ORGANIZATION CLIENT PORTAL USER GUIDE

Updated: July 10, 2022

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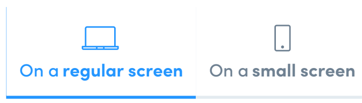
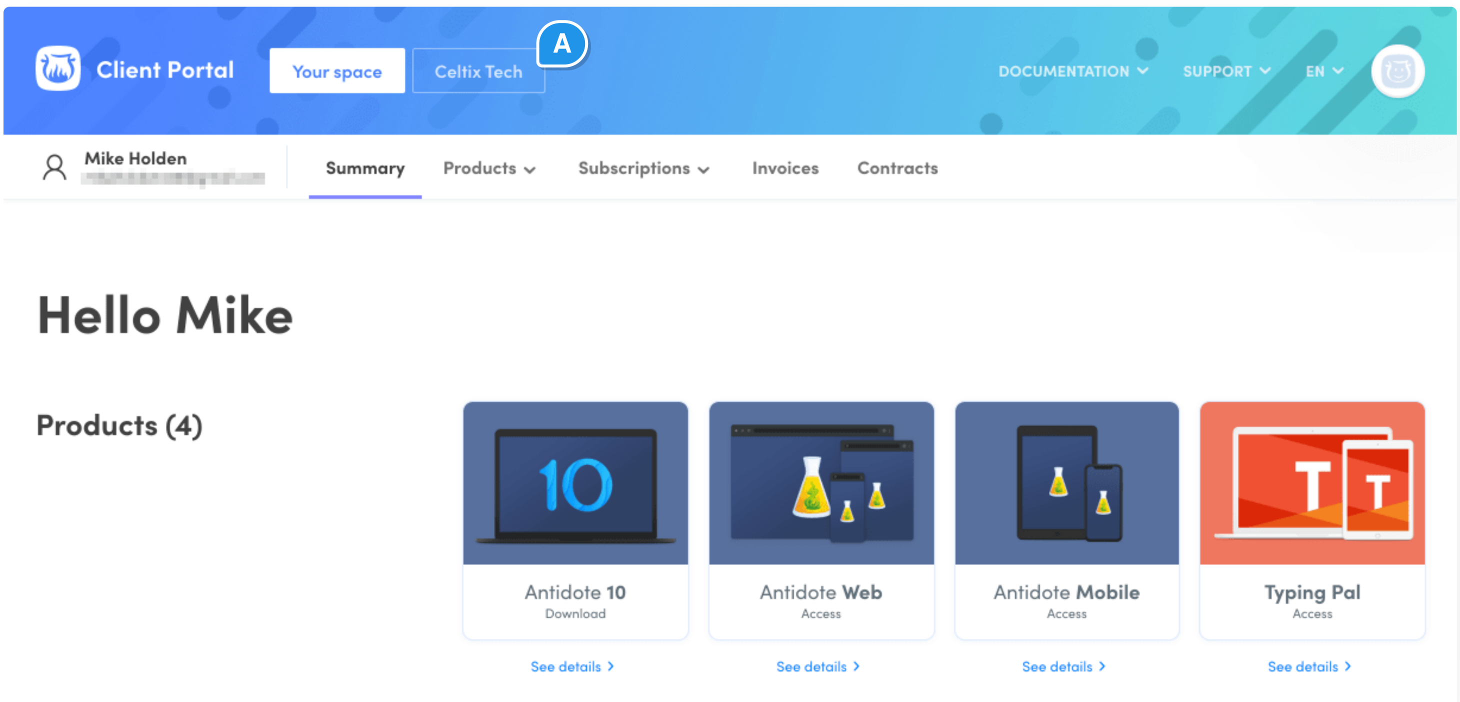
1 ACCESSING THE ORGANIZATION CLIENT PORTAL

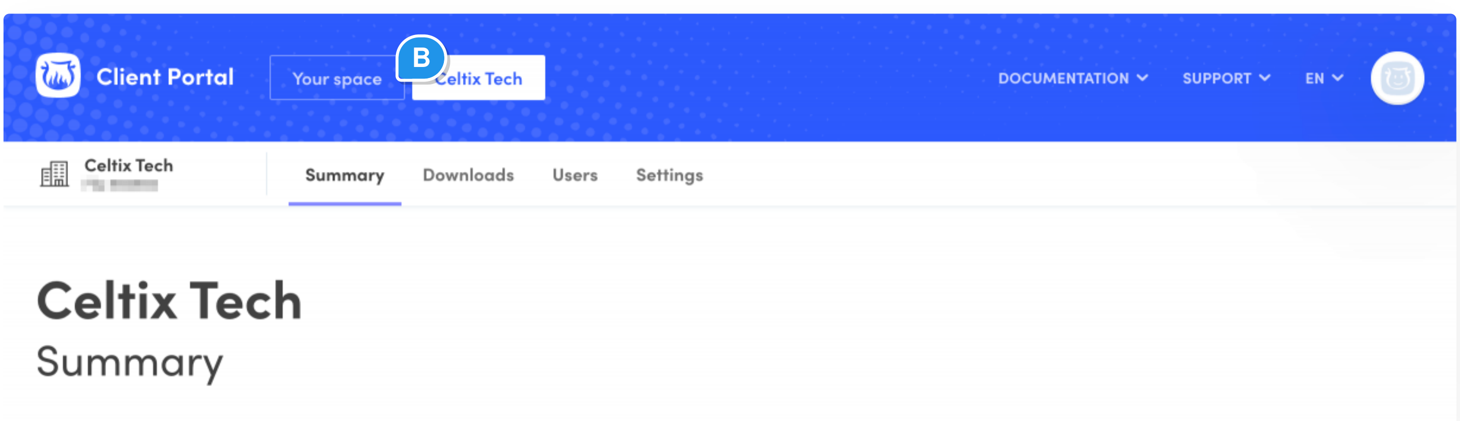
Like the Personal Client Portal, the Organization Client Portal is a powerful control centre with essential information about products, licenses, users, and various account settings for your organization.

The Organization Client Portal will appear if you have at least one multi-user license or a subscription to Antidote Web.



Use the buttons (A, B) located in the top left of the window to move between your Personal and Organization Client Portals. Click on the name of your organization to access the Organization Client Portal.



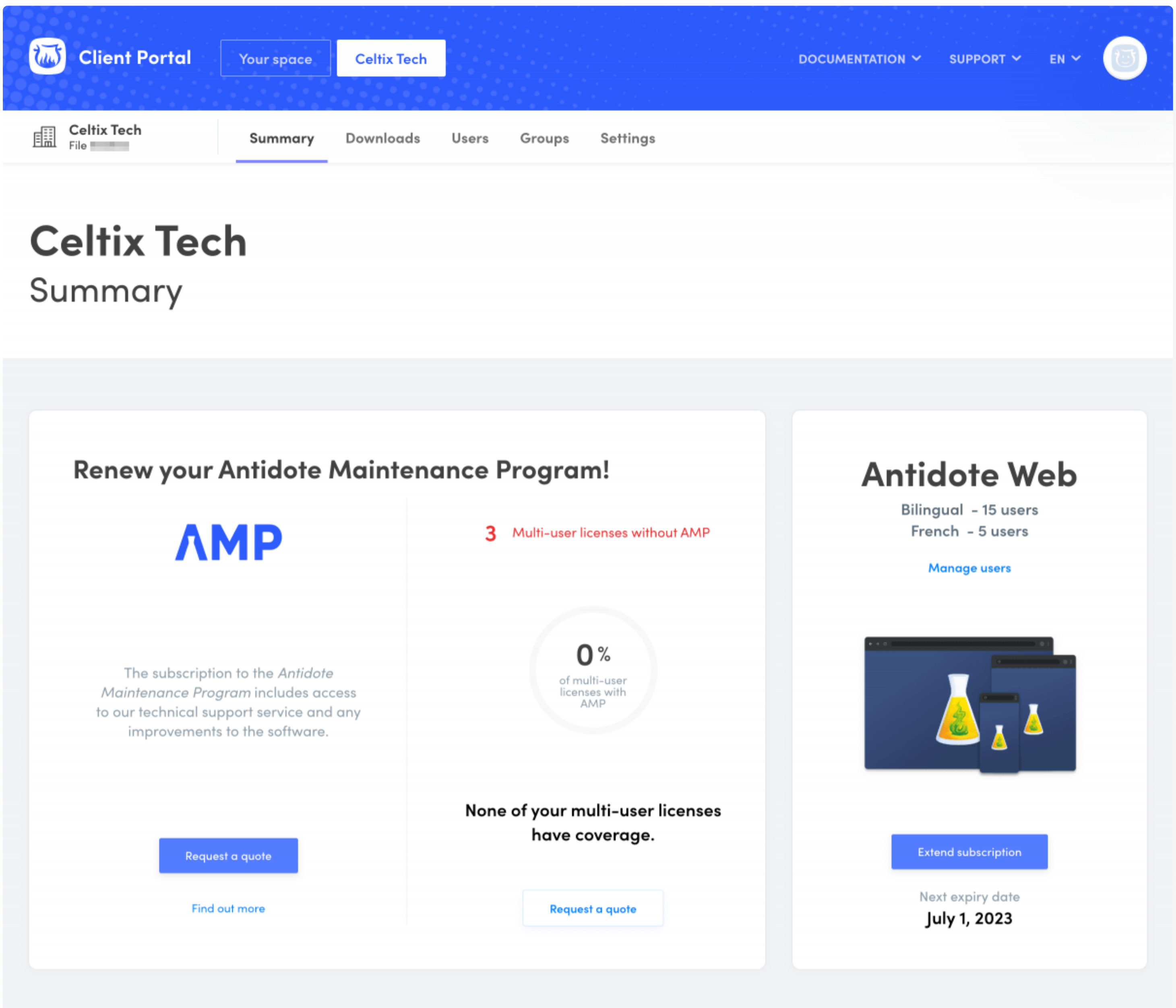


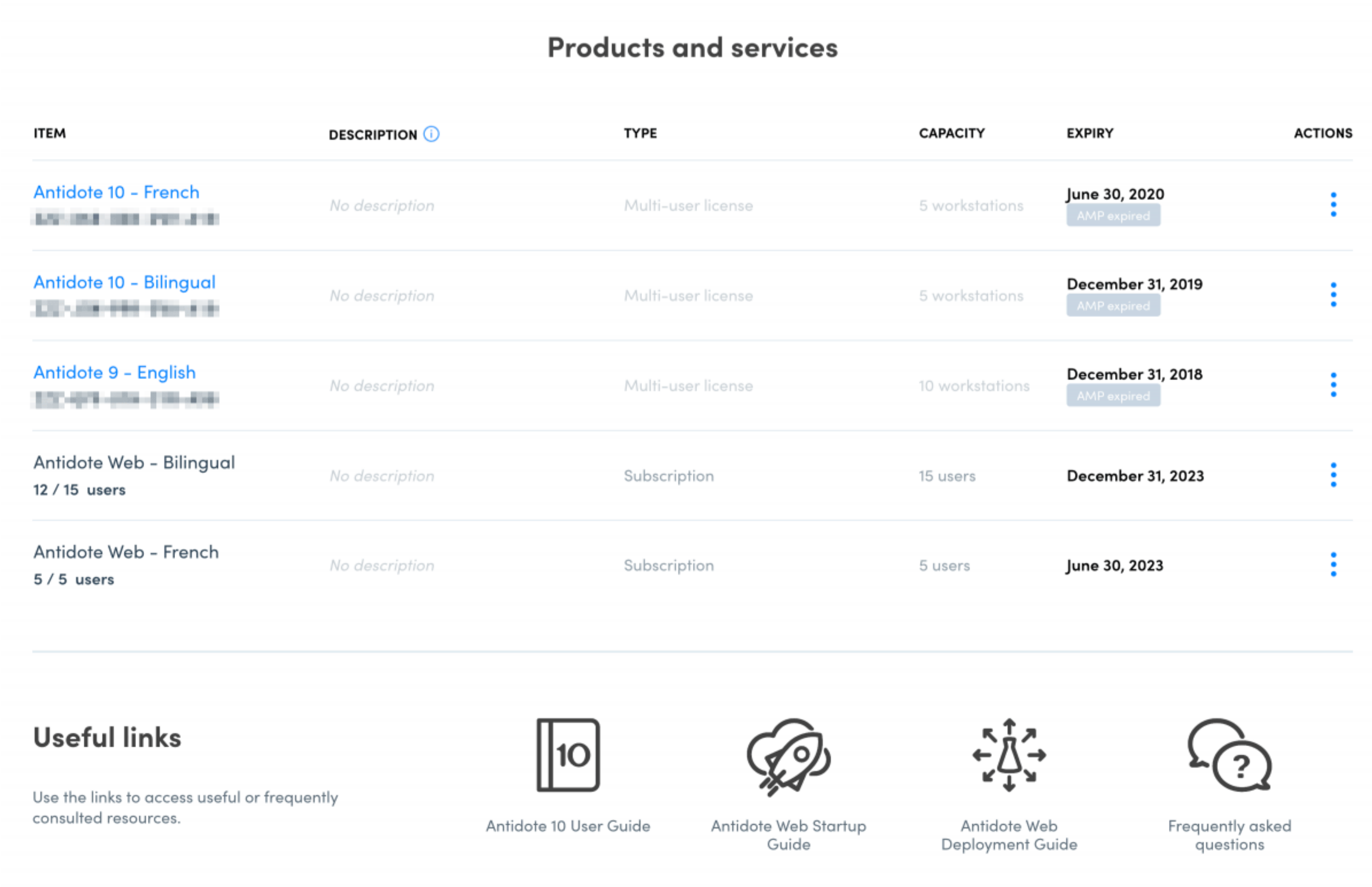
2 SUMMARY

The Organization Client Portal automatically brings you to the**Summary** tab.

This page displays the following:

- tiles containing essential information about your organization's multi-user licenses and subscriptions for Antidote Web and the Antidote Maintenance Program (AMP)
- buttons to extend an Antidote Web subscription or renew the AMP (requests a quote)
- a list of your Antidote multi-user licenses and subscriptions
- helpful documentation links

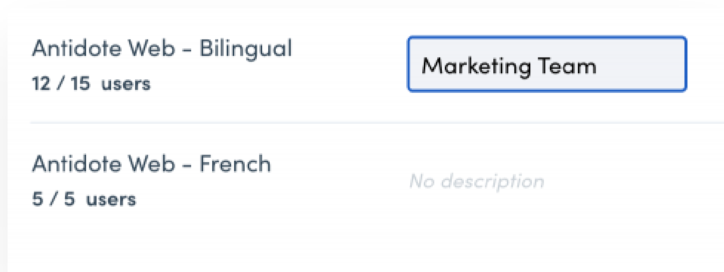




LIST OF PRODUCTS AND SERVICES

Description

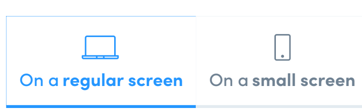
If you have more than one multi-user license or subscription, click on the greyed-out *No description* to add a short text in order to indicate the administrative unit linked to the license, for example.

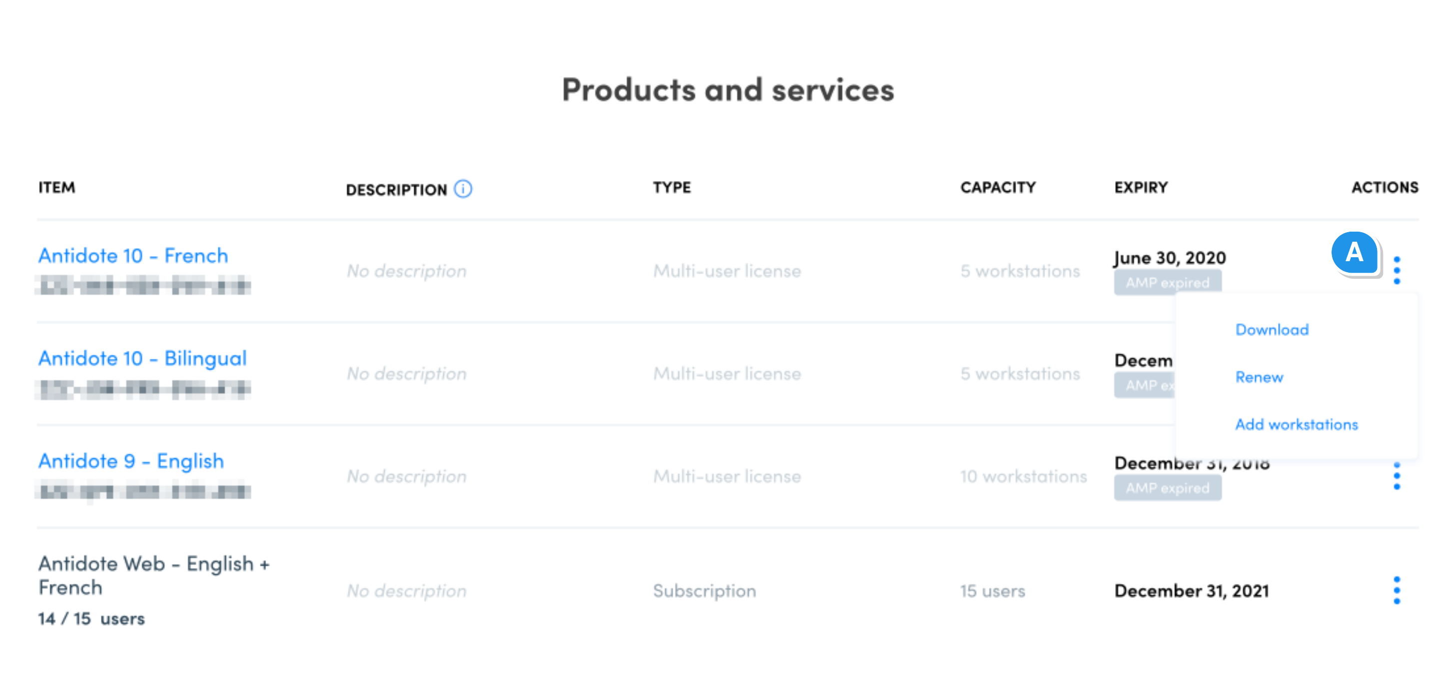


Actions button

For each license, you have an actions button that consists of three vertical dots (A). Click on it to **Download** software, **Renew** the AMP or **Add workstations** to your license.

For a subscription, the button allows you to **Manage users**.




Products and services
ITEM
DESCRIPTION
TYPE
CAPACITY
EXPIRY
ACTIONS
Antidote 10 – French
No description
Multi-user license
5 workstations
June 30, 2020
AMP expired
A
Download
Renew
Add workstations
Antidote 10 – Bilingual
No description
Multi-user license
5 workstations
Decem
Antidote 9 – English
No description
Multi-user license
10 workstations
December 31, 2018
AMP expired
Antidote Web – English + French
14 / 15 users
No description
Subscription
15 users
December 31, 2021

3 DOWNLOADS

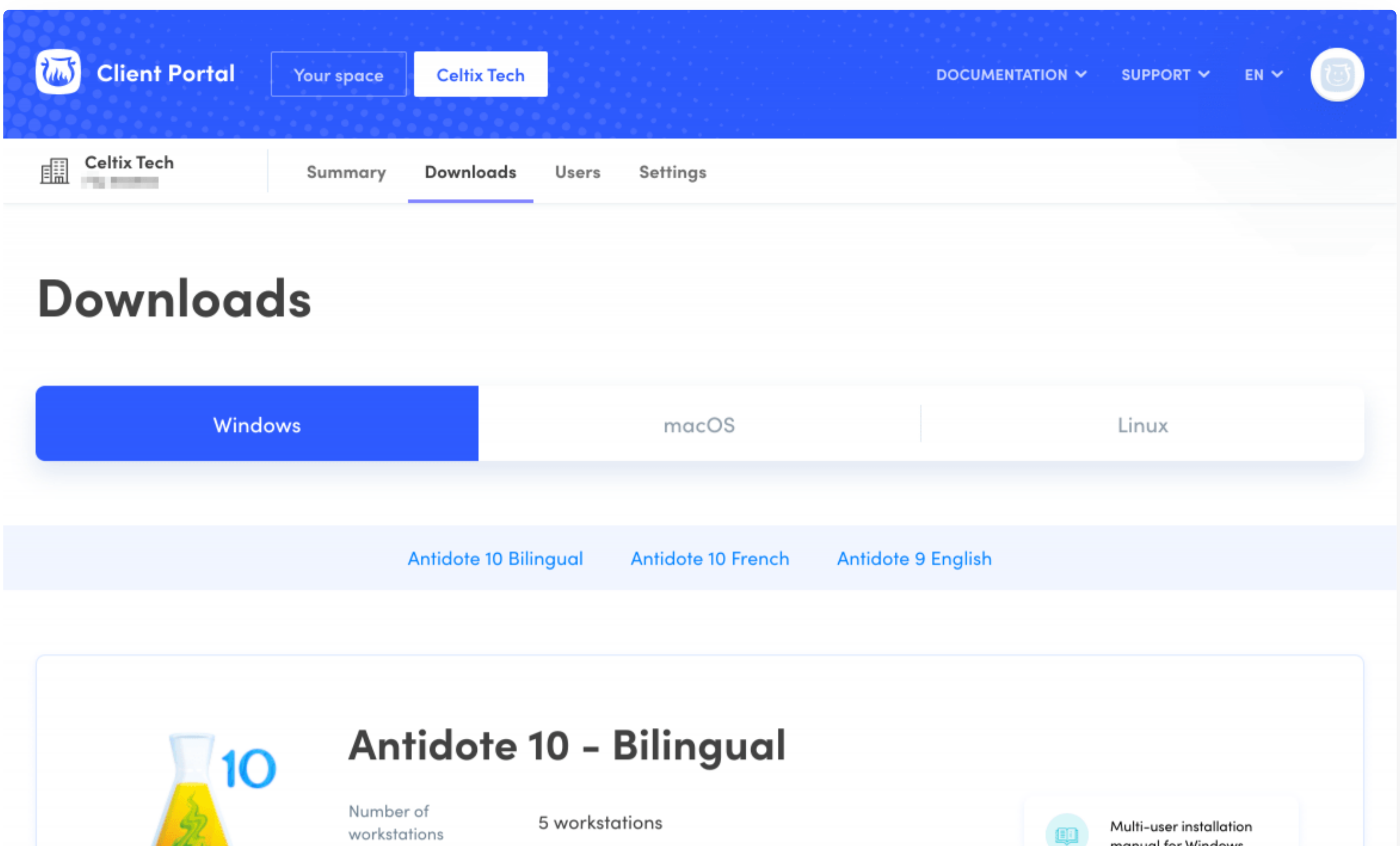
The **Downloads** tab has all the files needed to install Antidote, in accordance with your multi-user license.

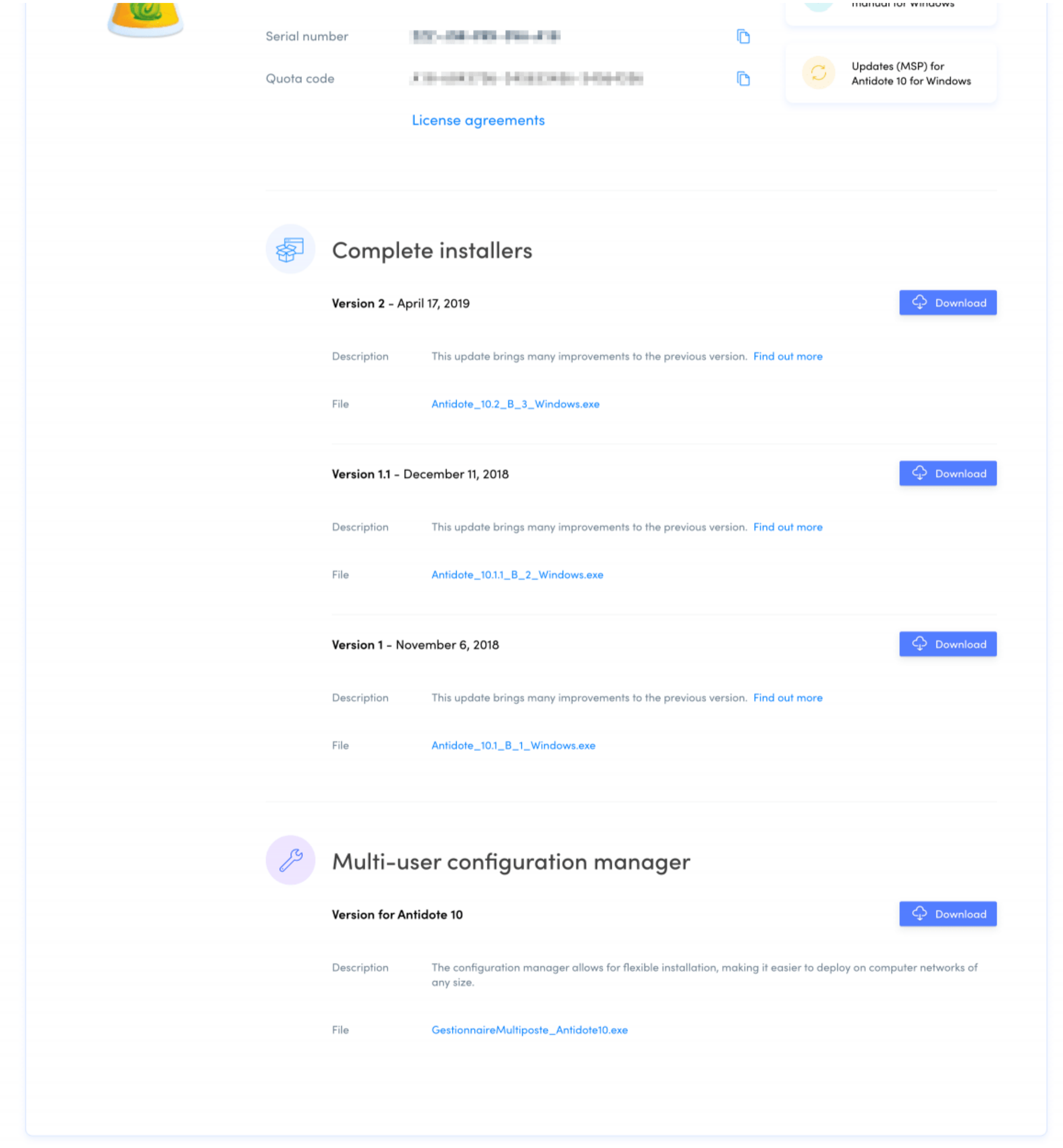
Each license displays:

- number of workstations included
- license serial number
- quota code
- license conventions and the Antidote Maintenance Program (AMP), as needed
- documentation links for multi-user deployment on Windows
- complete installers
- configuration manager for Windows

> **Note** — For as long as it is valid, the AMP gives you access to installers for all the versions of an edition of Antidote.

The files to be downloaded are organized by operating system in three separate sections (Windows, macOS and Linux*).



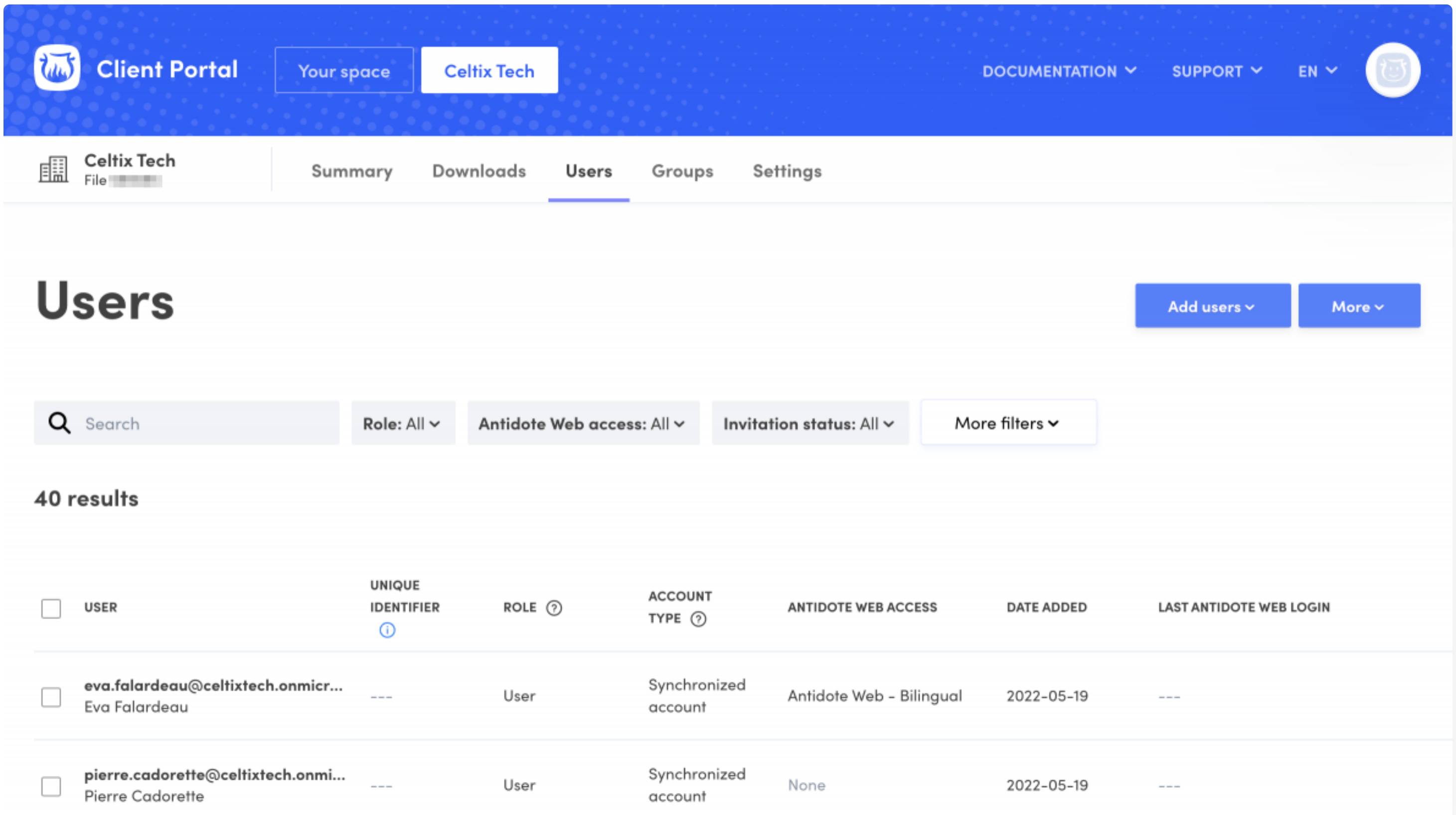


* Linux has no native version for Antidote 11. Compatibility is now ensured through the combination of the native Connectix for Linux and Antidote Web.

Learn more.

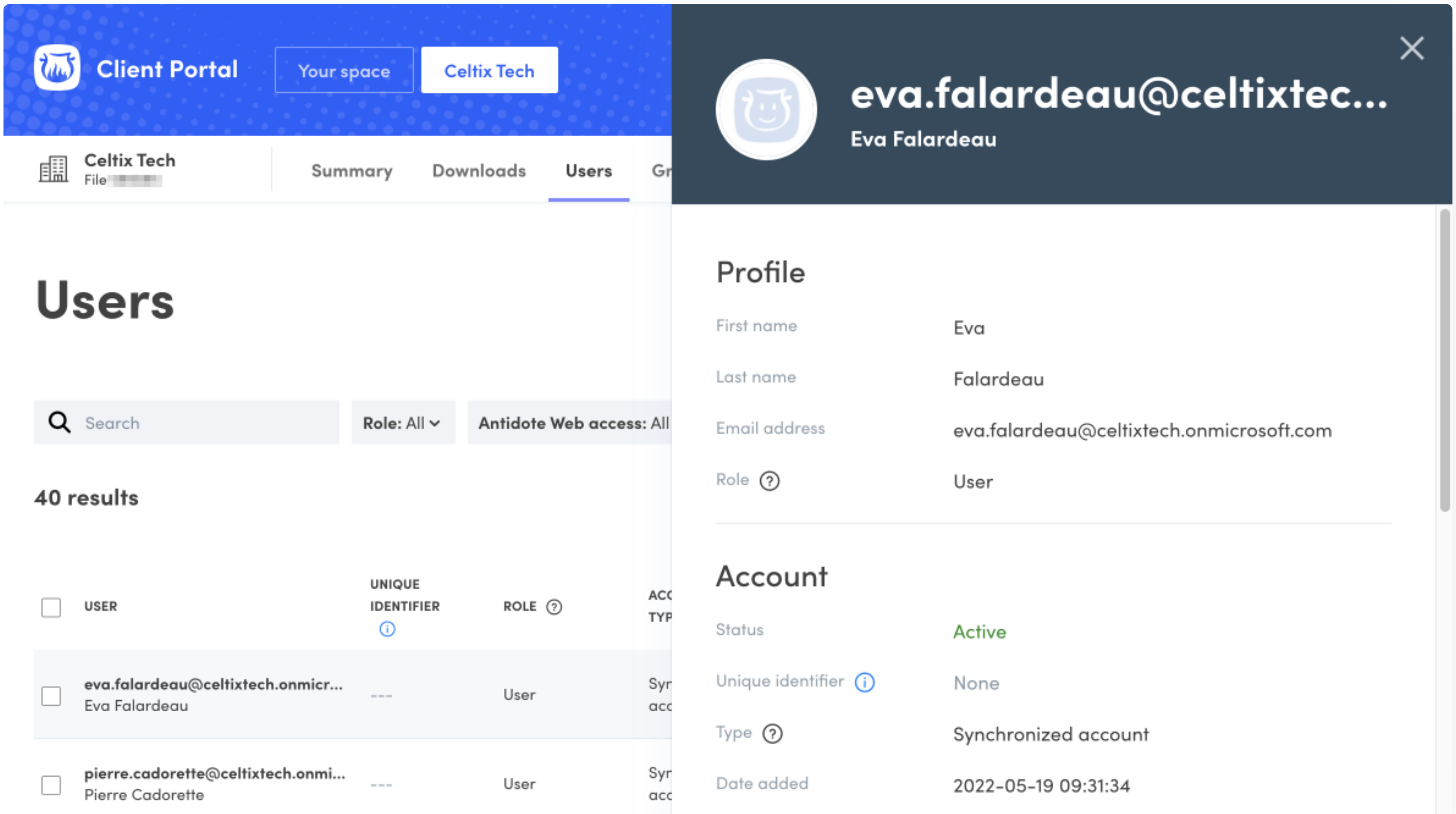
4 USERS

The **Users** tab displays all accounts linked to your organization. You may also create and manage the organization's user accounts.



USER FORM

Click on the line in the list for details about a specific account. A section with information about the user's profile, account, Antidote Web access, and associated groups will appear.



This chapter lays out the information you need to know about user accounts:

- the three roles that can be assigned to a user (administrator, technician, user)
- the three types of accounts (organization, personal, synchronized)
- the many ways of creating new accounts
- the functions for account management
- the update by import procedure

USER ROLES

Users can be assigned one of three roles for a subscription to Antidote Web, and one of two for an Antidote multi-user license.

ADMINISTRATOR

Administrators have access to the full version of the Organization Client Portal and have full management privileges. A single organization can have multiple administrators.

TECHNICIAN

Technicians have access to the full version of the Organization Client Portal, but they cannot add other technicians or create administrators.

USER (ANTIDOTE WEB ONLY)

The basic user has access to a simplified version of the Organization Client Portal where they can find their personal settings, and a link to Antidote Web if they have been granted access to it.

> **Note** – It is not possible to assign the user role under a multi-user license, because the license is granted to computer stations and not to people. Only administrator and technician roles, which allow account management and access to installers, are available.

Privileges	Administrator	Technician	User (Basic) Antidote Web only
Manage and create administrator accounts	✓		
Manage and create technician accounts	✓		
Manage and create user accounts	✓	✓	
Grant access to Antidote Web, if applicable	✓	✓	
Download multi-user Antidote installers, if applicable	✓	✓	
Access information about multi-user licenses, if applicable	✓	✓	
Access to documentation	✓	✓	✓
Subscribe or unsubscribe to Druide’s newsletter	✓	✓	✓

ACCOUNT TYPES

Three types of accounts are in the Organization Client Portal:

- organizational account
- personal account
- synchronized account (beta)

Organization accounts

Organizations can create accounts for basic users, technicians and administrators (seeUser Roles.) If the domain name or subdomain in email addresses matches those that Druide has on file for the organization, the accounts and subscriptions associated with them will be linked to the organization.

Users with organization accounts can access Antidote Web, but they cannot edit their own personal information (name, address, etc.) or make purchases in Druide's online stores. They will not receive any commercial correspondence from Druide relating to Antidote Web.

> **Note** — The organization must register its domains and subdomains in the **Settings** tab to create organization accounts.

> **Example** — The company Celtix Tech has registered its domain name **celtixtech.com** with Druide. Therefore, all accounts created with email addresses of the type **firstname.lastname@celtixtech.com** will be treated as organizational accounts by default.

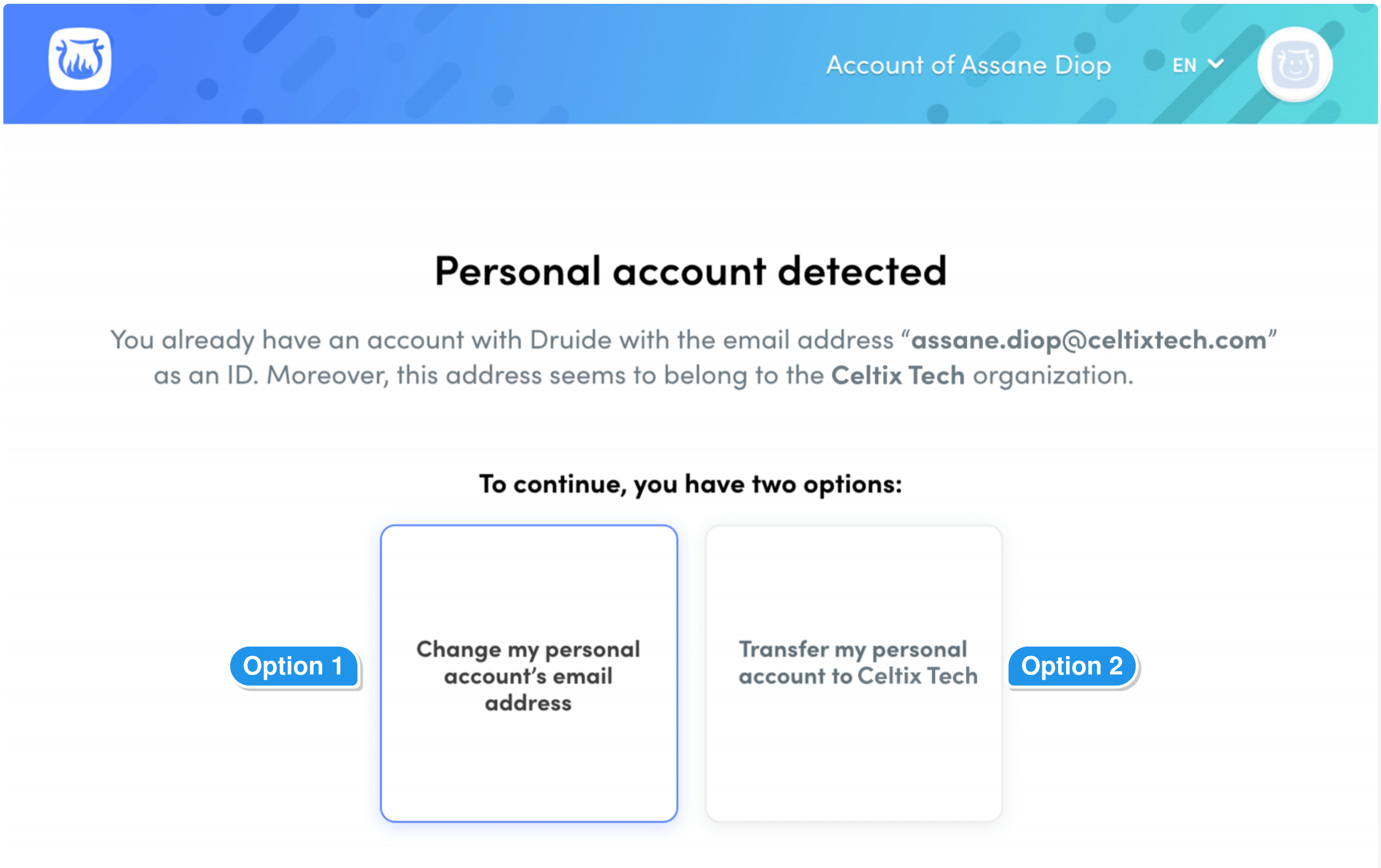
Personal accounts

Personal accounts are Druide accounts that do not belong to an organization but that can still access an organization's subscriptions.

The organization cannot delete personal accounts; it can only remove them from the organization. Removing personal accounts will withdraw their access to the Organization Client Portal and to the subscriptions assigned to them.

SPECIAL CASE: ORGANIZATION EMAIL ADDRESS LINKED TO A PERSONAL ACCOUNT

If an organization invites a user who already has a Druide account and the individual has an email that uses the organization's domain name, they will have to choose between two options.



Option 1 — Change my personal account email address

Change my personal account's email address

By choosing this option, you will have two accounts. Your personal account, which you will now access using a new email address, and the **Celtix Tech** organization account, which you will access using the email address "**assane.diop@celtixtech.com**".

If you have already purchased Antidote Web or Typing Pal subscriptions, they will remain in your personal account.

New email address for your personal account

assaned@myemail.com

Organization account

Email address for your organization account

assane.diop@celtixtech.com

New password for your organization account

•••••••••••••••••

Security level Excellent

New identifiers:

Personal account: assaned@myemail.com
Organization account: assane.diop@celtixtech.com

Save

By choosing this option, the individual can keep their personal account by linking it to a new email address. They then need to choose a new password for their organization account.

This way, they will have a personal account with their private email address and an organization account with their professional email address.

> **Example** — Assane uses the professional email address**assane.diop@celtixtech.com** for his personal Druide account. However, his employer has registered the domain name **celtixtech.com** in order to create organization accounts for an Antidote Web subscription. When Assane accepts the invitation from Celtix Tech, he will need to enter a private email address for his personal account such as **assaned@myemail.com**.

Option 2 — Transfer my personal account to the organization

By giving up their personal account, the individual transfers the property of their account to the organization, including all its products and subscriptions. This means that only the organization will be able to edit or delete the account, and that the user will no longer be able to make purchases with this account.

This option is most likely for someone who wishes to repurpose their professional email address if it was linked to a personal account not containing any Druide products. This person can then take advantage of their organization's subscription.

> **Note** — As a precaution, the option to transfer their account is not made available to individuals who already have Druide products.

Synchronized account

Synchronized accounts are created and managed through Azure Active Directory (Azure AD). If your organization uses this Microsoft service, it is possible to synchronize data with the Organization Client Portal. Synchronizing makes it possible to manage Client Portal accounts from Azure AD. Some functions may be deactivated in the Portal depending on the selected settings.

For more information, see theAzure AD Synchronization section in this guide.

ACCOUNT CREATION

Accounts can be created in many ways:

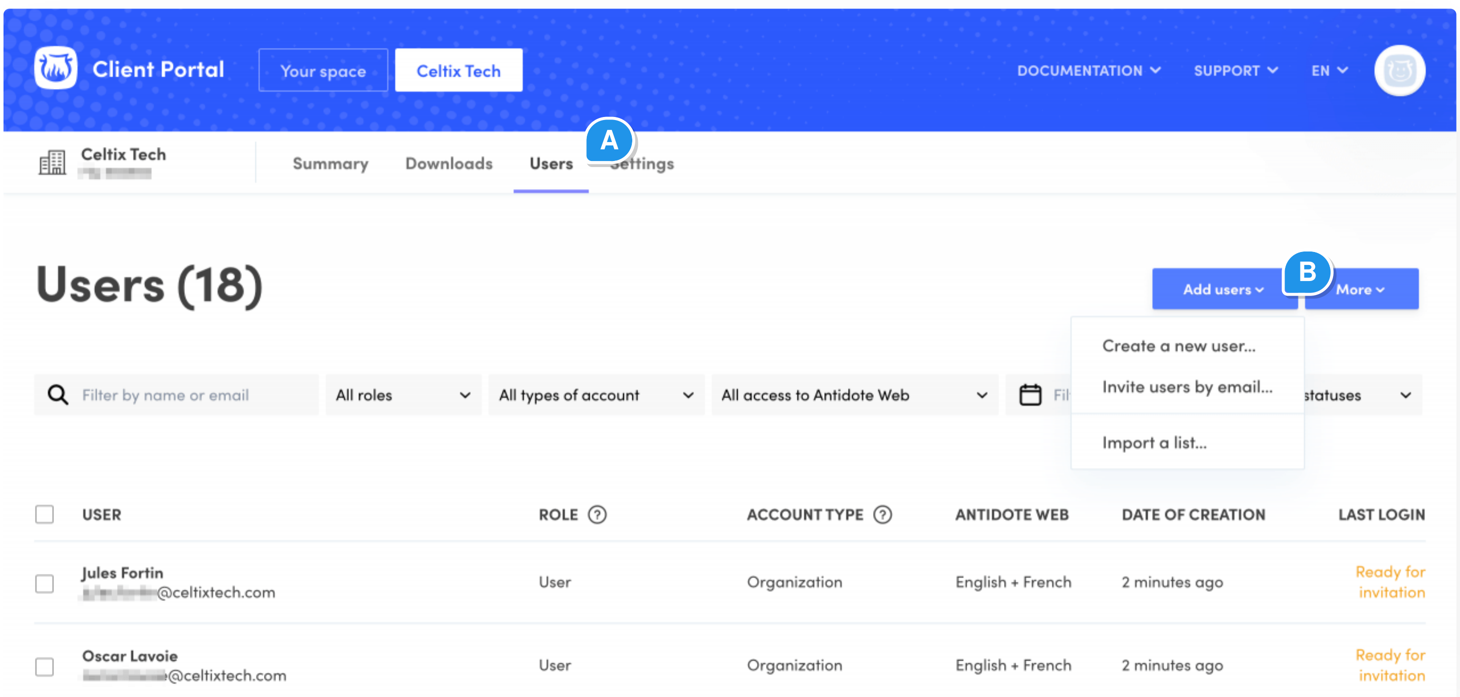
- Manual creation — This option allows you to add accounts on an individual basis. Enter a user's first name, last name and email address.
- Creation by invitation — This option allows you to add multiple accounts using users' email addresses. It's the best way to create a dozen or so accounts in one effort. Invitation messages will be sent immediately.
- Creation by importing a list — This option allows you to add accounts by importing a list. This option is exclusive to Antidote Web, allowing you to easily create a large number of users at once. Sending the invitation email requires an additional step.

Tips
— If your organization has recently acquired Antidote Web and you need to create accounts, read the Organization Deployment Guide for Antidote Web for easy instructions in three simple steps.
— Your organization may create accounts from the Azure Active Directory if it uses this Microsoft service. See the section about synchronization in this guide (beta).

MANUAL CREATION

If you are an administrator or technician for your organization, you can add an account with the following steps:

- Open the **Users** tab (A) in your Organization Client Portal.
- Click **Add users** (B).
- Select **Create a new user** from the drop-down menu.
- Fill out the form.
- Check the box if you wish to send an invitation immediately.
- Click **Add**.



Notes
— The *Role* menu is greyed out for technicians, since they can only create basic user accounts.
— There is no basic user role for a multi-user license, because the license is granted to computer stations and not to people.

Tip — The optional field *Unique Identifier* allows you to link an ID of your choosing to the account, such as a permanent code or an employee number.

CREATION BY INVITATION

If you are an administrator or technician for your organization, you can add one or more accounts in one effort with user emails. Those invited will fill in the missing information themselves. To do this, take the following steps:

- Open the **Users** tab (A) in your Organization Client Portal.
- Click **Add users** (B).
- Select the **Invite users by email** option in the drop-down menu.
- Enter the email addresses of those you wish to invite and separate the emails with commas.
- Select the options to assign users one of thethree roles and link them to a product subscription.
- Click **Invite** and an invitation will be sent automatically.

> **Notes**
> — The *Role* menu is greyed out for technicians, since they can only create basic user accounts.
> — There is no basic user role for a multi-user license, because the license is granted to computer stations and not to people.

> **Tip** — To create a large number of accounts by assigning each one an*Unique Identifier*, we recommend that you use the import function.

CREATION BY IMPORTING A LIST

Importing accounts allows the bulk creation of users from a list. This function is only offered with Antidote Web and can only be used by administrators and technicians. It is particularly useful for educational institutions or large businesses that wish to provide hundreds of people with access to a product.

File templates

Begin by downloading the file templates in Excel or CSV format. These can also be accessed by clicking on**Add users** (B) and selecting **Import a list**. You can change the order of the columns, but the headers must not be modified: the system uses the name of each column to determine the type of content in its cells. The import file must contain the following headers:

	A	B	C	D	E	F	G	H	I
1	Unique Identifier	First Name	Last Name	Email	Antidote Web	Language	Role	Remove?	Delete?
2									
3									
4									

Below follows some information about filling in the file:

- **Unique Identifier** (optional) — A unique identifier can only be assigned to an account for an organization. It must consist of alphanumeric characters. You can use it to link a unique identifier to the account such as a permanent code or employee number.
- **First Name** — This field must consist of alphanumeric characters (50 maximum).
- **Last Name** — This field must consist of alphanumeric characters (50 maximum).
- **Email** — This field must consist of alphanumeric characters (100 maximum) in the format of a valid email

address.

- **Antidote Web** — This field is used to grant access to a subscription using one of the following values:

Subscription	Value to enter
Antidote Web — English	**english**
Antidote Web — French	**french**
Antidote Web — Bilingual	**bilingual**

If the cell is left empty or contains an invalid value, the account will be created without access to Antidote Web.

- **Language** — This field is used to set a user's language of correspondence. To enter a language, use the value "**en**" for English or "**fr**" for French. If the cell is left empty, the language chosen by the person responsible for the organization will be set by default.

- **Role** — This field is used to indicate which of the three roles a user is assigned. It contains one of the following values: "**administrator**", "**technician**" or "**user**". If the cell is left empty, the default value "user" will be assigned.

- **Remove?** and **Delete?** — These fields are used to edit the list of users as part of an update by import. Leave these cells empty or enter "**no**" to create new users.

Importing a list

Once your import file is ready, follow the steps indicated below to upload your data using the **Users** tab (A) in your Organization Client Portal.

- Click **Add users** (B).
- Select **Import a list** from the drop-down menu.
- Click **Choose a file** and select your list.
- Click **Process the data** to begin importing.

You will receive an automatic email informing you of the outcome of the import operation once the data has been processed. If the list is very short, your report may be accessible directly in the interface within a few seconds. Once the import is finished, you can proceed to the next step of sending invitation messages.

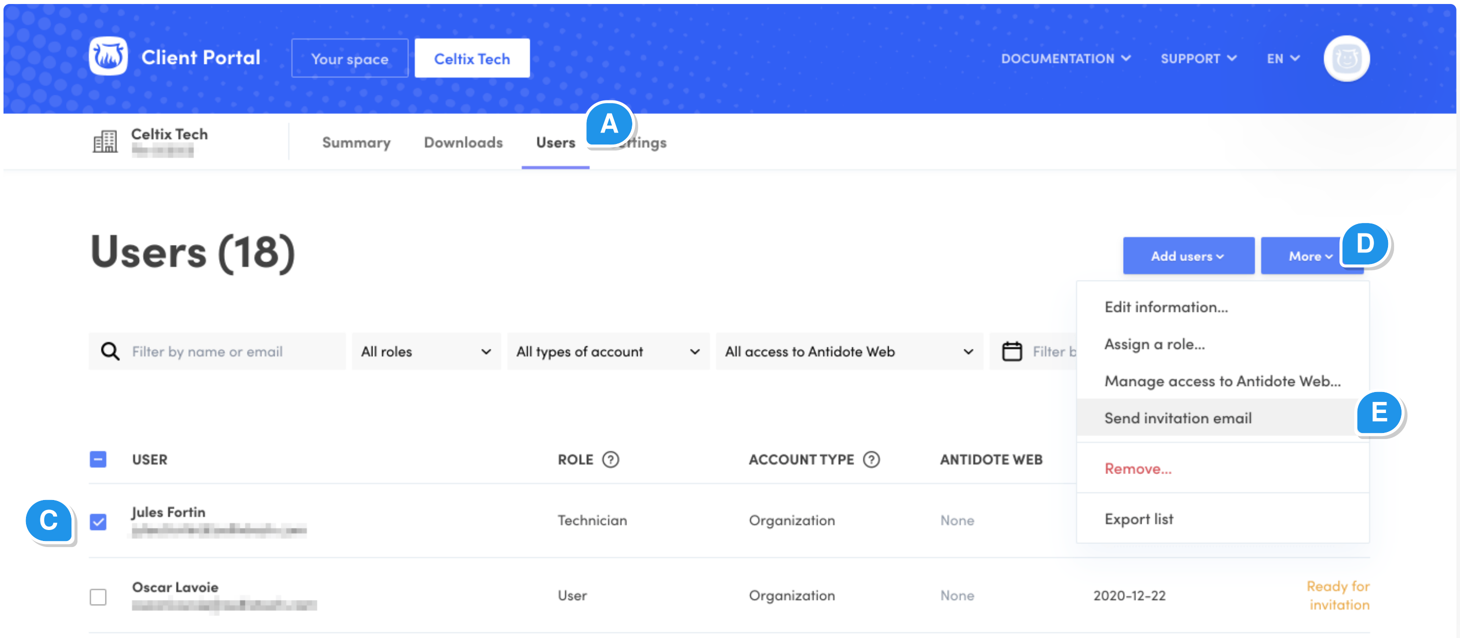
Sending invitations

If you are an administrator or technician for your organization, you can send users an invitation email allowing them to access their Client Portal and its products and subscriptions.

The operation can be completed in a few simple steps:

- Open the **Users** tab (A) in your Organization Client Portal.
- Check the boxes of the users you wish to invite (C). Use the search field or the filters under the title to make it easier to select users.
- Click on the **More** button (D) then select **Send invitation email** (E).

The invitations will be sent immediately.



ACCOUNT MANAGEMENT

Technicians and administrators can manage accounts in the Client Portal's **Users** tab (A). Certain functions are reserved for administrators.

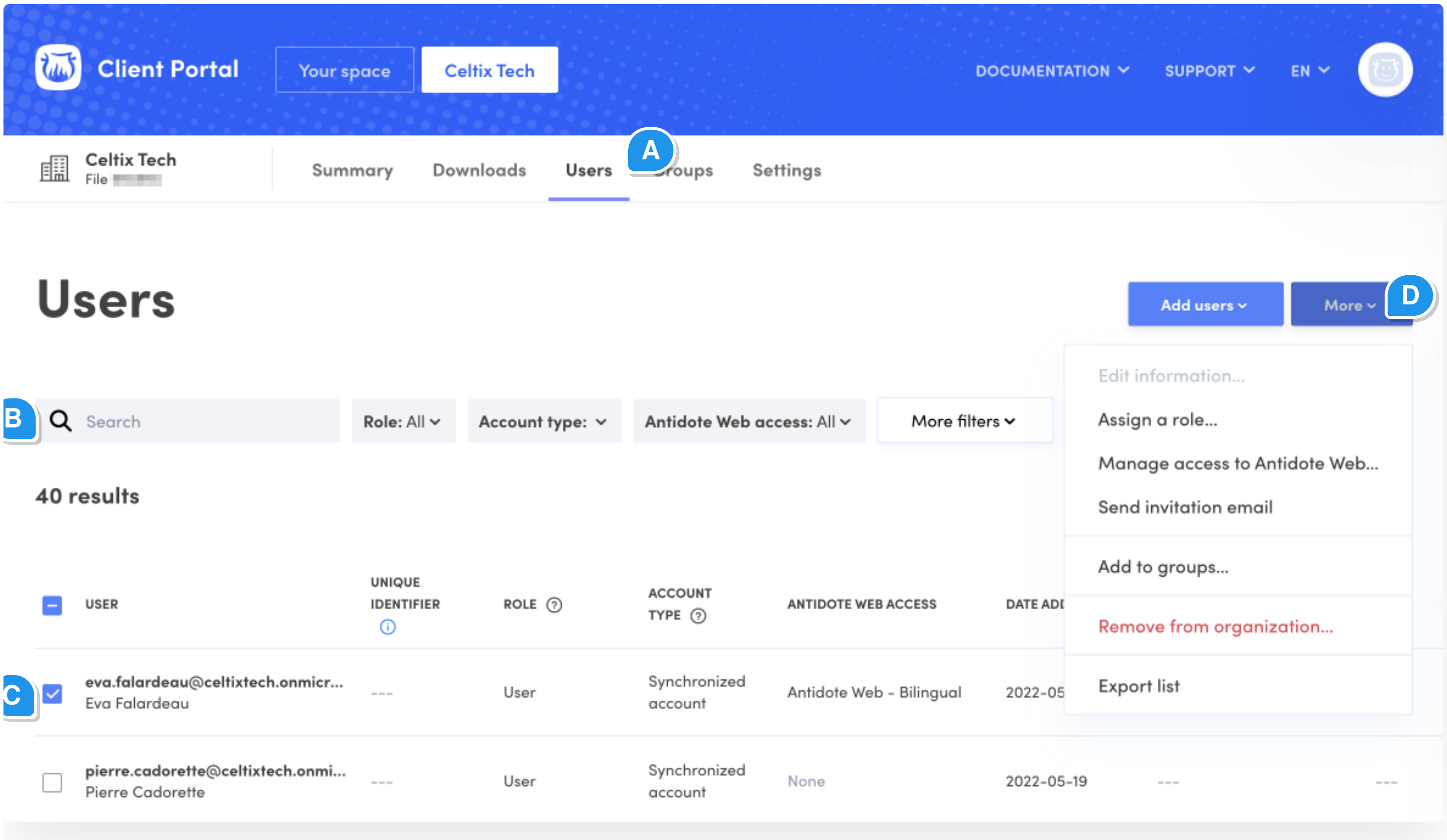
Some functions may be deactivated in the Client Portal if you synchronize with Azure AD (beta).

Search and filters

Search one or more accounts using the search field and the filters at the top of the user list (B).

Click on a filter to show available options and select the ones you need.

There are more filters available than are shown. Click **More filters** to add or remove them. You can also remove a filter by hovering on it with your mouse and clicking the X that appears.



Assigning a role

If you want to change the role that you assigned to the accounts when they were created, check them off (C), then select **Assign a role** from the **More** menu (D). Then, choose the desired role out of the three options and click **Assign**.

Synchronizing with Azure AD (beta): The role of synchronizing accounts may be changed only if manual management has been activated in the synchronization settings.

Managing access to Antidote Web

If you want to edit the subscription that has been attributed to your accounts, check them off (C), then select **Manage access to Antidote Web** from the **More** menu (D). Then, choose the desired subscription and click **Assign**.

Synchronizing with Azure AD (beta): Access to Antidote Web linked to synchronized accounts may be changed only if manual management has been activated in the synchronization settings.

Resending an invitation

You can always resend an invitation if it has not been accepted yet. Check off the accounts concerned (C), then choose **Send invitation email** from the **More** menu (D).

Adding to groups

You may add one or many users to a or many groups in the list. Select the specific group(s) (C) and select **Add to groups** in the **More** menu button (D).

Type a few letters of the group name in the box to include a group or groups. The list of corresponding groups will appear. Make your selection. Click on the X next to the group name to remove a selected group.

Click **Add** to complete the operation.

MANAGING GROUPS FOR A SPECIFIC USER

Managing membership to one or more groups for a specific user is possible from the user's detailed form. Click the corresponding line in the user list and scroll down the form to see the **Associated groups**.

- Click **Add a group** to add this user to a group.
- To remove a user from an existing group, check the group box and select the **Remove the user from the selected groups** option from the **More** menu button.

Removing a user

If you want to remove a user from an organization, check off the account (C), then select **Remove** from the **More** menu (D). Once you have removed a user, they will no longer have access to the Organization Client Portal or to the products or services linked to the subscription assigned to them. Invitations sent to the user will become invalid.

Removing an organization account will delete that account permanently.

To validate the operation, check the box and click **Remove**.

> **Note** — Only organization accounts can be deleted. Users who have a personal account will continue to be able to use it after having been removed from the organization.

Synchronizing with Azure AD (beta): Changes must be made in Azure AD; you cannot remove synchronized accounts from synchronized groups in the Client Portal.

Exporting the list of users

This list of users can be exported to a CSV file. This is particularly useful if you want to access, edit and import the list in order to update accounts. Click on **More** (D) and select **Export list** to download the file.

UPDATE BY IMPORT

Importing allows you to edit your organization's user data using Excel or CSV files. In a single operation, you can add, edit, remove and delete accounts. You can also edit users' roles and their access to Antidote Web.

The update by import is only offered with Antidote Web and is reserved for administrators and technicians.

> **Important** — Accounts synchronized with Azure AD cannot be changed by importing (beta).

GENERAL PROCEDURE

- Export the list of users.
- Edit the information in the exported file.
- Import the updated file.

If an email address or unique identifier is already linked to a user in the organization, the newly imported data will replace the data previously saved in the Organization – Client Portal.

EDITING DATA

When updating the data in the file, take care not to change the headers: the system uses the name of each column to determine the type of content in its cells. You can still change the order of the columns. Below follows some information about modifying each column.

	A	B	C	D	E	F	G	H	I
1	Unique Identifier	First Name	Last Name	Email	Antidote Web	Language	Role	Remove?	Delete?
2									
3									
4									

> **Note** — For any personal accounts included in the list, the only changes applied will be those made to the following columns**Role**, **Antidote Web** and **Remove?**.

- **Unique Identifier** (optional) — This field must consist of alphanumeric characters. To delete a unique identifier, enter "**none**" in the cell.
- **First Name** — This field must consist of alphanumeric characters (50 maximum).
- **Last Name** — This field must consist of alphanumeric characters (50 maximum).
- **Email** — This field must consist of alphanumeric characters (100 maximum) in the format of a valid email address.
- **Antidote Web** — This field uses specific values to modify access to Antidote Web. Only one value per user can be used.

Modification	Value to enter
Grant access to Antidote Web — English	**english**
Grant access to Antidote Web — French	**french**
Grant access to Antidote Web — Bilingual	**bilingual**
Remove current access	**none**

If the cell is left empty or contains an invalid value, no modifications will be made to existing access.

- **Language** — This field is used to set the language of correspondence for new users who haven't created an account yet. To set a language, use the value “**en**” for English or “**fr**” for French. The default language corresponds to the language chosen by the person responsible for the organization.

- **Role** — This field is used to specify or edit which of the three roles a user is assigned. Use one of the following values: “**administrator**”, “**technician**” or “**user**”. If the cell is left empty, the default value “user” will be assigned.
- **Remove?** — Enter “**yes**” to remove the organization’s account. This operation will not delete the account. Leave the cell empty or enter “**no**” to avoid changing anything.
- **Delete?** — Enter “**yes**” to delete the account. Organizational accounts will be completely deleted. This operation is irreversible. Personal accounts will simply be removed from the organization. Leave the cell empty or enter “**no**” to avoid changing anything.

DO YOU NEED TO PERFORM A BULK REASSIGNMENT OR REMOVAL OF ACCESS TO ANTIDOTE WEB?

This might be the case if you wish to reduce the number of users with access when renewing the organization’s subscription. Or, in the case of an educational institution, student access may need to be updated when a new semester gets underway. See this three-step procedure for a simple way of performing this operation.

BULK EDITING ACCESS TO A SUBSCRIPTION

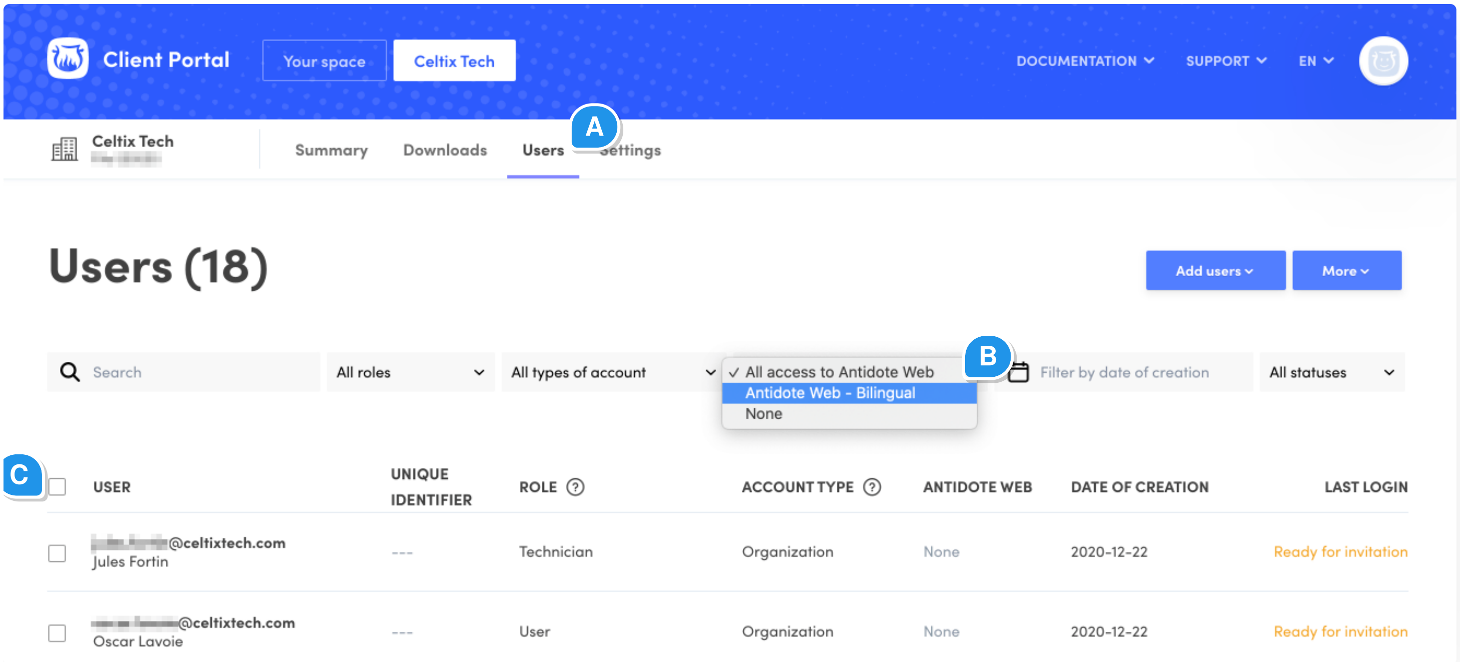
If your organization wishes to bulk edit users’ access to Antidote Web, here is the recommended procedure for performing this operation easily. It involves removing access for the subscription in question, then performing an update by import with the new access values.

> **Important** — This procedure is not applicable if you are synchronizing with Azure AD (beta).

If you are an administrator or a technician, follow these three steps:

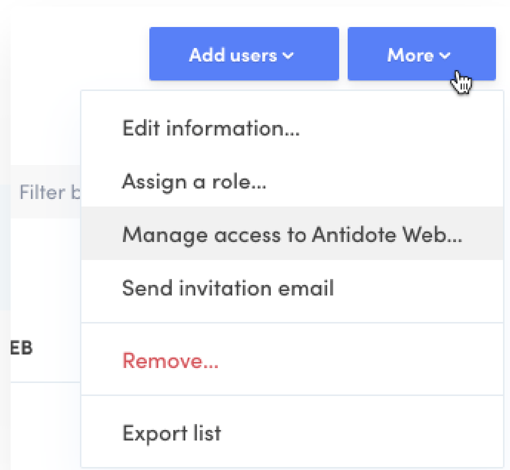
STEP 1 — SELECT ALL THE USERS LINKED TO THE SUBSCRIPTION.

- Go to the **Users** tab (A) in your Organization Client Portal.
- Use the Antidote Web access filter and select the subscription in which you wish to make changes (B).
- Check off the box to select all the displayed users (C).



STEP 2 — REMOVE ACCESS FOR ALL USERS.

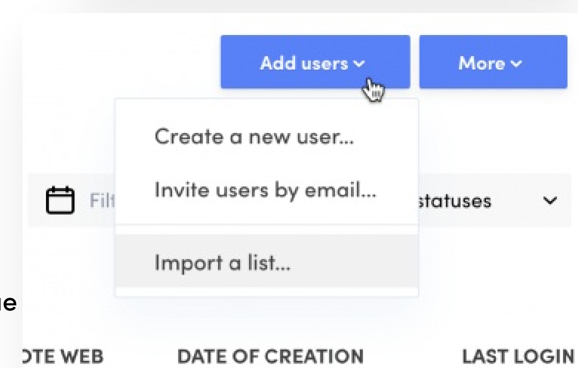
- Click on **More** and select **Manage access to Antidote Web** from the drop-down menu.
- In the window that appears, select **None**, then click on **Assign**.



> **Note** — Don't worry about removing access for all users even if you want certain users to continue to have access. You will restore their access right away in step 3.

STEP 3 — IMPORT THE LIST OF USERS TO BE GRANTED ACCESS

- Click **Add users** and select **Import a list** from the drop-down menu.
- Click on the **Templates** link to download the Excel or CSV file templates.
- Fill in the template file by entering the users to be granted access to Antidote Web.
- Assign users a subscription by entering the corresponding value in the **Antidote Web** column:



Subscription	Value to enter
Antidote Web — English	**en**
Antidote Web — French	**fr**

Antidote Web — Bilingual	**en+fr**

- Click **Choose a file** and select your list.
- Click **Process the data** to launch the import operation.

> **Note** — If the cell is left empty, no subscription will be assigned to the user.

> **Important** — If the number of imported users exceeds the limit for the subscription, any surplus users will be added to the organization but they will not have access to Antidote Web.

If you wish to confirm that the operation has been successfully completed, filter the user accounts by subscription (as in step 1) to display the list of users with access to the selected subscription.

5 GROUPS [BETA]

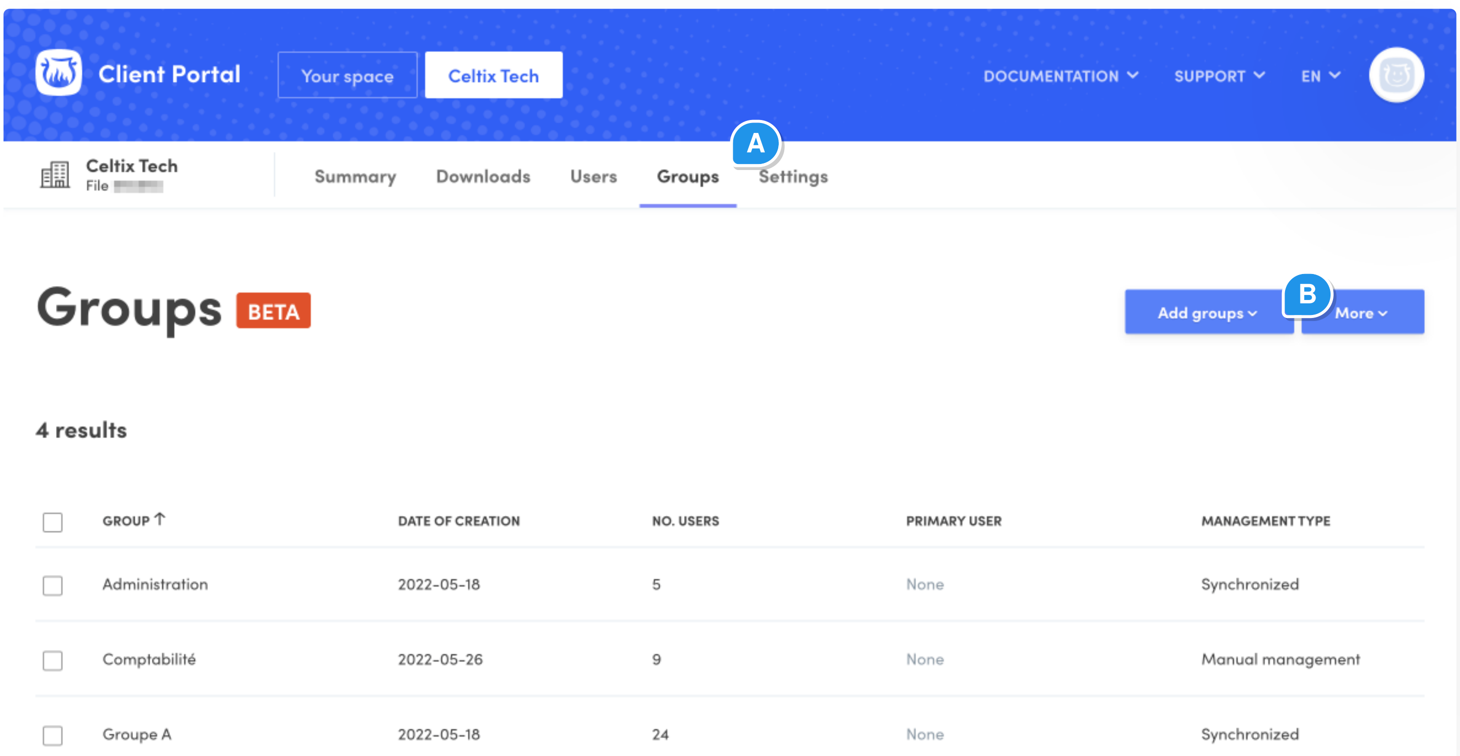
The **Groups** tab makes it easy to create groups and manage members. In addition, the tab shows groups synchronized with Azure AD.

Adding a group

If you are the administrator or technician for your organization, you may add a group with the following procedure.

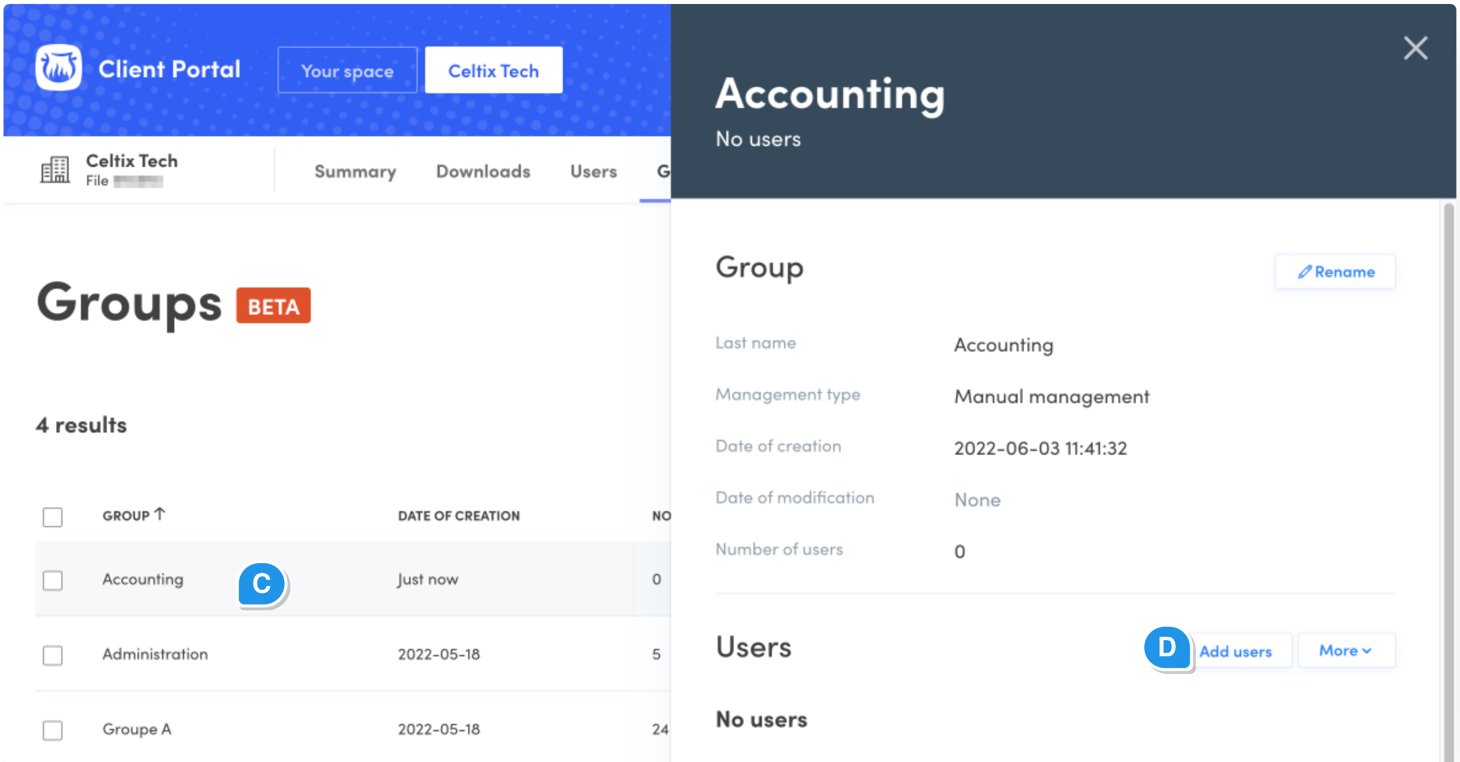
- Open the **Groups** tab in your Organization Client Portal (A)
- Click on the **Add groups** button (B)
- Select the **Create a new group** option in the scroll-down menu
- Type a name for the group in the next window
- Click **Add**

The new group will appear in the group list.

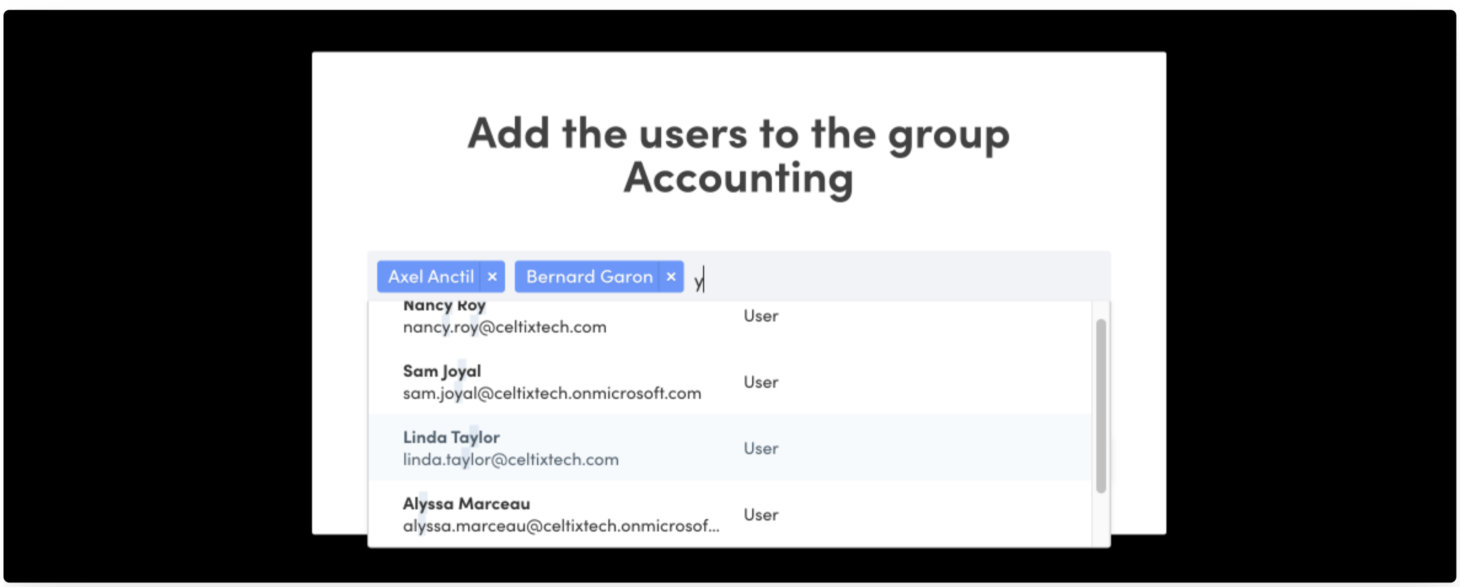


ADDING USERS TO A GROUP

Click the group line to display the detailed form (C) and click the **Add users** button (D). Be sure to have created user accounts before conducting this operation.

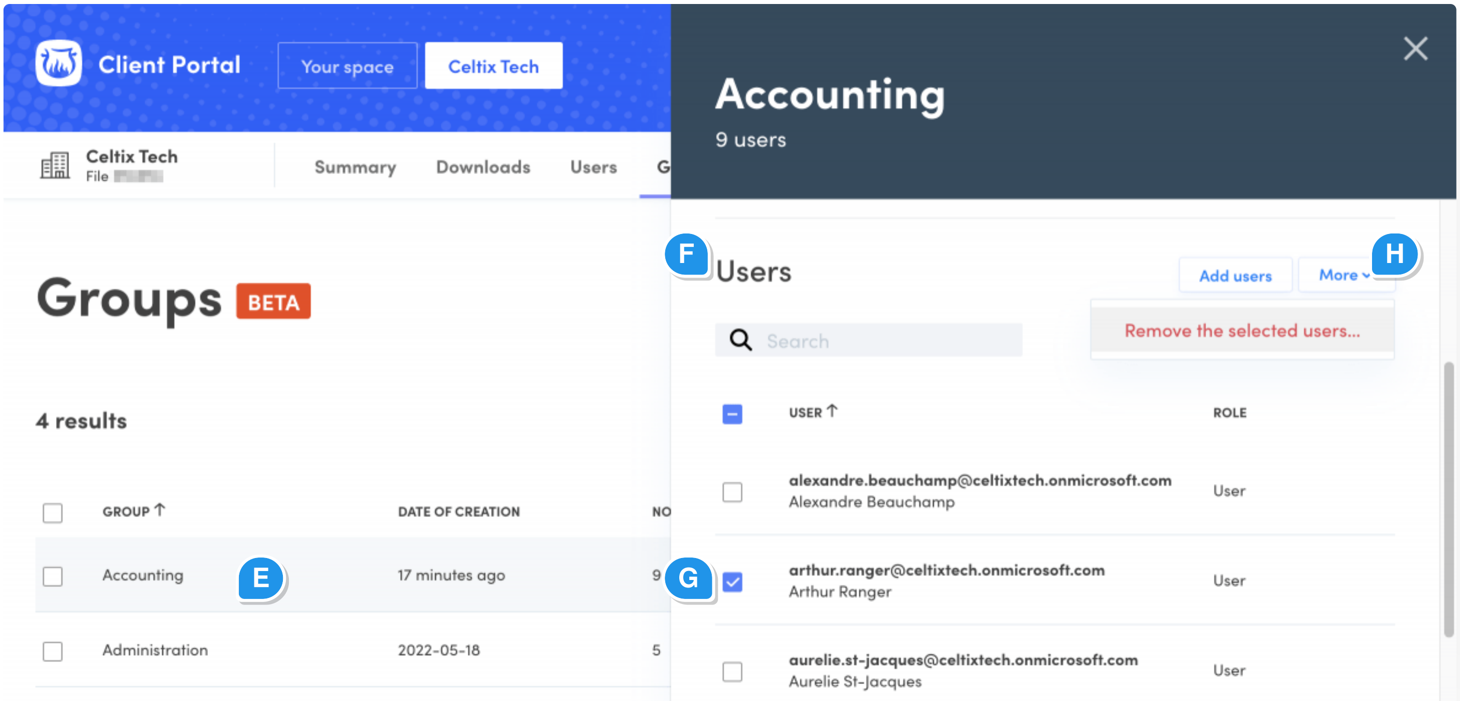


Type a few letters of the user name in the box. The list of corresponding users will appear. Make your selection. Click on the X next to the name to remove a selected user. Click **Add** to complete the operation.



REMOVING USERS FROM A GROUP

Click on the group line (E) to see the complete form and scroll down to see **Users** (F). Check the boxes for the users you want to remove (G) then select the **Remove the selected users** in the **More** button menu (H).

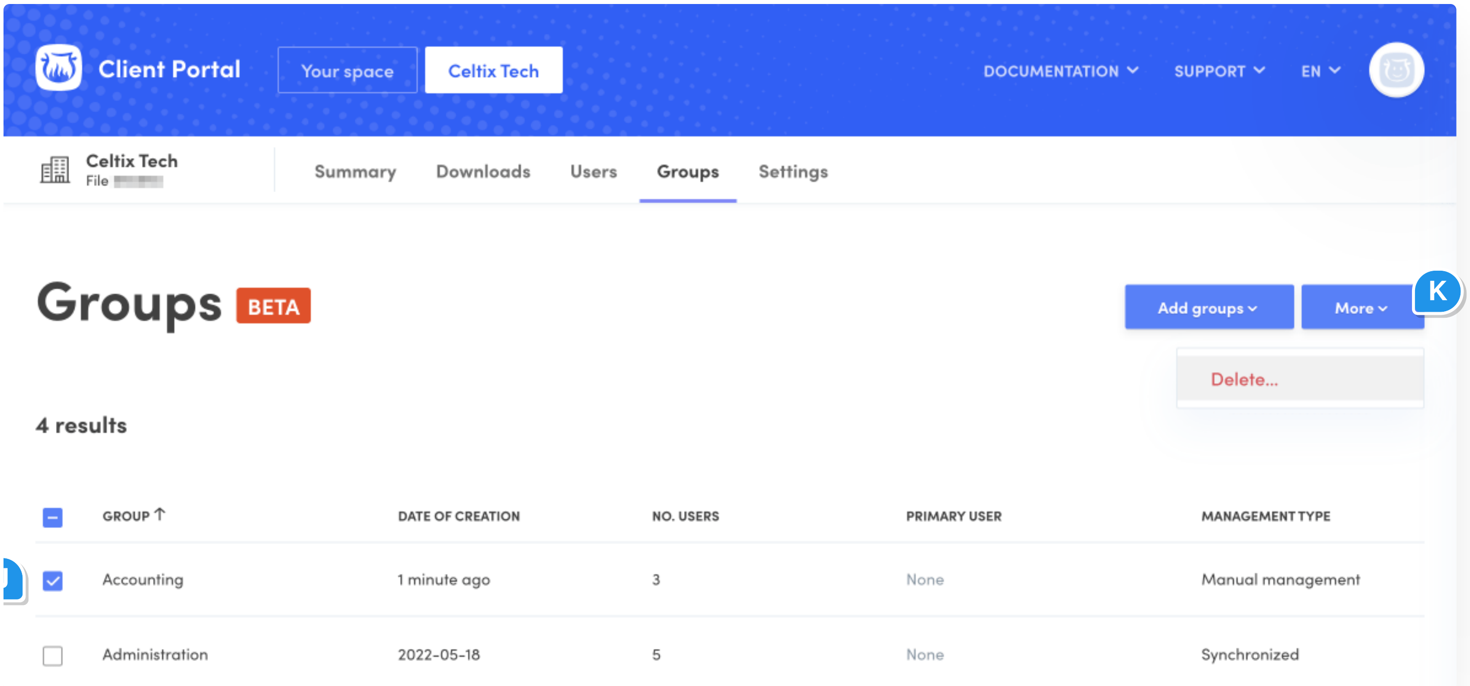


Synchronizing with Azure AD (beta): Changes must be made in Azure AD; you cannot remove synchronized accounts from synchronized groups in the Client Portal.

> **Tip** — You may also add or remove a specific user from one or more groups from the detailed form under the **Users** tab.

Deleting a group

Check the group box (J) then select the **Delete** option from the **More** button (K). This deletes the group but not the users.



Synchronizing with Azure AD (beta): Delete group in Azure AD or remove group in the synchronization settings. You cannot delete a synchronized group from the **Groups** tab.

6 SETTINGS

DOMAIN NAMES

An organization can create organization accounts, which only it controls, by registering all the domain names and subdomains used in its email addresses with Druide.

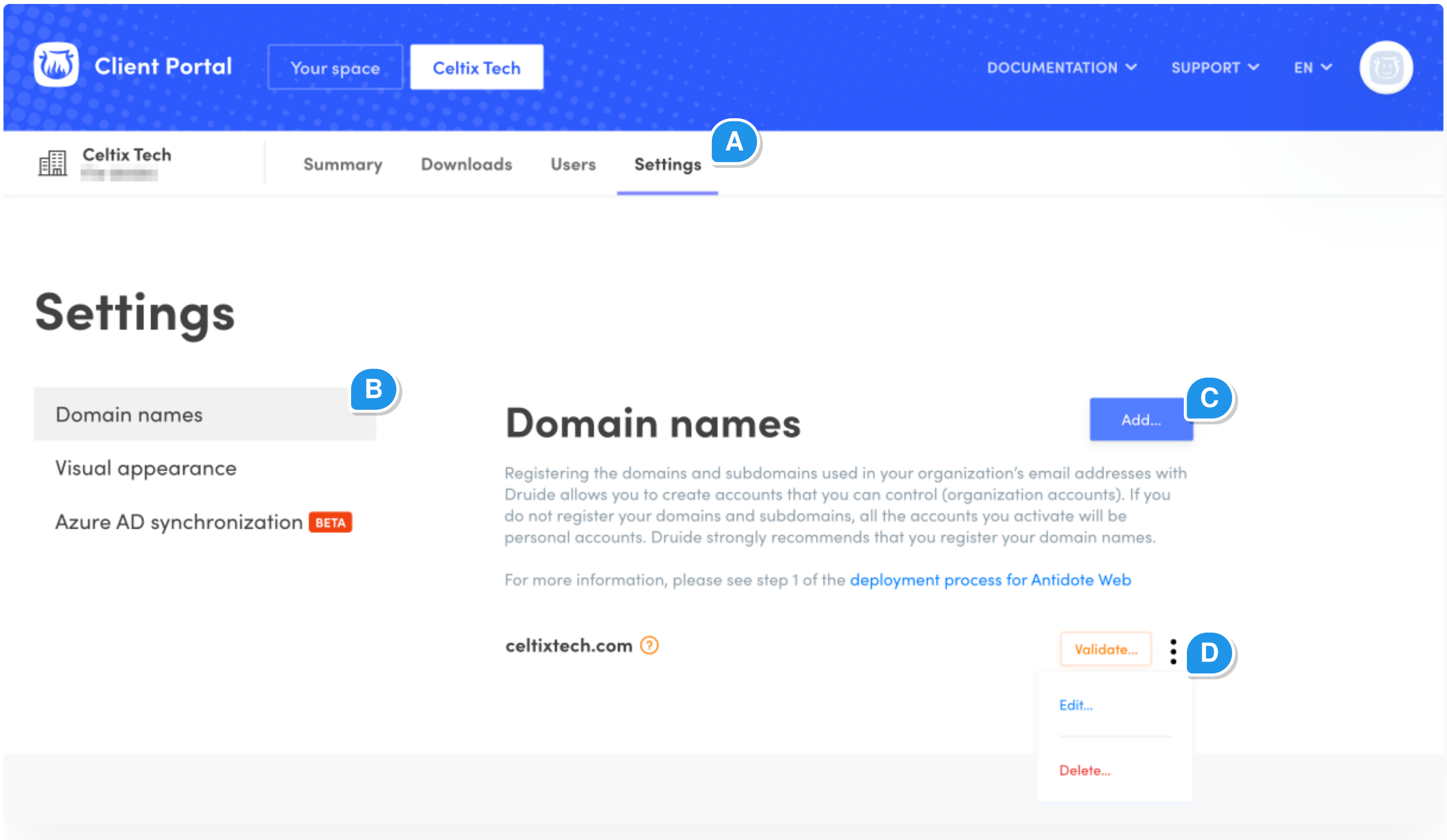
The domain or subdomain in an email address is the part that comes after the “@” symbol.

> **Example** — Employee email addresses at Celtix Tech usually follow the **firstname.lastname@celtixtech.com** format. The domain that needs to be registered with Druide is **celtixtech.com**. The company also uses the subdomains **service.celtixtech.com** and **it.celtixtech.com** in certain email addresses (for example, **administrator@service.celtixtech.com**). These two subdomains also need to be registered with Druide.

Registering a domain name

If you are an organization’s administrator or technician, you can add a domain name by following the steps below:

- Open the **Settings** tab in your Organization Client Portal (A).
- Select **Domain names** from the list of sections (B).
- Click on **Add** (C).
- Enter the domain name, include the subdomain, if necessary, and then click **Save**.



Instructions for verifying the domain name will then appear on the screen.

Step 1 — Access your DNS records

- Log into your domain host account.
- You can access your domain's DNS records on a page that is usually called either DNS Management, Name Server Management, Control Panel or Advanced Settings.
- Select the option to add a record.

Step 2 — Register the verification code

- Choose to add a TXT record.
- In the Name/Host/Alias field, enter @ or leave it empty. Your host may ask you to enter your domain in this field. If need be, consult your other DNS records to see what you need to enter in the field.
- In the TTL (Time-to-Live) value field, enter 86400 or leave the default value.
- In the Value/Answer/Destination field, paste the code that appears in the field.
- Save the record. If you are shown a warning message about changing your DNS settings, you can ignore it. A new TXT record does not affect your website or your DNS settings.

Once you have completed these steps, click **Validate**.

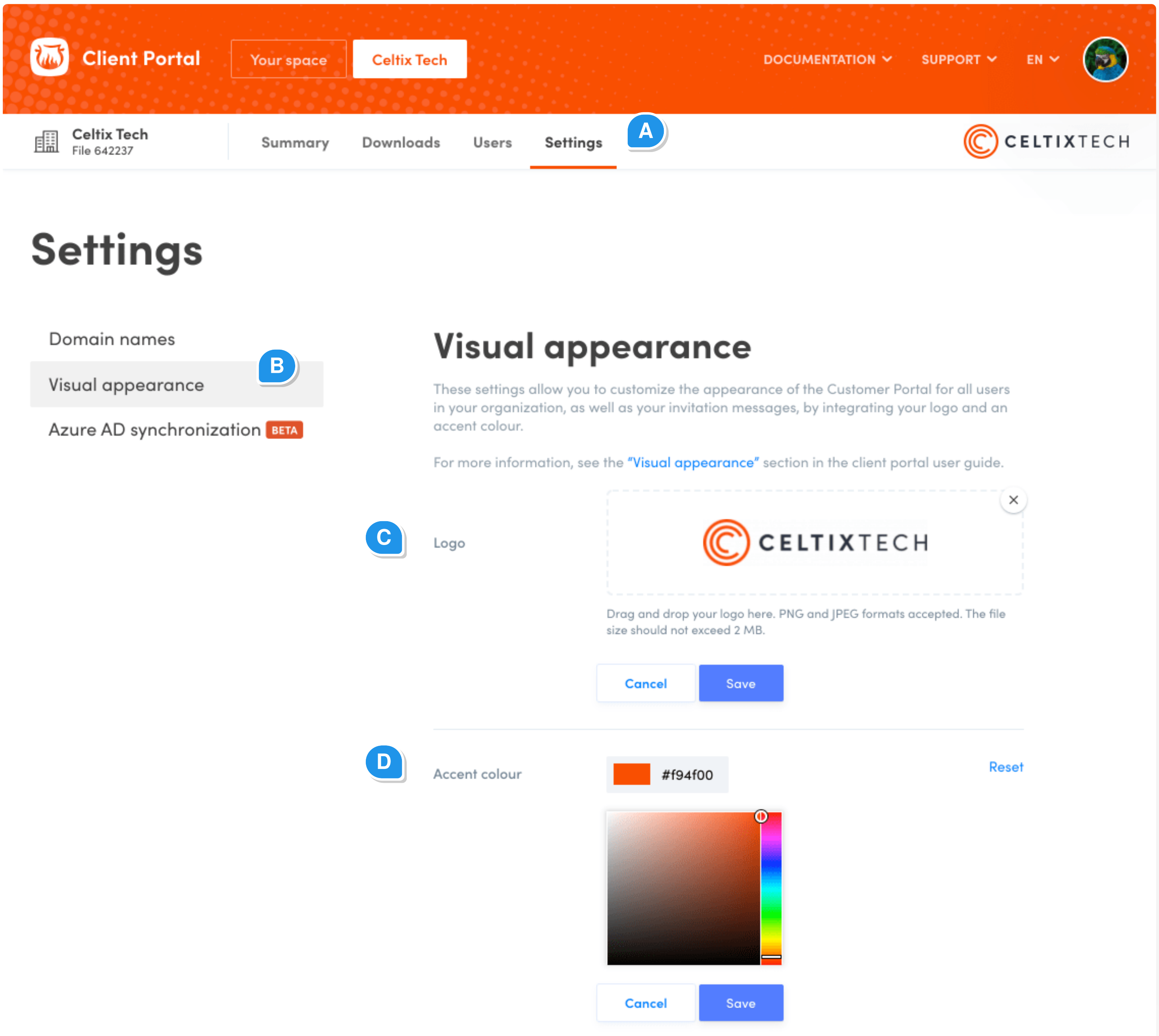
> **Note** — If you can't find the location of your DNS records, contact your website hosting provider.

Actions button

Every domain name has an actions button, consisting of three vertical dots (D), that allows you to **Edit** or **Delete** a domain name. The domain name will need to be verified again after you modify it.

VISUAL APPEARANCE

You can customize your Organization Client Portal with your logo or an accent colour.



Add a Logo

- In the **Settings** tab (A), select **Visual appearance** (B).

- Click the **Edit** button beside **Logo**. (C).
- Drag and drop the logo in the dashed-line box or click on the box to search your files. The file needs to be in JPEG or PNG format and should not exceed 2 MB in size.
- Click **Save**; the logo will then appear in the header.

To remove the logo, click on the X in the corner of the box, then click **Save**.

Change the accent colour

- Click the **Edit** button beside **Accent colour** (D).
- Choose a colour from the colour chart or enter the HEX code in the field with the # symbol.
- Click **Save** to apply the new colour.

To reset the accent colour, click **Reset**, then click **Save**.

AZURE AD SYNCHRONISATION [BETA]

Introduction

If your organization is using Microsoft's Azure Active Directory (Azure AD), Druide has made it possible to synchronize data with your Organization Client Portal. You will not only avoid duplicating data but will also be able to automate some Client Portal functions to make managing user accounts easier.

Once you have configured automatic synchronization data with Azure AD, you can:

- manage your Organization Client Portal user accounts with Azure AD
- grant access to Antidote Web from Azure AD through synchronized groups
- automatically send email invitations to new administrators technicians, and users with Antidote Web access
- enable your users to connect to Antidote Web with their Azure AD account

This user guide chapter has two sections:

- procedure for synchronizing for the first time
- synchronization settings

FIRST SYNCHRONIZATION PROCEDURE [BETA]

Preliminary steps in Azure

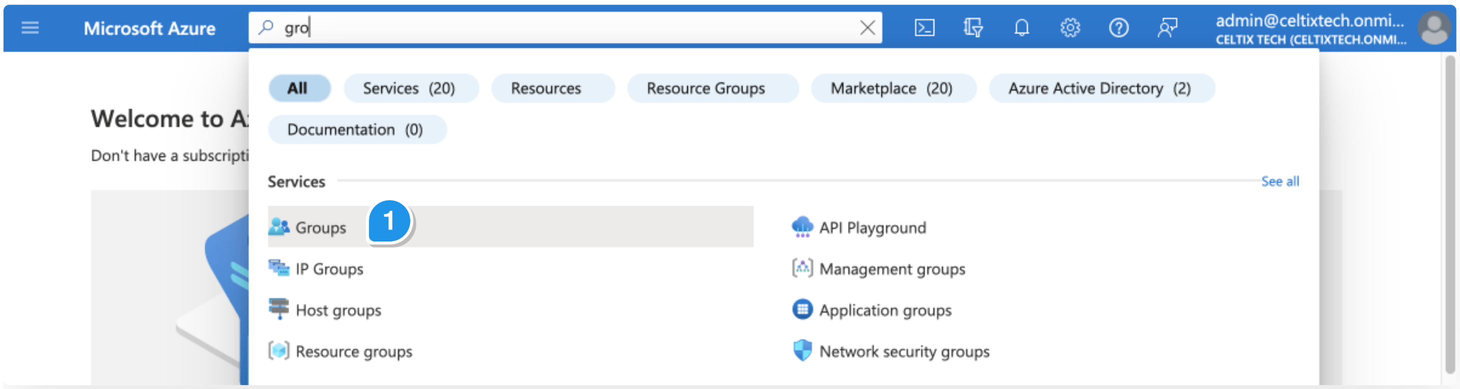
Synchronization with the Client Portal involves two data types in Azure: groups and roles. Preliminary steps are used to prepare the data. Once synchronization has been activated, you can modify synchronized accounts in groups and with roles in Azure.

CREATING A GROUP OR GROUPS WITH USERS WHO YOU WANT TO ACCESS ANTIDOTE WEB

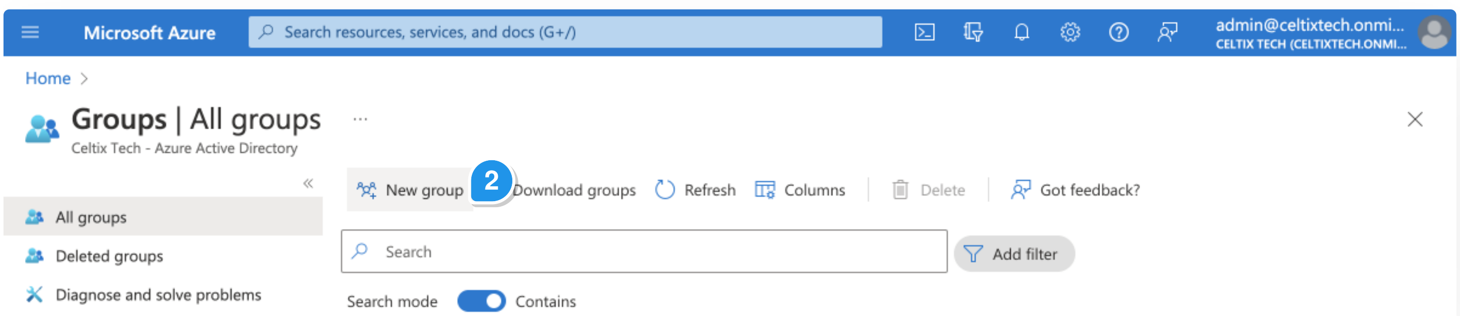
When configuring synchronization, you will grant users access to Antidote Web through groups. You don't need to create new groups if existing groups already contain these users. However, groups within groups (or subgroups) are not covered by synchronization. Ensure that user accounts are at the group's first level.

Here's how to create a group in Azure.

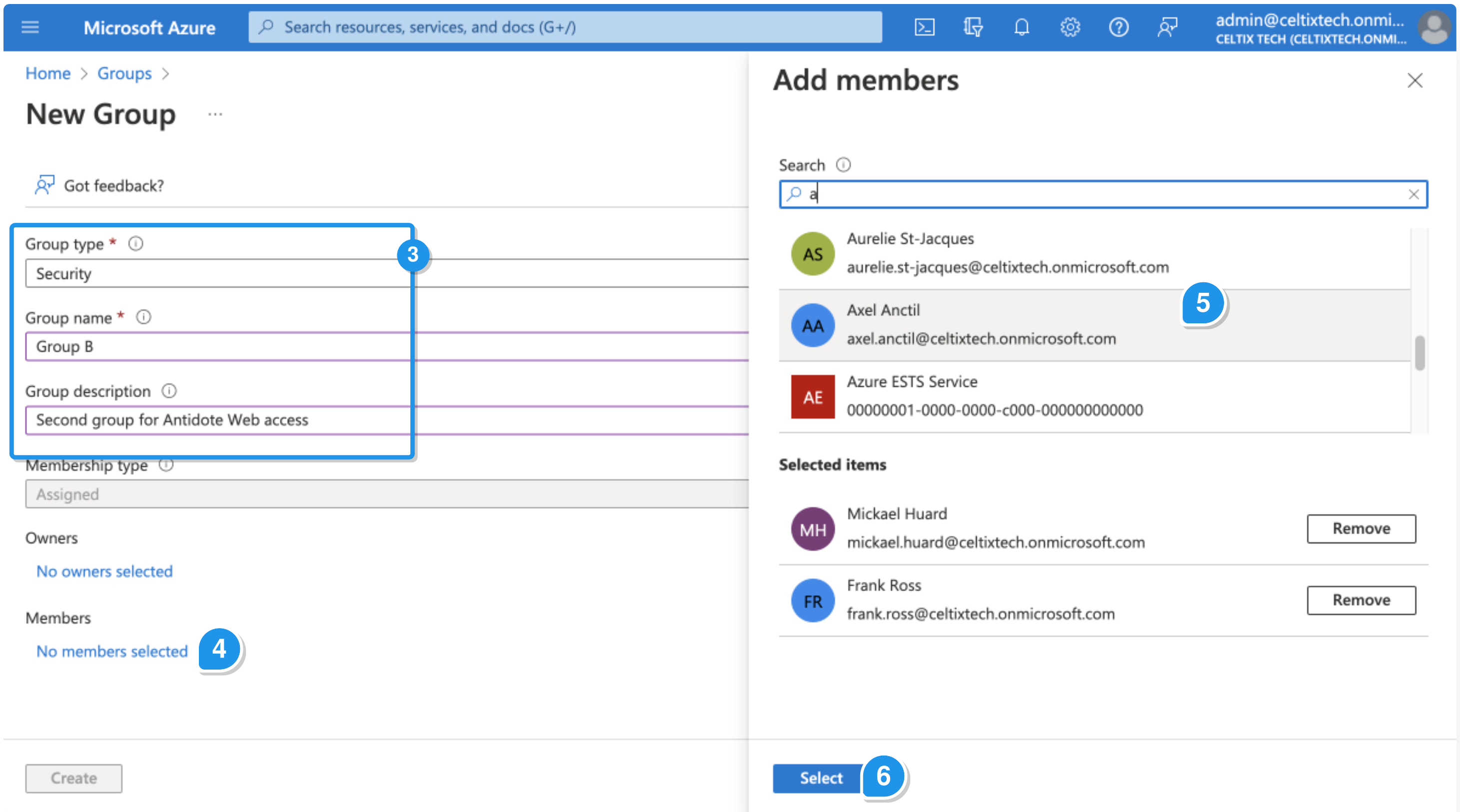
- Go to the **Groups** section. Type this word in the research engine for quicker access.



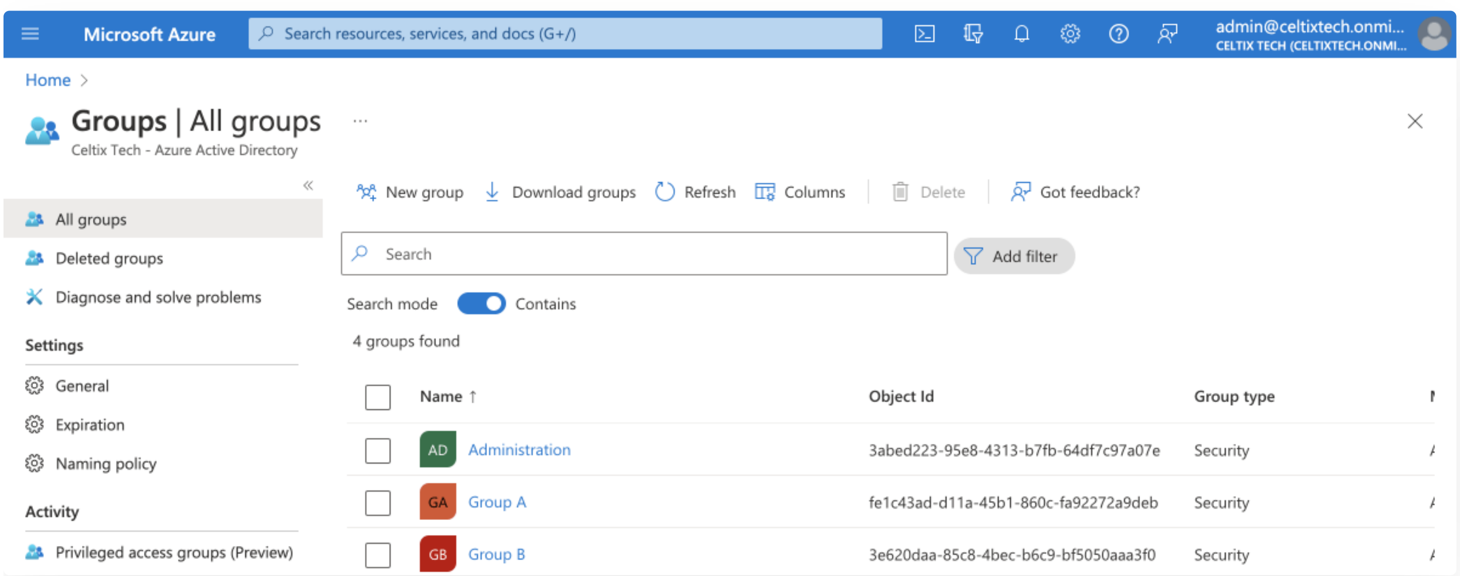
- Click **New group**.



- Fill out the fields:
  - The groupe type does not matter.
  - Enter a name and description for the group.
- Click **No members selected** to add members.
- Choose the users whom you wish to grant access to Antidote Web.
- Click **Select** to add users to the group.



- Return to the group list and refresh the page to display the new group you just created.



ASSIGNING ROLES TO TECHNICIANS AND ADMINISTRATORS

You need to have a general administrator account to authorize synchronization. Ensure the account you are using is assigned this role to carry out the synchronization procedure.

When configuring synchronization, you can create a connection between roles in Azure and administrator and technician roles in the Client Portal. You may, for example, choose these Azure roles:

- The User Administrator can manage all aspects of users and groups, including resetting passwords for limited admins.
- The Groups Administrator can create and manage groups and groups settings like naming and expiration policies.

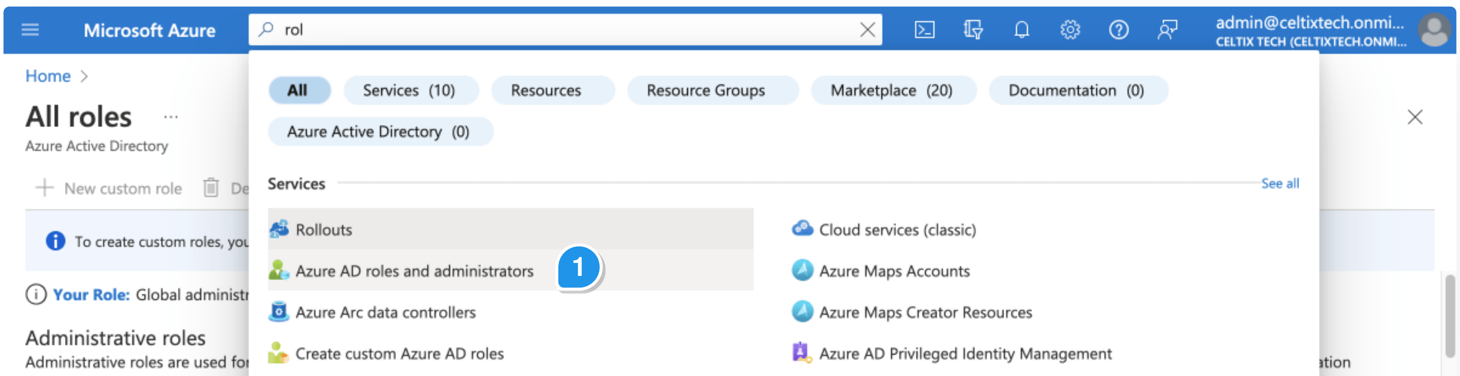
Notes

— Because access is managed within groups, you need not assign specific roles to grant access to Antidote Web.

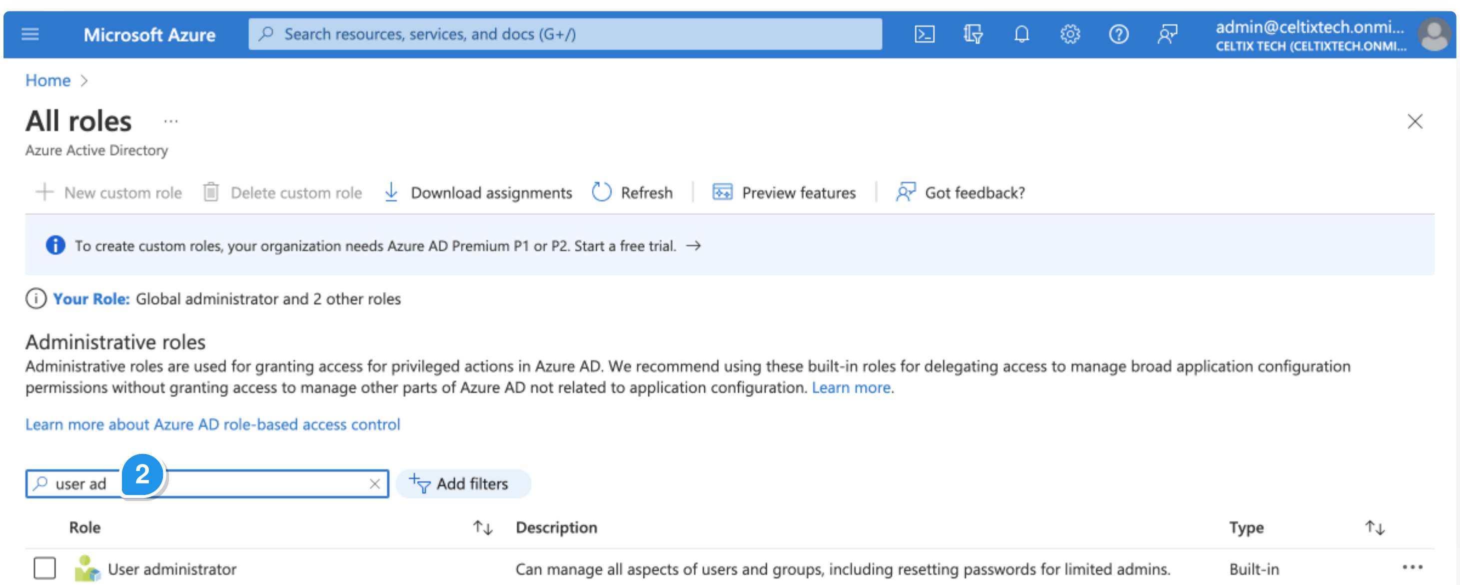
— Synchronizing roles is optional; if you wish, you may use manual role management in the Client Portal.

Here's how to assign roles in Azure.

- Go to **Azure AD roles and administrators**. Type the first letters in the search engine for quicker access.

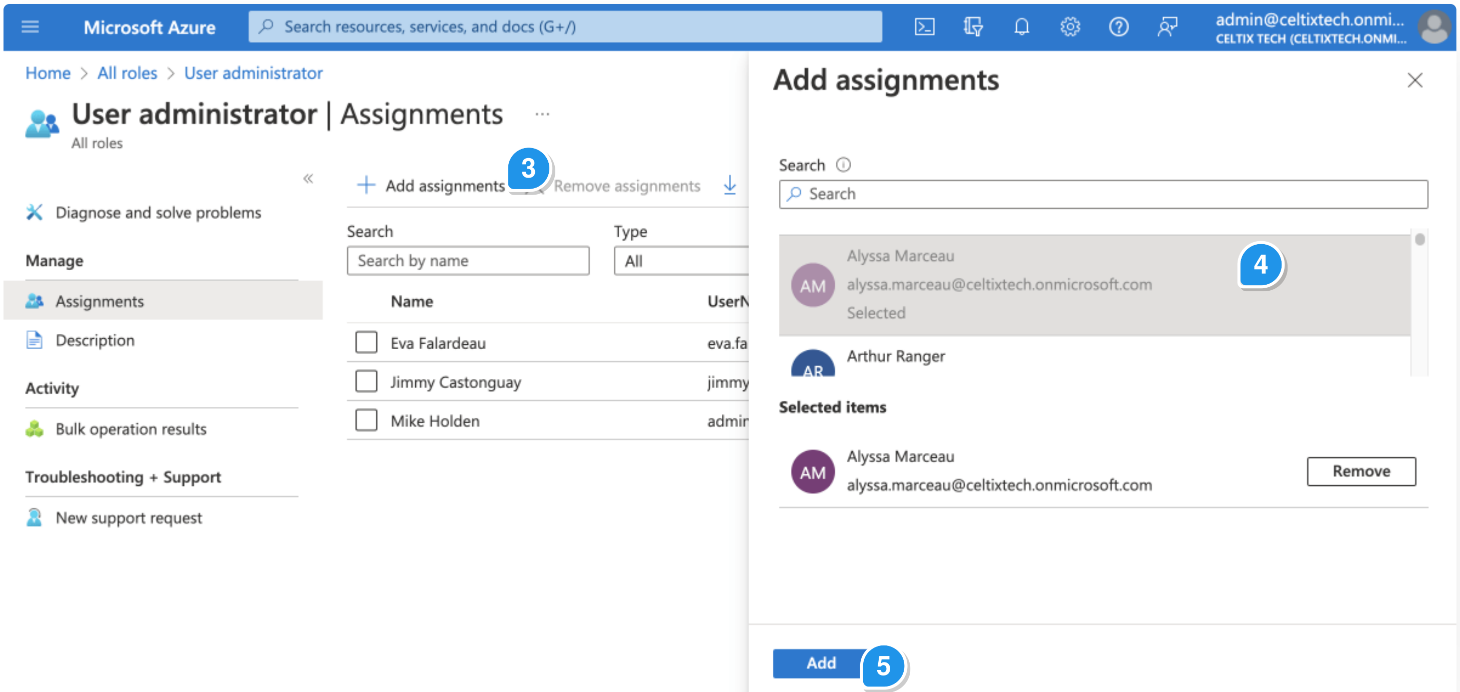


- Use the search engine to select a role (for example,**User administrator**). Click on that role.



- Click **Add assignments**.

- Select the accounts for which you would like to assign this role.
- Click **Add** to assign roles.



Accounts assigned with this role will now be displayed in the role list.

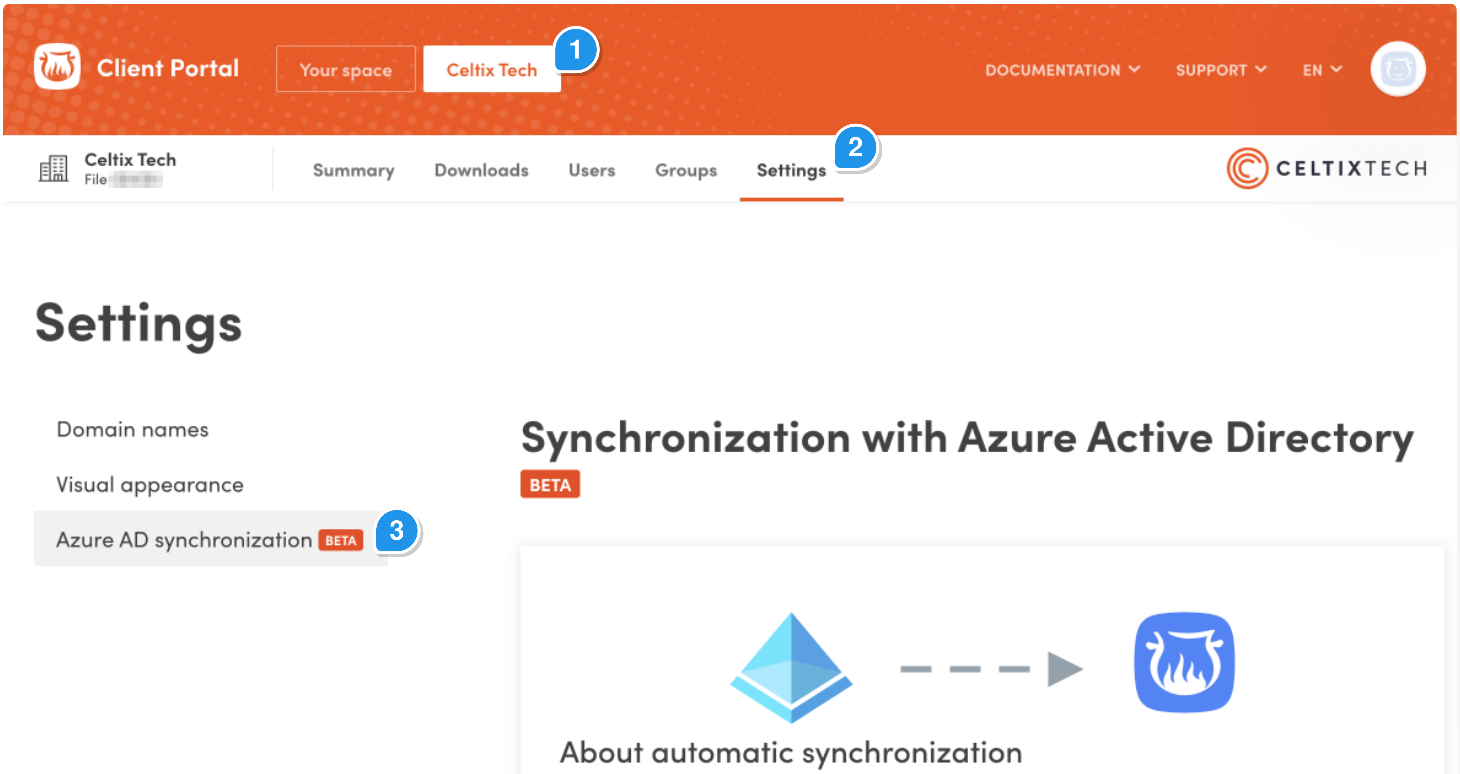
Now that preparation in Azure AD has been completed, you may begin configuring synchronization in the Client Portal.

Configuring synchronization in the Client Portal

Five steps are involved in configuring synchronization. Synchronization begins only at the final step. The only step that cannot be reversed is the first; it must be completed with the help of an Azure AD account that has been assigned the role of general administrator.

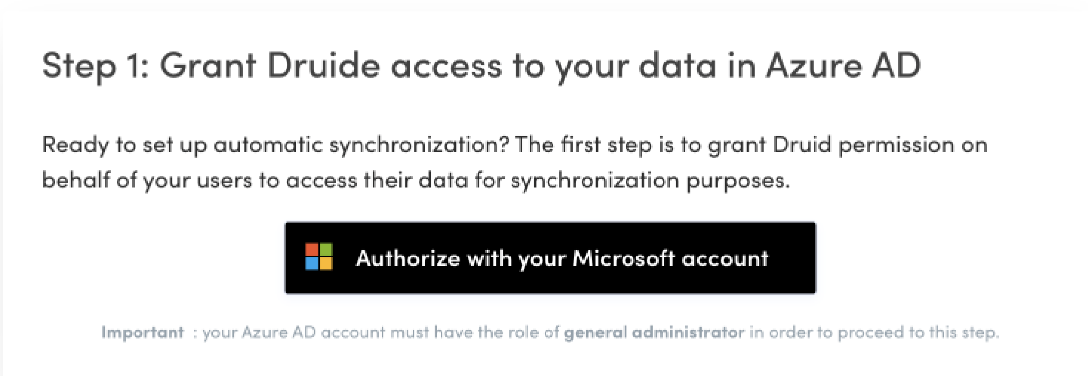
Start by signing in your Client Portal.

Go to your organization's section (1), select the **Settings** tab (2), and select **Azure AD synchronization** (3).

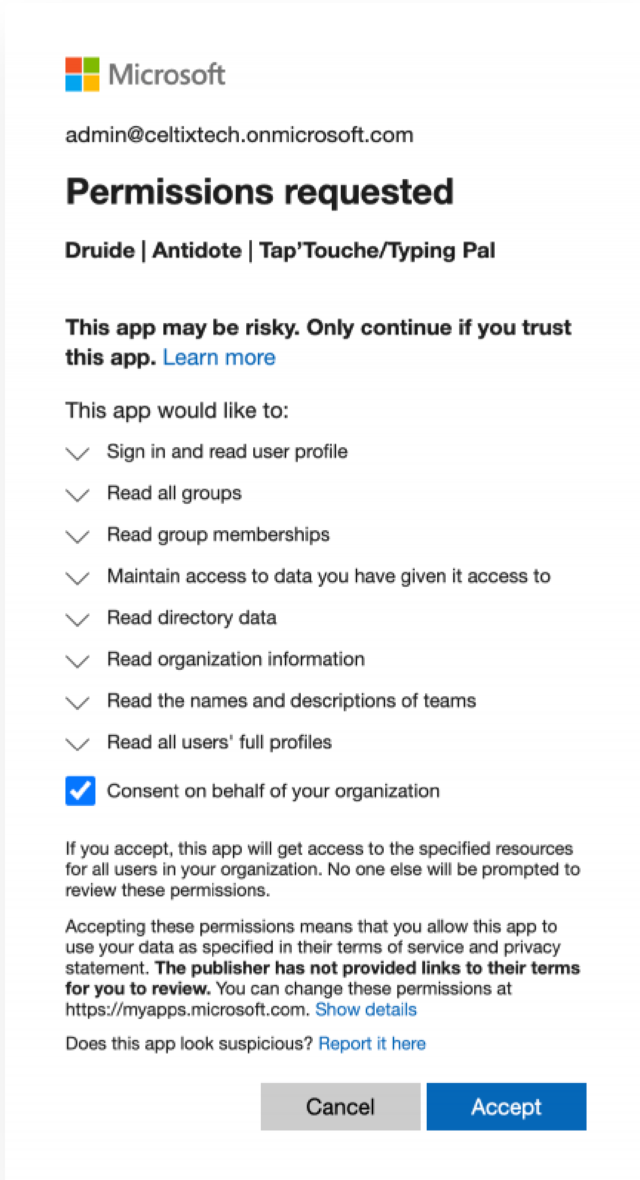


STEP 1: GRANT DRUIDE ACCESS TO YOUR DATA IN AZURE AD

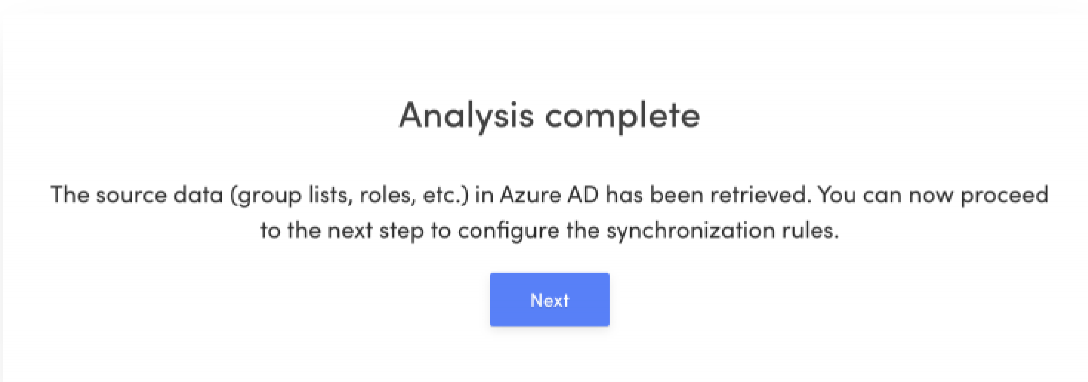
Click the **Authorize with your Microsoft account** button at the bottom of the page.



On the next screen, you are asked to authorize Druide to use Azure AD data for synchronization purposes on behalf of users within your organization. Check the box and click **Accept**.

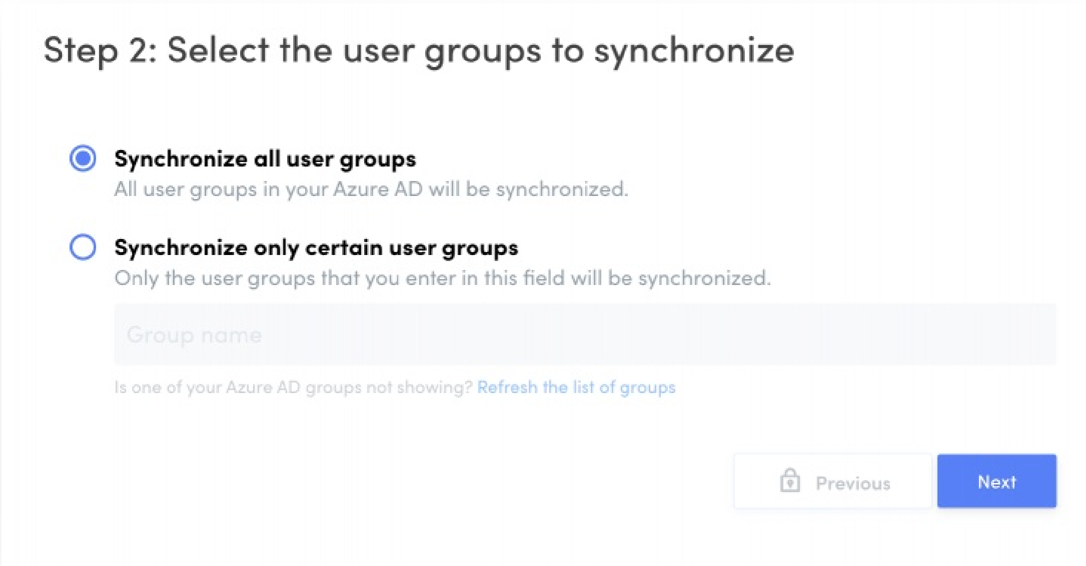


Database recovery in Azure AD, such as group lists and roles, will be automatically launched. When analysis has been completed, click **Next**.

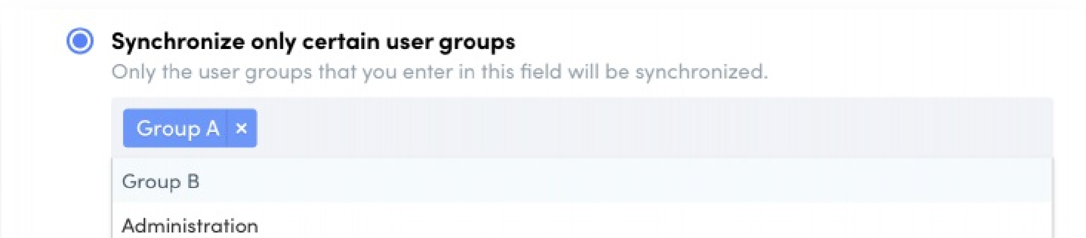


STEP 2: SELECT THE USER GROUPS TO SYNCHRONIZE

You may either synchronize all user groups in Azure AD or synchronize only some groups.



Click the search box or type a few letters of the group name to indicate which groups are to be synchronized. The list of corresponding groups will be displayed. Make your selection.



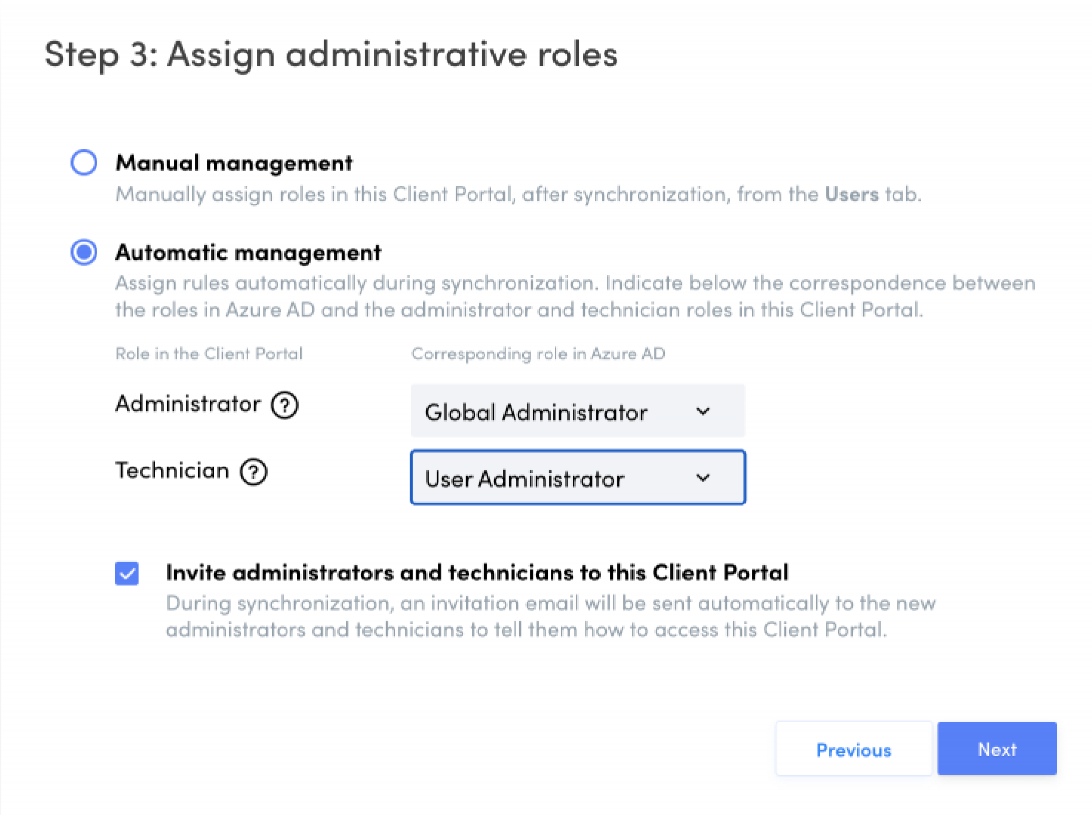
Click the X next to the name of a group to remove a specific group.

Should a recently created group not appear in the Azure list, click **Refresh the list of groups**. Data will be updated.

Once you have completed your selection, click **Next**.

STEP 3: ASSIGN ADMINISTRATIVE ROLES

You can link roles between Azure AD and the Client Portal.



Manual management

Choose manual management if you do not want to synchronize roles. Once initial synchronization has been completed, you may assign roles using the **Users** tab in the Client Portal. See the account management section in this guide for more information.

Automatic management

Client Portal administrator and technician roles are assigned corresponding roles in Azure during synchronization.

Choose both corresponding roles in the drop-down menu. See the user roles section in this guide for more information about privileges granted to both roles.

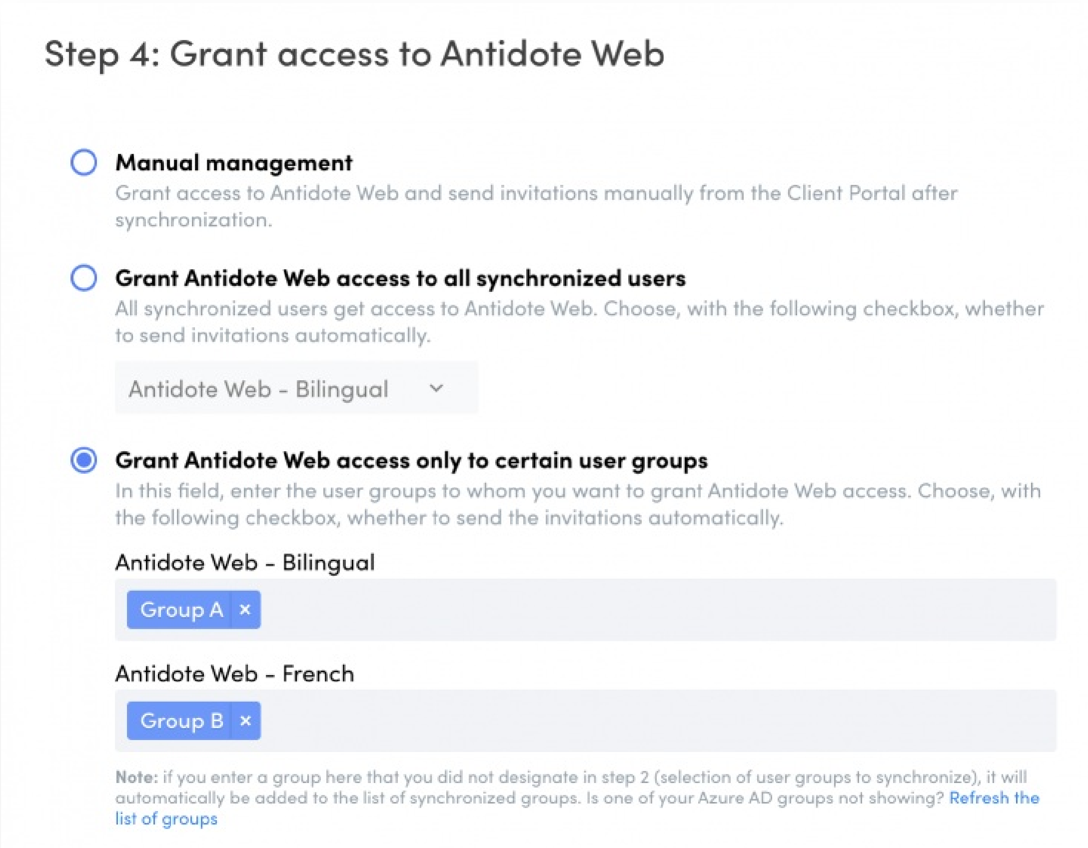
Check the box to automatically email invitations during synchronization. New users with a technician or administrator role will receive instructions for accessing the Client Portal. Synchronization takes place every day, not every minute. There may be a slight delay before invitations are sent.

Leave the box unchecked if you choose to email invitations manually. See the article on sending invitations in this guide for information about how to proceed with this step.

Click **Next** to move to the fourth step.

STEP 4: GRANT ACCESS TO ANTIDOTE WEB

You can grant access to Antidote Web users during synchronization in three ways.



Manual management

Access to Antidote Web is not granted during synchronization. You can achieve this manually at another time by clicking on the **Users** tab in the Client Portal. See theaccount management section for information on how to proceed.

Grant Antidote Web access to all synchronized users

All synchronized users will gain access to Antidote Web during synchronization. If your organization has more than one subscription (for example, Antidote Web — English and Antidote Web — Bilingual), select the subscription you would like to use for granting access in the drop-down menu.

Grant Antidote Web access to only certain user groups

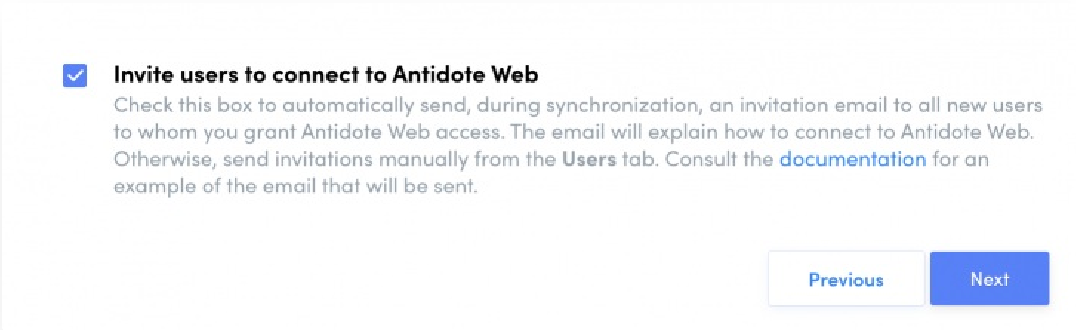
Antidote Web access is assigned in relation to the synchronized groups you have selected. This option is especially useful if you have more than one subscription and would like to grant, for instance, access to Antidote Web — Bilingual to one group and access to Antidote Web — English to another.

Click in the field and type a few letters of the group name to enrol groups. The list of corresponding groups will be displayed. Make your selection. At this stage, you may add a group even if you had not chosen to synchronize it at the second step. The group will automatically be added to the synchronized group list.

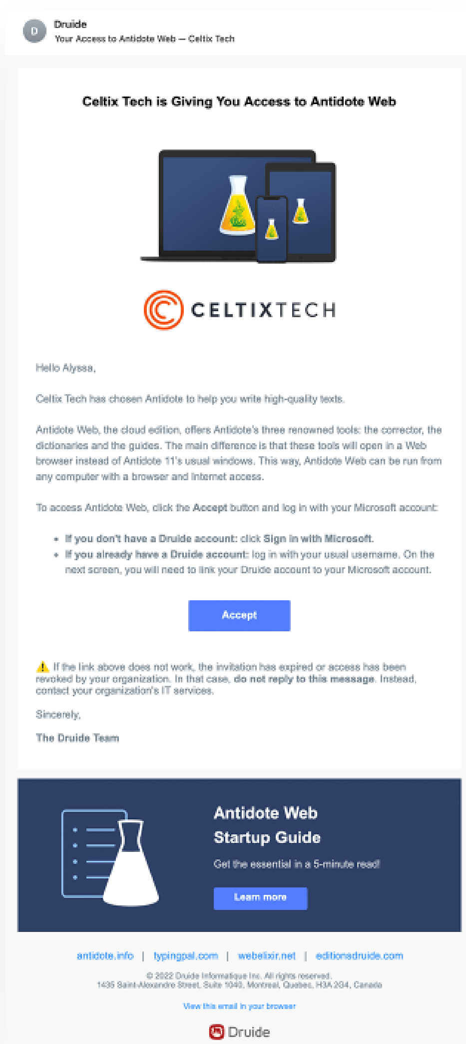
Should a recently created group not appear in the Azure list, click**Refresh the list of groups**. Data will once again be recovered.

Click the X next to the name of a group to remove a specific group.

Invite users to connect to Antidote Web



Check this box to automatically email an invitation to new users who have been granted Antidote Web access during synchronization. The email will explain how to log in; see below for an example.



When you choose this option, a mass number of emails may be sent during the first synchronization if you created a number of new users. Subsequently, only additions in Azure to the synchronized groups with Antidote Web access will trigger invitation emails during synchronization.

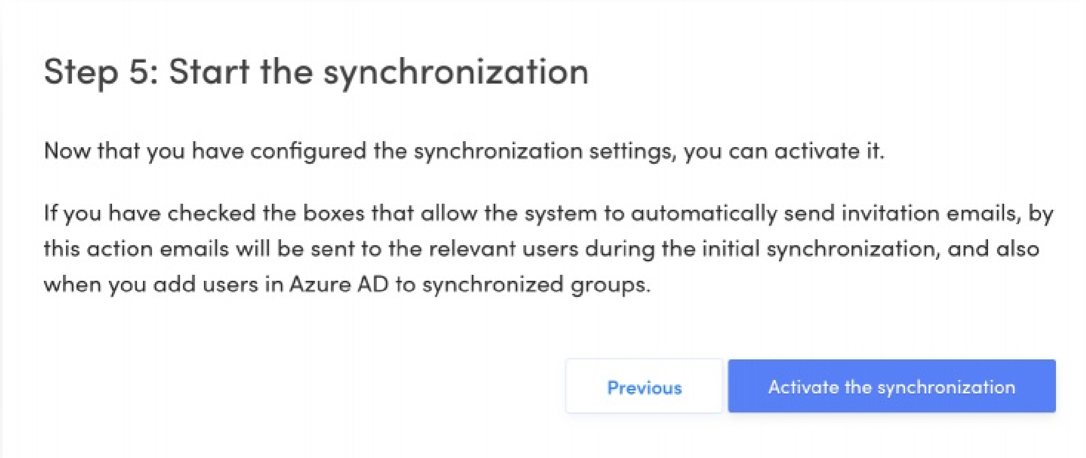
If you chose to manually select users, an email will not be sent during the initial or subsequent synchronizations.

Leave the box unchecked if you choose to send invitations manually. See the article on sending invitations in this guide to find out how to proceed.

STEP 5: START THE SYNCHRONIZATION

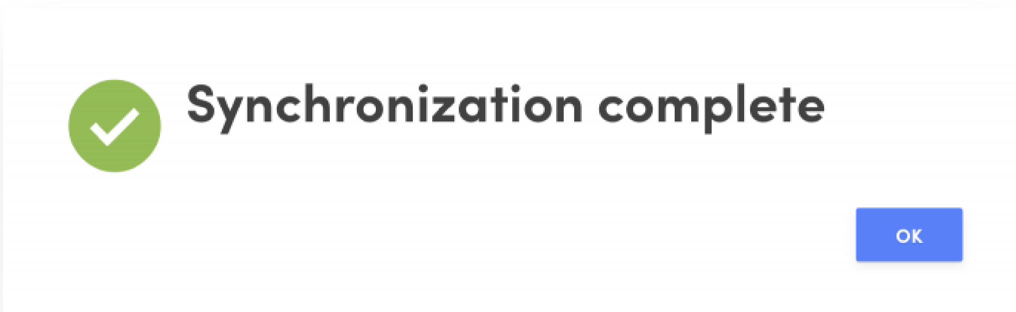
Now that you have configured the synchronization settings, you may now click**Activate the synchronization**.

If you checked boxes to automatically send email invitations during the second step, they will be sent to specific users during the initial synchronization.



The first synchronization may take several minutes depending on data size and our servers load at the time. The synchronization operation will not be affected should you need to leave the page. However, you must return to the page later to verify results.

Once synchronization has been completed, a screen will indicate that the operation was successful or will request that you consult an error report. Click **OK**.



There you have it! Synchronization is now activated and will take place every day.

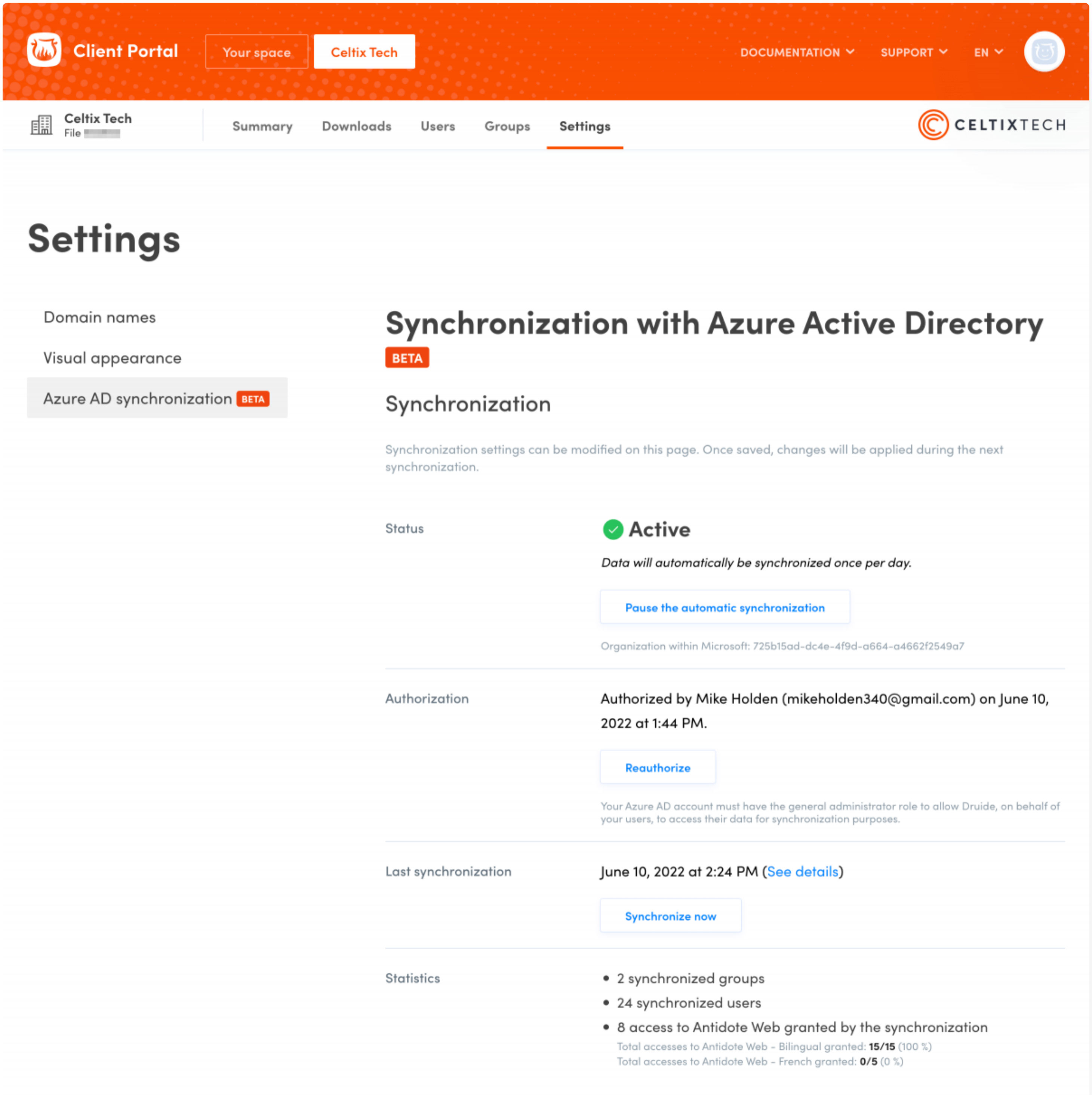
> **Why are some users missing in the Client Portal even though groups have been synchronized?**
> Perhaps these users are in an Azure AD subgroup; groups within groups are not included in the synchronization process. Ensure that no subgroups are in the groups you are synchronizing, and all user accounts are at the first level.

The Synchronization with Azure Active Directory page in the Settings tab of your Organization Client Portal now contains details of the configuration you just completed.

SYNCHRONIZATION SETTINGS [BETA]

This page lays out settings used to synchronize Microsoft Azure Active Directory once the initial synchronization has been completed.

See the procedure section if you have not configured synchronization.



STATUS

Synchronization is either **active** or **paused**.

Pause the automatic synchronization

Click this button to pause synchronization. It may be reactivated anytime by clicking on the button that will read **Launch the automatic synchronization**.

AUTHORIZATION

This informs you which Client Portal user has authorized data synchronization with Azure AD. Click **Reauthorize** as needed. Your Azure AD account must have the role of general administrator to authorize Druide to access data for synchronization purposes on behalf of your users.

LAST SYNCHRONIZATION

This informs you when the last synchronization took place. Click **See details** to find out the latest changes made in Azure AD data that has been recovered.

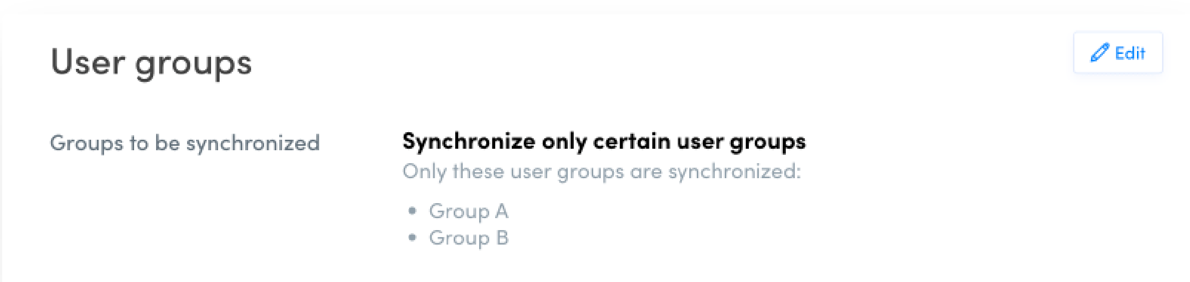
The **Synchronize now** button makes it possible to launch synchronization before the next scheduled daily operation. You cannot relaunch synchronization if it was carried out less than a half hour (30 minutes) ago.

STATISTICS

This page shows data related to synchronized groups and users and granted access through synchronization. The following line(s) show(s) the total number of users with access granted in your subscription(s), including the subscription(s) that was (were) granted outside the synchronization procedure.

User groups

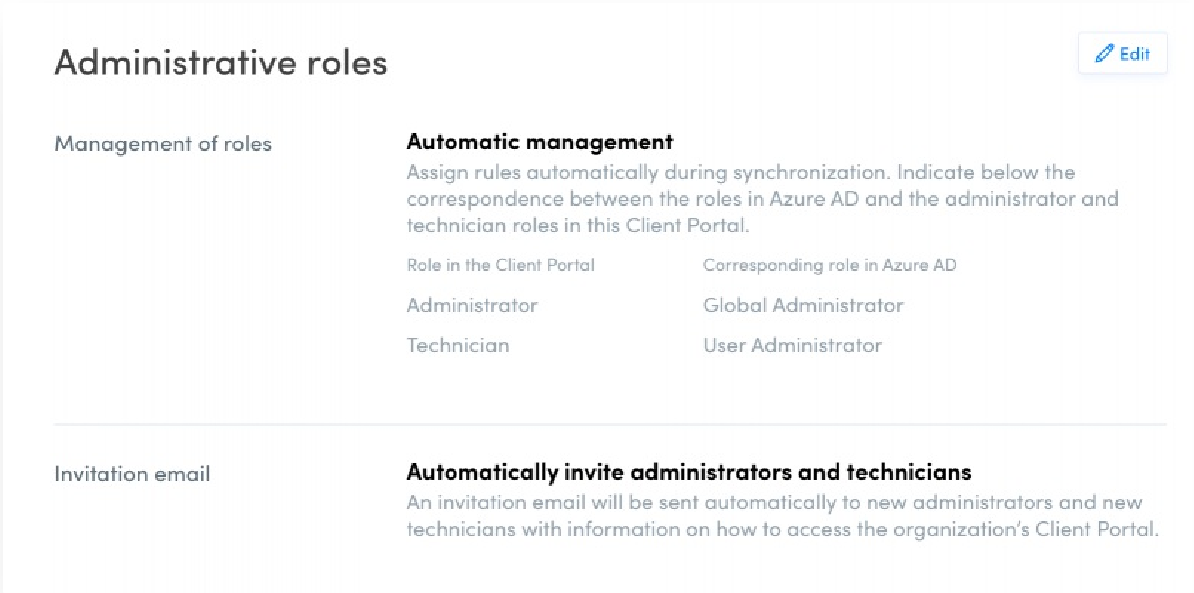
This shows the synchronized user groups.



Click **Edit** to change settings. See the second step of the synchronization procedure (user groups) for more details.

Administrative roles

This shows the current roles management (**manual** or **automatic**) and status of the automatic email invitations (**invite** or **do not invite**).



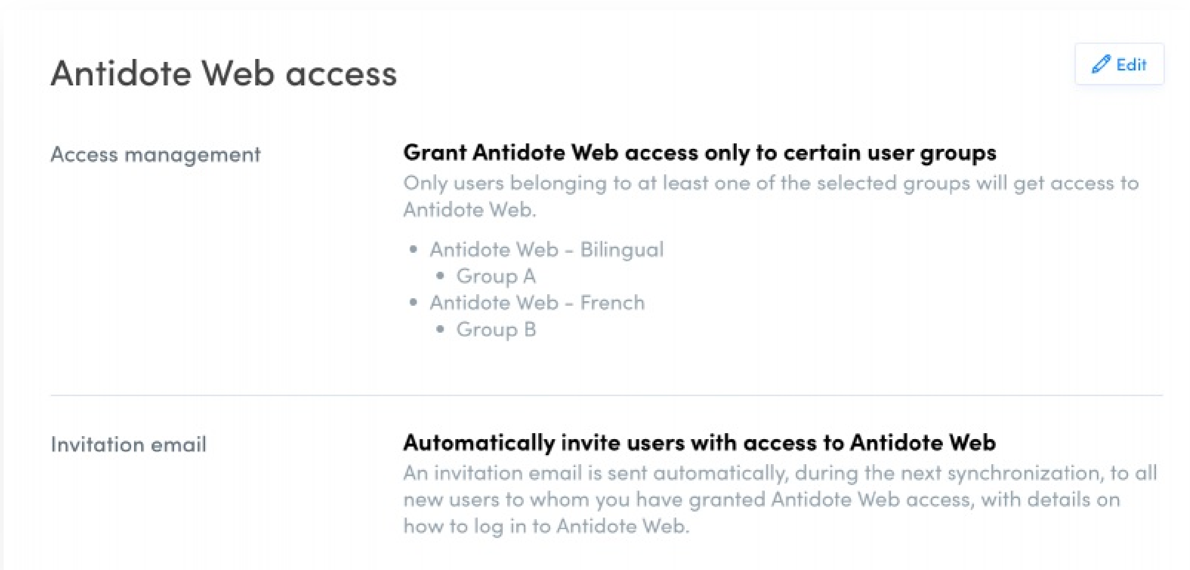
Click **Edit** to change settings. See the third step of the synchronization procedure (administrative roles) for more details.

Special case: From manual to automatic management

If you have used manual management to assign administrator or technical roles without sending invitations then change your settings to automatic invitation, invitations will be sent to these users at the next synchronization.

Access to Antidote Web

This displays the current type of Antidote Web access management (**manual management**, **grant access to all synchronized users**, **grant access only to certain user groups**) and status of automatic email invitations (**invite** or **do not invite**).



Click **Edit** to change settings. See the fourth step of the synchronization procedure (access to Antidote Web) for more details.

Special case: From manual to automatic management

If you have used manual management to assign administrator or technical roles without sending invitations then change your settings to automatic invitation, invitations will be sent to these users at the next synchronization.