Doma 6
Application administrator manual
User Management

A new era in document management.

Doma 6

Application administrator manual

User Management

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Contents

1 User Management

1.1 Introduction

Doma provides a centralised user management for both DocRoom and Routing.

Authentication
Authentication of the users is integrated with Windows Active Directory or LDAP. The network users can be synchronised by using the Doma Admin module. Once synchronised, users are automatically recognized and will be logged in automatically when starting the Doma WebInterface. When the network user is not recognized, the Doma logon screen appears.

It is also possible to do an authentication based upon database users. Database users are created and managed in the application itself. Application users always have to do a manual login when starting the Doma WebInterface.

User management tools
90% of the user management can be done in the Doma WebInterface. Only the synchronisation of network users has to be done by using the Doma admin module.

Users, groups and roles
Doma has 2 groups of users: synchronised users and database users. Synchronised users are the users that are copied from the network, database users are users that are created and managed in the Doma application itself.
Next to the *users*, Doma also provides *groups* and *roles*.
Groups are the synchronised user groups from the network. Roles are the groups that are defined and managed in the Doma system itself.

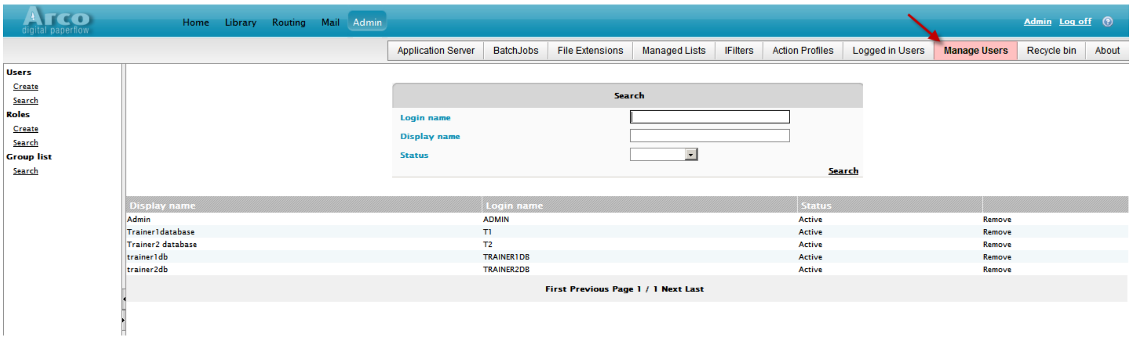
1.2 User management in the Doma WebInterface

1.2.1 Introduction

The *Arco Userbrowser* is accessible for the application administrators. It allows administrators to manage users, roles and groups on application level.

The *Arco Userbrowser* is integrated in the Web Interface, so it is not necessary to do the user management by using a client tool on the server. Users who prefer to do the management by using a client tool, can use the Doma admin module. (*See chapter* ***User Management***)

The *Arco Userbrowser* can be found in the menu of the *Admin* part of the Doma WebInterface: click on the button ***Manage Users***.



1.2.2 Users

In this list both synchronised users and database users are shown.

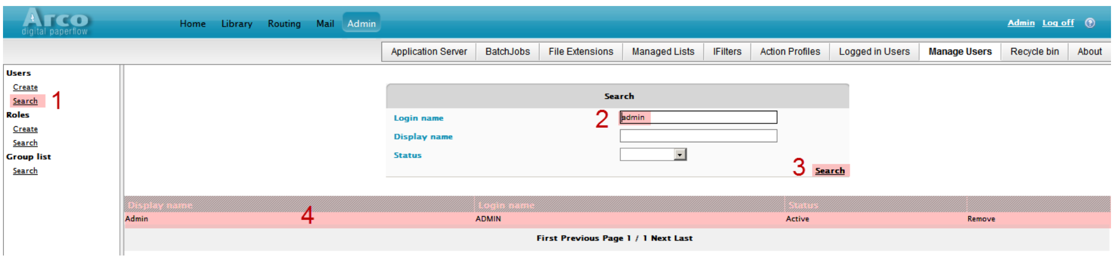
1.2.2.1 Search users

Above the user list, a search screen is shown. You can search users on their login name, display name or status.

To search:

1. Click on the option ***Users/search*** in the overview at the left.
2. Enter your search criteria in the search fields.
3. Click on the option **Search**.

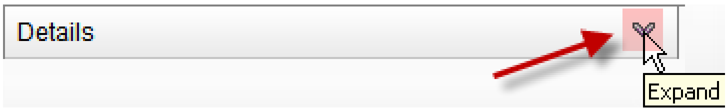
4. The result appears below the search fields.



1.2.2.2 Create users

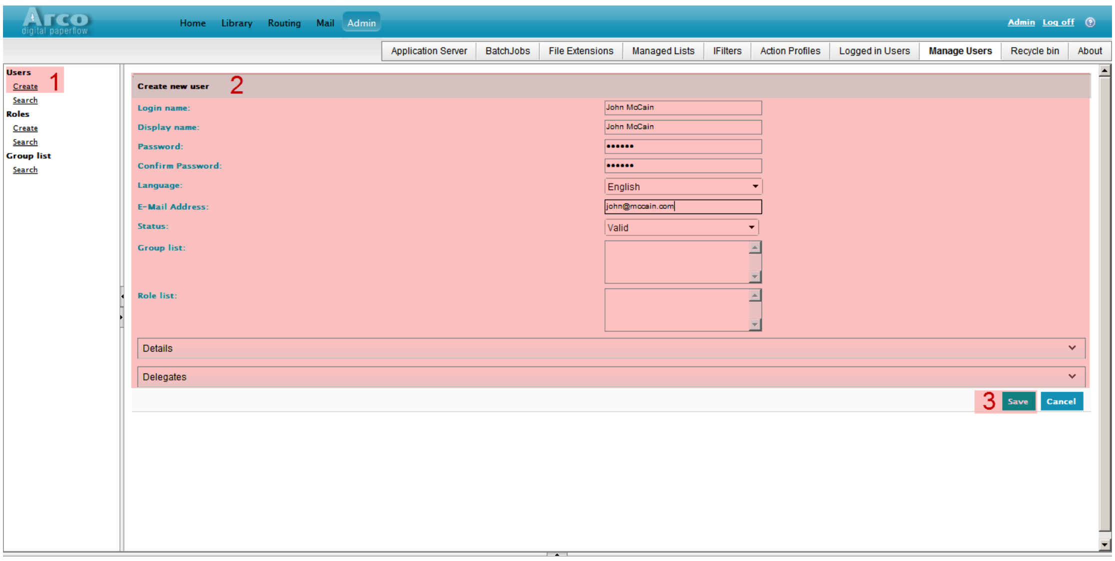
To create a new user:

1. Click on the option ***Users/Create*** in the overview at the left.
2. Enter the data of the user.
    - At least add a login name, display name and password.
    - E-Mail address is necessary to send system E-mails to the user.
    - Group list and role list indicate to which groups and roles the user belongs. Once saved, you can add the user to existing roles from this detail.
    - Below these data, you can see the items ***Details***, ***Preferences*** and ***Delegates***. These items also contain user information.
      Click on the icon at the right to expand the items:



    - The ***Details*** item contains fields like first name, last name etc. These data can be used in other DocRoom and Routing functionalities, e.g. when using automatic creation of a letter.
    - The ***Preferences*** item contains the user preferences.
    - The ***Delegates*** item gives an overview of all delegations to and from this user. From this overview you can also manage the delegations from this user.

3. Click on the option **Save**.

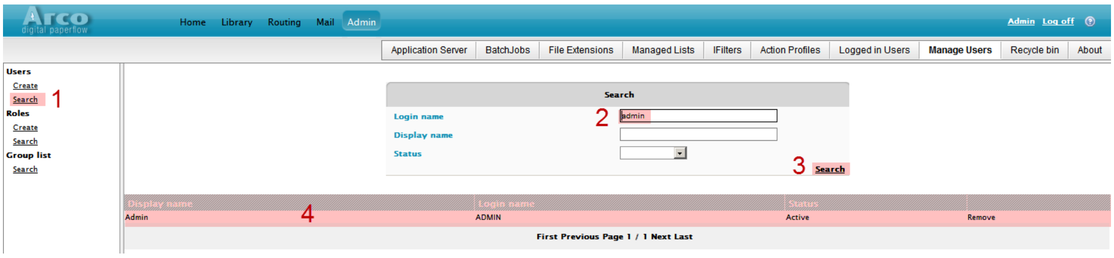


1.2.2.3 Edit users

To edit a user:

1. Click on the option ***Users/search*** in the overview at the left.
2. Enter your search criteria in the search fields
3. Click on the option **Search**.

4. The result appears below the search fields. Double-click on the user you want to edit.



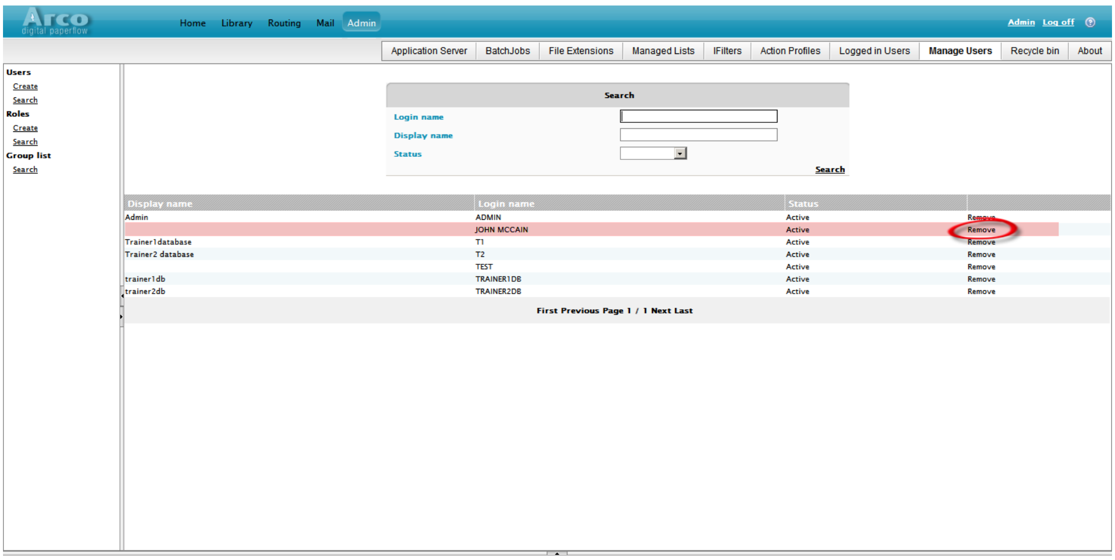
5. The user details appear. Make your changes and click on the option **Save**.

1.2.2.4 Delete users

Only database users can be deleted.
Synchronized users can only be managed on network level.

To delete a user:

1. Click on the option ***Users/search*** in the overview at the left.
2. The user list appears. If necessary, use the search function to find the user in the list.
3. Click on the option **Remove** next to the user name to delete the user.
4. The message *Are you sure you want to delete user [user name]?* appears. Confirm to delete.



1.2.3 Groups

This list contains all user groups that were synchronized from the network.

1.2.3.1 Search groups

Above the group list, a search screen is shown. You can search group on their name and on their description.

To search:

1. Click on the option ***Group list/search*** in the overview at the left.
2. Enter your search criteria in the search fields.
3. Click on the option **Search**.
4. The result appears below the search fields.

1.2.3.2 Create groups

Since groups are always synchronized network groups, they cannot be created in the system. Contact your network administrator.

1.2.3.3 Edit groups

Since groups are always synchronized network groups, they cannot be edited in the system. Contact your network administrator.

1.2.3.4 Delete groups

Since groups are always synchronized network groups, they cannot be deleted in the system. Contact your network administrator.

1.2.4 Roles

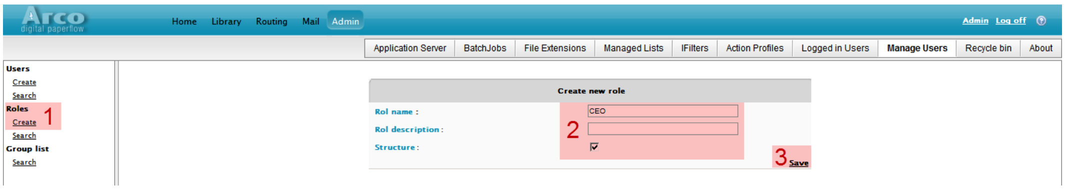
Roles are the groups that are defined and managed in the Doma system itself. Roles are used as groups that can be managed in the Doma system for DocRoom, but are also used as Routing. In Routing they are often linked to the treatment of a specific step of a procedure.

1.2.4.1 Search roles

1.2.4.2 Create roles

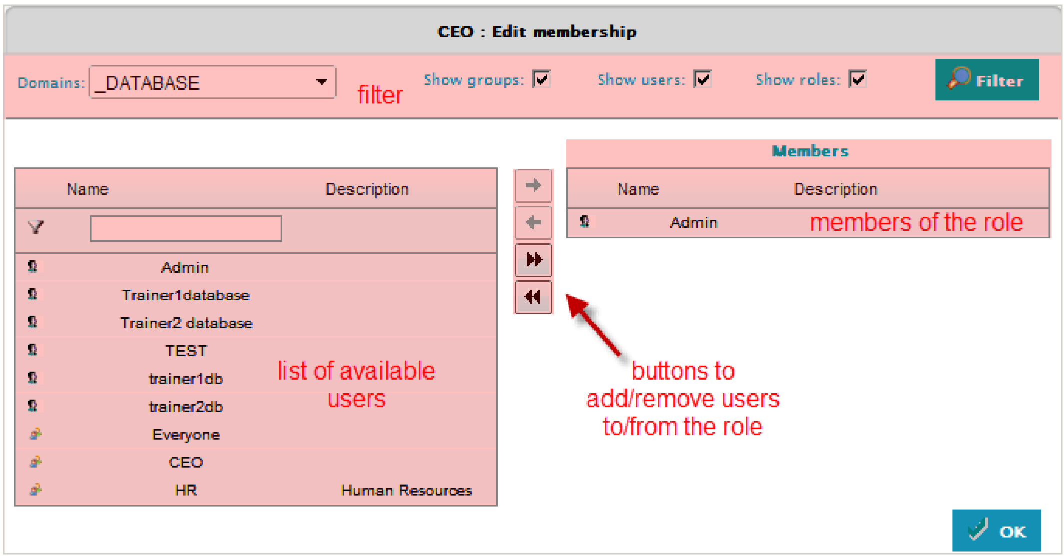
To create a new user:

1. Click on the option ***Roles/Create*** in the overview at the left.
2. Enter the data of the role:
    - Role name and role description.
    - If the role is used for Routing, you can also check the option Structure, so that a structured role is created. (*See below*)
3. Click on the option **Save**.



4. The message ***Saved Successfully*** appears, together with the option ***Edit membership***. Click here to define which users make part of the role.

5. The ***Edit membership*** window of the role appears:
   - The filter above is active on the list of available users.
   - Above the list of available users, a filter on user names is available.
   - Select the users that have to be added to the role and transfer them to the members list by using the buttons in between.
   - Click on the **OK** option below to save and return to the role description.



1.2.4.3 Edit roles

To edit a role:

1. Click on the option ***Roles/search*** in the overview at the left.
2. The role list appears. If necessary, use the search options above the list to find the role you want to edit.
3. In the list, click on the role you want to edit.

4. The Update role screen appears. Here you can modify the fields *Role name*, *role description* and *Structure*. Or click on the item *Edit membership* to add or remove members of the role.

1.2.4.3.1 Add a user to a role

- Open the **Update role** screen.
- Click on the option *Edit membership*.
- Select the user you want to add in the left list (single mouse click). If you want to select several users, press the [Ctrl]-key on your keyboard.
- Click on the transfer button  between the lists.
- The user now appears in the members list of the role.
- Click on the **OK** button.

1.2.4.3.2 Remove a user from a role

- Open the **Update role** screen.
- Click on the option *Edit membership*.
- Select the user you want to remove from the members list (single mouse click). If you want to select several users, press the [Ctrl]-key on your keyboard.
- Click on the transfer button  between the lists.
- The user now disappears from the members list of the role.
- Click on the **OK** button.

1.2.4.4 Delete roles

To delete a role:

1. Click on the option ***Roles/search*** in the overview at the left.
2. The role list appears. If necessary, use the search function to find the role in the list.
3. Click on the option **Remove** next to the role to delete the role.
4. The message *Are you sure you want to delete role [role number]?* appears. Confirm to delete.

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1.2.4.5 Structured roles

Structured roles are roles that have a hierarchical relationship. When used in Arco Routing workflow, you can refer to the *parent role* of a role, i.e. the role(s) that is (are) situated one level higher than the current role, or to the *child role*, i.e. the role(s) that is (are) situated one level below the current role.

To make a role a structured role, check the checkbox ***Structure***, then save.

After save, the next fields appear:

- **Parent Structure Role**: shows all parent roles of the selected role and allows you to select a parent role for the selected role. Select a role out of the dropdown list and save. Click on the pencil icon to create a new role.
- **Child structure role**: only in read-only, shows which roles are defined as child roles of the selected role.

Save again after you made your changes.

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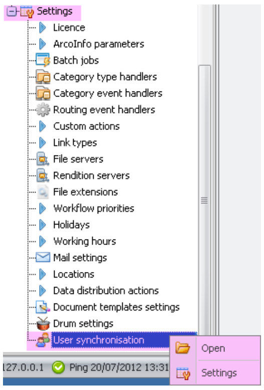
1.3 User Management in the Doma admin module

1.3.1 Introduction

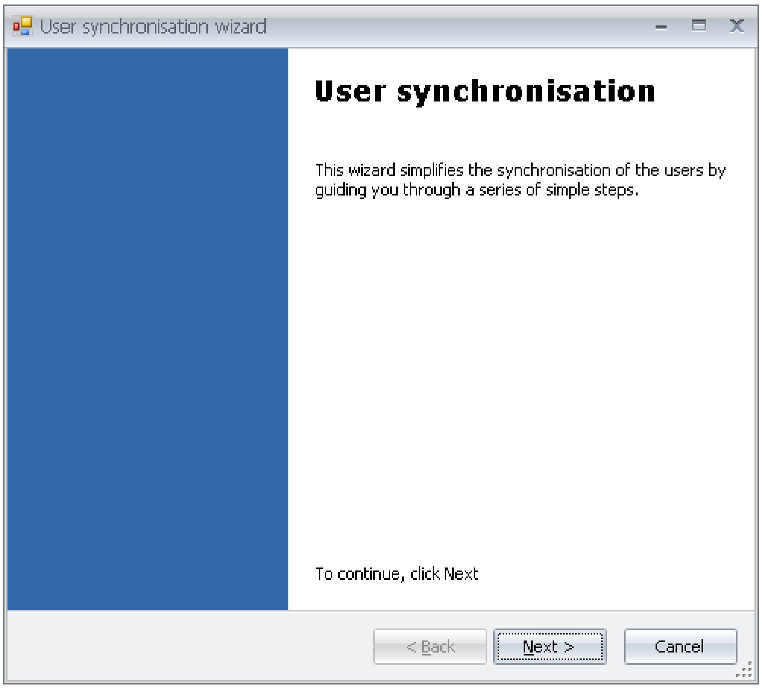
The Doma admin module has to be used to do a user synchronization with the network.
All other user management is done via the Doma WebInterface.

1.3.2 Manual user synchronization

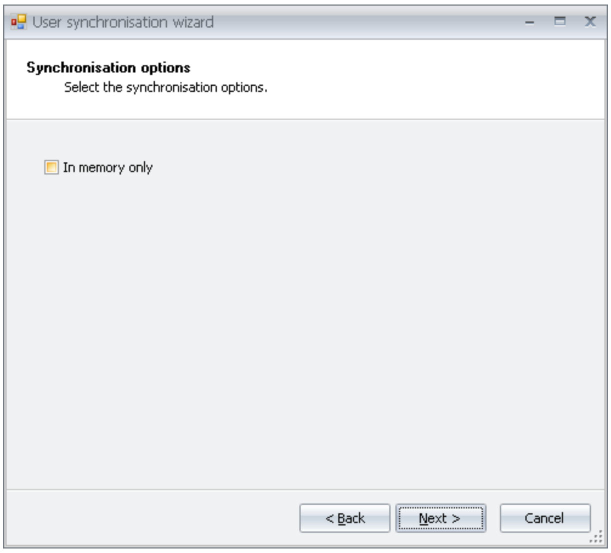
Select the item *User synchronization* in the part *Settings* of the navigation tree of the Doma admin module. Double-click on it to start the *user synchronization wizard*.
If you click on the right mouse button, a menu appears. Here you can choose between *Open* or *Settings*. Click *Open* to start the *user synchronization wizard*.



The first screen of the user synchronization wizard will appear:

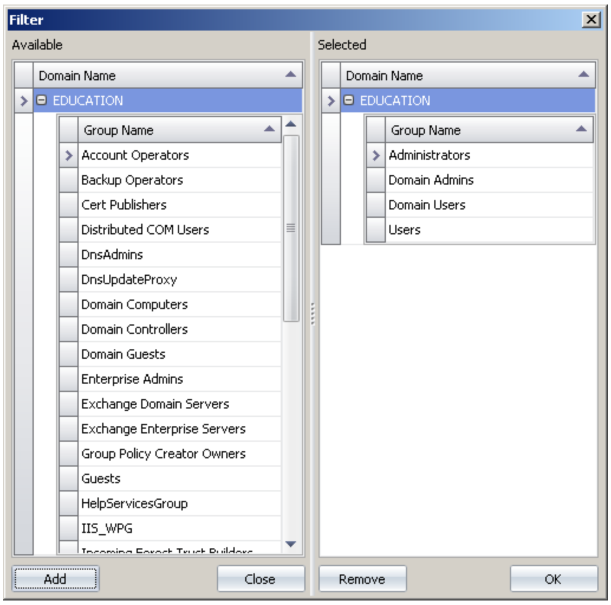


Click on the **N** button to continue; the next screen appears:



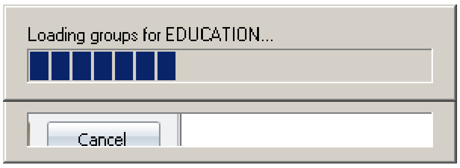
Window item	Description
In memory only	☑ When selected, the synchronization is done in memory only, as a kind of a test. ☐ If not selected, the synchronization is really executed.
Back button	Return to the previous step.
Next button	Continue.
Cancel button	Cancel the synchronization.

Click on the **Next** button to continue; if the parameter ***SyncEnableFilter=1***, then the next filter appears; if the value of the parameter ***SyncEnableFilter=0***, this window is skipped.

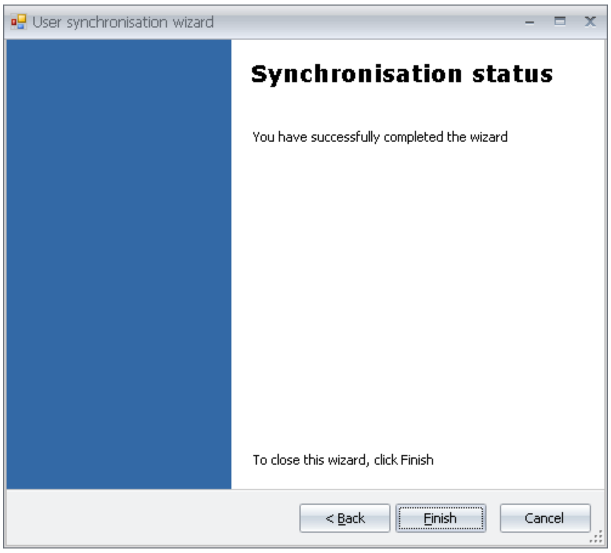


By using this filter you can specify which users and groups have to be synchronized.
Select the users and groups in the left part of the screen and then click on the button Add to add then to the selected items in the right part of the screen.
Click on **OK** to close the window and continue.

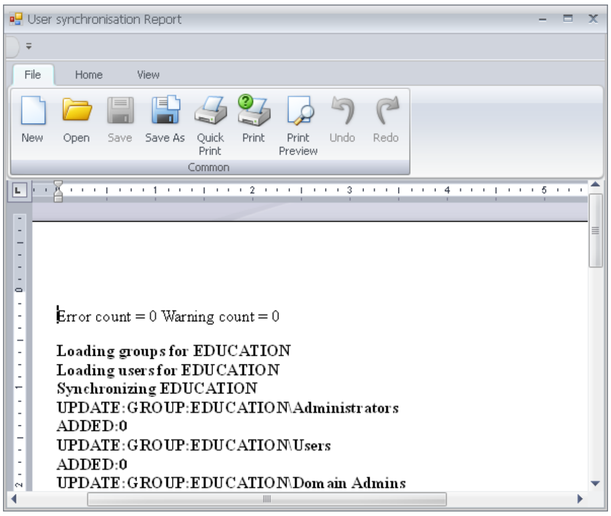
The synchronization is started. A progress screen is visualized:



A new window mentions that the synchronization has been completed:



Click on the Finish button to close the window. The user synchronization report appears:



1.3.3 Automatic user synchronization

The batch job ***Default User Sync*** is a pre-defined batch job that can be activated to do an automated synchronization.
It is designed to run every day at 20.00 hours.

Activate the batch job in the ***Batchjobs*** item of the ***Admin*** section of the Doma WebInterface.

1.3.4 User synchronization settings

Select the item *User synchronization* in the part *Settings* of the navigation tree of the Doma admin module. Click on the right mouse button, a menu appears. Select *Settings*.
The user synchronization settings now appear.

These settings are kept in the Arco Info table of the database.

The next parameters are shown:

Parameter	Value / Description
SyncAddOnly	**0**: Groups and users that have been removed from the network will also be removed during synchronization. **1**: Groups and users that have been removed from the network are not removed from Doma. Only new users/groups are added.
SyncAssembly	**Arco.Doma.Synchronizers**: reference to the assembly used for synchronization.
SyncClass	**Arco.Doma.Synchronizers.DefaultActiveDirectorySynchronizer:** reference to the class used for synchronization.
SyncEnableFilter	**0**: No filter is used; complete user list is synchronized. **1**: The synchronization wizard shows a filter, allowing the administrator to filter certain parts of the domain so that only the filtered parts will be synchronized.
SyncMethod	*Obsolete; replaced by SyncClass.*
SyncUpdateFields	**0**: copy field values only at insert (like email address). **1**: copy field values at insert and updates.
SyncUsersInSelectedGroupsOnly	**0**: All users are synchronized. **1**: Only users of the groups selected in the filter will be synchronized.