ADIS Manager and Service
Advanced User Manual

Version 6.1

DocuPhase Corporation
1499 Gulf to Bay Boulevard, Clearwater, FL  33755
Tel:  (727) 441-8228 – Fax: (727) 444-4419
Email:  support@DocuPhase.com
Web:  www.DocuPhase.com
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Introduction

Welcome to ADIS

The DocuPhase Active Directory Integration Service (ADIS) provides automatic synchronization between users and groups within a network domain’s Active Directory Service provided by Microsoft and the User and Group administration features in the DocuPhase solution.

This integration provided by ADIS establishes the ability to synchronize and manage users and groups in one location (the Microsoft Active Directory) rather than manage users and groups in both the Active Directory and in DocuPhase.

Synchronization also allows for Single Sign On functionality within the various components of the DocuPhase Platform.

With Single Sign On enabled, users only have to log into a Windows’ domain. Once successfully logged in, users will be able to run DocuPhase products without being required to log into each product.

Note: Prior to Release 6.0, ADIS was also able to integrate network users and groups defined within a LDAP (Lightweight Directory Access Protocol) domain such as a Novell Netware network and the User and Group administration features in the DocuPhase solution.

However due to lack of demand for this E-Directory LDAP-compatibility, this feature is no longer supported by ADIS.
Purpose and Assumptions

This manual has been written for the advanced user to prepare them to install and configure the ADIS product.

The following are assumptions made with regard to the reading audience for this guide:

- The reader has received at least one day of DocuPhase provided training.
- The reader has used the DocuPhase Platform for a period of no less than one month.
## Foundational Terminology

The purpose of this section is to provide basic reference terminology as a foundation for the concepts and explanations contained in this User Manual.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active Directory</strong></td>
<td>Active Directory (AD) is a centralized and standardized system that automates network management of user data, security and distributed resources and enables interoperation with other directories.</td>
</tr>
<tr>
<td><strong>DNS</strong></td>
<td>The Domain Name System (DNS) associates information with domain names. It is a hierarchical distributed database that contains mappings of DNS domain names to various types of data such as Internet Protocol address. It enables the location of computers and services by user friendly names and enables the discovery of other information stored in the database.</td>
</tr>
<tr>
<td><strong>DNS Domain Name</strong></td>
<td>The fully qualified name of your DNS tree.</td>
</tr>
<tr>
<td></td>
<td><em>For example, this might be DocuPhase.com or DocuPhase.loc.</em></td>
</tr>
<tr>
<td><strong>LDAP</strong></td>
<td>Lightweight Directory Access Protocol (LDAP) is an application protocol for accessing and maintaining distributed directory information services over an Internet Protocol (IP) network that is utilized by Novell Networks and others.</td>
</tr>
<tr>
<td></td>
<td><em>Note: Due to lack of demand for LDAP integrated features in ADIS prior to Release 6.0, this feature is no longer supported.</em></td>
</tr>
<tr>
<td><strong>Local Security Group</strong></td>
<td>Security groups are groups used to assign rights and permissions to users and subgroups. Corresponding groups exist in Active Directory (AD) and in DocuPhase.</td>
</tr>
<tr>
<td><strong>Subgroup</strong></td>
<td>Subgroups are groups that are nested within other AD groups. Active Directory subgroups inherit permissions of their parent groups.</td>
</tr>
<tr>
<td><strong>User Login Domain Name</strong></td>
<td>The name of a domain, excluding its suffix such as .com or .loc.</td>
</tr>
</tbody>
</table>
Client Support Services Contact Information

DocuPhase is committed to providing quality service and support for our customers. If you are experiencing difficulty with your DocuPhase software, please let us hear from you so we can help.

Client Support Services are provided as part of your Maintenance Program. Enhanced support programs are available upon request. The standard support feature set includes:

- Product Updates and Upgrades
- Telephone and Email support during local business hours
- Remote Connect Support during local business hours

You may:

- Contact us by email at support@DocuPhase.com.
- Reach us by phone at (727) 441-8228.
- Reach us by fax at (727) 444-4419.
- Find us online at www.DocuPhase.com/support.
ADIS Product Overview

The DocuPhase ADIS (Active Directory Integration Service) provides automatic synchronization between users and groups within a network domain’s Active Directory Service provided by Microsoft and those defined within the DocuPhase installation.

This provides the ability to manage users and groups in one location (i.e., the Active Directory) under the same names rather than manage users and groups in both Active Directory and DocuPhase since ADIS provides the means to accomplish frequent and automatic synchronization.

Synchronization also allows for Single Sign On functionality within the various products in the DocuPhase Suite.

With Single Sign On enabled, users only have to log into a Window’s domain. Once successfully logged in, users will be able to run products without being required to log into each product.

Integration with Active Directory and DocuPhase is accomplished by replicating, as well as constantly and automatically synchronizing Active Directory users and groups with the users and groups defined in DocuPhase.

The Active Directory Integration Service (ADIS) is a Windows service that identifies a user-defined local security group in Active Directory and automatically synchronizes all users and groups within that group with DocuPhase. The synchronization is a lightweight process, thus allowing synchronization to occur as frequently as every few minutes.

As an enhancement to improve tracking of Users and Groups, when removed they are now marked as ‘Disabled’ and the original names are retained to provide continuity for History, Tracking and Reporting.
ADIS Components

The ADIS product is comprised of two components:

**ADIS Manager.** Allows users to create and maintain an XML file that contains information required by ADIS Service to enable or disable the continuous synchronization of users and groups.

The ADIS Manager now allows the selection of multiple groups in a hierarchical structure within Active Directory. This addition of an extra level of grouping improves the way users may be grouped to better reflect organizational lines and simplify maintenance for Active Directory environments. See: Active Directory Nested Groups and DocuPhase Groups.

**ADIS Service.** The service uses the XML file generated by ADIS Manager to determine what Directory service to use to synchronize the users and groups, and how often to perform the synchronization. For more information on this topic see: User, Group and Group Membership Synchronization Rules.

When Single Sign On is enabled with Active Directory, ADIS continuously synchronizes users, groups and group memberships between a domain Directory and a DocuPhase database on a user-designated server.

**Note:** Single Sign On must be enabled for ADIS to update DocuPhase Users and Groups with Active Directory. Single Sign On is set within DocuPhase or by changing the value in the DocuPhase Database configuration table.

Please review the Enabling Single Sign On section in this manual for further information.
ADIS Manager Interface

The ADIS Manager interface allows you to enter information required by ADIS Service to allow the Active Directory (AD) users and groups to be continuously synchronized with DocuPhase users and groups.

Note: Prior to Release 6.0, ADIS was also able to integrate network users and groups defined within a LDAP (Lightweight Directory Access Protocol) domain such as a Novell Netware network and the User and Group administration features in the DocuPhase solution.

However due to lack of demand for this E-Directory LDAP-compatibility, this feature is no longer supported by ADIS.
The ADIS Manager Login Tab is comprised of the following components:

<table>
<thead>
<tr>
<th>Element</th>
<th>ADIS Manager Login Tab Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Menu</td>
<td>Features the Save (see Save Button below) and Exit options.</td>
</tr>
<tr>
<td>About</td>
<td>Evokes a window displaying the product version, file version and DocuPhase contact information.</td>
</tr>
<tr>
<td>User Login Domain Name</td>
<td>Defaults to the name of the domain that was used to log in to Windows by the current user. If this value is changed, a warning message will display, advising you to verify the entered value. The combination of this user login domain name and user login account name will be added to DocuPhase as a DocuPhase user name. (e.g., myDomain.myAccountName)</td>
</tr>
<tr>
<td>DNS Domain Name</td>
<td>Contains the full name of the domain server. The entered DNS Domain Name must consist of two or more parts with each part separated by a period. (e.g., domain.com)</td>
</tr>
<tr>
<td>User Name</td>
<td>Contains the domain account name of a user who has permission to access Active Directory User and Group information.</td>
</tr>
<tr>
<td>Password</td>
<td>Contains the domain login password for the user specified in the User Name field above.</td>
</tr>
<tr>
<td>Login</td>
<td>Provides the ability to login to the Active Directory, organizational units, groups and users.</td>
</tr>
<tr>
<td>DocuPhase (formerly iSynergy)</td>
<td>Contains the following fields that correspond to the server and user name entered when logging into ADIS Manager along with field update options for existing DocuPhase users.</td>
</tr>
<tr>
<td>Server (read only)</td>
<td>Displays the name of the server where the DocuPhase users and groups will be synchronized with Active Directory users and groups.</td>
</tr>
<tr>
<td>User Name (read only)</td>
<td>Displays the DocuPhase user with the proper permissions to add, delete and update DocuPhase users and groups.</td>
</tr>
<tr>
<td>Element</td>
<td>ADIS Manager Login Tab Description</td>
</tr>
<tr>
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</tr>
</tbody>
</table>
| **For Existing DocuPhase Users** | Check appropriate boxes to have DocuPhase information automatically updated from Active Directory. These checkboxes include:  
   - Update Full Name  
   - Update Email Address  
   - Update Account Enable/Disable  

*Note: For new DocuPhase Users, the three fields discussed above will always have these three associated fields initially updated from Active Directory.*  

| **Update Interval** | Contains the number of minutes that will elapse between each synchronization of users and groups by ADIS Service.  
*Note: DocuPhase best practice is to update every 6 hours (360 minutes).*                                                                                                                                                                                                                                                                                                                                                                           |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email Address</strong></td>
<td>Contains the email address of the recipient to be notified when ADIS Service performs an update of users.</td>
</tr>
<tr>
<td><strong>Error Only</strong></td>
<td>Provides the ability to send an email to the above only if an error occurs.</td>
</tr>
</tbody>
</table>
| **Save**            | Saves the information displayed in the ADIS Manager panel into an XML file. The default location and name of the XML file is:  

```plaintext
C:\Program Files\iDatix\Active Directory Integration Service\ADIS Manager\ADIS.xml
```

Additionally, After saving the xml file, in order for ADIS Service to start processing the information within it, you must copy the file to the directory where ADIS Service expects to find it. The default location to copy the xml file to is:  

```plaintext
C:\Program Files\iDatix\Active Directory Integration Service\ADIS Service
```

Furthermore, initially after installation, ADIS Service starts and will not find the ADIS.xml file. ADIS will continuously wait one minute until the file is copied into the ADIS Service folder. Once the xml file is copied, processing will occur based on the minutes entered in the **Update Interval** field.  


Element | ADIS Manager Login Tab Description
--- | ---
Exit | Exits ADIS Manager. If changes were made, a prompt will display asking whether or not to save the information entered.

- Selecting **Yes** will save the information and exit ADIS Manager.
- Selecting **No** will not save the information and exit ADIS Manager.
- Selecting **Cancel** will cancel the Exit Program and allow you to make further changes on the ADIS Manager panel.

Disabling and Re-Enabling DocuPhase Users

As of DocuPhase Release 6.0 DocuPhase users are no longer removed, they are simply marked as ‘Disabled’ to preserve the integrity of user names in DocuPhase and Progression transaction logs and user history.

*Note: In Fact as of the DocuPhase 6.0 release, there is no ‘Delete User’ action available.*

Since DocuPhase users can be added explicitly via DocuPhase as well as automatically acquired from the Active Directory (AD) defined users and synchronized, it is important to briefly review how DocuPhase is able to disable and re-enable users, but never remove them.

Typically, a DocuPhase user account is explicitly disabled from its User Details page using the Disable button, as illustrated below.

![Image of DocuPhase User Details page showing the Disable button and the associated messages: The Username Is ‘Read Only’ Preventing the User Account from being Renamed and The Disable Button Sets the User’s Login Expiration = ‘Disable Account’]
After confirming the Disable button action, DocuPhase renders the User as ‘Disabled’ by setting his/her Login Expiration setting to ‘Disable Account’ preventing them from logging into DocuPhase until this setting is changed, as shown below.

Once a DocuPhase user is disabled, it is no longer visible by default on the User Configuration page, as shown in the illustration above.

However, they can be optionally displayed when the ‘Show disabled users’ option checkbox is checked, shown in the following example.

The Disabled User is flagged and listed with the Enabled Users on the User Configuration page when the ‘Show disabled users’ option is checkmarked – The disabled usernames are flagged with the qualifier "(disabled)".

Clicking the Padlock icon ( ), opens this User’s Permissions page showing the current setting of ‘Delete Account’ in the Login Expiration dropdown which can be reset to another setting such as ‘Never Expires’ to Re-Enable this User, as illustrated below.
Renaming and Deleting DocuPhase Groups

Unlike DocuPhase Users, DocuPhase Groups can be Renamed at any time, as long as their intended new group-name is not already being used, without altering the group’s membership assignments. Also, a named Group can be deleted.

Once a Group is Deleted it is removed and an ‘Add Group’ operation or a ‘Rename Group’ operation can re-use a previously-deleted group’s name.
User, Group and Group Membership Synchronization

Administrators can now select multiple groups or Organizational units in Active Directory (AD). ADIS Manager supports the synchronization of both global AD and local DocuPhase groups.

The ADIS Manager 'Org. Units & Groups' tab provides the means to synchronize Active Directory Domain groups and user definitions with DocuPhase groups and user definitions.

The table below provides a description of this tab's components.

<table>
<thead>
<tr>
<th>Element</th>
<th>ADIS Manager Org. Units &amp; Groups Tab Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain Panel</td>
<td>This panel presents a tree-structured list of Domains which are the Organizational Units or Groups defined in Active Directory (AD) and their AD Domain Members (i.e., AD user names). Using the Checkbox, Domain Groups as well as Member Users may be activated (i.e., ✅) or deactivated (i.e., ❌).</td>
</tr>
<tr>
<td>Element</td>
<td>ADIS Manager Org. Units &amp; Groups Tab Description</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>DocuPhase Panel</td>
<td>This panel provides two tabs for Linking/Unlinking DocuPhase Groups and DocuPhase Users with their AD counterparts to establish synchronization.</td>
</tr>
</tbody>
</table>
| **Groups Tab**   | This Tab in the DocuPhase panel and allows the administrator to establish links between AD Organizational Units or Groups and DocuPhase User Groups.  
  
  Note: The functioning of the Groups Tab is very similar to the way synchronization is established and maintained for the Users Tab. |
| **Users Tab**    | This Tab in the DocuPhase panel and allows the administrator to establish links between AD Users and DocuPhase Users.  
  
  As AD Users are matched with selected DocuPhase Users the corresponding user names are listed in table rows along with their ‘Link Status’ control, as shown below.  
  
  Note: During the iSynergy to DocuPhase transition for 6.0, iSynergy will appear here instead of DocuPhase. |
| **Link control** | This column displays a control in each row that allows you to view and edit the synchronized AD/DocuPhase User properties.  
  
  Clicking the Link control opens the Link to User window allowing you to complete or edit the synchronized User definition.  
  
  See the ‘Link to User’ pop-up window entry 2-rows below in this table. |
<table>
<thead>
<tr>
<th>Element</th>
<th>ADIS Manager Org. Units &amp; Groups Tab Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>This column displays the status of the synchronization link between the AD user and DocuPhase user definition. A ‘New’ status has not been associated with a Corresponding DocuPhase User, yet – So the DocuPhase User entry is blank and the Status field displays ‘New’.</td>
</tr>
<tr>
<td><strong>Link to User window:</strong></td>
<td>This pop-up window appears when the Link control is clicked in a selected row.</td>
</tr>
<tr>
<td></td>
<td>- When a row has a Status of ‘New’, this window appears allowing the corresponding DocuPhase user for its AD user entry to be selected and any other properties completed or edited.</td>
</tr>
<tr>
<td></td>
<td>- With any other Status in a row, clicking its Link control displays this ‘Link to User’ window allowing its properties to be edited.</td>
</tr>
<tr>
<td><strong>Directory User</strong></td>
<td>This display-only field contains the AD Directory User name that is being synchronized and its Email address property maintained.</td>
</tr>
<tr>
<td>Element</td>
<td>ADIS Manager Org. Units &amp; Groups Tab Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>This field is used to enter/display the Email address that is to be associated with this synchronized AD/DocuPhase user (e.g., <a href="mailto:JDoe@DocuPhase.com">JDoe@DocuPhase.com</a>).</td>
</tr>
<tr>
<td><strong>DocuPhase User Selection List</strong></td>
<td>This list of DocuPhase Names is used to select the name that correspond to the AD Directory User in order to establish the desired synchronization to make the AD and DocuPhase component function as one user entity. After selection the corresponding items appear side by side in the DocuPhase panel table, as shown below.</td>
</tr>
<tr>
<td><img src="image" alt="DocuPhase User Selection List" /></td>
<td></td>
</tr>
<tr>
<td><strong>Update Information:</strong></td>
<td>This display-only panel presents information on updates to the combined AD/DocuPhase User definition, as shown.</td>
</tr>
</tbody>
</table>
**Element** | **ADIS Manager Org. Units & Groups Tab Description**
--- | ---
**User Information:** | This display-only panel presents information on the combined AD/DocuPhase User definition:
- Email Address
- FullName
- Name
The Email Address may be maintained from either ADIS or DocuPhase and the remaining names show the DocuPhase preferences 'User Details' tab settings, as shown and highlighted below:

<table>
<thead>
<tr>
<th><img src="image" alt="User Information" /></th>
</tr>
</thead>
</table>

| Delete Original User | By selecting one or more users listed in the panel on the left of the ‘Link to User’ window, checking (✓) this checkbox and clicking the OK button allows you to delete the original DocuPhase user(s) selected. |

| Unlink button | This button allows you to break the current linkage between an AD User and a DocuPhase definition. |

| Reset button | This button allows you to reset the current Link and Email address to a previous setting. |

| OK button | This button allows you to complete making a new Link association between and AD User and a DocuPhase definition and/or change in the Email address property. |

| Cancel button | This button allows you to exit the ‘Link to User’ dialog window and discard all pending changes. |

After ADIS AD/DocuPhase user and group synchronization is configured, the ADIS Manager’s ‘DocuPhase Users & Groups’ tab displays scrollable summary panels for:
- Groups,
- Group Memberships, and
- Users.
The ADIS Manager also provides buttons for Save and Exit to retain or discard pending changes before exiting.
ADIS Synchronization Rules

Synchronization between Active Directory and DocuPhase users, groups and group memberships will occur according to the following rules:

- ADIS synchronizes groups by comparing an Active Directory group name with a DocuPhase group name when determining whether a group exists.
- ADIS synchronizes users by comparing the combination of an Active Directory domain name and account names separated by a period with a DocuPhase user name (e.g., domainName.accountName).

**Note:** The only DocuPhase user that will not be synchronized with Active Directory is the sysadmin user.

ADIS will not make any changes to sysadmin, except for the following condition: If sysadmin is a member of a DocuPhase group that is subsequently deleted from DocuPhase because it does not exist within Active Directory, the group will continue to be deleted although sysadmin is a member.

- If a group exists in the Active Directory, but not in DocuPhase, the group will be added to DocuPhase.
- If a user exists in Active Directory but not in DocuPhase, the user will be added to DocuPhase. The new DocuPhase user name is the combination of the Active Directory domain name and account name separated by a period (e.g., domainName.mSmith).

  **Note:** If a user’s AD account is disabled within Active Directory, the user will not be added to DocuPhase. The DocuPhase password assigned by ADIS to a new user is an encrypted random value unknown to the user.

- If an existing DocuPhase user requires a password in order to log into a DocuPhase product that requires a manual login (i.e., does not support Single Sign On), a password can be assigned by the DocuPhase administrator from within DocuPhase. ADIS will not override passwords assigned to existing DocuPhase users.
- If a user exists in Active Directory and DocuPhase, the following DocuPhase User fields will optionally be updated from Active Directory: Full Name, Email and Enable/Disable User (Login Expiration). Whether one or more of these fields is updated is dependent on which checkboxes are selected on the ADIS Manager interface.

**Note:** Enabling and disabling a DocuPhase user is set by changing the value of the DocuPhase Login Expiration field.
Login Expiration will only be synchronized with Active Directory when the following occurs:

- When an existing user changes from enabled to disabled within Active Directory, the Login Expiration will be set to ‘Disable Account’.

- When an existing user changes from disabled to enabled within Active Directory, the Login Expiration will be set to ‘Never Expires’.

- If a DocuPhase administrator sets a password for an existing DocuPhase user, ADIS will not override that password or the Login Expiration assigned by the administrator. However, if that user becomes disabled within Active Directory, ADIS will override the Login Expiration and set it to ‘Disable Account’.

- When an existing user changes from disabled to enabled within Active Directory, the Login Expiration will be set to ‘Never Expires’ by default. However, the setting can be reconfigured.

- Users and Groups created within DocuPhase will no longer be automatically removed, if they do not exist in Active Directory.
Active Directory Nested Groups & DocuPhase Groups

The ability to nest subgroups within groups of users in Active Directory (AD) improves the organization and administration of users.

With ADIS, DocuPhase has the ability to accommodate multiple levels of nested Active Directory subgroups as well as detect, warn and protect against recursive group definition failures.

The following example shows the Active Directory (AD) groups in the left panel and the corresponding DocuPhase groups in the right panel. The AD panel contains a Group named “QaGroup1” with two (2) users and a nested Sub-Group named “sub Group” with three (3) users defined.

Notice that the DocuPhase Group named “QaGroup1” appears in the right pane and contains the five (5) users in the AD Group plus all of its nested sub-groups.

Note: In this example there is only one (1) AD subgroup present in the parent group, but should multiple levels of nested subgroups be present – All users in the nested subgroups would have been combined under the parent DocuPhase Group.

As a result, added levels of AD groups improves the organizational and administrative convenience available in the Active Directory while each corresponding Group in DocuPhase is able to contain all of its users combined into a single-level group for ease of administration in DocuPhase.
Running ADIS Service Tips

The following are tips to consider when running ADIS Service.

- ADIS Service can be run in one of three different modes: as a service, console mode or test mode.
- Prior to running ADIS Service, ensure you have a valid backup of your DocuPhase database in the event a restore of your current DocuPhase user and group configurations is necessary.
- When running ADIS Service for the first time, it is strongly recommended that it be run in Test mode first.

**Note:** This will allow you to see the results of an actual synchronization to verify that the correct users, groups and group membership updates take place within DocuPhase.

**Note:** If you are going to run ADIS Service in Console Mode or Test Mode, it is necessary to stop and/or disable ADIS from running as a Service.

Please refer to Microsoft Windows documentation for more information on using Microsoft Management Console® for managing Windows Services.

- If the adis.xml file generated from ADIS Manager has not been copied to the location ADIS Service expects to find it, ADIS Service will wait one minute until the adis.xml file is found.

**Note:** The default directory ADIS Service expects the xml file to be located in is:

C:\Program Files\iDatix\Active Directory Integration Service\ADIS Service

- Any program execution errors, including missing or invalid license errors, are detailed in the ADIS Service application log file which is located at:  
  
  C:\Program Files\iDatix\Logs\ADIS_Service.log

- If ADIS Service fails to execute due to an invalid or no license, once a valid license is obtained, you must stop and restart ADIS Service.
- After copying the adis.xml file to the location where ADIS Service expects to find it, it is not necessary to stop and restart ADIS Service.

**Note:** The service will automatically pick up the xml file on the next update interval. ADIS Service will write any Active Directory/DocuPhase synchronization updates that occur to an activity log file.

Review the ADIS Manager section for maintaining and saving the adis.xml file and user, group and group membership rules.
Running As a Service

Running as a Service is the default mode in which ADIS Service will operate after installation. This operation mode will immediately start upon installation completion.

Running In Console Mode

To run ADIS Service in console mode:
- Open a Command Prompt window within Windows.
- Navigate to the directory where the ADISService.exe file is located using the cd command.
- Run ADISService.exe with the -console parameter.

Note: Upon successful program execution, the following will display in the Command Prompt window.

Note: ADIS Service can be stopped by pressing Enter.
Running in Test Mode

When running ADIS Service in Test mode, no synchronization of users and groups will take place. ADIS Service will write to the activity log file any additions, changes or deletions that will occur using the current configuration when ADIS Service is run normally.

*Note: See Activity Log File (referenced below) for further details.*

To run ADIS Service in test mode, follow the below steps:

- Open a **Command Prompt** window within Windows.
- Navigate to the directory where the **ADISService.exe** file is located using the `cd` command.
- Run **ADISService.exe** with the **–console** and **–test** parameters.

Upon successful program execution, the following will display in the Command Prompt window.

*Note: ADIS Service can be stopped by pressing Enter.*
Activity Log File

The first time ADIS Service is run, a log file is created. This log file contains any updates that occur during user and group synchronization.

If ADIS Service is run in “test” mode, the log file will contain entries of what will occur when run in non-test mode. These entries will be noted in the log file that ADIS Service is running in test mode.

The first time ADIS Service is run, a log file is created. This log file contains any updates that occur during user and group synchronization.

The default directory location and name of the activity log file is:

C:\ProgramData\iDatix\ADIS\activity.log

Sample Log File.

[12/18/2004 10:00:02 AM] Group GroupA added to iSynergy.
[12/18/2004 10:00:02 AM] Group GroupB added to iSynergy.
[12/18/2004 10:07:05 AM] User Development.Charleston modified. Field: Email Old Value: Charleston@abc.com New Value: Charleston@def.com
Appendix A: ADIS Installation

Prerequisites & Minimum Requirements
The following ADIS installation consideration topics are documented in the following locations:

- **Minimum Requirements:** See DocuPhase Prerequisites Guide
- **Prerequisites:** See DocuPhase Prerequisites Guide
- **ADIS Installation from .MSI:**
  - ADIS Manager
  - ADIS Service

Restrictions
The following information lists the current Restrictions when utilizing ADIS.

- The user that will run ADIS Manager must log into Windows as domain\user.
- The user that runs the ADIS Service must be a member of the Windows domain and have permission to access Active Directory Information.
- ADIS does not support mixed mode, or adding some users via DocuPhase and some users via Active Directory.

**Note:** All users and groups that will be accessing DocuPhase must be set up within an Active Directory Local Security Group, or organizational units, and not DocuPhase. Any users and groups that exist in DocuPhase and not Active Directory will be removed from DocuPhase.

- ADIS support for Active Directory subgroups is limited to incorporating subgroup members into a DocuPhase top-level parent group. ADIS does not establish corresponding subgroups in DocuPhase Groups.
  
  For example, if the Active Directory local security group contains Group A, which also contains a nested Group B, Group B will not appear as a nested group in DocuPhase; However, the users in Group B will be added to the parent Group A in DocuPhase.

- Any DocuPhase user and/or group permissions must be assigned from within DocuPhase.

The only exception to the restrictions listed above is the DocuPhase user sysadmin. ADIS will not synchronize sysadmin with Active Directory. The sysadmin user code is a DocuPhase Administrator user and it is maintained from within DocuPhase, not Active Directory.
Licensing

The ADIS Service requires a license to operate. The licenses are assigned by full machine names and are auto-allocated upon running the ADIS Service for the first time. Consequently, the licensing for all DocuPhase products is handled by the License Manager and Web Service. An DocuPhase License Administrator will need to install the license prior to setting up ADIS.

Note: Please see the License Manager and Service administration guide for further information.

Enabling Single Sign On

In order to use Single Sign On in conjunction with ADIS, follow the procedure below.

- Launch DocuPhase.
- Navigate to Administration > System Configuration > System Options.
- Select the Scroll menu and select Edit SingleSignOn.
• Change False to **True**.

• Select **Update**.

Additionally, after you have enabled Single Sign On within DocuPhase, you will need to complete the following steps within Internet Explorer.

Navigate to Internet Explorer.

Select **Tools>Internet Options**.

![Internet Options dialog](image)

*Note: The Internet Options dialog displays.*

Select **Security>Trusted Sites**.

![Trusted Sites dialog](image)

Select Custom Level.

![Custom Level dialog](image)

*Note: The Security Settings Trusted Sites Zone dialog displays.*
Select the Scroll bar and navigate to **User Authentication**.

Select the radio option for **Automatic logon with current user name and password**.

Select **OK**.
Select **OK**.

Additionally, after you have enabled Single Sign on within DocuPhase, you will need to complete the following steps within IIS.

Navigate to **Start>All Programs**.

Select **Administrative Tools>Internet Information Services (IIS) Manager**.

*Note: The Internet Information Services (IIS) Manager dialog displays.*
Expand the **Server** Folder.

Select Web Sites>Default WebSite.

Right click DocuPhase.
Select Properties.

Navigate to Directory Security.

Navigate to **Authentication** and Access Control.

Select **Edit**.

*Note: The Authentication Methods dialog displays.*
Remove the Checkmark next to Enable Anonymous Access.

Ensure Integrated Windows Authentication is checked.

Select OK.
Select **Apply**.
Select **OK**.

Reset **IIS**.
ADIS Manager Environment

Starting ADIS Manager

To launch ADIS Manager, follow these steps:

- Select the **ADIS Manager Shortcut Icon** on your desktop.

**Note:** Additionally, you may select:

Start>All Programs>iDatix>ADIS Manager

to launch this program.
At the Login dialog window, enter your **User Name and Password**.

Select **Login**, unless the **Server** needs to be selected click Server, then click the **Manage** link and define your server name or its URL.

*Note: The Alias Manager dialog displays, below.*
Select **Load**.

Note: The **Server** is where the DocuPhase user and groups that will be synchronized with Active Directory resides.

Select **OK**.

**Note:** The Login to ADIS Manager dialog displays.
Select **Login**.

Upon successful login, the ADIS Manager verifies that the user has permission within DocuPhase to Add, Delete and Update DocuPhase Users, Groups and Group memberships, then displays the ADIS Manager dialog with tabs for: Login and Org Units & Groups.

Note: If the login is unsuccessful, an error message will display. Remember that Passwords are case sensitive.

Upon successful login, the ADIS Manager verifies that the user has permission within DocuPhase to Add, Delete and Update DocuPhase Users, Groups and Group memberships, then displays the ADIS Manager dialog with tabs for: Login and Org Units & Groups.
If the User does not have permission, the following error message will display and the login will fail.