



help



report



control



booking



time

Manual

Artologik

EZ-LDAP

HD-LDAP

PM-LDAP

TIME-LDAP

QR-LDAP

Artologik LDAP version 2

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Table of Contents

Part 1 - Introduction	1
Access.....	1
Principles.....	1
Plugin.....	1
Start the LDAP Explorer.....	2
Part 2 - Generic Settings	2
Generic Settings	2
Login Settings.....	4
Import Settings.....	4
LDAP Hosts.....	5
Part 3 – Import Container	6
Define Container.....	6
Create New Container.....	6
Edit Existing Container.....	7
Define Import Settings for Containers.....	7
Define Container.....	7
Remove Container.....	7
Settings.....	8
Match Import Fields.....	11
Data Field Matching.....	11
Data Field Rules.....	12
Add Rules.....	13
Remove Rule.....	14
Show Container Properties.....	14
Del 4 - Import to the Artologik program	14
New Users in Artologik.....	16
Import of respondents.....	16
Duplicates.....	16
Default Template for Import	17
User roles in the Default template.....	17
Glossary.....	18

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Part 1 - Introduction

Access

A prerequisite for using LDAP import is that the Web Server has access to the LDAP server. Make sure there are no firewalls blocking the access.

If the settings cannot be saved, it could be because the Internet user has no rights to write to the Directory.

The basic settings are saved in the Registry of the web server. In order for the settings to be saved, the user account used must have permission to do this. If you have the setting "Anonymous access" set in on the web server, then the user account used here must have permission to update the Registry. You can also switch off "Anonymous access" on the file AGS_LDAP_Admin.exe only. Then you will have the possibility to login with another account.

Principles

The LDAP server is used for verification of users and as a data source (master) for user information. If the verification fails towards the LDAP server, control can also be made towards the user table of the Artologik database.

The user information is transferred to the Artologik program in three ways:

- General user import via the menu Administration > User > Import > Import user from LDAP.
- In connection with the log-in in the Artologik program; a new user is created or updated information is synchronized.
- For Artologik Query&Report also for respondents, via Data collection > Respondents database > Add from LDAP. The import can also be reached via a single survey; Data collection > Select survey > Link from LDAP.

Plugin

The interface is prepared for customer related additional modules, Plugin. These fields are marked in grey and can only be changed by Artologik.

There are additional modules within the following areas:

- User Verification (Login Settings)
- Update of user information (Login Settings and Import Settings)
- Listing of user information in the Artologik program (Import Settings)

The settings are made per installation, not per host.

Start the LDAP Explorer

- Log in to your program with the admin account.
- On the page with the product list, change the URL from http://Your-URL/cgi-bin/AGS_Login.exe to http://Your-URL/cgi-bin/AGS_LDAP_Explorer.exe. The interface is then opened.

The user account Admin is the only account with access to the administrative interface for the LDAP settings. You cannot log in as a regular user with administrative rights. If the Admin account is inactivated it has to be activated first.

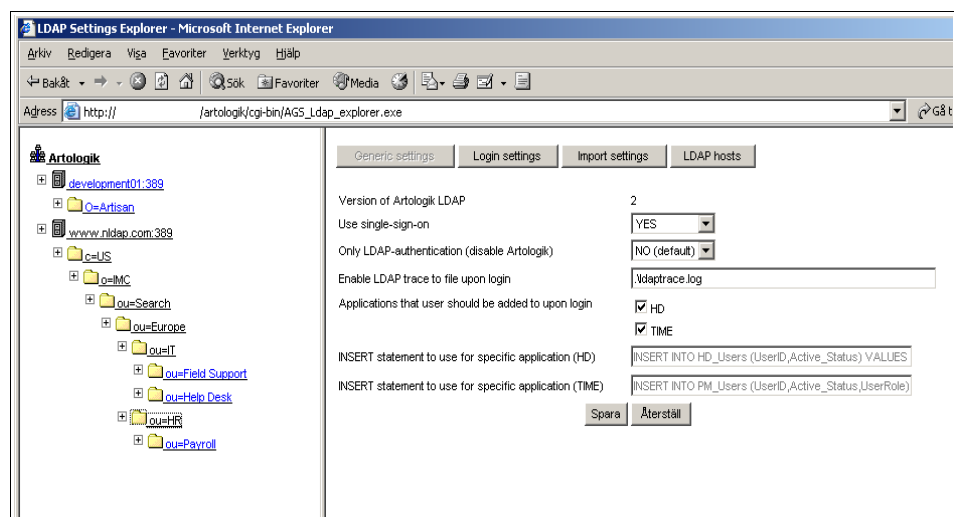
If you are using the setting “Only LDAP-authentication” the admin-account must exist in the LDAP-server, or you won't be able to login to the LDAP administrative interface.

Note: The LDAP Explorer can only be used in the browser MS Internet Explorer.

Part 2 - Generic Settings

Generic Settings

Normally, these settings do not have to be changed.



Version of Artologik LDAP: Displays which version of the LDAP interface is being used.

Use single-sign-on: Select NO (default), or YES. If you select YES you can start the Artologik program directly without having to define login name and password.

Only LDAP-authentication (disable Artologik): Select NO (default), or YES. Indicates whether the verification should be made towards the LDAP server (YES) or towards both the LDAP server and the user table in the Artologik program (NO). NO is recommended.

If you select YES and the LDAP server cannot be reached for some reason, you cannot log in to the Artologik program. The alternative YES also implies that all users are registered in the LDAP server.

Notice: The admin-account must exist in the LDAP-server, or you won't be able to login to the LDAP administrative interface.

If you select NO, you are instead verified against the Artologik user table if the server cannot be reached, and you can log in to the program. The alternative NO does not require that all users in the Artologik program are registered in the LDAP server. It is sufficient that all users are entered into the Artologik user table in order for you to log in.

Enable LDAP path to file upon login: Indicates the name of the log file that is created at the login. (The logging is always active) Enter the LDAP path of a container where ALL users have write permissions.

If the field is left blank, i.e. no LDAP path is entered, no log file is created.

Applications that user should be added to upon login: Here, you can select which programs, of the programs you are licensed to, the users should be imported to at login or regular user import. Mark the checkbox.

INSERT statement to use for specific application: Indicates the syntax for entering of new users in the Artologik user table, for each program. These parameters should not be changed if you want the update to work.

Sync Artologik password: Select NO (default), or YES. Indicate if synchronization of password should be made between the LDAP server and the Artologik database. YES is recommended.

This means that the password used in the LDAP-server also will be added to the Artologik database in order to prevent duplicate users.

Plugin for verifying user credentials during login: Indicates which Plugin, or additional function, should be used at login. Is used at special adjustments.

Method in plugin: Indicates which method of the above Plugin should be used.

Plugin for sync (update) of user info in LDAP container: Indicates which plugin should be used when synchronizing the user information between the LDAP server and the Artologik database. In the current version it is required that Plugin AGS_ImportUsersLib.dll is used, in order for the settings under "Match Import Fields" to be activated.

Method in plugin: Indicates which method of the above Plugin should be used. (Method 2 = loginImportUsers in AGS_ImportUsersLib.dll)

Import Settings

Plugin for list of users to import: Plugin that is used when listing users before import, in the Artologik program, i.e. the selection of which users are displayed in the program.

This is a function that can be tailored. A need for adapting this function can arise if you want to import your users from somewhere else than the LDAP server. Perhaps you want to import from a text file or another directory, link and match different directories, or add your own terms.

Method in plugin: Indicates which method of the above Plugin should be used.

Plugin for importing user: Indicates which Plugin should be used at user import.

Method in plugin: Indicates which method of the above Plugin should be used. (Method 1 = ImportUsers in AGS_ImportUsersLib.dll).

LDAP Hosts

Normally, the name or IP address of the host is enough. Other necessary parameters are added by the program at installation.

If you want to remove a host, you mark the host in the list by LDAP Hosts and click the button Remove, at the bottom of the page. Click OK when asked if you want to remove the host.

LDAP Hosts: Here, you select which host to use for import. You can also select to create a new host. Use the IP address or name of the host.

When you have created a new host, it will be available in the tree structure on the left-hand side of the administrative interface.

The screenshot shows a configuration window with four tabs: 'Generic settings', 'Login settings', 'Import settings', and 'LDAP hosts'. The 'LDAP hosts' tab is active. The form contains the following fields and controls:

- LDAP Hosts:** A dropdown menu with the option '[New host]' selected.
- Host (ip-address or name):** A text input field.
- Port:** A text input field containing the value '389'.
- Base:** A text input field.
- Filter:** A text input field containing the value '(objectclass=*)'.
- Description:** A text input field.
- Login:** A text input field.
- Password:** A text input field.
- Existing paths:** A dropdown menu with the option '[None]' selected.

At the bottom of the form, there are three buttons: 'Save', 'Återställ', and 'Remove'.

Host (IP address or name): The selected host will be displayed here.

Port: Select which tcp port to be used. The default value is port 389, but this can be changed if the LDAP server uses another port.

Base: The path to the first folder where user information is stored. If nothing is filled in, i.e. the field is left blank, the highest level is used in the LDAP server.

Filter: The default value is (objectclass=*), i.e. all object classes. It is possible to modify the filter so that it e.g. only handles objects of the class 'Persons', (objectclass=person). At import in the Artologik program only the users matching this filtering are displayed.

Description: Own description of the host.

Login: If the LDAP server does not allow anonymous access, the user name of the server has to be specified.

Password: The password of the user account that was stated in the field above.

Existing Paths: It does not matter which alternative is selected. The list merely provides information as to which defined containers are available in the selected host.

Part 3 – Import Container

Define Container

These settings are made in the tree structure on the left-hand side of the administrative interface.

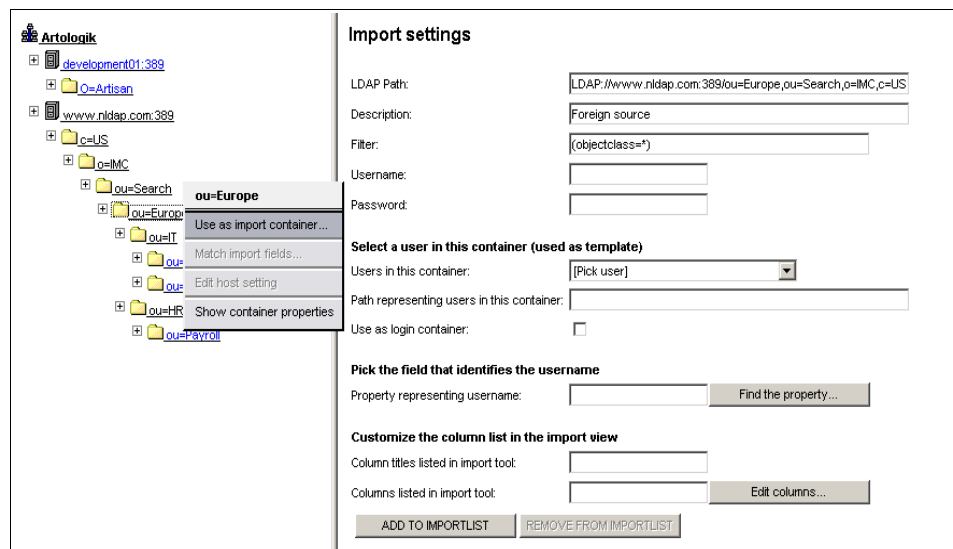
- You can define several containers in the same host.
- The import can be made recursively, i.e. users can be collected also from underlying levels.

Create New Container

1. Mark a suitable container within the selected host, i.e. a folder with users, in the tree structure on the left-hand side.
2. Right-click and select "Use as importcontainer".
3. If the folder is already defined as an import container, you select "Edit import settings for this container" instead.
4. The window "Import Settings" is opened on the right-hand side.

Edit Existing Container

1. Mark a suitable container within the selected host in the tree structure on the left-hand side.
2. Right-click and select "Edit import settings for this container".
3. The window Import Settings is opened on the right-hand side.



Define Import Settings for Containers

On this page you identify which field to use as user ID and which field to display in the import interface within the Artologik program. Additionally, you activate the container as a possible host for user import.

A container that has been defined as a possible host for import is marked in blue, a container that has not yet been defined is marked in black.

Define Container

1. Mark the selected container in the tree structure.
2. Right-click and select "Edit import settings for this container".
3. Make all settings described below.
4. Click the button "Add to importlist". Now, the container is ready for import.

Remove Container

1. Mark the selected container in the tree structure.
2. Right-click and select "Edit import settings for this container".
3. Click the button "Remove from importlist".

Settings

Import settings

LDAP Path:

Description:

Filter:

Username:

Password:

Select a user in this container (used as template)

Users in this container:

Path representing users in this container:

Use as login container:

Pick the field that identifies the username

Property representing username:

<input type="radio"/>	cn	Llyod Garrison
<input type="radio"/>	ACL	6#entry#cn=Llyod Garrison,ou=Field Support,ou=IT,ou=Europe,ou=Search,o=IMC,c=US#loginScript
<input type="radio"/>	ACL	6#entry#cn=Llyod Garrison,ou=Field Support,ou=IT,ou=Europe,ou=Search,o=IMC,c=US#printJobConfiguration
<input type="radio"/>	ADsPath	LDAP://www.nldap.com:389/cn=Llyod Garrison,ou=Field Support,ou=IT,ou=Europe,ou=Search,o=IMC,c=US
<input checked="" type="radio"/>	cn	Llyod Garrison

Customize the column list in the import view

Column titles listed in import tool:

Columns listed in import tool:

LDAP Path: This is the complete path to the import container. The syntax is:

1. LDAP://
2. Server name or IP number:
3. Port number/
4. Container name, it is listed from the bottom up to the root. Each container is defined with a comma (,).

Description: Description of the container. The description is used in the import interface of the Artologik program and should therefore be unique and also describe the contents of the container.

In large LDAP structures it can be hard to find the right container. Therefore, it is important that the description contains information that shows you have chosen the right container.
The default value is copied from the host.

Filter: The default value is collected from the host. Normally, this is (objectclass=*), i.e. all object classes. It is possible to modify the filter so that it e.g. only handles objects of the class 'Persons' (objectclass=person). The value set here decides what is displayed in the import window within the Artologik program, but not what is displayed in the LDAP Explorer, i.e. the administrative interface.

Username: The user name of the container has to be specified if Anonymous user cannot be used.

Password: The password of the user account that was stated in the field above.

Select a user in this container (used as template): This is where you indicate which of the users in the container should be used as template for the import. Select a user who has the attributes needed for the import, select a 'typical' user. This is done to make the rest of the configuration easier.

Users in this container: This is where all available users of the container in question are displayed. Select one of them.

Path representing users in this container: This is the complete path to the selected user, generated by the program.

Pick the field that identifies the username: Select which LDAP field, or attribute, should correspond to the user name in Artologik. Generally, it is "uid", but for AD it is "sAMAccountName".

Select the attribute that identifies a unique user.

Property representing username: Enter the name directly in the field or search among the available fields. Click the button "Find the Property" and mark the field in question. Close the window by clicking "Hide".

Customize the column list in the import view: This is where you select which LDAP fields should be displayed in the Artologik import interface.

Column titles listed in import tool: Indicates the titles of the columns that should be displayed in the import interface and in which order the columns should be displayed.

Columns listed in import tool: Indicate which LDAP fields should be displayed in the import interface and in which order the columns should be displayed.

Click the button "Edit Columns" in order to select columns or modify previously selected columns. Mark the checkbox in front of the attributes that you want to display in the columns.

Below the window where the LDAP fields are marked, the column title and selected fields of each column are displayed, in the selected order.

In order to change the order of the selected column, change directly in the field "Columns listed in import tool".

Click "Hide" to close the window.

Change Column Title

If you wish to change column titles, you can either change directly in the field "Column titles listed in import tool" or click the editable field for column titles that is displayed when you have clicked "Edit columns".

Customize the column list in the import view

Column titles listed in import tool:

Columns listed in import tool:

dnQualifier 2200009

employeeNumber 2200009

mail Llyod.Garrison@dirconnect2.org

givenName Llyod

title Director

UserName	First name	Last name	Title
cn	givenName	sn	title
Sample 1	Sample 2	Sample 3	Sample 4

Click the button "Use new colnames" in order to update and save the new column titles.

Click "Reset colnames" in order to reset to the default values.

When all settings are made, you just click the button "Add to importlist". Now, the container is ready for import, and is marked in blue in the tree structure. The container is now displayed in the list of available containers in the import interface.

If you have made changes in an already defined container, you click "Update" to update the changes.

If you want to remove a defined container click the button "Remove from importlist". This action will also remove the container from the list of available containers in the import interface of Artologik.

Match Import Fields

Notice!

- The settings only work if Plugin AGS_ImportUsersLib.dll is installed. If the plugin is not installed, the database is updated according to a default template. This default template differs for each Artologik product. For more information, see the Default Template for Import.
- The settings have to be defined for each specific host.
- Even if the settings are defined for each host, you have to mark a container in order to make the settings.

Data Field Matching

This is where you connect the field name of the host to the corresponding field in the Artologik database.

Right-click a container in the tree structure on the left-hand side in the interface and select Match Import Fields. The alternative Data Field Matching starts.

At the top of the page, in blue letters, you will see which host the settings apply to.

- The column Table displays the tables in the Artologik database.
 - The column Table Fields displays the column names in the Artologik database.
 - The column LDAP Attribute displays the fields or attributes in the LDAP server.
1. Select a user that you want to use as a template.
 2. For each table and column in the selection list, select the Attribute to be added to the Artologik database.
 - The color black means that there is an attribute assigned to the selected template user and it is already used or connected for matching.
 - The color green means that there is no attribute for the selected template user, but that it still should be matched and for users who have this attribute, the information will be added to the database. For users who do not have the attribute, this field in the database will become blank.
 - The color blue means that the attribute is available in the LDAP server and has a content, but it is still not used or connected for matching.
 - The color red means "No Match". Nothing is collected from the LDAP server. The field in the database becomes blank.
 3. Click "Save" when all matchings are made.
 4. In order to return to the default settings, click "Reset".
 5. If you want to match an attribute that is not available to the selected template user, you can add this attribute.
 1. Click "Add" in the subject for LDAP Attribute. A window is opened.
 2. Enter the name of the attribute, click OK.

Data field matching
Data field rules

LDAP://www.nldap.com:389/ou=Field_Support,ou=IT,ou=Europe,ou=Search,o=IMC,c=US

This is where you match all import fields. The data table field on the left gets the value from the specified attribute on the right

cn=Llyod Garrison

Table	Table Field	LDAP Attribute Add
AGS_Users	Address	[No match] ▼
AGS_Users	Cellphonenumber	[No match] ▼
AGS_Users	City	[No match] ▼
AGS_Users	Country	[No match] ▼
AGS_Users	Email	mail ▼
AGS_Users	Fax	[No match] ▼
AGS_Users	Personal_Code_Number	employeeNumber ▼
AGS_Users	Phonenumber	telephoneNumber ▼
AGS_Users	User_FName	givenName ▼
AGS_Users	User_LName	sn ▼
AGS_Users	Zipcode	[No match] ▼
HD_Users	ipAddress	[No match] ▼

Save
Reset

Data Field Rules

Here, you can set rules for the import and these will work as data field rules. For example, if you use the program Artologik HelpDesk you can directly divide them into different organizations when you import new users - the users belonging to the Financial department in the user directory can be imported as users in the organization Finance in Artologik HelpDesk.

The rules that are created are run in the order of the list, from top to bottom. If two rules contradict each other the bottom one overwrites the previous rule since it is run after.

First on the list are the settings in the Default Template. These become overwritten by the created rules. The settings that are not overwritten by the created rules will retain the default settings.

Data field matching
Data field rules

LDAP://www.nldap.com:389/ou=Field Support,ou=IT,ou=Europe,ou=Search,o=IMC,c=US

Here you are able to add rules for the user import. The fields below are supposed to be read as "If [Source field] = [Source value] then the database field [Data target] shall be [Value]"
 [Source value] could use any database wildcard, for example %
 Use the select box below to load all available attributes and their values for the specific container.

cn=Llyod Garrison

Source field	Source value	Data target	Value	
givenName	John	AGS_Users.User_FName	<input type="text" value=""/>	Remove
c	USA	AGS_Users.Language	UK	Remove
[Pick value]	<input type="text" value=""/>	[Pick target]	<input type="text" value=""/>	Add

The syntax is the following: "If [Source field] = [Source value], then the database field [Data target] should be [Value]".

- [Source field] is the field in the LDAP server.
- [Source value] can be a database wild card, e.g. %. Which wild cards that work depend on the database Artologik is installed on. Wild cards that work in the database will work in the query.
- [Data target] is the table and column in the Artologik database where the value should be entered.
- [Value] is the value that should be entered in the database.

Add Rules

1. Select a user that you want to use as a template.
2. Select a value in the selection list under the column Source Field. If you want to create your own value, select the alternative "Add Manually" in the list. A window is then opened where you enter your value, or attribute. Then select the new attribute in the selection list.
3. Enter the value that matches the attribute in the user directory.
4. Select the target in which database table the value should be entered.
5. Enter the value to be set.
6. Click "Add" to add your rule.
7. The rule becomes marked in yellow. This means that the rule is created, but not saved.
8. Save when all rules are correct.

An example: If [Source field; c] = [Source value; Sweden], then the database field [Data target: AGS_Users.Language] should be [Value; SE]"

I.e. if 'c' = 'Sweden', then set the column Language in the table AGS_Users to SE.

This rule means that all users who have entered Sweden as their country in the LDAP server directory will have SE as their language code in the Artologik database.

Remove Rule

1. Click the button Remove to the right of the rule.

Show Container Properties

If you want to see the properties of the selected directory, right-click and select "Show Container Properties".

To modify the import settings, click "Edit Import Settings". A window is opened where settings can be modified.

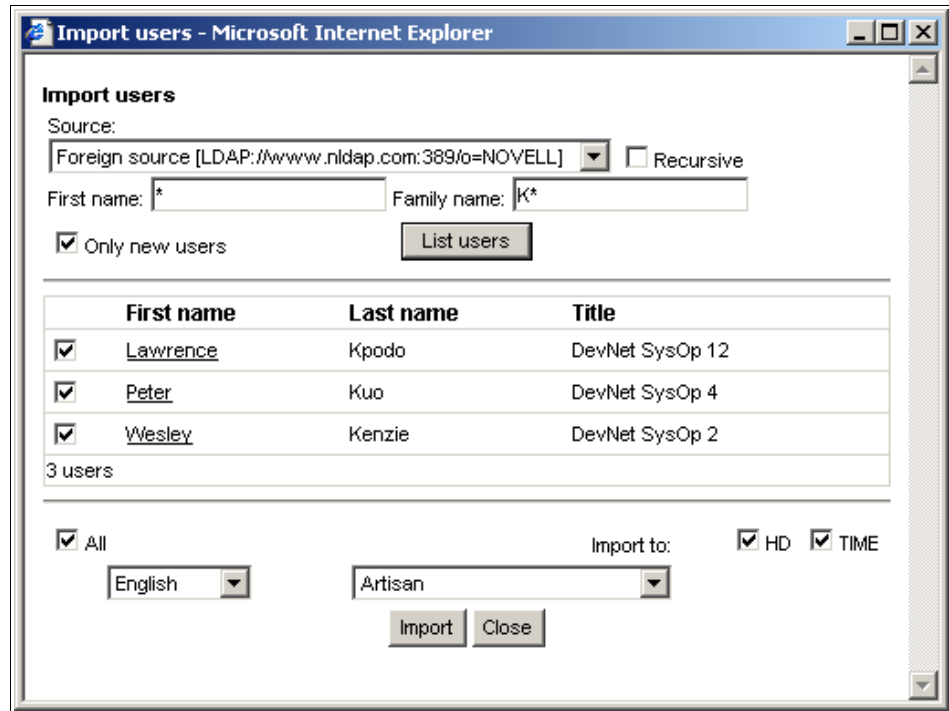
To modify the settings for the host, click "Edit Host Settings". The page with the settings to define the host is opened.

Del 4 - Import to the Artologik program

The import is made via an import function in the Artologik program. This import is recommended the first time an import is made to the program, or if you have added many users to your user directory in the LDAP server. Other changes of the user information are updated each time the user logs in to the Artologik program. Occasional new users in the LDAP server are registered as new users when they log in to the Artologik program for the first time. They will then be given rights etc. according to the default settings.

The settings made here are default settings. Any import rules that were created under "Data Field Rules" will overwrite the default settings. Users who are not affected by any of the rules will retain the default settings.

Respondents in Artologik Query&Report do not log in to the program regularly, and the information about respondents is not automatically updated towards the LDAP-server. The contact with the LDAP-server is open the moment the import is made. When you want to update the information you need to do a new import, and overwrite the duplicates in the Artologik database. Read more below, Import of respondents.



For further information on the default settings, see Default Template for Import.

Go to the menu Administration > Users. Click the button Import. Click the link "Import Users from LDAP" on the page that is opened.

1. Select import container. All defined containers are in the list.
2. Select if the import should be made from the selected container only, or if all users in the subcontainers should be listed as well. If so, mark the checkbox "Recursive".
3. Specify any selection conditions for First name and Family name.
4. New users means only the users missing from the Artologik database. If you don't select "Only new users" all users will be imported.
5. Click "List users". Users that match the selection are listed.
6. Select which users should be imported by marking the checkbox by the user, or select All by marking the checkbox "All", at the bottom of the page, under the listed users.
7. By clicking the name of the listed user you will be able to view information on the user.
8. Select which applications the users should be imported to. Your licenced applications are displayed as checkboxes.
9. Select language code for the user.
10. Select the company/organization that the users should be imported to.
11. Click the button "Import" to start the import.
12. Click "Close" to close the import window.

New Users in Artologik

Users that are created manually in the Artologik program are not updated by LDAP unless they are created with the same user name used in the LDAP-server. The users can log in to Artologik but cannot use Single Sign-On. The update of the user information only works one way, i.e. from the LDAP server to the Artologik program, and not the other way around.

However, if the user is created with a user name existing in the LDAP-server, the information will be updated.

It is not recommended that users are created manually in Artologik. Instead, they should be added to the user directory in the LDAP server. Users should then log in to Artologik where they will be registered as users automatically.

Import of respondents

The contact with the LDAP-server is open the moment the import is made. Respondents in Artologik Query&Report do not log in to the program regularly, and the information about respondents is not automatically updated towards the LDAP-server. When you want to update the information you need to do a new import, and overwrite the duplicates in the Artologik database.

Go to the menu Data collection > Respondents database > Add from LDAP. The import can also be reached via a single survey; Data collection > Select survey > Link from LDAP.

1. Select import container. All defined containers are in the list.
2. Select if the import should be made from the selected container only, or if all users in the subcontainers should be listed as well. If so, mark the checkbox "Recursive".
3. Specify any selection conditions for First name and Family name.
4. Click "List respondents". Users that match the selection are listed.
5. Select which respondents should be imported by marking the checkbox by the user, or select All by marking the checkbox "All", at the bottom of the page, under the listed respondents.
6. By clicking the name of the listed respondent you will be able to view information on the user.
7. Select what language shall be set for the respondents.
8. If company/organization is not set for the users on the LDAP-server, it is set to xxx. This makes it possible to search for the imported group in the respondents database.
9. Click the button "Import" to start the import.
10. Click the button "Finish import" to finish the import.

Duplicates

Check that there are no duplicates (that are not ment to be imported). If so, change either name, organization name or email adress. The recommendation

is to make the change on your LDAP server. If an import is finished with duplicates, the existing information in the respondents database is replaced. Further information about duplicates can be found in the Artologik program, in manual or help for Import of respondents, Add from file.

Default Template for Import

The column to the left displays tables and columns in the Artologik database. The column to the right displays attributes in the LDAP file.

The information for each attribute will be imported to each table and column, respectively, in the Artologik database, unless import rules are created that decide otherwise.

AGS_Users.User_FName	= givenname
AGS_Users.User_LName	= sn
AGS_Users.Email	= mail
AGS_Users.Phonenumber	= telephonenumber
AGS_Users.Address	= officestreetaddress
AGS_Users.Zipcode	= postalcode
AGS_Users.City	= l
AGS_Users.Country	= c
AGS_Users.Cellphonenumber	= mobile
AGS_Users.Fax	= facsimiletelephonenumber
AGS_Users.Personal_Code_Number	= employeeid
(AGS_Users.IdapPath	= ADsPath //ADSI-specific:
not an LDAP attribute, but always the path of a user)	

User roles in the Default template

The language selected to be “First language” in the Artologik software will be set as language code for each imported user.

Helpdesk

Users imported to the Helpdesk organisation will get the user role Telephone operator.

Users imported to a Customer organisation will get the user role Organisation user.

ProjectManager

The imported users will get the user role Member, with user rights according to the previously defined permissions for new users.

TIME

The imported users will get the user role Member, with user rights according to the previously defined permissions for new users.

Notice: The fields User role, User group and Result unit will not be imported into the default import for TIME.

This will be revised in future versions. Until then we recommend that a Database Report is run after the first user import.

EZbooking

The users will be imported to the selected Organisation and will be assigned Access level 1.

Glossary

Attribute: characteristic, fields containing different information on a user in the user directory of the LDAP server, e.g. the attributes c=country; mail=e-mail address; givenname=first name; sn=surname.

Data source: see Host.

Host: the host, i.e. the LDAP server from where the user information is collected.

Container: a directory in the host where user information is stored.
LDAP Host: see Host.

LDAP server: the host, file, directory, where the user information is stored, examples are: Active Directory, Lotus Notes or NDS.

LDAP Explorer: the administrative interface in the Artologik program where import settings and hosts etc. are defined.

Recursive: data structure, e.g. the directory or folder structure in a file. If something is set as recursive, it means that e.g. settings are inherited downwards in the data structure, or directory structure.