



Customer Engagement

# EngageOne Designer

Version 6.6

Single Sign On (SSO)

US English Edition



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## Single Sign on (SSO)

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3. For Windows 64 Bit, on the existing client machine(s) and Client Diskset use the following path to locate the *Processor.dll.config* file:

```
C:\Program Files (x86)\PBBI CCM\DOC1\Designer\Client\  
C:\Program Files (x86)\PBBI CCM\DOC1\Designer\Client Diskset\  
For Windows 32 Bit:
```

```
C:\Program Files\PBBI CCM\DOC1\Designer\Client\  
C:\Program Files\PBBI CCM\DOC1\Designer\Client Diskset\  
Edit the Processor.dll.config file using a text editor to add the channel tag attributes, secure="true" and tokenImpersonationLevel="impersonation", as shown below:
```

```
<channels>  
  <channel ref="tcp" secure="true" tokenImpersonationLevel="impersonation">  
    <clientProviders>  
      <formatter ref="binary" />  
    </clientProviders>  
  </channel>  
</channels>
```

4. For Windows 64 bits, on the client machine(s) use the following path to locate the *ResourceAccessService.exe.config* file:

```
C:\Program Files (x86)\PBBI CCM\DOC1\Resource Access Service\  
For Windows 32 Bit:
```

```
C:\Program Files\PBBI CCM\DOC1\Resource Access Service\  
Edit ResourceAccessService.exe.config file with a text editor to ensure that the channel Tag's secure attribute is set to true, as shown below:
```

```
<?xml version="1.0" encoding="utf-8" ?>  
<configuration>  
  <appSettings>  
    <add key="ResourceServer" value="localhost" />  
    <add key="ResourceServerPort" value="50241" />  
    <add key="Protocol" value="tcp" />  
    <add key="ScratchDir" value="" />  
  </appSettings>  
  <system.runtime.remoting>  
    <application>  
      <channels>  
        <channel ref="tcp" port="50242" secure="true">  
          <serverProviders>  
            <formatter ref="binary" />  
          </serverProviders>  
        </channel>  
      </channels>  
    </application>  
  </system.runtime.remoting>  
</configuration>
```

5. On the server machine restart EngageOne Template Designer Application Service using the Windows Start button, use run to execute *services.msc*, locate EngageOne Template Designer Application Service and restart the service.

6. Restart the EngageOne Resource Access Service on each client machine after the ResourceAccessService.exe.config file has been updated.
7. Restart EngageOne Template Designer Event Service on each of the client machines.

### Designer login with local credentials

In certain circumstances you may wish to login to Designer using credentials other than those of the current PC user. From the EngageOne Designer installation location, type on the command line:

```
Cockpit /LocalLogin
```

The standard login dialog will be presented, enabling you to login as a local Designer user, for example, *admin*.

### Setting up Active Directory Users

Once the configuration changes have been made you must login to Designer, as an administrator, in order to grant access to Windows users.

The first step is to ensure that you have a set of Designer user groups, with the appropriate roles, that match the Active Directory (LDAP) groups you wish to add Windows users from. Access will only be granted to the users in a LDAP group that matches Designer Group on Group's Name and imported into the Designer.

Users are imported using a simple select checkbox & save command on Import Active Directory Users and Groups screen.

Everyone and Administrators groups can't be used to configure LDAP users.

#### ◀ To manage Active Directory Users:

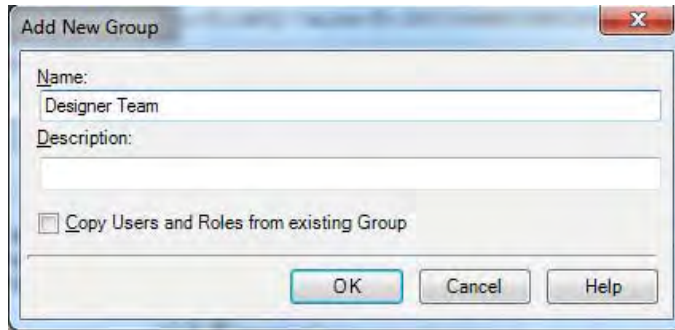
1. Login as administrator or a user with SystemAdmin privileges, e.g. from the EngageOne Designer installation location, type on the command line:  

```
Cockpit /LocalLogin
```

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2. Add the required group; note that the name you enter must match an existing Active Directory group name. The option to Copy Users and Roles from existing Group using the checkbox is not supported under these changes. This option must not be selected when configuring Active Directory users.



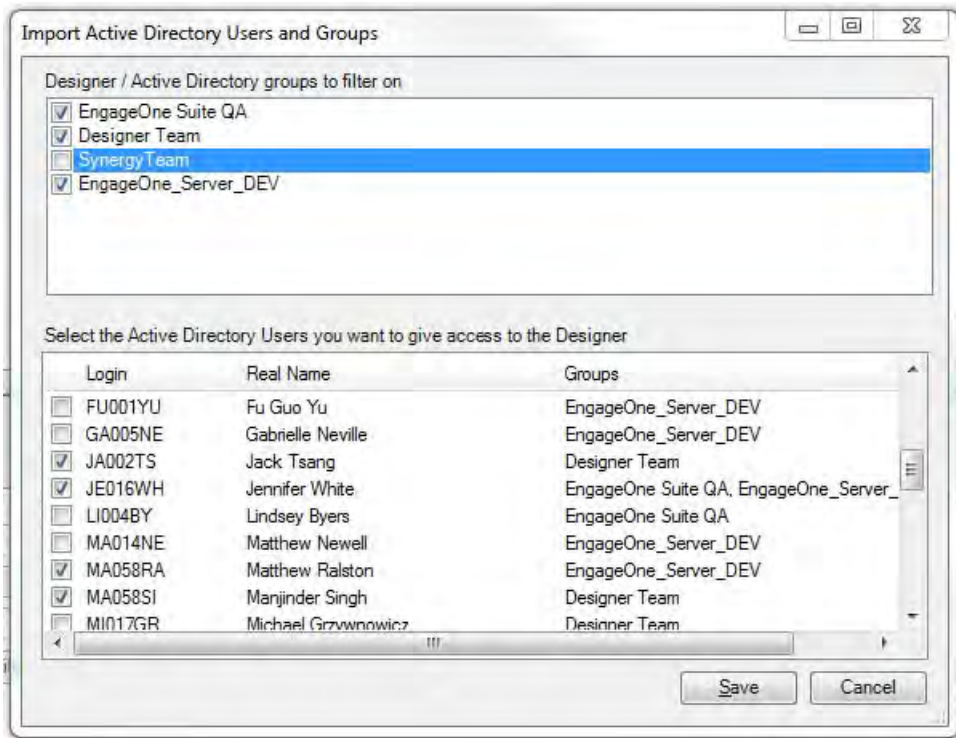
3. Select Administration->Users menu option and click *Import*.
4. On the resulting dialog, select the group names to filter on.
  - i. Selecting a checkbox on the top pane will populate the lower area with users and groups.



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- ii. Select the required users from the second list and add them to the Designer.  
This process can be repeated to import more users.



### Logging-in to Designer using SSO

Once the Active Directory users have been added they can log in automatically without entering any credentials. In the case where a user has access to multiple repositories, they will be presented with a dialog allowing them to select the repository they wish to connect to.

If the current Windows user is not known to Designer then they will be presented with a login dialog in which they can enter a known set of Windows credentials or local Designer repository credentials.