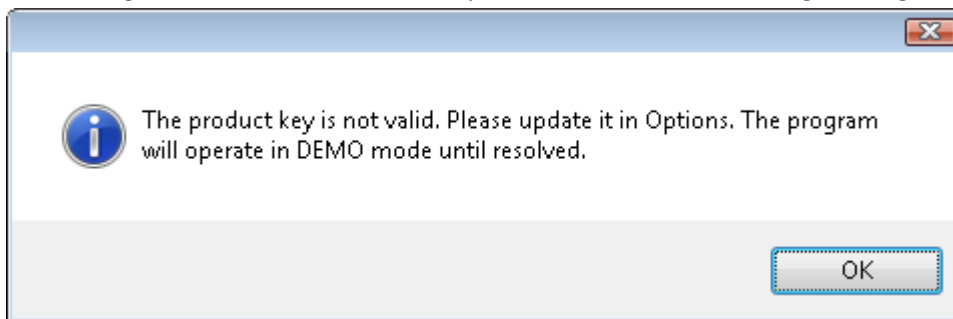


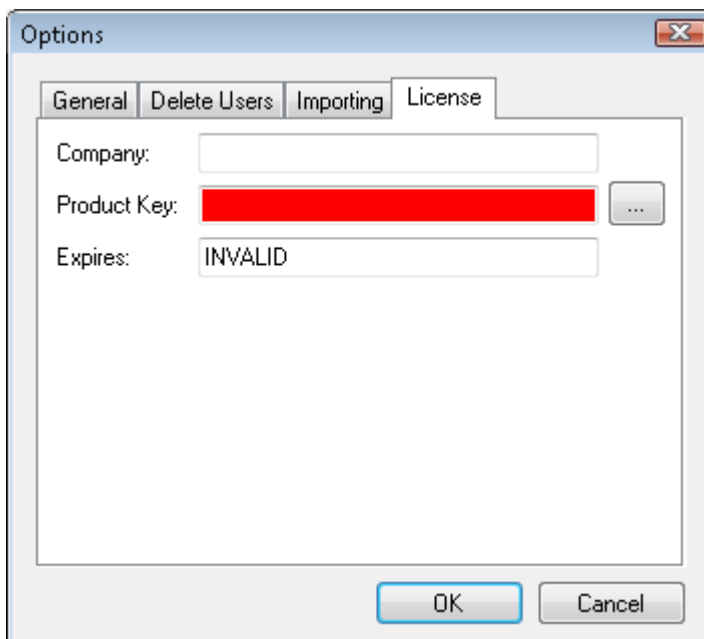
This guide is designed for those that would like to get ActivMan up-and-running quickly. It contains step-by-step procedures for performing the most common tasks when first starting out using the application.

1. Installing and Launching ActivMan (main application)

- a) For any edition of ActivMan, you must install the main application. Install the main application in a desired location. If you are installing the client-server edition then you will need to install this to the same folder.
- b) On running ActivMan for the first time you will receive the following message:

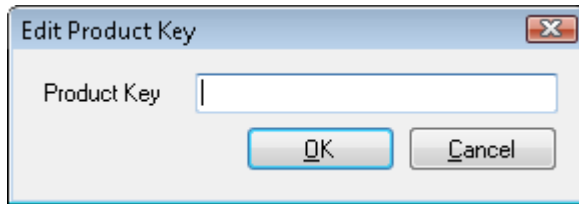


- c) Click 'OK' and the main window will appear.
- d) To enter your valid product key select 'Options' from the 'Edit' menu.
- e) Select the 'License' tab.

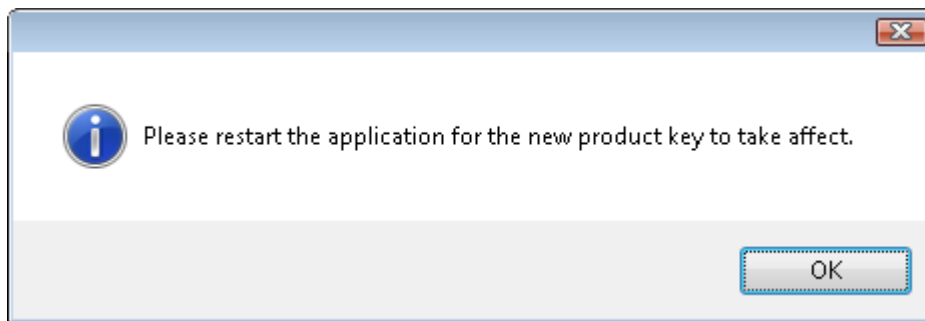


- f) Enter the company name you used to register ActivMan.

- g) Click '...' button and enter your product key.



- h) Once entered click 'OK'.
i) If the product key is valid you will receive the following message:

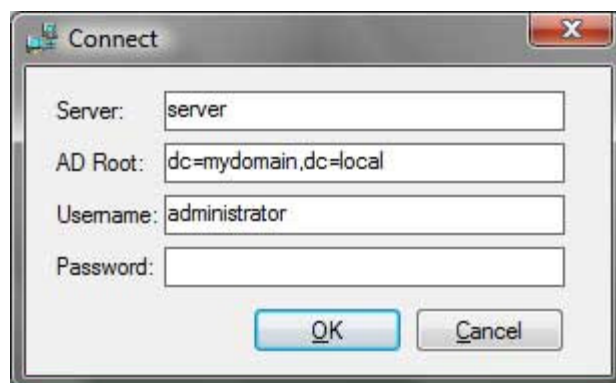


If the product key is invalid the product key box will appear red and the expires box will state "INVALID".

- j) Click 'OK' on the message box.
k) Click 'OK' on the options dialog.
l) Restart the application for the product key to take effect.

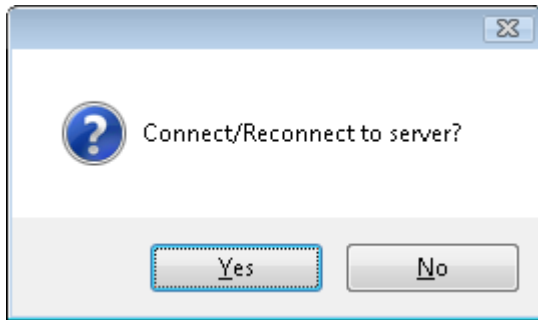
2. Connecting to your Active Directory server/domain

- a) Either:
- Select 'Servers' from the list on the left and right click in the Servers list, and click 'New Connection'.
 - Right click 'Servers' from the list on the left and select 'New Server'.
 - Select 'Connection' from the 'New' menu in the 'File' menu.



- b) Enter a domain controller in the 'Server' box.
c) Enter the root of the AD structure to which you would like to start browsing from. For example, you absolute root will be the domain itself, e.g. "dc=mydomain,dc=local". If you wish to have 'Users' as your root then you would enter "cn=users,dc=mydomain,dc=local".
d) Enter the username and password of a user that has access to the AD. This username and password will be used for all AD operations.
e) Click 'OK' when finished.

- f) You will be asked if you would like to connect to this new server. Select 'Yes'.



3. Setting your default Active Directory server

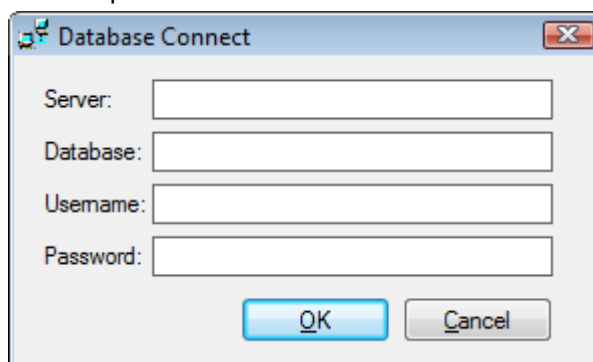
Setting the default server will force the application to connect to this server every time the application loads. To do this, follow these steps:

- a) Select 'Options' from the 'Edit' menu.
- b) On the 'General' tab, select the default server.
- c) If you wish to connect to this server every time the application starts then select 'Yes' for 'Connect to default server on startup'
- d) Click 'OK' for the settings to be saved.

4. Adding your MIS server

Adding your MIS server will allow you to extract data from your MIS in order to create corresponding user accounts. To do this, follow these steps:

- a) Either:
 - i. Select 'Databases' from the list on the left and right click in the Databases list, and click 'New Database'.
 - ii. Right click 'Databases' from the list on the left and select 'New Database'.
 - iii. Select 'Database' from the 'New' menu in the 'File' menu.Select 'Options' from the 'Edit' menu.



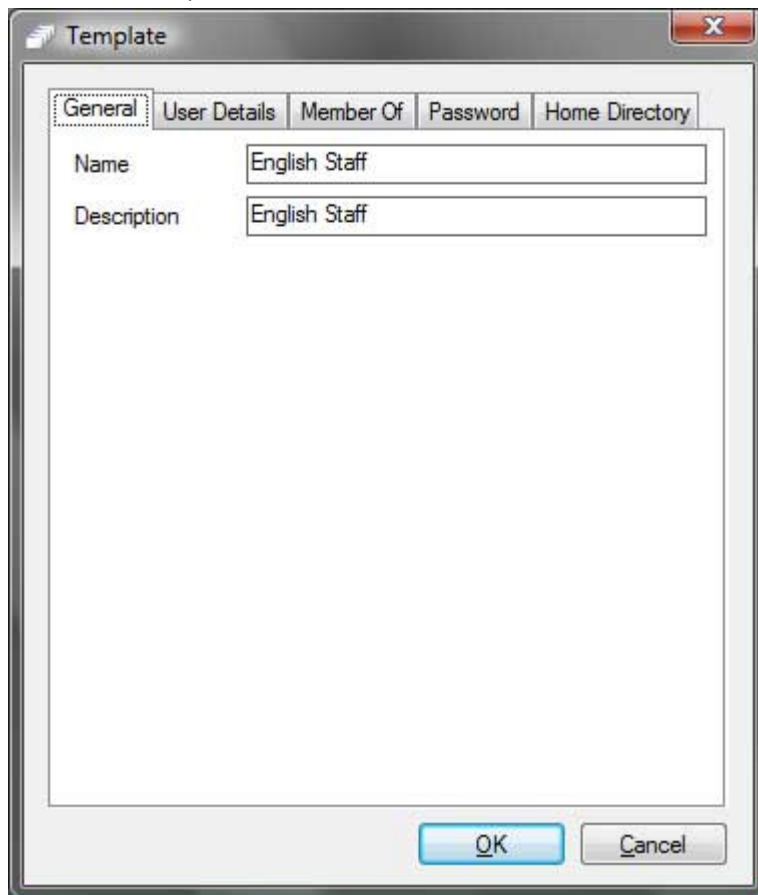
- b) Enter the SQL server name/instance of your MIS server.
- c) Enter the database name.
- d) Enter the SQL username and password in order to connect to the database. If you wish to use Windows Authentication then leave both of these field blank and the current user will be used. The current user is always the current user executing the software at the time.

- e) Click 'OK' to save the new connection.

5. Creating a template

To ease the administration of different types of user, i.e. Year 7 students, office staff, teacher, etc, you ideally need to create a template for each different type of people. These templates will be used to import users from your MIS or create new users manually. To do this, follow these steps:

- a) **Ensure you are connected to a server.**
- b) Either:
 - i. Select 'Templates' from the list on the left and right click in the Templates list, and click 'New Template'.
 - ii. Right click 'Templates' from the list on the left and select 'New Template'.
 - iii. Select 'Template' from the 'New' menu in the 'File' menu.
 - iv. Click 'New Template' from the toolbar.



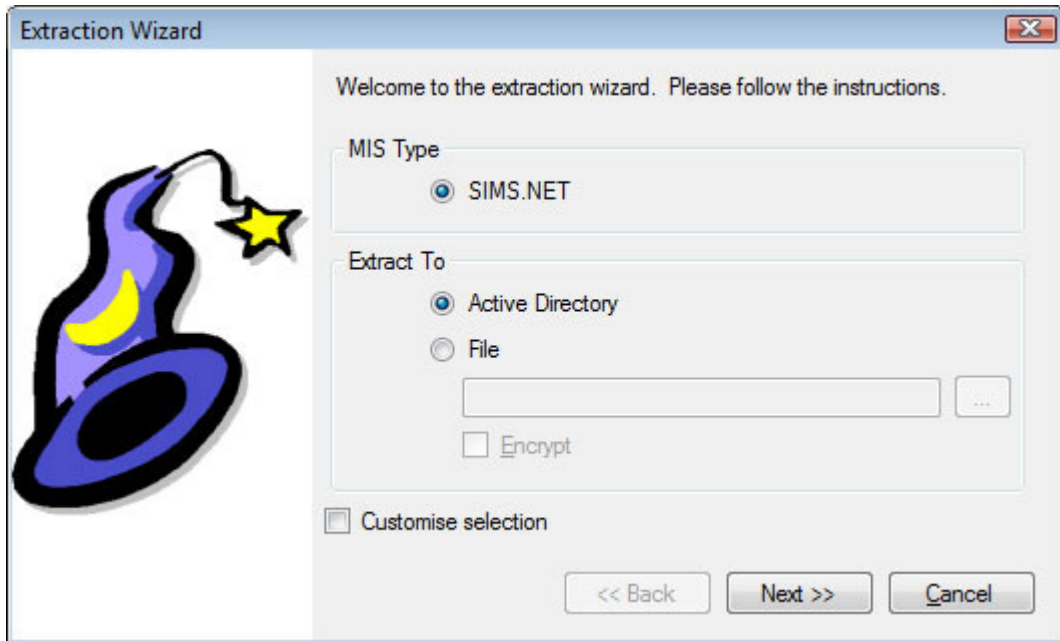
- c) On the 'General' tab, Enter a name and description to indicate to you who this template is for.
- d) Select the 'User Details' tab.
- e) Select a display name format from the drop down list.
- f) Select a username format from the drop down list. If a format does not match your requirements then you select 'Custom' to specify a custom format.

- g) If you have select 'Custom' for username format, enter a prefix and suffix, and select a format. You can select 'Custom' again where you will have to complete the 'Further Customisation' section.
- h) Select a conflict resolution if the username already exists. NOTE: If you are using this template for auto importing then it is highly advisable to select 'Ignore', as duplicate user accounts will be created for the same people every time the AutoImport utility is executed.
- i) Complete all other desired fields of the 'User Details' tab.
- j) Select the 'Member Of' tab and add any desired groups for this type of user.
- k) Select the 'Password' tab.
- l) Specify what the new users' password is going to be. 'Date of Birth' is used when importing users and creating manually. The last option allows you to enter a predefined password that will be common with all users who are created from this template.
- m) Select any desired password options.
- n) Select 'Home Directory' tab.
- o) If you would like a home directory creating for the user then select 'Create Home Directory'.
- p) If selected, enter the server and the root path for the home directory. **NOTE: the root path MUST be how the server sees it**, i.e. "C:\Users" and not "\\server\users" or "C\$\Users".
- q) You can specify whether to add the created user to the permissions of the created home directory. Any inheritable permissions will be propagated.
- r) You can also specify any additional permissions by clicking 'Permissions'.
- s) If you would like a share creating for the created home directory for the user then select 'Create Share from Home Directory'.
- t) If selected, select the format of the share.
- u) Enter a share description.
- v) Select how many users can access the share for 'Max Users'.
- w) You can specify whether to add the created user to the permissions of the created share.
- x) You can also specify any additional permissions by clicking 'Permissions'.
- y) If you would like the created home directory to be added to the user account then select 'Add directory to user account' and select and specify a drive letter (optional).
- z) Click 'OK' and enter a filename for this template.

6. Importing users from your MIS using the Extract Wizard

Firstly, ensure you have already created a connection to your MIS system and have at least one template before proceeding.

- a) Select the 'File' menu, then 'Extract...'



- b) Select the MIS type. Currently only SIMS.NET is supported.
- c) Select 'Active Directory' in the 'Extract To' box.
- d) If you would like to select which users to extract then select 'Customise Selection'.
- e) Click 'Next'.
- f) Select the OU to extract the users to.
- g) Select the database you would like to extract users from and click 'Next'.
- h) Select which year you would like to extract, i.e. 'Year 7', and click 'Next'
- i) If you select 'Admissions' for the year then you will need to select the admissions group and click 'Next'.
- j) Select the template you would like to use for the extracted users
- k) The users will now be extracted using the criteria you have selected.
- l) If you have selected 'Customise Selection' then, from the list, select which users to extract and click 'Finish' to import the users.
- m) Alternatively, all the extracted users will be imported into Active Directory using the options you have selected.

7. Importing users from your MIS using AutoImport

ActivMan AutoImport is a program which can be scheduled to automatically extract specified users from your MIS and imported into your Active Directory. This would then remove the need to manually perform the operation every time a new user arrives or an old user leaves. To do this, follow these steps:

- a) Either:
- i. From ActivMan, select 'AutoImport' from the 'Tools' menu.
 - ii. From the Start menu, select 'Configure' from the AutoImport submenu of the ActivMan menu group.
- f) On the 'MIS' tab, enter the SQL server name/instance of your MIS server.
- g) Enter the database name.

- h) Enter the SQL username and password in order to connect to the database. If you wish to use Windows Authentication then leave both of these field blank and the current user will be used. The current user is always the current user executing the software at the time.
- b) Select the type of MIS you are connecting to.
- c) Select the 'Extract' tab.
- d) Select the years and/or staff that you wish to extract from your MIS. If your MIS supports 'Admissions' then you can specify this too by selecting "[Admissions]" and clicking 'Select Admissions'.
- e) Select the 'Settings' tab.
- f) You now need to enter each year that you wish to create accounts for, i.e. Year 7, Year 8, etc.
 - i. Click 'Add'
 - ii. Select the year to be imported.
 - iii. Select a template to be associated with this year. This template must be created from the main ActivMan application. NOTE: Each year can use the same template if necessary.
 - iv. Select the Active Directory server from the list that this account will be created on.
 - v. Browse for a desired OU on the specified server where these accounts will be created.
 - vi. Click 'OK' to save the year.
- g) Repeat this process for all the years you are going to import.
- h) Select the 'Options' tab and specify any desired settings.
- i) Click 'Apply' to save the settings.
- j) On successfully connecting to the server you are now ready to go. You can either 'Run Now' or schedule this program to run at a future time.

8. Scheduling AutoImport

To schedule the AutoImport application to run at any time you wish by create a standard Windows scheduled task (this will vary depending on the operating system):

- a) Open Windows Scheduler
- b) Create a new task
- c) Select the ActivMan AutoImport executable
- d) ActivMan AutoImport does not require any additional arguments
- e) Select the desired date/day/time for the schedule to run
- f) Click 'OK' to create the schedule. It will now run at the specified date/time.