importing the SSL certificate" on page 11.

Software downloads

Download the software through your account at the IBM Passport Advantage® website.

Go to IBM Passport Advantage.

See the corresponding IBM Security Verify Identity Download Document for instructions.

Note:

You can also obtain additional adapter information from IBM Support.

Installation worksheet

The installation worksheet lists the information that is required to install and configure the adapter. Complete this worksheet before you start the installation procedure for ease of reference. Make a copy of the worksheet for each adapter instance you install.

Table 3. Required information to install the adapter		
Required information	Description	Value
Security Directory Integrator Home Directory	The ITDI_HOME directory contains the jars/connectors subdirectory that contains adapter JAR files. For example, the jars/connectors subdirectory contains the JAR file for the UNIX adapter.	If Security Directory Integrator is automatically installed with your IBM Security Verify Identity product, the default directory path for Security Directory Integrator is as follows:
		Windows:
		• For version 7.0:
		<pre>drive\Program Files \IBM\TDI\V7.0</pre>
		UNIX:
		• For version 7.0:
		/opt/IBM/TDI/V7.0

Table 3. Required information to install the adapter (continued)		
Required information	Description	Value
Adapters solution directory	When you install the dispatcher, the adapter prompts you to specify a file path for the solution directory. For more information about the solution directory, see the Dispatcher Installation and Configuration Guide.	The default solution directory is at: Windows: • For version 7.0: drive\Program Files \IBM\TDI\V7.0\timsol UNIX: • For version 7.0: /opt/IBM/TDI/V7.0/ timsol

Chapter 3. Installing

Installing the adapter mainly involves importing the adapter profile and creating an adapter service. Depending on the adapter, several other tasks can be involved to completely install it.

All IBM Security Directory Integrator based adapters require the Dispatcher for the adapters to function correctly. If the Dispatcher is installed from a previous installation, do not reinstall it unless the Dispatcher is upgraded. See Verifying the adapter installation.

Depending on your adapter, the Security Directory Integrator connector might already be installed as part of the Security Directory Integrator product and no further action is required. If the connector is not preinstalled, install it after the Dispatcher.

Installing the dispatcher

If this is the first Security Directory Integrator-based adapter installation, you must install the RMI Dispatcher before you install the adapter. Install the RMI Dispatcher on the same Security Directory Integrator server where you want to install the adapter.

If you already installed the RMI Dispatcher for another adapter, you do not need to reinstall it.

If you have not yet installed the RMI Dispatcher in the Security Directory Integrator environment, download the Dispatcher installer from the <u>IBM Passport Advantage</u> website. For more information about the installation, see the *Dispatcher Installation and Configuration Guide*.

Exporting and importing the SSL certificate

To enable communication between the Salesforce.com Adapter and the Salesforce.com server, keystores must be configured for the RMI Dispatcher.

Procedure

- Create a keystore that contains the Salesforce.com SSL certificates as trusted certificate entries.
 Use Internet Explorer to download the Salesforce.com server SSL certificate into the Windows certificate store from https://login.salesforce.com/. View the certificate by double-clicking the SSL lock icon. If your browser reports that revocation information is not available, double-click View Certificate.
- Click Certification Path and select the CA Root certificate.
 The Java[™] keytool displays a confirmation that the certificate is added to the keystore.
- 3. Click View Certificate.
- 4. Click the Details tab and navigate to Copy to File using the Base-64 encoded X.509 (.CER) format.
 - If the RMI Dispatcher has the configured keystore, use the **keytool.exe** program to import the Salesforce.com server certificate.
 - If the keystore is not configured, create a keystore. Issue the following command (as one line) from a command prompt:

```
keytool -import -alias salesforce -file c:\salesforce.cer -keystore c:\truststore.jks -storepass passw0rd
```

5. Edit the *IDI_HOME*/timsol/solution.properties file to specify truststore and keystore information.

In the current release, only jks-type is supported:

```
# Keystore file information for the server authentication.
# It is used to verify the server's public key.
# example
javax.net.ssl.trustStore=truststore.jks
```

```
javax.net.ssl.trustStorePassword=passw0rd
javax.net.ssl.trustStoreType=jks
com.ibm.di.SSLProtocols=TLSv1.1,TLSv1.2
```

Note:

- If these key properties are not configured, you can set the truststore to the same value that contains the Salesforce.com server certificate. Otherwise, you must import the Salesforce.com server certificate to the truststore specified in javax.net.ssl.trustStore.
- Salesforce.com no longer supports SSL or TLS 1.0 connections. Salesforce Adapter depends on JVM used by ITDI to handle the connection, and Java 1.6 SR10 is the minimum level that provides TLS 1.1/1.2 support. To configure the adapter to use the higher TLS versions, make sure ITDI is using Java 1.6 SR10 or later.
- 6. Restart the adapter service.

What to do next

For more information about SSL configuration, see the *IBM Security Dispatcher Installation and Configuration Guide*.

Installing the adapter binaries or connector

The connector might or might not be available with the base Security Directory Integrator or Security Directory Integrator product. The connector is required to establish communication between the adapter and the Dispatcher.

Before you begin

• The Dispatcher must be installed.

About this task

If you are updating a previous installation, the adapter you want to update must exist. If it does not exist, the software generates the following message:

```
Adapter is not found at specified location.
Cannot perform Update Installation. Correct
the path of installed adapter or select Full Installation.
```

Procedure

To install the adapter, take the following steps:

- 1. Create a temporary directory on the workstation where you want to install the adapter.
- 2. Extract the contents of the compressed file in the temporary directory.
- 3. Copy the SalesforceConnector.jar file to the ITDI_HOME/jars/connectors directory.
- 4. Copy the sforce_partner.jar file to the ITDI_HOME/jars/patches directory.
- 5. Restart the adapter service.

Verifying the adapter installation

If the adapter is installed correctly, adapter components exist in the specified directory.

Table 4. Adapter component		
Adapter component	Directory	
SalesforceConnector.jar	On the Windows operating system drive:\Program Files\IBM\TDI \V7.0\jars\connectors\ On the UNIX operating system /opt/IBM/TDI/V7.0/jars/connectors/	
sforce_partner.jar	On the Windows operating system drive:\Program Files\IBM\TDI \V7.0\jars\patches\ On the UNIX operating system /opt/IBM/TDI/V7.0/jars/patches/	

Review the installer log file, SalesforceAdapter_Installer.log, that is in the adapter installer directory for any errors.

If this installation is to upgrade a connector, then send a request from IBM Security Verify Identity. Verify that the version number in the ibmdi.log matches the version of the connector that you installed. The ibmdi.log file is in the ITDI_Home\adapter solution directory\logs directory.

Restarting the adapter service

Various installation and configuration tasks might require the adapter to be restarted to apply the changes. For example, you must restart the adapter if there are changes in the adapter profile, connector, or assembly lines. To restart the adapter, restart the Dispatcher.

The adapter does not exist as an independent service or a process. The adapter is added to the Dispatcher instance, which runs all the adapters that are installed on the same Security Directory Integrator instance.

See the topic about starting, stopping, and restarting the Dispatcher service in the *Dispatcher Installation* and Configuration Guide.

Importing the adapter profile

An adapter profile defines the types of resources that the Identity server can manage. It is packaged with the IBM Security Verify Adapter. Use the adapter profile to create an adapter service on Identity server and establish communication with the adapter.

Before you begin

- You have root or administrator authority on the Identity server.
- The file to be imported must be a Java archive (JAR) file. The <a dapter > Profile.jar file includes all the files that are required to define the adapter schema, account form, service/target form, and profile properties. If necessary, you can extract the files from the JAR file, modify the files, and repackage the JAR file with the updated files. The JAR file for IBM Security Identity Manager is located in the top level folder of the installation package.

About this task

Service definition files are also called adapter profile files.

If the adapter profile is not installed correctly, the adapter cannot function correctly. You cannot create a service with the adapter profile or open an account on the service. You must import the adapter profile again.

Procedure

- 1. Log on to the Identity server by using an account that has the authority to perform administrative tasks.
- 2. From the navigation tree, select **Configure System > Manage Service Types**.
 - The **Manage Service Types** page is displayed.
- 3. On the Manage Service Types page, click Import.
 - The **Import Service Type** page is displayed.
- 4. On the **Import Service Type** page, complete these steps:
 - a) In the **Service Definition File** field, type the directory location of the *<Adapter>*Profile.jar file, or click **Browse** to locate the file.
 - For example, if you are installing the IBM Security Verify Adapter for a Windows server that runs Active Directory, locate and import the ADProfileJAR file.
 - b) Click **OK** to import the file.

Results

A message indicates that you successfully submitted a request to import a service type.

What to do next

- The import occurs asynchronously, which means it might take some time for the service type to load
 into the Identity server from the properties files and to be available in other pages. On the Manage
 Service Types page, click Refresh to see the new service type. If the service type status is Failed,
 check the log files to determine why the import failed.
- If you receive a schema-related error, see the trace.log file for information about it. The trace.log file location is specified by the **handler.file.fileDir** property that is defined in the enRoleLogging.properties file. The enRoleLogging.properties file is in the Identity serverHOME\data directory.

Configuring suspend and restore operations

This version of the adapter supports suspension and restoration of Salesforce.com accounts.

About this task

The Salesforce.com Adapter supports Suspend Account and Restore Account operations, which are not enabled by default. The default setting of **Account Operations Settings** in the service form of the adapter is **Disable Suspend/Restore (Accounts cannot be reactivated)**, which does not enable Suspend Account or Restore Account operations.

To successfully suspend an account or restore an account, you must set the service to enable Suspend Account and Restore Account operations. The setting causes the adapter to deactivate or reactivate the account on Salesforce.com.

Note: Enabling the Suspend Account and Restore Account operations causes deleted accounts to reconcile as orphan accounts in the service.

Procedure

1. In the service form, access the **Connection** tab.

- 2. In the Account Operations Settings menu, select Enable Suspend/Restore (Deleted accounts reconciled as orphan accounts).
- 3. Enter the Salesforce.com API user password in the Salesforce API Password field.
- 4. Click **OK** to save the changes.

Creating an adapter service/target

After you import the adapter profile on the Identity server, create a service/target so that Identity server can communicate with the managed resource.

Before you begin

Complete "Importing the adapter profile" on page 13.

About this task

You must create an administrative user account for the adapter on the managed resource. You can provide the account information such as administrator name and password when you create the adapter service. Ensure that the account has sufficient privileges to administer the users. For information about creating an administrative account, see the documentation for the managed resource.

To create or change a service, you must use the service form to provide information for the service. Service forms might vary depending on the adapter. The service name and description that you provide for each service are displayed on the console. Therefore, it is important to provide values that make sense to your users and administrators.

Procedure

1. From the navigation tree, click Manage Services.

The **Select a Service** page is displayed.

2. On the Select a Service page, click Create.

The **Create a Service** wizard is displayed.

3. On the **Select the Type of Service** page, click **Search** to locate a business unit.

The **Business Unit** page is displayed.

- 4. On the **Business Unit** page, complete these steps:
 - a) Type information about the business unit in the **Search information** field.
 - b) Select a business type from the **Search by** list, and then click **Search**.

A list of business units that matches the search criteria is displayed.

If the table contains multiple pages, you can do the following tasks:

- Click the arrow to go to the next page.
- Type the number of the page that you want to view and click Go.
- c) In the **Business Units** table, select business unit in which you want to create the service, and then click **OK**.

The **Select the Type of Service** page is displayed, and the business unit that you specified is displayed in the **Business unit** field.

5. On the **Select the Type of Service** page, select a service type, and then click **Next**.

If the table contains multiple pages, you can do the following tasks:

- Click the arrow to go to the next page.
- Type the number of the page that you want to view and click **Go**.
- 6. On either the **Service Information** or **General Information** page, specify the appropriate values for the service instance.

The content of the **General Information** page depends on the type of service that you are creating. The creation of some services might require more steps.

7. To create a service with NTLM authentication, the administrator login is in the following format:

<Domain Name>\<Login Name>

- 8. For NLTM authentication, select Authentication mode as 'Claims-Based Authentication.
- 9. On the **Dispatcher Attributes** page, specify information about the dispatcher attributes, and then click **Next** or **OK**.
 - The **Dispatcher Attributes** page is displayed only for IBM Security Directory Integrator based services.
- 10. Optional: On the **Access Information** page, select the **Define an Access** check box to activate the access definition fields. Select the type of access you want to enable.
 - Specify the expected access information and any other optional information such as description, search terms, more information, or badges.
- 11. On the **Status and Information** page, view information about the adapter and managed resource, and then click **Next** or **Finish**.
 - The adapter must be running to obtain the information.
- 12. On the Configure Policy page, select a provisioning policy option, and then click Next or Finish.
 - The provisioning policy determines the ownership types available for accounts. The default provisioning policy enables only Individual ownership type accounts. Additional ownership types can be added by creating entitlements on the provisioning policy.
 - **Note:** If you are creating a service for an identity feed, the **Configure Policy** page is not displayed.
- 13. Optional: On the **Reconcile Supporting Data** page, either do an immediate reconciliation for the service, or schedule a supporting data reconciliation, and then click **Finish**.
 - The **Reconcile Supporting Data** page is displayed for all services except for identity feed services.
 - The **supporting data only** reconciliation option retrieves only the supporting data for accounts. The supporting data includes groups that are defined on the service. The type of supporting data is defined in the adapter guide.
- 14. Optional: On the **Service Information** or **General Information** page, click **Test Connection** to validate that the data in the fields is correct, and then click **Next** or **Finish**.
 - If the connection fails, contact the analyst who is responsible for the computer on which the managed resource runs.

Results

A message is displayed, indicating that you successfully created the service instance for a specific service type.

Service/Target form details

Complete the service/target form fields.

Connector Profile

Service Name

Specify a name that defines the adapter service on the Identity server.

Note: Do not use forward (/) or backward slashes (\) in the service name.

Description

Optionally, specify a description that identifies the service for your environment.

Security Directory Integrator location

Specify the URL for the IBM Security Directory Integrator instance. The valid syntax for the URL is rmi://ip-address:port/ITDIDispatcher, where ip-address is the IBM Security Directory Integrator host and port is the port number for the RMI Dispatcher.

The default URL for the default SDI1 instance is rmi://localhost:1099/ITDIDispatcher.

Account Operations Settings

Define the behavior of account deletion and enable or disable the Suspend Account and Restore Account operations:

Enable Suspend/Restore (Deleted accounts are reconciled as orphan accounts.)

Select this option to enable the Suspend and Restore account operations. Suspended users are marked as "Inactive" on Salesforce. At account deletion, the user is marked "Inactive" on Salesforce; however, the adapter reconciles the user back as an Orphan Account.

• Disable Suspend/Restore (Accounts can be reactivated)

Select this option to disable Suspend and Restore account operations. An error is returned when an account under the Salesforce.com Service is submitted for restoration or suspension. Deleted accounts are *not* reconciled. If the account was deleted and is later re-created in Identity server, it is restored from Salesforce.com by marking it as "Active" again.

Disable Suspend/Restore (Accounts cannot be reactivated)

This default option has behavior that is compatible with previous versions of the adapter. Accounts that are deleted cannot be restored. If the account is re-created later, it fails.

Owner

Optionally, specify a user as a service owner.

Service Prerequisite

Optionally, specify a service that is prerequisite to this service.

Connection

Salesforce.com API URL

Specify the URL to access the Salesforce.com API.

The default URL for logging in to the Salesforce.com API Webservices is https://login.salesforce.com/services/Soap/u/version_number. For example, if the API version number is 23.0, specify https://login.salesforce.com/services/Soap/u/23.0 as the login URL.

For more information about login URLs, see "Implementation Considerations" in the Salesforce.com API Developer Guide.

UserName

Specify the user name that is used to log in to the resource and do user management operations on the organization. Make sure that the user has API access privilege on Salesforce.com.

Password

Specify the password for the user.

If a password generator is used when you create or change user passwords, Identity server must generate a password with enough complexity to meet Salesforce.com requirements. If necessary, create a password policy that meets Salesforce.com requirements.

You can also use the Salesforce.com Administration User Interface to modify the Salesforce.com password complexity policy. For information about password policies, see "Setting Password Policies" in the Salesforce.com online help.

Security Token

A unique security token can be generated for the Salesforce.com account that is configured in the adapter.

To generate a new security token for the user to manage the Salesforce.com service, see "Resetting Your Security Token" in the Salesforce.com online help.

To login without a security token in the adapter, specify NONE in the Security Token field on the service form.

Profile for Suspended Users (deprecated)

Specify the name of the profile that is assigned to suspended users on Salesforce.com.

User Fields for Reconciliation

Optionally, specify the fields that are reconciled for users on Salesforce.com. The fields in the list are separated by commas. You must specify Email, Username, LastName, Alias, TimeZoneSidKey, LocaleSidKey, EmailEncodingKey, ProfileId, LanguageLocaleKey, IsActive, Id. You can specify more fields. However, the reconciliation performance might be affected. If you leave this field blank, all fields are reconciled by default.

Dispatcher Attributes:

Disable AL Caching

Select the check box to disable the assembly line caching in the dispatcher for the service. The assembly lines for add, modify, delete, and test operations are not cached.

AL FileSystem Path

Specify the file path from where the dispatcher loads the assembly lines. If you do not specify a file path, the dispatcher loads the assembly lines that are received from Identity server. For example, you can specify the following file path to load the assembly lines from the profiles directory of the Windows operating system: c:\Program Files\IBM\TDI\V7.0\profiles or you can specify the following file path to load the assembly lines from the profiles directory of the UNIX and Linux® operating: system:/opt/IBM/TDI/V7.0/profiles

Max Connection Count

Specify the maximum number of assembly lines that the dispatcher can run simultaneously for the service. For example, enter 10 when you want the dispatcher to run maximum 10 assembly lines simultaneously for the service. If you enter 0 in the **Max Connection Count** field, the dispatcher does not limit the number of assembly lines that are run simultaneously for the service.

Status and information

Contains read only information about the adapter and managed resource. These fields are examples. The actual fields vary depending on the type of adapter and how the service form is configured. The adapter must be running to obtain the information. Click **Test Connection** to populate the fields.

Last status update: Date

Specifies the most recent date when the Status and information tab was updated.

Last status update: Time

Specifies the most recent time of the date when the Status and information tab was updated.

Managed resource status

Specifies the status of the managed resource to which the adapter is connected.

Adapter version

Specifies the version of the adapter that the service uses to provision request to the managed resource.

Profile version

Specifies the version of the profile that is installed in the Identity server.

TDI version

Specifies the version of the Security Directory Integrator on which the adapter is deployed.

Dispatcher version

Specifies the version of the Dispatcher.

Installation platform

Specifies summary information about the operating system where the adapter is installed.

Adapter account

Specifies the account that is running the adapter binary file.

Adapter up time: Date

Specifies the date when the adapter started.

Adapter up time: Time

Specifies the time of the date when the adapter started.

Adapter memory usage

Specifies the memory usage for running the adapter.

If the connection fails, follow the instructions in the error message. Also:

- Verify the adapter log to ensure that the test request was successfully sent to the adapter.
- Verify the adapter configuration information.
- Verify service parameters for the adapter profile. For example, verify the work station name or the IP address of the managed resource and the port.

Installing the adapter language package

The adapters use a separate language package from IBM Security Verify Identity.

See Installing the adapter language pack from the IBM Security Verify Identity product documentation.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Procedure

- 1. Test the connection for the service that you created on the Identity server.
- 2. Run a full reconciliation from the Identity server.
- 3. Run all supported operations such as add, modify, and delete on one user account.
- 4. Verify the ibmdi.log file after each operation to ensure that no errors are reported.
- 5. Verify the trace.log file to ensure that no errors are reported when you run an adapter operation.

Permissions for the /tmp directory

The permissions for the /tmp directory on the managed resource must be set to 777 when you do the reconciliation operation by using the sudo user.

Chapter 4. Upgrading

Upgrading an IBM Security Directory Integrator-based adapter involves tasks such as upgrading the dispatcher, the connector, and the adapter profile. Depending on the adapter, some of these tasks might not be applicable. Other tasks might also be required to complete the upgrade.

To verify the required version of these adapter components, see the adapter release notes.

Upgrading the adapter binaries or connector

Before you upgrade the connector, verify the version of the connector.

- If the connector version is higher or same as the previous version, the installer installs the new connector.
- If the connector version is lower than the existing connector version, the installer does not install the connector. A message is displayed indicating that no upgrade is required.

Note: Stop the dispatcher service before the upgrading the connector and start it again after the upgrade is complete.

Upgrading the adapter profile

Read the adapter Release Notes® for any specific instructions before you import a new adapter profile.

Note: Restart the Dispatcher service after importing the profile. Restarting the Dispatcher clears the assembly lines cache and ensures that the dispatcher runs the assembly lines from the updated adapter profile.

Chapter 5. Configuring

After you install the adapter, configure it to function correctly. Configuration is based on your requirements or preference.

See the IBM Security Dispatcher Installation and Configuration Guide for more configuration options such as:

- · JVM properties
- · Dispatcher filtering
- · Dispatcher properties
- · Dispatcher port number
- Logging configurations
- Secure Sockets Layer (SSL) communication

Customized attributes

Use these tasks to configure the Salesforce.com Adapter to support customized Salesforce.com attributes.

Salesforce.com supports custom fields for the user object. However, the Salesforce.com Adapter supports only the standard set of attributes.

You can customize the adapter to support custom attributes. Complete the following tasks to customize the Salesforce.com Adapter to support custom fields in Salesforce.com.

Salesforce.com custom user attributes, such as multi-select picklists can be configured to store multiple values in a single field. The adapter supports multi-value custom attributes. To configure the adapter to support fields with multiple values, perform the following steps:

- 1. Add the custom attribute as per the Installation and Configuration Guide. After installation, click **Adapter configuration > Customized attributes**.
- 2. When updating the schema.dsml file, ensure that attribute-type single-value="false".
- 3. In the service.def file, locate the section coperation cn="sfModify">. Add a child element to
 the operation with the following format <replaceMultiValue
 name="custom_mutlivalue_attribute_name" /> and replace the text
 custom_multivalue_attribute_name inside the quotes with the name of the custom attribute
 specified in schema.dsml.
- 4. To add the field into the Service's Account Form, edit the form in the Form Designer. Typically, the attribute type to handle a multi-select picklist in the Form Designer would be a ListBox. However, you may choose any controls that support multiple values. For more information about modifying the adapter form, see the IBM Security Verify Identity product documentation.

Note: It is recommended to populate the values of the control in the Form Designer to correspond to those specified in the custom field on Salesforce.com.

Related concepts

Modification of the maximum length of the account form attributes

When you want to modify the maximum length of the attributes on the account form, modify the schema.dsml file with their required length.

Related tasks

Editing Salesforce adapter profiles on the UNIX or Linux operating system

The adapter profile .jar file might contain ASCII files that are created by using the MS-DOS ASCII format.

Creating a JAR file and importing the profile

After you modify the schema.dsml or any other profile files, you must import these files, into IBM Security Verify Identity for the changes to take effect.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

For more information about adding new attributes to the Salesforce.com User schema, see the Salesforce.com documentation.

The Salesforce.com Adapter supports the following types of custom attributes:

- Boolean
- Integer
- Case-sensitive string
- · Not case-sensitive string
- · Coordinated Universal Time (UTC) coded time

Prefix the attribute names with erSF to easily identify the attributes that are used with IBM Security Verify Identity.

Note:

- If Security Directory Server is being used as the directory server application, the name of the attribute must be unique within the first 16 characters.
- The Salesforce.com Adapter supports a multi-line value for custom attributes with string syntax.
- The custom attributes are supported for User account class only.

Related concepts

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server

You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Copying the SalesforceProfile. jar file and extracting the files

Use these tasks to customize your environment.

About this task

The profile JAR file, SalesforceProfile.jar, is included in the Salesforce.com Adapter compressed file that you downloaded from the IBM website. The SalesforceProfile.jar file contains a folder named **SalesforceProfile** with the following files:

- CustomLabels.properties
- erSalesforceAccount.xml
- erSalesforceService.xml
- schema.dsml
- service.def
- sforceAdd.xml
- sforceChangePassword.xml
- sforceDelete.xml
- sforceModify.xml
- sforceRecon.xml
- sforceRestore.xml
- sforceSuspend.xml
- sforceTest.xml

You can modify these files to customize your environment. When you finish updating the profile JAR file, rebuild the JAR file and install it on the Identity server. For more information about the profile installation, see *Importing the adapter profile*.

Procedure

- 1. Log in to the system where the Salesforce.com Adapter is installed.
- 2. On the **Start** menu, click **Programs > Accessories > Command Prompt**.
- 3. Copy the SalesforceProfile.jar file into a temporary directory.
- 4. Extract the contents of `the SalesforceProfile.jar file into the temporary directory. Run the following commands:

```
cd c:\temp
jar -xvf SalesforceProfile.jar
```

The **jar** command creates the c:\temp\SalesforceProfile directory.

What to do next

Edit the appropriate files by completing the following tasks.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

About this task

The Salesforce.com Adapter uses Security Directory Integrator to process requests before you submit them to Salesforce.com.

The Salesforce.com assembly lines contain mapping instructions from a IBM Security Verify Identity request to Salesforce.com. Modify the assembly lines to add new mappings for custom attributes.

Procedure

- 1. Start the Security Directory Integrator Configuration Editor.
- 2. Open the sforceAdd.xml file. Click File > Open Security Directory Integrator Configuration File....
 - a) Browse to the SalesforceProfile directory.
 - b) Select the sforceAdd.xml file.
- 3. Optional: If previously edited, assign this configuration file to an existing project. Otherwise, proceed to the next screen to create a project and name it SalesforceProfile.
- 4. After the file is imported, expand the project to display the **AssemblyLines** tree in the Navigator pane.
- 5. Right click **sfAdd assemblyline** and select **Open**. The **Add assemblyline** configuration is displayed in the main panel.
- 6. Click **Show Mapping** in the main panel. The mapping table for the assembly line is displayed in the main panel.
- 7. Locate the **AddUser** section and left click to select it in the table.
- 8. Click Map to display the Add attribute dialog.
- 9. Enter the name of the custom field exactly as displayed in the API Name on Salesforce.com. For example, Custom1__c.
- 10. After the field is added, locate it in the mapping table and double-click the corresponding row to display an edit dialog.
- 11. Change the default value of work. [custom field name] to work. [custom attribute name]. For example, change work. Custom1__c to work.erSFCustom1__c.
- 12. Save the changes. Click **File** > **Save**.

- 13. Right click the project in the Navigator pane and select the **Export...** option to export the new assembly line.
- 14. In the first screen of the **Export** dialog, expand the IBM Security Directory Integrator folder and select **Runtime Configuration**.
- 15. Click Next.
- 16. In the file path field, browse to the SalesforceProfile directory and select the file with the same name from step 2 to overwrite it.
- 17. Click Finish.
- 18. Repeat the steps 5 through 17 for the Modify assembly line.
- 19. Repeat steps 5 through 17 for the Recon assembly line and do the following steps instead of steps 10 and 11:
 - a) Locate the field in the mapping table and click the **Work Attribute** cell corresponding to the custom field to rename it.
 - b) Enter the attribute name that is specified previously in step 11. For example, erSFCustom1__c.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

About this task

For more information about the attributes in this file, see "The schema.dsml file" on page 41.

Procedure

- 1. Locate the schema.dsml file in the \SalesforceProfile directory.
- 2. Edit the schema.dsml file to add an attribute definition for each custom attribute.

The Object Identifier (OID) is increased by 1, based on the last entry in the file.

For example, if the last attribute in the file uses the OID 1.3.6.1.4.1.6054.3.162.2.85, the first new attribute uses the OID 1.3.6.1.4.1.6054.3.162.2.86.

You might want to start a new range of numbers for your custom attributes. For example, start custom attributes with OID 1.3.6.1.4.1.6054.3.162.2.1000. This range prevents duplicate OIDs if the adapter is upgraded to support new attributes that are standard for newer versions of Salesforce.com API.

3. Add each of the new attributes to the account class.

For example, add the following attribute definition under the erSalesforceAccount section of the schema.dsml file:

```
<attribute ref="erSFCustom1__c" required="false"/>
```

4. Save the file when you are finished.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

About this task

The attributes are displayed in the attribute list for the account form. You can modify the attribute names that are in the attribute list. See "CustomLabels.properties file" on page 43.

To add the attribute and its corresponding label to the CustomLabels.properties file, complete the following steps:

Procedure

- 1. Locate the CustomLabels.properties file in the \SalesforceProfile directory.
- 2. Edit the CustomLabels.properties file to add the attribute and its corresponding label. Use the following format:

```
attribute=label
```

Note: The attribute name must be in lowercase. For example:

```
# Adapter Labels definitions #
```

```
ersfcustom1__c=Custom Field One
ersfcustom2__c=Custom Attribute Field Two
```

3. Save the file when you are finished.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server

You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Procedure

1. Create a JAR file by using the files in the \temp directory.

Run the following commands:

```
cd c:\temp
jar -cvf SalesforceProfile.jar SalesforceProfile
```

2. Import the SalesforceProfile.jar file into the Identity server.

For more information about importing the file, see Importing the adapter profile.

3. Start and stop the Identity server.

Note: If you are upgrading an existing adapter profile, the new adapter profile schema is not reflected immediately. You must stop and start the Identity server to refresh the cache and the adapter schema. See Chapter 4, "Upgrading," on page 21.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Adapter form modification (optional)

After the changes are available in the Identity server, you can modify the Salesforce.com Adapter forms to use the new custom attributes.

You do not have to add the attributes to the Salesforce.com Adapter form unless you want them to be available. The attributes are returned during reconciliations unless you explicitly exclude them.

For more information about modifying the adapter form, see the IBM Security Verify Identity product documentation.

Related concepts

Schema extensions and custom attributes

Use the interface and tools that are provided by Salesforce.com to extend the Salesforce.com User schema and add the custom attributes.

Related tasks

Copying the SalesforceProfile.jar file and extracting the files

Use these tasks to customize your environment.

Modifying the assembly lines

Use this task to add new mappings to the assembly lines for custom attributes.

Updating the schema.dsml file

The Salesforce.com Adapter schema.dsml file identifies all of the standard User account attributes. Modify this file to identify new custom attributes.

Modifying the CustomLabels.properties file

After you add the custom attributes to the schema.dsml file, the attributes are available for use on the Salesforce.com Adapter form.

Creating a JAR file and installing the new attributes on the IBM Security Verify Identity server

You must import the modified assembly lines, schema.dsml, CustomLabels.properties, and any other files in the profile that were modified for the adapter. The changes do not take effect until after the files are imported into the Identity server.

Editing Salesforce adapter profiles on the UNIX or Linux operating system

The adapter profile .jar file might contain ASCII files that are created by using the MS-DOS ASCII format.

About this task

If you edit an MS-DOS ASCII file on the UNIX operating system, you might see a character ^M at the end of each line. These characters indicate new lines of text in MS-DOS. The characters can interfere with the running of the file on UNIX or Linux systems. You can use tools, such as **dos2unix**, to remove the ^M characters. You can also use text editors, such as the **vi** editor, to remove the characters manually.

Example

You can use the **vi** editor to remove the ^M characters. From the **vi** command mode, run the following command and press Enter:

```
:%s/^M//g
```

When you use this command, enter ^M or Ctrl-M by pressing ^v^M or Ctrl V Ctrl M sequentially. The ^v instructs the vi editor to use the next keystroke instead of issuing it as a command.

Related concepts

Customized attributes

Use these tasks to configure the Salesforce.com Adapter to support customized Salesforce.com attributes.

Modification of the maximum length of the account form attributes

When you want to modify the maximum length of the attributes on the account form, modify the schema.dsml file with their required length.

Related tasks

Creating a JAR file and importing the profile

After you modify the schema.dsml or any other profile files, you must import these files, into IBM Security Verify Identity for the changes to take effect.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Modification of the maximum length of the account form attributes

When you want to modify the maximum length of the attributes on the account form, modify the schema.dsml file with their required length.

For example, when you want 2048 as the maximum length of the **First Name** attribute, modify the schema.dsml file as:

Related concepts

Customized attributes

Use these tasks to configure the Salesforce.com Adapter to support customized Salesforce.com attributes.

Related tasks

Editing Salesforce adapter profiles on the UNIX or Linux operating system

The adapter profile .jar file might contain ASCII files that are created by using the MS-DOS ASCII format.

Creating a JAR file and importing the profile

After you modify the schema.dsml or any other profile files, you must import these files, into IBM Security Verify Identity for the changes to take effect.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Creating a JAR file and importing the profile

After you modify the schema.dsml or any other profile files, you must import these files, into IBM Security Verify Identity for the changes to take effect.

About this task

Note: If you are upgrading an existing adapter profile, the new adapter profile schema is not reflected immediately. You must stop and start the Identity server to refresh the cache and the adapter schema. For more information about upgrading an existing adapter, see Chapter 4, "Upgrading," on page 21.

Procedure

1. Extract the contents of the SalesforceProfile.jar file into the temporary directory by running the following command:

```
cd c:\temp
jar -xvf SalesforceProfile.jar
```

The **jar** command creates the *c*:\temp\SalesforceProfile directory.

- 2. Update the profile files.
- 3. Create a JAR file with the files in the \temp directory by running the following commands:

```
cd c:\temp
jar -cvf SalesforceProfile.jar SalesforceProfile
```

- 4. Import the SalesforceProfile.jar file into the Identity server.
- 5. Stop and start the Identity server.

Related concepts

Customized attributes

Use these tasks to configure the Salesforce.com Adapter to support customized Salesforce.com attributes.

Modification of the maximum length of the account form attributes

When you want to modify the maximum length of the attributes on the account form, modify the schema.dsml file with their required length.

Related tasks

Editing Salesforce adapter profiles on the UNIX or Linux operating system

The adapter profile .jar file might contain ASCII files that are created by using the MS-DOS ASCII format.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Verifying that the adapter is working correctly

After you install and configure the adapter, verify that the installation and configuration are correct.

Procedure

- 1. Test the connection for the service that you created on IBM Security Verify Identity.
- 2. Do a full reconciliation from IBM Security Verify Identity.
- 3. Perform all supported operations on one user account.

Do these steps when you verify the suspend and restore operations, if it is configured on the service form.

- a) Suspend the account.
- b) Verify that the account is disabled by checking the user's **IsActive** status on Salesforce.com.
- c) Restore the account.
- d) Verify that the account is enabled by checking the user's **IsActive** status on Salesforce.com.
- 4. Verify the ibmdi.log file after each operation to ensure that no errors are reported.
- 5. Verify the trace.log file to ensure that no errors are reported when you run an adapter operation.

Related concepts

Customized attributes

Use these tasks to configure the Salesforce.com Adapter to support customized Salesforce.com

Modification of the maximum length of the account form attributes

When you want to modify the maximum length of the attributes on the account form, modify the schema.dsml file with their required length.

Related tasks

Editing Salesforce adapter profiles on the UNIX or Linux operating system

The adapter profile .jar file might contain ASCII files that are created by using the MS-DOS ASCII format.

Creating a JAR file and importing the profile

After you modify the schema.dsml or any other profile files, you must import these files, into IBM Security Verify Identity for the changes to take effect.

Chapter 6. Troubleshooting

Troubleshooting is a systematic approach to solving a problem. The goal of troubleshooting is to determine why something does not work as expected and how to resolve the problem. This topic provides information and techniques for identifying and resolving problems that are related to the adapter, including troubleshooting errors that might occur during the adapter installation.

Techniques for troubleshooting problems

Certain common techniques can help with the task of troubleshooting. The first step in the troubleshooting process is to describe the problem completely.

Problem descriptions help you and the IBM technical-support representative find the cause of the problem. This step includes asking yourself basic questions:

- What are the symptoms of the problem?
- · Where does the problem occur?
- When does the problem occur?
- Under which conditions does the problem occur?
- Can the problem be reproduced?

The answers to these questions typically lead to a good description of the problem, which can then lead you to a problem resolution.

What are the symptoms of the problem?

When you start to describe a problem, the most obvious question is "What is the problem?" This question might seem straightforward; however, you can break it down into several more-focused questions that create a more descriptive picture of the problem. These questions can include:

- Who, or what, is reporting the problem?
- · What are the error codes and messages?
- How does the system fail? For example, is it a loop, hang, crash, performance degradation, or incorrect result?

Where does the problem occur?

Determining where the problem originates is not always easy, but it is one of the most important steps in resolving a problem. Many layers of technology can exist between the reporting and failing components. Networks, disks, and drivers are only a few of the components to consider when you are investigating problems.

The following questions help you to focus on where the problem occurs to isolate the problem layer:

- Is the problem specific to one operating system, or is it common across multiple operating systems?
- Is the current environment and configuration supported?
- Do all users have the problem?
- (For multi-site installations.) Do all sites have the problem?

If one layer reports the problem, the problem does not necessarily originate in that layer. Part of identifying where a problem originates is understanding the environment in which it exists. Take some time to completely describe the problem environment, including the operating system and version, all corresponding software and versions, and hardware information. Confirm that you are running within an environment that is a supported configuration. Many problems can be traced back to incompatible levels of software that are not intended to run together or are not fully tested together.

When does the problem occur?

Develop a detailed timeline of events that lead up to a failure, especially for those cases that are one-time occurrences. You can most easily develop a timeline by working backward: Start at the time an error was reported (as precisely as possible, even down to the millisecond), and work backward through the available logs and information. Typically, you use the first suspicious event that you find in a diagnostic log.

To develop a detailed timeline of events, answer these questions:

- Does the problem happen only at a certain time of day or night?
- How often does the problem happen?
- What sequence of events leads up to the time that the problem is reported?
- Does the problem happen after an environment change, such as upgrading or installing software or hardware?

Responding to these types of questions can give you a frame of reference in which to investigate the problem.

Under which conditions does the problem occur?

Knowing which systems and applications are running at the time that a problem occurs is an important part of troubleshooting. These questions about your environment can help you to identify the root cause of the problem:

- Does the problem always occur when the same task is being done?
- Is a certain sequence of events required for the problem to occur?
- Do any other applications fail at the same time?

Answering these types of questions can help you explain the environment in which the problem occurs and correlate any dependencies. Remember that just because multiple problems might occur around the same time, the problems are not necessarily related.

Can the problem be reproduced?

From a troubleshooting standpoint, the ideal problem is one that can be reproduced. Typically, when a problem can be reproduced you have a larger set of tools or procedures at your disposal to help you investigate. Problems that you can reproduce are often easier to debug and solve.

However, problems that you can reproduce can have a disadvantage: If the problem is of significant business impact, you do not want it to recur. If possible, re-create the problem in a test or development environment, which typically offers you more flexibility and control during your investigation.

- Can the problem be re-created on a test system?
- Do multiple users or applications have the same type of problem?
- Can the problem be re-created by running a single command, a set of commands, or a particular application?

Related concepts

Known behaviors and limitations

The following behaviors and limitations are known to exist in the operation of the Salesforce.com Adapter.

Known behaviors and limitations

The following behaviors and limitations are known to exist in the operation of the Salesforce.com Adapter.

Email address change of a Salesforce user

When IBM Security Verify Identity changes an email address for a Salesforce.com account, it updates the email address in its directory store as soon as the request is successfully sent to Salesforce.com. However, the change is not immediately reflected in Salesforce.com. Salesforce.com requires users to verify the email address change request at the inbox of the new email address. Therefore, a period exists when IBM Security Verify Identity contains the updated email address, while Salesforce.com contains the old email address. During this period, one of these behaviors can occur:

The email address is verified by the user.

The email address is synchronized between IBM Security Verify Identity and Salesforce.com. No further action is needed.

The email address is not verified by the user.

The email address in IBM Security Verify Identity reverts to the old email address at the next reconciliation operation.

The user verifies that the email address after reconciliation occurs.

IBM Security Verify Identity reverts to the old email address with the reconciliation operation. Salesforce.com updates IBM Security Verify Identity with the new email address at the next reconciliation operation.

Set up a reconciliation policy with sufficient frequency to help keep email addresses consistent between Salesforce.com and IBM Security Verify Identity.

Account deletion from the Salesforce.com Service

Salesforce.com does not delete users. Therefore, the Salesforce.com Adapter marks a user account as Inactive when it receives a request to delete the account from IBM Security Verify Identity. If a Salesforce.com administrator reactivates a user from the Salesforce.com user interface, the user is returned as an orphan account at the next reconciliation.

Timeout issues

A network socket timeout might occur if the Salesforce.com connector is unable to complete a network-related operation with the Salesforce.com server within the timeout period specified. The timeout period can be affected by many settings:

- · Adapter configuration
- Identity server configuration
- Dispatcher configuration
- Java VM configuration
- · Operating system configuration
- Network equipment configuration such as switches or firewalls.

Refer to the corresponding documentation for the default settings of the vendors.

To resolve timeout issues that are related to the Salesforce.com Adapter:

• Edit the default socket timeout value for the Salesforce.com connector in the service.def file. Change the **SFSocketTimeout** value. By default, it is set to 600 seconds or 10 minutes. This setting corresponds to the default Dispatcher **SearchALUnusedTimeout** setting. Increase both of these values, if the reconciliation operation takes longer than 10 minutes. See the Dispatcher documentation for instructions about setting the **SearchALUnusedTimeout** value.

• The adapter might timeout when it communicates with Salesforce.com because of network issues. To have the connector reestablish a connection to the Salesforce.com server and try the operation again, edit the ITDI_HOME\timsol\etc\reconnect.rules file. Add the line:

```
com.ibm.di.connector.salesforce.SalesforceConnector:
:com.ibm.di.connector.salesforce.SalesforceConnector
Exception:reconnect:
```

The line is a generic rule for the connector to reconnect when any exception is encountered.

Session handling

You might receive an INVALID_SESSION_ID exception that is logged in your Security Directory Integrator logs. When an INVALID_SESSION_ID exception is encountered, the connector automatically tries to establish a new connection to Salesforce.com before it tries the API call again. Otherwise, a failure might occur because of a timeout in the session.

You can ignore INVALID_SESSION_ID warnings that are followed immediately by logs that display RECOVERING FROM INVALID SESSION ID.

Login Rate Exceeded error

Salesforce.com has a default limit for the number of login attempts per hour.

To address this limit, the adapter is designed to use *sessionID* to authenticate operations after first login. You must enable **Assembly Line Caching**. Otherwise, if you perform operations that exceed 3600 within an hour, you might see a Login Rate Exceeded error from Salesforce.com.

To enable Assembly Line Caching:

- Select **Enable AL Caching** on the service form.
- Verify that the AL Caching is enabled in the dispatcher setting.
- Verify the itim_listener.properties in the *TDI* folder and ensure that the **ALCacheSize** value is set to greater than 0. For example, 100.
- Restart the dispatcher service to apply the changes.

Related concepts

Techniques for troubleshooting problems

Certain common techniques can help with the task of troubleshooting. The first step in the troubleshooting process is to describe the problem completely.

Chapter 7. Uninstalling

To remove an adapter from the Identity server for any reason, you must remove all the components that were added during installation. Uninstalling an IBM Security Directory Integrator based adapter mainly involves removing the connector file, and the adapter profile from the Identity server. Depending on the adapter, some of these tasks might not be applicable, or there can be other tasks.

Removing the adapter binaries or connector

The Salesforce.com Adapter installation installs the Security Directory Integrator Salesforce.com connector.

About this task

To uninstall the Dispatcher, see the Dispatcher Installation and Configuration Guide.

Procedure

- 1. Stop the Dispatcher service.
- 2. Remove the SalesforceConnector.jar file from ITDI_HOME/jars/connectors directory.
- 3. Start the Dispatcher service.

Deleting the adapter profile

Remove the adapter service/target type from the Identity server. Before you delete the adapter profile, ensure that no objects exist on the Identity server that reference the adapter profile.

Objects on the Identity server that can reference the adapter profile:

- · Adapter service instances
- Policies referencing an adapter instance or the profile
- Accounts

Note: The Dispatcher component must be installed on your system for adapters to function correctly in a Security Directory Integrator environment. When you delete the adapter profile, do not uninstall the Dispatcher.

For specific information about how to delete the adapter profile, see the IBM Security Verify Identity product documentation.

Chapter 8. Reference

Reference information is organized to help you locate particular facts quickly, such as adapter attributes, registry settings, and environment variables.

Files

You can configure several adapter-specific files that are associated with the Salesforce.com adapter.

- "The schema.dsml file" on page 41
- "CustomLabels.properties file" on page 43

The schema.dsml file

The schema.dsml file contains all of the attributes that are common to all adapters. This common file also contains Identity server attributes that can be used by any adapter. The schema.dsml file defines all of the classes that are used by the adapter. The classes are used to declare accounts, services, and supporting data.

The schema.dsml file defines the attributes and objects that the adapter supports and uses to communicate with the Identity server. All attributes must be unique. Therefore, they are assigned an object identifier (OID).

The OID is defined with the <object-identifier>...</object-identifier>

The schema.dsml file has the following format:

```
SCHEMA.DSML File
<?xml version="1.0" encoding="UTF-8"?>
<dsml>
<directory-schema>
<!-- eraSFString1-->
<attribute-type single-value="true">
<name>erSFString1</name>
<description/>
<object-identifier>1.3.6.1.4.1.6054.3.162.2.100/object-identifier>
<syntax>1.3.6.1.4.1.1466.115.121.1.15
</attribute-type>
<!-- erSFInteger-->
<attribute-type single-value="true">
<name>erSFInteger</name>
<description/>
<object-identifier>1.3.6.1.4.1.6054.3.162.2.101/object-identifier>
<syntax>1.3.6.1.4.1.1466.115.121.1.27</syntax>
</attribute-type>
<!-- erSFDate-->
<attribute-type single-value="true">
<name>erSFDate</name>
<description/>
<object-identifier>1.3.6.1.4.1.6054.3.162.2.102/object-identifier>
<syntax>1.3.6.1.4.1.1466.115.121.1.24
</attribute-type>
<attribute-type single-value="true">
<name>erSFBoolean</name>
<description/>
<object-identifier>1.3.6.1.4.1.6054.3.162.2.103/object-identifier>
<syntax>1.3.6.1.4.1.1466.115.121.1.7</syntax>
```

```
</attribute-type>
<!-- *********************************
<!-- erSFMultiValueString-->
<attribute-type>
<name>erSFMultiValueString</name>
<description>List of string values</description>
<object-identifier>1.3.6.1.4.1.6054.3.162.2.104</object-identifier>
<syntax>1.3.6.1.4.1.1466.115.121.1.15/syntax>
</attribute-type> ...
<!-- erSalesforceAccount Class -->
<class superior="top">
<name>erSalesforceAccount</name>
<description>Class representing a Salesforce account.</description>
<object-identifier>1.3.6.1.4.1.6054.3.162.1.1</object-identifier> ...
<attribute ref="erSFBoolean" required="false"/>
<attribute ref="erSFDate" required="false"/>
<attribute ref="erSFInteger" required="false"/>
<attribute ref="erSFMultiValueString" required="false"/>
<attribute ref="erSFString1" required="false"/>
</class> ..
</directory-schema>
</dsml>
```

Object identifier

The Identity server uses LDAP directory services to add, delete, modify, and search IBM Security Verify Identity data. Each data item in an LDAP directory server must have a unique object identifier (OID). Therefore, each attribute and class that is defined in the schema.dsml file in IBM Security Verify Identity has an OID.

OIDs have the following syntax:

```
enterprise ID.product ID.adapter ID.object ID.instance ID
```

- The enterprise ID is always 1.3.6.1.4.1.6054 for IBM.
- The product ID is always 3 because these schema.dsml files are used with adapters.
- The adapter ID is 161 for the Salesforce.com Adapter.
- The *object ID* is 2. An attribute uses 2 as the object ID.
- The *instance ID* is a sequential number of the object.

Attribute definition

Before you define unique attributes for the adapter, ensure that the attribute does not exist in the common schema.dsml file.

The following example defines an attribute:

Comment lines are denoted by the <!-- ... --> markers

The attribute type is defined as single-value or multi-value. A single-value attribute is denoted by the line: <attribute-type single-value ="true">. To denote a multi-valued attribute, change the true value to false.

The name of the attribute that is used by the Identity server is defined in the schema. To simplify the tracking of new Salesforce.com adapter attributes, use erSF as the preface for all new attributes.

The description of the attribute is denoted by the line: <description>...</description> tag.

The OID is defined by the <object-identifier>...</object-identifier> tag. Because OIDs are already assigned to the existing, standard attributes, the OID can be copied from the last attribute in the list. However, the last number must be incremented by one for each new attribute that you add to the schema.dsml file.

The data type is defined with the <syntax>...</syntax> tag. The following table lists various data types and the value you specify in the syntax tags.

Table 5. Syntax tag data types and values				
Data type	Value			
Bit string	1.3.6.1.4.1.1466.115.121.1.6			
Boolean	1.3.6.1.4.1.1466.115.121.1.7			
Directory string	1.3.6.1.4.1.1466.115.121.1.15			
UTC coded time	1.3.6.1.4.1.1466.115.121.1.24			
Integer	1.3.6.1.4.1.1466.115.121.1.27			

Classes

At least one account class and one service class must be defined in the schema.dsml file.

Each class requires at least one attribute to identify the class: a name attribute. More attributes might be required depending on the class that is defined.

The following syntax defines a class:

```
<class superior="top">
<name> ... </name>
<description> ... </description>
<object-identifier> ... </object-identifier>
<attribute ref = "..." required = "true" />
<attribute ref = "..." required = "true" />
</class>
```

To make an attribute optional for a class, change required = "true" to required = "false" in the <attribute ref> tag.

An account class defines the attributes that are used to describe an account. An account class must be defined in the schema.dsml file.

The following example defines an account class:

```
<class superior="top" >
<name>erSampleAccount</name>
<description>Sample Account</description>
<object-identifier>1.3.6.1.4.1.6054.3.125.1.101</object-identifier>
<attribute ref = "eruid" required = "true" />
<attribute ref = "erAccountStatus" required = "false" />
<attribute ref = "erSampleGroups" required = "false" />
<attribute ref = "erSampleHome" required = "false" />
<attribute ref = "erSampleDesc" required = "false" />
<attribute ref = "erSampleDesc" required = "false" />
<attribute ref = "erPassword" required = "false" />
</class>
```

In the preceding example, the class name is erSampleAccount and the only required attribute is eruid. However, erAccountStatus is a required attribute to suspend or restore accounts.

CustomLabels.properties file

The CustomLabels.properties file is a text file that defines the labels on the form for the adapter. Use this syntax for the information in the file:

attribute=text

where:

- attribute is the same attribute that is defined in the schema.dsml file.
- text is the label that is on the form in the IBM Security Verify Identity user interface for the account.

The value of attribute must be in lowercase. This requirement is from the Identity server.

Adapter attributes

The Identity server communicates with the adapter by using attributes, which are included in transmission packets that are sent over a network.

As part of the adapter implementation, a dedicated account for IBM Security Verify Identity to access the Salesforce.com is created on the Salesforce.com. The adapter consists of files and directories that are owned by the IBM Security Verify Identity account. These files establish communication with the Identity server.

Attribute descriptions

The Identity server communicates with the Salesforce.com Adapter with attributes that are included in transmission packets that are sent over a network.

The combination of attributes, included in the packets, depends on the type of action that the Identity server requests from the Salesforce.com Adapter.

<u>Table 6 on page 44</u> lists the attributes that are used by the Salesforce.com Adapter. The table provides a description and the corresponding values of the attribute.

Use this key for the permissions column.

```
R = Read only
RW = Add, read, modify, write
AR = Add, Read
```

Table 6. Attributes for the erSFAccount object class	ss				
Attribute name and definition	Data type	Single- valued	Permissions	Required	Description
erSFaboutMe	String	Yes	RW	No	
erSFaccountId	String	Yes	R	No	
erSFalias	String	Yes	RW	Yes	
erSFcallCenterId	String	Yes	RW	No	
erSFcity	String	Yes	RW	No	
erSFcommunityNickname	String	Yes	RW	No	
erSFcompanyName	String	Yes	RW	No	
erSFcontactId	String	Yes	RW	No	
erSFcountry	String	Yes	RW	No	
erSFcountryCode	Picklist	Yes	RW	No	
erSFcreatedById	String	Yes	R	No	
erSFcreatedDate	Datetime	Yes	R	No	Displays current time if Salesforce returns null for the attribute
erSFcurrentStatus	String	Yes	RW	No	
erSFdefaultCurrencyIsoCode	Picklist	Yes	RW	No	

Table 6. Attributes for the erSFAccount object class (continued)					
erSFdefaultDivision	Picklist	Yes	RW	No	
erSFdelegatedApproverId	String	Yes	RW	No	
erSFdepartment	String	Yes	RW	No	
erSFdigestFrequency	Picklist	Yes	RW	No	
erSFdivision	String	Yes	RW	No	
erSFemail	String	Yes	RW	Yes	
erSFemailEncodingKey	String	Yes	RW	Yes	
erSFEmailPreferencesAutoBcc	Boolean	Yes	RW	No	
erSFEmailPreferencesAutoBccStayInTouch	Boolean	Yes	RW	No	
erSFEmailPreferencesStayInTouchReminder	Boolean	Yes	RW	No	
erSFemployeeNumber	String	Yes	RW	No	
erSFextension	String	Yes	RW	No	
erSFfax	String	Yes	RW	No	
erSFfederationIdentifier	String	Yes	RW	No	
erSFfirstName	String	Yes	RW	No	
erSFforecastEnabled	Boolean	Yes	RW	No	
erSFfullPhotoUrl	String	Yes	R	No	
erSFisActive	Boolean	Yes	RW	No	
erSFisPortalEnabled	Boolean	Yes	RW	No	
erSFisPrmSuperUser	Boolean	Yes	RW	No	
erSFJigsawImportLimitOverride	Int	Yes	RW	No	
erSFlanguageLocaleKey	String	Yes	RW	Yes	
erSFlastLoginDate	Datetime	Yes	R	No	Displays current time if Salesforce returns null for the attribute.
erSFlastModifiedById	String	Yes	R	No	
erSFlastModifiedDate	Datetime	Yes	R	No	
erSFlastName	String	Yes	RW	Yes	
erSFlastPasswordChangeDate	Datetime	Yes	R	No	
erSFlocaleSidKey	String	Yes	RW	Yes	
erSFmanager	Picklist	Yes	RW	No	
erSFmanagerId	String	Yes	RW	No	
erSFmobilePhone	String	Yes	RW	No	
erSFname	String	Yes	R	No	
erSFofflinePdaTrialExpirationDate	Datetime	Yes	R	No	
erSFofflineTrialExpirationDate	Datetime	Yes	R	No	
erSFphone	String	Yes	RW	No	
erSFpostalCode	String	Yes	RW	No	
erSFprofileId	String	Yes	RW	Yes	
erSFreceivesAdminInfoEmails	Boolean	Yes	RW	No	
erSFreceivesInfoEmails	Boolean	Yes	RW	No	
erSFSenderEmail	Email	Yes	RW	No	
erSFSenderName	String	Yes	RW	No	

Table 6. Attributes for the erSFAccount object class (continued)		T	,		
erSFSignature	String	Yes	RW	No	
erSFStayInTouchNote	String	Yes	RW	No	
erSFStayInTouchSignature	String	Yes	RW	No	
erSFStayInTouchSubject	String	Yes	RW	No	
erSFsmallPhotoUrl	String	Yes	R	No	
erSFstate	String	Yes	RW	No	
erSFstateCode	Picklist	Yes	RW	No	
erSFstreet	String	Yes	RW	No	
erSFsystemModstamp	Datetime	Yes	R	No	
erSFtimeZoneSidKey	String	Yes	RW	Yes	
erSFtitle	String	Yes	RW	No	
erSFpermissionSetID	String	No	RW	No	
erSFuserPermissionsCallCenterAutoLogin	Boolean	Yes	RW	No	
erSFUserPermissionsChatterAnswersUser	Boolean	Yes	RW	No	
erSFuserPermissionsInteractionUser	Boolean	Yes	RW	No	
erSFuserPermissionsJigsawProspectingUser	Boolean	Yes	RW	No	
erSFuserPermissionsKnowledgeUser	Boolean	Yes	RW	No	
erSFuserPermissionsMarketingUser	Boolean	Yes	RW	No	
erSFuserPermissionsMobileUser	Boolean	Yes	RW	No	
erSFuserPermissionsOfflineUser	Boolean	Yes	RW	No	
erSFuserPermissionsSFContentUser	Boolean	Yes	RW	No	
erSFuserPermissionsSiteforceContributorUser	Boolean	Yes	RW	No	
erSFuserPermissionsSiteforcePublisherUser	Boolean	Yes	RW	No	
erSFuserPermissionsSupportUser	Boolean	Yes	RW	No	
erSFUserPermissionsWorkDotComUserFeature	Boolean	Yes	RW	No	
erSFuserPreferencesActivityRemindersPopup	Boolean	Yes	RW	No	
erSFuserPreferencesApexPagesDeveloperMode	Boolean	Yes	RW	No	
erSFuserPreferencesContentNoEmail	Boolean	Yes	RW	No	
erSFuserPreferencesContentEmailAsAndWhen	Boolean	Yes	RW	No	
erSFUserPreferencesDisableAllFeedsEmail	Boolean	Yes	RW	No	
erSFuserPreferencesDisableAutoSubForFeeds	Boolean	Yes	RW	No	
erSFUserPreferencesDisableBookmarkEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableChangeCommentEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableEndorsementEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableFileShareNotificationsForApi	Boolean	Yes	RW	No	
erSFUserPreferencesDisableFollowersEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableLaterCommentEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableLikeEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableMentionsPostEmail	Boolean	Yes	RW	No	
erSFuserPreferencesDisableMessageEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableProfilePostEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisableSharePostEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisCommentAfterLikeEmail	Boolean	Yes	RW	No	
erSFUserPreferencesDisMentionsCommentEmail	Boolean	Yes	RW	No	

[
Table 6. Attributes for the erSFAccount object class (continued)					
erSFUserPreferencesDisProfPostCommentEmail	Boolean	Yes	RW	No	
erSFUserPreferencesEnableAutoSubForFeeds	Boolean	Yes	RW	No	
erSFuserPreferencesEventRemindersCheckboxDefault	Boolean	Yes	RW	No	
erSFuserPreferencesHideCSNDesktopTask	Boolean	Yes	RW	No	
erSFuserPreferencesHideCSNGetChatterMobileTask	Boolean	Yes	RW	No	
erSFUserPreferencesHideS1BrowserUI	Boolean	Yes	RW	No	
erSFUserPreferencesJigsawListUser	Boolean	Yes	RW	No	
erSFuserPreferencesOptOutOfTouch	Boolean	Yes	RW	No	
erSFuserPreferencesReminderSoundOff	Boolean	Yes	RW	No	
erSFUserPreferencesShowCityToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowCityToGuestUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowCountryToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowCountryToGuestUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowEmailToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowFaxToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowManagerToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowMobilePhoneToExternalUsers	Boolean	Yes	RW	No	
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erSFUserPreferencesShowStateToGuestUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowStreetAddressToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowTitleToExternalUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowTitleToGuestUsers	Boolean	Yes	RW	No	
erSFUserPreferencesShowWorkPhoneToExternalUsers	Boolean	Yes	RW	No	
erSFuserPreferencesTaskRemindersCheckboxDefault	Boolean	Yes	RW	No	
erSFuserRoleId	String	Yes	RW	No	
erSFuserType	String	Yes	R	No	
eruid	String	Yes	R	Yes	
erPassword	String	Yes	RW	Yes	
erSFuserGroupId	String	No	RW	No	

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