AD Sync Service For iManage 10

Import Users and Groups from Active Directory

AD Sync Service User Manual

Version 10.0.2



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1. Support

For support, please contact support@uclogic.com

2. Updates

Version 10.0.2

18 January 2023

Added option to disable any users that are disabled in Active directory even if not in the user

synchronisation groups

Added option to clear email address field if a user is disabled

Version 10.0.1

2 August 2022

Redeveloped for REST API iManage access

Not compatible with iManage cloud

Version 9.11

8 Dec 2017

Fixed issue where imanadmin.dll sets EXCH_AUTO_DISCOVER to null whenever a user update .

happens

AD Manager has the ability to specify the direct SQL settings if this fix is needed

A new log file is now only created if the existing one is larger than specified in the Manager settings

Version 9.10 3 December 2015 ------Changed password encryption method for saving password in the registry. Fixes a Bad Data Cryptographic error

11 November 2015



Added ability to specify maximum log size, when the log file reaches this size a new log file is created

Log file size can be between 10K and 30000K (30 Mb). Default is 10Mb.

Version 9.6

27 April 2015

Stopped user ids with blanks from stopping the process - these are reported in the log

Version 9.5.4 22 October 2014

Fixed issue with searching for large number of AD objects, now use paged queries Fixed bug with searching for groups not returning hits when similar searches are performed

Version 9.5.1 21 October 2014

Supports Worksite 9 databases

Password now stored in encrypted format, please resave settings and jobs to encrypt passwords Included the imanadmin.dll file with the installation package

Version 9.5



Supports Worksite 9 databases – this version only supports version 9 databases



3. Installation

There are two applications that make up the AD Sync Service application.

- AD Sync Service
- AD Sync Manager

They should both be installed on the same server, ideally not on a server that runs any other Worksite server services.

Pre-requisites:

- Windows 2016/19 server, 64 bit, 4GB Ram
- Server must be part of the domain not a standalone/workgroup server
- iManage 10.2 Server or later

Installation will need to be carried out by an administrator user.

To install the AD Sync service applications, run the setup.exe application

👹 Sysero AD Sync Service for iManage 10

Welcome to the Sysero AD Sync Service for iManage 10 Setup Wizard

		1	
		۰.	
	·		
0	100	a	

 \times

The installer will guide you through the for iManage 10 on your computer.	ne steps required to	o install Sysero AD) Sync Service
WARNING: This computer program i treaties. Unauthorized duplication or result in severe civil or criminal penal possible under the law.	distribution of this p	rogram, or any po	ortion of it, may
	< Back	Next >	Cancel

Click Next



🕼 Sysero AD Sync Service for iManage 10			_		\times
Select Installation Folder					
The installer will install Sysero AD Sync Serv	vice for iMa	anage 10 to the	followi	ng folder.	
To install in this folder, click "Next". To install "Browse".	l to a differ	ent folder, ente	r it belo	w or click	k
Eolder: C:\Program Files\Sysero\Sysero AD Sync	Service for	or iManage	Br	owse	
			Dis	k Cost	
Install Sysero AD Sync Service for iManage computer:	10 for you	rself, or for any	one wh	o uses thi	S
• Everyone					
⊖ Just <u>m</u> e					
<	<u>B</u> ack	<u>N</u> ext >		Cancel	
Click Next					
🥵 Sysero AD Sync Service for iManage 10			-		×
Confirm Installation					
The installer is ready to install Sysero AD Syr computer.	nc Service	for iManage 1	0 on yo	our	
Click "Next" to start the installation.					
< 1	Back	Next >		Cancel	

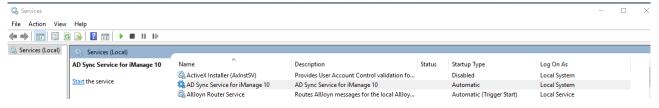
Click Next



🕼 Sysero AD Sync Service for iManage	10		_		\times
Installation Complete					
Sysero AD Sync Service for iManag	e 10 has been su	ccessfully install	ed.		
Click "Close" to exit.					
Please use Windows Update to che	ck for any critical u	updates to the .N	NET Fr	amewo	rk.
	< <u>B</u> ack	<u>C</u> lose		Cance	el

Click Close

The application will be installed as a windows service called AD Sync Service for iManage 10, running under the local system account.

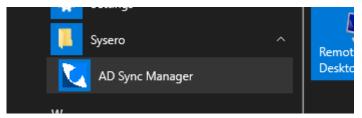


You may change the account it runs under, but the account must be local administrator.





The AD Sync Manager has also been installed in the Sysero application folder



To configure the application, use the AD Sync Manager application.





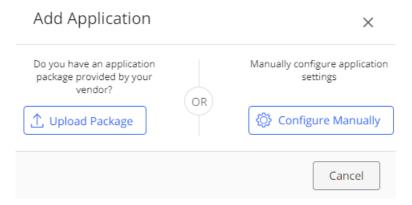
4. iManage Server Configuration

The AD Sync application required an application to be configured in the iManage Control Centre. You will need to get your iManage administrator to set this up for you.

Login to the control centre from the PC where you have AD Sync installed, then select Applications.

≡	Control Center					0	
	Trash	 ications Manage Work capabilities with third-party pr	oducts and limit user access to a	pplications. Help Doc [2]			
METADA	~ AI	Search applications by name	∑ Filter ∨			1-27 of 27 + Add Applicat	ition
	Custom Fields						
	Classes / Subclasses	Name	Publisher	Extends iManage Product	Security	Application Status	
	File Handlers	Microsoft Project Microsoft Project	iManage LLC	Work for Desktop	All Users	Enabled	:
	File Types	Excel Microsoft Excel	iManage LLC	Work for Desktop	All Users	Enabled	:
	Captions	iManage non-integrated handler iManage Handler for Non-integrated apps	iManage LLC	Work for Desktop	All Users	Enabled	:
	Templates	Adobe Acrobat Reader Adobe Acrobat Reader	iManage LLC	Work for Desktop	All Users	Enabled	:
•••	Applications	Workspace Generator iManage Workspace Generator	iManage LLC		All Users	Enabled	:
Ø	Global	DeskSite iManage DeskSite	iManage LLC	Work for Desktop	All Users	Enabled	:
30	Refile	iManage Refile Service	iManage LLC		La Custom	Enabled	:

Click Add Application, Upload Package



Select the manifest.zip file that was installed with the AD Sync software, this is usually in the following directory:

C:\Program Files\Sysero\Sysero AD Sync Service for iManage 10



The Add Application dialog should now show:

Add Application		
1 Configuration	Authentication Access	-4 Review
Name	ADSync	
Description		
API Key (i)	27941378-831e-4c4e-a92 ff0a63a65457	2d-
API Secret (i)	747f30e4-2d29-b4d6-5ba b6c203ba92e4	ad-
Publisher	Sysero	
Website		
Email		
	Authentication >	Cancel



Click Authentication

Add Application \times 3 4 Configuration Authentication Access Review iManage Work 🕗 Yes Authentication Required? Application Type 🔵 Web 🔵 Native Client Type (i) Public Confidential Redirect URL * (i) http://localhost/ Add Another URL Client Secret (i) 747f30e4-2d29-b4d6-5bad-b6c2C Generate Never Client Secret Expires (i) Allow Refresh Token (i) Yes Refresh Token Expiry (i) days 365 Access Token Expiry (i) 30 mins < Configuration Cancel Access

Change the Allow Refresh Token to Yes



Click Access, and add the iManage users that will be running the AD Sync manager and service

Add Application	×
Configuration Authentication Access	-4 Review
Allow access to O All Users 💿 Custo	m
Q Search for Users	
C Search for Users	×

Click Review and Finish to add the application. You should now have the application added to the Control Centre.

ADSync	Sysero	Work for Desktop	💁 Custom	Enabled

Without this, you will not be able to use the AD Sync product.





5. Active Directory Configuration

AD Sync Service uses groups created within the Active Directory to identify the users and groups to synchronise with Worksite

If you need to synchronise users with Worksite, create at least one group that contains a list of AD users.

If you need to synchronise groups with Worksite create at least one group that contains a list of AD groups.

The actual number of groups you will need to create depends on the number of database, default database requirements and access rights required

To create an Active Directory group, load Active Directory Users Administration program

Create a group

lew Object - Group	×
Create in: uclogic.com/Users	
Group name:	
Worksite Users	
Group name (pre- <u>W</u> indows 2000):	
Worksite Users	
Group scope	
O Domain local O Security	
Global O Distribution	
C Universal	
< <u>Back</u> <u>Next</u> > Cancel	

Add the members you require.



You may add subgroups to this group and AD Sync will get the members for all subgroups to calculate a list of users that need to include in the synchronise process. If a user appears in multiple sub groups, AD Sync will only add the user once.

Notes:

If a user is removed from this group, the user will not be removed from Worksite If a user is renamed in AD, a new user will be added to Worksite with the new name. Use the Database Administrator 'rename' feature to perform the same task in Worksite.

Repeat this process to configure groups for synchronising with Worksite. Instead of adding users to the master group, add groups.

Worksite Groups Prop	perties	? ×
General Members	fember Of Managed By	
Members:		
Name	Active Directory Folder	
Commercial	uclogic.com/Users	
Finance	uclogic.com/Users uclogic.com/Users	
Private Clients	uclogic.com/Users	
Property	uclogic.com/Users	
🕵 Tax	uclogic.com/Users	
Add	Remove	
	OK Cancel A	pply

These groups will be added to Worksite, and the members added to the Worksite groups. These groups can contain subgroups as AD Sync will work out the complete membership of the groups before synchronising.

If a user is removed from a group in AD, then this will be reflected in Worksite If a user is added to a group/subgroup in AD, this will be reflected in Worksite.



6. Configuring the AD Sync Service

The service is configured by settings held in the registry. These are managed using the AD Sync Manager application.

X	AD Sync Manager	-		x
Global Settings AD Syn	nc Jobs			
Work Server URL iManage User Password	https://ws10.uclogicfiles.com administrator •••••• Connect			
Interval (seconds) Log File Location Max Log File size (Kb)	60 C:\Users\Administrator.WS10\Desktop 10000 10 MB Save Settings			
10.0.0.2	uclogicfiles.com - AD Sync license online - expires 17 January 2	024	Exit	t

Start the AD Sync Manager application

These settings determine the user that is used to login to worksite to add the users and groups. The Worksite user should be a user that is a member of the NRTADMIN group in all databases. Use the iManage password for the account, not the AD password.

The interval determines how often the synchronise process is run, enter a period in seconds, e.g.

10 minutes	600
30 minutes	1800
1 hour	3600
etc.	



Select a log file location and a maximum log file size. When the log file reaches the maximum size specified a new log file is created and the old one will be renamed. No log files are automatically deleted.

Click the Save Settings button.

Next configure the jobs by clicking the AD Sync Jobs tab. You must first connect to the iManage system using the connect button before you can manage the jobs.

🔁 AD Sync Manager		- 🗆 X
Settings AD Sync Jobs	Job Name	
✓ External Users & Groups	All Users Job Settings AD Mapping Job Options Active Directory Server Port (Default 389) dev.uclogicfiles.com 389 iManage Databases	 ✓ Enabled ☐ External Users & Groups
	Users USers LDAP://dev.uclogicfiles.com/CN=iManage Users,CN=Users,DC Default Database Default File Server LONDON Groups	edev,DC=uclogicfiles,DC=com
10.0.0.1	dev.uclogicfiles.com - AD Sync license online - e	Save Job





Field	Description	Typical Values
Active Directory Server	The active directory domain name	internal.uclogic.com
	for the application to search	or
		corp.uclogic.com
Port	Enter the port number to	Default is 389
	communicate with the LDAP Server	
Users	An active directory group with a list	
	of members that are to be	
	synchronised with iManage. Use	
	the lookup button to select a group	
	from AD.	
New User Password	Enter a password to assign to new	
	users	
Default File Server	Enter the document file server to be	DEFSERVER
	used by the new user. If left blank	
	the default DEFSERVER will be	
	used	
Groups	An active directory group with a list	
	of subgroups. The first set of sub	
	groups gets synchronised. All	
	members of these groups will be	
	added as group membership in the	
	iManage databases. Use the lookup	
	button to select a group from AD	
iManage databases	Select the iManage databases to	
	synchronise to.	
Default Database	Selects the default database to	MATTERS
	assign to new users	
External Users	Check this if you want to add the	
	users and groups as external.	
Enabled	Check this to enable the job to run	
	during the next synchronisation run	

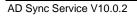


Right click in the jobs pane to display the pop up menu

Create New Job Rename Job Delete Job Copy Job

To create a new job, click Create New Job, then complete the fields in Job Settings and AD Sync Mapping before clicking Save Job.

To copy an existing job, right click it, select Copy Job, then enter a new Job name and click Save Job.





Click the AD Mappings tab to specify which Active directory fields should map to which Worksite fields

All Users Job Settings AD Name	Mapping Job Options		
_			
Namo			
Name	SAMAccountName ~		
Full Name	displayName \checkmark		
Email	mail 🗸		
Custom1	~		
Custom2	"Directors" ~		
Custom3	~		
Location	physicalDeliveryOfficeName <		
Phone	telephoneNumber 🗸		
Extension	~		
Fax	~		
	Email Custom1 Custom2 Custom3 Location Phone Extension	Email mail Custom1 ~ Custom2 "Directors" Custom3 ~ Location physicalDeliveryOfficeName Phone telephoneNumber Extension ~	Email mail Custom1 ~ Custom2 "Directors" Custom3 ~ Location physicalDeliveryOfficeName Phone telephoneNumber Extension ~

Some fields have recommended defaults. We suggest the Name is always mapped to SAMAccountName.

To use other active directory fields, you can just enter the Active Directory field name manually in the corresponding field, or use the lookups on some of the fields

You can also just add any text to be added by enclosing this between double quotes – see Custom2 above, or add the Job name by entering %ADSyncJobName%





	AD Sync Manager	-	x
Global Settings AD Sync Jobs			
★ External Users & Groups ✓ Test Users	Job Name Test Users Job Settings AD Mapping Job Options Check for any disabled users in AD Clear email address for disabled users Prevent nos overwriting Remove wrong Internal/External members from groups		

Job options can be configured per job by clicking the Job Options tab

Use the "Check for any disabled users in AD" to disable any iManage users that have been disabled in Active Directory, even if the user account has been removed from the user synchronisation groups. This will apply to all databases selected for the job.

Use the "Clear email address for disabled user" to force the iManage email address to be cleared when a user is disabled. This applies to all databases selected for the job.

Prevent NOS Overwriting is used to stop the NOS value for each user from being overwritten every time the users are synchronised. In most cases you should leave this option unchecked.

Remove wrong internal/external members from groups is used to remove any internal users from external groups or external users from internal groups as this is not a supported configuration for iManage system. If users get changed between internal and external it is possible that they are left as members of the wrong group, so this option will clean these up. In most cases, you should leave this option checked.



Starting the Service

After the AD Sync Manager has been used to define the jobs required, the service can be started from the Services application in Windows

Services							_	
File Action View	Help							
(+ +) 🗖 🖾	Q 📑 🛛 📷 🕨 🖬 🗤 🕨							
🔍 Services (Local)	Services (Local)							
	AD Sync Service for iManage 10	Name	Description	Status	Startup Type	Log On As		
	Start the service	🧠 ActiveX Installer (AxInstSV)	Provides User Account Control validation fo		Disabled	Local System		
		🧠 AD Sync Service for iManage 10	AD Sync Service for iManage 10		Automatic	Local System		
		🎑 AllJoyn Router Service	Routes AllJoyn messages for the local AllJoy		Automatic (Trigger Start)	Local Service		

Any issues with starting the service will be logged to the event viewer, Windows Logs, Application.

Once the service is started the log file will then be used to record activity. The log file location can be configured using the AD Sync Manager, under the Settings tab. The log file will be called ADSyncServiceLog.txt.

ADSyncServiceLog.txt	
1 03/08/2022 14:51:10	Install Directory: C:\Program Files\Sysero\Sysero AD Sync Service for iManage 10
	Application Version : 10.0.0.1
3 03/08/2022 14:51:40	
	Timer Fired, intervals of 60 seconds
	Checking ADSync license for domain dev.uclogicfiles.com
	dev.uclogicfiles.com - AD Sync license online - expires 18 September 2023
7 03/08/2022 14:51:43	
	Processing Job All Users
	Connected to serve http://ucserver2.uclogicfiles.com as user imanserv
	AD Server-dev.uclogicfiles.com
11 03/08/2022 14:51:43	
	Databases=LONDON, NEWYORK
	Default Database=LONDON
14 03/08/2022 14:51:43	
	Groups= <u>LDAP://dev.uclogicfiles.com/CN=iManage</u> Groups,CN=Users,DC=dev,DC=uclogicfiles,DC=com
	Users=LDAP://dev.uclogicfiles.com/CN=iManage Users,CN=Users,DC=dev,DC=uclogicfiles,DC=com
17 03/08/2022 14:51:43	
	Remove wrong users from internal/external groups=Y
	Group found for User sync : (N=iManage Users
	Synchronising users from CN=iManage Users : 7 users
	(IONDON from AD Group LDAP://dev.uclogicfiles.com/CM=Support.CN=Users.DC=dev.DC=uclogicfiles.DC=com) Updating User - Logon enabled: William.Parkin
	LONDON from AD Group LDAF://dev.uclogicfiles.com/CN=Support_CN=Users_DC=dev.DC=uclogicfiles.DC=com) Updating User - Logon enabled: Stephanie.Mitchell
	LONDON from AD Group LDAP://dev.uclogicfiles.com/CN=Support.CN=Users.DC=dev.DC=uclogicfiles.DC=com/ Updating User - Logon enabled: Segundant Akan
	LONDON from AD Group LDAF://dev.uclogicfiles.com/CN=Support.CN=Users.DC=dev.DC=uclogicfiles.DC=ccm) Updating User - Logon enabled: William.Jones
	LONDON from AD Group LDAP://dev.uclogicfiles.com/CM=Support.CN=Users.DC=dev.DC=uclogicfiles.DC=com) Updating User - Logon enabled: Folly.Gifford
	LONDON from AD Group LDAP://dev.uclogicfiles.com/CN=Support.CN=Users.DC=dev.DC=uclogicfiles.DC=com) Updating User - Logon enabled: Wayne.Fletcher
	LONDON from AD Group LDR://dev.uclogicfiles.com/CN=Support_CN=Users_DC=uclogicfiles.DC=ucom) Ubdating User - Logon enabled: Rikki.Cox
	London los found in AD Group 7
	LONDON) User Count: Users added 0
	(LONDON) User Count:Users updated 7
	(LONDON) User Count:Users failed to add 0
	NEWYORK from AD Group LDAP://dev.uclggicfiles.com/CN=Support.CN=Users.DC=dev.DC=uclggicfiles.DC=com) Updating User - Logon enabled: William.Parkin
33 03/08/2022 14:51:44	(NEWYORK from AD Group LDAP://dev.uclogicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclogicfiles,DC=com) Updating User - Logon enabled: Stephanie.Mitchell
	NEWYORK from AD Group LDAP://dev.uclgicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclgicfiles,DC=com/ Updating User - Logon enabled: Nasrullah.Khan
	(NEWYORK from AD Group LDAP://dev.uclogicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclogicfiles,DC=com) Updating User - Logon enabled: William.Jones
	(NEWYORK from AD Group LDAP://dev.uclogicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclogicfiles,DC=com) Updating User - Logon enabled: Polly.Gifford
	(NEWYORK from AD Group LDAP://dev.uclogicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclogicfiles,DC=com) Updating User - Logon enabled: Wayne.Fletcher
	(NEWYORK from AD Group LDAP://dev.uclogicfiles.com/CN=Support,CN=Users,DC=dev,DC=uclogicfiles,DC=com) Updating User - Logon enabled: Rikki.Cox
	(NEWYORK) User Count:Users found in AD Group 7
	(NEWYORK) User Count:Users added 0
	(NEWYORK) User Count:Users updated 7
	(NEWYORK) User Count:Users failed to add 0
	Group found for Group sync : LDAP://dev.uclogicfiles.com/CN=iManage Groups,CN=Users,DC=dev,DC=uclogicfiles,DC=com
	(LONDON) Updating Group : Support (Support)
	(LONDON:SUPPORT) Group Count:Users found in AD Group 7
	(LONDON:SUPFORT) Group Count:External users removed from internal group 0
	(LONDON:SUPPORT) Group Count:Internal users kept in external group 0
	(LONDON:SUPPORT) Group Count:Users removed from group due to AD change 0
	(LONDON:SUPPORT) Group Count:Users added to DMS group 0
	(LONDON:SUPPORT) Group Count:Users not added to DMS Group 0
	(LONDON:SUPPORT) Group Count:Users now in DMS Group 7
	(NEWYORK) Updating Group : Support (Support)
	(NEWYORK: SUPPORT) Group CountiUsers found in AD Group 7
	(NEWYORK:SUPPORT) Group Count:External users removed from internal group 0
	(NEWYORK:SUPPORT) Group Count:Internal users kept in external group 0
	(NEWYORK:SUPPORT) Group Count:Users removed from group due to AD change 0
	(NEWYORK:SUPPORT) Group Count:Users added to DMS group 0
	(NEWYORK:SUPPORT) Group Count:Users not added to DMS Group 0
	(NEWYORK:SUPPORT) Group Count:Users now in DMS Group 7
	(LONDON) Updating Group : Sales (Sales)



The log files show the application and job settings, plus a step by step progress report.

Counts are reported at the end of each user synchronise.

```
03/08/2022 14:51:44 (LONDON) User Count:Users found in AD Group 7
03/08/2022 14:51:44 (LONDON) User Count:Users added 0
03/08/2022 14:51:44 (LONDON) User Count:Users updated 7
03/08/2022 14:51:44 (LONDON) User Count:Users failed to add 0
```

Counts are reported after each group synchronise

```
03/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users found in AD Group 703/08/2022 14:51:44(LONDON:SUPPORT) Group Count:External users removed from internal group 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Internal users kept in external group 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users removed from group due to AD change 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users added to DMS group 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users not added to DMS Group 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users not added to DMS Group 003/08/2022 14:51:44(LONDON:SUPPORT) Group Count:Users not added to DMS Group 0
```

