

# AD Sync Service

For iManage 10

Import Users and Groups from Active Directory

## AD Sync Service User Manual

Version 10.0



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## 1. Support

For support, please contact [support@uclogic.com](mailto:support@uclogic.com)

## 2. Updates

Version 10.0.1

2 August 2022

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Redeveloped for REST API iManage access

Not compatible with iManage cloud

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Version 9.11

8 Dec 2017

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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

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Version 9.10

3 December 2015

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Changed password encryption method for saving password in the registry. Fixes a Bad Data Cryptographic error

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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.

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Version 9.8

2 November 2015

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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  
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Version 9.6  
27 April 2015

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

Version 9.5.4  
22 October 2014

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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

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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  
11 August 2014

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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

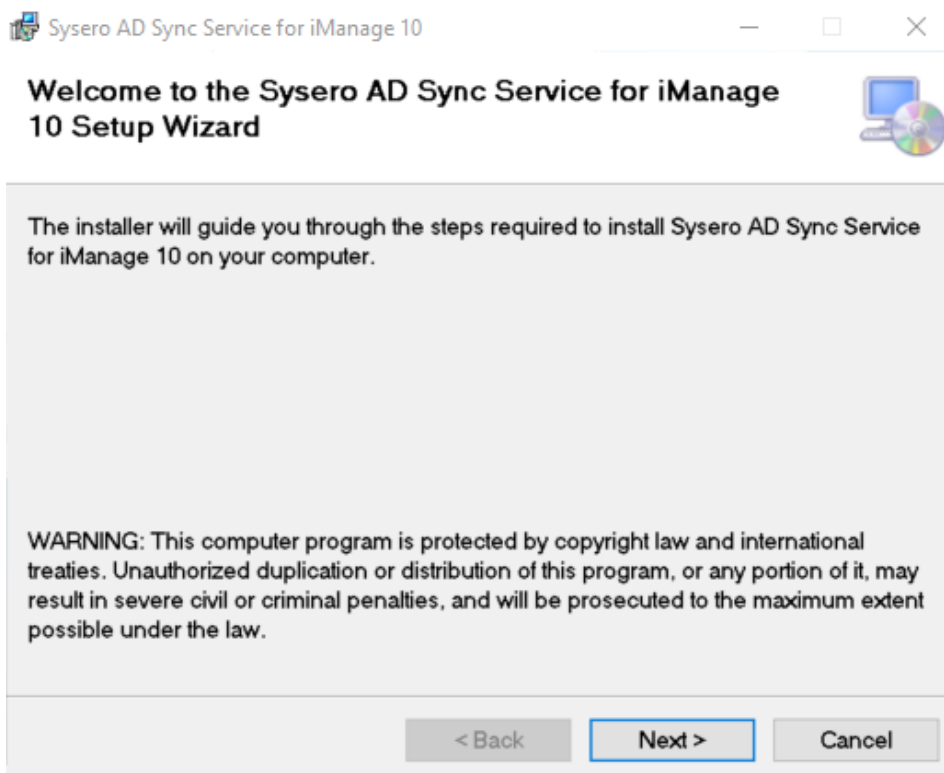
They should both be installed on the same server, ideally not on a server that runs any other Worksite server services.

Pre-requisites:

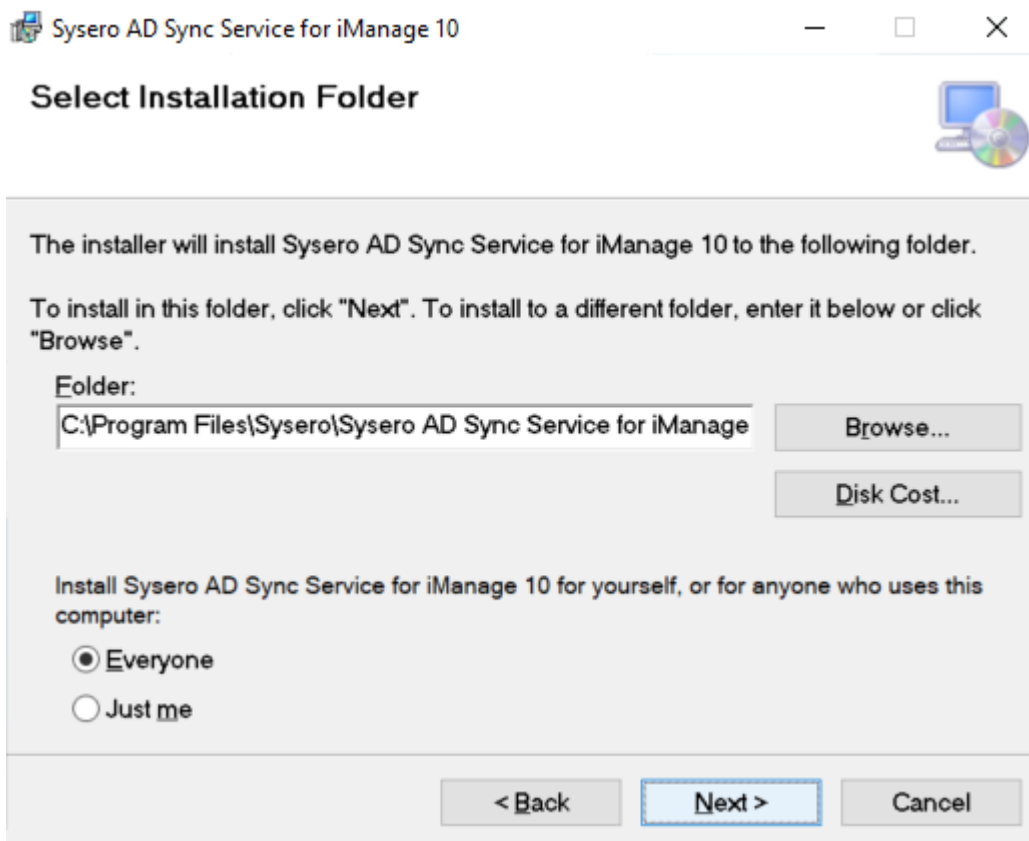
- Windows 2016/19 server, 64 bit, 4GB Ram
- Server must be part of the domain not a standalone/workgroup server
- iManage 10.2 Server or later

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

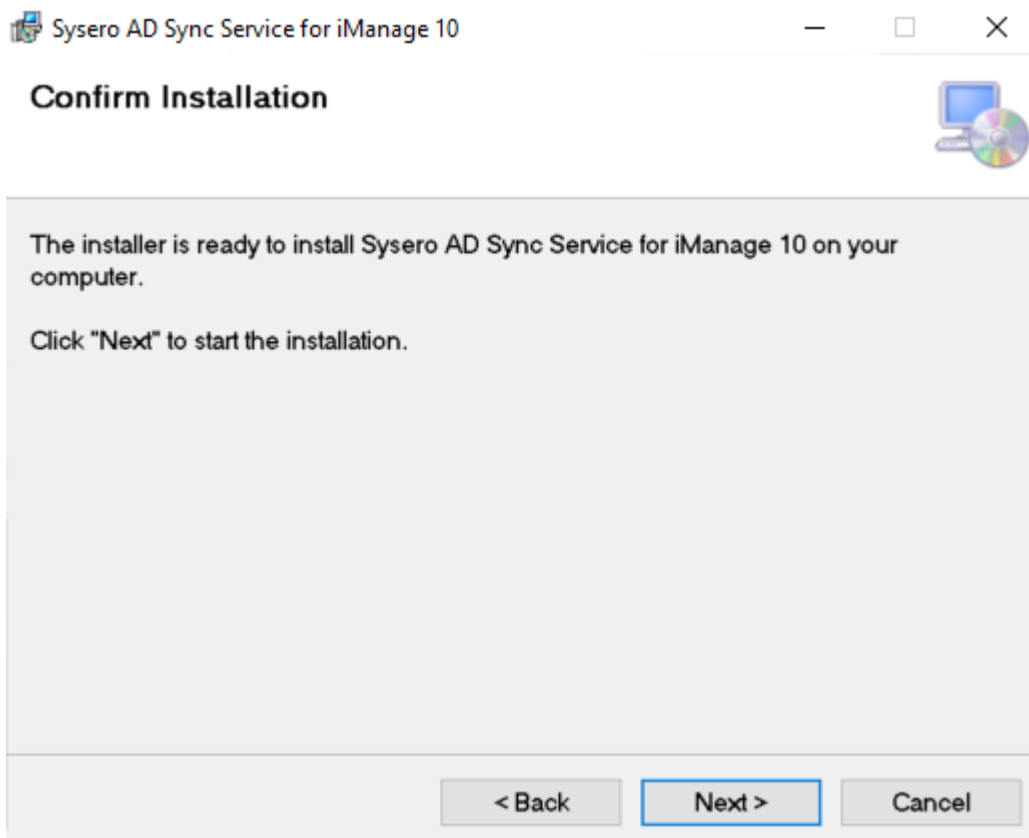
To install the AD Sync service applications, run the setup.exe application



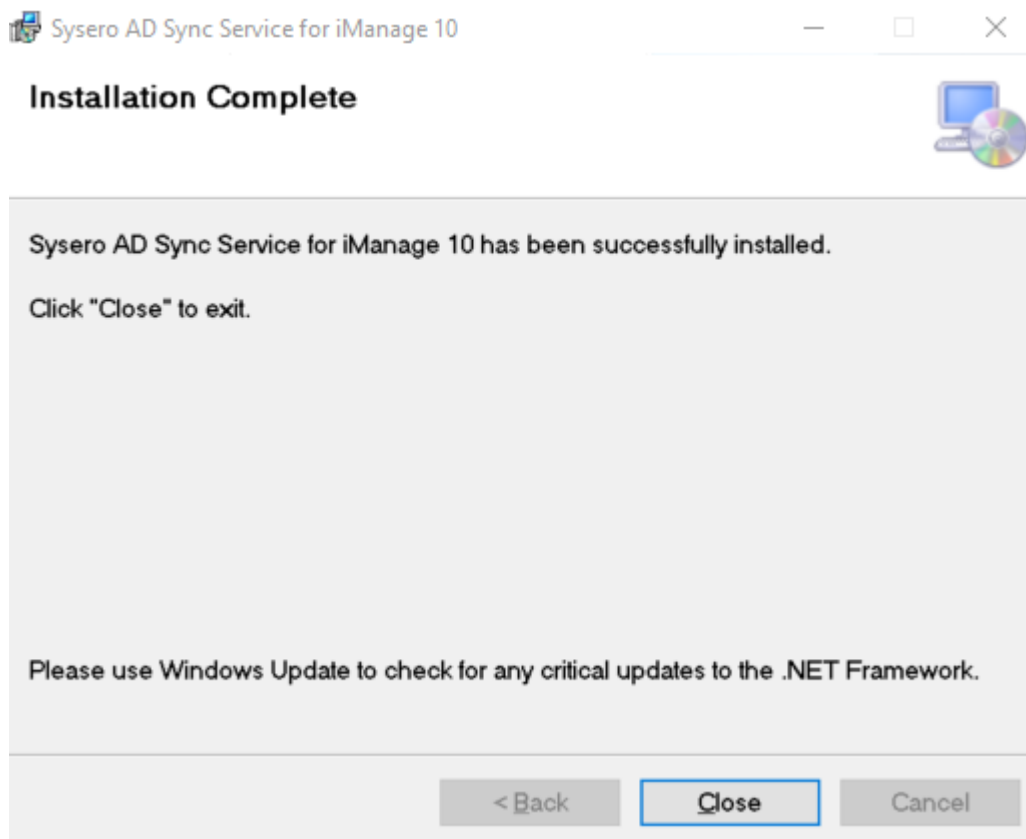
Click Next



Click Next

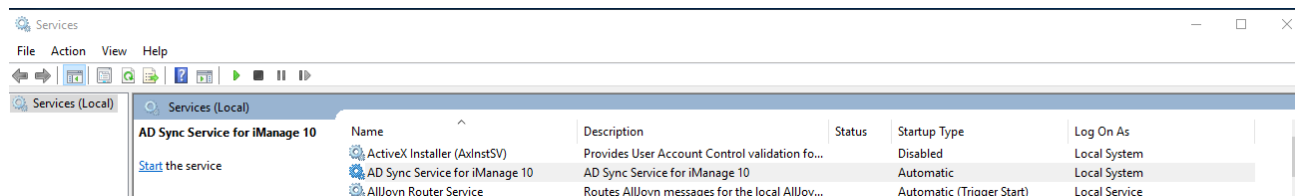


Click Next



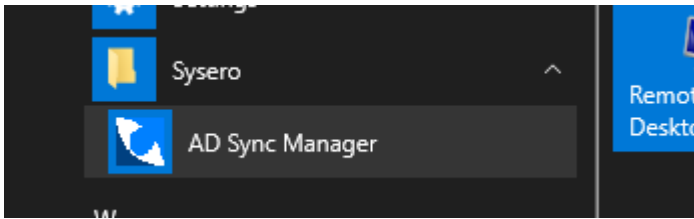
Click Close

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



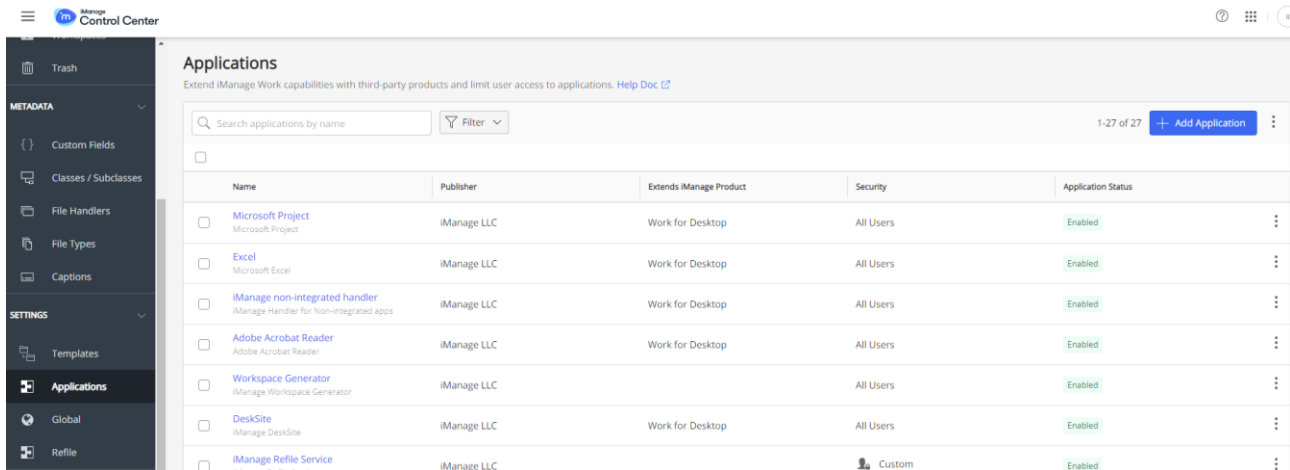
To configure the application, use the AD Sync Manager application.



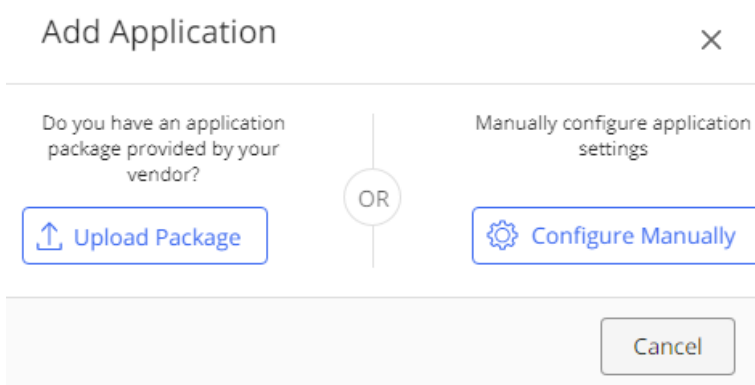
#### 4. iManage Server Configuration

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

## Click Authentication

### Add Application ×

✓

2

3

4

Configuration

Authentication

Access

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

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

### Add Application ✕

✓ Configuration

✓ Authentication

**3 Access**

4 Review

Allow access to ☐ All Users ☒ Custom

IMANSERV | imanserv iManage

✕

< Authentication

Review >

Cancel

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

<input type="checkbox"/>	ADSync	Sysero	Work for Desktop	Custom	Enabled
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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

**New Object - Group**

Create in: uclogic.com/Users

Group name:  
Worksite Users

Group name (pre-Windows 2000):  
Worksite Users

Group scope

- ☐ Domain local
- ☒ Global
- ☐ Universal

Group type

- ☐ Security
- ☒ Distribution

< Back   Next >   Cancel

Add the members you require.

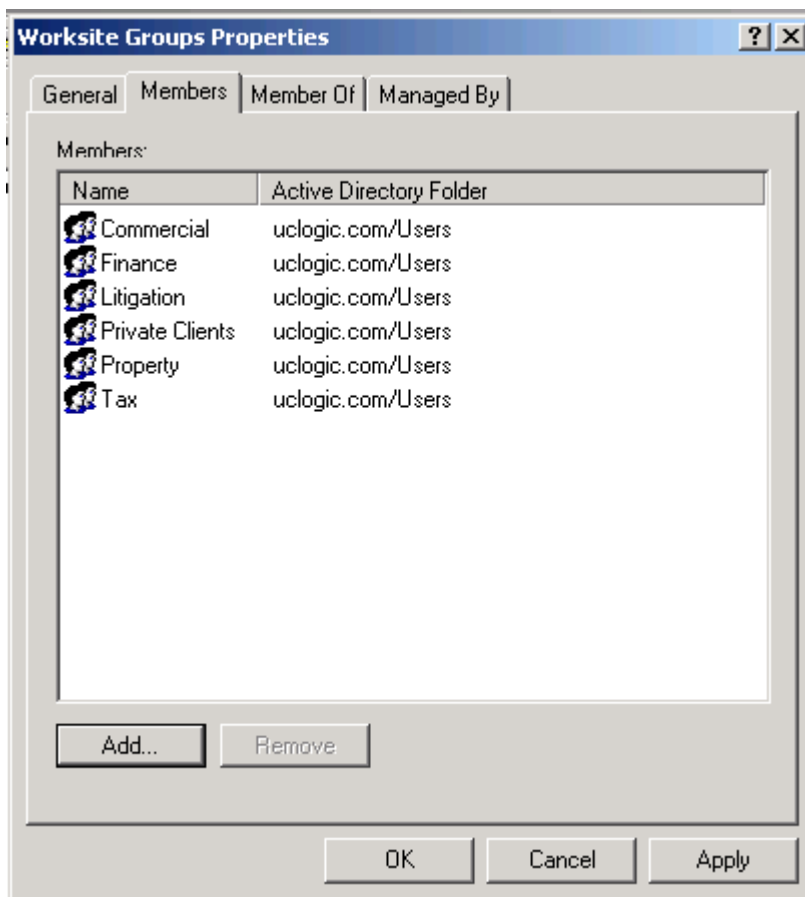
You may add subgroups to this group and AD Sync will get the members for all subgroups to calculate a list of users that need to include in the synchronise process. If a user appears in multiple sub groups, AD Sync will only add the user once.

**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.



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

AD Sync Manager

Settings AD Sync Jobs

Work Server URL

iManage User

Password

Interval (seconds)

Log File Location  ...

Max Log File size (Kb)  10 Mb

10.0.0.1 dev.uclogicfiles.com - AD Sync license online - expires 18 September 2023

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.

The screenshot shows the AD Sync Manager application window with the 'AD Sync Jobs' tab selected. The window has a title bar with the application name and standard window controls. Below the title bar, there are two tabs: 'Settings' and 'AD Sync Jobs'. The 'AD Sync Jobs' tab is active, displaying a configuration form for a job named 'All Users'. On the left side of the tab, there is a list of job types: 'All Users' (selected with a blue highlight and a checkmark) and 'External Users & Groups' (with a green checkmark). The main configuration area on the right contains several sections: 'Job Name' (set to 'All Users'), 'Job Settings' (with sub-tabs 'AD Mapping' and 'Job Options'), 'Active Directory Server' (set to 'dev.uclogicfiles.com') and 'Port (Default 389)' (set to '389'), 'iManage Databases' (a list box containing 'LONDON' and 'NEWYORK', both checked), 'Enabled' (checked checkbox), 'External Users & Groups' (unchecked checkbox), 'Users' (a text field containing an LDAP path and a browse button), 'Default Database' (set to 'LONDON'), 'Default File Server' (empty), 'New User Password' (masked with asterisks), 'Groups' (a text field containing an LDAP path and a browse button), and a 'Save Job' button at the bottom right. The status bar at the bottom of the window displays the version '10.0.0.1', the license information 'dev.uclogicfiles.com - AD Sync license online - expires 18 September 2023', and an 'Exit' button.

AD Sync Manager

Settings AD Sync Jobs

☒ All Users  
☒ External Users & Groups

Job Name  
All Users

Job Settings AD Mapping Job Options

Active Directory Server dev.uclogicfiles.com Port (Default 389) 389

iManage Databases  
☒ LONDON  
☒ NEWYORK

☒ Enabled  
☐ External Users & Groups

Users  
LDAP://dev.uclogicfiles.com/CN=iManage Users,CN=Users,DC=dev,DC=uclogicfiles,DC=com ..

Default Database LONDON Default File Server New User Password ..

Groups  
LDAP://dev.uclogicfiles.com/CN=iManage Groups,CN=Users,DC=dev,DC=uclogicfiles,DC=com ..

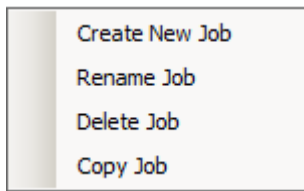
Save Job

10.0.0.1 dev.uclogicfiles.com - AD Sync license online - expires 18 September 2023 Exit



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 subgroups 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	

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



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

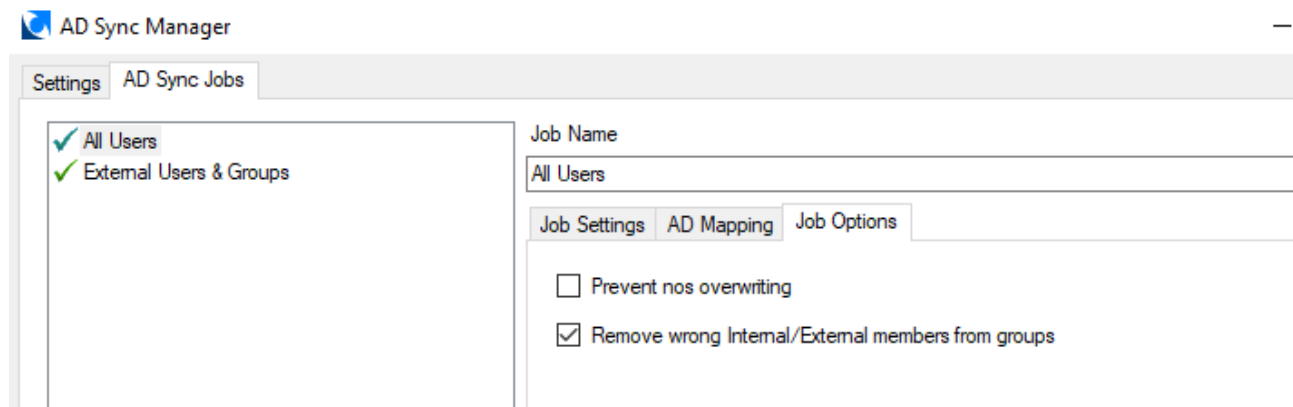
The screenshot shows the 'AD Sync Manager' application window. The 'AD Sync Jobs' tab is active. On the left, under 'Settings', 'All Users' and 'External Users & Groups' are checked. The main area is divided into three sub-tabs: 'Job Settings', 'AD Mapping' (which is selected), and 'Job Options'. Under 'AD Mapping', there is a list of fields to be mapped: Name, Full Name, Email, Custom1, Custom2, Custom3, Location, Phone, Extension, and Fax. Each field has a dropdown menu. The 'Name' dropdown is currently set to 'SAMAccountName'. The 'Full Name' dropdown is set to 'displayName'. The 'Email' dropdown is set to 'mail'. The 'Custom2' dropdown is set to '"Directors"'. The 'Location' dropdown is set to 'physicalDeliveryOfficeName'. The 'Phone' dropdown is set to 'telephoneNumber'. The 'Extension' and 'Fax' dropdowns are empty. At the bottom of the mapping section is a 'Load Defaults' button. At the bottom right of the window are 'Save Job' and 'Exit' buttons. The status bar at the very bottom shows the version '10.0.0.1', the license information 'dev.ucloudfiles.com - AD Sync license online - expires 18 September 2023', and the 'Exit' button.

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

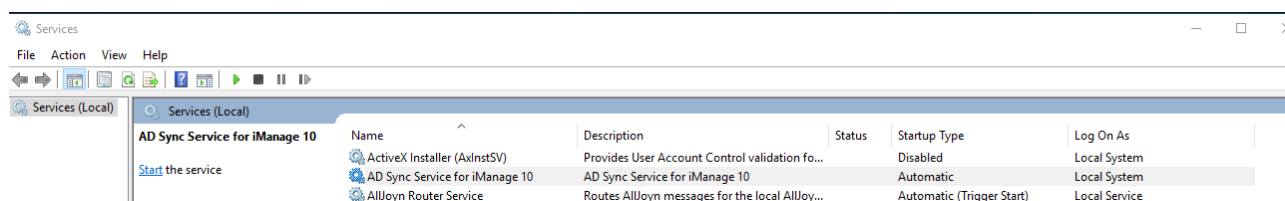


Prevent NOS Overwriting is used to stop the NOS value for each user from being overwritten every time the users are synchronised. In most cases you should leave this option unchecked.

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.

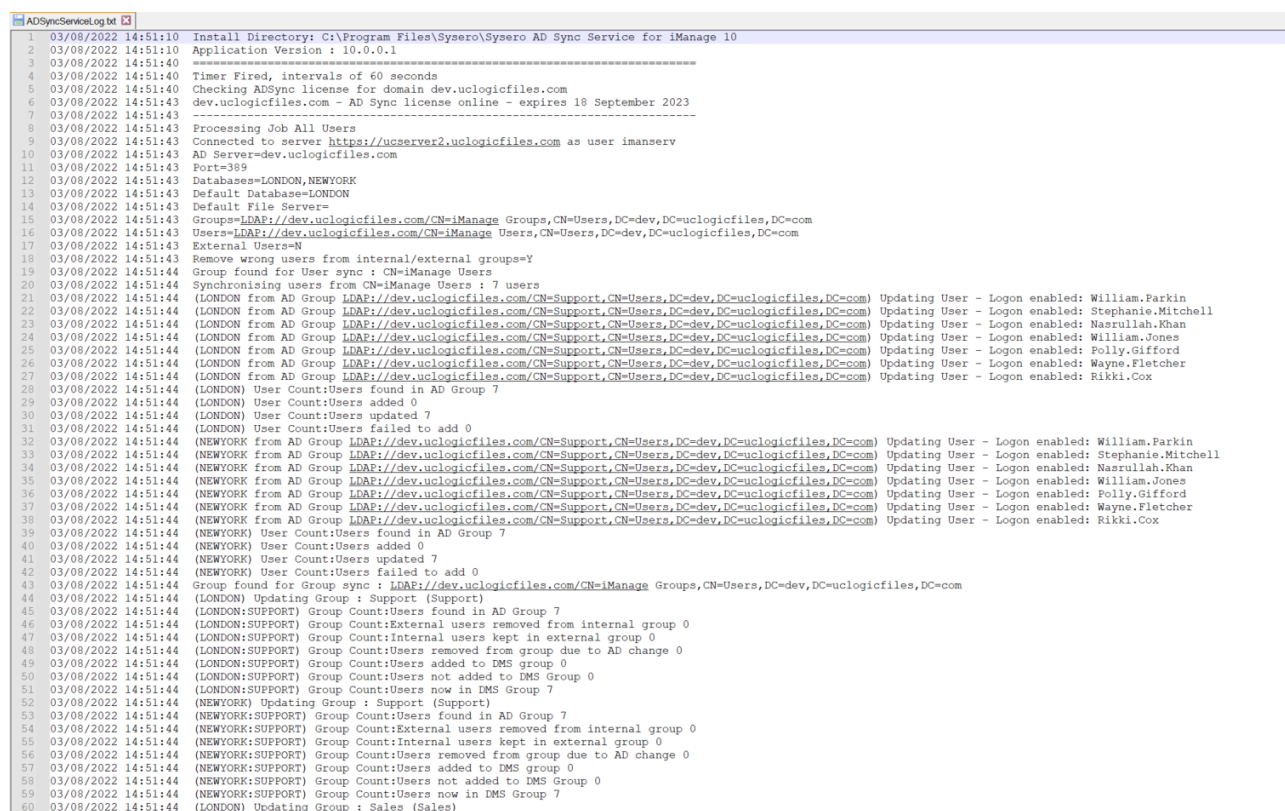
## Starting the Service

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.

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```
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
```