



How To – Active Directory

Checkbox Survey Active Directory Guide	
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1 Introduction

To support Enterprise environments with large Active Directory user stores, Checkbox allows certain integrations with Active Directory. Integrating Active Directory will allow you to not have to constantly update user information within Checkbox and AD, and will simplify the login process for users.

Once the integration is complete, all AD users will have access to Checkbox. You can configure default roles for all AD users as a “catch all” rule, or specify roles for specific groups in AD.

Active Directory integration is only supported with a Checkbox Enterprise license. Attempting to configure Checkbox to integrate with Active Directory without an enterprise license will disable your installation.

2 Before you Begin

Please review all instructions prior to starting the integration process. If you have any questions about the integration or the process, please contact Checkbox Support. You can access the online helpdesk through the following URL:

➤ <http://www.checkbox.com/login>

This guide assumes that you already have an active and stable Checkbox installation. You cannot configure Active Directory integration prior to installing the application.

3 Instructions

3.1 Configure Active Directory Configuration String

In the <connectionStrings /> section of the web.config, locate the Active Directory connection string. Change the connection string attribute so that it looks like the following (Replace the values for [DOMAIN CONTROLLER], [DOMAIN], and [TLD] that are appropriate for your environment):

```
<!-- Connection strings for AD authentication, if enabled. -->
<!-- Each AD membership provider may have its own connection string. -->
<add name="ADConnectionString1" connectionString="LDAP://[DOMAIN CONTROLLER]/DC=[DOMAIN],DC=[TLD]" />
```

3.2 Change the Default Membership Provider

Locate the <membership /> section of the web.config around line 248 of the web.config and change the default provider from "CheckboxMembershipProvider" to "ChainingMembershipProvider".

```
<!-- Chaining Membership provider that supports querying multiple other providers to
      authenticate users. This allows authentication against multiple data stores (including
      Active Directory). -->
<membership defaultProvider="ChainingMembershipProvider" userIsOnlineTimeWindow="20">
```

3.3 Enable Chaining Membership Provider

Near line 254 of the web.config, remove the comment delimiters around the provider definition. Be sure to remove the end comment (-->) as well. The provider definition should look like:

```
<!-- Chaining Membership provider. Used when multiple membership providers are active at the same time. -->
<add
  name="ChainingMembershipProvider"
  type="Checkbox.Web.Providers.ChainingMembershipProvider,Checkbox.Web.Providers"
  chainedProviders="CheckboxMembershipProvider,ActiveDirectoryMembershipProvider1"
  checkboxMembershipProvider="CheckboxMembershipProvider"
  applicationName="/"
/>
```

3.4 Enable Active Directory Membership Provider

Near line 265 of the web.config, remove the comment delimiters around the provider definition. The provider definition should look like:

```
<!-- Active Directory Membership -->
<!-- See MSDN documentation for additional configuration options. -->
<add
  name="ActiveDirectoryMembershipProvider1"
  type="System.Web.Security.ActiveDirectoryMembershipProvider, System.Web, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a"
  connectionStringName="ADConnectionString1"
  connectionProtection="None"
  connectionUsername="[AD USER NAME]"
  connectionPassword="[PASSWORD]"
  attributeMapUsername="[AD Attribute to Map to User Name, Usually should be SAMAccountName]"
  enableSearchMethods="true"
/>
```

3.5 Configure Active Directory Membership Provider

- a. Replace [AD User Name] and [Password] with credentials of an account that can access the Active Directory and list users.
- b. Configure the attributeMapUsername property. This is the name of the Active Directory user attribute that Checkbox will map to a user name. In most cases "sAMAccountName" is the appropriate value.

3.6 Optional: Change Active Directory Membership Provider Name

The application allows you to customize the name of the AD membership provider. Since this name is what will appear in the application for users to see, providing a “user friendly” name could be necessary.

In order to change the name please do a find and replace on

“ActiveDirectoryMembershipProvider1” and replace it with the name you want to utilize. Make sure that you replace all occurrences or the configuration will be invalid.

3.7 Optional: Change the Default Role Provider

The application allows you to assign roles to specific groups in active directory. This allows you to (for instance) assign the System Administrator role to all members of the “Developer” group in active directory.

To enable the Active directory role provider, find the RoleManager node in the web.config file. This will be around line 286. You should change the defaultProvider from “CheckboxRoleProvider” to “ChainingRoleProvider”. It should look like below:

```
<!-- Chaining role provider that supports querying multiple other providers to
      get user roles. This allows role queries against multiple data stores (including
      Active Directory). -->
<roleManager enabled="true" defaultProvider="ChainingRoleProvider">
```

3.8 Optional: Enable Chaining Role Provider

Near line 289 of the web.config, remove the comment delimiters around the role provider definition. Be sure to remove the end comment (--) as well. The role provider definition should look like

```
<!-- Chaining Role provider. Used when multiple role providers are active at
the same time.-->
<add name="ChainingRoleProvider"
type="Checkbox.Web.Providers.ChainingRoleProvider,Checkbox.Web.Providers"
chainedProviders="CheckboxRoleProvider,ActiveDirectoryRoleProvider1"
checkboxboxMembershipProvider="CheckboxRoleProvider"
applicationName="/" />
```

3.9 Optional: Enable Active Directory Role Provider

Near line 298 of the web.config, remove the comment delimiters around the role provider definition. The provider definition should look like:

```
<!-- Active Directory Role Provider. Supports mapping AD Groups to Checkbox
user roles through roleMappings parameter.-->
<add
name="ActiveDirectoryRoleProvider1"
type="Checkbox.Web.Providers.ActiveDirectoryRoleProvider,Checkbox.Web.Providers"
cacheAdRoles="true"
connectionUsername="[AD User Name]"
connectionPassword="[Password]"
domainDn=""
roleMappings="[Map AD Groups to Checkbox Roles, such as: Registered Users=Respondent,Administrator=System Administrator]"
applyDefaultRolesToUsersWithNoMappedRoles="true"
/>
```

3.10 Optional: Configure Active Directory Role Provider

- Replace [AD User Name] and [Password] with credentials of an account that can access the Active Directory and list users.
- Fill in the proper domainDn value
- Replace the roleMappings section with Group to Role pairs.

3.11 Test Settings

When you have completed all of the above instructions you should attempt to log into the application as an active directory user. You should be able to log into the application with just your username, and not your domain.