



DMSSYNC FOR OPEN TEXT EDOCS™

Installation and Operations Manual

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Introduction

Welcome to DMSSync!

DMSSync is a companion utility to WincTools that automatically creates eDOCS user and group information from your Windows domains or Novell NDS servers.

Like WincTools, DMSSync is written using Hummingbird 32-bit API calls to perform all functions. This means that DMSSync functions regardless of database and Network Operating System (NOS) platforms, and can even support libraries that are running on different database systems.

The WincTools ReadMe.txt file contains information on the latest features, functions and bug fixes in WincTools and companion products. It is suggested that you review the WincTools ReadMe.txt file before attempting to install, run, or upgrade an existing copy of WincTools or DMSSync.

NOTE: Disabling virus scanning software on a computer that is running DMSSync may improve performance up to four-fold, especially if the options to log everything or log SQL statements have been selected.

System Requirements

DMSSync has been tested and operates using the following minimum configurations:

- Any Windows-based personal computer that runs OpenText eDOCS DM Extensions client (32-bit or 64-bit) **Do not run Winc products on a Windows Document or SQL Database (Library) Server.**
- Open Text eDOCS 5.1.05 or later is recommended. **If possible, you should always run dmsSync with the latest patch-level for the eDOCS version you are using. dmsSync is tested with all versions of eDOPCS up to and including 16.3.**
- eDOCS DOCS_SUPERVISORS rights
- Network rights to read the Active Directory (Windows servers) or NDS (Netware servers)

Notice to Evaluation Users

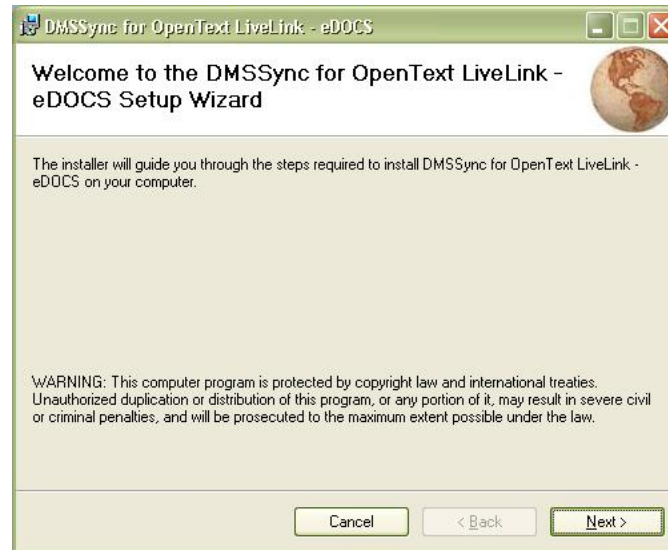
You are allowed to use DMSSync for evaluation purposes for a period of 60 days from the program date, 30 days from the date of installation, or for 15 executions, whichever comes first. Unless you register this program, DMSSync will cease to function after the expiration of the evaluation period. A maximum of 10 users or groups can be replicated per session.

DMSSync Installation

Initial Workstation Installation

To install DMSSync, follow these instructions:

1. Insert the WincTools CD into the appropriate drive of the computer.
2. Navigate to the WincTools eDOCS Version Modules directory, and locate the DMSSync directory.
3. Double-click **DMSSyncSetup.msi**. The following screen will be displayed click **Next** to continue.



4. You are now ready to install DMSSync. You may change the installation directory if desired, or simply click on the computer icon to begin installation. Note that the installation directory must be the same as the WincTools directory if you are installing both applications on the same workstation, by default C:\Program Files\WINC\.



5. Follow any on-screen prompts to complete the installation. A program group will be created automatically, and a shortcut to the application will be added to your programs folder.

Upgrading an Existing DMSSync Installation

Wertheim Global Solutions periodically releases updated versions of WincTools and its associated add-on modules. All updates are released in ZIP (compressed) format, requiring the use of a decompression program such as WinZip® to decompress the file or files.

In most instances, product updates do not require a re-installation of the product. Installation of the update, then, simply requires that the new executable (e.g., DMSSync.exe) be extracted to the original installation directory, overwriting the older version.

Updates to companion products are made available in two ways:

1. Via download from the Wertheim Global Solutions website. Visit www.WertheimGlobal.com and click on **Support**. *
2. On the WincTools CD, in the Updates directories.

* You must have a licensed copy of WincTools in order to use this service.
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Both the full installation and the update files alone are available for download from the Wertheim Global Solutions support site.

To upgrade DMSSync:

1. Exit WincTools and all companion products.
2. Open the update ZIP file using a decompression application such as WinZip.
3. Extract all of the files included in the update ZIP file to your WincSync installation directory. For a default installation, this will be C:\Program Files\Winc.

The DMSSync upgrade is then complete.

Note for Add-on Modules

Multiple copies of the WincTools add-on modules (WincArchive, WincSync, WincWall, or DMSSync) cannot execute simultaneously on a single computer. Attempting to run more than one of the add-on modules on the same computer at the same time can cause unpredictable results, particularly when different libraries are being accessed concurrently by the different modules. WincTools, and each of the runtime versions of the add-on modules, checks to make sure this is not occurring and displays an error if a conflict is identified. In order to be able to bypass (ignore) this error, you can start WincTools or any of the runtime versions using the /NOCHECK command line parameter. This option is particularly useful if you are running multiple WincTools modules in different sessions using Citrix.

Configuring a DMSSync Library

DMSSync replicates user, group, and group membership from any domain in an enterprise. Because replication is based on the network system ID of the user or group, DMSSync is able to recognize and correctly maintain re-named accounts. DMSSync also provides the ability to restrict replication to a subset of domain users or groups based on masks, such as DOCS*.

DMSSync allows synchronization from all domains that are recognized from network aliases assigned to the root group. DOCS_USERS is set as the default root group; please refer to the section on DMSSync Options, beginning on page 20, for more information.

The DMSSync setup process creates four new tables in the library to which it is installed. Although DMSSync can be configured for as many libraries as desired, it is most efficient to run DMSSync against a single master library and allow WincSync to replicate the user and group information out to all other enterprise libraries.

The DMSSync Tables

The following tables, indices, and sequences (Oracle only) are created upon initializing a library for DMSSync:

WINC_SETTINGS: stores options and settings for DMSSync and other Winc products. Note that un-initializing a library will not remove the WINC_SETTINGS table, as it may contain configuration information for other Winc products.

- o Indices: PK_WINC_SETTINGS

WINC_DMSSYNC_FLTRS: This table stores the DMSSync filters and masks used to limit a synchronization set.

- o Indices: WINC_DMSSYNC_FLTRS_PK, WINC_DMSSYNC_FLTRS_INDEX
- o Sequences: SEQWINC_DMSSYNC_FLTRS

WINC_DMSSYNC_MAPS: This table stores the information DMSSync uses for mapping network account names to Hummingbird account names.

- o Indices: WINC_DMSSYNC_MAPS_PK
- o Sequences: SEQWINC_DMSSYNC_MAPS

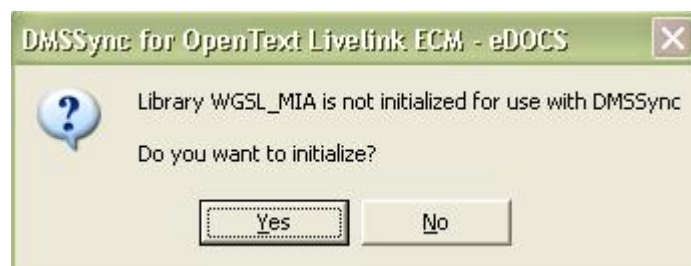
WINC_DMSSYNC_SID: This table stores the system IDs of the network accounts; this allows DMSSync to identify the correct Hummingbird account even if the domain account name is modified.

- o Indices: WINC_DMSSYNC_SID_PK

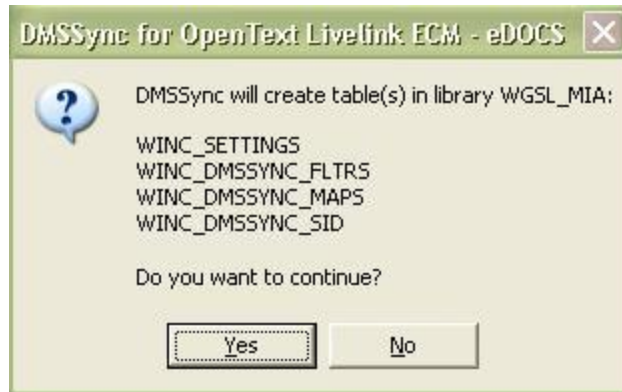
Preparing the DMSSync Library

NOTE: DMSSync must connect to the database using a login with sufficient rights to create tables, indices, and sequences. In most cases, the DOCSADM account will suffice.

The initial DMSSync configuration is performed the first time DMSSync is launched; DMSSync will ask you to confirm that you want to initialize the current library:



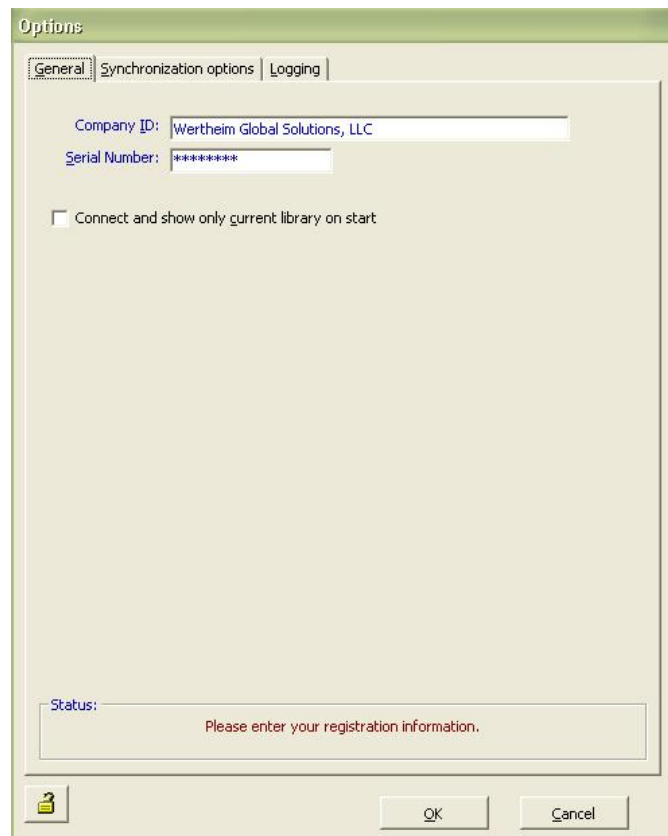
Click **Yes** to continue. If you click **No**, the application will load with errors, and you will not be able to perform any synchronization. After clicking Yes, DMSSync will again ask for confirmation:



Click **Yes** to proceed with the configuration of DMSSync on the current library; when the configuration is complete, DMSSync will launch.

Registering DMSSync

If you have not yet registered DMSSync, you will be prompted to enter your serial number when the application launches. To enter your serial number, select **Options** from the **File** menu, and click on the **General** tab. Be sure to enter the information exactly as provided; the registration is case- and punctuation-sensitive.



Removing DMSSync

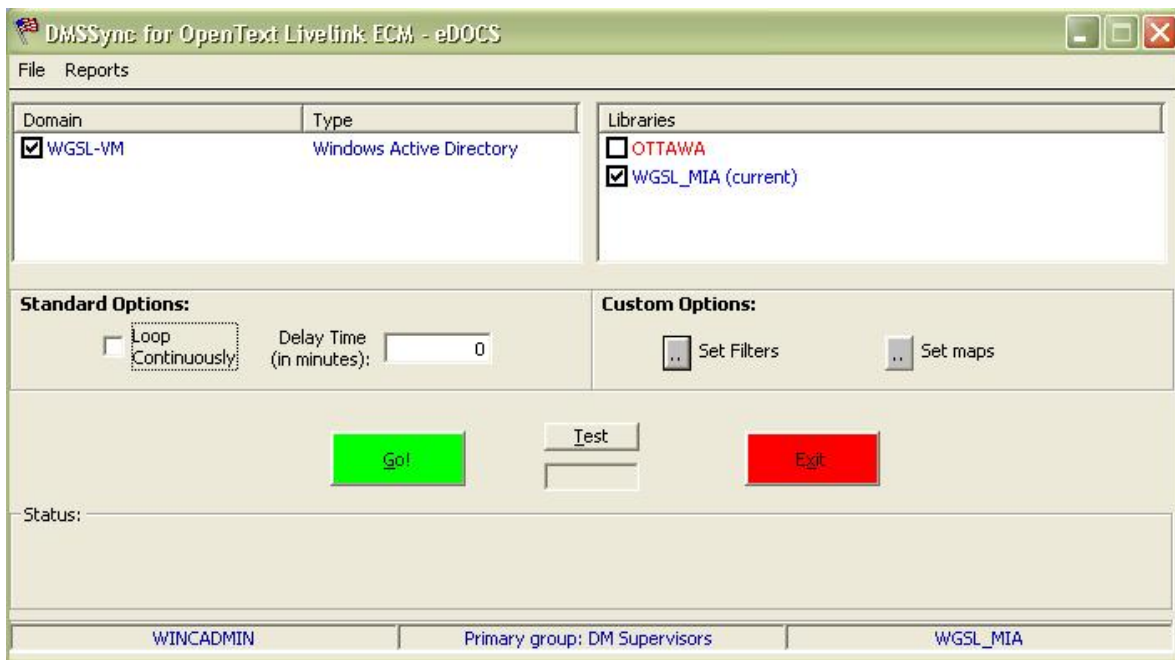
To remove DMSSync from a library, select **Uninstall** from the **File** menu. A list of libraries will appear; select all libraries from which DMSSync should be removed and click **Uninstall**.



Note that the WINC_SETTINGS table will not be removed when un-installing DMSSync.

The DMSSync Application

The main DMSSync application screen will display all domains and libraries available for synchronization. The network list is generated from all networks which can be recognized from aliases assigned in Hummingbird's Library Maintenance to the DOCS_USERS group; the libraries displayed are those defined as remote libraries to the current library. Libraries displayed in red have not yet been initialized for DMSSync and cannot be synchronized.



DMSSync Basic Options

Standard Options

Loop Continuously: Select this option to have WincSync continuously poll for new or modified data to be processed.

Delay Time: Enter the number of minutes to pause between each processing loop.

Custom Options

Set Filters: Launches the Filters configuration form. Refer to the Filters section on page 12 for more information.

Set Maps: Launches the Maps Management form. Refer to the Maps section on page 14 for more information.

The selected domains will be synchronized with the selected libraries when the **Go!** button is clicked. To further specify which users or groups are synchronized, please refer to the Advanced Options section on page 11.

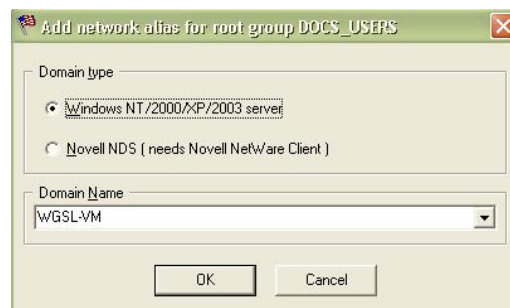
DMSSync Advanced Options

DMSSync provides many synchronization options, from designating a subset of users and groups for synchronization to specifying a default template for new users and groups. These and other options, located under the **File** menu, are detailed below.

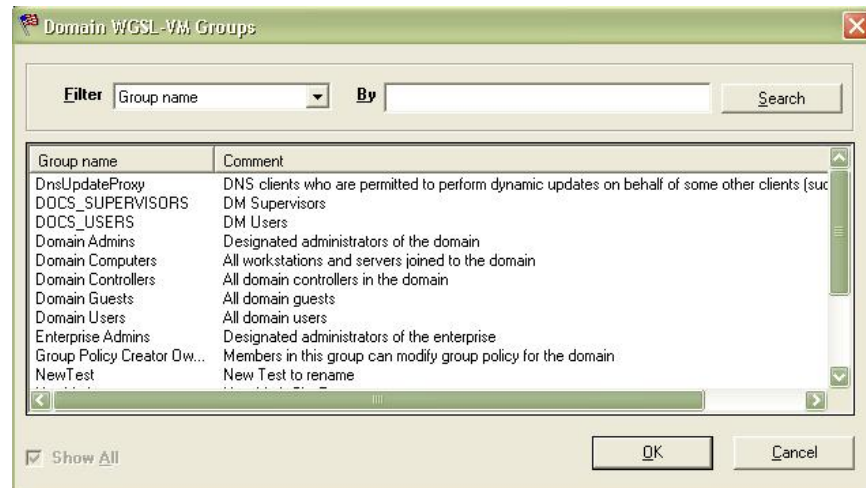
Add Network Alias

If a specific network does not appear in DMSSync for synchronization, a network alias on that network has not yet been specified for the *root group*. In many cases the *root group* is the DOCS_USERS group but it can be set to any group in the Library.

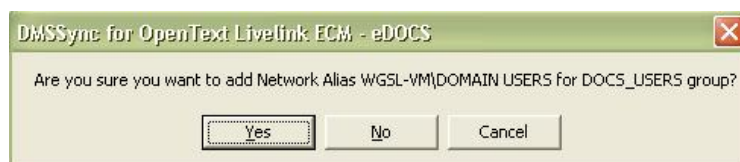
To add a network alias to the *root group*, you can use the **Add Network Alias** function in DMSSync:



Specify the appropriate type of network; all detected domains of that type will then be available in the Domain Name drop-down list. Select a domain and click **OK**; the groups from that domain will then be displayed:



Select the group to be aliased to the *root group* and click **OK**. You will be prompted to confirm your selection before DMSSync completes the alias assignment.



Toggle Domains

Toggles the status of the domain checkboxes; all checked items will be un-checked and vice-versa.

Toggle Libraries

Toggles the status of the library checkboxes; all checked items will be un-checked and vice-versa.

View Log

Displays the most recent DMSSync log file.

Purge Log

Purges the most recent DMSSync log file.

Filters

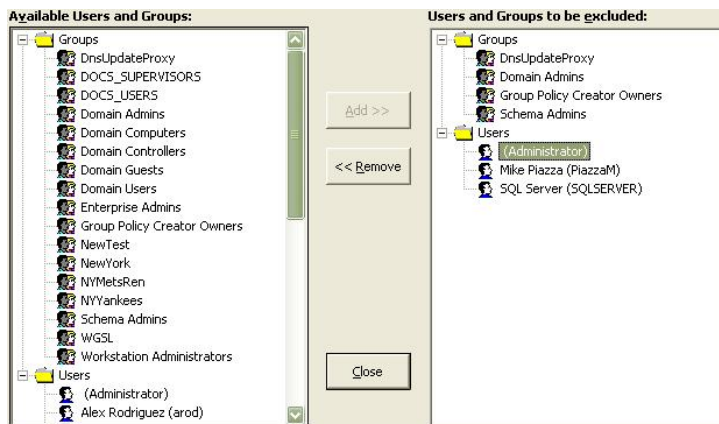
Like the Set Filters option button, this menu item displays the Filters configuration form. Using this form, you can set filters for specific libraries and domains:

The screenshot shows a window titled "Filters for library WGS_L_MIA". At the top, there are two dropdown menus: "Library:" (set to "WGS_L_MIA") and "Domain:" (set to "WGS_L-VM"). Below these are two main panels. The left panel, titled "Available Users and Groups:", contains a tree view with "Groups" and "Users" folders, each with a plus icon. The right panel, titled "Users and Groups to be excluded:", contains a similar tree view with "Groups" and "Users" folders. Between the panels are two buttons: "Add >>" and "<< Remove". At the bottom center is a "Close" button. At the bottom of the dialog are two sections: "Group Patterns to" with a dropdown set to "Include" and a text area below it; and "User Patterns to" with a dropdown set to "Include" and a text area below it.

Select the appropriate library in the left-hand Library dropdown, and pick the appropriate domain from the right-hand Domain dropdown. Note that the filters will only apply to this combination of library and domain; any filters which are to act on multiple libraries or domains must be created individually for each library and each domain.

After selecting a domain, DMSSync will connect to the specified domain and retrieve all users and groups to the left-hand **Available Users and Groups** display. Note that this process may take a long time if you have a large domain or slow network connectivity. Any current filters for the selected domain on the current library will be displayed on the right, in the **Users and Groups to be Excluded** column.

Use the **Add** and **Remove** buttons to specify individual users or groups for exclusion; any users or groups added to the right-hand column will not be synchronized to the library when DMSSync runs.

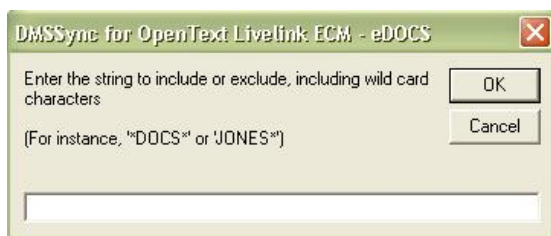


Pattern Filters allow you to specify multiple users or groups for synchronization. Each pattern filter group can be set to one of two modes: **Include** or **Exclude**. The selected mode applies to all patterns specified in the list; you cannot create an Include pattern for one group mask and an Exclude pattern for another group mask. You can, however, create Include masks for groups but specify Exclude masks for users, or vice versa.

An Exclude filter (such as **_TMP*) will exclude any matching user or group from synchronization even if the user or the group members are included in the *root group* or any other synchronized group.

An Include filter (such as *DMS**) will include *only* the specified users or groups in the synchronization process and, for groups, only those members who are also members of the *root group*. All users or groups not specified by an include filter will be excluded.

To create a Pattern Filter, first specify Include or Exclude and then click on the ellipses button above the group or user pattern listing. Select **Add** from the pop-up menu, and type the desired pattern mask into the dialog box:



Allowed wildcards are the asterisk (*) and the question mark (?). Use the asterisk to specify an unknown number of characters; use a question mark to specify single unknown character. For example, *DMS_** would process all groups starting with the character string *DMS_*, while *DMS_?* would process only those groups where a single character followed the underscore (e.g., *DMS_1*, *DMS_2*, *DMS_A*, etc.).

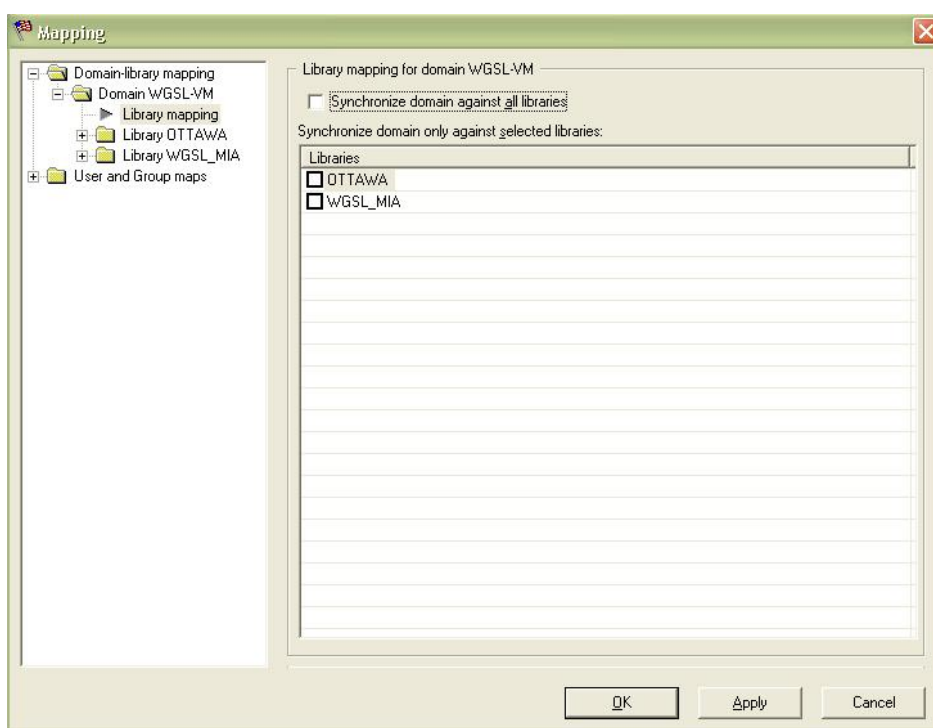
Click **OK** to save the mask. You can edit or delete saved pattern masks by clicking again on the ellipses button above the group or user pattern listing and selecting the appropriate menu item.



Manage Maps: Maps

Like the Set Maps button, this menu item (off the **Maps** menu) launches the Maps Management form. DMSSync maps designate the default behaviors for DMSSync under various circumstances, detailed below.

Domain – Library Maps

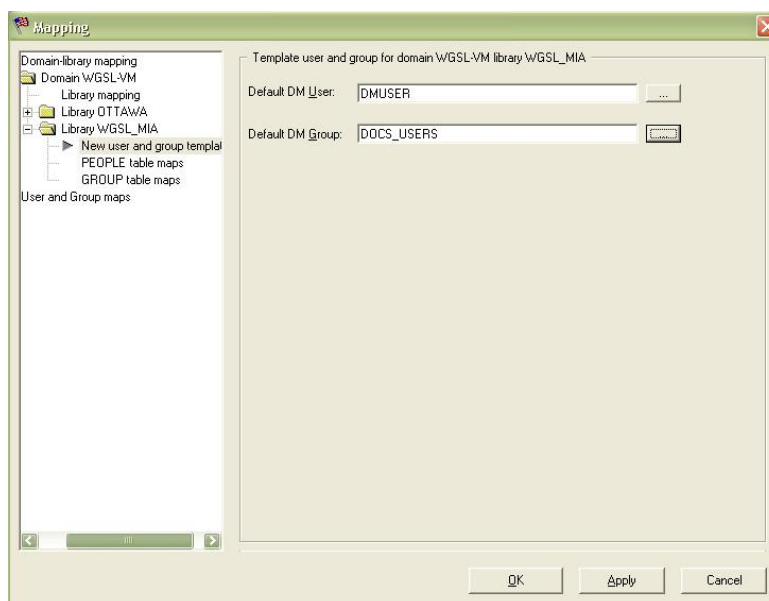


For each domain, you can specify which libraries should receive the domain's user and group information. Only those libraries configured for DMSSync will be available for selection; if all libraries should be synchronized with the selected domain, place a checkmark next to the option labeled **Synchronize domain against all libraries**.

NOTE: If WincSync is used in your enterprise to synchronize all data from a master library, DMSSync should only be run against that master library.

Domain – Library – New User & Group Templates

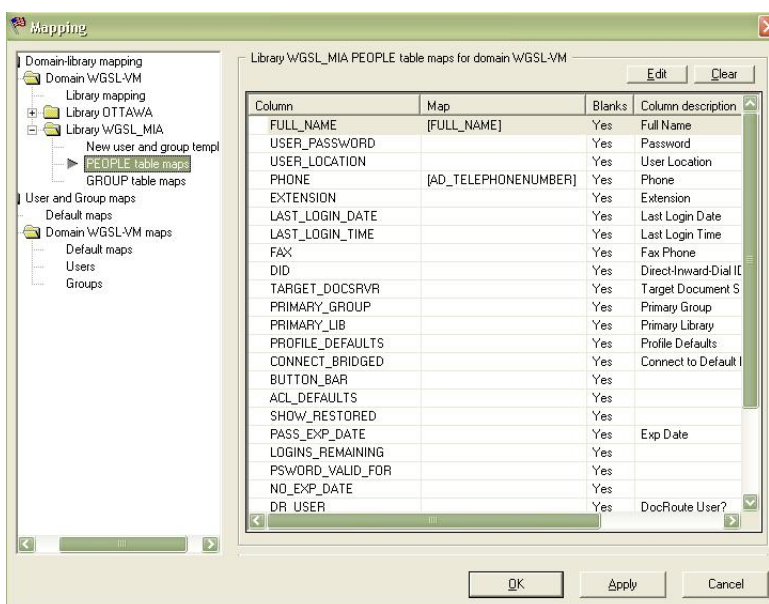
For each domain, you can specify a default template to be used *in each library* when creating new users and groups.



Because it is possible that the default user from one library does not exist in another library, it is required that default users be specified for each library that is to be synchronized with DMSSync.

Domain – Library – PEOPLE and GROUPS table Maps

For each domain, you can specify fields from the Network or DMSSync specific values to map to User's value fields in the PEOPLE or GROUPS table *in each library* when creating new users or groups.

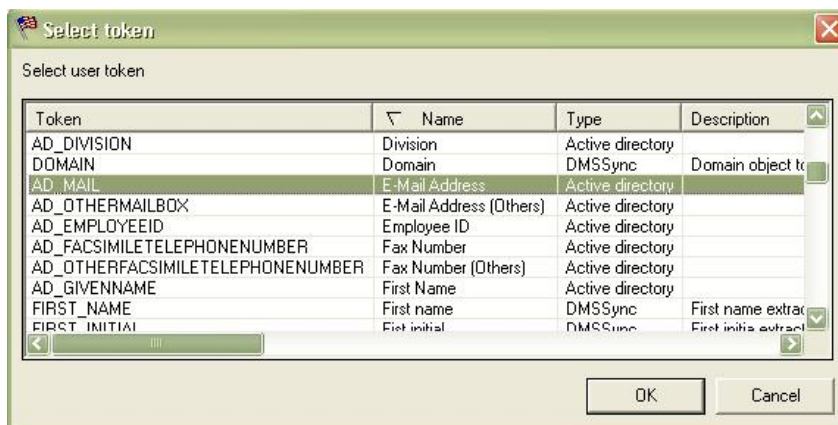


To create a new Map, select the desired Column and click the **Edit** button, the Add PEOPLE or GROUPS column map dialog box will show. If you want to make the field unique select the

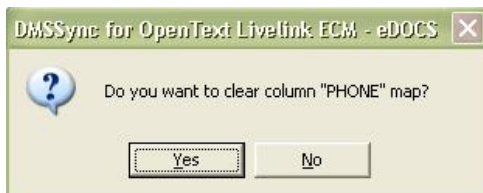
Unique key checkbox, and to prevent from having blank values select the **Do not allow blanks** option. Exercise caution when using these options with GROUPS maps.



To select a Map, click on the ellipsis and choose from the list of available tokens, both from the Network and DMSSync.



To delete a Map, select it from the list and click the **Clear** button, a dialog box will prompt you to confirm the removal of the Map.



User and Group Maps – Default

In most environments, network and DM accounts are created with identical IDs. However, DMSSync allows DM accounts to be generated based on any combination of several different fields from the network or library. The network user or group property NETWORK_ALIAS is used by default, but DMSSync can also be configured to use any combination of items:

Network User:

- Account Control Flags
- Comment
- Disabled
- Domain
- First Initial
- First Name
- Full Name
- Last Initial
- Last Name
- Long Network Alias

Network User (con't)

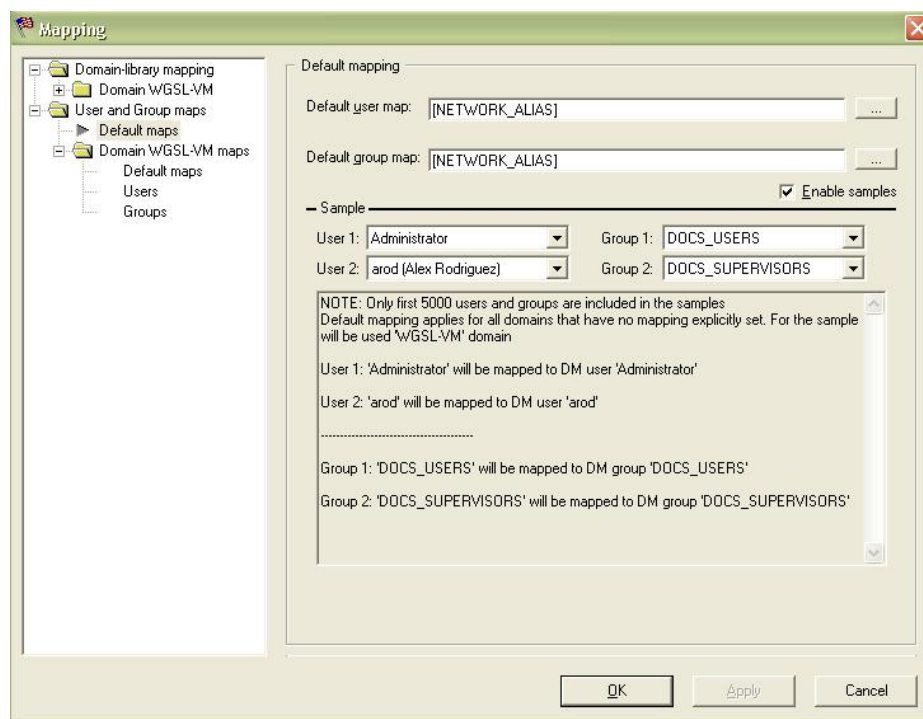
- Middle Initial
- Middle Name
- Network Alias
- Primary Group ID
- SID

Synchronizing Library

- Name

Synchronizing Domain

- Domain Controller
- Name



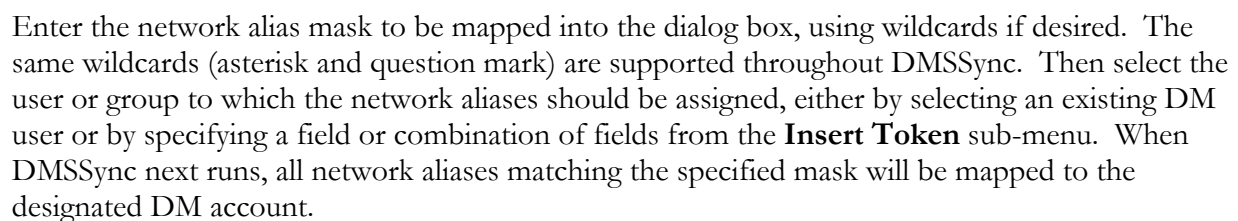
To select a variable, click the ellipses to the right of the default map text boxes and select the desired variable from the appropriate menu. Using these variables, a network account named SM09421 could be mapped to a DM user more descriptively named WGS-L-VM_TJSmith using the following mapping:

[DOMAIN]_[FIRST_INITIAL][LAST_INITIAL][LAST_NAME]

User and Group Maps – By Domain

Specific User and Group Maps – By Domain

To map multiple network aliases to a single user or group, expand the appropriate domain and select either the Users or Groups from that domain. Click the **Add** button to create a new mapping:



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Manage Maps: Export

Once user and group maps have been configured, they can be exported either to save as a backup, or to import into another DMSSync installation. Select **Manage Maps | Export | User Maps** or **Group Maps** to save the current user or group maps as a tab-delimited text file. You will be prompted to specify a file name for the export text file.

Manage Maps: Import

To import a saved set of user or group maps, select **Manage Maps | Import | User Maps** or **Group Maps**. Be careful to select the correct item (user or group), as DMSSync will not make a distinction between the two during the import process.

Note that DMSSync can import user or group maps from any text file in any delimited format as long as the first column references the domain, the second column contains the network alias mask, and the third column provides the DM user or group ID.

After selecting a text file, the DMSSync Import Wizard will launch. First, DMSSync needs to parse the text file. Select the appropriate delimiter and set the starting row as appropriate:

Import Group maps: Step 1 of 3

This screen lets you set the delimiters your file contains. You can see how text is affected in the preview below

Delimiters

☒ Tab ☐ Comma ☐ Space ☐ Treat consecutive delimiters as one

☐ Semicolon ☐ Other:

Start import at row:

File: C:\Documents and Settings\WINADMIN\Desktop\ExportedUserMaps.txt

Preview

	Domain	Network alias	DM Group ID
1	wGSL-VM	AccountingMIA	ACCOUNTING
2	wGSL-VM	AccountingNY	ACCOUNTING
3	wGSL-VM	AccountingLA	ACCOUNTING
4	wGSL-VM	HRDMIA	HRD
5	wGSL-VM	HRDNY	HRD
6	wGSL-VM	HRDLA	HRD
7	OTTAWA	HRDMIA	HRD

Cancel << Back Next >>

Click **Next** to proceed. After a short pause, DMSSync will present a list of all new maps that will be created. Maps that you do not wish to be process can be removed by selecting the row and clicking the red delete icon; any maps from domains not registered in DMSSync or maps that already exist are automatically moved to the list of excluded maps.

Import Group maps: Step 2 of 3

This screen lets you see final set of maps that will be created. You can also exclude specific maps by deleting them from the list below. Network aliases from domains that are not registered in DMSSync or maps that already exist are automatically removed.

6 new maps will be created:

Domain	Network alias	DM User ID
WGSL-VM	AccountingMIA	ACCOUNTING
WGSL-VM	AccountingNY	ACCOUNTING
WGSL-VM	AccountingLA	ACCOUNTING
WGSL-VM	HRDMIA	HRD
WGSL-VM	HRDNY	HRD
WGSL-VM	HRDLA	HRD

1 excluded maps:

Domain	Network alias	DM User ID
OTTAWA	HRDMIA	HRD

Buttons: Cancel, << Back, Next >>

Click **Next** to complete the Import. DMSSync will create the new maps and provide a report upon completion. Click **Finish** to exit the wizard.

Initialize Library

Although the first DMSSync library is initialized the first time DMSSync is run, you may wish to initialize multiple libraries in your enterprise. To initialize additional libraries, select **Initialize Library** from the **File** menu. You will be presented with a list of available libraries (those which are defined as remote libraries of the current library); place a checkmark next to all libraries you wish to initialize. These libraries will then be available for synchronization with DMSSync.

Options

Once configured, DMSSync options can be locked from modification by clicking on the padlock icon in the lower-left corner of the options form. Click the lock icon again to un-lock the form. Although this feature does not prevent someone from changing the DMSSync options, it does prevent accidental modification of any of the critical configuration items.

General

DMSSync application and synchronization options can be configured from the **File | Options** menu item. Registration and serial number information is entered on the General tab, and the log file location can be specified. If DMSSync is only to run against one library in a multi-library environment, you can select **Connect and show only current library on start** to verify that no other libraries are synchronized with DMSSync.

Synchronization Options

The following synchronization options can be configured in DMSSync:

The screenshot shows the 'Options' dialog box with the 'Synchronization options' tab selected. The 'Root group' is set to 'DOCS_USERS'. The 'Allow multiple network alias to be assigned to a DM user' checkbox is unchecked. The 'Synchronize existing User ID to Network Alias' checkbox is unchecked. The 'Use domain' dropdown is set to 'WGSL-VM'. The 'Disable Users with No Network Aliases and blank password' checkbox is checked. The 'Set user's primary group to match domain primary group' checkbox is checked. The 'Default primary group' is set to 'DOCS_USERS'. The 'Use domain' dropdown is set to 'WGSL-VM'. The 'Match domain primary group for users with a primary group DOCS_SUPERVISORS or group with administrative privileges' checkbox is unchecked. The 'User synchronization mode' section has 'Synchronize all users' selected. The 'Group synchronization mode' section has 'Synchronize all groups' selected. The 'Retrieve all domain groups' checkbox is unchecked. The 'Synchronize group membership' checkbox is checked. The 'Remove member users with no network aliases and blank password' checkbox is checked. The 'Remove member users with no network aliases and attaché/unplugged password' checkbox is unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

Root Group: DMSSync can be configured to use a different base group than DOCS_USERS, although cases in which this is appropriate may be rare. To specify a different root group, click the ellipses and select the appropriate group from your library.

Allow multiple network aliases to be assigned to a DM user: Select this option to allow DMSSync to assign multiple network aliases to a single DM user.

- **Synchronize existing User IDs to Network Alias:** This option tells DMSSync to synchronize user IDs already in the library with the appropriate network alias from the domain.
- **Use domain as preferred source for columns maps:** Specify the Domain from which to use the Maps when allowing multiple network aliases.

Disable users with no Network Alias and blank password: Selecting this option will cause DMSSync to disable DM users who have no matching network aliases and blank DM passwords.

Set user's primary group to match domain primary group: DMSSync can force DM user accounts to have the same primary group in their library as the matching network account has on the domain.

- **Default Primary Group:** Specify a default primary group to be used if none is specified at the network level. DOCS_USERS is the default.
- **Use domain as a primary Domain for user's primary group:** Specify from which domain the primary group information should be retrieved.
- **Match domain primary group for users with a primary group**
DOCS_SUPERVISORS or group with administrative privileges: This option allows to whether or not matching the primary group for administrative groups.

User Synchronization Mode: DMSSync can be configured to synchronize all users or only those accounts that match one of the configured user maps.

Group Synchronization Mode: DMSSync can be configured to synchronize all groups or only those groups that match one of the configured group maps.

- **Retrieve all Domain groups: ????????????**

Synchronize Group Membership: Select this option to have DMSSync re-create all group memberships in the library that are present on the domain. Options to remove network users with no network aliases and black passwords or unplugged passwords are available.

Running DMSSync

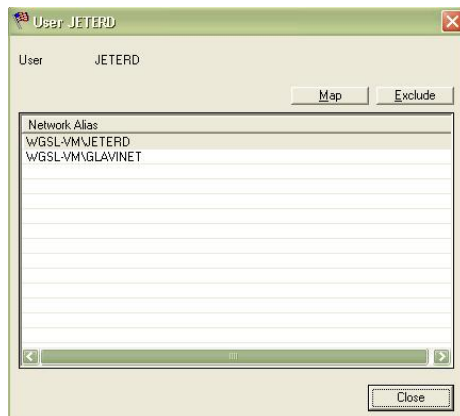
Once DMSSync has been fully configured, you can run the application in test mode before applying all changes. On the main DMSSync application, click the **Test** button, located between the **Go!** and **Exit** buttons.

DMSSync will analyze all configuration options against the selected libraries and display a report of all conflicts, new items, and deletions:

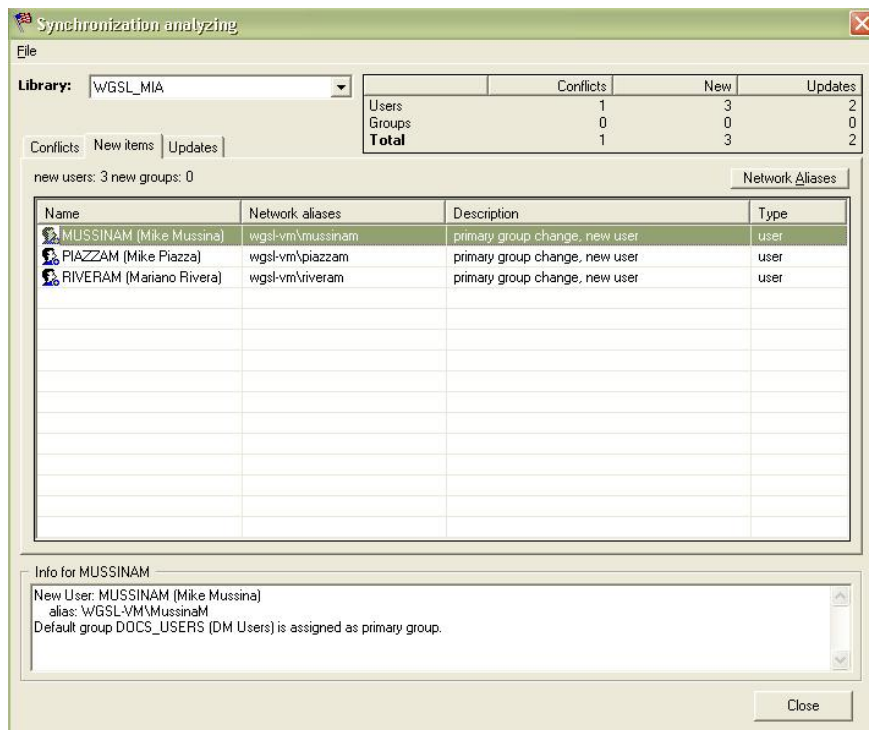
[illegible]

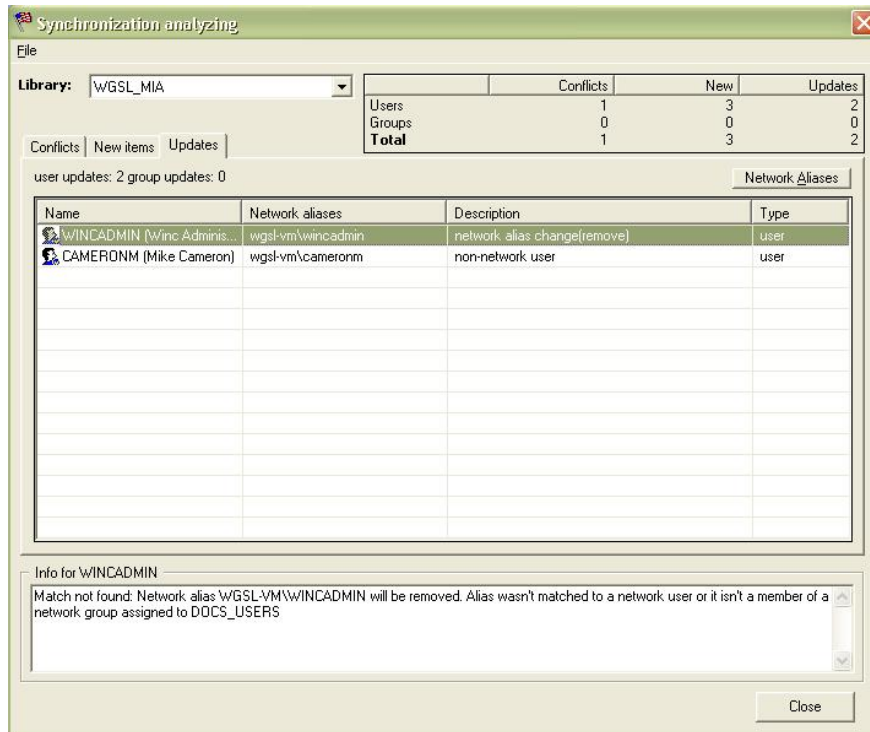
Specific information regarding the conflicts can be viewed by clicking on a row and viewing the information displayed at the bottom of the form.

To take action on a conflict, select the **Conflicts** tab, highlight a row and click the **Network Aliases** button. DMSSync will display the currently mapped network alias or aliases; you can create a new map for that account by clicking the **Map** button or you can remove the account from processing by clicking the **Exclude** button.



New items and updates can also be modified from their respective tabs; select any row and click the **Network Aliases** button to create a new map or exclude the account from processing. Information about new or updated accounts can be viewed at the bottom of the form.





Click **Close** when you are satisfied that DMSSync will process all accounts as desired. Click **Go!** to begin processing DMSSync changes into production.