

Migrating Laserfiche Repository Users and Forms Participants to Laserfiche Directory Server 10.4

White Paper

Laserfiche®

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Introduction

Laserfiche Directory Server is a centralized system for managing user accounts across different Laserfiche application servers. Repository named users that are allocated to a specific repository in a Laserfiche Server can use their accounts for that repository only. This makes it hard for administrators to manage those users' access to other Laserfiche servers or repositories. The Laserfiche Account Migration Tool allows you to migrate repository named users to Laserfiche Directory Server 10.4, so that all users can be managed from one location.

If you are changing the Forms authentication method from Laserfiche Server to Laserfiche Directory Server, this tool also lets you migrate Forms users to Directory Server. Previously, you would have had to recreate and re-license users after changing the Forms authentication method.

While the migration tool focuses on migrating users from Laserfiche Server to Laserfiche Directory Server, we also provide guidance on how to perform this migration in conjunction with a [conversion of Forms 10.3 participants to Directory Server users with participant licenses](#).

Migrating Different Types of Users

Laserfiche Repository Users

- The migration tool will migrate all Laserfiche repository users.

Note: The Laserfiche Account Migration Tool supports migration of Avante repository to any Laserfiche Directory Server site. Migration of Rio repository to the same Directory Server site is also supported. However, if Rio repository is migrated to a *different* Directory Server site, there may be a SID conflict. This occurs due to the new Directory Server having no knowledge of the old Directory Server.

- Laserfiche groups will also be migrated.
- Some types of users cannot be migrated using this tool.
 - Built-in system users will not be migrated.
 - Unlicensed accounts will not be migrated.
- If any Laserfiche user accounts are linked to Windows accounts, the links will be lost if you use this tool to migrate those accounts. As an alternative, you can convert those Laserfiche accounts into Windows accounts using the [Laserfiche Account Conversion Utility](#), then manually license those Windows accounts in Directory Server.

- If any repository users have the **Temporary password expires after __ hours** setting enabled in Laserfiche Server, then the **Lock account in __ hours** setting check-box will not be checked after migration to Laserfiche Directory Server 10.4.

Identity Provider Users

Users from identity providers include Windows or LDAP or SAML accounts. The tool does not migrate these users. The administrator will have to re-license these users in Directory Server.

Forms Authenticated Participants

If you have [Forms participants](#) who were registered as participants in Forms 10.3 or earlier, you may want to migrate them to become Directory Server users with participant licenses. This can be done separately within Forms and the Directory Server, without running the migration tool described in this paper. However, if you are planning to migrate participant users (from Forms 10.3 or earlier) to Directory Server as part of a general Laserfiche Server to Directory Server migration process, we recommend the following order of operations:

To migrate Forms participants to LDAP users in Directory Server with participant licenses:

1. Create the LDAP users in Directory Server corresponding to the Forms participants. Assign participant licenses to them.
2. Run the migration tool described in this paper.

On the Forms [configuration page](#), change the authentication method for Forms to Directory Server. If the option to enable Directory Server authentication is not available, you may have to [change an option in the Forms database](#).

To migrate Forms participants to Active Directory users in Directory Server with participant licenses:

1. Create the Active Directory users in Directory Server corresponding to the Forms participants. Assign participant licenses to them.
2. Run the migration tool described in this paper.
3. On the Forms [administration page](#), navigate to the **Participants** tab of the **System Security** page.
4. Select **Configure LDAP**.
5. Select **Retain Active Directory SIDs**.
6. Select **Verify and save**, then select **Yes** on the confirmation prompt.
7. Confirm that the migration has completed, using one of the following methods:
 - Open the Windows Event Viewer. Expand the **Applications and Services Logs** node, then the following nested nodes: The **Laserfiche** node, the

- Forms** node, and the **App** node. Select the **Operational** node and check that the log has the message "LDAP participant migration ended".
- Alternatively, in the Forms database, look in the cf_options table and ensure that the value of "LdapMigrationStatus" is 5.
8. On the Forms [configuration page](#), change the authentication method for Forms to Directory Server. If the option to enable Directory Server authentication is not available, you may have to [change an option in the Forms database](#).

Migrating participant users in this way ensures that the migrated participants will retain their process histories and currently assigned tasks.

Note: The migration described above, from Forms participants to Active Directory users in Directory Server, applies only to Forms participants that were added to a version of Forms before 10.4. For participants added in Forms 10.4 or later, the Active Directory SIDs will be retained by default, so no explicit migration is required.

Preparing for the Migration

Before you run the migration tool, ensure that the following prerequisites are met.

- The account running the tool must belong to the Administrators group in Windows.
- The tool must be run on the computer hosting the Laserfiche Server.
- To guard against data loss, back up your Directory Server database, Laserfiche Server named user database, Laserfiche Server repository database, and Laserfiche Forms database.
 - The Laserfiche Server named user database file is named **lfsnu.db** and located in the Laserfiche Server installation folder (**C:\Program Files\Laserfiche\Server** by default).
- Stop the Laserfiche Server service before running the tool.
- Ensure that the Directory Server service is running and has a valid master license.
- If any repository groups contain LDAP or Windows users, ensure that the identity providers for those users already exist in Directory Server. This ensures that repository groups containing LDAP or Windows users will still contain those users after the groups are migrated to Directory Server.
- Ensure that the account running the tool has read and write access to the Laserfiche Server database.
- Ensure that nobody will attempt to modify Laserfiche Server or Directory Server accounts during the migration.

- At the end of the migration process, there must still be at least one account with **Manage Trustee** and **Set Trustee Privileges** permissions that remains behind as a named user. Ensure that you have one such account that meets these conditions and does not need to be migrated. There is a step in the migration tool that allows you to select which user(s) to leave behind.
- The tool allows you to migrate Forms users to a Directory Server authentication system if those users were formerly authenticating to Forms using Laserfiche Server. The tool can be used to facilitate transitioning from Laserfiche Server authentication to Directory Server authentication for your Forms Server. For best results, the transition should occur in the following order:
 1. [Change the Forms authentication method](#) to use Directory Server. If the option to enable Directory Server authentication is not available, you may have to [change an option in the Forms database](#).
 2. Migrate Forms accounts using this tool.

Making the Migration

After carrying out the preparatory steps, carry out the migration as follows.

1. Open the migration tool. Click **Accept** on the first page.
 2. If you have any uncompleted migrations, you will be taken to the **Resume** page. You can continue working on a previous migration by selecting it and clicking **Resume**. To start a new migration, click **Start new**.
 3. Select the database type. Specify the database server, database name, and authentication details for the database server. Click **Connect**. If the connection is successful, click **Next**.
 4. Enter the name of your Laserfiche Directory Server and select whether to use SSL to connect to it. Click **Connect**.
 5. If the connection is successful, you will be able to select your Laserfiche Directory Server database and enter authentication information. Select the database from the dropdown menu. Select **Use Windows credentials** if you want to connect to the database using your Windows account. If this is not selected, enter your **Sign-in organization**, **Username**, and **Password** for connecting to the database server. Click **Sign in**.
 6. Select the target organization to migrate users to. Click **Next**.
 7. Select which account(s) with administrative permissions will remain in Laserfiche Server without being migrated. Click **Next**.
 8. The next step lets you choose what will happen if there are name conflicts between existing users or groups in Directory Server and users or groups you are trying to migrate from Laserfiche Server.
 - a. For users, select **Merge** if you want the named user to be merged with the existing Directory Server user. Select **Rename** if you want the named user to be renamed to something else, and enter the user's new name under **New name**.
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- Note:** Make sure that the new name you enter does not already exist in Directory Server. If the new name you enter is also a duplicate, that user account will not be migrated.
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- b. For groups, you must rename any groups that share a name with existing Directory Server groups. Enter a new name for the group under **New name**.
 9. Click **Start migration**.
 10. The results of your migration will be displayed. To continue with a Forms account migration, click **Next**.

11. On the Forms migration page, enter the Forms Server name, the Forms database name, and the credentials for authenticating to that database. You can migrate accounts on additional Forms servers by clicking **Add database** and entering the above information for each additional server. Click **Connect** when you are done adding Forms Servers.
12. If the connection is successful, click **Next**.
13. Click **Start** to start the migration of Forms users. When the migration is done, click **Exit**.



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Description:

This paper describes how to use the Laserfiche account migration tool to move repository user accounts from Laserfiche Server to Laserfiche Directory Server. It also describes how to migrate Forms participant users to become Directory Servers users with participant licenses, and how to convert Forms users authenticating through Laserfiche Server into Directory Server accounts without losing the users' active processes.

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