



## **Active Directory and halFILE**

### HUG 2007 Conference

November 16, 2007

---

**Windows Active Directory is a powerful tool for maintaining network users across multiple servers and domains. This session explores halFILE's support of Active Directory to help determine if the feature benefits your organization.**

---

#### **What is halFILE Active Directory Integration?**

halFILE Active Directory integration is a feature where halFILE users are automatically logged into halFILE based on their network user id. Then the security privileges and restrictions for the user are defined based on the Windows Active Directory Groups he/she belongs.

#### **Why use Active Directory Integration?**

- Administer users from one place, Windows Active Directory.
- No halFILE security setup is required when a new employee is hired that needs to use halFILE. Set up the person's network user id, put him in the appropriate Active Directory Groups and he should be able to get into halFILE with the correct security.
- Easy to remove users when employee turnover occurs. If an employee leaves, you delete him from Windows Active Directory and he/she no longer has access to halFILE.
- Quickly change halFILE roles for users. If a user is promoted to a new job requiring different halFILE privileges, then move the user from one Active Directory Group to another and those privileges automatically flow over to halFILE security.

#### **halFILE Active Directory Integration Set Up Procedure**

1. Set up a Windows Active Directory Group for each type of User that you would have in halFILE. For example, if I have Search only users, Search and Index users and Admin users, I would set up 3 Active Directory Groups as follows:
  - a. HFAD\_User\_Search – for users with Search only privileges.
  - b. HFAD\_User\_Index – for users with Search and Index privileges.
  - c. HFAD\_User\_Admin – for users with Admin privileges.
2. Add the Network users into the appropriate HFAD\_User group(s).
3. Set up a Windows Active Directory Group for each type of Custom Search you require. For example, if you have a Custom Search for Public users and a second Custom Search profile for Employees, then you would set up the Active Directory Groups as follows:
  - a. HFAD\_Search\_Public
  - b. HFAD\_Search\_Employee

4. Add the Network users into the appropriate HFAD\_Search group(s).
5. Change halFILE to use Active Directory Integration. In the Administrator, this is under Tools-Options / Security/Versions tab. Check the “Use Active Directory Integration” box.  
  
Note: You must check the “Use halFILE Integrated Security” box to enable this check box.
6. Set up a single User and Custom Search in halFILE for each Windows Active Directory Group, using the same name as the Windows Active Directory Group. So using the above examples, set up users named HFAD\_User\_Search, HFAD\_User\_Index and HFAD\_User\_Admin. Set up all the features as needed including Extended Settings and Group/Document Level Security. Then, set up Custom Search Profiles named HFAD\_Search\_Public and HFAD\_Search\_Employee.
7. Now, when a user goes into halFILE, they are automatically assigned their Network user id. halFILE looks up the user id in the Windows Active Directory Groups to determine which groups the user belongs to. Then, the user’s profile for halFILE security is created for the user.

### **Behind the Scenes**

New tables in HFWParams are used to store the above information including:

ADUsers  
ADUserFeatures  
ADCustomSearch

When a user logs in, halFILE queries Windows Active Directory to determine which Active Directory Groups he/she belongs and dynamically builds the security system for that user in halFILE accordingly to the settings for matching Group names set up in halFILE.

### **Active Directory and e.halFILE**

e.halFILE supports the halFILE Active Directory Integration when Windows authentication is enabled on your website.