How to set up an LDAP Sync

An **LDAP Sync** imports users from Active Directory (or another LDAP directory) and keeps their details up to date on a schedule: their name, email address, PIN, card number, phone extension and department. Users placed in the right department inherit its settings, such as Rules, account access and billing.

Create the sync

1. Open Resource Manager.
2. In the tree, click **Scheduled Tasks** > **LDAP Sync**, then click **Add**.
3. Enter a **Scheduled Task Name**, for example *Staff accounts*, and choose the PDServer to run it in **Execute on PDServer**.
4. On the **Schedule** tab, choose how often it runs. **Daily** is the default; **Hourly** keeps user details more up to date. For a daily sync, set the **Execute time**.

Import settings

On the **LDAP Sync Settings** tab, click the **Import Settings** tab:

- **Server or domain name:** the domain name, a domain controller's host name, or its IP address. Tick **Use SSL** to connect securely, and untick **Default port** to use another **Port**.
- **Don't import disabled users:** leaves out disabled accounts.
- **Import from the following containers:** click **Add**, and tick the domain (to import from all of it) or the OUs to import from.
- **Import from all sub-OUs:** also imports users in OUs inside those containers. When this is ticked, do not tick an OU that is inside another ticked OU.
- **Run delete routine after import:** deletes users that this sync imported before but no longer finds, if their user record allows it (**If created by a sync, delete if no longer found in the same sync**, on the user's **Advanced** tab).

Place users in departments

On the **Department Mapping** tab:

- **Map Department to:** what decides a user's department: **Organisational Unit (OU)** (the default), **AD Security Group**, an attribute (**Attribute - Department**, **Attribute - Division** or **Attribute - Company**), or **Custom**.
- With OU mapping, choose which parent OU names the department. For example, if users sit in *Staff* inside *CallCentre*, map to the parent OU 2 levels from **User side** so the department is *CallCentre*.
- **Auto-create unmatched Departments:** creates a department that does not exist yet. Otherwise, users whose department does not exist go into the department chosen below it.

Map user attributes

On the **Map User Attributes** tab, tick each field to import, and enter the attribute it comes from in square brackets. For example, **Map user name** defaults to *[cn]*; *[givenName] [sn]* imports the first name and surname with a space between. The fields are used for:

- **Email address:** used for scan to email at the printer, emails from Resource Manager (for example the user's PIN), Rule violation emails, resetting a PIN or password from the PDAgent client, and the welcome email.
- **Controller ID (PIN):** used to log in to printers with a PIN, and to the PDAgent client where it is set to PIN login.
- **Card number:** used to log in to printers with a card.
- **User account code:** only needed for users who choose accounts in a billing popup, if their user account code must differ from their login name. If not mapped, the login name is used.
- **Tel extension** (and **PBX name**): assigns the user's phone extension, so their calls are charged to them and call popups reach them.
- **PBX PIN:** the PIN the user dials before calls, where calls are charged by PIN.
- **Home folder:** adds a scan to home button on Konica Minolta printers set up for scan to home.
- **Secondary login name:** a second user name (for example an admin account) whose jobs are matched to the same user.

For extensions, choose the PBX to create new extensions on in **Create Ext on PBX**, or **Map PBX to attribute** if each user's PBX name is in an attribute.

Import only members of certain groups (optional)

1. Click the **Group Filters, Rules and Workflows** tab, then click **Download all groups** (or **Download with filter** to download only some).
2. Select a group (or several), click **Edit**, and set its **Membership requirement**:
   - **no requirement:** the group is not used to choose users.
   - **required membership:** users must be members of this group.
   - **exclude if member:** members of this group are not imported.
   - **require membership of at least one:** users must be members of at least one of the groups set to this.
3. Click **OK**.

For example, to import members of *Europe* who are in *Directors* or *Middle management* but not in *Remote workers*: set *Europe* to **required membership**, *Directors* and *Middle management* to **require membership of at least one**, and *Remote workers* to **exclude if member**.

The same tab can assign Rules by group membership (see *How to assign Rules to users based on LDAP group membership*).

After user created actions

On the **After user created actions** tab, choose what happens when the sync creates a new user, so they can log in to the printers straight away:

- **Auto create PIN:** creates a PIN if the PIN is not mapped, or the user's value is empty. Its length is set in **Tools** > **System Configuration**, on the **General** tab, in **Auto PIN length**.
- **Send welcome email:** sends the new user an email from the template you choose, for example with their PIN and how to release jobs at a printer.

Test the settings

Click **Test Settings**. It shows the users that would be imported, with their mapped values and departments, without changing anything. Change the settings and test again until they are right, then click **OK**.

The test runs as the account you are logged in to Windows with. The real sync runs on the PDServer, so test that too (below).

Run the sync on the PDServer

1. In the tree, click **Scheduled Tasks** > **LDAP Sync**.
2. Right-click the sync and click **Execute now**. Resource Manager asks the PDServer to run it straight away.
3. After a minute or two, click **View** > **Refresh** and check the **Last message** column: it shows how many users were imported, created and deleted, or an error.

If the sync fails with an access error

The PDServer service runs as the local **SYSTEM** account. That is enough for its other work, but SYSTEM may not be allowed to read Active Directory, unless the PDServer is on a domain controller. If the sync fails, for example with *The server is not operational*, run the PDServer service as a domain account:

1. Create a domain account for it. It only needs to be in **Domain Users**, but its password must never expire, and it must be added to the local **Administrators** group on the PDServer.
2. On the PDServer, open **Services**, and double-click **PDServer**.
3. On the **Log On** tab, choose **This account**, click **Browse**, find the account, and enter its password twice.
4. Click **OK**, and restart the **PDServer** service.

Related articles

- *How to set up a Microsoft Entra ID Sync*
- *How to assign Rules to users based on LDAP group membership*
- *How to manually create a Department*
- *How to manually create a User*

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