

IDSync® AD CLOUD PORTAL

Internet Browser Access to Microsoft Active Directory for user management.

Installation Guide



IDSync[®] AD Cloud Portal

Cloud Based AD Management

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Revision History

04-2017

1. Initial Documentation.

10-2017

2. General format changes.
3. Addition of new purchase options

12-2017

4. Addition of Glossary / Concepts.

General Information

Introduction

The purpose of this document is to provide the System Administrator and other technical stakeholders with a complete and easy guide to install and configure this software.

System Overview

IDSync® AD Cloud Portal (ADCP) provides a secure means for a managed service provider, service desk or any other service department to manage their own on-premise AD Users and Groups Accounts or those of their customers via a web-browser, from on-premises or remote locations.

As depicted in figure 1-1 below, the IDSync® infrastructure provides secure data tunnels between the customers' network and the ODIN Marketplace, allowing any user with the proper level of rights to log in to ADCP and perform functions such as enabling/disabling AD Users, changing passwords for such users, unlocking locked accounts, etc. (the actual level of delegation depends on the customer needs or preferences). This document focuses on how to configure and manage such levels of delegation.

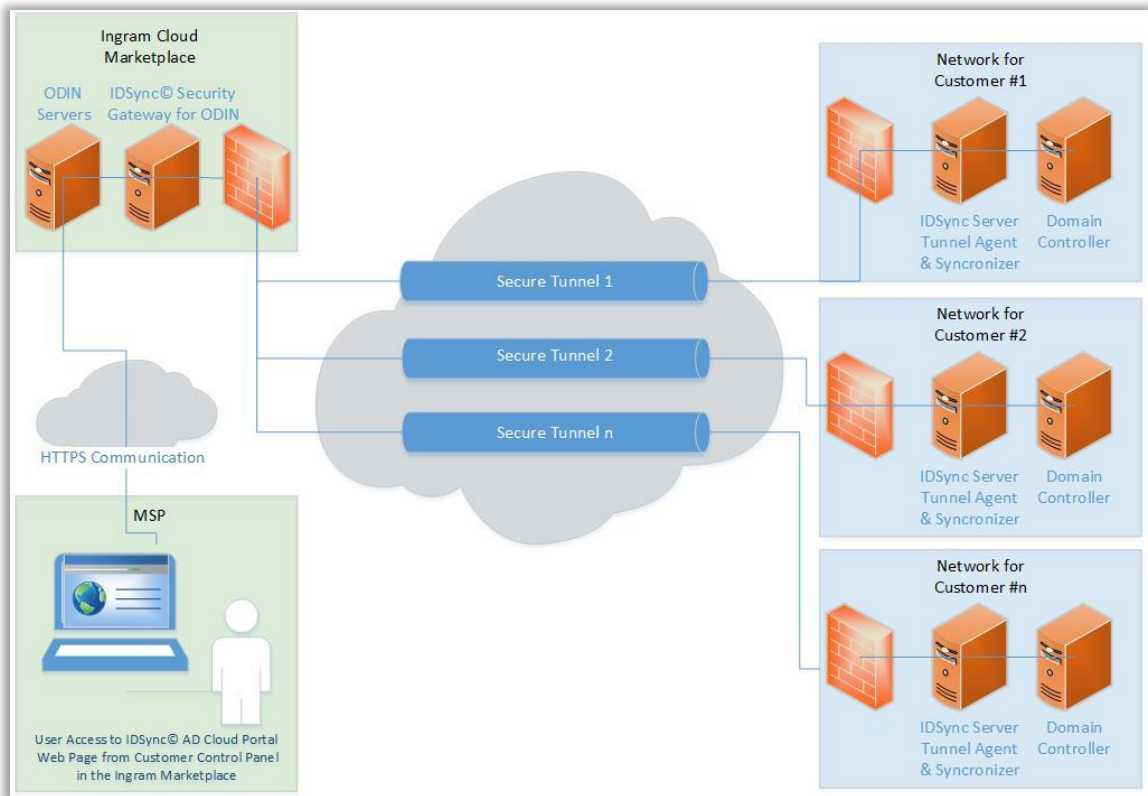


Figure 1-1

General Information

System Components

The **IDSync® Cloud Portal System** consists of four components (see figure 1-2):

- **IDSync® Management Studio** – The **IDSync® Management Studio** is the interface that provides the means to configure the **IDSync® System** and to install and monitor the **IDSync® Services**, which are necessary for communications between Active Directory and the AD Cloud Portal interface.
- **IDSync® Security Studio** – It's the configuration center for Security Users, Profiles and Scopes, which form the foundation to provide and limit the Security Rights and Access Levels that each user requires and is permitted.
- **IDSync® Services** – These applications operate in background and provide the required communication between Active Directory and the Cloud Portal interface.
- **IDSync® Cloud Console** – This is the cloud-based interface where the remote actual administration of the AD Users, Groups and Computers is enabled.

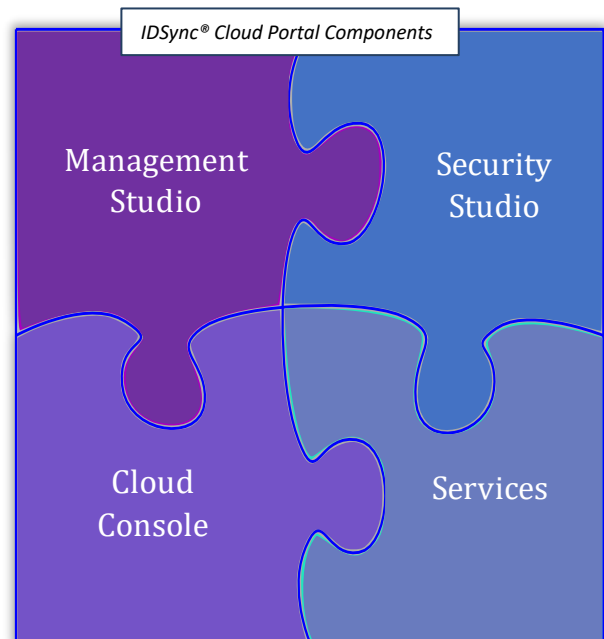


Figure 1-2

These components build their configurations and operations on top of a SQL Server database, where they store all the data they need to work.

This guide will focus on the installation process of the **IDSync** solution. More information about the **IDSync® Management Studio** and the rest of the components is available in their respective User Guides.

IDSync® Server and System Requirements

1. IDSync® Management Studio server:
 - a. Windows Server 2008 (all versions) or above. Virtual or physical devices are supported. There's no need for a dedicated server for this component.
 - b. 32 or 64-bit Supported.
 - c. .NET Framework 4.6 (or above). It will be automatically installed by IDSync® if not available on the machine.
2. Microsoft SQL Server
 - a. Both Microsoft SQL Server or Microsoft SQL Server Express editions are supported.
 - b. SQL Server Instance must be configured for US English Code: 1033/en_US
3. TCP/IP and Named Pipes protocols must be enabled on the server
4. SQL Server and SQL Server Browser services must be Running
5. Mixed-mode authentication must be enabled on the SQL Server
6. Microsoft SQL Server Management Studio is needed for support and troubleshooting purposes.
7. If Enabled, the local firewall on the SQL Server must permit traffic on the ports that are in use by both the SQL Server Service and the SQL Browser service.

Security Requirements

1. Domain Administrator access privileges
2. Database Administrator account
3. SQL Service account for IDSync
 - a. Account that IDSync will utilize to connect to the database

AD Cloud Portal Concepts

- ☞ Cloud Portal User: Any individual who is authorized to access the ADCP (using the Cloud Console or the Security Studio).
- ☞ Cloud Portal Group: A collection of Cloud Portal Users who share a common set of characteristics (for example, a common Security clearance level).
- ☞ AD Secured Objects: Any User, Group, Contact or Computer within an Active Directory environment that may be managed via ADCP.
- ☞ Security Feature: Any function that can be performed by a Cloud Portal User on an AD or Security Object, for example, editing User's Properties or running a Report.
- ☞ Features Profile: A list of Security Features that have been assigned to a Cloud Portal User or Group of Users and they can perform.
- ☞ Scope: A list of AD Users, Groups or Organizational Units that can be managed by a Cloud Console User. Along with Cloud Portal Users and Features, Scopes define a Security Profile.
- ☞ Self-Service Profile: An interface to perform functions (actions) limited to a single AD User (independent of other service Users), making faster and more convenient transactions (e.g., a User changing his own password).
- ☞ Pre-defined and Customized Reports: Specific and organized information showing the current state of a given set of Objects (e.g., a list of all Cloud Portal Users with assigned Profiles and Scopes). ADCP offers a Report Designer to build detailed and fully customized reports.
- ☞ Managed Users Report: A list of AD Users that are manageable via AD Cloud Console.
- ☞ Transactions: A list of changes that have occurred via ADCP. Such changes include: actions made on the Security Module (e.g., modifying a profile or a scope) as well as changes made to AD Objects (e.g., changing a User's Home Address).

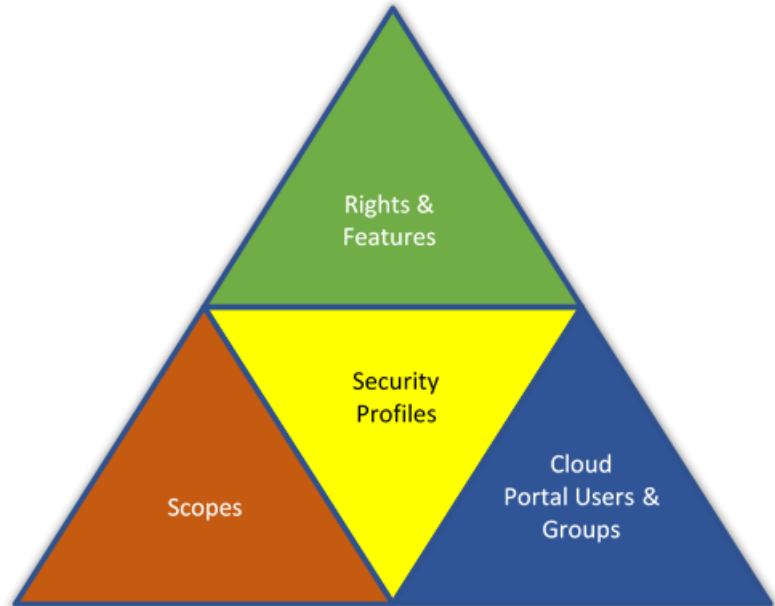


Figure 1-3

Deploying IDSync® AD Cloud Portal

Deploying the IDSync® System includes four basic steps:

Ordering,
Downloading,
Installing and
Configuring.

Each one of these steps will be explained in the following sections.

Ordering

The IDSync® System can be ordered via the Ingram Micro's Market Place or via other Odin-based Control Panels.

If you're using the Ingram Micro's Market Place please continue to the next page, otherwise go to page 16 to see the detailed ordering process.

Ordering IDSync® AD Cloud Portal using Ingram Micro's Marketplace

- Open the Ingram Marketplace website www.ingrammicrocloud.com.
- Then, select the [Cloud Services](#) menu option. See figure 2.1-1.

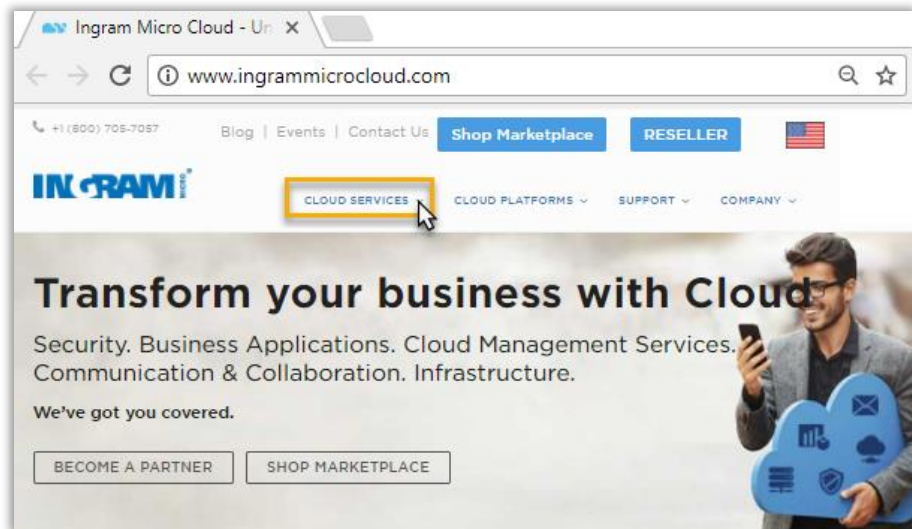


Figure 2.1.-1

- Look for and click on [Cloud Enablement Services](#) from the Marketplace website as shown in figure 2.1-2.

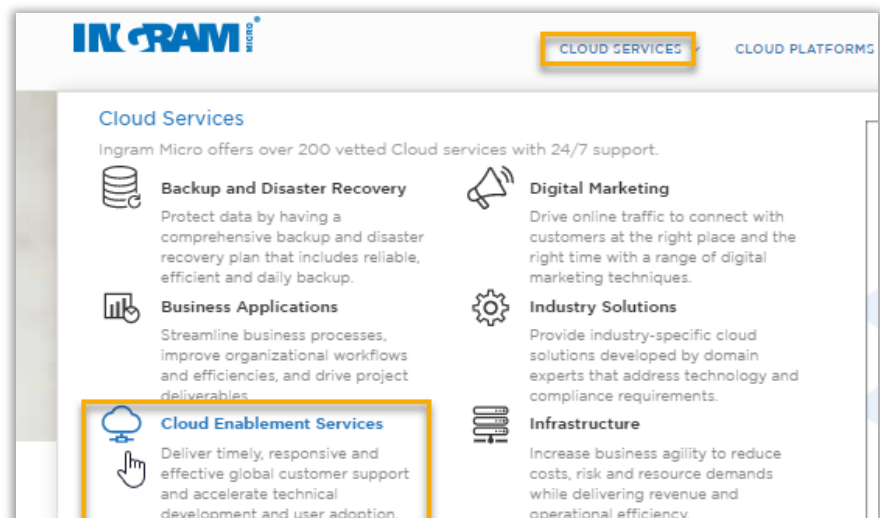
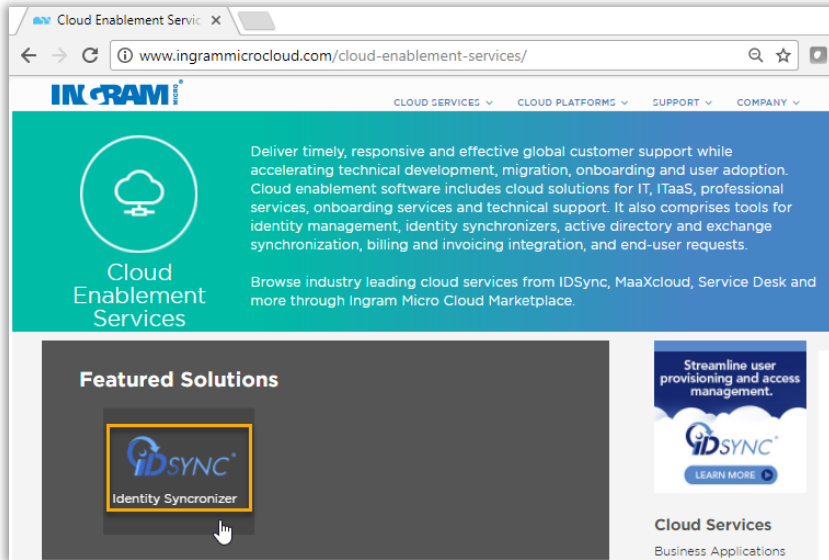


Figure 2.1-2.

Ordering IDSync® AD Cloud Portal using Ingram Micro’s Marketplace



- Select IDSync – Identity Synchronizer from the Cloud Enablement Services menu, as shown in figure 2.1-3.

Figure 2.1-3.

A product screen describing the features of Identity Synchronizer® will display as shown in figure 2.1-4.

- If you haven’t logged in to the Marketplace yet, then click on the **LOG IN** link

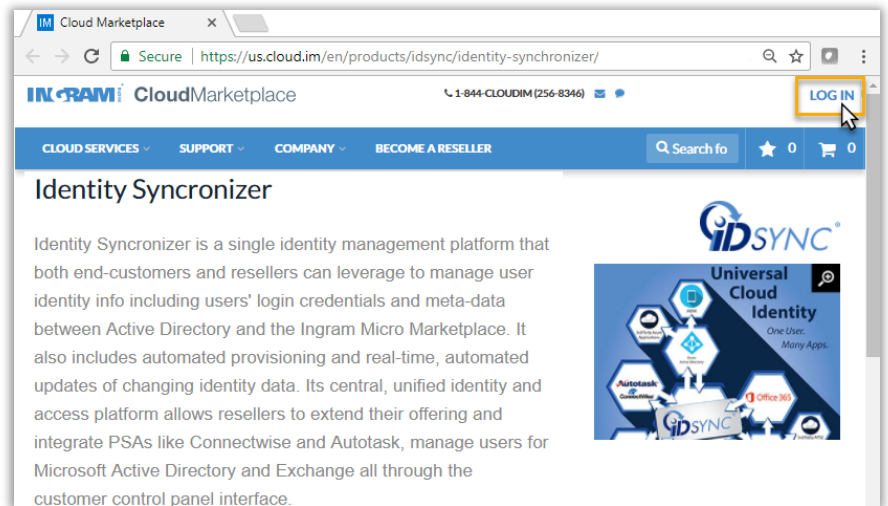


Figure 2.1-4

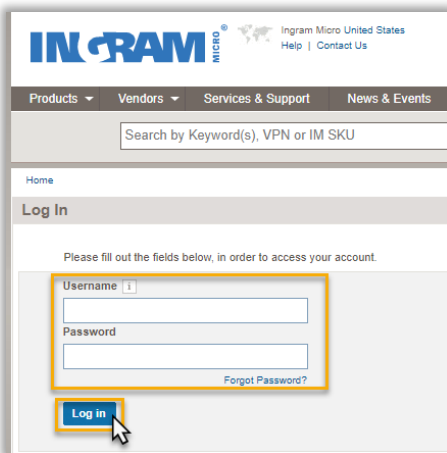


Figure 2.1-5

- In the subsequent page (see figure 2.1-5), fill out the corresponding fields with the proper credentials.
- And, click on **Log In**

Ordering IDSync® AD Cloud Portal using Ingram Micro's Marketplace

- Scroll down and locate the menu for selecting between reseller and customer plans (see figure 2.1-6).
- Select "Reseller Plans" if you will be purchasing IDSync for use in your own company or "Customer Plans" if you will be purchasing for a customer.
- Click on **Buy Now** when ready.

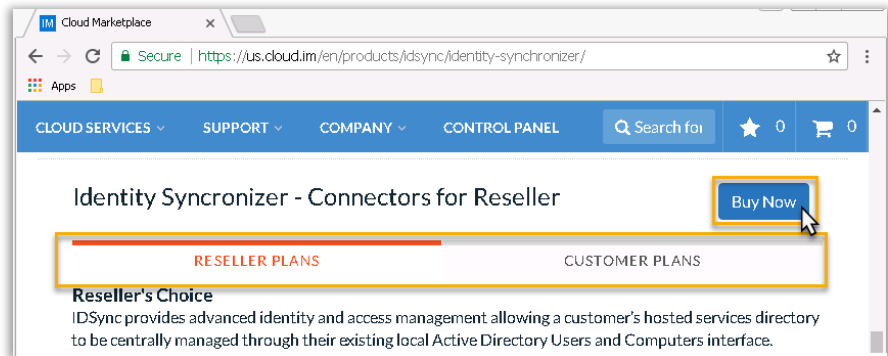


Figure 2.1-6

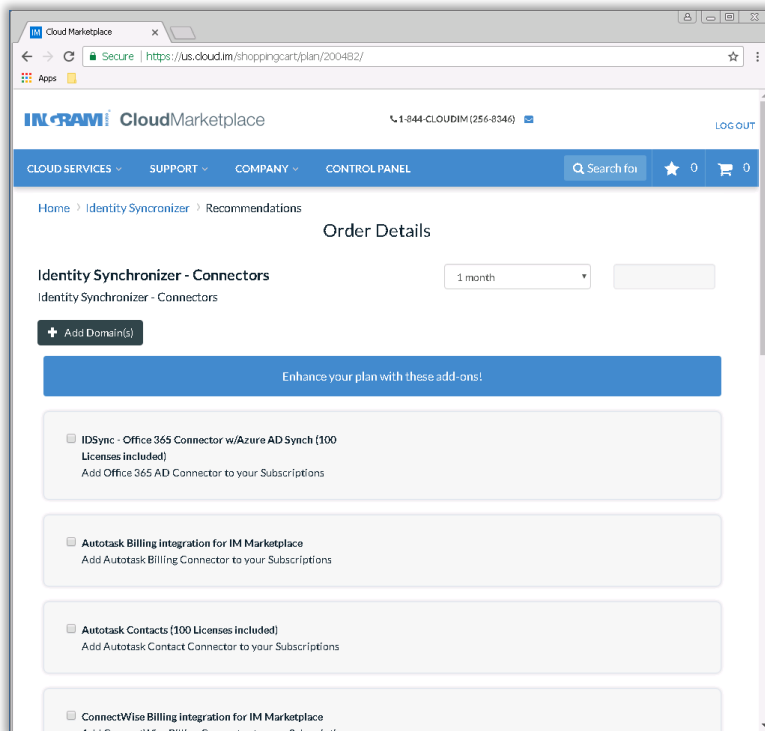


Figure 2.1-7

The ordering screen (figure 2.1-7) will display and will list all the IDSync "Connectors".

- As shown in figure 2.1-8, now select the duration period for your plan.

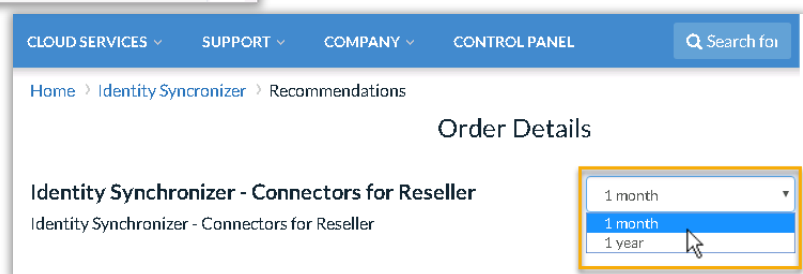


Figure 2.1-8

Ordering IDSync® AD Cloud Portal using Ingram Micro's Marketplace

- Then, you will want to scroll down the list and find the options for AD Cloud Console AD Management via ODIN Automation as shown in figure 2.1-9.

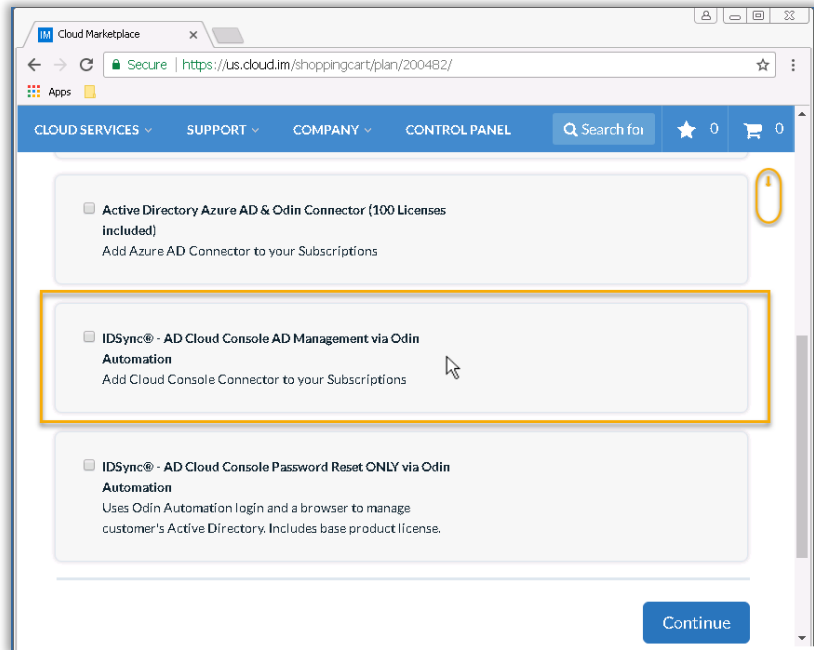


Figure 2.1-9

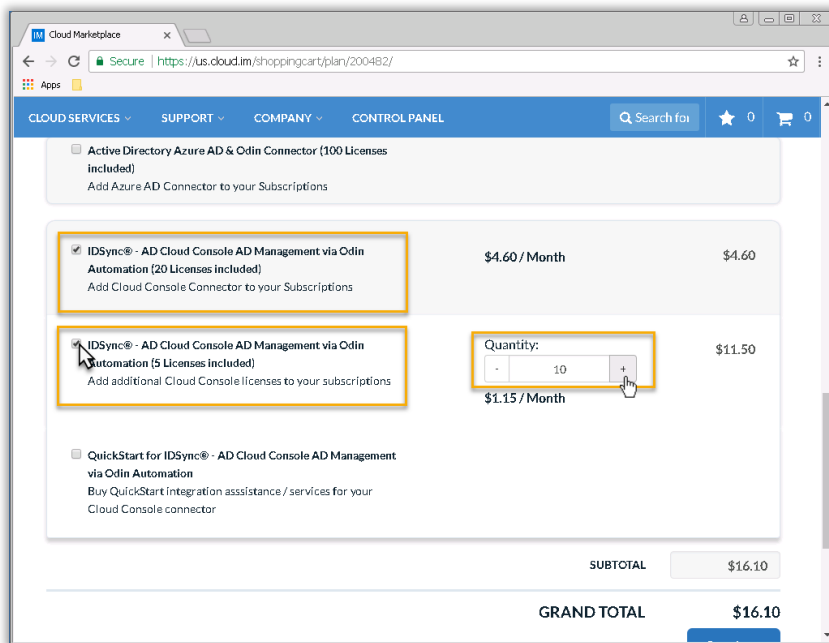


Figure 2.1-10

The base connector is licensed to manage 20 Active Directory users.

- If the Active Directory that you will be managing has more than 20 users, order **additional User Licenses** as indicated in figure 2.1-10. Note that the Additional User Licenses are grouped in 5 licenses bundles.

Ordering IDSync® AD Cloud Portal using Ingram Micro's Marketplace

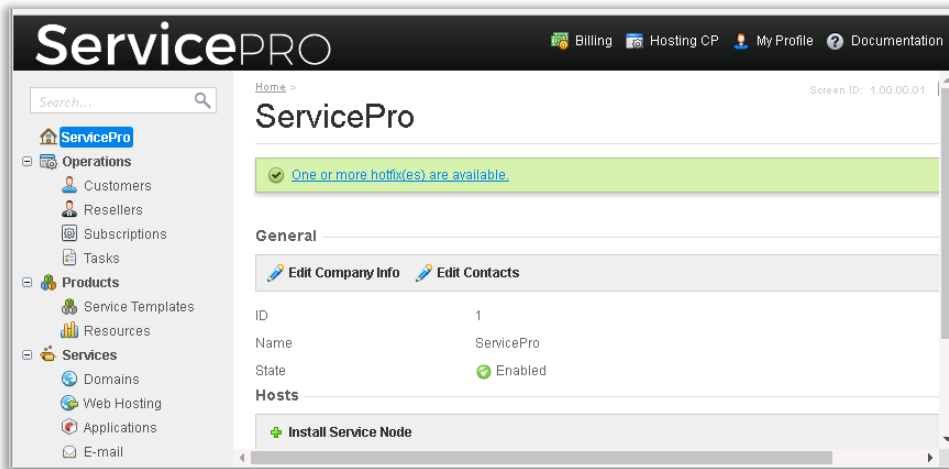
After all your selections have been made, click on the [Continue](#) button as shown in figure 2.1-11 to finish the purchase of your IDSync subscription.



Figure 2.1-11

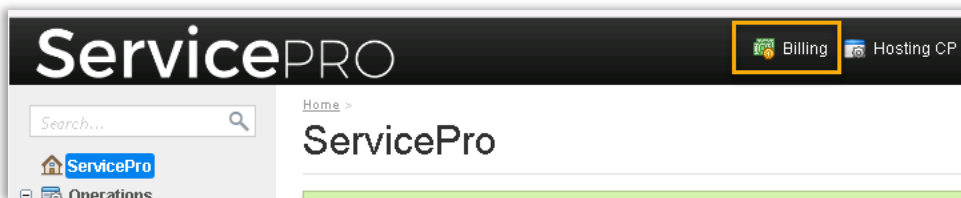
Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

If your operation is based on an Odin Automation's platform, here's how you buy a new subscription, or add the IDSync AD Cloud Portal solution to your valid current subscription.



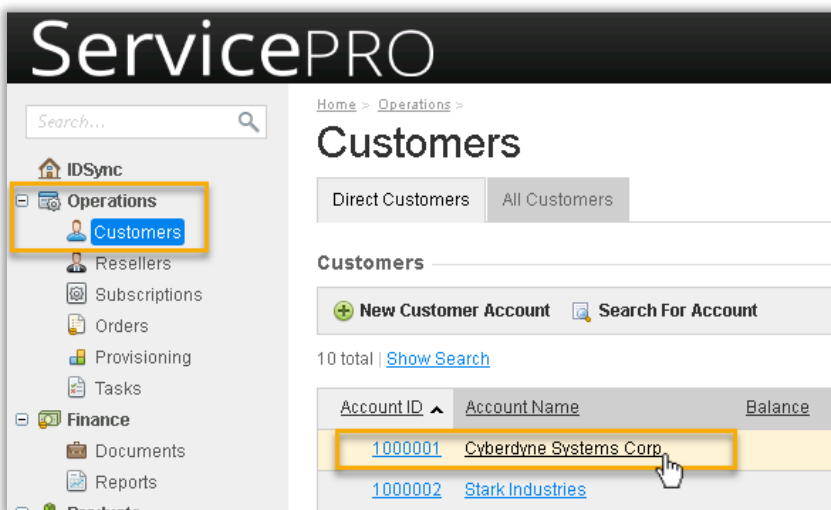
- Log in to the Reseller Control Panel (see figure 2.2-1).

Figure 2.2-1



- Switch to the Billing portion of your panel (figure 2.2-2).

Figure 2.2-2



- Navigate to **Customers** (look for this link in the menu at your left, under **Operations**). See figure 2.2-3.
- Then, click on the **Account Name** link for the customer whose account you would like to add subscriptions to.

Figure 2.2-3

Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

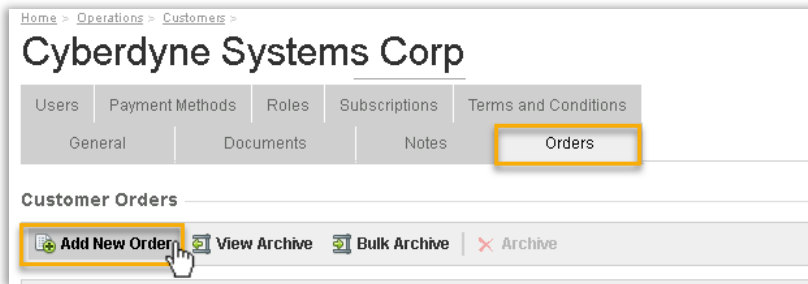


Figure 2.2-4

- Click on the 'Orders' Tab (see figure 2.2-4).
- Then, click on 'Add New Order'.

- You need to specify the correct settings for your subscription (use the magnifying glass icon beside each option, see figure 2.2-5).

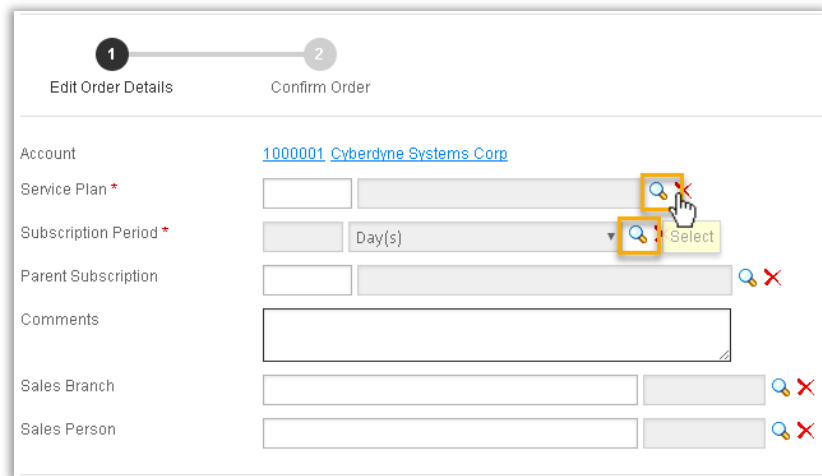


Figure 2.2-5

- First, define the Service Plan:
 - Click on the magnifying glass (see figure 2.2-6).

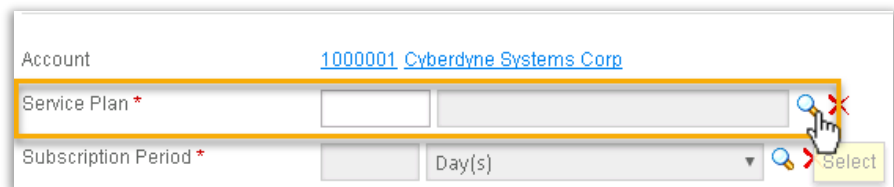


Figure 2.2-6

Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

- Then, in the pop-up window (figure 2.2-7), look for the 'Identity Synchronizer' service plan, and click on its name to select it.

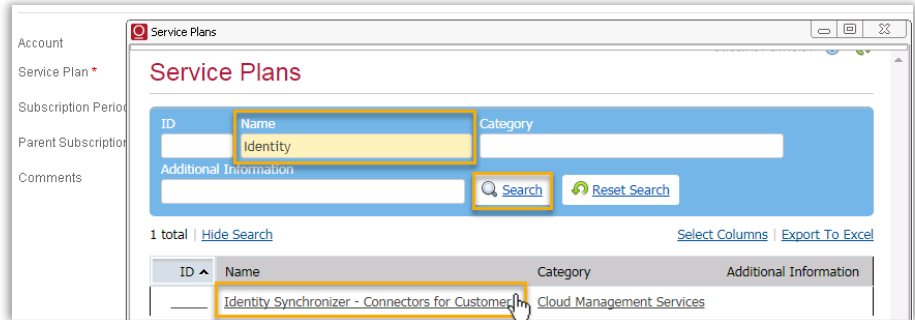


Figure 2.2-7

- Now, select the Subscription Period, by clicking on the icon to the right of that field (see figure 2.2-8).

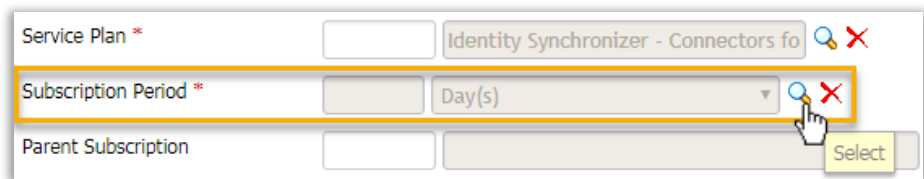


Figure 2.2-8

- And, click on the desired Subscription Period from the pop-up window (as shown in figure 2.2-9).

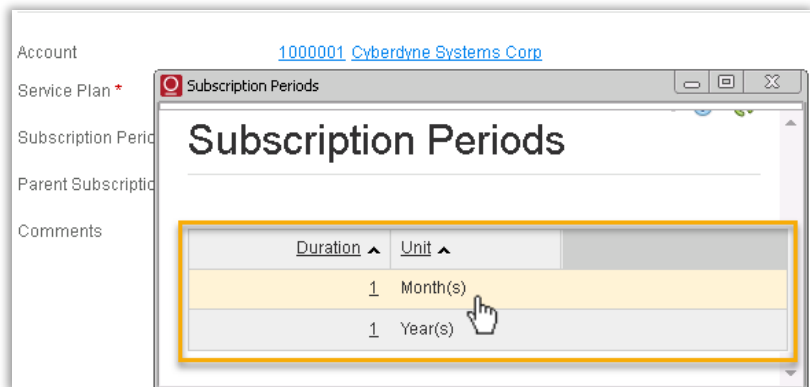


Figure 2.2-9

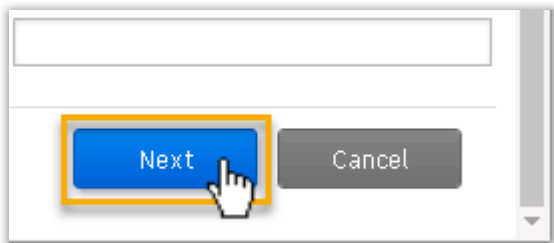


Figure 2.2-10

- Then, click 'Next' to proceed to the next wizard step (figure 2.2-10).

Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

- Enter your customer's domain name (*optional*), then click **Next** to proceed (see figure 2.2-11).

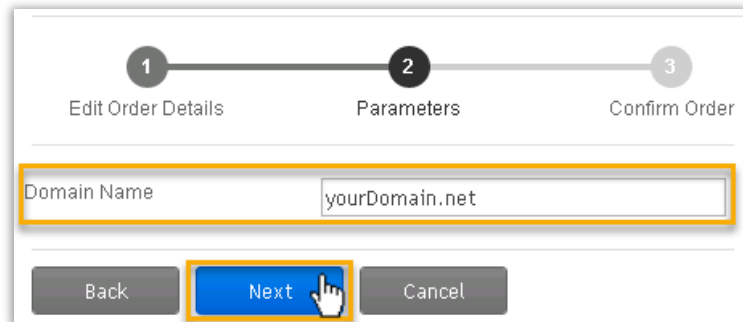


Figure 2.2-11

- Review your current order and select a **Payment Method** (see figure 2.2-12)
- Click on **Place Order** to check out your purchase.

Here you can review your order and select payment method.

Order Information

Total \$4.60

Comments Order for the "Identity Synchronizer - AD Cloud Portal" Plan for 1 Year(s). Identity Synchronizer - AD Cloud Portal

Promotion Code [Apply](#)

Order Details

ID	Description	Detail Type	Quantity	Duration	Unit Price	Extended Price
1	Identity Synchronizer - AD Cloud Portal	Plan	1.00 item		\$4.60	\$4.60

Payment Information

Payment Method *

*Required fields

Back **Place Order** Order Additional Resources Cancel

Figure 2.2-12

- Or, click on 'Order Additional Resources' to add other products (such as a QuickStart service or additional seats) to your plan (figure 2.2-13).

Order Details

No Order Details Available

*Required fields

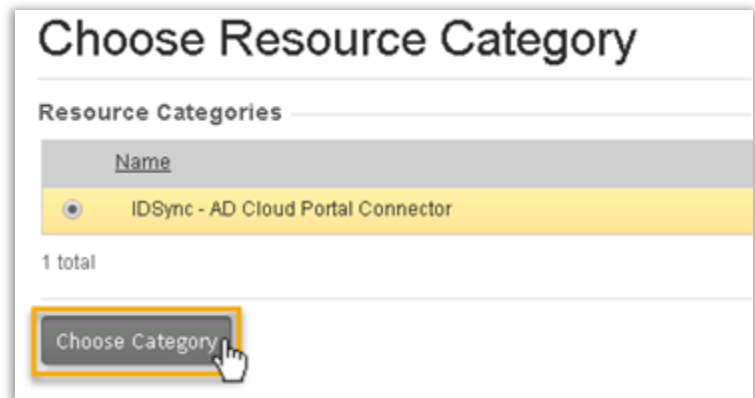
Order Additional Resources

Figure 2.2-13

Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

If you choose to add Additional Resources, you'll be presented with a list of all possible resources associated with the plan you're subscribing to.

- Choose a Resource Category and click on the 'Choose Category' button (as shown in figure 2.2-14).



Choose Resource Category

Resource Categories

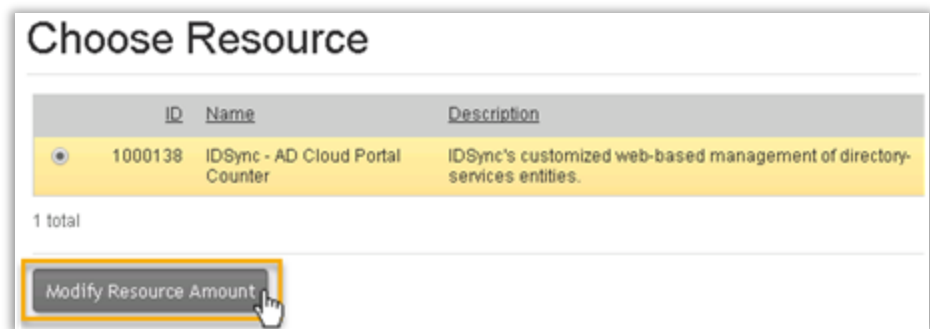
Name
<input checked="" type="radio"/> IDSync - AD Cloud Portal Connector

1 total

Choose Category

Figure 2.2-14

- Then, choose the Resource, and, click on 'Modify Resource Amount' (see figure 2.2-15).



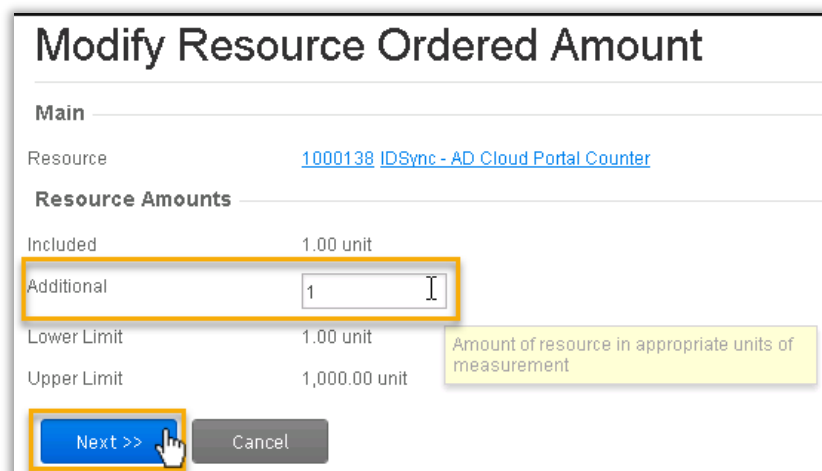
Choose Resource

ID	Name	Description
<input checked="" type="radio"/> 1000138	IDSync - AD Cloud Portal Counter	IDSync's customized web-based management of directory-services entities.

1 total

Modify Resource Amount

Figure 2.2-15



Modify Resource Ordered Amount

Main

Resource: [1000138 IDSync - AD Cloud Portal Counter](#)

Resource Amounts

Included	1.00 unit
<input type="text" value="1"/>	
Lower Limit	1.00 unit
Upper Limit	1,000.00 unit

Amount of resource in appropriate units of measurement

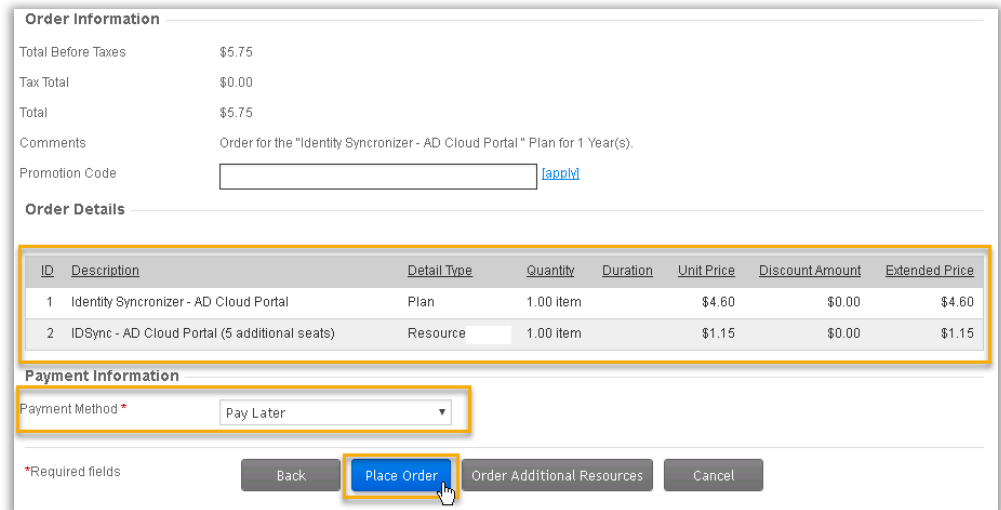
Next >> Cancel

Figure 2.2-16

- Select the Additional amount you require, then click 'Next' (see figure 2.2-16) to go back to the Order Information page.

Ordering IDSync® AD Cloud Portal using an Odin-based Control Panel

- Once again, review your Order and Payment Method, then click on 'Place Order' to check out your purchase (see figure 2.2-17).



Order Information

Total Before Taxes \$5.75
Tax Total \$0.00
Total \$5.75
Comments Order for the "Identity Synchronizer - AD Cloud Portal" Plan for 1 Year(s).
Promotion Code [\[apply\]](#)

Order Details

ID	Description	Detail Type	Quantity	Duration	Unit Price	Discount Amount	Extended Price
1	Identity Synchronizer - AD Cloud Portal	Plan	1.00 item		\$4.60	\$0.00	\$4.60
2	IDSync - AD Cloud Portal (5 additional seats)	Resource	1.00 item		\$1.15	\$0.00	\$1.15

Payment Information

Payment Method *

*Required fields

Figure 2.2-17

The purchase order will be placed, and, depending on the selected payment method, it may be automatically paid, and service provisioning will start (otherwise, the order needs to be reviewed, approved and a respective payment must be attached).

Downloading the IDSync® Management Software

Now that your subscription is active, you need to download, install and configure the IDSync® connector.

- Log in to the Reseller Control Panel for ODIN.
- Then, select **Operations > Customers**.
- Look for the Customer you want to download the

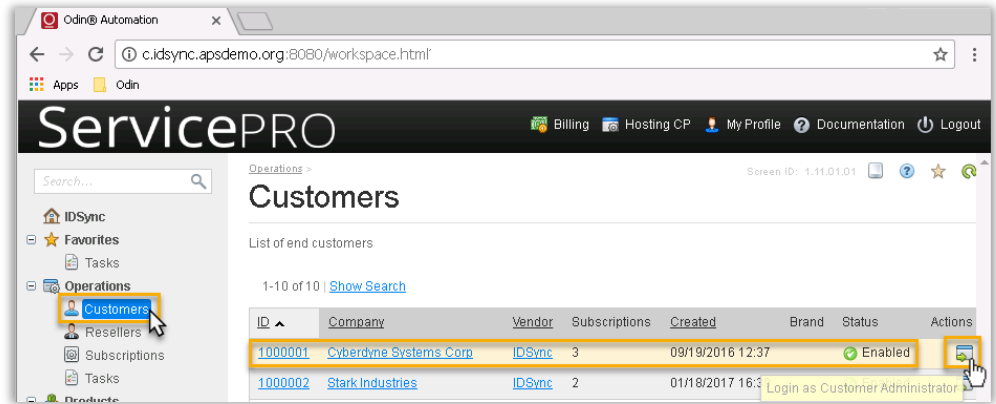


Figure 2.3-1

software for, and click on the icon at its right, to login as an Administrator for this customer (as shown in figure 2.3-1).

- When the customer's Control Panel displays, select the IDSync subscription from the list of active subscriptions as shown in Figure 2.3-2.

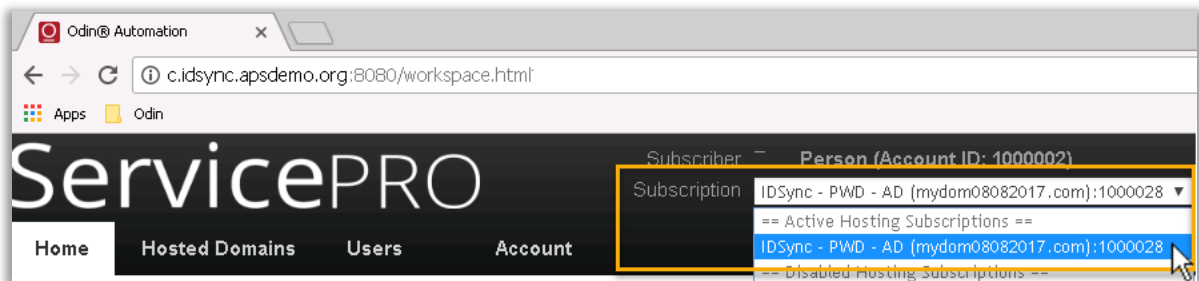


Figure 2.3-2

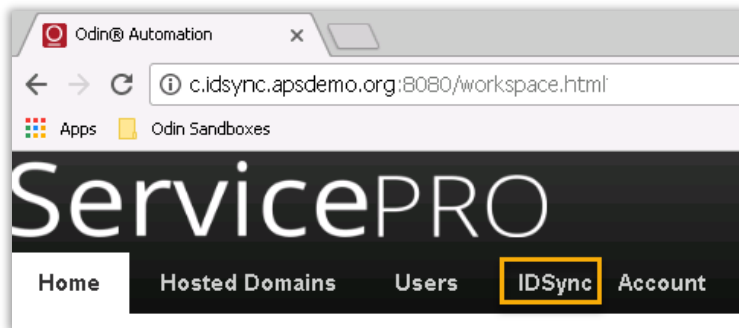


Figure 2.3-3

- Once you have selected the IDSync subscription from the customer control panel, an IDSync tab will appear as shown in figure 2.3-3.

Downloading the IDSync® Management Software

- Click on the IDSync tab and the configuration screen for IDSync AD Cloud Portal will display (figure 2.3-4).

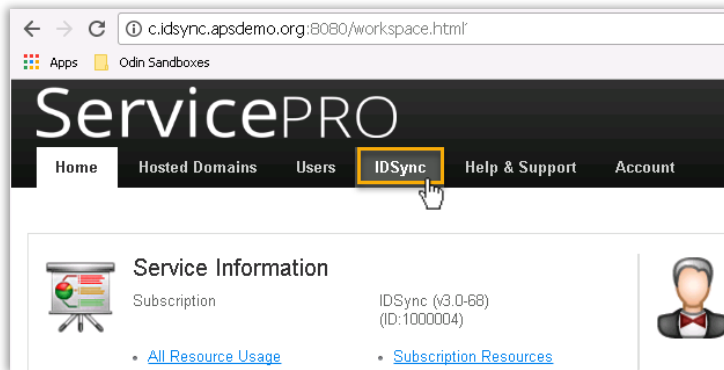


Figure 2.3-4

- Click on the [Configuration](#) button (figure 2.3-5).

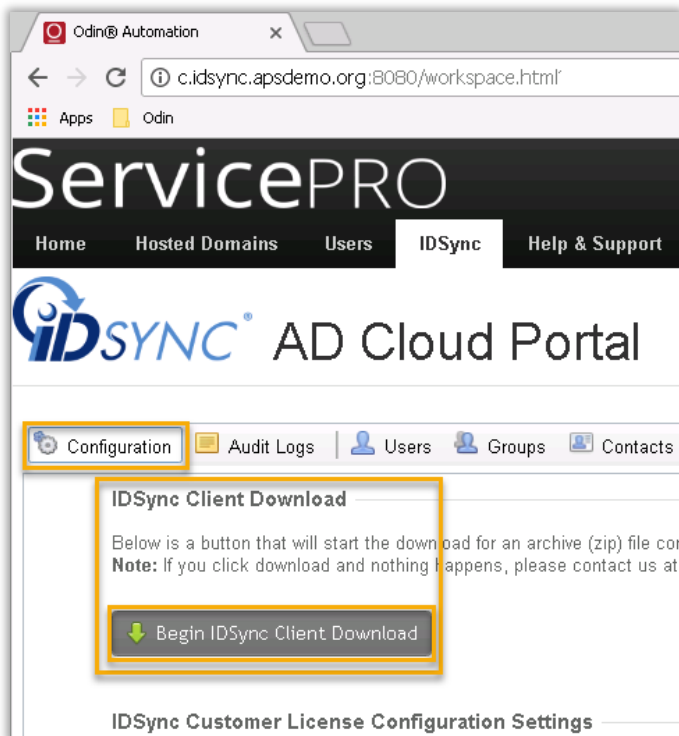


Figure 2.3-5

From this screen, the first two sections (the software Download and the Client Configuration) will be needed:

- Click on the [Begin IDSync Client Download](#) button to download the software that will be installed in your customer's network.
- Once downloaded, copy the file to the server where the IDSync® Management software will be installed.

Downloading the IDSync® Management Software

- Then, scroll down and look for the IDSync® Customer License Configuration Settings section (see figure 2.3-6).
- Click on the **Copy Config** button to copy the License Configuration information onto your clipboard.
- And, paste the information into a text file and transfer the file to the server on which you will be installing IDSync® in your customer's environment.

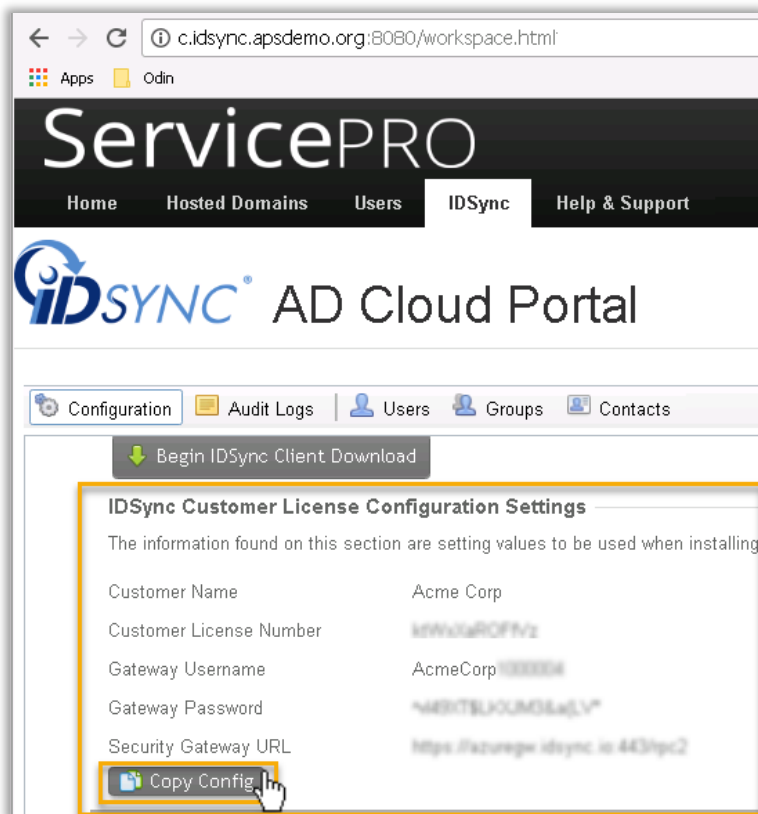


Figure 2.3-6

Installing the IDSync® Management Software

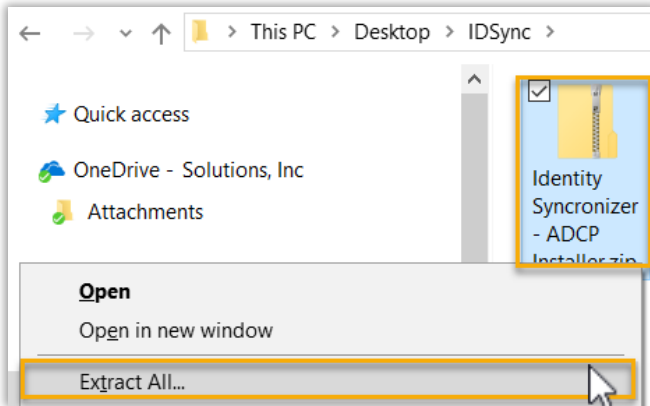


Figure 2.4-1

- Locate the .zip file on the server where IDSync® services will be running, and extract its contents (see figure 2.4-1).

The IDSync® software is developed to run on 32bit or 64bit operating systems, so, both installers should be found in the .zip file, along with documentation related to the system and version that's being installed.

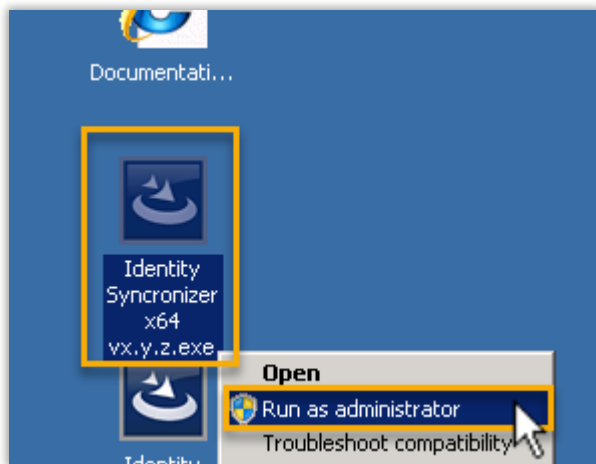


Figure 2.4-2

- Choose the installer according to your operating system (x64 for a 64bit OS or x86 for a 32bit OS) .
- And Run it as administrator (see figure 2.4-2).

If not present, the installer will ask for the Microsoft .NET Framework 4.6 to be installed:

- Click the "Install" button to start installing the .NET Framework, as shown in figure 2.4-3.

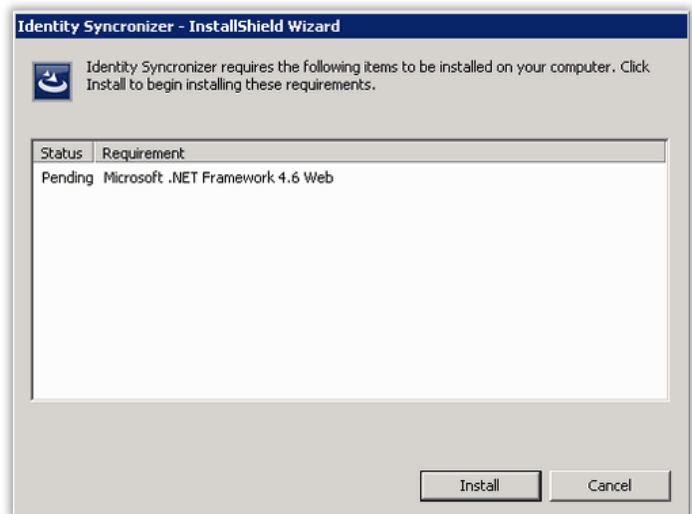


Figure 2.4-3

Installing the IDSync® Management Software

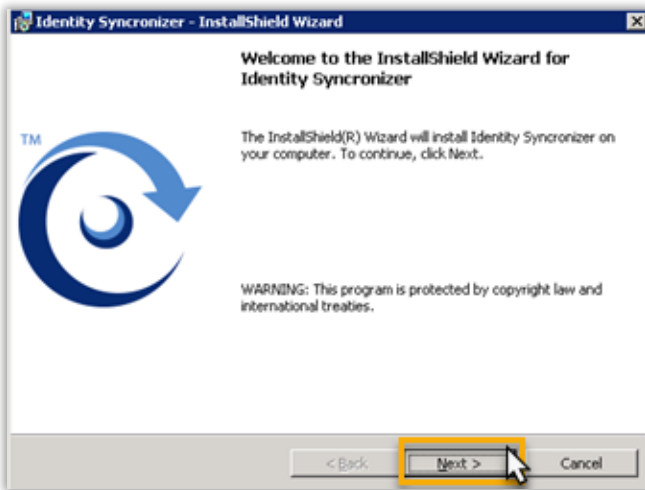


Figure 2.4-4

- Click on the **Next** button (figure 2.4-4).

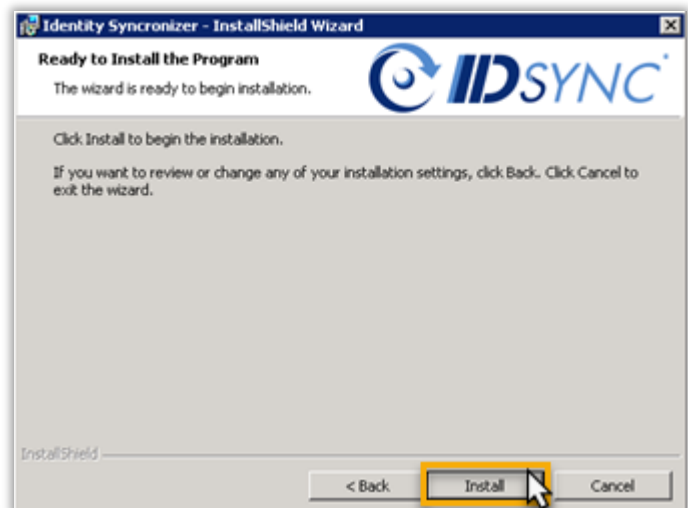


Figure 2.4-5

- Click on the **Install** button to continue the installation process (figure 2.4-5).

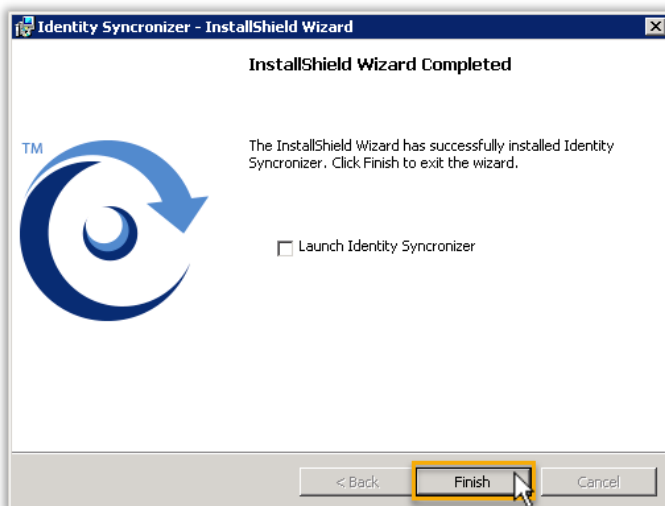


Figure 2.4-6

- Then, click on **Finish** to close the installer.

Configuring the IDSync® Management Software

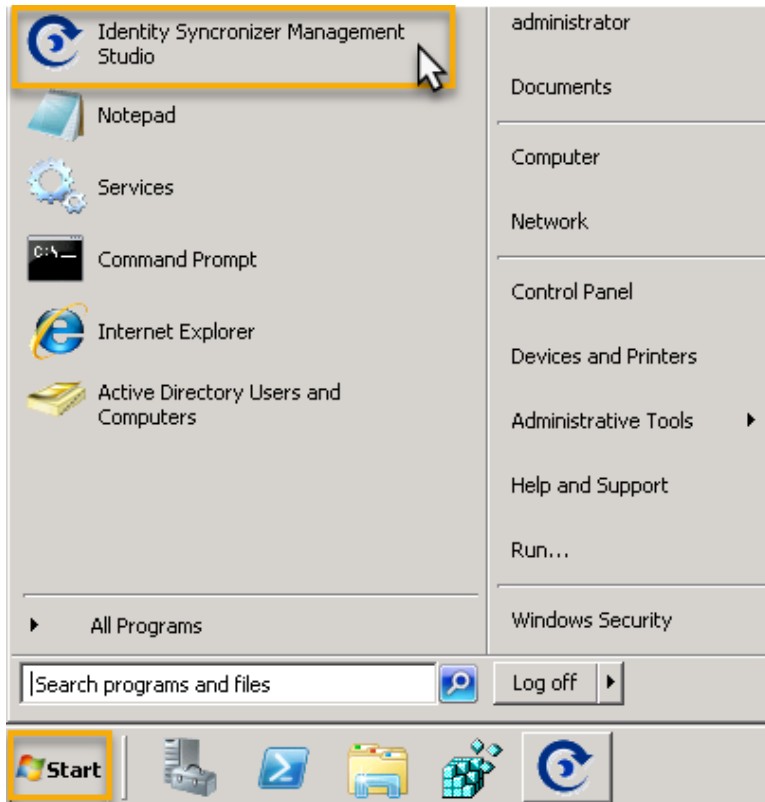


Figure 2.5-1

- Once the installation is complete open the “Identity Synchronizer® Management Studio” from the start menu (see figure 2.5-1).

Configuring the SQL Database

When the Identity Synchronizer® Management Studio is run for the first time, the database connection settings need to be specified.

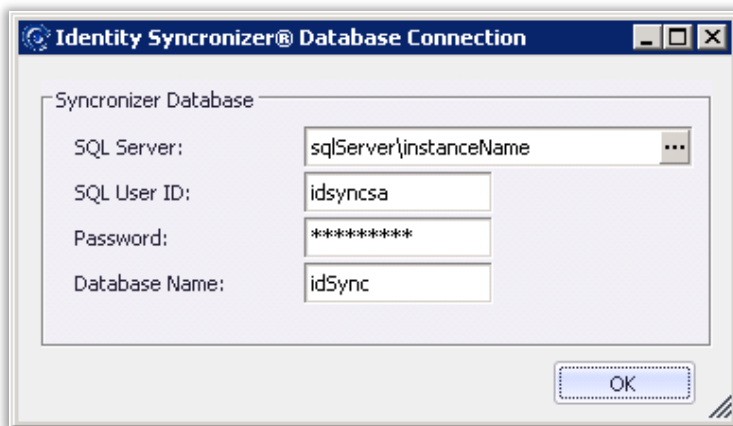


Figure 2.5.1-1

- Enter the necessary SQL Server information in the ‘Database Connection’ dialog box (see figure 2.5.1-1).

Configuring the SQL Database

- Once the SQL connection data has been entered click on the ellipses (...) button to test the connection.
- If the connection is successful click the "OK" button to continue (see figure 2.5.1-2).

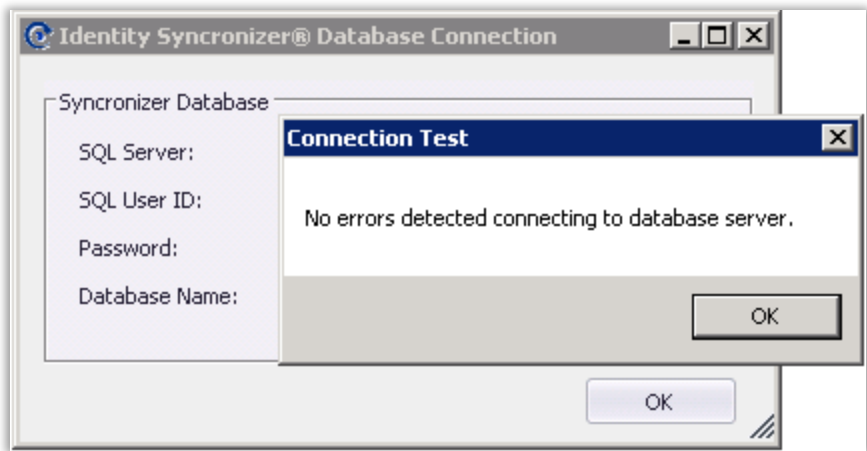


Figure 2.5.1-2

Troubleshooting the Database Connection

If an error message is shown when testing the connection to the database, please, make sure that these requirements are met in the SQL Server settings:

- Mixed-mode authentication needs to be enabled, since the Identity Synchronizer® uses a SQL Server user name and password combination (figure 2.5.1-3).

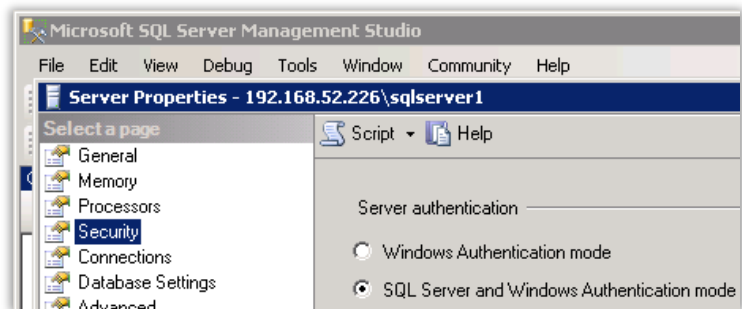
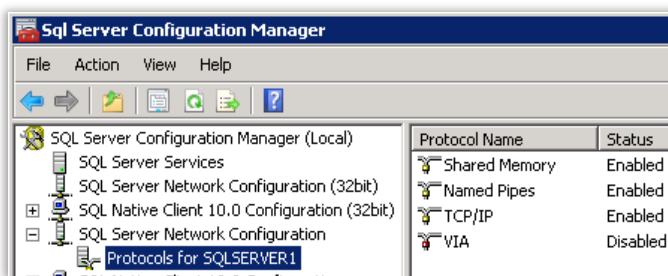


Figure 2.5.1-3

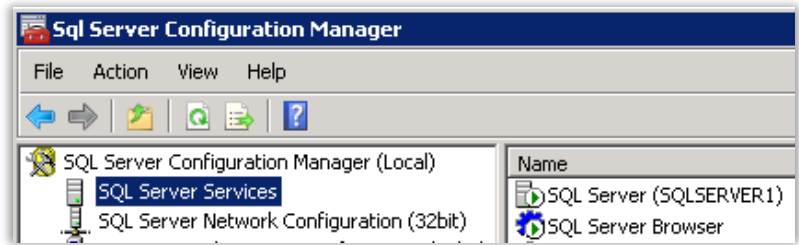


- TCP/IP and Named Pipes protocols need to be enabled (figure 2.5.1-4).

Figure 2.5.1-4

Troubleshooting the Database Connection

- The SQL Server User ID needs to have permissions to create databases (sysadmin rights) on the SQL server (figure 2.5.1-5).

*Figure 2.5.1-5*

Configuring IDSync® for Market Place communication

Once the database has been configured, the Identity Synchronizer® Management Studio will open.

The next step is to configure the Identity Synchronizer to communicate with the Ingram Marketplace or with another Odin-based Market Place.

- To do so, click on the "Odin" tab and a screen as shown in Figure 2.5.2-1 should display.

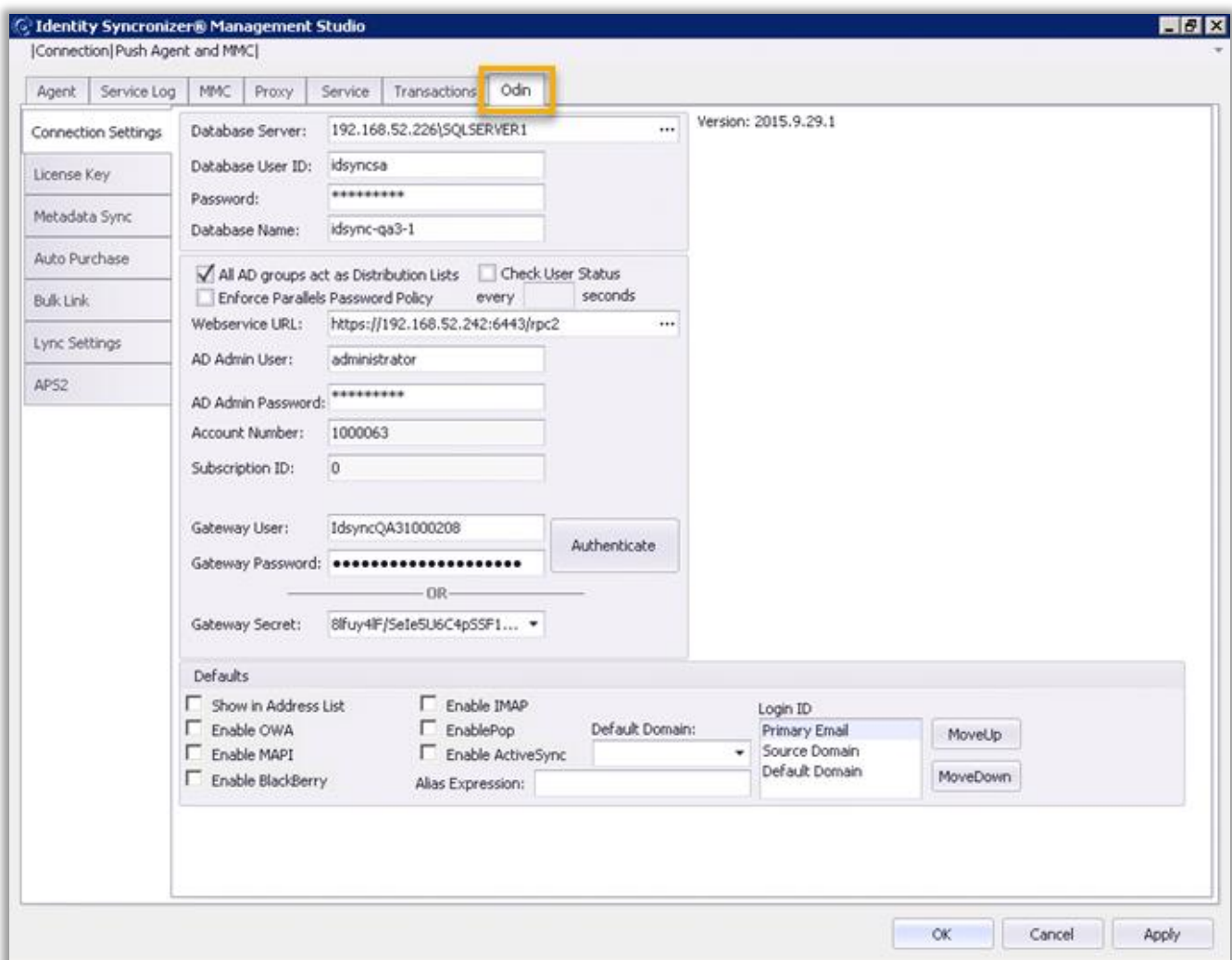


Figure 2.5.2-1

Configuring IDSync® for Market Place communication



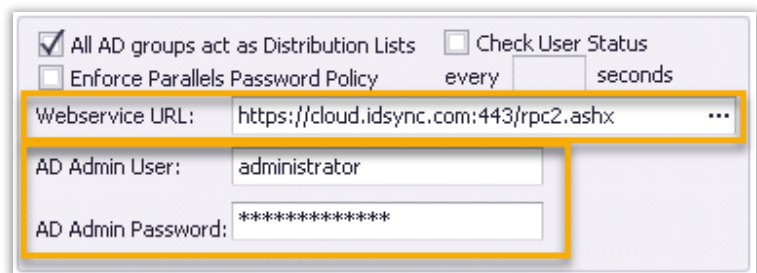
Database Server: 192.168.52.226\SQLSERVER1
Database User ID: idsyncsa
Password: *****
Database Name: idsync-qa3-1

Figure 2.5.2-2

The database credentials should already be populated on this screen based upon the database information that you provided in a previous Section of this guide (as shown in figure 2.5.2-2).

Now, you'll need the IDSync® Customer License Configuration Settings (this information comes from the Odin's Control Panel, previously copied and pasted to a text file).

- In the Webservice URL field (see figure 2.5.2-3), enter the 'Security Gateway URL' that you obtained from the customer control panel in ODIN.
- In the AD Admin User field provide a dedicated username of an AD Domain Admin within the customer's Active Directory.



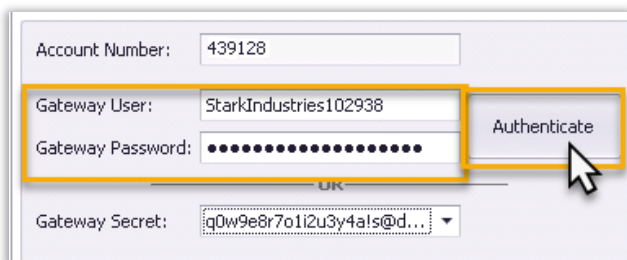
All AD groups act as Distribution Lists Check User Status
 Enforce Parallels Password Policy every [] seconds
Webservice URL: https://cloud.idsync.com:443/rpc2.ashx
AD Admin User: administrator
AD Admin Password: *****

Figure 2.5.2-3

This account will be used for all of the management functions that the AD Control Panel performs. Therefore, it is important that this account be dedicated to this task and that the account/password be set to non-expiring.

- Enter the AD Admin Password for the AD Domain Admin.

Next, the IDSync Service needs credentials for communicating with the Ingram Customer Control Panel (refer to figure 2.5.2-4):



Account Number: 439128
Gateway User: StarkIndustries102938
Gateway Password: *****
Authenticate
Gateway Secret: q0w9e8r7o1i2u3y4a!s@d...

Figure 2.5.2-4

- Enter the Gateway User and the Gateway Password that were stored in the text file that you created in a previous section of this guide.
- Then click on the Authenticate button.

Configuring IDSync® for Market Place communication

Once the Authentication is successfully accomplished, the Gateway Secret and the Account Number fields will be automatically populated.

No other fields on the Connection Setting tab are required for AD Cloud Portal use. The other fields and options are specific to other Identity Synchronizer® solutions.

Entering the License Information

After the ODIN configuration information has been entered, IDSync requires that the license key information be stored.

- To enter the license key information, click on the **License Key** tab as shown in figure 2.5.3-1.
- Then enter the **License Code** (aka the Customer License Number) and the **Customer** (aka the Customer Name) as stored in the text file that you created previously.
- Click **Apply** to save the settings that you have entered.

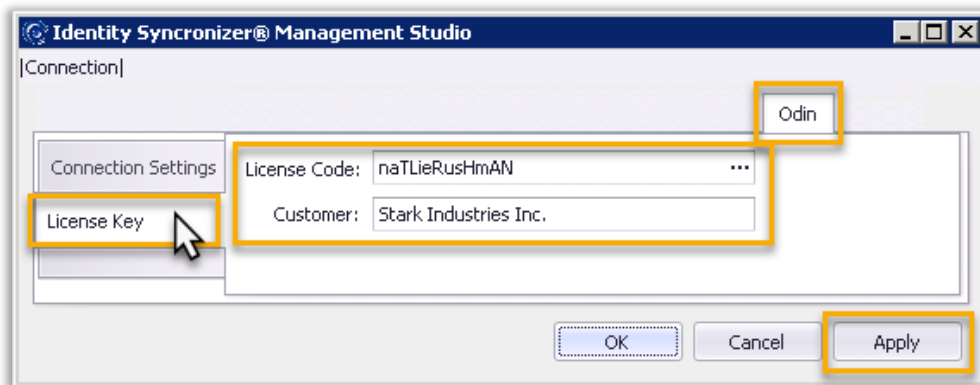


Figure 2.5.3-1

Installing the IDSync® Services

The next step is to install the IDSync Services.

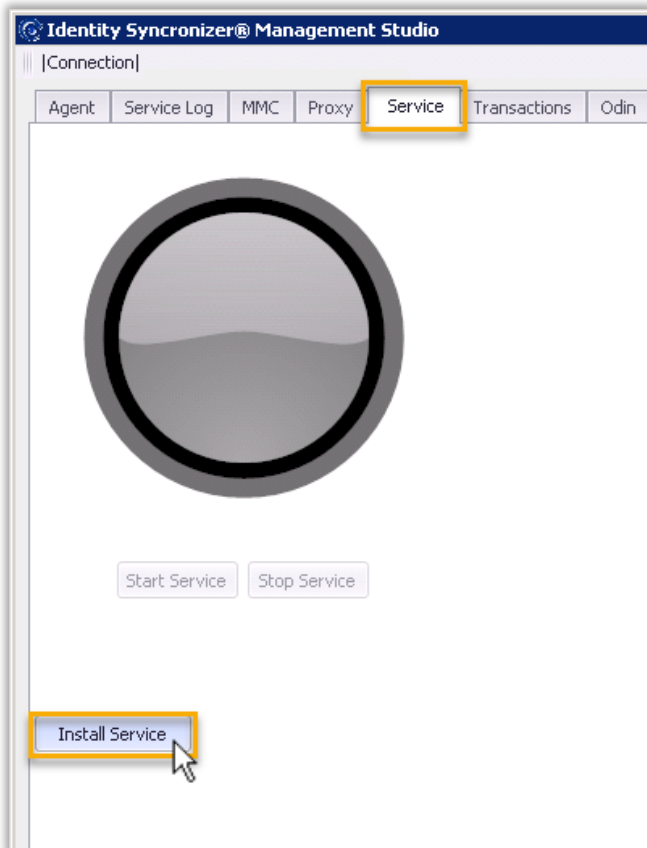


Figure 2.5.4-1

- To do so, click on the “Service” tab in the Identity Synchronizer® Management Studio (see figure 2.5.4-1).
- Then click on the button labeled “Install Service”.

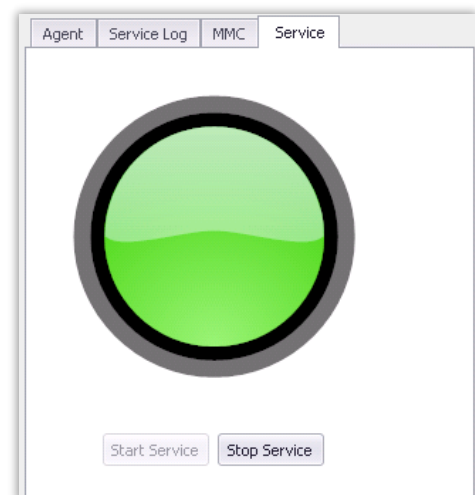


Figure 2.5.4-2

- ☞ After the services have been installed, the services will start, and the grey circle will change to green indicating that the services are operational (see figure 2.5.4-2).

Congratulations. Your IDSync System is now installed.!

Next Steps

Upon the first installation of IDSync® in a customer's environment, IDSync® must download information regarding the Customer's Subscription. This download only occurs once and is only required right after the initial start of the IDSync® Services, and it should take 5 to 10 minutes.

You do not have to take any action to cause this initial download to occur. It will run in background and nothing additional will display on the Identity Synchronizer® Management Studio. However, you should be aware that it may prevent you from immediately being able to use the IDSync® AD Control Panel during the initial download.

To confirm that the required information was correctly downloaded:

- Click on the **Odin** tab.
- Then, click on the **Features** tab (at the left of the application).
- A list of valid **Subscriptions** will be available in the drop-down list (see figure 2.5.4-3).

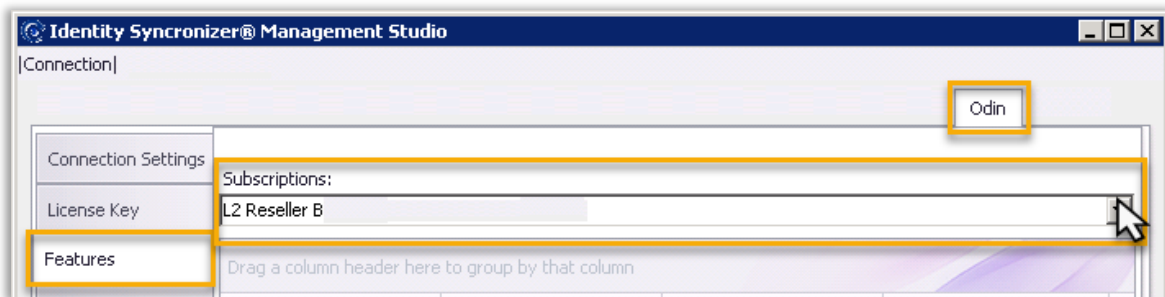


Figure 2.5.4-3

Once the download is complete, you will be able to start using the Security Studio to configure the proper users and access levels. See detailed information about the Security Studio in the AD Cloud Portal Management Guide.