



Active Directory Integration of User Accounts

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Americas Headquarters

OAISYS

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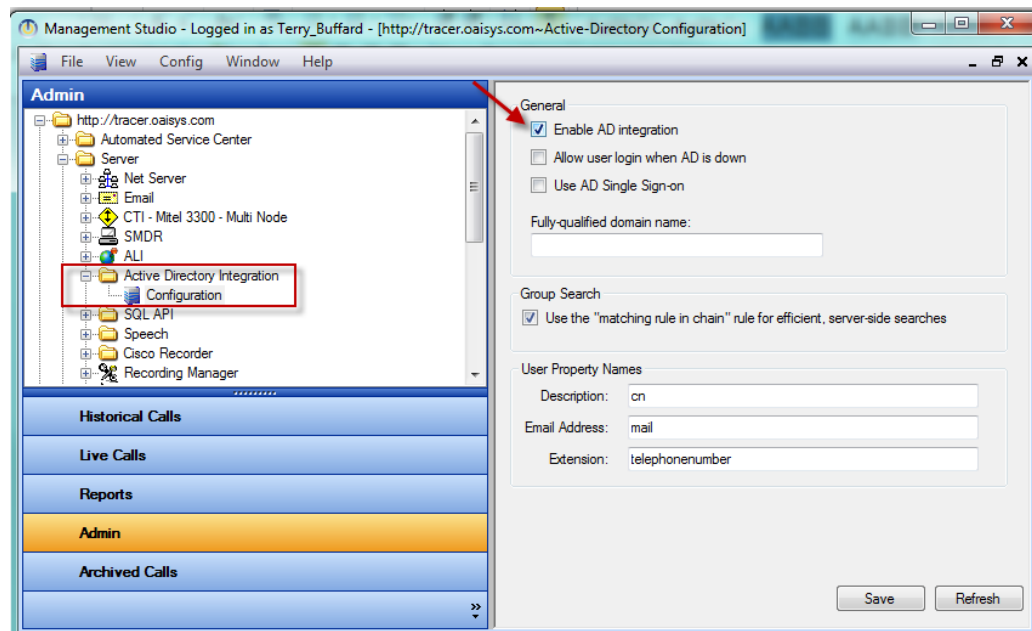
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SET UP USER ACCOUNTS USING ACTIVE DIRECTORY

AUTOMATIC USER CREATION

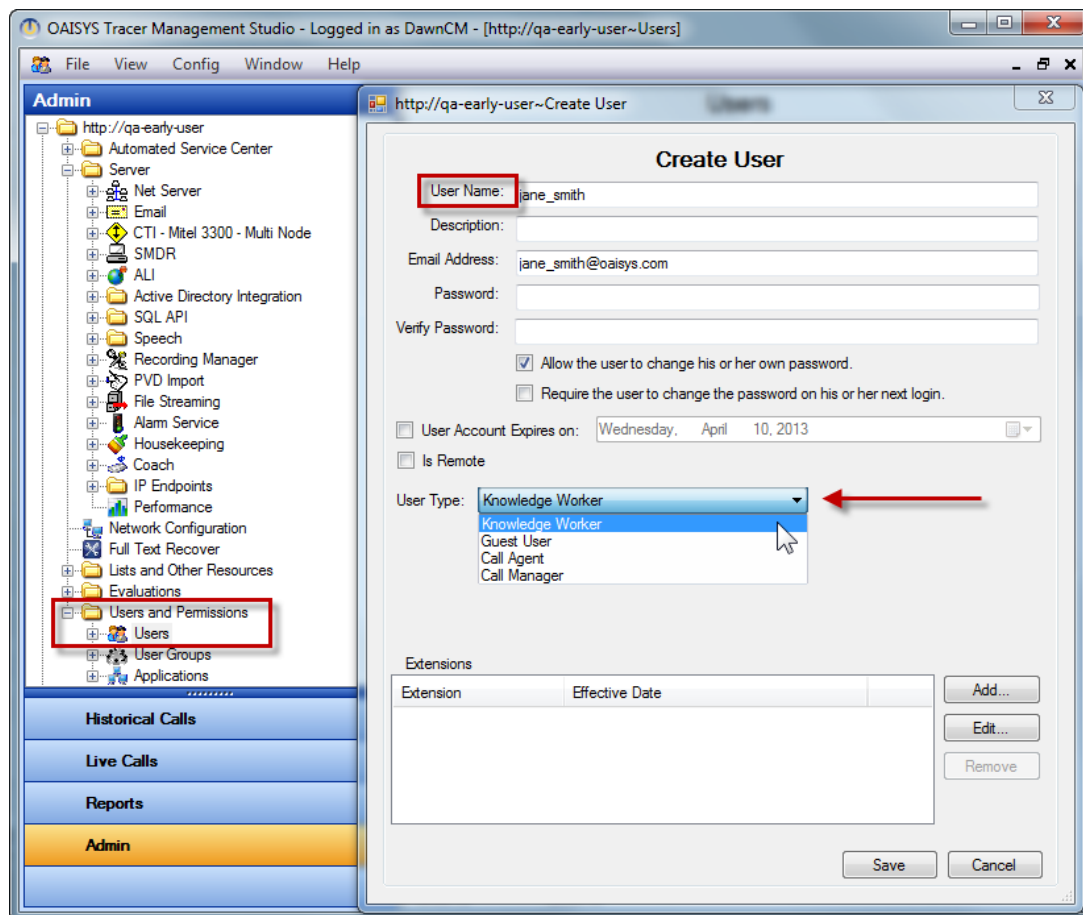
1. From Active Directory Integration → Configuration
 - a. Check the Enable AD Integration box
 - b. Enter fully qualified domain name
 - c. For most applications, defaults for the other fields can be used



2. An associated OAISYS user account will automatically be created IF a user installs the OAISYS client application and logs in with their domain credentials using the "Windows Authentication" method in the drop down
 - a. These users will be established as Knowledge Worker user types and have the default Knowledge Worker permissions
 - b. The email address, password, and extension information will be imported from AD
 - c. Groups that the user is a member of will be created in OAISYS at the time of login
 - d. All permissions in OAISYS will need to be set after the user or group has been created

MANUAL USER CREATION

1. Determine which users will have an OAISYS account
2. Review the selected users in Active Directory and create a list of their User Names
3. Create users in the OAISYS Administrator with their matching Active Directory User Names
 - a. Verify the user names are an exact match
4. Complete the User Name Field and the User Type
 - a. All other information will be imported from Active Directory



5. Administer the OAISYS Users
 - a. Add them to the User Groups and enable the desired permissions
6. Users that were preconfigured in OAISYS will be synced with Active Directory at user login
 - a. The email address, password, and extension information will be imported from AD