AD Sync Service

AD Sync Service User Manual

Version 10.0.2

Sysero

Contents

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

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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

Version 9.9

11 November 2015

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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 9.8

2 November 2015

Added list of valid AD fields to AD Mapping combo box fields

Set default value for user name to be SAMAccountName in AD Mapping when clicking Default button

Support for text values to be added to user fields on add/modify users

Support for %ADSyncJobName% variable to save job name in user fields on add/modify

For new users, password never expires is checked

Version 9.6

27 April 2015

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

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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

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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

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Version 9.5

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11 August 2014

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

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3. Installation

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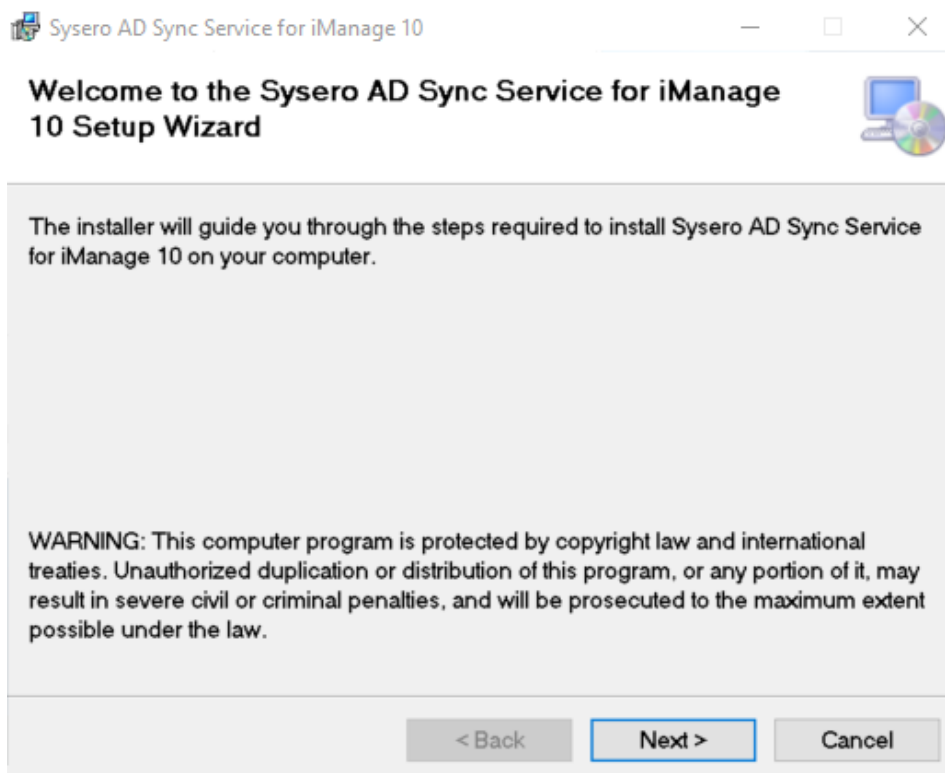
- AD Sync Service
- AD Sync Manager

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

Click Next
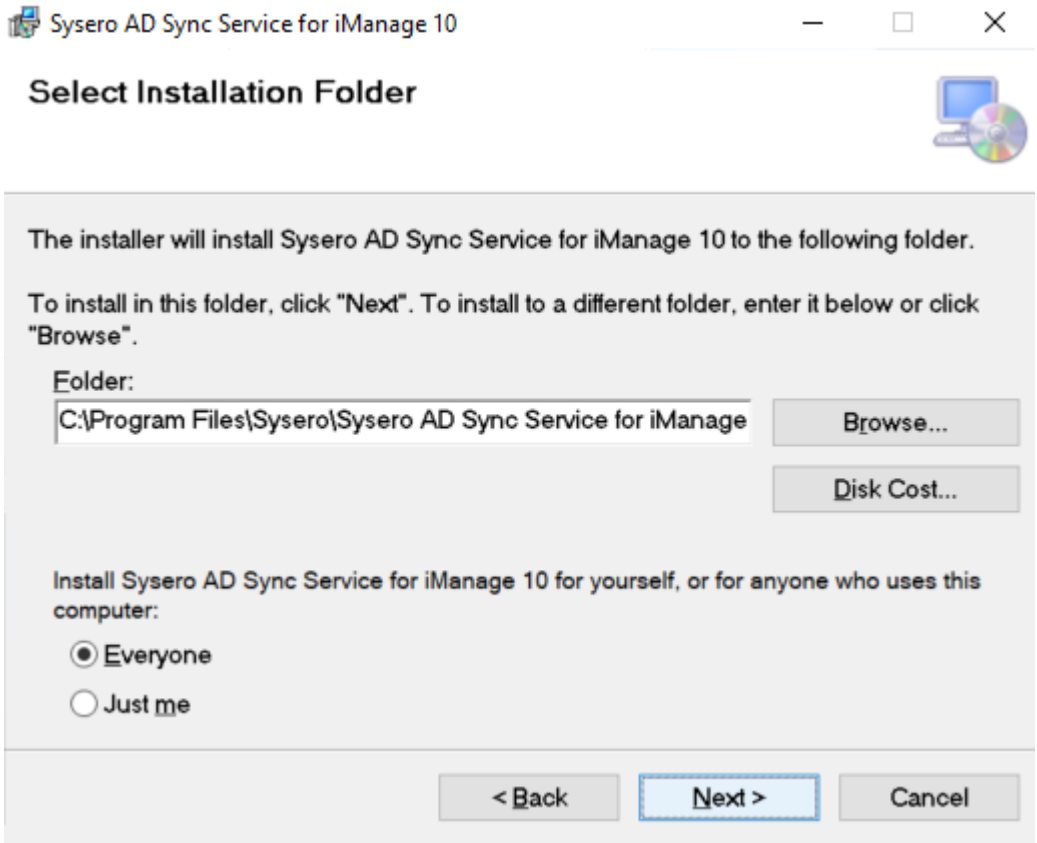
Click Next
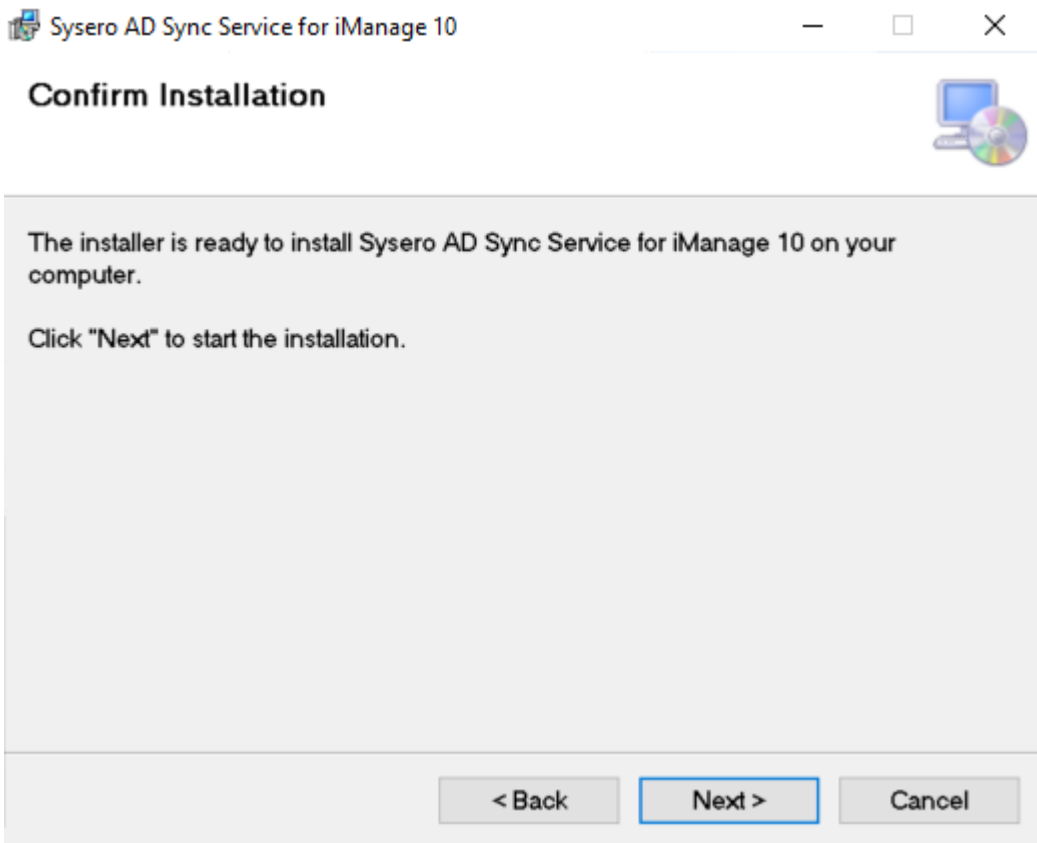
Click Next
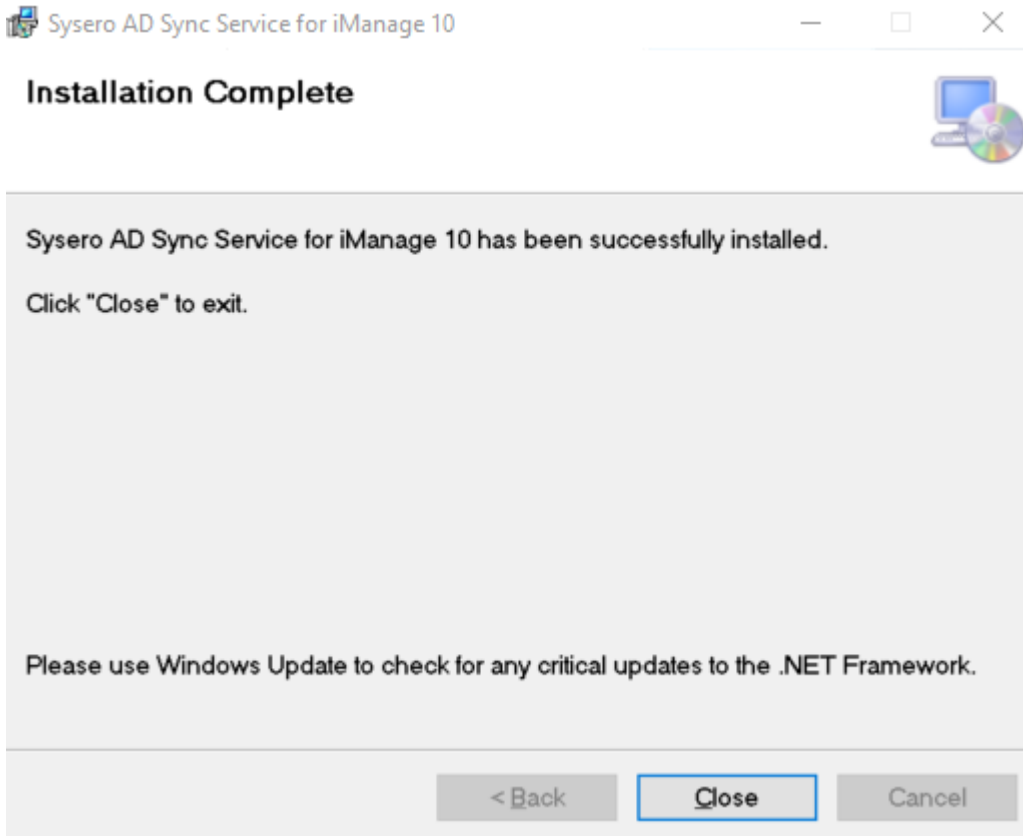
Click Close

The application will be installed as a windows service called AD Sync Service for iManage 10, running under the local system account.
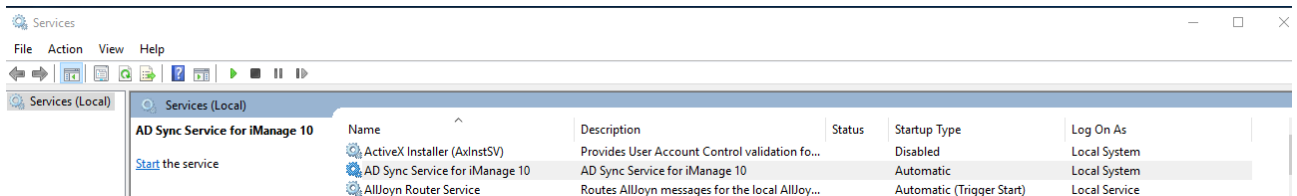
You may change the account it runs under, but the account must be local administrator.

The AD Sync Manager has also been installed in the Sysero application folder
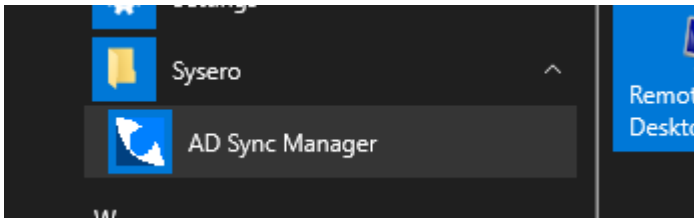
To configure the application, use the AD Sync Manager application.

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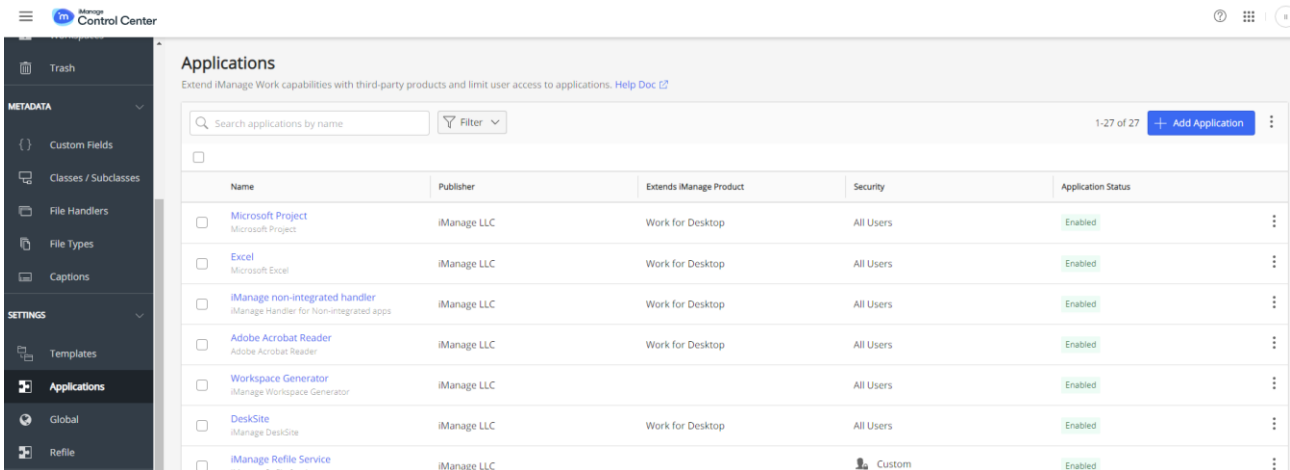
Click Add Application, Upload Package
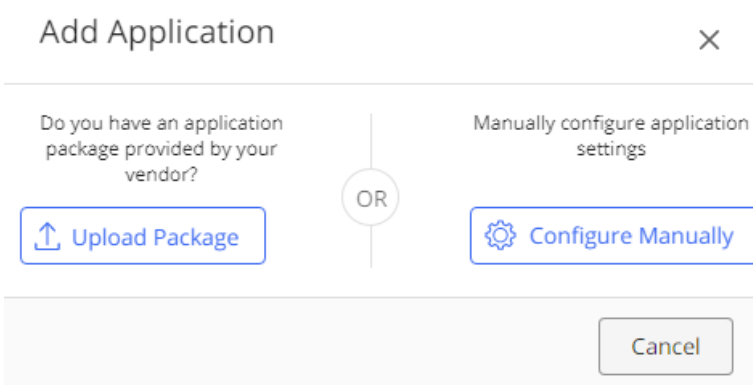
Select the manifest.zip file that was installed with the AD Sync software, this is usually in the following directory:

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

The Add Application dialog should now show:

Add Application   ✕

        ①————·————②————·————③————·————④
   Configuration Authentication   Access   Review

   Name   ADSync

   Description

   API Key ⓘ   27941378-831e-4c4e-a92d-
                           ff0a63a65457

   API Secret ⓘ   747f30e4-2d29-b4d6-5bad-
                           b6c203ba92e4

   Publisher   Sysero

   Website

   Email

                           Authentication >   Cancel

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Click Authentication

Add Application ✕

Configuration — **2** Authentication — ③ Access — ④ Review

iManage Work Authentication Required?	⬤ Yes
Application Type	⦿ Web ◯ Native
Client Type ⓘ	⦿ Public ◯ Confidential
Redirect URL * ⓘ	http://localhost/
	⊕ Add Another URL
Client Secret ⓘ	747f30e4-2d29-b4d6-5bad-b6c2C
	Generate
Client Secret Expires ⓘ	⦿ Never ◯ 🗓
Allow Refresh Token ⓘ	⬤ Yes
Refresh Token Expiry ⓘ	365 days
Access Token Expiry ⓘ	30 mins

〈 Configuration   Access 〉   Cancel

Change the Allow Refresh Token to Yes

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

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

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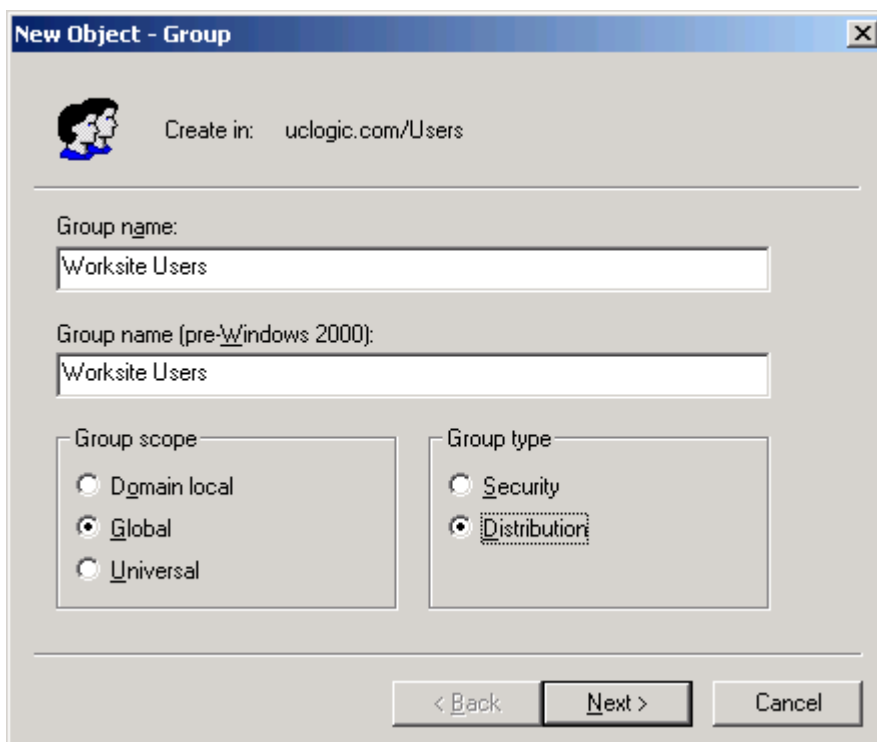
If you need to synchronise users with Worksite, create at least one group that contains a list of AD users.

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

Add the members you require.

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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.
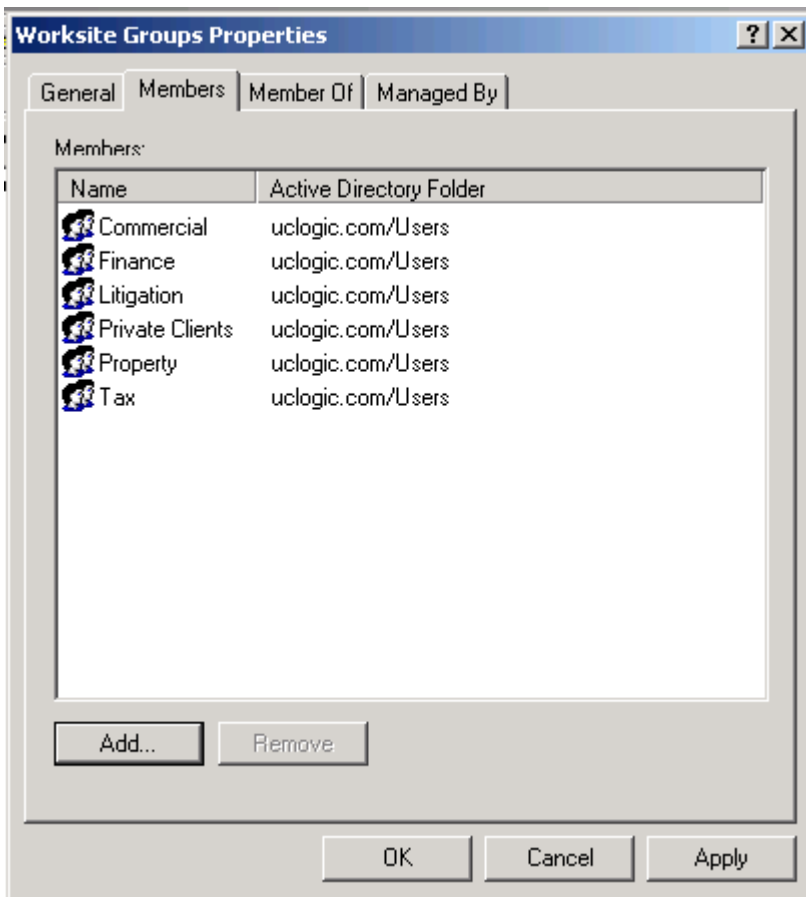
These groups will be added to Worksite, and the members added to the Worksite groups. These groups can contain subgroups as AD Sync will work out the complete membership of the groups before synchronising.
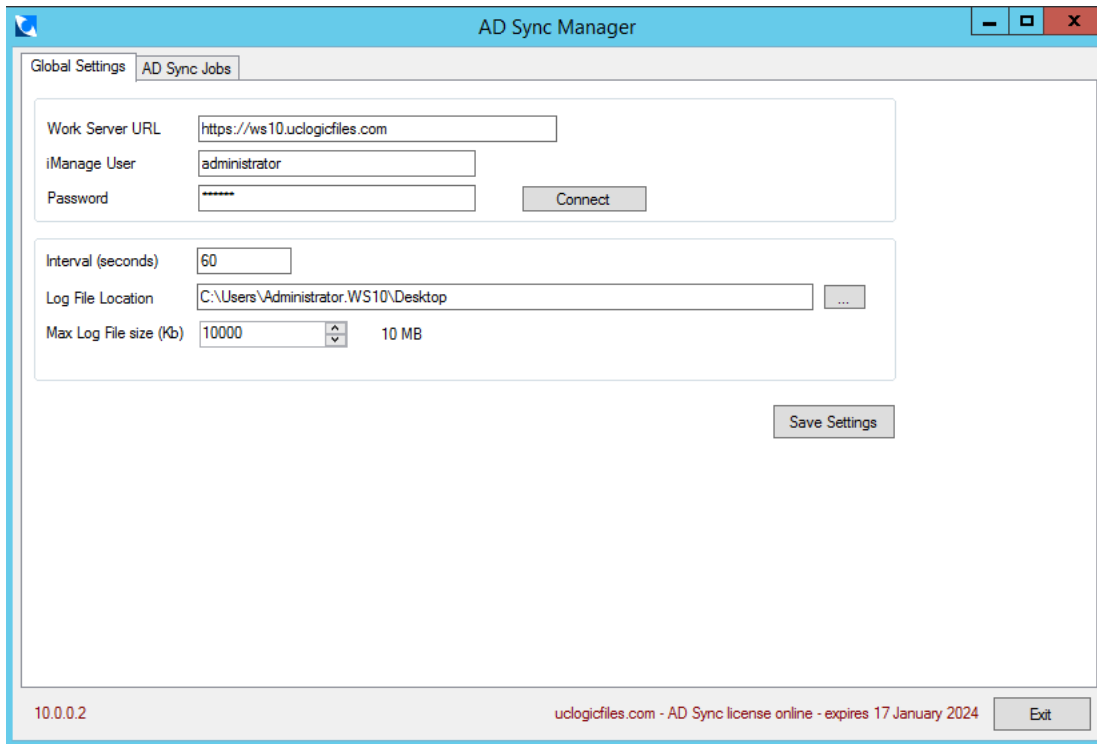
If a user is removed from a group in AD, then this will be reflected in Worksite

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.

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.	

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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.
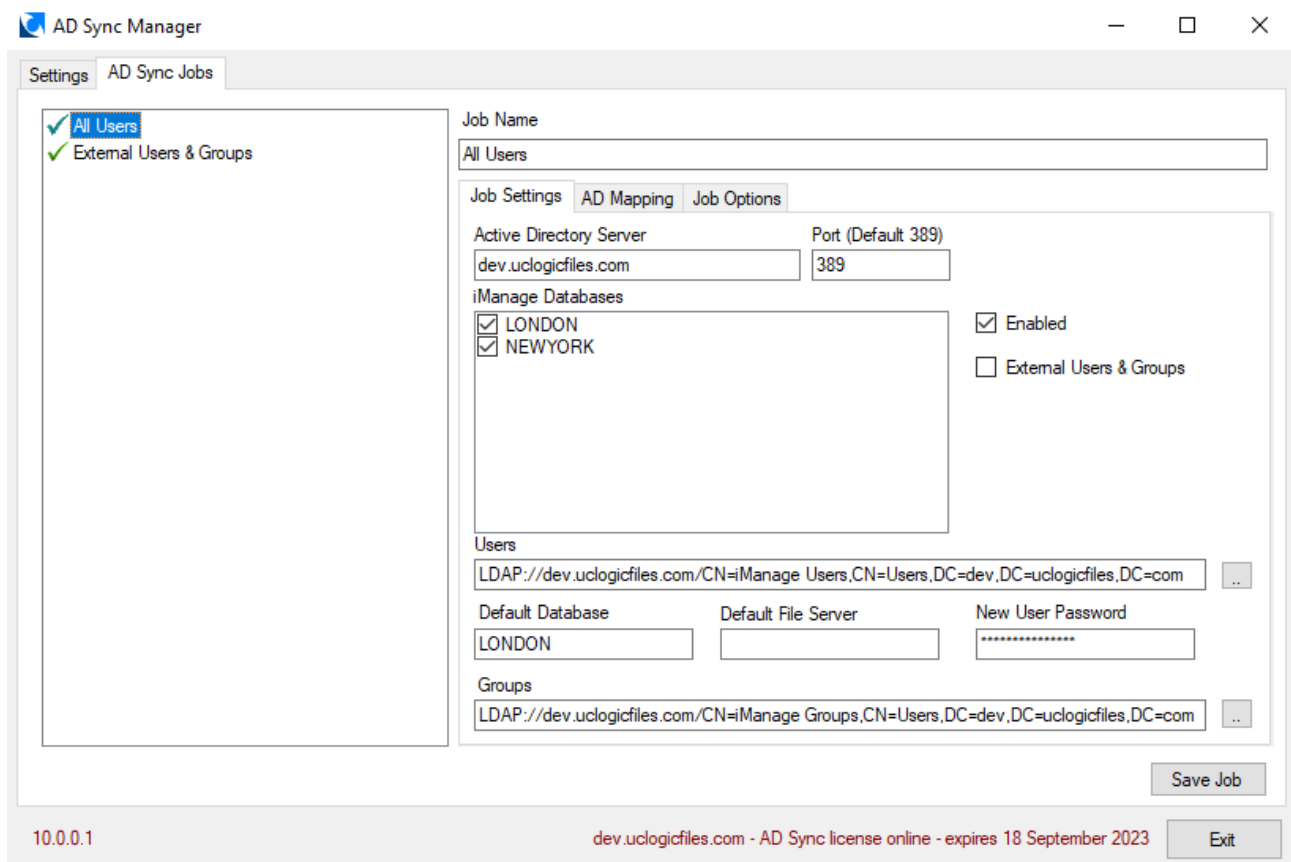
| Field	Description	Typical Values
Active Directory Server	The active directory domain name for the application to search	internal.uclogic.com or corp.uclogic.com
Port	Enter the port number to communicate with the LDAP Server	Default is 389
Users	An active directory group with a list of members that 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 used by the new user. If left blank the default DEFSERVER will be used	DEFSERVER
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 assign to new users	MATTERS
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	

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

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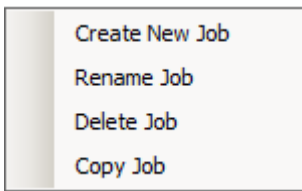
To create a new job, click Create New Job, then complete the fields in Job Settings and AD Sync Mapping before clicking Save Job.

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

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Click the AD Mappings tab to specify which Active directory fields should map to which Worksite fields
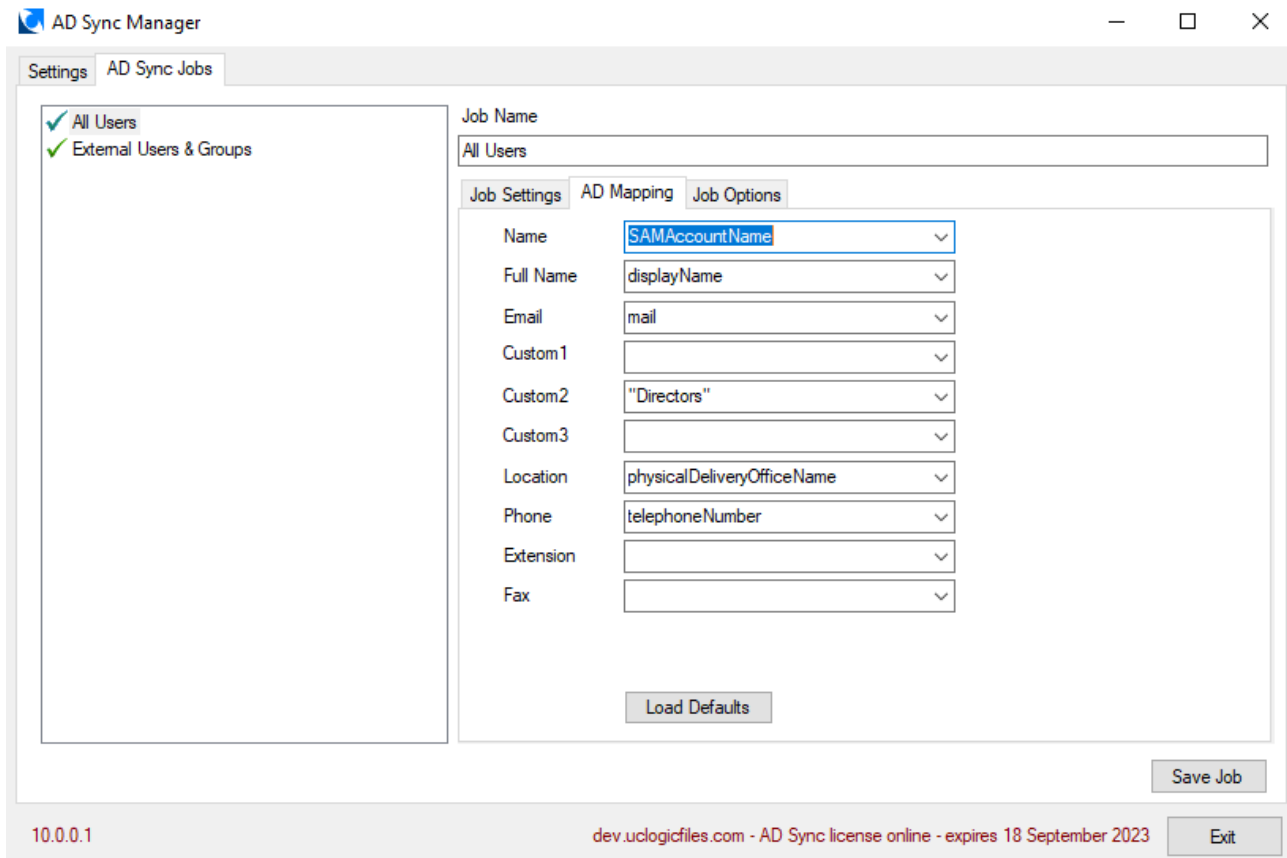
Some fields have recommended defaults. We suggest the Name is always mapped to SAMAccountName.

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%

Job options can be configured per job by clicking the Job Options tab
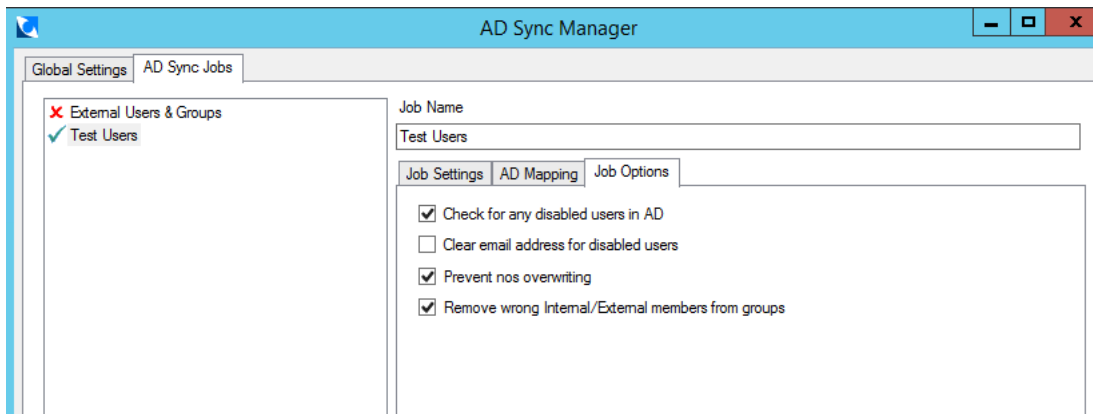
Use the "Check for any disabled users in AD" to disable any iManage users that have been disabled in Active Directory, even if the user account has been removed from the user synchronisation groups. This will apply to all databases selected for the job.

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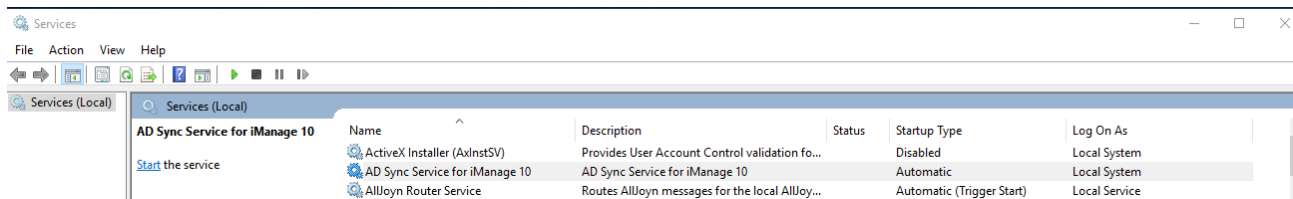
Any issues with starting the service will be logged to the event viewer, Windows Logs, Application.

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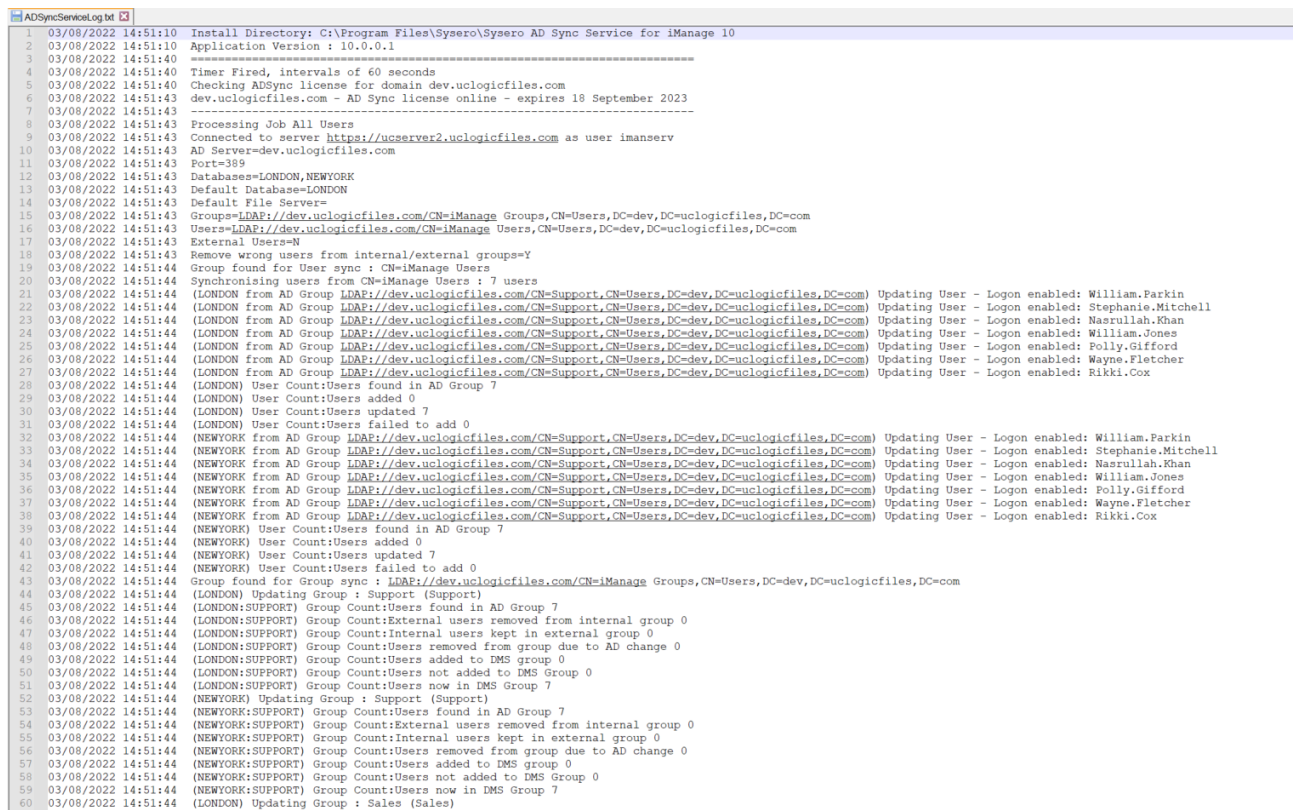
The log files show the application and job settings, plus a step by step progress report.

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 7
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:External users removed from internal group 0
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:Internal users kept in external group 0
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:Users removed from group due to AD change 0
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:Users added to DMS group 0
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:Users not added to DMS Group 0
03/08/2022 14:51:44   (LONDON:SUPPORT) Group Count:Users now in DMS Group 7
```

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