
Connecting the Word Plugin to Sugar Using LDAP

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Overview

Sugar® Plug-in for Microsoft Word enables you to pull data directly from Sugar to perform mail merges in Microsoft Word. This article covers how to connect the Word Plug-in to Sugar using LDAP.

Prerequisites

The Sugar instance must meet the following prerequisites:

- Your organization must already use an LDAP service, such as Microsoft's Active Directory, to manage application authentication.
- You must be an administrator user to confirm or configure LDAP settings in your Sugar instance.
- SAML authentication must be disabled in the Sugar application for Sugar Plug-in for Microsoft Word to connect to Sugar.
- For on-site customers, it may be necessary to install the appropriate PHP mcrypt extension for your version of PHP. For example, if your server uses PHP 5.x, the php5-mcrypt extension is required for the Encryption Key field to be editable.

End users who wish to connect their local installations of the Sugar Plug-in for Microsoft Word to Sugar using LDAP must meet the following prerequisites:

- Users must already have the plug-in installed (but not configured) on their copy of Microsoft Word. For more information, please refer to the [MS Word Plug-in Installation Guide](#).
- Users must be using the latest version of the Sugar Plug-in for Microsoft Word.

Steps to Complete

An administrator user should confirm Sugar's LDAP settings before regular users can configure their Word Plug-in installations with Sugar. The following sections cover how to confirm the LDAP settings in Sugar as well as how users can configure the Word Plug-in to authenticate to Sugar via LDAP.

Administrator : Confirming the LDAP Connection

Use the following steps to confirm the LDAP authentication in your Sugar instance. For more information about enabling and configuring LDAP for your Sugar instance, please refer to the [Password Management](#) documentation.

1. Log into Sugar and navigate to Admin > Password Management.
2. Confirm that the LDAP settings are configured properly in the LDAP Support panel.
Note: If the Auto Create Users option is enabled, please be aware that a new user will be automatically created in Sugar if a non-Sugar user attempts to use the plugin with their LDAP credentials.
3. Confirm that the Encryption Key field is populated.
Note: If this field is not populated, create a unique key using standard alphanumeric characters. This key is unique to Sugar and the applications that will use LDAP to connect to Sugar.
4. Copy the value of the Encryption Key and distribute it to your end users. They will need to enter this key when configuring the plug-in.

Password Management

LDAP Support

Enable LDAP Authentication

Server: MYSERVER.MYDOMAIN.com

Port Number: 389

User DN: ou=people, dc=example, dc=com

User Filter:

Bind Attribute: userPrincipalName

Login Attribute: sAMAccountName

Group Membership:

Authentication:

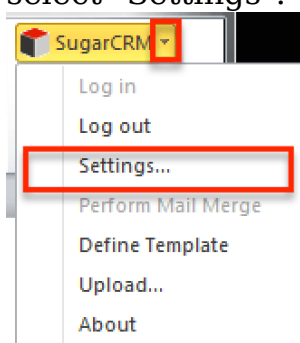
Auto Create Users:

Encryption Key:

End Users : Configuring the Word Plug-in Using LDAP

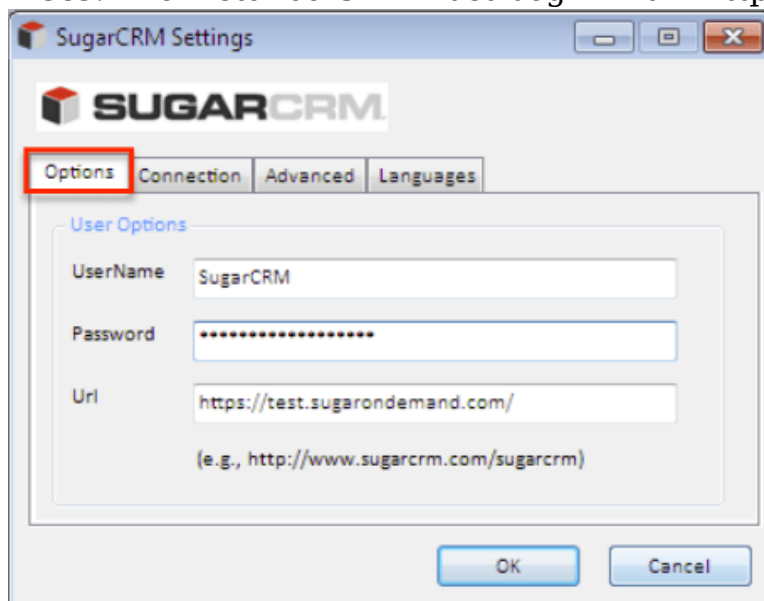
Users can connect their Word Plug-in with Sugar via LDAP using the following steps. Please note that you must first download and install (do not configure) the latest release of the Sugar Plug-in for Microsoft Word before proceeding with these steps.

1. Launch Microsoft Word, click "SugarCRM" on the Add-ins ribbon, then select "Settings".

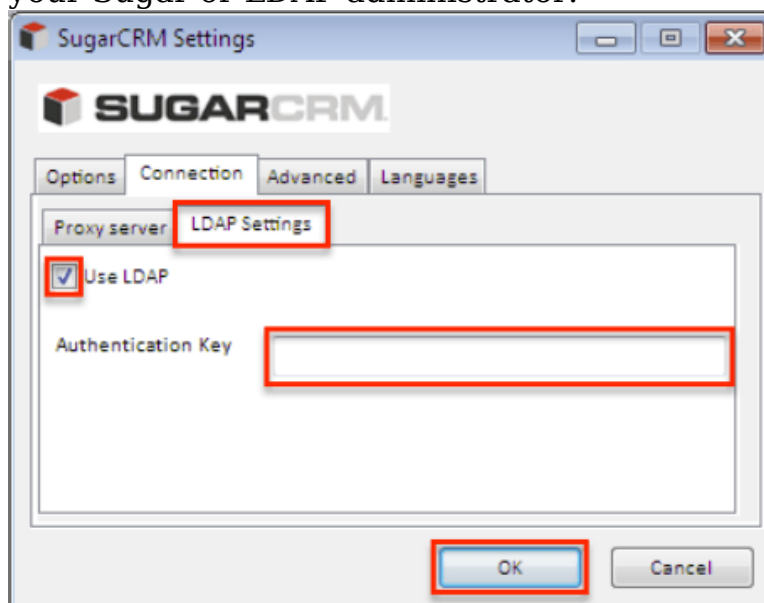


2. Enter the LDAP login credentials used to access your Sugar instance as well as your instance URL.

Note: The instance URL must begin with "https://".



3. Next, click on the Connection tab then the LDAP Settings sub-tab.
4. Mark the Use LDAP checkbox and enter the encryption key provided by your Sugar or LDAP administrator.



5. Click "OK".

The plug-in will attempt to connect to Sugar by authenticating using LDAP. If the connection is successful, the SugarCRM Settings window will disappear. If the connection cannot be established, check the credentials under the Options and Connections tabs then click "OK" to try again. If the connection continues to fail even after verifying the credentials, please contact your Sugar administrator for further assistance.

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