



## INTEGRATION WITH ACTIVE DIRECTORY

All DocuClass basic security entities and their relationships can be defined and maintained using the DocuClass System and configuration component. However, in organizations where Active Directory is used, the DocuClass Administrator may choose to integrate the DocuClass Security scheme with the AD policies already in place. This way he/she can minimize not only the initial setup, but also the day-to-day administrative operations.

It is essential to understand that integration with AD does not replace the DocuClass Security scheme. The DocuClass users, usergroups, security policies, security keywords, and workflow roles will still be used, even if integration with AD is in place. The AD integration will simply help the Administrator to automate the task to add or delete users, as well as to define and maintain the relationships between users, usergroups, roles, and security groups.

### Synchronize DocuClass and Active Directory Users

All AD users may be automatically imported as DocuClass users. These users will initially be considered "inactive" and will become "active" as soon as mapping of their AD Group with a DocuClass Usergroup occurs.

In general, DocuClass supports two different kind of users:

a. DocuClass users. These are users defined explicitly from the Administrator using the DocuClass system and security component. The Administrator can delete a user or change user attributes (usergroups, security groups, etc.)

b. AD DocuClass users. These are users automatically imported from the Active Directory. The Administrator cannot delete a user of this type (since he/she will be deleted automatically as soon as this user is deleted from the Active Directory), he cannot change user attributes (usergroups, security groups, etc.) automatically assigned to this user using the AD to DocuClass security mappings, but he can add additional properties to this user.

When the Administrator disables any user account in Active Directory, this user will become also inactive in the DocuClass system.

### Synchronize DocuClass Usergroups and Active Directory Groups

The Administrator may declare mapping rules and define that all members of a particular AD Group should become members of a particular DocuClass usergroup. This way the DocuClass system will automatically assign a member of this AD Group to specified usergroup and will maintain this relationship as long as this mapping rule is active. That means that when the administrator removes this rule, the system automatically will remove the members of the AD Group from the DocuClass usergroup they were assigned to.

The current version of DocuClass supports the assignment of one user to several usergroups, thus if a user is a member of several AD groups and a mapping rule is defined for each of these AD groups to a DocuClass usergroup, this user will be assigned to all related DocuClass usergroups. Any relationship between a AD DocuClass user and a DocuClass usergroup made as a result of the synchronization rules cannot be deleted by the DocuClass Administrator. This relationship will be deleted automatically as soon as the synchronization rule is changed or removed, or if the user is deleted from the particular AD group. As already mentioned, the administrator can add more DocuClass usergroups to any DocuClass user imported from the AD.

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### Synchronize DocuClass Security Groups and Active Directory Groups

The Administrator may set up mapping rules and define that all members of a particular AD group should become members of a particular DocuClass security group.

This way, the DocuClass system will automatically assign all members of this AD group to the specified security group and will maintain this relationship for as long as this mapping rule is active. That means that when the Administrator removes this rule, the system automatically will remove the members of the AD group from the DocuClass security group they were assigned to. Please keep in mind that each DocuClass user may belong only to one DocuClass Security group. If a user belongs to several AD groups and a synchronization rule to a security group is defined for every AD group, only the first rule will be used.

### Synchronize DocuClass Workflow Roles and Active Directory Groups

The Administrator may set up mapping rules and define that all members of a particular AD group should become members of a particular DocuClass Workflow Role. This way the DocuClass

System will automatically assign all members of this AD group to the specified role and will maintain this relationship for as long as this mapping rule is active. That means that when the Administrator removes this rule, the system automatically removes the members of the AD group from the DocuClass role they were assigned to. The current version of DocuClass supports the assignment of one user to several workflow roles, thus if a user is a member of several AD groups and a mapping rule is defined for every one of these AD groups to a DocuClass workflow role, this user will be assigned to all related DocuClass roles. Any relationship from any AD DocuClass user to a DocuClass role, made as a result of the synchronization rules, cannot be deleted by the Administrator. This relationship will be deleted automatically as soon as the synchronization rule is changed or removed, or if the user is deleted from that particular AD group. Besides that, the Administrator can add more DocuClass roles to any DocuClass user imported from the AD.



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