



# User Management Tool 1.5

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# User Management Tool 1.5



The User Management Tool enables you to provision employee user accounts and ShareFile distribution groups from Active Directory (AD). The tool matches accounts based on email address, links your existing ShareFile employee accounts to AD, and updates employee account information in ShareFile. You specify a schedule in the tool to automatically keep ShareFile in sync with AD changes.

**Important:** ShareFile recommends that you integrate your ShareFile account with a SAML Identity Provider such as the one provided with XenMobile or Active Directory Federation Services (ADFS). The User Management Tool is one of several user provisioning solutions provided by Citrix. The recommended best practice is to integrate ShareFile with Citrix XenMobile App Edition or XenMobile Enterprise Edition. XenMobile provides ShareFile with AD-based user account provisioning, single sign-on authentication of Worx Mobile App users, and comprehensive access control policies.

The App Controller Management Console, a component of XenMobile, enables you to perform ShareFile configuration and to monitor service levels and license usage. To get started, refer to the [XenMobile](#) documentation.

Provisioning user accounts with the User Management Tool enables users to log on to ShareFile with their AD credentials. By default users can continue to log on with their ShareFile credentials too. However, for most ShareFile Enterprise scenarios we recommend that you require users to log on with their AD credentials. To do that, when you configure your SAML identity provider in the ShareFile web interface (Admin > Single Sign-on), select the Require SSO Login check box. We also recommend that you disable password reset on the ShareFile user account.

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# About User Management Tool 1.5



## What's new

- The User Management Tool stores user account provisioning rules with your account information in the ShareFile cloud. You can install the tool on any machine and access your rules by logging in to your ShareFile account.
- You no longer need to specify an order for rule processing. Rules are always processed in the following order: (1) Rules that create and edit users; (2) rules that create and edit groups; (3) rules that disable users.
- You can choose a StorageZone and other user account settings for each rule.
- You can create multiple, named synchronization jobs in the User Management Tool. To create a job that uses advanced configuration such as triggers, actions, or conditions, continue to use Task Scheduler.
- You can configure a proxy configuration for the User Management Tool connection to ShareFile.

## Known issues

- The User Management Tool cannot run a job that includes a space in the job name. To work around this issue, do not use spaces in job names. [#17230]

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# System requirements for User Management Tool 1.5



Supported operating systems:

- Windows Server 2012
- Windows Server 2008
- Windows 8
- Windows 7

Requirements:

- .NET Framework 4.5
- Minimum monitor resolution of 1024 x 768.
- Available employee user licenses for each new user account to be added by the User Management Tool

## ShareFile administrative permissions

- Required: Allow this user to configure single sign-on settings
- Required to create users: Allow this user to manage employee users  
**Note:** Although not directly required by the User Management Tool, the permission "Allow this user to manage client users" is a prerequisite for the permission "Allow this user to manage employee users."
- Required to create groups: Allow this user to edit shared distribution groups
- Required to set a zone for a user: Allow employee to select storage zone for root-level folders

## Active Directory accounts

Active Directory accounts must have these required attributes:

## System requirements

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- Email Address
- First Name
- Last Name

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# Install the User Management Tool and configure a test synchronization

The User Management Tool stores account provisioning rules with your account information in the ShareFile cloud. You can install the tool on any machine and access your rules by logging in to your ShareFile account. For security reasons, the credentials needed to run the User Management Tool are stored on your local machine.

Verify that your environment meets the [system requirements](#) before installing the tool.

1. In AD, create a test group containing a few users that already have ShareFile employee accounts. If that is not possible, identify an AD Organizational Unit (OU) that you can use for testing.
2. From the ShareFile download page at MyCitrix.com, download the User Management Tool installer to a server that is in the AD domain.

If you do not plan to schedule synchronization, you can install the tool on a workstation instead.

3. Follow the prompts to complete the installation.

A shortcut for the tool is placed on the Start menu and your desktop.

4. Start the User Management Tool. The User Management Tool log on page appears.
5. Enter the ShareFile account information and then click Log on.

Account URL is your ShareFile account URL, in the form `https://mysubdomain.sharefile.com` or, in Europe, `https://mysubdomain.sharefile.eu`.

The User Management Tool window appears.

6. If you need to configure a proxy server, click the options icon and then click Configure Proxy.
7. Based on the test group or OU that you identified in step 1, click either the Groups tab or the Users tab, click the test group or OU, and then click Add Rule.
  - If you clicked the Groups tab: In the Edit Groups Rule dialog box, select the check boxes for Create a ShareFile distribution group... and Update the ShareFile distribution group... to create and update new employee accounts and distribution groups. Then review and update the options that appear, as needed.
  - If you clicked the Users tab: In the Edit Users Rule dialog box, review and update the options as needed.
8. Click the Rules tab and then click Simulate Active. The changes that will occur when the rules are run appear in the Actions area. If no changes are listed, the rules you applied did not result in new user accounts or groups.



9. Schedule the AD synchronization: Click Schedule and then use the Save Job dialog box to create a named job and specify a synchronization schedule.
10. After the scheduled synchronization, log on to the ShareFile interface and verify that the accounts are created.

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# Upgrade the User Management Tool

**Note:** When you upgrade from a version of the User Management Tool that is earlier than release 1.5, existing rules are moved to the ShareFile cloud.

Verify that your environment meets the [system requirements](#) before upgrading the tool.

1. From the ShareFile download page at MyCitrix.com, download the latest User Management Tool installer to a server that is in the AD domain.
2. Follow the prompts to complete the installation.

A shortcut for the tool is placed on the Start menu and your desktop.

3. Start the User Management Tool. The User Management Tool log on page appears.
4. Enter the ShareFile account information and then click Log on.

Account URL is your ShareFile account URL, in the form `https://mysubdomain.sharefile.com` or, in Europe, `https://mysubdomain.sharefile.eu`.

The User Management Tool window appears.

5. If you need to configure a proxy server, click the options icon and then click Configure Proxy.

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# Provision user accounts and distribution groups


You provision user accounts by choosing AD Organizational Units (OUs). The User Management Tool matches accounts based on email address and adds or updates employee account information in ShareFile.

When you add a distribution group and choose to create employee accounts, users accounts are linked to AD only if those users already have a ShareFile employee account. If an employee user is not in ShareFile, they do not appear in the distribution group created using the User Management Tool.

When ShareFile synchronizes with AD, ShareFile uses logon names and email addresses to validate employee accounts against AD. AD groups synced with ShareFile through the User Management Tool will sync as a distribution group in ShareFile.

1. Log on to the User Management Tool.

A shortcut for the tool is on the Windows Start menu. The tool is installed in C:\Program Files\ShareFile\umt.exe.

The connected subdomain appears on the Dashboard. To connect to a different subdomain, click .

2. To add users from AD:

- a. Click the Users tab.

Your AD Organizational Units (OUs) appear.

- b. Click one or more objects and then click Add Rule.
- c. In the Edit Users Rule dialog box, review and update the options as needed.

The settings are applied when a new account is created.

3. To add distribution groups from AD:

- a. Click the Groups tab.
- b. Click one or more groups and then click Add Rule.

The Edit Groups Rule dialog box opens.

- c. To create and update new employee accounts and distribution groups, select the check boxes for Create a ShareFile distribution group... and Update the ShareFile distribution group....

If you choose to create employee accounts and a user in an AD group already has a ShareFile employee account, the account is linked to AD.

d. In the Edit Users Rule dialog box, review and update those options as needed.

4. To apply the added rules:

a. Click the Rules tab.

- The Rules area lists all added rules.
- The Desired Users or Desired Groups area lists the users or groups to be added by the selected rule.
- The Actions area shows the results of the applied rules.

b. To manage rules:

- To make a rule active or inactive, click a calendar icon. The calendar icon for an inactive rule is dimmed.
- To delete a rule, select it and click Delete.
- To view the user accounts or groups to be added by a rule, select the rule. The information to be added appears in the Desired Users or Desired Groups area.

c. To preview the results of all active rules, click Simulate Active.

The changes that will occur when the rules are run appear in the Actions area. If no changes are listed, the rules you applied did not result in new user accounts or groups. Click a user to view details provided from AD.

d. To immediately apply the active rules, click Commit Now.

To ensure that ShareFile is kept up-to-date with AD changes, specify a synchronization schedule.

5. To schedule AD synchronization for all active rules, click Schedule and use the Save Job dialog box to create a named job and specify a synchronization schedule.

Jobs are stored in %ProgramData%\Citrix\ShareFile\UserManagementTool\Jobs.

To specify advanced scheduling features such as triggers and conditions, specify a Schedule of Manual and then use Windows Task Scheduler.

6. To view recent activity and synchronization results, click the Dashboard tab.