



Chancery SMS®

Version 5.4 or Higher

Active Directory Integration Guide

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OVERVIEW

This document provides instructions for configuring the Microsoft Windows[®] Active Directory service for use with Chancery SMS[®] 5.4 or higher.

Note that Microsoft Active Directory configuration procedures differ for new and existing customers. For instructions on configuring Microsoft Active Directory service with Chancery SMS, refer to the table below.

If you are:	Go to this section of the document:
A new customer installing Chancery SMS 5.4 or higher.	Follow the step-by-step instructions starting with “Setting up Microsoft Active Directory - New Customers” on page 5.
An existing customer upgrading to Chancery SMS 5.4 or higher who has not yet integrated Microsoft Active Directory with Chancery SMS.	Follow the step-by-step instructions starting with “Setting up Microsoft Active Directory - Existing Customers (Not Integrated)” on page 21.
An existing customer upgrading to Chancery SMS 5.4 or higher who has already integrated Microsoft Active Directory with Chancery SMS and must install and configure the latest version of Directory Integrator.	Follow the step-by-step instructions starting with “For more information about working with Base Roles, Roles, and Accounts in Chancery SMS, see “Controlling User Access” in the Chancery SMS District Administration Guide. For more information about working with Staff records, see “Staff” in the Chancery SMS District Administration Guide. Setting up Active Directory - Existing Customers (Previously Integrated)” on page 33.

When Microsoft Active Directory is integrated, log on to your workstation as you normally would.

Note the following:

- The network/workstation logon does not need to be the same as the Chancery SMS logon. For example, when accessing Library computers where users log on with generic, limited-access logon accounts, users can log on to a Library computer and then log on to Chancery SMS with their personalized Chancery SMS account.
- When you log on to Chancery SMS, a single user ID and password manages all the Chancery SMS roles associated with an account.
- Chancery SMS Directory Integrator supports multiple domains.
- When you integrate Microsoft Active Directory with Chancery SMS, the users and role assignments you create in Microsoft Active Directory are used to create user accounts in Chancery SMS. Once the Chancery SMS user accounts are created, default Staff records and default Staff School records are also created for each school user, based on the role assignment in Microsoft Active Directory.

Note

District users do not require Staff records and Staff Assignment records to log onto Chancery SMS.

- To facilitate the creation of user accounts in Chancery SMS, when you create user accounts in Microsoft Active Directory, enter as much information as possible, such as First Name, Last Name, etc. Active Directory uses this information to create Chancery SMS user accounts. In addition, these fields are used for synchronizing data between Microsoft Active Directory and Chancery SMS.

Integrating Microsoft Active Directory with Chancery SMS

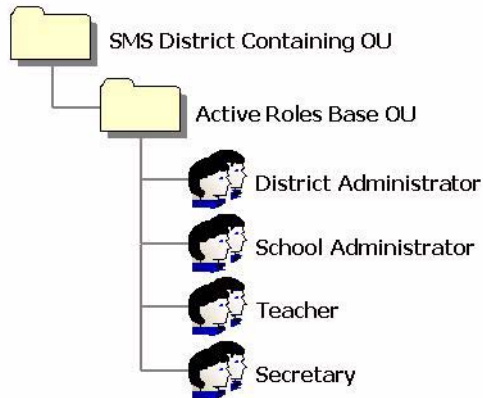
To successfully set up Microsoft Active Directory, you must be familiar with Microsoft Active Directory concepts, such as setting up Organizational Units, Groups, and Users. In addition, it's important that you understand how the concepts in Microsoft Active Directory relate to Chancery SMS.

Typically, Containing OUs are used to organize the structure. Depending on how complex your organization is, a Containing OU might represent your district. Then within the Containing OU, you would have Base OUs. This allows for a hierarchy that drills down from district to active and inactive role category groupings. The following table compares additional Microsoft Active Directory components to their Chancery SMS equivalent.

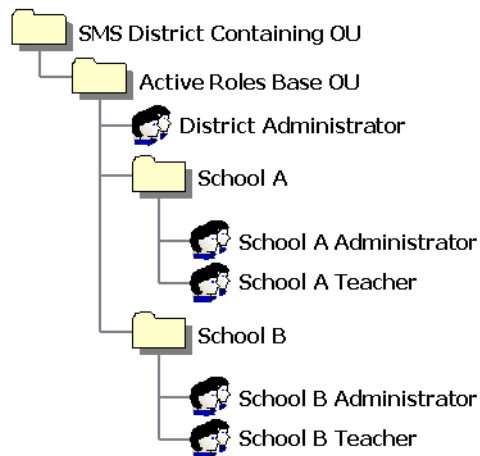
In Microsoft Active Directory	In Chancery SMS
Groups (within the Active Roles and Inactive Roles Base OUs, create Groups that correspond to Chancery SMS roles)	Roles (not base roles)
Users assigned to groups (i.e., Chancery SMS roles)	Accounts (or users)

The following diagrams further illustrate the concepts of the Containing OU, and then using Base OUs and Groups to organize users by role.

Basic Organizational Units & Groups



Advanced Organizational Units & Groups



To use Microsoft Active Directory to jointly manage network and Chancery SMS logon accounts, make sure the Organizational Units, Groups, and Users are set up according to Chancery recommendations, as seen in the previous illustrations. You can also create Active Roles and Inactive Roles Base Organizational Units to help you better manage users.

When creating your Organizational Unit structure, follow these rules:

- One Organizational Unit must represent a district (also known as the SMS Containing OU).
- If maintaining multiple districts, a Base OU cannot contain another Base OU.
- If maintaining multiple districts, it is recommended that the SMS Containing OU not contain another SMS Containing OU as this will cause confusion.
- Under the OU (SMS Containing OU), create Base OUs to help organize roles.
- You can create placeholders for inactive users by creating an Inactive Roles folder.
- In the Base OU, you cannot have Groups nested within Groups. For example, you cannot create a Teacher Group and then nest types of Teachers within that Group. Instead, at the same hierarchy level, create a Group for each type of Teacher role.
- Within a Base OU, all Groups represent Chancery SMS roles.
- Within a Base OU, you can create additional Organizational Units to help you organize your district by region, schools, and so on.
- Users in Groups outside the Chancery SMS Containing OU can be included as members, who are then given access to Chancery SMS. For example, if you have another group outside of the Base OU you can make that group a member of the role, thus making every member of the original group a member of the role.

Note

For the purposes of this document, Microsoft Active Directory Groups will be referred to as role Groups. This is to help users understand the relationship between an Microsoft Active Directory Group and a Chancery SMS role.

- The primary domain (the domain containing the Base OU) must contain a Global Catalog if multiple domain support is required. Global Catalog is recommended for improved performance in both single and multiple domain instances.
- If multiple domain support is required, domains must have some form of trust in order to communicate with each other and with the Global Catalog.

SETTING UP MICROSOFT ACTIVE DIRECTORY - NEW CUSTOMERS

When setting up Microsoft Active Directory to integrate with Chancery SMS, follow these steps in order:

- 1 Install Chancery SMS 5.4 or higher, following the instructions in the Chancery SMS Installation Guide - SQL Server 2000. See “Step 1: Install Chancery SMS” on page 5.
- 2 Install the Chancery SMS Directory Integrator. See “Step 2: Install Chancery SMS Directory Integrator” on page 5.
- 3 Configure Task Manager. See “Step 3: Configure Task Manager” on page 6.
- 4 Configure Chancery SMS Directory Integrator. See “Step 4: Configure Chancery SMS Directory Integrator” on page 8.
- 5 Manage Users within Microsoft Active Directory. See “Step 5: Working with Microsoft Active Directory” on page 17.
- 6 Update Roles and Accounts in Chancery SMS. See “Step 6: Working with Chancery SMS Roles, Accounts, and Staff Records” on page 17.

Step 1: Install Chancery SMS

For detailed instructions, see the Chancery SMS Installation Guide - SQL Server 2000.

When you install the Chancery SMS database, Task Manager is automatically installed on the web server at one of the following locations:

- If you install Chancery SMS on a database server, Task Manager is in `c:\csl\smsbusinessobjects`.
- If you install Chancery SMS on a web server, Task Manager is in `\inetpub\wwwroot\chancerysms`.
- If you install Chancery SMS on a combination database/web server, Task Manager is in `c:\csl\smsbusinessobjects`.

Step 2: Install Chancery SMS Directory Integrator

Chancery SMS Directory Integrator is the utility that connects the Microsoft Active Directory to the Chancery SMS roles and accounts.

TO INSTALL CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 Download the Chancery SMS Directory Integrator Installer from the Chancery Support site.

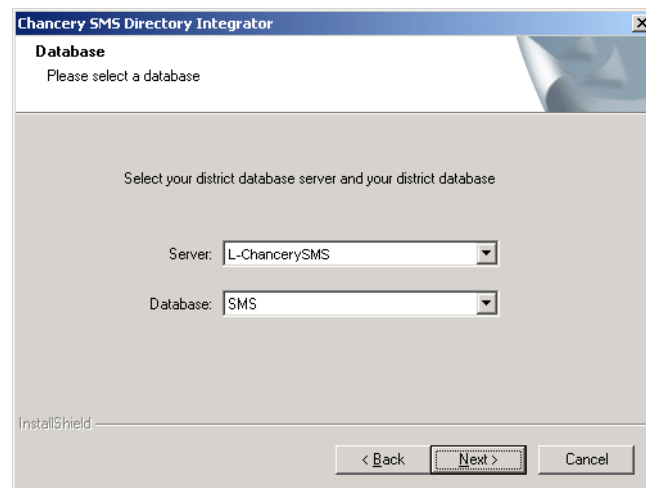
OR

Insert the Chancery SMS Installation CD into your drive.

- 2 Locate and double-click D1setup.exe. Click Next.
- 3 In the Chancery SMS Directory Integrator dialog, select the server where the Chancery SMS database is installed. From the database dropdown, select the name of the SQL database.

Note

If your Chancery SMS database is CSL_SMS, SMS appears in the dropdown.



- 4 Follow the onscreen instructions, then click Finish.

The files are installed in the CSL/DirectoryIntegrator folder.

Step 3: Configure Task Manager

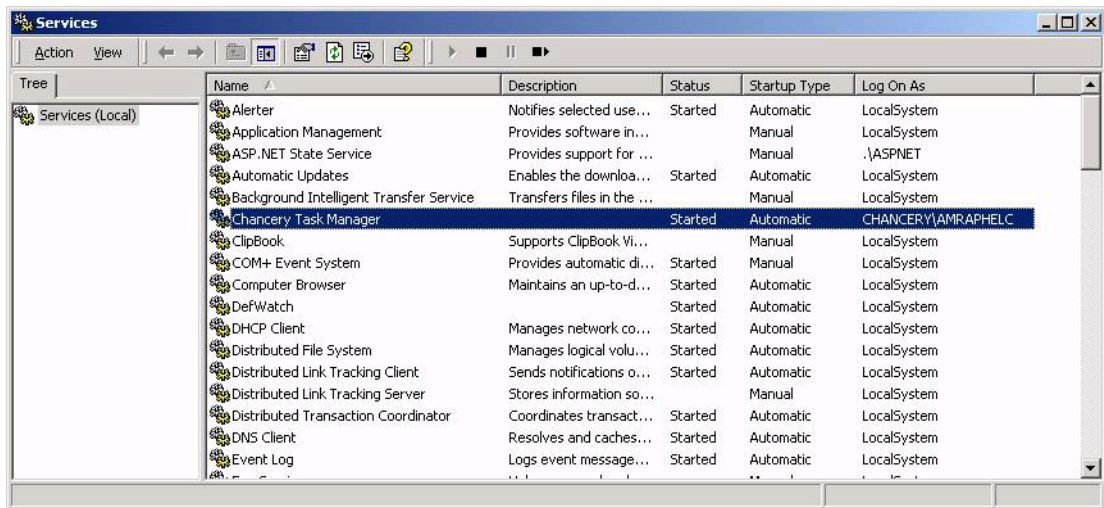
Task Manager synchronizes the specified role Groups and users within those role Groups with Chancery SMS.

Before you begin, make sure Task Manager has an Microsoft Active Directory Account with Read access.

TO CONFIGURE TASK MANAGER:

- 1 Log on to the server where Task Manager is installed.

- 2 From the Windows Start menu, click Programs > Administrative Tools > Services.



- 3 In the Services window, in the right-hand pane, select and right-click Chancery Task Manager, then choose Properties.
- 4 In the Chancery Task Manager Properties dialog, on the Log On tab, select “This account”, select Local System, replace Local System with the user ID that had Read access to Microsoft Active Directory, and then enter the password for that account.



- 5 Click OK. When prompted, restart the service.

Task Manager now has access to Microsoft Active Directory.

Step 4: Configure Chancery SMS Directory Integrator

Before Microsoft Active Directory and Chancery SMS are integrated, you must configure the Chancery SMS Directory Integrator.

Before you configure Chancery SMS Directory Integrator, define your Microsoft Active Directory structure by creating organizational units, including a Containing Organizational Unit that represents your district.

In addition, delegate control for the Containing OU, not the Base OU, so Write access is assigned to the Base OUs within the Containing OU.

TO CREATE ORGANIZATIONAL UNITS:

- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.
- 3 In the Active Directory Users and Computers dialog, create an Organizational Unit. At the level where you want this Organizational Unit to reside, right-click, then choose New > Organizational Unit.
- 4 In the New Object dialog, enter the full name of the Containing Organizational Unit, such as your Chancery SMS district name.

Note

If you have multiple districts on your server, the district Organizational Units do not need to reside at the same hierarchal level within Microsoft Active Directory. However, make sure Organizational Units that represent districts do not contain other district Organizational Units. I.e., a Base OU cannot contain another Base OU.

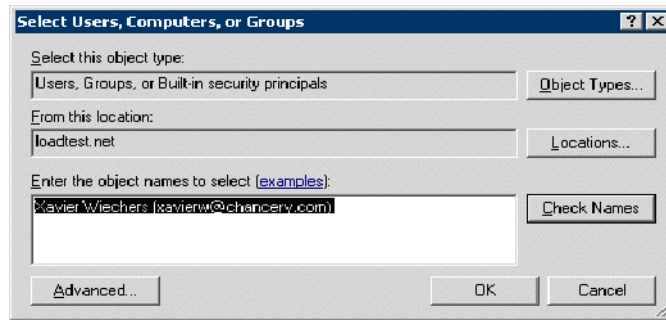
- 5 Create Base OUs and role Groups, following the recommendations outlined in “Integrating Microsoft Active Directory with Chancery SMS” on page 2.

When you have created the Containing Organizational Unit, first delegate control, then run Directory Integrator.

TO DELEGATE CONTROL:

- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.
- 3 In the Users and Computers window, in the right-hand pane, select the Containing OU, then right-click and choose Delegate Control.
- 4 In the Delegation of Control Wizard dialog, click Next.

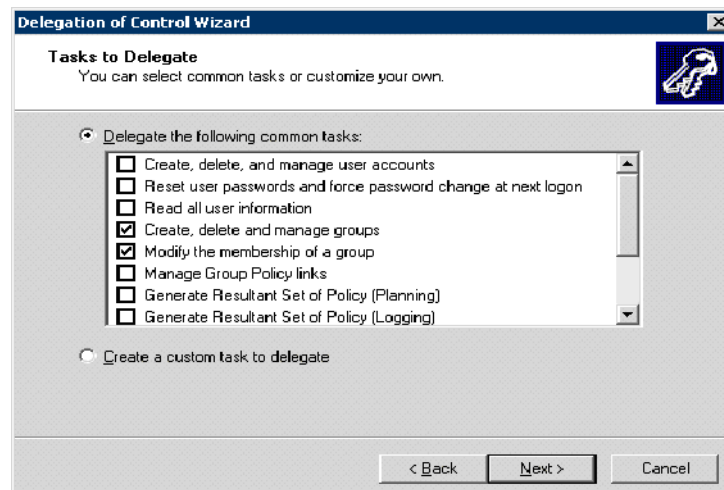
- 5 In the Users & Groups dialog, click Add.
- 6 In the Select Users, Computers, or Groups dialog, for Object Types, select Users, Groups, or Built-in security principals. For Locations, select the default domain where the Chancery SMS database server is installed. In the “Enter the object names to select” field, enter the user name of the person who will be configuring Chancery SMS Directory Integrator.



- 7 To verify the user name against the Microsoft Active Directory database, click Check Names.

This person will have Write access to the Microsoft Active Directory Containing OU via the Chancery SMS Directory Integrator.

- 8 Click OK, then click Next.
- 9 In the Delegation of Control Wizard dialog, select “Delegate the following common tasks”, then select “Create, delete and manage groups” and “Modify the membership of a group”. Click Next.



- 10 Click Finish.

TO CONFIGURE CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 On the computer where Chancery SMS Directory Integrator is installed, from the Windows Start menu, click Programs > Chancery SMS > Chancery SMS Directory Integrator.
- 2 In the Chancery SMS Directory Integrator Log On dialog, enter your Microsoft Active Directory user ID, password, and domain. From the Type dropdown, make sure Microsoft Active Directory Authentication is set to Secure.

Note

The fields visible on the Directory Integrator page depends on whether integration has taken place. Also, once Chancery SMS and Microsoft Active Directory are integrated, users other than the Administrator can log on.

CHANCERY
STUDENT MANAGEMENT SOLUTIONS

Directory Integrator

User ID:

Password:

Domain:

Type:

Authentication:

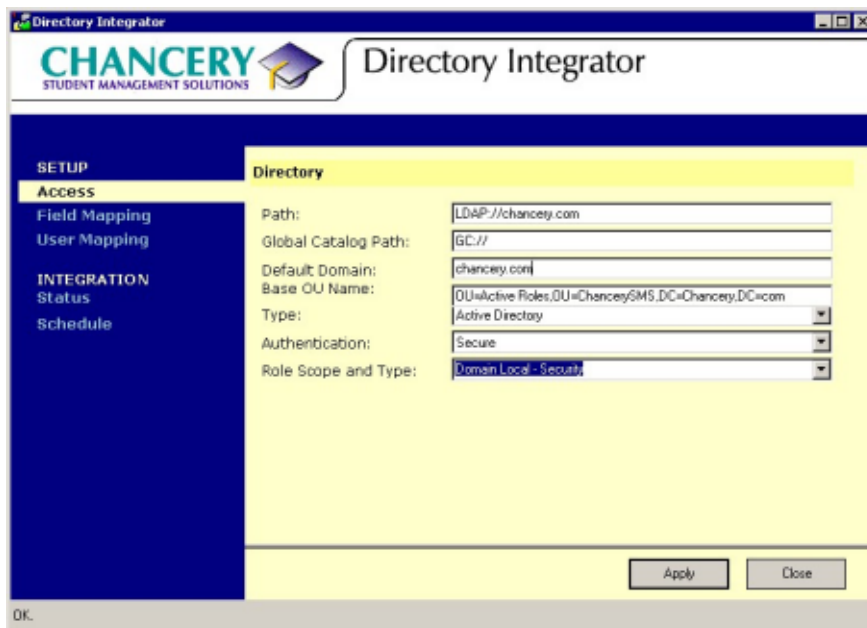
Chancery SMS has not been integrated to a directory system yet.

Please select the directory type you will be integrating with as well as your directory's user id, password and domain. User must be a Domain Administrator.

4.0.0.107 © 1998-2003 Chancery Software Ltd. All rights reserved.

- 3 Click Log On.
- 4 In Chancery SMS Directory Integrator, on the Access page, in the Path field, enter the full domain path name. For example: LDAP://chancery.com

Chancery SMS Directory Integrator fully supports fault tolerance as provided by Microsoft Active Directory.



- 5 If the Global Catalog resides on the primary domain, enter GC:// in the Global Catalog path field. If the Global Catalog does not reside on the primary domain, enter the full Global Catalog path. For example: GC://domainname.com.

- 6 Enter the domain default and the name of the Base OU within the Containing district OU. Make sure the information you enter in the Base OU Name field follows the RFC 1779 Standard.

For example, if your Default Domain is Chancery.com and your district's Organizational Unit (Containing OU) is Chancery SMS District, and you have an Active Roles Base OU, enter the following information in the Base OU Name field:

OU=Active Roles,OU=Chancery SMS District,DC=Chancery,DC=com

This tells Directory Integrator to go to the Chancery.com domain, then look within the Active Roles Base OU within the Chancery SMS District Containing OU.

- 7 From the Type dropdown, select Active Directory.
From the Authentication dropdown, select Secure.
- 8 From the Role Scope and Type dropdown, choose from the following options:
 - Local Security
 - Local Distribution

- Global Security
- Global Distribution
- Universal Distribution
- Universal Security

For best results, choose Local Security or Local Distribution. For more information about these options, see your Microsoft[®] documentation.

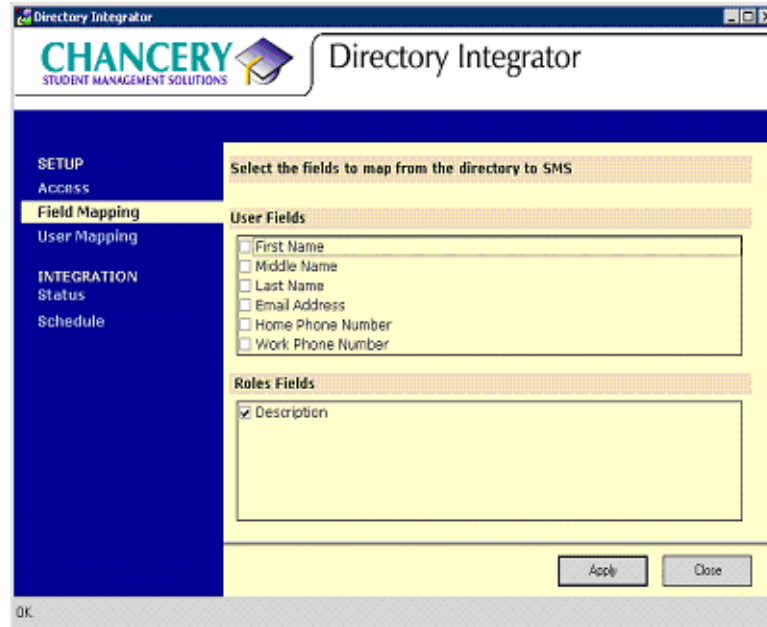
- 9 Click Apply. Click OK to confirm.
- 10 On the Field Mapping page, select the fields you want to control in Microsoft Active Directory. These fields automatically synchronize the account in Chancery SMS. By default, the role Description field is controlled in Microsoft Active Directory. Click Apply.

Note

User information entered in Microsoft Active Directory is used to create the Chancery SMS user account, regardless of what fields are selected on the Field Mapping page. That is, if data is entered in those fields in Microsoft Active Directory, the corresponding fields in Chancery SMS are populated, regardless of whether you indicate that Directory Integrator uses those fields to synchronize Microsoft Active Directory and Chancery SMS user information. The fields are:

- First Name
- Middle Name
- Last Name
- Email Address
- Home Phone Number

- Work Phone Number

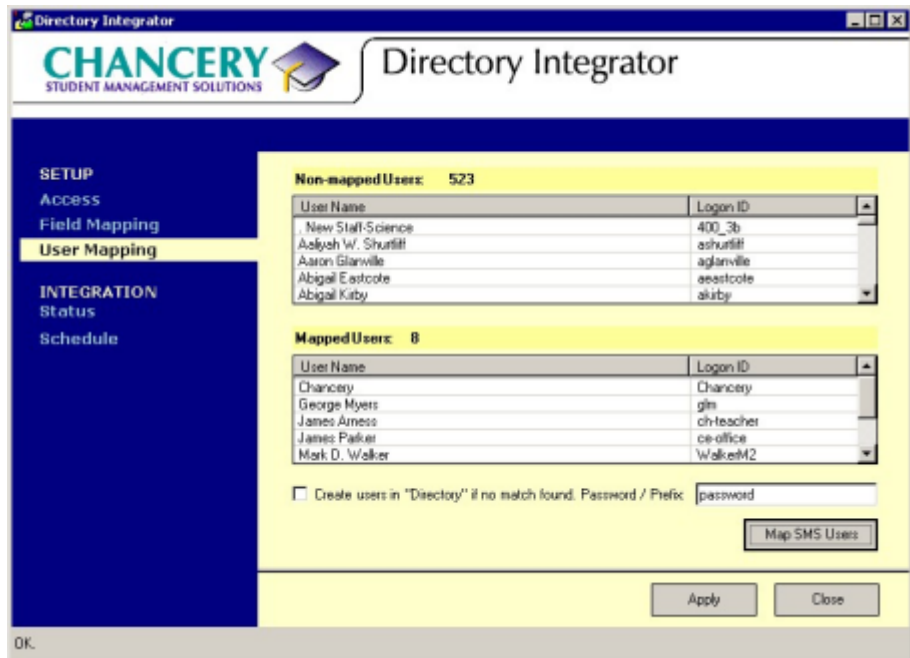


- 11 On the User Mapping page, click Map SMS Users. All users with Chancery SMS account information (i.e., user ID) that matches their Microsoft Active Directory account information are automatically mapped. Click Apply.

Note

Only users that are members of the Active Directory Active Roles Base OU (the base OU you chose to map on the access page) are mapped. Depending on your Microsoft Active Directory structure, you may need to manually drag and drop users into their appropriate role groups in Microsoft Active Directory. If you move users to other role Groups within Microsoft Active Directory, you

do not need to re-map the user. Directory Integrator recognizes the users based on their User IDs.



For unmapped users, revise their Microsoft Active Directory account information to match that in Chancery SMS, then click Map SMS Users again.

Note

Users show as inactive in the Chancery SMS role if the user is mapped once and then moved to a Base OU that is not part of the Microsoft Active Directory hierarchy being mapped, such as the Active Directory Inactive Roles Base OU.

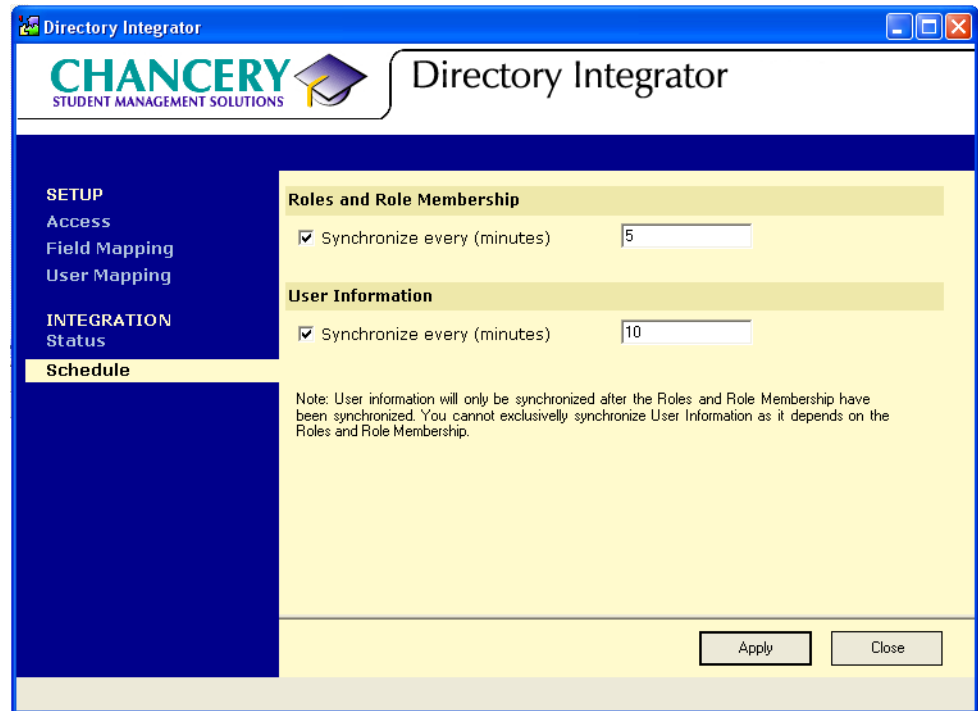
- 12 To create Microsoft Active Directory accounts for users who exist only in Chancery SMS, select “Create users in “Directory” if no match found” and enter the default password in the Password / Prefix field, then click Map SMS Users again.

Note

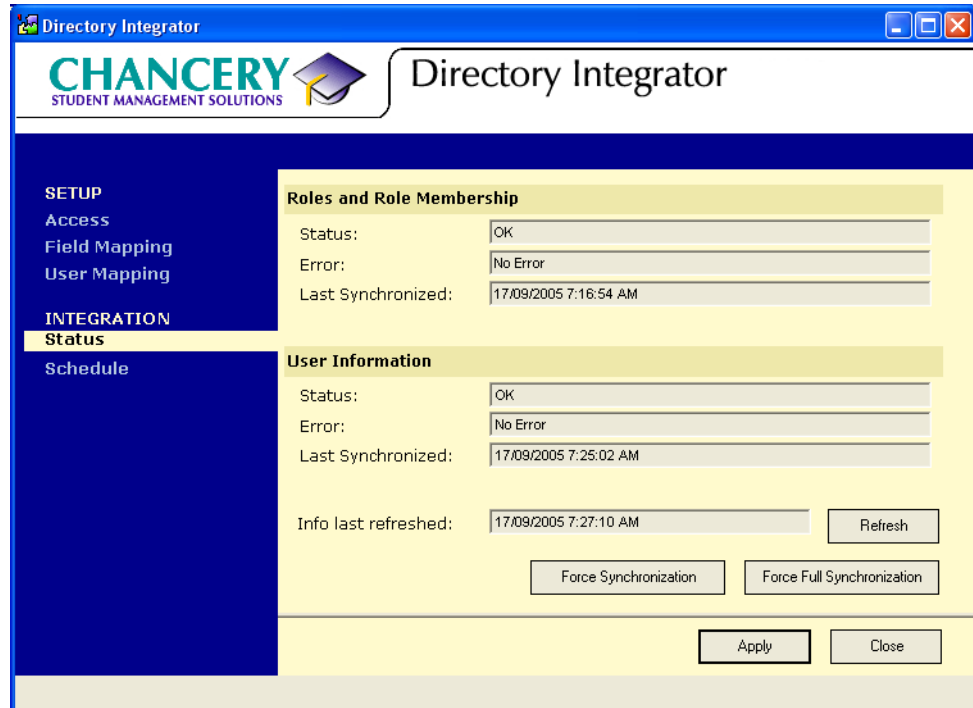
To complete this task, control must be delegated accordingly. For more information, see “Implementing Active Directory in a District Already Using Chancery SMS” on page 55.

- 13 On the Schedule page, indicate how frequently you want to synchronize Microsoft Active Directory Settings for the district with the Chancery SMS database. The defaults are every 5 minutes for Roles and Role

Membership, and every 10 minutes for User Information. If you change the defaults, click Apply.



- 14 On the Status page, view the status of data synchronization. User information and roles and role membership information is updated, as determined by the frequency defined on the Schedule page.



- 15 If you want to immediately synchronize Microsoft Active Directory Settings, choose from the following synchronization options:

Option	Description
Force Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for users with the Chancery SMS database. This will synchronize any changes made to users since the last update.
Force Full Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for role names, user information and role membership with the Chancery SMS database. This forces Chancery SMS Directory Integrator to crawl the Base OU and re-synchronize all group information with Microsoft Active Directory.

If you encounter problems during mapping, see “Troubleshooting” on page 53.

- 16 When you are finished configuring Chancery SMS Directory Integrator, click Apply. In the control bar, click Status. When the synchronization task is complete, restart IIS.

Step 5: Working with Microsoft Active Directory

When using Microsoft Active Directory with Chancery SMS, a role Group represents each role in your district. After using Directory Integrator to initially integrate Chancery SMS with Microsoft Active Directory, associate any new Chancery SMS users in your district with the appropriate role Group. This automatically creates a Chancery SMS account for these new users. Depending on your Microsoft Active Directory structure, you may need to associate users with specific role Groups.

Note

When creating users in Microsoft Active Directory, enter as much information about the user as possible. If possible, enter data in the following fields:

- First Name
- Middle Name
- Last Name
- Email Address
- Home Phone Number
- Work Phone Number

When Microsoft Active Directory integrates with Chancery SMS, the Chancery SMS user account is created, based on this information. Once the Chancery SMS user account is created, a default Staff and Staff School record is also created for each school user, based on the role assignment in Microsoft Active Directory.

In addition, use these fields to synchronize Microsoft Active Directory and Chancery SMS account information.

Step 6: Working with Chancery SMS Roles, Accounts, and Staff Records

When Microsoft Active Directory is integrated with Chancery SMS, role Groups you create within your district Base Organizational Unit hierarchy represent a Chancery SMS role. Any users assigned to one of these role Groups are automatically given an account in Chancery SMS. The users' access permissions are associated with the Chancery SMS role.

When you have set up your Microsoft Active Directory role Groups, you can then open the Chancery SMS role and modify the settings.

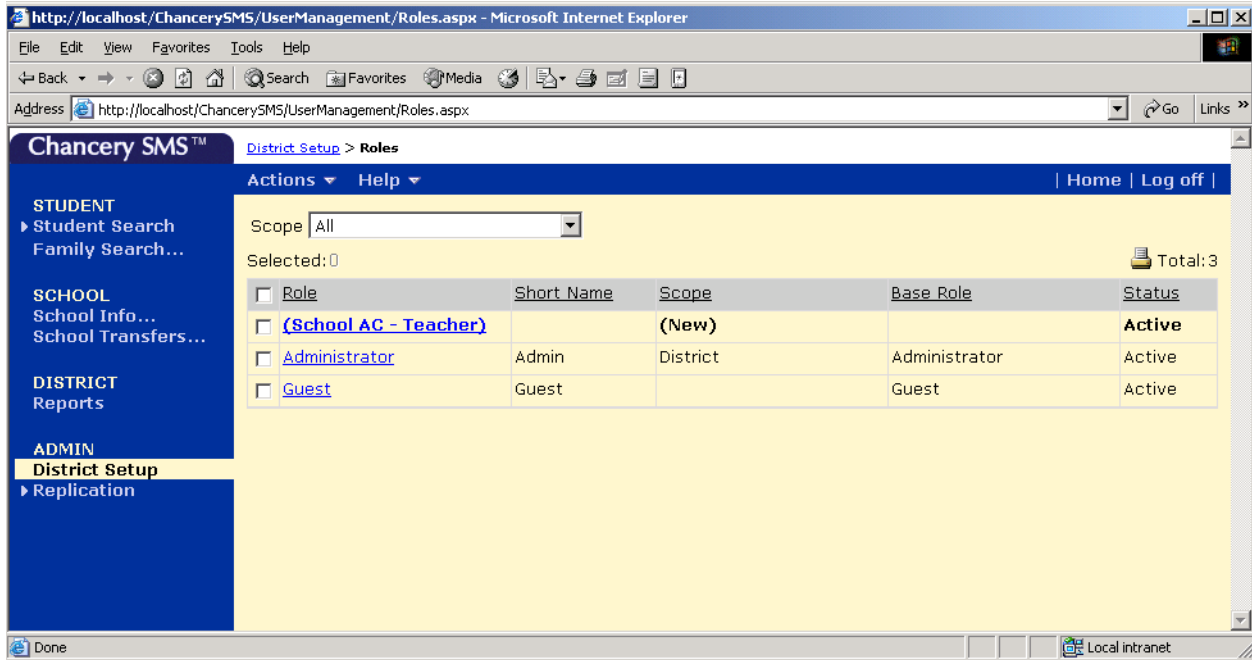
Note

After integrating with Microsoft Active Directory, passwords for Chancery accounts are controlled within Microsoft Active Directory. Instead of clicking Change Password on the Chancery SMS Log On page, change user passwords within Microsoft Active Directory.

TO EDIT A CHANCERY SMS ROLE:

- 1 In Chancery SMS, in the control bar, under Admin, click District Setup.
- 2 On the District Setup page, click Roles.

New Chancery SMS roles mapped from Microsoft Active Directory role Groups appear in Bold. To view only new roles, from the Scope dropdown, click New Roles Only.



- 3 On the Roles page, click the role you want to edit.
- 4 On the Edit Role page, update the necessary information.

Note

Information controlled in Microsoft Active Directory is view-only and indicated with a # symbol.

Setting	Description
Permissions	Update the permissions that apply to this group of users.
Short Name	Enter the Short Name that appears on the Role List page.
Scope	Indicate whether this role has district-wide access or school-specific permissions. Note When Chancery SMS integrates with Microsoft Active Directory, roles are initially created with No Scope. In Chancery SMS, assign the scope. Once scope is assigned, you can no longer edit it for this role.

For all school users requiring a Chancery SMS logon account, a default Staff record and a default Staff School record is created in Chancery SMS. As a result, school users can log on to Chancery SMS as soon as Chancery SMS is integrated with Microsoft Active Directory. Update the Staff and Staff School records with additional information as needed.

Note

District users do not require Staff records and Staff Assignment records to log onto Chancery SMS.

For more information about working with Base Roles, Roles, and Accounts in Chancery SMS, see “Controlling User Access” in the Chancery SMS District Administration Guide. For more information about working with Staff records, see “Staff” in the Chancery SMS District Administration Guide.

SETTING UP MICROSOFT ACTIVE DIRECTORY - EXISTING CUSTOMERS (NOT INTEGRATED)

When setting up Microsoft Active Directory to integrate with Chancery SMS, follow these steps in order:

- 1 Upgrade to Chancery SMS 5.4 or higher, following the instructions in the Chancery SMS Installation Notes. See “Step 1: Upgrade Chancery SMS” on page 21.
- 2 Verify that Chancery SMS logon information matches that in Microsoft Active Directory. See “Step 2: Verifying Chancery SMS Logon Information” on page 22.
- 3 In Chancery SMS, update logon information, as needed. See “Step 2: Verifying Chancery SMS Logon Information” on page 22.
- 4 Install the Chancery SMS Directory Integrator. See “Step 3: Install Chancery SMS Directory Integrator” on page 22.
- 5 Configure Task Manager. See “Step 4: Configure Task Manager” on page 23.
- 6 Configure Chancery SMS Directory Integrator. See “Step 5: Configure Chancery SMS Directory Integrator” on page 25.
- 7 Manage Users within Microsoft Active Directory. See “Step 6: Working with Microsoft Active Directory” on page 34.
- 8 Update Roles and Accounts in Chancery SMS. See “Step 7: Working with Chancery SMS Roles, Accounts, and Staff Records” on page 34.

Step 1: Upgrade Chancery SMS

For detailed instructions, see the Chancery SMS Installation Notes.

When you install the Chancery SMS database, Task Manager is automatically installed on the web server at one of the following locations:

- If you install Chancery SMS on a database server, Task Manager is in `c:\csl\smsbusinessobjects`.
- If you install Chancery SMS on a web server, Task Manager is in `\inetpub\wwwroot\chancerysms`.
- If you install Chancery SMS on a combination database/web server, Task Manager is in `c:\csl\smsbusinessobjects`.

Step 2: Verifying Chancery SMS Logon Information

When using Chancery SMS Directory Integrator, be aware that Chancery SMS user mapping will only be successful if the Chancery SMS logon information (user ID) exactly matches that in Microsoft Active Directory. Verify each Chancery SMS user account.

TO CHANGE CHANCERY SMS ACCOUNT LOGON INFORMATION:

- 1 In Chancery SMS, in the control bar, click District Setup, then click Accounts.
- 2 Click the name of the account you want to edit.
- 3 Confirm that the information in the user ID field is the same as that used in Microsoft Active Directory.
- 4 Click OK.

Step 3: Install Chancery SMS Directory Integrator

Chancery SMS Directory Integrator is the utility that connects the Microsoft Active Directory to the Chancery SMS roles and accounts.

TO INSTALL CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 Download the Chancery SMS Directory Integrator Installer from the Chancery Support site.

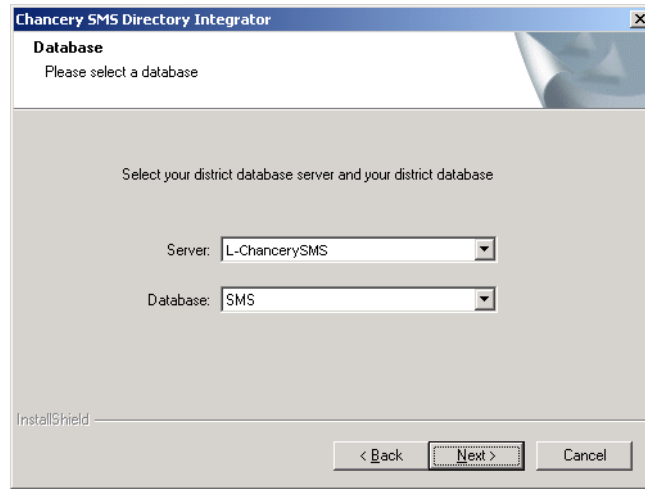
OR

Insert the Chancery SMS Installation CD into your drive.

- 2 Locate and double-click D\setup.exe. Click Next.
- 3 In the Chancery SMS Directory Integrator dialog, select the server where the Chancery SMS database is installed. From the database dropdown, select the name of the SQL database.

Note

If your Chancery SMS database is CSL_SMS, SMS appears in the dropdown.



- 4 Follow the onscreen instructions, then click Finish.

The files are installed in the CSL/DirectoryIntegrator folder.

Step 4: Configure Task Manager

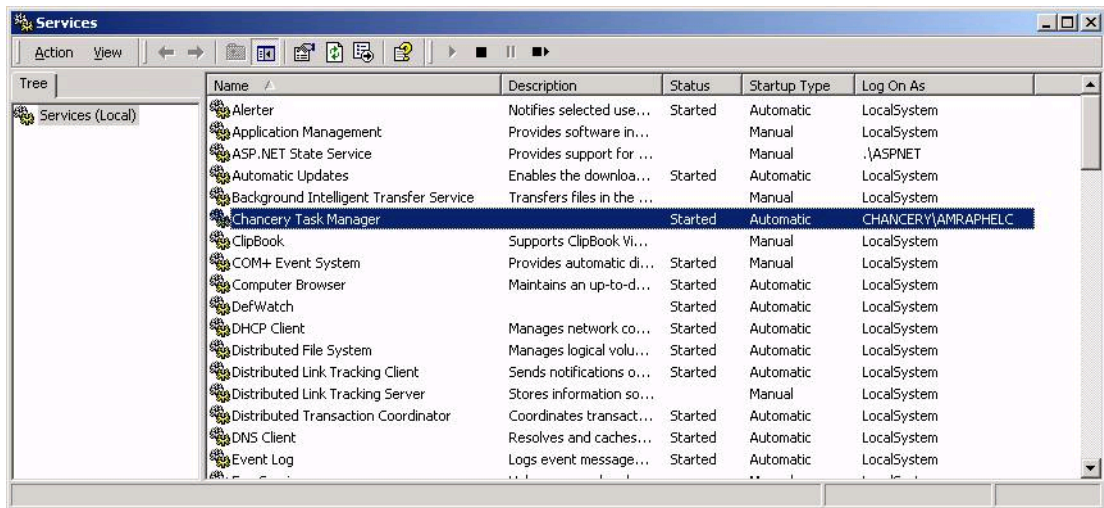
Task Manager synchronizes the Microsoft Active Directory role Groups and users within those role Groups with Chancery SMS.

Before you begin, make sure Task Manager has an Microsoft Active Directory Account with Read access.

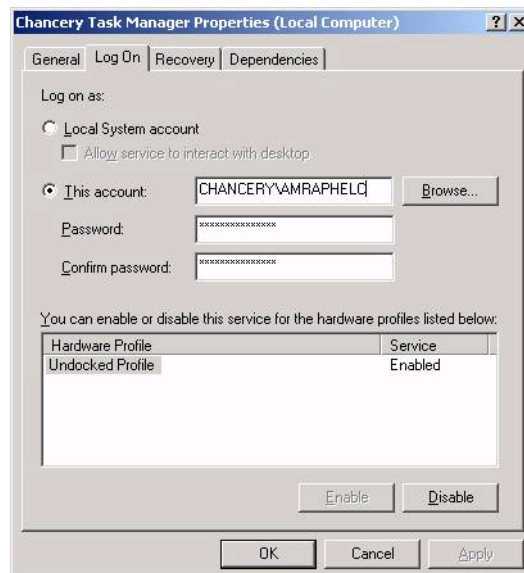
TO CONFIGURE TASK MANAGER:

- 1 Log on to the server where Task Manager is installed.

- From the Windows Start menu, click Programs > Administrative Tools > Services.



- In the Services window, in the right-hand pane, select and right-click Chancery Task Manager, then choose Properties.
- In the Chancery Task Manager Properties dialog, on the Log On tab, select “This account”, select Local System, replace Local System with the user ID that had Read access to Microsoft Active Directory, then enter the password for that account.



- Click OK. When prompted, restart the service.

Task Manager now has access to Microsoft Active Directory.

Step 5: Configure Chancery SMS Directory Integrator

Before Microsoft Active Directory and Chancery SMS are integrated, you must configure the Chancery SMS Directory Integrator.

Before you configure Chancery SMS Directory Integrator, define your Microsoft Active Directory structure by creating organizational units, including a Containing Organizational Unit that represents your district.

In addition, delegate control for the Containing OU, not the Base OU, so Write access is assigned to the Base OUs within the Containing OU.

TO CREATE ORGANIZATIONAL UNITS:

- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.
- 3 In the Active Directory Users and Computers dialog, create an Organizational Unit. At the level where you want this Organizational Unit to reside, right-click, then choose New > Organizational Unit.
- 4 In the New Object dialog, enter the full name of the Containing Organizational Unit, such as your Chancery SMS district name.

Note

If you have multiple districts on your server, the district Organizational Units do not need to reside at the same hierarchal level within Microsoft Active Directory. However, make sure Organizational Units that represent districts do not contain other district Organizational Units. I.e., a Base OU cannot contain another Base OU.

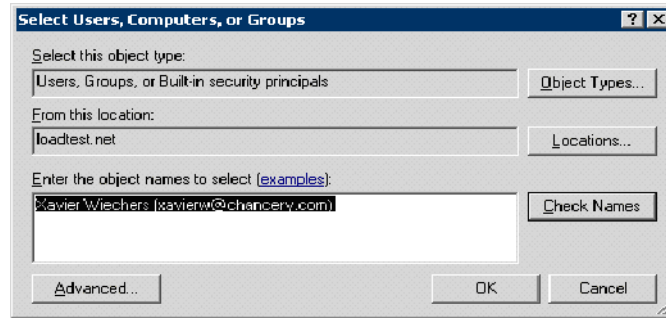
- 5 Create Base OUs and role Groups, following the recommendations outlined in “Integrating Microsoft Active Directory with Chancery SMS” on page 2.

When you have created the Containing Organizational Unit, first delegate control, then run Directory Integrator.

TO DELEGATE CONTROL:

- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.
- 3 In the Users and Computers window, in the right-hand pane, select the Containing OU, then right-click and select Delegate Control.
- 4 In the Delegation of Control Wizard dialog, click Next.

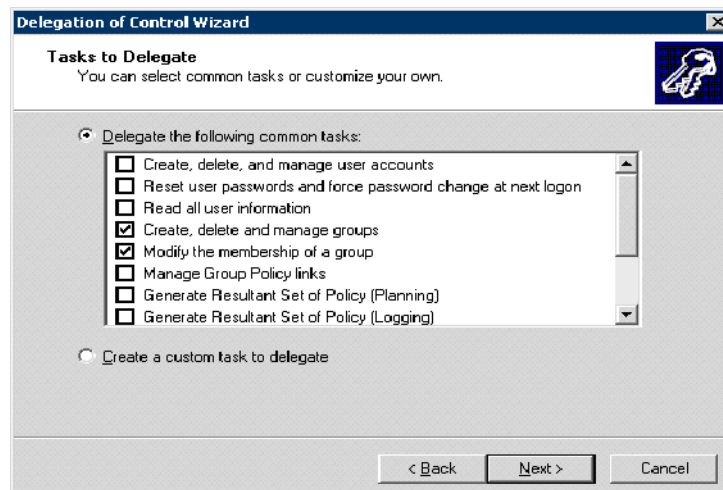
- 5 In the Users & Groups dialog, click Add.
- 6 In the Select Users, Computers, or Groups dialog, for Object Types, select Users, Groups, or Built-in security principals. For Locations, select the default domain where the Chancery SMS database server is installed. In the “Enter the object names to select” field, enter the user name of the person who will be configuring Chancery SMS Directory Integrator.



- 7 To verify the user name against the Microsoft Active Directory database, click Check Names.

This person will have Write access to the Microsoft Active Directory Containing OU via the Chancery SMS Directory Integrator.

- 8 Click OK, then click Next.
- 9 In the Delegation of Control Wizard dialog, select “Delegate the following common tasks”, then select “Create, delete and manage groups” and “Modify the membership of a group”. Click Next.



- 10 Click Finish.

TO CONFIGURE CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 On the computer where Chancery SMS Directory Integrator is installed, from the Windows Start menu, click Programs > Chancery SMS > Chancery SMS Directory Integrator.
- 2 In the Chancery SMS Directory Integrator Log On dialog, enter your Microsoft Active Directory user ID, password, and domain. From the Type dropdown, make sure Microsoft Active Directory Authentication is set to Secure.

Note

The fields visible on the Directory Integrator page depend on whether integration has taken place. Also, once Chancery SMS and Microsoft Active Directory are integrated, users other than the Administrator can log on.

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Directory Integrator

User ID: Administrator
Password: *****
Domain: chancery.com
Type: Active Directory
Authentication: Secure

Chancery SMS has not been integrated to a directory system yet.

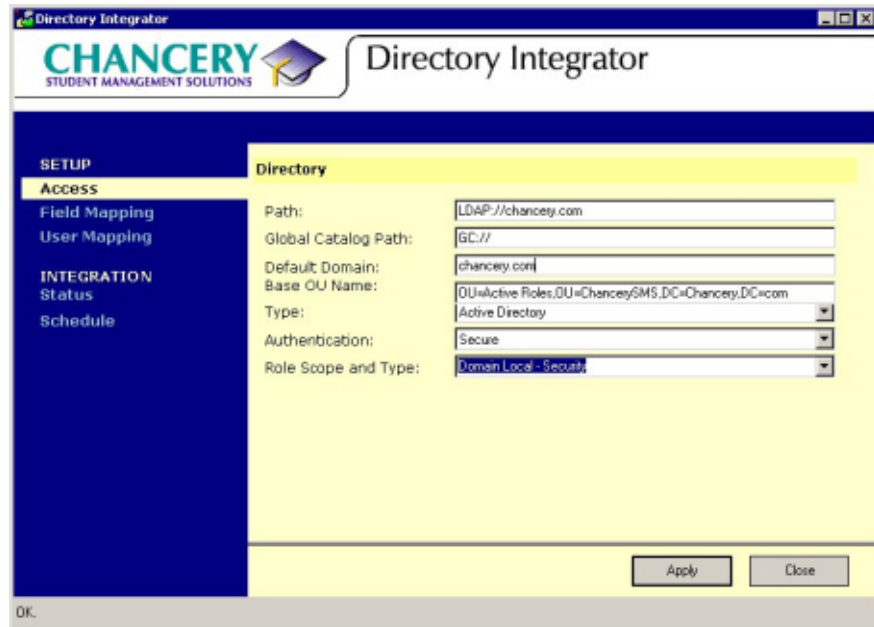
Please select the directory type you will be integrating with as well as your directory's user id, password and domain. User must be a Domain Administrator.

Log On Cancel

4.0.0.107 © 1998-2003 Chancery Software Ltd. All rights reserved.

- 3 Click Log On.
- 4 In Chancery SMS Directory Integrator, on the Access page, in the Path field, enter the full domain path name. For example: LDAP://chancery.com

Chancery SMS Directory Integrator fully supports fault tolerance as provided by Microsoft Active Directory.



- 5 If the Global Catalog resides on the primary domain, enter GC:// in the Global Catalog path field. If the Global Catalog does not reside on the primary domain, enter the full Global Catalog path. For example: GC://domainname.com.
- 6 Enter the domain default and the name of the Base OU within the Containing district OU. Make sure the information you enter in the Base OU Name field follows the RFC 1779 Standard.

For example, if your Default Domain is Chancery.com and your district's Organizational Unit (Containing OU) is Chancery SMS District, and you have an Active Roles Base OU, enter the following information in the Base OU Name field:

OU=Active Roles,OU=Chancery SMS District,DC=Chancery,DC=com

This tells Directory Integrator to go to the Chancery.com domain, then look within the Active Roles Base OU within the Chancery SMS District Containing OU.

- 7 From the Type dropdown, select Microsoft Active Directory.
From the Authentication dropdown, select Secure.
- 8 From the Role Scope and Type dropdown, choose from the following options:
 - Local Security
 - Local Distribution

- Global Security
- Global Distribution
- Universal Distribution
- Universal Security

For best results, choose Local Security or Local Distribution. For more information about these options, see your Microsoft documentation.

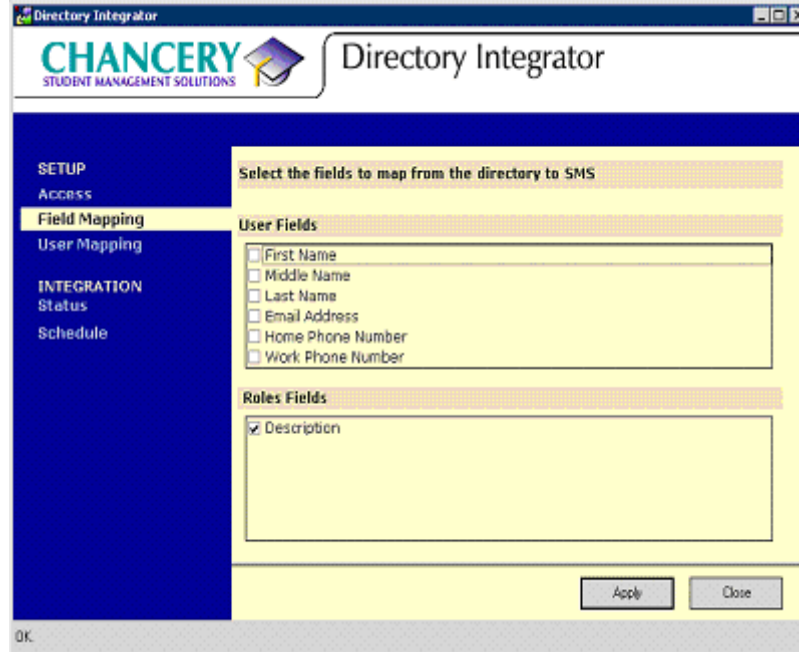
- 9 Click Apply. Click OK to confirm.
- 10 On the Field Mapping page, select the fields you want to control in Microsoft Active Directory. These fields automatically synchronize the account in Chancery SMS. By default, the role Description field is controlled in Microsoft Active Directory. Click Apply.

Note

User information entered in Microsoft Active Directory is used to create the Chancery SMS user account, regardless of what fields are selected on the Field Mapping page. That is, if data is entered in those fields in Microsoft Active Directory, the corresponding fields in Chancery SMS are populated, regardless of whether you indicate that Directory Integrator uses those fields to synchronize Microsoft Active Directory and Chancery SMS user information. The fields are:

- First Name
- Middle Name
- Last Name
- Email Address
- Home Phone Number

- Work Phone Number

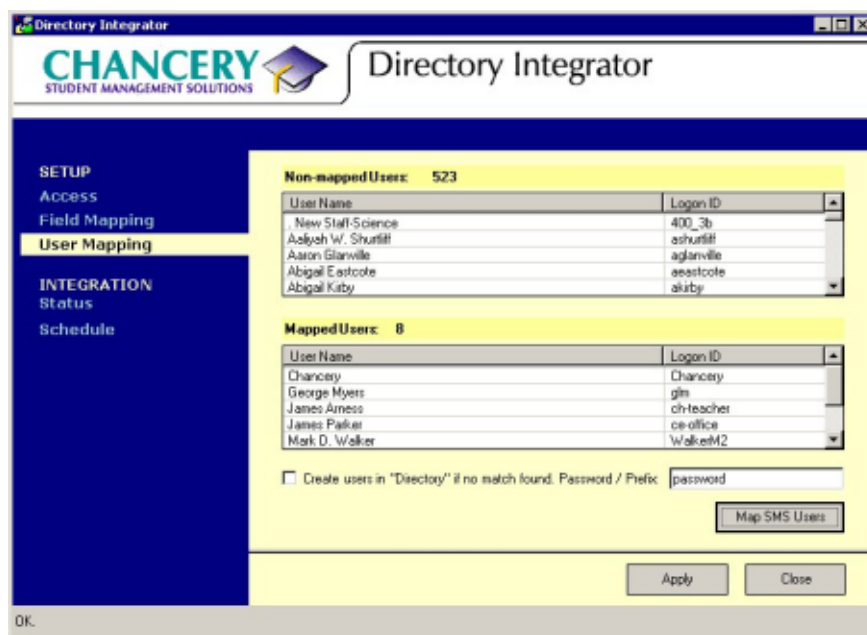


- 11 On the User Mapping page, click Map SMS Users. All users with Chancery SMS account information (i.e., user ID) that matches their Microsoft Active Directory account information are automatically mapped.

Note

Only users that are members of the Microsoft Active Directory Active Roles Base OU (the Base OU you chose to map on the Access page) are mapped. Depending on your Microsoft Active Directory structure, you may need to manually drag and drop users into their appropriate role Group in Microsoft Active Directory. If you move users to other role Groups within Microsoft

Active Directory, you do not need to re-map the users. Directory Integrator recognizes the users based on their User ID.



For unmapped users, revise their Microsoft Active Directory account information to match Chancery SMS, then click Map SMS Users again.

Note

Users show as inactive in the Chancery SMS role if the user is mapped once and then moved to a Base OU that is not part of the Microsoft Active Directory hierarchy being mapped, such as the Microsoft Active Directory Inactive Roles Base OU.

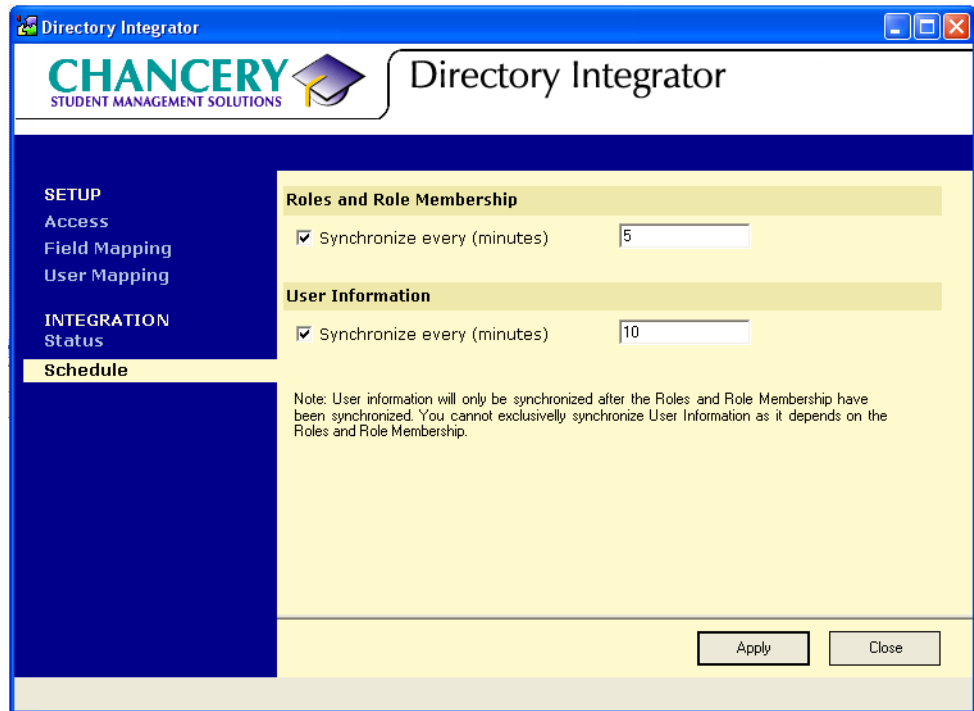
- 12 To create Microsoft Active Directory accounts for users who exist only in Chancery SMS, select “Create users in “Directory” if no match found” and enter the default password in the Password / Prefix field, then click Map SMS Users again.

Note

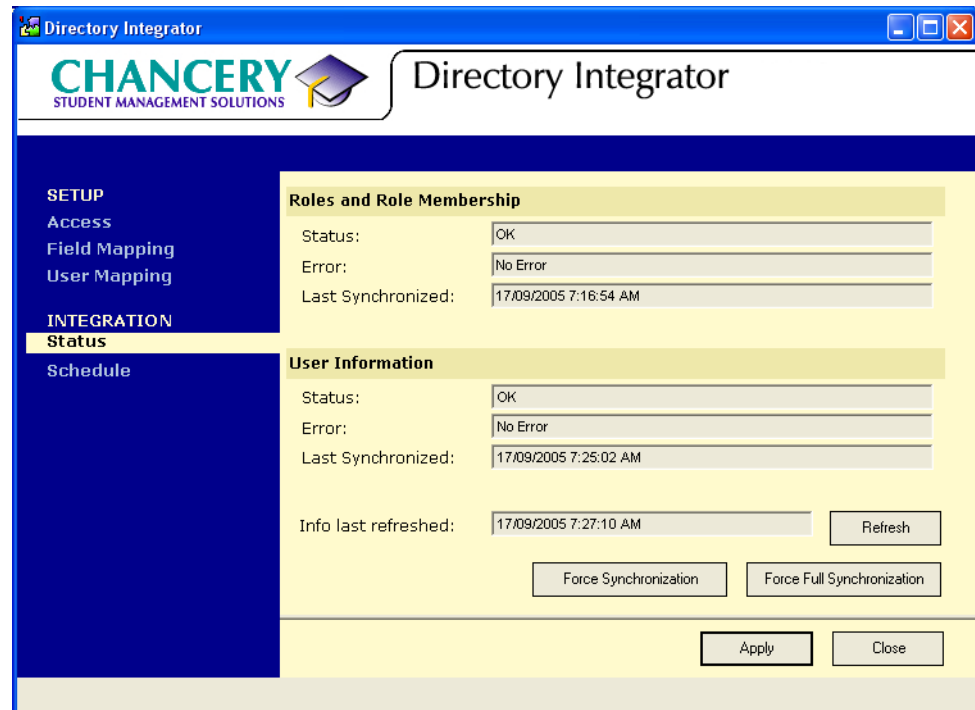
To complete this task, control must be delegated accordingly. For more information, see “Implementing Active Directory in a District Already Using Chancery SMS” on page 55.

- 13 On the Schedule page, indicate how frequently you want to synchronize Microsoft Active Directory Settings for the district with the Chancery SMS database. The defaults are every 5 minutes for Roles and Role

Membership, and every 10 minutes for User Information. If you change the defaults, click Apply.



- 14** On the Status page, view the status of data synchronization. User information and roles and role membership information is updated, as determined by the frequency defined on the Schedule page.



- 15** If you want to immediately synchronize Microsoft Active Directory Settings, choose from the following synchronization options:

Option	Description
Force Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for users with the Chancery SMS database. This will synchronize any changes made to users since the last update.
Force Full Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for role names, user information and role membership with the Chancery SMS database. This forces Chancery SMS Directory Integrator to crawl the Base OU and re-synchronize all group information with Microsoft Active Directory.

If you encounter problems during mapping, see “Troubleshooting” on page 53.

- 16** When you are finished configuring Chancery SMS Directory Integrator, click Apply. In the control bar, click Status. When the synchronization task is complete, restart IIS.

Step 6: Working with Microsoft Active Directory

When using Microsoft Active Directory with Chancery SMS, a role Group represents each role in your district. After using Directory Integrator to initially integrate Chancery SMS with Microsoft Active Directory, associate any new Chancery SMS users in your district with the appropriate role Group. This automatically creates a Chancery SMS account for the users. Depending on your Microsoft Active Directory structure, you may need to associate users with specific role Groups.

Note

When creating users in Microsoft Active Directory, enter as much information about the user as possible. If possible, enter data in the following fields:

- First Name
- Middle Name
- Last Name
- Email Address
- Home Phone Number
- Work Phone Number

When Microsoft Active Directory integrates with Chancery SMS, the Chancery SMS user account is created, based on this information. Once the Chancery SMS user account is created, a default Staff and Staff School record is also created for each school user, based on the role assignment in Microsoft Active Directory.

In addition, use these fields to synchronize Microsoft Active Directory and Chancery SMS account information.

Step 7: Working with Chancery SMS Roles, Accounts, and Staff Records

When Microsoft Active Directory is integrated with Chancery SMS, role Groups you create within your district Base Organizational Unit hierarchy represent a Chancery SMS role. Any users assigned to one of these role Groups are automatically given an account in Chancery SMS. The users' access permissions are associated with the Chancery SMS role.

When you have set up your Microsoft Active Directory role Groups, you can then open the Chancery SMS role and modify the settings.

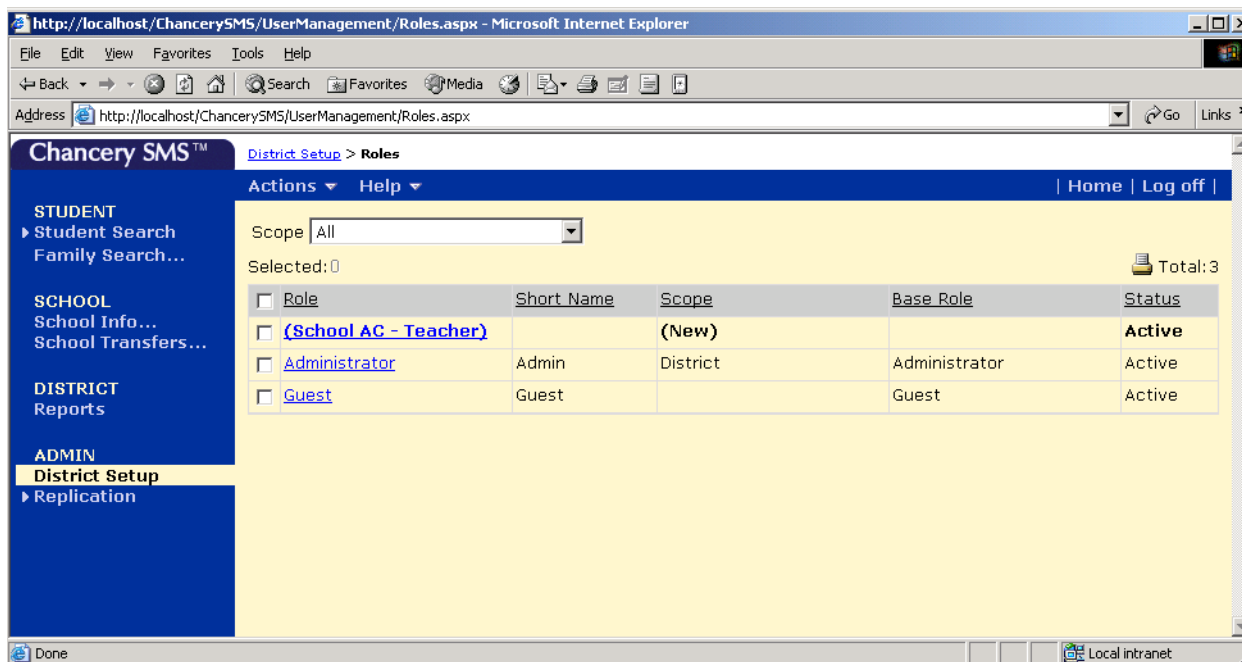
Note

After integrating with Microsoft Active Directory, passwords for Chancery accounts are controlled within Microsoft Active Directory. Instead of clicking Change Password on the Chancery SMS Log On page, change user passwords within Microsoft Active Directory.

TO EDIT A CHANCERY SMS ROLE:

- 1 In Chancery SMS, in the control bar, under Admin, click District Setup.
- 2 On the District Setup page, click Roles.

New Chancery SMS roles mapped from Microsoft Active Directory role Groups appear in Bold. To view only new roles, from the Scope dropdown, click New Roles Only.



- 3 On the Roles page, click the role you want to edit.
- 4 On the Edit Role page, update the necessary information.

Note

Information controlled in Microsoft Active Directory is view-only and indicated with a # symbol.

Setting	Description
Permissions	Update the permissions that apply to this group of users.
Short Name	Enter the Short Name that appears on the Role List page.
Scope	Indicate whether this role has district-wide access or school-specific permissions. Note When Chancery SMS integrates with Microsoft Active Directory, roles are initially created with No Scope. In Chancery SMS, assign the scope. Once scope is assigned, you can no longer edit it for this role.

For all school users requiring a Chancery SMS logon account, a default Staff record and a default Staff School record is created in Chancery SMS. As a result, school users can log on to Chancery SMS as soon as Chancery SMS is integrated with Microsoft Active Directory. Update the Staff and Staff School records with additional information as needed.

Note

District users do not require Staff records and Staff Assignment records to log onto Chancery SMS.

For more information about working with Base Roles, Roles, and Accounts in Chancery SMS, see “Controlling User Access” in the Chancery SMS District Administration Guide. For more information about working with Staff records, see “Staff” in the Chancery SMS District Administration Guide.

SETTING UP MICROSOFT ACTIVE DIRECTORY - EXISTING CUSTOMERS (PREVIOUSLY INTEGRATED)

When setting up Microsoft Active Directory to integrate with Chancery SMS, follow these steps in order:

- 1 Upgrade to Chancery SMS 5.4 or higher, following the instructions in the Chancery SMS Installation Notes. See “Step 1: Upgrade Chancery SMS” on page 37.
- 2 Install the Chancery SMS Directory Integrator. See “Step 2: Install New Chancery SMS Directory Integrator” on page 38.
- 3 If necessary, re-configure Task Manager. See “Step 3: Configure Task Manager” on page 39.
- 4 Configure Chancery SMS Directory Integrator. See “Step 4: Configure Chancery SMS Directory Integrator” on page 40.
- 5 Manage Users within Microsoft Active Directory. See “Step 5: Working with Microsoft Active Directory” on page 49.
- 6 Update Roles and Accounts in Chancery SMS. See “Step 6: Working with Chancery SMS Roles, Accounts, and Staff Records” on page 49.

Step 1: Upgrade Chancery SMS

For detailed instructions, see the Chancery SMS Installation Notes.

When you install the Chancery SMS database, Task Manager is automatically installed on the web server at one of the following locations:

- If you install Chancery SMS on a database server, Task Manager is in `c:\csl\smsbusinessobjects`.
- If you install Chancery SMS on a web server, Task Manager is in `\inetpub\wwwroot\chancerysms`.
- If you install Chancery SMS on a combination database/web server, Task Manager is in `c:\csl\smsbusinessobjects`.

Step 2: Install New Chancery SMS Directory Integrator

Chancery SMS Directory Integrator is the utility that connects the Windows Microsoft Active Directory to the Chancery SMS roles and accounts.

If you upgraded to Chancery SMS 5.4 or higher, you need to install the new version of Directory Integrator.

TO INSTALL CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 Download the Chancery SMS Directory Integrator Installer from the Chancery Support site.

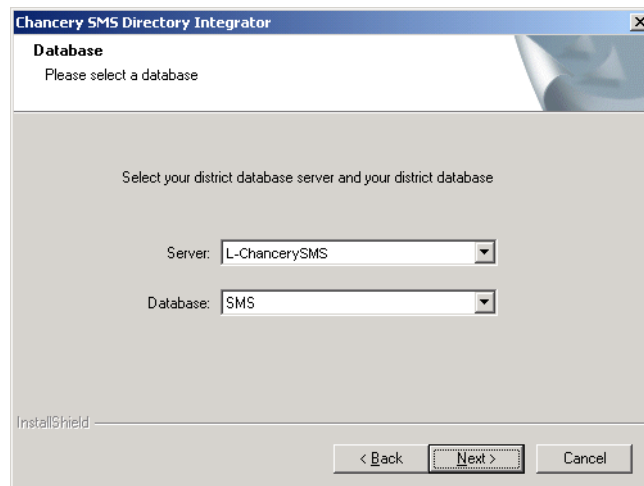
OR

Insert the Chancery SMS Installation CD into your drive.

- 2 Locate and double-click DIssetup.exe. Click Next.
- 3 In the Chancery SMS Directory Integrator dialog, select the server where the Chancery SMS database is installed. From the database dropdown, select the name of the SQL database.

Note

If your Chancery SMS database is CSL_SMS, SMS appears in the dropdown.



- 4 Follow the onscreen instructions, then click Finish.

The files are installed in the CSL/DirectoryIntegrator folder.

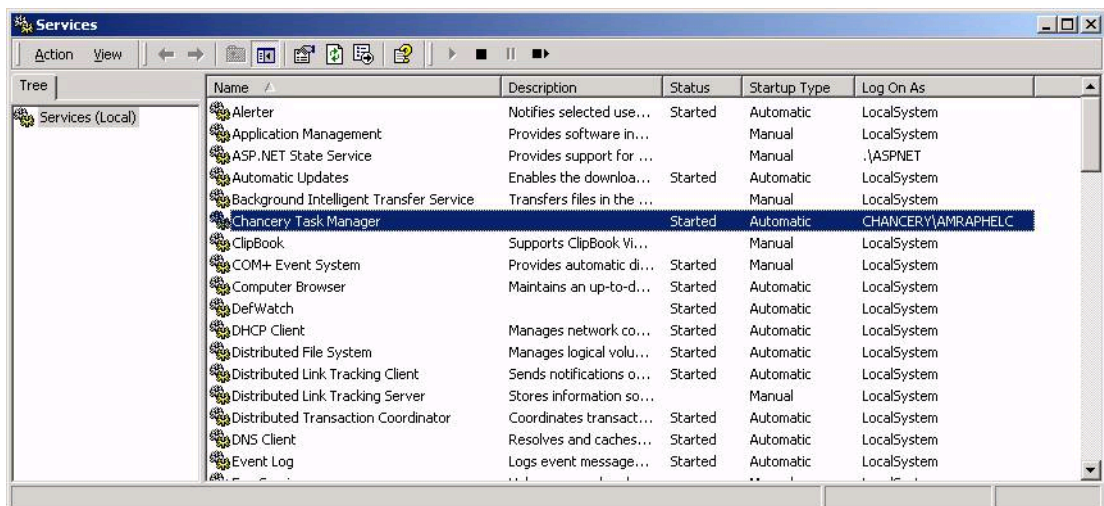
Step 3: Configure Task Manager

After you have upgraded to Chancery SMS 5.4 or higher, verify that the Task Manager is still configured so you can synchronize data. Task Manager synchronizes the Microsoft Active Directory role Groups and users within those role Groups with Chancery SMS.

Before you begin, make sure Task Manager has an Microsoft Active Directory Account with Read access.

TO CONFIGURE TASK MANAGER:

- 1 Log on to the server where Task Manager is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Services.



- 3 In the Services window, in the right-hand pane, select and right-click Chancery Task Manager, then choose Properties.
- 4 In the Chancery Task Manager Properties dialog, on the Log On tab, select "This account", select Local System and then replace Local System

with the user ID that had Read access to Microsoft Active Directory, then enter the password for that account.



- 5 Click OK. When prompted, restart the service.

Task Manager now has access to Microsoft Active Directory.

Step 4: Configure Chancery SMS Directory Integrator

After you have installed the current version of Directory Integrator, configure and then continue using Directory Integrator to map users and roles.

Note

Settings from the previous version of Directory Integrator are retained. However, it is recommended that you verify the settings.

Before you configure Chancery SMS Directory Integrator, define your Microsoft Active Directory structure by creating organizational units, including a Containing Organizational Unit that represents your district.

In addition, delegate control for the Containing OU, not the Base OU, so Write access is assigned to the Base OUs within the Containing OU.

TO CREATE ORGANIZATIONAL UNITS:

- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.

- 3 In the Active Directory Users and Computers dialog, create an Organizational Unit. At the level where you want this Organizational Unit to reside, right-click, then choose New > Organizational Unit.
- 4 In the New Object dialog, enter the full name of the Containing Organizational Unit, such as your Chancery SMS district name.

Note

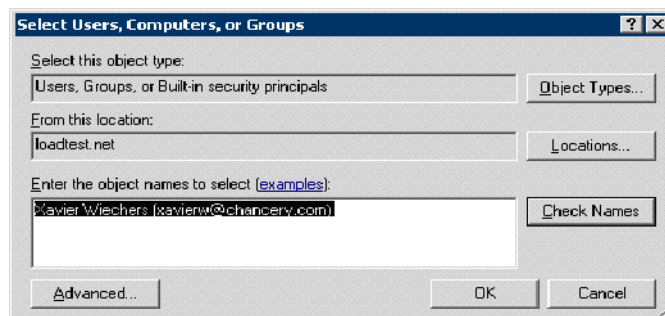
If you have multiple districts on your server, the district Organizational Units do not need to reside at the same hierarchal level within Microsoft Active Directory. However, make sure Organizational Units that represent districts do not contain other district Organizational Units. I.e., a Base OU cannot contain another Base OU.

- 5 Create Base OUs and role Groups, following the recommendations outlined in “Integrating Microsoft Active Directory with Chancery SMS” on page 2.

When you have created the Containing Organizational Unit, first delegate control, then run Directory Integrator.

TO DELEGATE CONTROL:

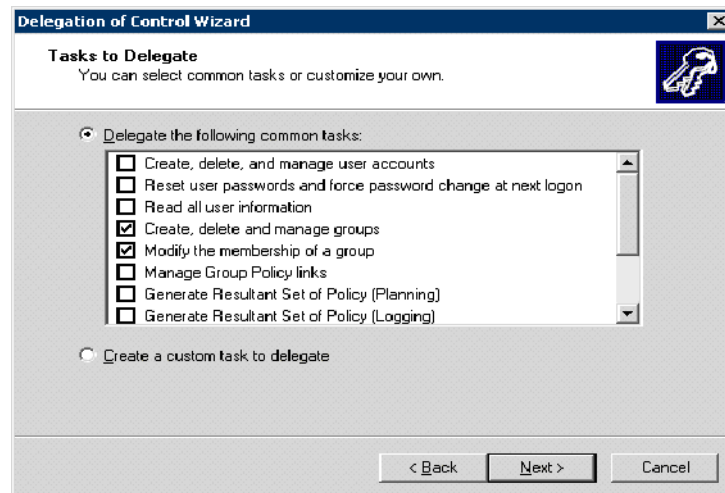
- 1 Log on to the server where Microsoft Active Directory is installed.
- 2 From the Windows Start menu, click Programs > Administrative Tools > Active Directory Users and Computers.
- 3 In the Users and Computers window, in the right-hand pane, select the Containing OU, then right-click and select Delegate Control.
- 4 In the Delegation of Control Wizard dialog, click Next.
- 5 In the Users & Groups dialog, click Add.
- 6 In the Select Users, Computers, or Groups dialog, for Object Types, select Users, Groups, or Built-in security principals. For Locations, select the default domain where the Chancery SMS database server is installed. In the “Enter the object names to select” field, enter the user name of the person who will be configuring Chancery SMS Directory Integrator.



- 7 To verify the user name against the Microsoft Active Directory database, click Check Names.

This person will have Write access to the Microsoft Active Directory Containing OU via the Chancery SMS Directory Integrator.

- 8 Click OK, then click Next.
- 9 In the Delegation of Control Wizard dialog, select “Delegate the following common tasks”, then select “Create, delete and manage groups” and “Modify the membership of a group”. Click Next.



- 10 Click Finish.

TO CONFIGURE CHANCERY SMS DIRECTORY INTEGRATOR:

- 1 On the computer where Chancery SMS Directory Integrator is installed, from the Windows Start menu, click Programs > Chancery SMS > Chancery SMS Directory Integrator.
- 2 In the Chancery SMS Directory Integrator Log On dialog, enter your Microsoft Active Directory user ID, password, and domain. From the Type dropdown, make sure Microsoft Active Directory Authentication is set to Secure.

Note

The fields visible on the Directory Integrator page depend on whether integration has taken place. Also, once Chancery SMS and Microsoft Active

Directory are integrated, users other than the Administrator are able to log on.

- 3 Click Log On.
- 4 In Chancery SMS Directory Integrator, on the Access page, in the Path field, enter the full domain path name. For example: LDAP://chancery.com

Chancery SMS Directory Integrator fully supports fault tolerance as provided by Microsoft Active Directory.

- 5 If the Global Catalog resides on the primary domain, enter GC:// in the Global Catalog path field. If the Global Catalog does not reside on the primary domain, enter the full Global Catalog path. For example: GC://domainname.com.

- 6 Enter the domain default and the name of the Base OU within the Containing district OU. Make sure the information you enter in the Base OU Name field follows the RFC 1779 Standard.

For example, if your Default Domain is Chancery.com and your district's Organizational Unit (Containing OU) is Chancery SMS District, and you have an Active Roles Base OU, enter the following information in the Base OU Name field:

`OU=Active Roles,OU=Chancery SMS District,DC=Chancery,DC=com`

This tells Directory Integrator to go to the Chancery.com domain, then look within all Active Roles Base OUs within the Chancery SMS District Containing OU.

- 7 From the Type dropdown, select Microsoft Active Directory.
From the Authentication dropdown, select Secure.
- 8 From the Role Scope and Type dropdown, choose from the following options:
 - Local Security
 - Local Distribution
 - Global Security
 - Global Distribution
 - Universal Distribution
 - Universal Security

For best results, choose Local Security or Local Distribution. For more information about these options, see your Microsoft documentation.

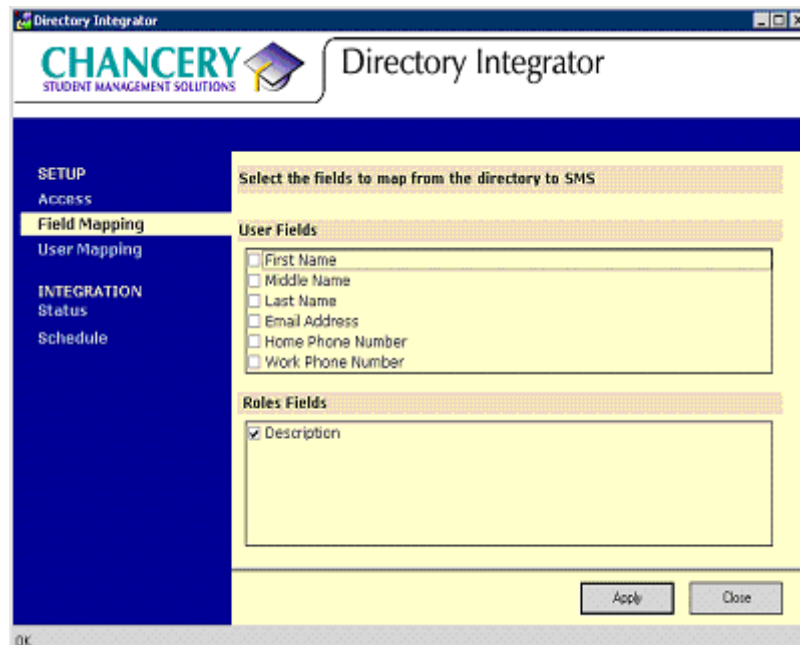
- 9 Click Apply. Click OK to confirm.
- 10 On the Field Mapping page, select the fields you want to control in Microsoft Active Directory. These fields automatically synchronize the account in Chancery SMS. By default, the role Description field is controlled in Microsoft Active Directory. Click Apply.

Note

User information entered in Microsoft Active Directory is used to create the Chancery SMS user account, regardless of what fields are selected on the Field Mapping page. That is, if data is entered in those fields in Microsoft Active Directory, the corresponding fields in Chancery SMS are populated, regardless of whether you indicate that Directory Integrator uses those fields to synchronize Microsoft Active Directory and Chancery SMS user information. The fields are:

- First Name
- Middle Name

- Last Name
- Email Address
- Home Phone Number
- Work Phone Number

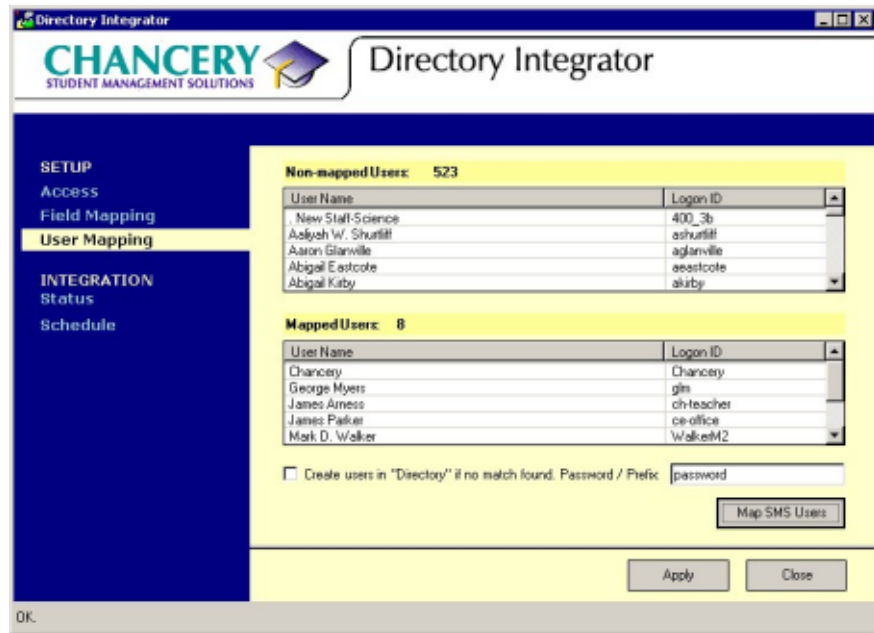


- 11 On the User Mapping page, click Map SMS Users. All users with Chancery SMS account information (user ID) that matches their Microsoft Active Directory account information are automatically mapped. If you already integrated Chancery SMS with Microsoft Active Directory, you do not need to perform this step.

Note

Only users that are members of the Microsoft Active Directory Active Roles Base OU (the Base OU you chose to map on the Access page) are mapped. Depending on your Microsoft Active Directory structure, you may need to manually drag and drop users into their appropriate role Group in Microsoft Active Directory. If you move users to other role Groups within Microsoft

Active Directory, you do not need to re-map the users. Directory Integrator recognizes the users based on their User ID.



For unmapped users, revise their Microsoft Active Directory account information to match that in Chancery SMS, then click Map SMS Users again.

Note

Users show as inactive in the Chancery SMS role if the user is mapped once and then moved to a Base OU that is not part of the Microsoft Active Directory hierarchy being mapped, such as the Microsoft Active Directory Inactive Roles Base OU.

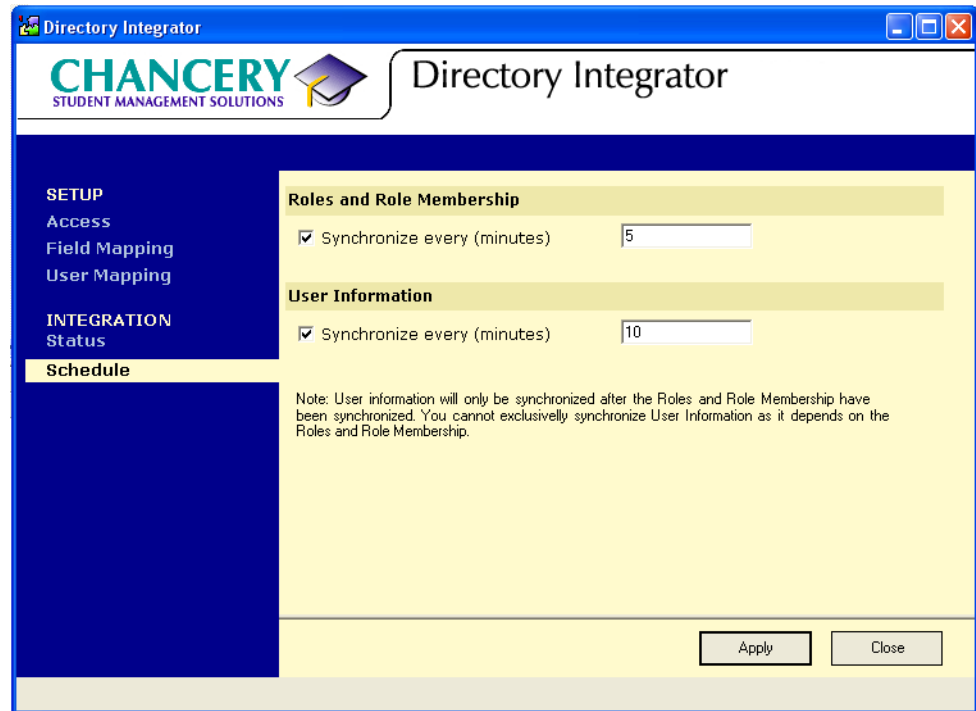
- 12 To create Microsoft Active Directory accounts for users who exist only in Chancery SMS, select “Create users in “Directory” if no match found” and enter the default password in the Password / Prefix field, then click Map SMS Users again.

Note

To complete this task, control must be delegated accordingly. For more information, see “Implementing Active Directory in a District Already Using Chancery SMS” on page 55.

- 13 On the Schedule page, indicate how frequently you want to synchronize Microsoft Active Directory Settings for the district with the Chancery SMS database. The defaults are every 5 minutes for Roles and Role

Membership, and every 10 minutes for User Information. If you change the defaults, click Apply.



- 14** On the Status page, view the status of data synchronization. User information and roles and role membership information is updated, as determined by the frequency defined on the Schedule page.

- 15** If you want to immediately synchronize Microsoft Active Directory Settings, choose from the following synchronization options:

Option	Description
Force Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for users with the Chancery SMS database. This will synchronize any changes made to users since the last update.
Force Full Synchronization	Click to immediately synchronize Microsoft Active Directory Settings for role names, user information and role membership with the Chancery SMS database. This forces Chancery SMS Directory Integrator to crawl the Base OU and re-synchronize all group information with Microsoft Active Directory.

If you encounter problems during mapping, see “Troubleshooting” on page 53.

- 16** When you are finished configuring Chancery SMS Directory Integrator, click Apply. In the control bar, click Status. When the synchronization task is complete, restart IIS.

Step 5: Working with Microsoft Active Directory

When using Microsoft Active Directory with Chancery SMS, a role Group represents each role in your district. After using Directory Integrator to initially integrate Chancery SMS with Microsoft Active Directory, associate any new Chancery SMS users in your district with the appropriate role Group. This automatically creates a Chancery SMS account for the new users. Depending on your Microsoft Active Directory structure, you may need to associate users with specific role Group.

Note

When creating users in Microsoft Active Directory, enter as much information about the user as possible. If possible, enter data in the following fields:

- First Name
- Middle Name
- Last Name
- Email Address
- Home Phone Number
- Work Phone Number

When Microsoft Active Directory integrates with Chancery SMS, the Chancery SMS user account is created, based on this information. Once the Chancery SMS user account is created, a default Staff and Staff School record is also created for each school user, based on the role assignment in Microsoft Active Directory.

In addition, use these fields to synchronize Microsoft Active Directory and Chancery SMS account information.

Step 6: Working with Chancery SMS Roles, Accounts, and Staff Records

When Microsoft Active Directory is integrated with Chancery SMS, role Groups you create within your district Base Organizational Unit hierarchy represent a Chancery SMS role. Any users assigned to one of these role Groups are automatically given an account in Chancery SMS. The users' access permissions are associated with the Chancery SMS role.

When you have set up your Microsoft Active Directory role Groups, you can then open the Chancery SMS role and modify the settings.

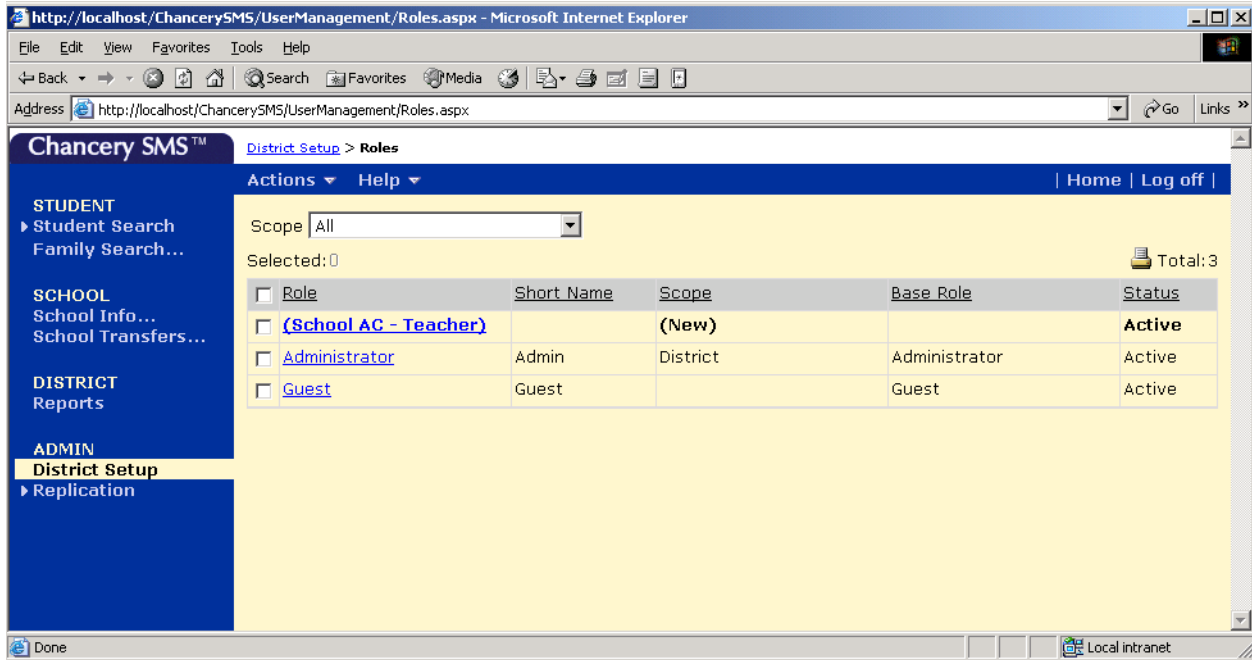
Note

After integrating with Microsoft Active Directory, passwords for Chancery accounts are controlled within Microsoft Active Directory. Instead of clicking Change Password on the Chancery SMS Log On page, change user passwords within Microsoft Active Directory.

TO EDIT A CHANCERY SMS ROLE:

- 1 In Chancery SMS, in the control bar, under Admin, click District Setup.
- 2 On the District Setup page, click Roles.

New Chancery SMS roles mapped from Microsoft Active Directory role Groups appear in Bold. To view only new roles, from the Scope dropdown, click New Roles Only.



- 3 On the Roles page, click the role you want to edit.
- 4 On the Edit Role page, update the necessary information.

Note

Information controlled in Microsoft Active Directory is view-only and indicated with a # symbol.

Setting	Description
Permissions	Update the permissions that apply to this group of users.
Short Name	Enter the Short Name that appears on the Role List page.
Scope	Indicate whether this role has district-wide access or school-specific permissions. Note When Chancery SMS integrates with Microsoft Active Directory, roles are initially created with No Scope. In Chancery SMS, assign the scope. Once scope is assigned, you can no longer edit it for this role.

For all school users requiring a Chancery SMS logon account, a default Staff record and a default Staff School record is created in Chancery SMS. As a result, school users can log on to Chancery SMS as soon as Chancery SMS is integrated with Microsoft Active Directory. Update the Staff and Staff School records with additional information as needed.

Note

District users do not require Staff records and Staff Assignment records to log onto Chancery SMS.

For more information about working with Base Roles, Roles, and Accounts in Chancery SMS, see “Controlling User Access” in the Chancery SMS District Administration Guide. For more information about working with Staff records, see “Staff” in the Chancery SMS District Administration Guide.

TROUBLESHOOTING

This section provides information on how to troubleshoot potential problems with your Microsoft Active Directory integration.

For more information, visit the Chancery Support web site at <http://support.chancery.com>.

Error Messages

The following table lists the error messages you might encounter when integrating Microsoft Active Directory with Chancery SMS, along with possible resolutions.

Status Message	Possible Resolution
Authentication Type not selected.	When you log on to Directory Integrator, from the Authentication dropdown, select an option, such as Secure.
SMS cannot integrate with itself. Please select a proper directory type to integrate with.	When you log on to Directory Integrator, from the Type dropdown, make sure you select Microsoft Active Directory.
Invalid Directory Path or Domain.	In Directory Integrator, on the Access page, make sure the data in the Path and Default Domain fields is entered correctly and follows the RFC 1779 Standard.
Time value must be entered (value is null).	In Directory Integrator, on the Schedule page, enter a value in the Synchronize every (minutes) fields.
Time value cannot be empty, it may only contain numbers (0..9). Decimal numbers are also not allowed.	In Directory Integrator, on the Schedule page, enter a recognized value in the Synchronize every (minutes) fields.
Time value must be between 1 and 1440 minutes.	In Directory Integrator, on the Schedule page, enter a recognized value in the Synchronize every (minutes) fields.
Time value must be entered (value is null).	In Directory Integrator, on the Schedule page, enter a recognized value in the Synchronize every (minutes) fields.
Time value cannot be empty, it may only contain numbers (0..9). Decimal numbers are also not allowed.	In Directory Integrator, on the Schedule page, enter a recognized value in the Synchronize every (minutes) fields.
Time value must be between 1 and 44640 minutes.	In Directory Integrator, on the Schedule page, enter a recognized value in the Synchronize every (minutes) fields.
Manual intervention is required	If manual intervention is required, contact Chancery Support. You can also view the Event Log to try to determine what went wrong. To view the Event Log, navigate to Programs > Administrative Tools > Event Viewer. In the left-hand pane, select Application Logs, then open the most recent Event Log. To better view the information in the Event Log, you can cut and paste the text into a text file.

Status Message	Possible Resolution
There are errors reported by the Directory Integration process. Select Apply or OK after correcting the problem.	View the Event Log to try to determine what went wrong. To view the Event Log, navigate to Programs > Administrative Tools > Event Viewer. In the left-hand pane, select Application Logs, then open the most recent Event Log. To better view the information in the Event Log, you can cut and paste the text into a text file.
Invalid or missing Base OU. Base OU cannot be found.	In Microsoft Active Directory, verify that the Containing OU and Base OU structure follows Chancery's recommendations. Also, in Directory Integrator, on the Access page, make sure the correct data is entered in the Base OU Name field.
Invalid Administrator Credentials	Enter the correct name and password.
Chancery SMS Directory Integrator tasks are currently running. Please try again.	An automatically scheduled task is currently running. Wait until the task completes, then try again.
Current version of Chancery SMS does not allow switching back to SMS authentication.	Make sure you are running the current version of Chancery SMS and Directory Integrator.
All settings are correct. However, all synchronization schedules are turned off. Directory changes will not be reflected in SMS.	In Directory Integrator, on the Schedule page, set up and activate a synchronization schedule.
Invalid Directory Path, Domain, or Administrator Credentials	In Directory Integrator, on the Access page, make sure the correct information is entered in the Path and Default Domain fields. Enter the correct name and password.
Error scheduling Tasks	In Directory Integrator, on the Schedule page, make sure the information is entered correctly.
Invalid SMS User. You must select a valid SMS user to link the Domain Administrator to.	In Microsoft Active Directory, make sure the user with Domain Administrator privileges is assigned to the Base OU that you are trying to map.
Too many SMS users match the specified SMS Administrator.	Enter the correct name and password.
Cannot find specified SMS Administrator	The user account for the specified Administrator has been deleted. In Microsoft Active Directory, on the Access page, enter another user in the Admin User ID field.
Cannot link Administrator to Chancery SMS	In Microsoft Active Directory, make sure the user with Domain Administrator privileges is assigned to the Chancery SMS Containing OU that you are trying to map.
General exception. Check Application Event Log and Task Manager Log for details.	Call Chancery Support for assistance?
Cannot synchronize unto itself. Directory has been Changed to SMS but the sync processes are still scheduled.	On the Directory Integrator Log On Page or on the Access page, make sure you select Microsoft Active Directory from the Type dropdown.
Chancery SMS is ahead of directory. Probable cause: Directory has been restored. Select Apply or OK after correcting the problem.	Call Chancery Support for assistance?

Unable to Access Pages in Chancery SMS

If you log on to Chancery SMS and the following error message appears:

You do not have permission to access this page. Contact your school administrator.

Make sure the user account is associated with at least one role that is mapped within Microsoft Active Directory. That is, if a user is associated with a role Group in Microsoft Active Directory that is not part of the Base OU being mapped in Directory Integrator, the user can log onto Chancery SMS, but they cannot navigate within the application.

If a user is associated with two roles, one that is mapped and one that is not, the user can switch roles within Chancery SMS.

Deleting Groups and Users in Microsoft Active Directory

Be careful when deleting role Groups and Users within Microsoft Active Directory. If you accidentally delete a role Group or User, re-adding the role Group or User will not automatically re-synchronize the data in Chancery SMS. This is because the Active Directory ID numbers will be different for the role Group or User that is re-added. If you do delete a role Group or User by mistake, you need to re-map and assign users as you would when creating new role Groups and Users.

Implementing Active Directory in a District Already Using Chancery SMS

If you are implementing Microsoft Active Directory in a district that is already using Chancery SMS, it is possible to use Directory Integrator to create Microsoft Active Directory users and Groups based on the existing Chancery SMS user accounts and roles. Microsoft Active Directory accounts created in this way are inactive by default. You will need to make them active within Active Directory.

To enable this functionality, in Active Directory Users and Computers, when delegating control, in the Tasks to Delegate dialog, make sure “Create, delete, and manage user accounts” is selected.

Then, when configuring the Chancery SMS Directory Integrator, on the User Mapping page, select “Create users in “Directory” if no match found” and enter the default password in the Password / Prefix field, then click Map SMS Users.

Fields and Values Used to Creating Default Staff and School Staff Records

The following tables detail the fields and default values that are populated when the default Staff and Staff School records are created in Chancery SMS. For more information about Chancery SMS tables and fields, see the Chancery SMS Data Dictionary.

Staff District Record (CSL_STAFF_DEMO_DISTRICT)

Field	Data Type (size)	Value	Note
STAFF_NUMBER	varchar (9)	T- + ID_SMS_USER	For example T-5977
OMIT_FROM_PDAS	char (1)	N	On the Staff Personal page.
DUMMY_090_RECORD	char (1)	N	On the Staff Personal page.
ID_SET_STAFF_SERVICE_EL	numeric (9,0)	10 (N/A)	On the Staff Personal page.
ID_STAFF_DEMO_DISTRICT	numeric (9,0)	Value associated with the user's Staff District Record	
ID_SMS_USER			User ID from CSL_SMS_USER. In other words = CSL_SMS_USER.ID_SMS_USER
ID_SET_STAFF_EDUCATION	numeric (9,0)	10 (N/A)	On the Staff Personal page, indicates the staff member's highest level of education.
ID_SET_FEDERAL_ETHNICITY	numeric (9,0)	10 (N/A)	On the Staff Personal page, indicates the staff member's federal ethnicity.
ID_SET_STAFF_POSITION	numeric (9,0)	10 (N/A)	On the Staff Personal page.
ID_SET_LICENSURE_CHECK_T N	numeric (9,0)	10 (N/A)	On the Staff Personal page, indicates whether a check of information about the teacher's license number, area of certification or specialty, state, and year/date of expiration is required. For Tennessee EIS reporting, indicates the reason why a staff member may not be in the licensure file.
SIF_ID	uniqueidentifier	newid()	Not visible in the interface. Default creates a unique ID for integration with the SIF Agent.

Staff School Record (CSL_STAFF_DEMO_SCHOOL)

Field	Type	Value	Note
ID_STAFF_DEMO_DISTRICT	numeric (9,0)	Value associated with the user's Staff District Record	
ID_SET_SCHOOL_INFO	numeric (6,0)	ID of the school the role was set for	
START_DATE	datetime	The earliest school Calendar date. If there is no calendar or calendar Date then the value "02-Jan-2002" is assigned. This is a flag to the user to set it to a proper date.	On the Staff School Assignment page, indicates the start date for the school assignment in MM/DD/YYYY format. The entry defaults to today's date.
END_DATE	datetime	NULL	On the Staff School Assignment page, if appropriate, enter the end date of the school assignment in MM/DD/YYYY format.
SCHEDULABLE	char (1)	Y	On the Staff School Assignment page, indicates whether a staff member is available for scheduling.
DISCIPLINARY_ACTION_ADMIN	char (1)	N	On the Staff School Assignment page, indicates whether a staff member is available to act as an administrator for discipline actions.
ID_SET_STAFF_STATUS_TN	numeric (9,0)	10 (N/A)	On the Staff School Assignment page, indicates whether a staff member has full-time or part-time status at the selected school. Required for Tennessee EIS reporting.
IS_ALWAYS_AVAILABLE	bit	1	When setting Staff Scheduling Properties, under Time Restrictions, indicates when the teacher is available to teach. By default, the staff member is always available.
MAX_SCHED_LOAD	numeric (6,4)	0	On the Staff Scheduling Defaults page, indicates the maximum scheduling load for the staff member.

Field	Type	Value	Note
MAX_STUDENTS	numeric (4,0)	0	On the Staff Scheduling Defaults page, indicates the maximum number of students the staff member can teach.
TEACHING_STATUS	tinyint	1	Not visible in the interface. This field defaults to "Is Teacher" for all staff members.

GLOSSARY

Active Directory (AD)

Active Directory is Microsoft's trademarked directory service, an integral part of the Windows 2000 architecture. Active Directory is a centralized and standardized system that automates network management of user data, security, and distributed resources, and enables interoperation with other directories. Active Directory is designed especially for distributed networking environments.

Chancery SMS Directory Integrator

An administrative tool used in conjunction with directory services to integrate your directory service with Chancery SMS.

Directory Service

Generic term describing your application used to manage users, groups, organizations, sites, computers, printers and other network resources. Examples include Microsoft's Active Directory (AD) and Novell's Directory Service (NDS).

Group (Role Group)

Groups are created using the administration tool of the Directory Service. If a role is to be District wide (such as a District Administrator) it is created once. If a role is school specific it must be created once for each school. This allows the system to identify each role as belonging to an individual school. Role groups are equal to Chancery SMS roles (not base roles).

GUID

A number that is generated by an application to create a unique identity for an entity, such as a user record.

Lightweight Directory Access Protocol (LDAP)

LDAP is a software protocol for enabling you to locate organizations, individuals, and other resources such as files and devices in a network.

Novell Directory Services (NDS)

Novell Directory Services is a centralized and standardized system that automates network management of user data, security, and distributed resources, and enables interoperation with other directories.

Role

A set of predefined access permissions, such as School Secretary or Teacher, that are used to grant users access within Chancery SMS. Users are provided with User Accounts that are based on a Role.

Organizational Unit (OU)

Organizational Units (OUs) are entities or containers used to arrange directory related data.

User Account

Each user account in the directory service requires a logon name. This logon name corresponds to Chancery SMS' user ID. This domain field is required for the user to be authenticated against the directory service.