

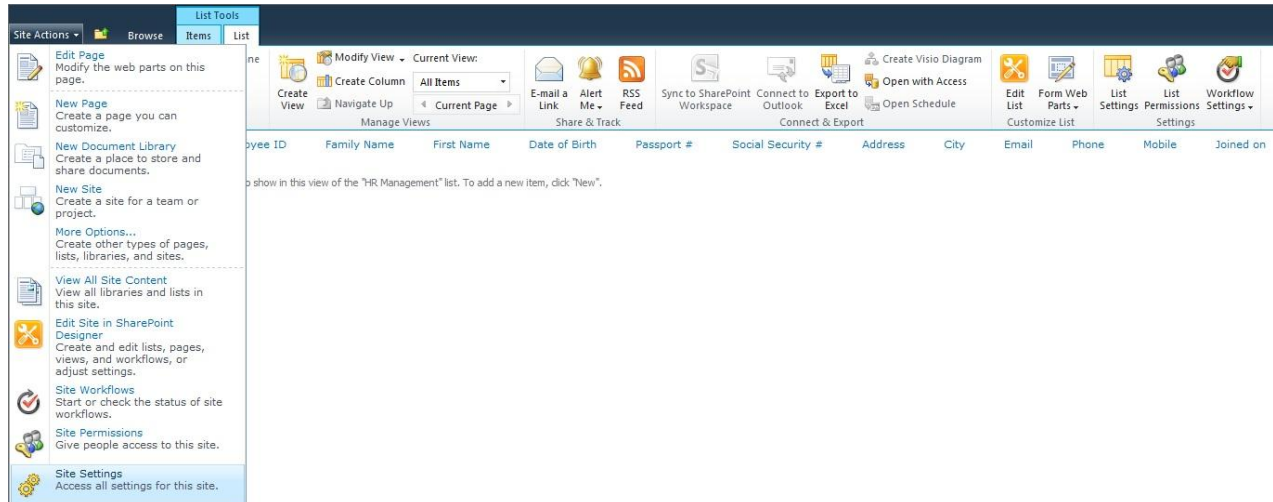
AD Information Sync Tutorial for SP 2010

Please note that AD Information Sync has to be activated before it can be used. For further reference, please see our [Product Installation Guide](#).

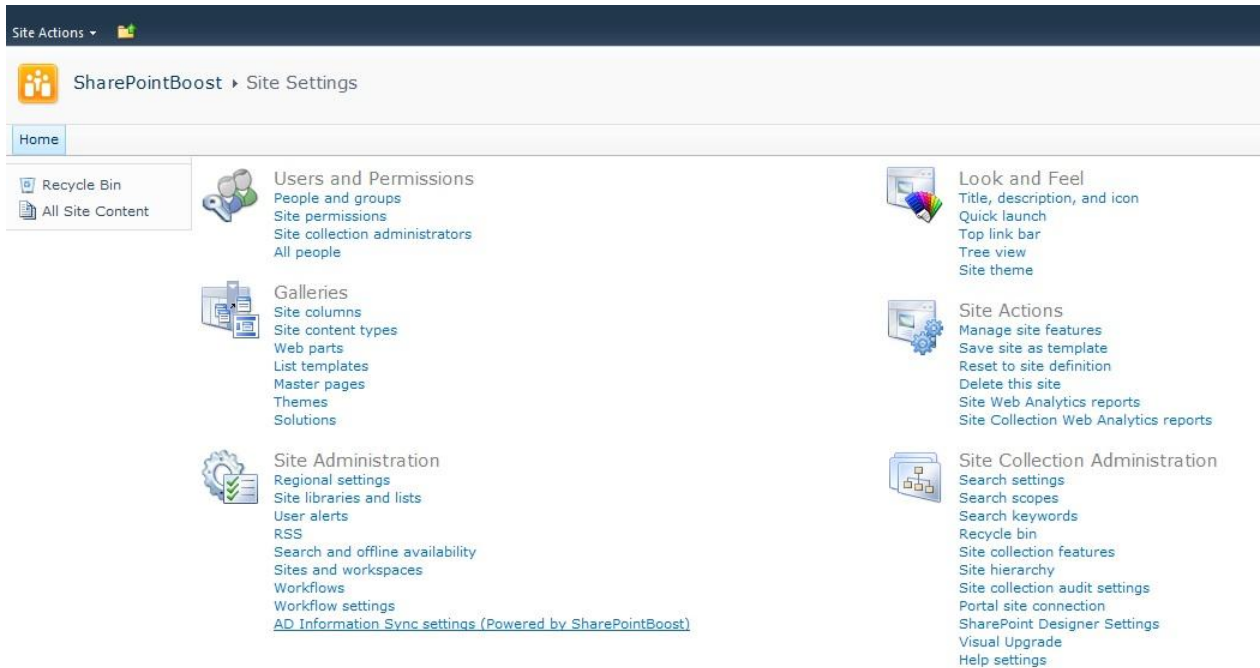
Further information is also available in our [FAQ](#).

AD Information Sync Settings Navigation

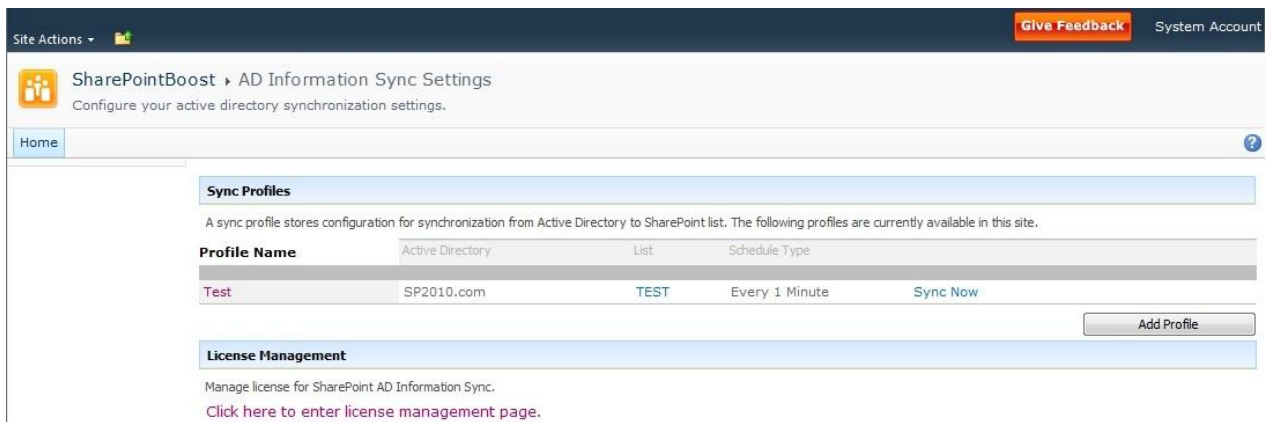
After installation and activation of AD Information Sync, the link to the settings page will be available on the Site Settings of every site in the site collection. To navigate there, please click the "Site Settings" button in the "Site Actions" menu.



In the Site Settings page, the AD Information Sync link is located in the Site Administration settings. This link will direct you to the AD Information Sync main settings page.



Feature Introduction



The Sync Profiles section displays all profiles that have already been created. To display the profile settings page, click on the profile name in the list. Behind each profile a "Sync Now" link will be displayed. Clicking this link will start a manual synchronization between Active Directory and the list specified in this profile.

To add a new profile, click on the "Add Profile" button.

Note: To delete a profile, navigate to the profile settings page. There a "Delete" button will be displayed next to the "OK" and "Cancel" button.

1. Profile Name

Profile Name

Type a name for your profile.

Here the name of the profile will be entered. By this name the profile will be displayed in the AD Information Sync main settings page.

2. AD Information Sync List Selection

List

Select a SharePoint list to synchronize to.

TEST

On the Add Profile page, specify the list which you want to point AD Information Sync to. Note that the drop-down list displays all lists in the current site.

Note: Currently AD Information Sync supports all standard list types, excluding KPI and Business Data lists.

3. Active Directory Section

Active Directory

Specify a domain server and user login credentials. (Make sure the user account you specify has the appropriate permissions to access the domain server.)

Domain Server: (domain name, server name or IP address)

SP2010.com

Get current domain

Username: (domain\username)

administrator

Password:

.....

Test Connection

In the Active Directory section, fill in domain name by clicking the "Get current domain" button, and type the username and password. Please note that this user has to have access rights to the domain server. Then click Test Connection button to check whether the current user is can access with Active Directory, and whether or not the information entered is correct.

Note: You can also input server name or IP address of the AD controller into the Domain Server text box manually.

4. Active Directory Information to Synchronize

Active Directory Information to Synchronize

Select which information you would like to synchronize, and customize the filter string (if appropriate). Check "Sync by Organizational Unit" to only synchronize items in organizational units you specify.

Preset Type:

Filter:

Sync by Organizational Unit

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- Domain Controllers
- MyUsers
- Demo
- Administration
- Marketing
- Product Development
- Quality Assurance

In the Active Directory Info to Sync section, choose what information should be synchronized. This can be filtered information by entering LDAP query sentences. Another option is to filter this information based on Organizational Units selected.

Note: AD Information Sync supports LDAP sentences to set Active Directory sync. If you have no Organizational Units set up, you can sync AD information by default settings or LDAP.

LDAP is the Lightweight Directory Access Protocol. AD Information Sync access and get the Active Directory information through LADP protocol.

5. Sync Options

Sync Options

Specify whether to create or delete list items during synchronization.

Create list items when AD items are created (these items will be added to the list during the next synchronization).

Delete list items when AD items are deleted (these items will be deleted from the list during the next synchronization).

The Sync Options section gives the administrator the option to decide what behavior AD Information Sync will show when there are entries in added to or removed from Active Directory.

For the first time a profile is set up, the checkbox "Create list items when AD items are created" has to be checked. Otherwise the list will not be populated with items from Active Directory.

Note: The "Delete list items when AD items are deleted" might result in data loss, if activated.

6. Column Mapping

List Column	AD Field
Employee ID	(None)
Family Name	(None)
First Name	(None)
Passport #	(None)
Social Security #	(None)
Address	(None)
City	(None)
Email	(None)
Phone	(None)
Mobile	(None)
Duration of Contract	(None)
Position	(None)
Department	(None)
Reporting to	(None)
User	(None)
Comments	(None)

In the **Column Mapping** section, select AD fields to synchronize with the SharePoint list.

Note: The AD Field drop-down list provides about 30 Active Directory properties for **Users** and 11 Active Directory properties for **Computers**.

The content in brackets of AD Field is the common name of Active directory object. It is used in LDAP sentence.

Note: Currently AD Information Sync supports all standard column types excluding Date and Time columns, Lookup columns, Yes/No columns, KPI columns, Calculated columns and Business Data columns. Columns not support will not be displayed in the Column Mapping section of AD Information Sync.

7. Sync Schedule

Sync Schedule

A timer job is running in background to check profiles and synchronize AD information. Set the schedule to indicate how often the job should be performed for this profile.

Note: These settings will only take effect when the AD Information Sync Timer Job has been activated.

Sync manually
 Sync every minutes (1-59)
 Sync hourly
 Sync daily
 Between
 and

In Sync Schedule section, specify the AD sync schedule type.

Note: Sync manually means the Active Directory sync will only be synchronized if the "Sync Now" button has been clicked on the AD Information Sync settings page.

Sync every n minutes specifies at what interval the information will be synchronized between Active Directory and the list, where n represents the number of minutes between each synchronization.

Sync hourly specifies that the information in Active Directory will be automatically synchronized with the list every hour.

Sync daily allows the administrator to specify a period of time for each day during which the synchronization between Active Directory and the list should take place.

8. Exclude Items

Exclude Items

Specify items that will be skipped during synchronization. Use the Common Name (CN) to represent an item here. For users, Common Names are usernames. For computers, Common Names are computer names.

Type each item on a separate line:

Common name is the unique identifier of the object in Active Directory. AD Information Sync uses common name (cn) as the identifier to exclude items.

The items whose common name entered in the textbox will not be synchronized with the list.

Example

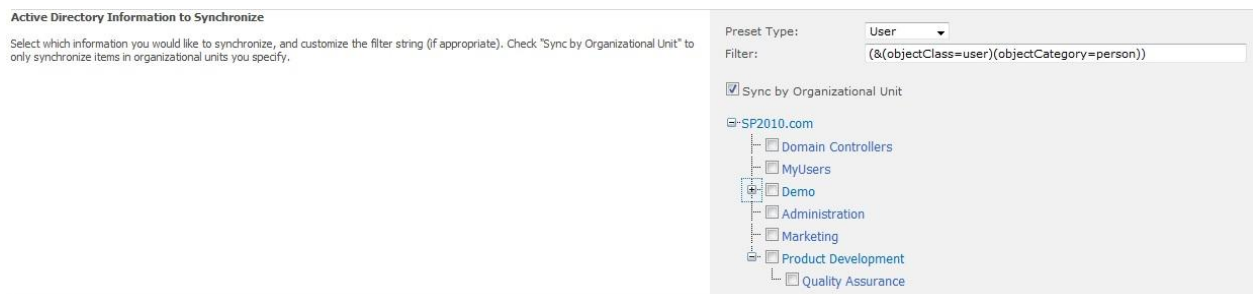
Following the administrator wants to synchronize the information between Active Directory and the HR Management list. In Active Directory all information concerning employees is stored.



To always keep the information in the list up to date, the administrator sets up AD Information Sync to change the list data if information in AD is changing.



Firstly, the basic information has to be set up. The name of the profile is specified as Employee Sync. Then the HR Management list is specified is the list to be synchronized. Also, the Active Directory domain and user login has to be configured.



Then the administrator specifies what information in Active Directory should be synchronized. As all the employees in the company should be synchronized the User type is selected.

The information is organized based on Organizational Units, so the administrator only has to specify the OI's he wants to synchronize, in this case he selects the Administration, Marketing, and Product Development OI, including the Quality Assurance OI.

Sync Options

Specify whether to create or delete list items during synchronization.

- Create list items when AD items are created (these items will be added to the list during the next synchronization).
- Delete list items when AD items are deleted (these items will be deleted from the list during the next synchronization).

To avoid data loss, the administrator only selects to create new list items if new users are created in Active Directory. This will ensure that the list is up to date, but will make sure that the data inside the SharePoint environment is complete.

Column Mapping

Select AD fields to map to SharePoint list columns.

List Column	AD Field
Employee ID	(None)
Family Name	Last Name (sn)
First Name	First Name (givenName)
Passport #	(None)
Social Security #	(None)
Address	Street (streetAddress)
City	City (l)
Email	E-Mail (mail)
Phone	Telephone Number (telephoneNumber)
Mobile	Mobile Phone (mobile)
Duration of Contract	(None)
Position	Title (title)
Department	Department (department)
Reporting to	Manager (manager)
User	Account Name (sAMAccountName)
Comments	(None)

Here the synchronization mapping is set up. The administrator specifies what Active Directory field should be mapped against which column in the AD Management list.

Sync Schedule

A timer job is running in background to check profiles and synchronize AD information. Set the schedule to indicate how often the job should be performed for this profile.

Note: These settings will only take effect when the AD Information Sync Timer Job has been activated.

- Sync manually
 - Sync every minutes (1-59)
 - Sync hourly
 - Sync daily
- Between AM and AM

Following the synchronization schedule needs to be specified. To avoid synchronization during working time, the administrator specifies the synchronization to take place between 12 am and 1 am each day.

As all data concerning employees should be synchronized the administrator does not specify any items to be excluded.

Employee ID	Family Name	First Name	Date of Birth	Passport #	Social Security #	Address	City	Email	Phone	Mobile	Joined on	Duration of Contract	Contract Due Date	On Probation Until	Position	Department	Reporting To	User
(no ID) @HW	Jackson	Rachel				59 Casino Drive	Springfield	Jackson.rachel@testcorp.com	(818) 360-8794	(825) 859-9584					Manager	Administration	Michael Peters	Rachel Jackson
(no ID) @HW	Smith	John				65 Main Street	Springfield	Smith.John@testcorp.com	(812) 187-6671	(822) 710-4960					Assistant	Administration	Rachel Jackson	John Smith
(no ID) @HW	Taylor	Madison				18 Park Boulevard	Springfield	Taylor.Madison@testcorp.com	(814) 211-9067	(299) 351-9966					Assistant	Administration	Rachel Jackson	Madison Taylor
(no ID) @HW	Peters	Michael				19 Greenville Terrace	Springfield	Peters.Michael@testcorp.com	(813) 279-0717	(823) 356-3186					Owner	General Manager		Michael Peters
(no ID) @HW	Brown	Catherine				69 Times Square	Springfield	Brown.Catherine@testcorp.com	(812) 517-3257	(824) 216-4025					Manager	Marketing	Michael Peters	Catherine Brown
(no ID) @HW	Anderson	Peter				60 Garden Road	Springfield	Anderson.Peter@testcorp.com	(813) 124-8850	(825) 283-8381					Assistant	Marketing	Catherine Brown	Peter Anderson
(no ID) @HW	Garcia	Isabella				35 Main Street	Springfield	Garcia.Isabella@testcorp.com	(815) 289-9211	(822) 761-7310					Assistant	Marketing	Catherine Brown	Isabella Garcia
(no ID) @HW	Jackson	Mary				72 Station Square	Springfield	Jackson.Mary@testcorp.com	(811) 242-4900	(823) 370-3055					Sales Associate	Marketing	Catherine Brown	Mary Jackson
(no ID) @HW	Smith	Jennifer				59 University Drive	Springfield	Smith.Jennifer@testcorp.com	(815) 250-1616	(824) 492-8849					Sales Associate	Marketing	Catherine Brown	Jennifer Smith
(no ID) @HW	Davis	Ashley				4 Kennedy Drive	Springfield	Davis.Ashley@testcorp.com	(815) 593-8646	(824) 595-3228					Quality Assurance Analyst	Production/Development	James White	Ashley Davis
(no ID) @HW	Johnson	Mary				9 Park Avenue	Springfield	Johnson.Mary@testcorp.com	(815) 420-6327	(824) 588-1958					Quality Assurance Analyst	Production/Development	James White	Mary Johnson
(no ID) @HW	White	James				14 Park Boulevard	Springfield	White.James@testcorp.com	(815) 271-3396	(825) 402-4791					Manager	Production/Development	Michael Peters	James White
(no ID) @HW	Lopez	Daniel				12 Springfield Boulevard	Springfield	Lopez.Daniel@testcorp.com	(811) 589-8667	(824) 592-9435					Project Manager	Production/Development	Michael Peters	Daniel Lopez
(no ID) @HW	Turner	Clare				74 Main Street	Springfield	Turner.Clare@testcorp.com	(815) 834-8301	(822) 683-4227					Developer	Production/Development	Daniel Lopez	Clare Turner
(no ID) @HW	Lee	Kevin				60 Casino Drive	Springfield	Lee.Kevin@testcorp.com	(812) 206-9647	(824) 594-0288					Developer	Production/Development	Daniel Lopez	Kevin Lee
(no ID) @HW	Phillips	Angela				59 Museum Road	Springfield	Phillips.Angela@testcorp.com	(811) 402-1032	(823) 151-1075					Developer	Production/Development	Daniel Lopez	Angela Phillips
(no ID) @HW	Levin	Susan				70 Lake Road	Springfield	Levin.Susan@testcorp.com	(812) 408-8308	(824) 505-8711					Developer	Production/Development	Daniel Lopez	Susan Levin
(no ID) @HW	Rodriguez	Anthony				17 Park Avenue	Springfield	Rodriguez.Anthony@testcorp.com	(812) 831-1370	(822) 491-1826					Developer	Production/Development	Daniel Lopez	Anthony Rodriguez

After synchronization most columns are filled automatically and will stay up to date based on the synchronization schedule.

Employee ID	Family Name	First Name	Date of Birth	Passport #	Social Security #	Address	City	Email	Phone	Mobile	Joined on	Duration of Contract	Contract Due Date	On Probation Until	Position	Department	Reporting To	User
36102884003 @HW	Jackson	Rachel	7/7/1963	12180797	308-78-1766	59 Casino Drive	Springfield	Jackson.rachel@testcorp.com	(819) 560-8794	(825) 859-9584	6/1/2008	60	6/1/2013		Manager	Administration	Michael Peters	Rachel Jackson
53010784024 @HW	Smith	John	12/11/1964	12139409	480-04-3293	65 Main Street	Springfield	Smith.John@testcorp.com	(812) 187-6671	(822) 710-4960	7/1/2008	36	7/1/2011	10/1/2008	Assistant	Administration	Rachel Jackson	John Smith
74010884007 @HW	Taylor	Madison	8/5/1967	12143883	305-68-0545	18 Park Boulevard	Springfield	Taylor.Madison@testcorp.com	(814) 211-9067	(824) 351-9966	8/1/2008	36	8/1/2011	11/1/2008	Assistant	Administration	Rachel Jackson	Madison Taylor
94010884001 @HW	Peters	Michael	8/21/1960	12109390	260-63-0983	19 Greenville Terrace	Springfield	Peters.Michael@testcorp.com	(812) 279-0717	(823) 356-3186	6/1/2008				Owner	General Manager		Michael Peters
81010874005 @HW	Brown	Catherine	1/20/1965	12120905	076-50-0789	69 Times Square	Springfield	Brown.Catherine@testcorp.com	(812) 517-3257	(814) 216-4025	6/15/2008	60	6/15/2013		Manager	Marketing	Michael Peters	Catherine Brown
46010784006 @HW	Anderson	Peter	5/11/1967	12102908	680-88-8856	60 Garden Road	Springfield	Anderson.Peter@testcorp.com	(813) 124-8850	(825) 283-8381	7/1/2008	36	7/1/2011	10/1/2008	Assistant	Marketing	Catherine Brown	Peter Anderson
02010884008 @HW	Garcia	Isabella	5/18/1968	12149274	764-68-6984	35 Main Street	Springfield	Garcia.Isabella@testcorp.com	(815) 289-9211	(822) 761-7310	8/1/2008	36	8/1/2011	11/1/2008	Assistant	Marketing	Catherine Brown	Isabella Garcia
24010884009 @HW	Jackson	Mary	10/5/1968	12143765	828-68-8285	72 Station Square	Springfield	Jackson.Mary@testcorp.com	(811) 242-4900	(823) 370-3055	1/1/2009	36	1/1/2012	4/1/2009	Sales Associate	Marketing	Catherine Brown	Mary Jackson
52010884010 @HW	Smith	Jennifer	12/8/1973	12190135	383-70-6668	59 University Drive	Springfield	Smith.Jennifer@testcorp.com	(815) 250-1616	(824) 492-8849	6/1/2009	36	6/1/2012	9/1/2009	Sales Associate	Marketing	Catherine Brown	Jennifer Smith
04010884019 @HW	Davis	Ashley	10/14/1984	12180938	422-60-7840	4 Kennedy Drive	Springfield	Davis.Ashley@testcorp.com	(815) 593-8646	(824) 595-3228	1/1/2009	36	1/1/2012	4/1/2009	Quality Assurance Analyst	Production/Development	James White	Ashley Davis
34010784018 @HW	Johnson	Mary	6/8/1984	12120739	431-72-4648	9 Park Avenue	Springfield	Johnson.Mary@testcorp.com	(815) 420-6327	(824) 588-1958	7/1/2008	36	7/1/2011	10/1/2008	Quality Assurance Analyst	Production/Development	James White	Mary Johnson
90010884011 @HW	White	James	5/26/1974	12109882	452-30-8128	14 Park Boulevard	Springfield	White.James@testcorp.com	(815) 271-3396	(825) 402-4791	6/1/2008				Manager	Production/Development	Michael Peters	James White
07010784012 @HW	Lopez	Daniel	3/30/1977	12109126	536-21-4763	12 Springfield Boulevard	Springfield	Lopez.Daniel@testcorp.com	(811) 589-8667	(824) 592-9435	7/1/2008	36	7/1/2011	10/1/2008	Project Manager	Production/Development	James White	Daniel Lopez
70010884014 @HW	Turner	Clare	7/28/1978	12125404	618-38-5574	74 Main Street	Springfield	Turner.Clare@testcorp.com	(815) 834-8301	(822) 683-4227	8/1/2008	36	8/1/2011	11/1/2008	Developer	Production/Development	Daniel Lopez	Clare Turner
05010884016 @HW	Lee	Kevin	2/23/1983	12186079	008-68-1919	60 Casino Drive	Springfield	Lee.Kevin@testcorp.com	(812) 206-9647	(824) 594-0288	1/1/2009	36	1/1/2012	4/1/2009	Developer	Production/Development	Daniel Lopez	Kevin Lee
94010884013 @HW	Phillips	Angela	11/20/1977	12180278	006-42-9287	59 Museum Road	Springfield	Phillips.Angela@testcorp.com	(811) 402-1032	(823) 151-1075	7/1/2008	36	7/1/2011	10/1/2008	Developer	Production/Development	Daniel Lopez	Angela Phillips
06010884017 @HW	Levin	Susan	11/30/1983	12126092	530-95-7093	70 Lake Road	Springfield	Levin.Susan@testcorp.com	(812) 408-8308	(824) 505-8711	6/1/2009	36	6/1/2012	9/1/2009	Developer	Production/Development	Daniel Lopez	Susan Levin
84010884015 @HW	Rodriguez	Anthony	1/17/1982	12193028	632-01-1179	17 Park Avenue	Springfield	Rodriguez.Anthony@testcorp.com	(812) 831-1370	(822) 491-1826	8/1/2008	36	8/1/2011	11/1/2008	Developer	Production/Development	Daniel Lopez	Anthony Rodriguez

After adding a bit more information, the list is complete and ready to use. It will stay be synchronized every day, so all changes in Active Directory will be reflected in the list, thus reducing the workload of the stuff maintaining the list.