

APESOFT

Integration of DataCycle Reporting Users with Windows Active Directory Users

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INTRODUCTION

There are two methods to integrate DataCycle Reporting users with Active Directory Users:

MANUAL method: used onDemand. Allows to control which users are going to be synchronized.

AUTOMATIC method: scheduled process executed by DCServer. There is no visibility about what users are going to be affected.

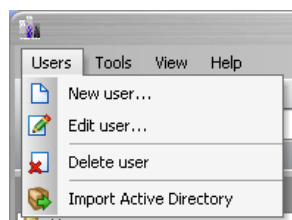
Since users importation from Active Directory is used to synchronize user data, and groups importation is used to associate users to groups, the order to proceed is first synchronize users and then groups.

MANUAL METHOD

Used onDemand. Allows controlling which users are going to be synchronized.

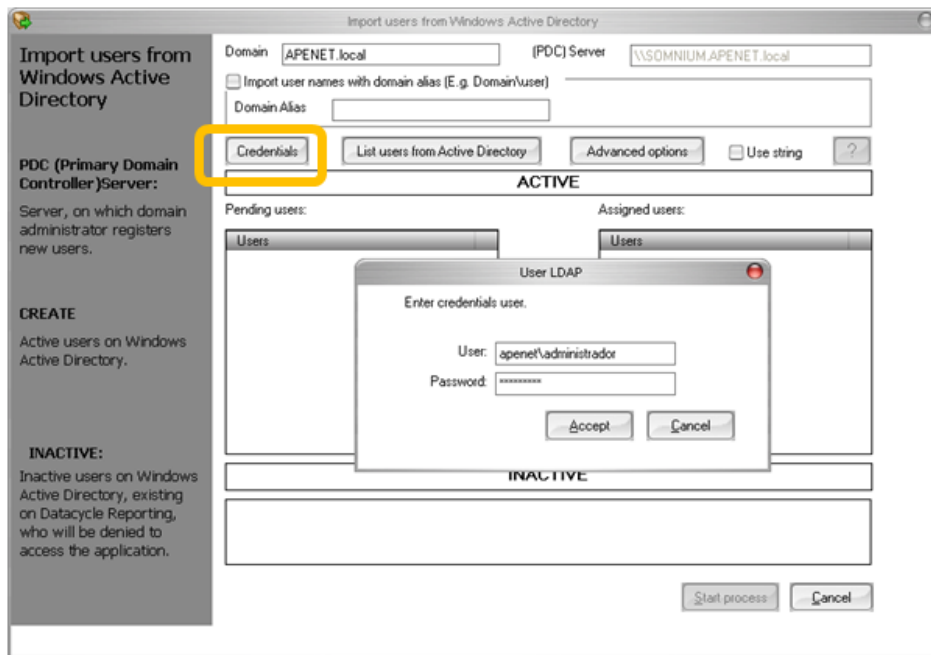
USERS SYNCHRONIZATION


Click on Settings, and then click on **Users > Import Active Directory**

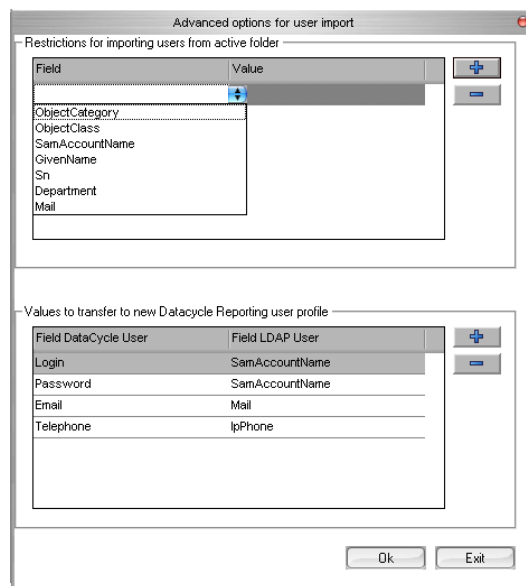


STEP 1: SELECT USERS

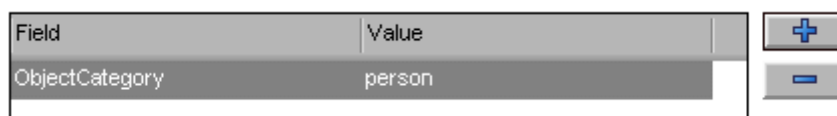
- Fill in **Domain** text box with network domain to connect
- Click on **Credentials** button, and enter a valid domain administrator login and password
- Then Close the window and then open it again, in order to **PDC (Server)** text box can be filled by DataCycle Reporting



- Click on **Advanced Options** and then click on  icon to add filters



- Add a filter to select only users from AD: select **ObjectCategory=person**

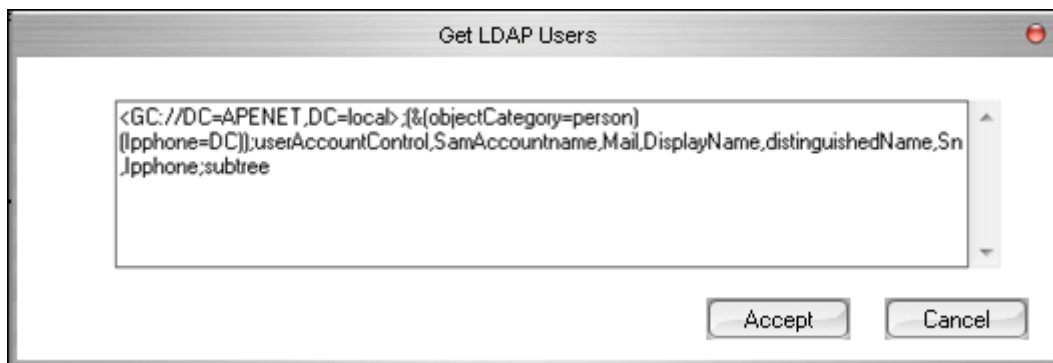


- Add other filters if needed (see Anex 1)

Example: if select the fields and values shown below, when listing users we will get all Marketing users

Field	Value
ObjectCategory	person
Department	Marketing

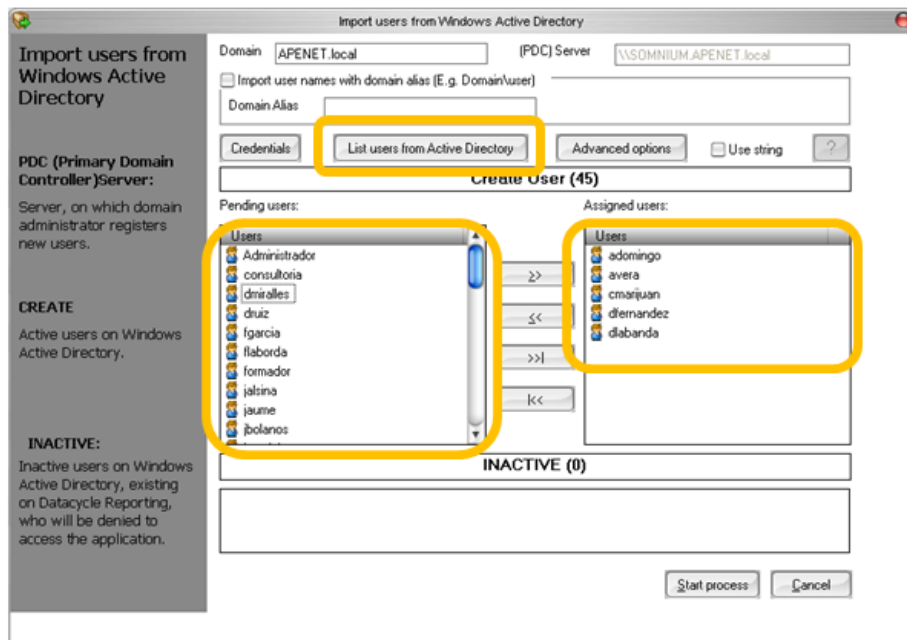
Another way to filter is using string by selecting **Use String** check box, and click on :



It is mandatory to place first domain field, and add “subtree” at the end of the string, in order to get different organizations if exist

Logical operators like “& -> AND, |-> OR y !-> NOT, and characters “*” o “?” can be used on the filter values.

Once we have finished filtering values, select **List Users from Active Directory** in order to get users list (filtered if any filterer was set). Then select which users are going to be synchronized:

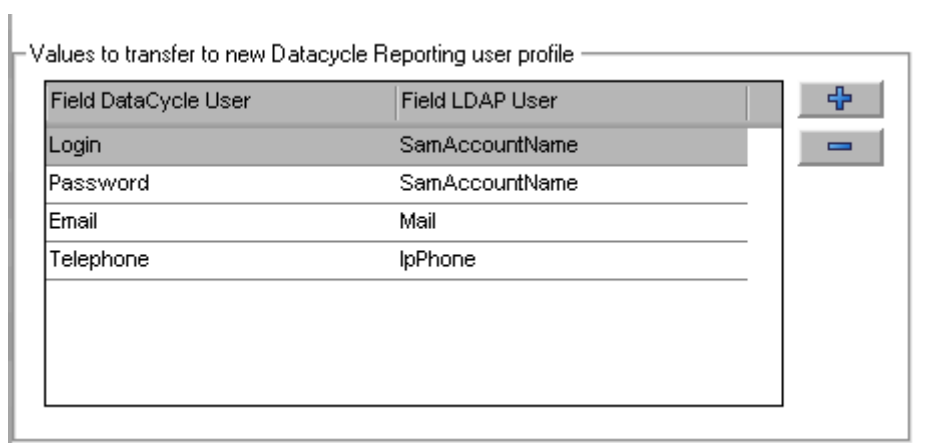


SamAccountName field from Active Directory is matched with **Login** field from DataCycle Reporting User Form.

All users placed into **INACTIVE** frame are users not active in Active Directory. These users will be removed from DataCycle Reporting if they are not used in a process or query.

STEP 2 – USER SYNCHRONIZATION

Once we have selected all users we want to synchronize, open again **Advanced Options** and check that LDAP values are correct. If you are not sure about what values are correct, keep the default values, select only one user to synchronize.



If you selects **Use String**, take into account the relationship between DCR and AD fields:

1 – [NO RELATIONTISHIP] domain

2- LOGIN y PASSWORD

3-EMAIL

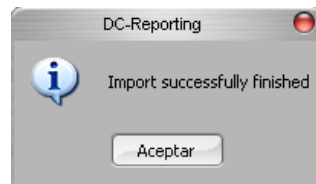
4-USER NAME

5-[NO RELATIONTISHIP]

6- COMMENTS

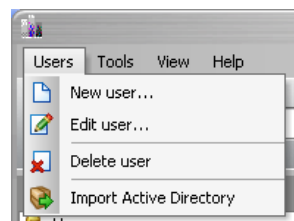
7-PHONE

Finally, select **Start Process** to synchronize. The following message will be shown if the process ends successfully




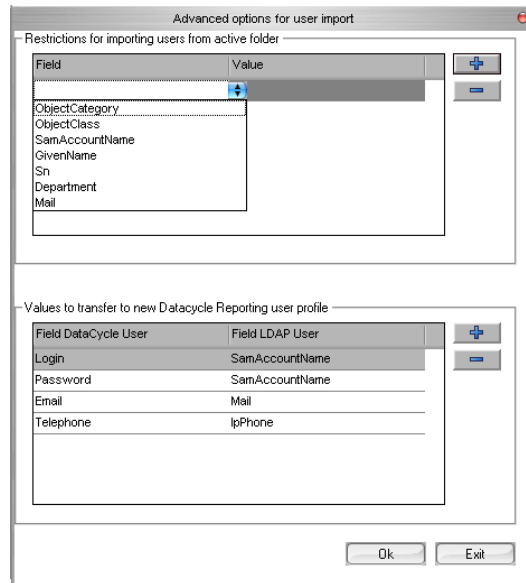
GROUP SYNCHRONIZATION

Click on Settings, and then click on **Users > Import Active Directory**

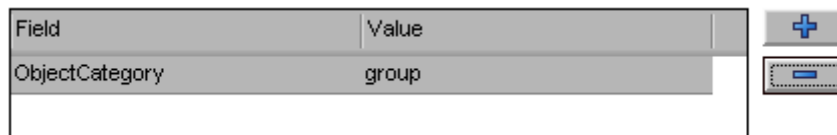


STEP 1: SELECT GROUPS


- Click on **Advanced Options** and then click on  icon to add filters



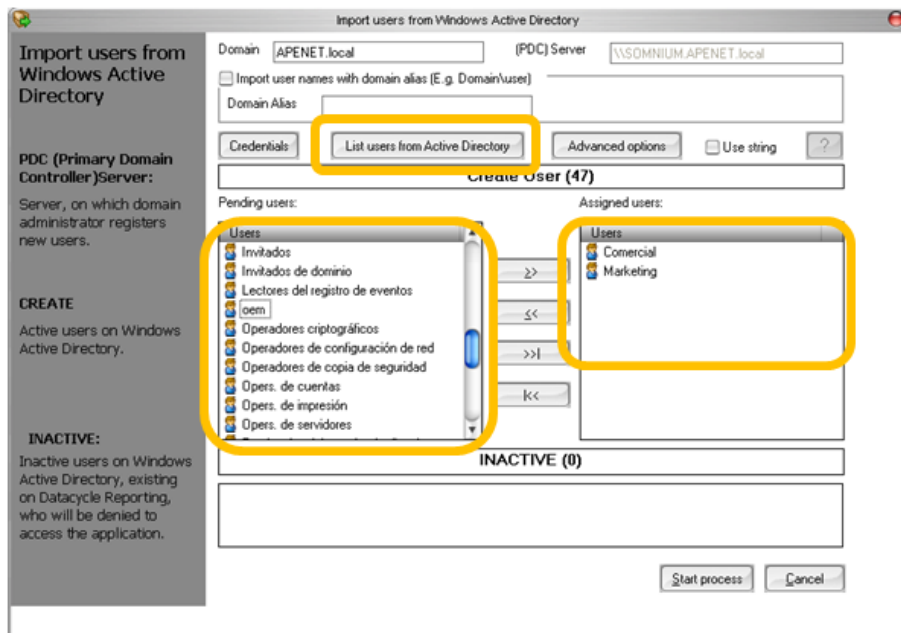
- Add a filter to select only users from AD: select **ObjectCategory=group**



- Add other filters if needed (see Anex 1)

If you choose manual by selecting **Use String** check box, and clicking on  icon, add **ObjectCategory=Group**, and select at least 6 fields.

Once we have finished filtering values, select **List Users from Active Directory** in order to get groups list (filtered if any filterer was set). Then select which groups are going to be synchronized:



STEP 2 – GROUP SYNCHRONIZATION

Once we have selected all groups we want to synchronize, open again **Advanced Options** and check that LDAP values are correct. If you are not sure about what values are correct, keep the default values, select only one user to synchronize.

Finally, select **Start Process** to synchronize. The following message will be shown if the process ends successfully




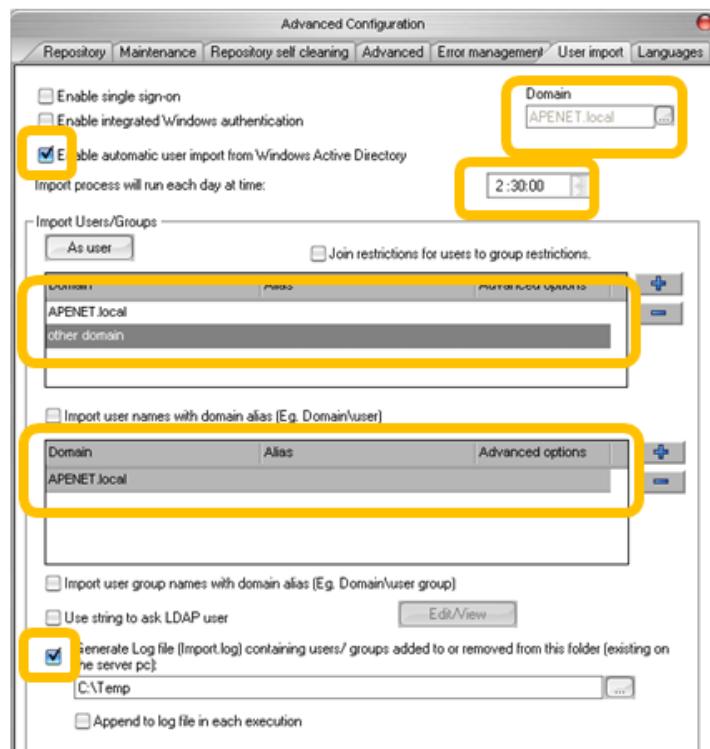
Existing groups in DataCycle Reporting will be updated with AD data.

AUTOMATIC METHOD

Scheduled process executed by DCServer, so this process must be running (DCServer.exe).
There is no visibility about what users are going to be affected

USERS AND GROUP SYNCHRONIZATION

- Click on menú **Tools > Advanced Configuration > User Import**
- Select domains and/or subdomains
- Select time to execute scheduled process
- Select **Enable automatic user import from Windows Active Directory**
- Click  icon to add our domain, both in users and group (if needed)
- Select path and file name to store Logs
- If you select **Join restrictions for users to group restrictions**, only users matching group restrictions will be synchronized.



This process will use same credentials and filters defined in the manual method. Therefore, although you need automatic method, it will be needed to follow step 1 for manual method.

Anex 1. Attributes LDAP most used

LDAP Attribute	Example
CN - Common Name	CN=Juan Taso. Actually, this LDAP attribute is made up from givenName joined to SN.
description	What you see in Active Directory Users and Computers. Not to be confused with displayName on the Users property sheet.
displayName	displayName = Juan Taso. If you script this property, be sure you understand which field you are configuring. DisplayName can be confused with CN or description.
DN - also distinguishedName	DN is simply the most important LDAP attribute. CN=Jay Jamieson, OU= Newport,DC=cp,DC=com
givenName	Firstname also called Christian name
homeDrive	Home Folder : connect. Tricky to configure
name	name = Juan Taso. Exactly the same as CN.
objectCategory	Defines the Active Directory Schema category. For example, objectCategory = Person
objectClass	objectClass = User. Also used for Computer, organizationalUnit, even container. Important top level container.
physicalDeliveryOfficeName	Office! on the user's General property sheet
profilePath	Roaming profile path: connect. Trick to set up
sAMAccountName	sAMAccountName = juant. Old NT 4.0 logon name, must be unique in the domain. Can be confused with CN.
SN	SN = Thomas. This would be referred to as last name or surname.
userAccountControl	Used to disable an account. A value of 514 disables the account, while 512 makes the account ready for logon.
userPrincipalName	userPrincipalName = juant@CP.com Often abbreviated to UPN, and looks like an email address. Very useful for logging on especially in a large Forest. Note UPN must be unique in the forest.