

# CardioLog Best Practice

## Integration with Custom User Data

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## Introduction

CardioLog 2007 provides advanced visitor segmentation capabilities by integrating organizational user data into reports. Retrieval of the organizational hierarchy (users and groups) is performed by the CardioLog 2007 Active Directory Agent – which consumes the data directly from Active Directory. The Active Directory Agent can also consume the data from external Web Services which supply the organization hierarchal structure.

Additional user data (such as department, gender, etc.) can be retrieved by the CardioLog 2007 Category Agent, which consumes custom user data from a designated external Web Service.

## How to Use the Users-and-Groups Web Service

In order to load the organization hierarchical structure (users and groups) from an external Web Service, the CardioLog 2007 Active Directory Agent should be configured accordingly. This is done in the CardioLog 2007 User Interface:

1. In the General Administration panel, open the **ADAgent** Service and fill out the **Web Service Url** field.

The screenshot shows a 'Web Page Dialog' window titled 'Edit Service Parameters'. It contains the following fields and controls:

- Active Directory connection string (full DNS name, ex: mydomain.co.il):
- Load users from specified organizational units (ex: OU1;OU2):
- Load from external web service url: `http://localhost/GetUsers/default.aspx`
- Active Directory User Credentials:
  - Domain Name:
  - User Name:
  - Password:
- Selected Active Directories:
- Buttons: Cancel, Save

### Web Service Schema and Format

The Users-and-Groups Web Service should be exposed by a web page which provides an Xml string response according to the following schema:

```
<?xml version="1.0" encoding="Windows-1252"?>
<xs:schema
  elementFormDefault="qualified"
  xmlns:mstns="http://tempuri.org/ADXmlSchema.xsd"
  xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:element name="tree">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="users">
          <xs:complexType>
            <xs:sequence>
              <xs:element maxOccurs="unbounded" name="user">
                <xs:complexType>
                  <xs:sequence>
                    <xs:element name="accountName" type="xs:string" />
                    <xs:element name="displayName" type="xs:string" />
                    <xs:element name="userMail" type="xs:string" />
                    <xs:element name="memberOf" type="xs:string" />
                  </xs:sequence>
                </xs:complexType>
              </xs:element>
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:element name="groups">
    <xs:complexType>
      <xs:sequence>
        <xs:element maxOccurs="unbounded" name="group">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="groupName" type="xs:string" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```

#### Field Definitions:

User **accountName**: the user portal login account.

User **displayName**: the user name (displayed in CardioLog 2007 reports).

User **userMail**: the user mail account.

User **memberOf**: a semicolon separated list of groups (as in **groupName**) associated with the user.

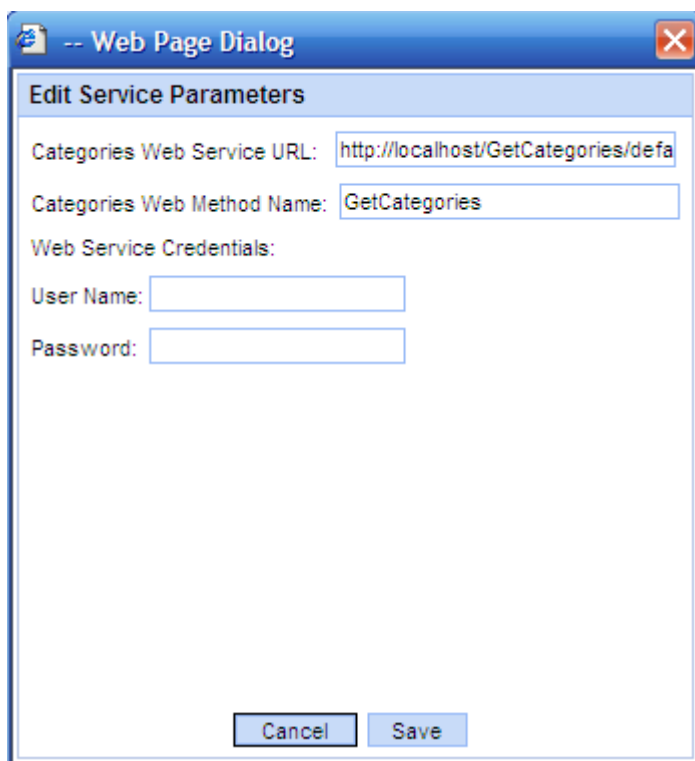
**Sample Data:**

```
<tree>
<users>
  <user>
    <accountName>MyCompany\Sigalit</accountName>
    <displayName>Sigalit Hassid</displayName>
    <userMail>sigalit.hassid@mycompany.com</userMail>
    <memberOf>Administrators;Domain Company Users</memberOf>
  </user>
  <user>
    <accountName>MyCompany\SsharonShay</accountName>
    <displayName>Shay Sharon</displayName>
    <userMail>shay.sharon@mycompany.com</userMail>
    <memberOf>Domain Company Users</memberOf>
  </user>
</users>
<groups>
  <group>
    <groupName>Domain Company Users</groupName>
  </group>
  <group>
    <groupName>Administrators</groupName>
  </group>
</groups>
</tree>
```

## How to Use the User Category Web Service

In order to load user categorization from an external Web Service, the CardioLog 2007 Category Agent should be configured accordingly. This is done in the CardioLog 2007 User Interface:

1. In the General Administration panel, open the **CategoryAgent** Service and fill out the **Categories Web Service Url** field.



The screenshot shows a dialog box titled "-- Web Page Dialog" with a close button (X) in the top right corner. The main content area is titled "Edit Service Parameters" and contains the following fields:

- Categories Web Service URL:
- Categories Web Method Name:
- Web Service Credentials:
  - User Name:
  - Password:

At the bottom of the dialog box, there are two buttons: "Cancel" and "Save".

### Web Service Schema and Format

The User Category Web Service should be exposed by a web page which provides an Xml string response, or through a Web Service which returns an XmlDocument object, according to the following schema:

```
<?xml version="1.0" encoding="utf-8" ?>
<xs:schema id="CategoryXmlSchema"
  elementFormDefault="qualified"
  xmlns:mstns="http://tempuri.org/CategoryXmlSchema.xsd"
  xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:element name="tree">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="item" type="UserCategoryXmlNode" minOccurs="0"
maxOccurs="unbounded" />
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:complexType name="UserCategoryXmlNode">
    <xs:sequence>
      <xs:element name="userName" type="xs:string" />
      <xs:element name="categories" minOccurs="0" maxOccurs="1">
        <xs:complexType>
          <xs:sequence>
            <xs:element name="categoryValue" type="categoryNode"
minOccurs="0" maxOccurs="unbounded" />
          </xs:sequence>
        </xs:complexType>
      </xs:element>
    </xs:sequence>
  </xs:complexType>
  <xs:complexType name="categoryNode">
    <xs:sequence>
      <xs:element name="categoryName" type="xs:string" minOccurs="1"
maxOccurs="1" />
      <xs:element name="categoryValue" type="xs:string" minOccurs="1"
maxOccurs="1" />
    </xs:sequence>
  </xs:complexType>
</xs:schema>
```

#### Field Definitions:

**username**: the user portal login account.

**categoryName**: the category name (displayed in the CardioLog 2007 reports).

**categoryValue**: the category value (displayed in the CardioLog 2007 reports).

**Sample Data:**

```
<tree>
  <item>
    <userName>MyCompany\Sigalit</userName>
    <categories>
      <categoryValue>
        <categoryName>Department</categoryName>
        <categoryValue>Sales</categoryValue>
      </categoryValue>
      <categoryValue>
        <categoryName >Gender</categoryName >
        <categoryValue>Female</categoryValue>
      </categoryValue>
    </categories>
  </item>
  <item>
    <userName>MyCompany\Shay</userName>
    <categories>
      <categoryValue>
        <categoryName>Department</categoryName>
        <categoryValue>Development</categoryValue>
      </categoryValue>
      <categoryValue>
        <categoryName>Gender</categoryName>
        <categoryValue>Male</categoryValue>
      </categoryValue>
    </categories>
  </item>
</tree>
```