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Managing Users and Groups

Terms you'll need to understand:

- ✓ Group management
- ✓ User management
- ✓ Administrative process
- ✓ Notes ID expiration
- ✓ Roaming users

Techniques you'll need to master:

- ✓ Changing a user's group membership
- ✓ Changing a user's location in the hierarchy
- ✓ Changing a user's name
- ✓ Deleting groups
- ✓ Deleting users
- ✓ Extending a Notes ID's expiration date
- ✓ Managing groups
- ✓ Modifying Person documents
- ✓ Moving a user's mail file
- ✓ Renaming groups
- ✓ Setting up roaming users

This chapter covers the tasks required to manage users and groups in the Domino domain. Creating new users and setting up roaming users are key topics that are covered here and that should be studied for the exam.

Changing a User's Group Membership

When users change departments or leave the company, administrators are required to perform maintenance on the user profile to change how the user is defined in a group. Editing a group requires ACL access to the Domino Directory with one of the following defined security assignments:

At least Editor with Create Documents privilege

Or

The UserModifier role

Follow these steps to change group membership assignments:

1. Using the Domino Administrator client, navigate to the People & Groups tab.
2. Expand the Domino Directories item and select Groups. A list of the valid groups on the server displays in the main navigation window. Select the group that needs to be edited and then click Edit Group and open the Basics tab.
3. Do not edit the group name (the assigned name of the group) unless absolutely necessary; changing the group name also requires changing the ACLs in databases associated with this name. The maximum length for group names is 62 characters.
4. Edit the group type by selecting from the available types, described as follows:
 - ▶ *Multipurpose*—Used for multiple types of users. Multipurpose is the default selection.
 - ▶ *Access Control List Only*—Exclusively used to maintain database and server authentication.
 - ▶ *Mail Only*—Exclusively used for mail users.
 - ▶ *Server Only*—Exclusively used for Connection documents and Administrator clients to group domain bookmarks.
 - ▶ *Deny List Only*—Exclusively used for denying access to the server.

NOTE

You cannot change the group's Category setting; Administration is the only selection.

5. If you choose to do so, you can add a description of the group to the Description free form field.
6. In the Mail Domain field, enter the name of the mail domain used by this group.
7. Identify the group with an Internet address by adding the address to the Internet address field; after you have done so, the group can receive Internet mail.
8. In the Members field, add, delete, or change the names in the list of users to define the members of the group.
9. Click Save & Close to save the group changes.

Changing a User's Location in the Hierarchy

Users may change departments or move to other company subsidiaries, requiring an administrator to change their location in the hierarchy. Moving a user changes the Organizational Unit (OU) assigned to the user, so the user ID requires recertification. Domino enables administrators to move users to other locations by using the *Administration Process* (AdminP). Administrators can use AdminP to change a user's name, assign a new Organizational Unit, or add the user's information to a completely new organization. Moving a user requires the original certifier as well as the certifier for the new location.

The administrator must have the certifier and Editor access to the Administration Requests database in order to move a user. Follow these steps to move a user in the domain:

1. Launch the Domino Administrator and select the People & Groups tab. Click People and choose the user to be changed.
2. Using the Tools pane, select People and Rename. A dialog box appears with the following three choices:

- Upgrade to Hierarchical
 - Change Common Name
 - Request Move to New Certifier
3. To change the number of days that the old user name and information will be honored, edit the entry option at the bottom of the Honor Old Names for Up to XX Days dialog box. The default option for this selection is 21 days, but the value can be changed to reflect a number from 14 to 60 days.
 4. To move the user, click the Request Move to New Certifier button; the Choose a Certifier dialog box appears. Choose from among the following options:
 - Choose the Server option to select the registration server.
 - Choose the Supply Certifier ID and Password option to use a certifier ID file. A dialog box is available under this option that enables you to navigate to the ID on the server.
 - Use the CA Process option to make the changes without having access to a certifier ID file.
 5. After you have selected one of the preceding options, click OK to continue. If you selected the option to use a certifier ID, a dialog box titled “Lotus Notes” appears requesting the password. Enter the password and click OK to continue.
 6. A dialog box now allows the administrator to assign a new certifier ID. Select the ID and click OK to continue.
 7. The Rename Person dialog box appears. The Primary Name Information displays and a check box is presented with the following text:

Allow the primary name to be changed when the name is moved.

This is optional, and all systems must be running Domino versions 5.04 or greater to support this option. Select OK to continue; the change is processed and a Processing Statistics dialog box appears displaying the results of the change process.
 8. Click OK to close the dialog box and return to the Administrator client.

Changing a User's Name

Users may also require a name change to their account information in the Domino Directory. To change a user's name, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab. Click People and choose the user to be changed.
2. Using the Tools pane, select People and Rename. In the People and Rename dialog box, select the Change Common Name option; the Choose a Certifier dialog box appears.

**NOTE**

At the bottom of the People and Rename dialog box is the Honor Old Names for Up to XX Days option. The default option for this selection is 21 days, but the value can be changed to reflect a number from 14 to 60 days.

3. As in step 4 of the preceding list of steps (see “Changing a User's Location in the Hierarchy”), select an option for choosing a certifier, and then click OK to continue. If you choose the option to use a certifier ID, a dialog box appears requesting the password. Enter the password and click OK to continue.
4. The Certificate Expiration Date dialog box appears. The default set in this box is two years from the current date. Change the date if required or leave it at the two year default and click OK to continue.
5. The Rename Person dialog box appears with fields to be completed. Complete these fields:
 - ▶ First Name
 - ▶ Middle Name
 - ▶ Last Name
 - ▶ Qualifying Org Unit (optional)
 - ▶ Short Name (optional)
 - ▶ Internet Address (optional)
 - ▶ Rename Windows NT User Account (optional)
6. After you have completed the fields required for this user, click OK. The name change is processed and the Processing Statistics dialog box appears displaying the results of the change process.
7. Click OK to close the dialog box and continue.

Deleting Groups

Groups can be deleted from the Domino Directory, but only after the administrator has taken the proper steps to prepare for the deletion. Deleting a group can have extremely detrimental effects on the domain, as server and user access will change based on the group deletion. Make sure that all domain administrators and users are prepared for the deletion of the group by sending an email to the affected users before the group is deleted.

Deleting a group requires an administrator to have the following access:

Author access with the ability to delete documents and the GroupModifier role

Or

Editor access to the Directory

To delete a group, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab. Click Groups and select the group to be deleted; a Delete Group dialog box appears.
2. Choose from these options in the Delete Group dialog box:
 - ▶ Delete Group's Windows NT/2000 Accounts, if Existing.
 - ▶ Delete Groups from This Domino Directory Immediately.
3. After selecting either of these options, click OK to delete the group.

Deleting Users

Deleting a user requires an administrator to have the following access:

Author access with the Create Documents access to the certification log

And

Author access with the ability to delete documents and the UserModifier role assigned

Or

Editor access to the Domino Directory

The following steps should be taken to delete a user from the Domino Directory:

1. Launch the Domino Administrator and select the People & Groups tab. Click People and select the user to be deleted.
2. Select People from the Tools pane and choose Delete. The Delete Person dialog box appears, prompting you to choose an option to determine what should happen to the user's mail database. The available options are
 - ▶ Do Not Delete the Database
 - ▶ Delete the Mail Database on the User's Home Server
 - ▶ Add Deleted Users to Deny Access Group (optional)
 - ▶ Delete User's Windows NT/2000 Accounts, if Existing
 - ▶ Delete Users from This Domino Directory Immediately
3. Complete the required selections and click OK to delete the user.

Extending a Notes ID's Expiration Date

A *Notes ID's Expiration Date* is used to manage when an ID will no longer be able to access a server. Typically user ID expiration dates are set for an extended amount of time, such as ten years, so that administrators are not required to constantly recertify IDs.

Extending the date on a Notes user ID requires the ID to be recertified. Complete these steps to change the expiration date of an ID:

1. Launch the Domino Administrator and select the People & Groups tab. Click People and using the Tools pane, select People, and then select Recertify.
2. In the Choose a Certifier dialog box, choose an option (see step 4 in stepped procedure outlined in "Changing a User's Location in the Hierarchy," earlier in the chapter), and then click OK to continue. If the option to use a certifier ID was selected, a dialog box appears requesting the password. Enter the password and click OK to continue.
3. The Renew Certificates in Selected Entries dialog box appears. In the New Certificate Expiration Date field, change the date to reflect the desired expiration date and then click OK to continue.
4. The Recertify User dialog box appears showing the common name and the qualifying org unit. Click OK to continue.

5. The user ID recertification is processed and the Processing Statistics dialog box appears displaying the results of the change process. Click OK to close the dialog box and continue.

Managing Groups

Group management is used by administrators to add or delete users and servers from groups and to create new groups as needed. Group management tasks are performed using the Administrator client. To manage groups, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab.
2. Click Groups and select the required group. Using the Tools pane, select Groups, and then select Manage. The Manage Groups dialog box appears (see Figure 15.1).

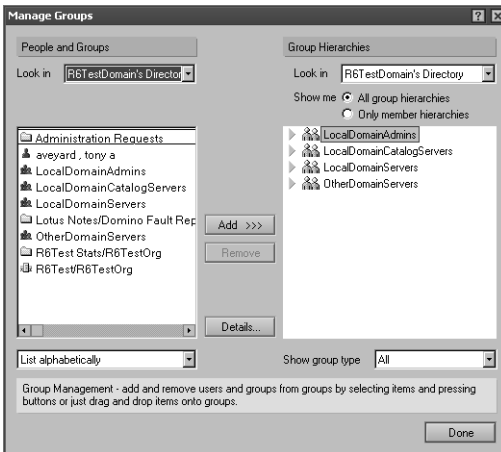


Figure 15.1 Domino users, groups, or servers data types can be added or removed from groups using the Manage Groups tool.

3. To add a data type to a group, select the data type from the People and Groups section on the left. Expand the destination group under the Group Hierarchies section on the right. Click Add to add the data type to the target group.
4. To remove a data type from a group, expand the group under the Group Hierarchies section, select the data type to be deleted, and click Remove.
5. Click Done when finished.

Modifying Person Documents

User management includes adding and deleting users, recertifying user IDs and moving users in the domain. The Administrator client is used for user management.

The Person document contains all of the information related to the user that determines access and rights related to how the user interacts with the domain. When changes such as the name or title are made to the user's information, the changes are recorded in the Person document. To edit the Person document, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab.
2. Click People and choose the user to be modified, and then select Edit Person.
3. Make the changes desired to the Person document and select Save & Close to save the changes.

Moving a User's Mail File

User mail files may need to be moved when a user changes departments or moves to another location in the country that supports his new Domino needs. Domino provides a tool that moves the user's mail file and changes the Directory to reflect the new mail file location. To move a user's mail file, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab. Click People and using the Tools pane, select People, and then select Move To Another Server to produce the Move Users(s) To Another Server dialog box. The selected user is displayed in the dialog box along with a drop-down box used to select the destination server.
2. Choose from these available options:
 - ▶ Move Roaming Files into This Folder on "Server Name"
 - ▶ Move Mail Files into This Folder on "Server Name"
 - ▶ Link to Object Store
 - ▶ Delete Old Replicas in Current Cluster
3. Click OK to complete the process of moving the mail file.

Renaming Groups

Groups can be renamed using the Administrator client. Editing a group requires ACL access to the Domino Directory with one of the following defined security assignments:

At least Editor with Create Documents privilege

Or

The UserModifier role



Care should be taken when renaming a group, because renaming a group affects users and their access within the domain. In the event that a group needs to be renamed, notify the users and system administrators who communicate with the server.

Follow these steps to rename a group:

1. Using the Domino Administrator client, navigate to the People & Groups tab.
2. Expand the Domino Directories item and select Groups. A list of the valid groups on the server displays in the main navigation window. Select the group that needs to be edited and then click Edit Group.
3. On the Basics tab, change the name of the group and click Save & Close to save the group using the new name.

Setting Up Roaming Users

Roaming users are able to access Notes from multiple clients in the domain and retain their personal information. A roaming server is used to store the user's files. When a user logs on to the server as a roaming user, the user's information is retrieved from the server and presented to the user. When a roaming user makes changes, the user is replicated to the server so that the server is available when the user logs in at a later time.



Roaming users are unique to Domino. In preparing for the exam, you should study the concepts surrounding how to define them. Set up roaming user configurations in a development domain to ensure that you understand all of the processes.

Roaming users are created during user registration. To define the settings for roaming users, follow these steps:

1. Launch the Domino Administrator and select the People & Groups tab.
2. Using the Tools pane, select People, then select Register. A Lotus Notes dialog box appears requiring the certifier password. Enter the password and click OK to continue.
3. The Register Person—New Entry dialog box appears. Enter the relevant user information related to name and password, and then select Enable Roaming For This Person.
4. Click the Advanced button and a new menu displays on the left. Select the Roaming tab to configure the Roaming settings; the Roaming tab is shown in Figure 15.2.

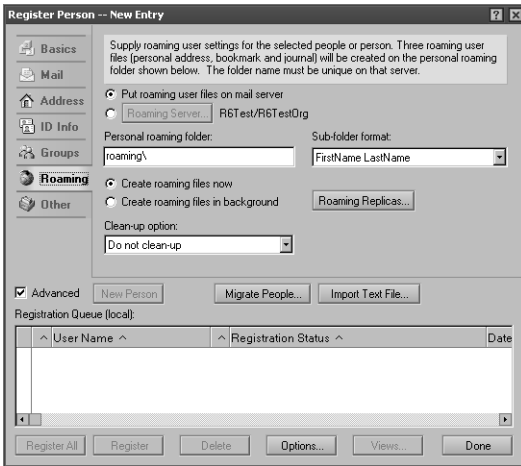


Figure 15.2 When roaming users are created, the files Personal Address, Bookmark, and Journal are also created and stored based on the settings here in the Roaming tab.

5. Complete these fields to set up Roaming:
 - ▶ Put Roaming User Files on Mail Server, or click the Roaming Server button to select the location to store the files.
 - ▶ Enter the personal roaming folder in the Personal Roaming Folder text box.
 - ▶ Choose a subfolder format from the Sub-Folder Format drop-down list.

- ▶ Create Roaming Files Now or Create Roaming Files in Background.
- ▶ Roaming replicas are available if a Domino cluster is available.
- ▶ Select a Clean-up option from the Clean-Up Option drop-down list.

6. Select the required options and click Done to create the roaming user.



Typically, the exam may contain questions related to moving users to new servers or changing where a user may exist in the hierarchy. Be sure while studying that you understand examples of creating users and groups and that you test your understanding of the process in a development environment.

Exam Prep Questions

Question 1

Which ACL access is required to the Domino Directory to allow an administrator to edit a group?

- A. Editor with the Create Documents privilege
- B. Editor with Document Copy privilege
- C. UserModifier role
- D. ModifyUser role

Answers A and C are correct. Editing a group requires ACL access to the Domino Directory with one of the following defined security assignments:

At least Editor with Create Documents privilege

Or

The UserModifier role

Question 2

Which Domino task is used to move users to other servers or domains?

- A. Catalogger
- B. AdminP
- C. Userlocator
- D. Filer

Answer B is correct. Domino users are moved to other servers or domains by using the Administration Process (AdminP).

Question 3

When moving a user, which two things are required to complete the move to a new server?

- A. The original certifier
- B. The user's public key
- C. A replica copy of the NAMES.NSF database
- D. The certifier for the new server location.

Answers A and D are correct. Moving a user requires the original certifier as well as the certifier for the new server location.

Question 4

When changing a user's name, which of the following statements is true about date expiration on the user ID?

- A. The default time for certificate expiration is 10 years.
- B. The certificate expiration time cannot be changed.
- C. The default time for certificate expiration is two years.
- D. The certificate expiration time is based on the server certificate expiration parameter.

Answer C is correct. The default time for the certificate expiration time is two years from the current date, but can be changed to any number.

Question 5

When are roaming users created?

- A. During nightly batch system processing
- B. During registration
- C. During NAMES.NSF domainwide replication
- D. During server launch

Answer B is correct. Roaming users are created during user registration.

Question 6

What does an administrator select to set up roaming for a user?

- A. Set Roaming=1 in the NOTES.INI file.
- B. Select Enable Roaming for This Person on the registration page for a new user.
- C. Define the group RoamingUsers in the Domino Directory.
- D. Set the RoamingUsers task to launch at server startup in the server's configuration document.

Answer B is correct. Select Enable Roaming for This Person in the Register Person—New Entry dialog box.

Question 7

Which files are created for roaming users to retain their roaming information?

- A. Roamer, Filer, and Journal
- B. Personal Address, Bookkeeper, and Replicator
- C. Personal Address, Bookmark, and Journal
- D. Addresser, Personal Bookmarks, and Journal

Answer C is correct. When roaming users are created, the files Personal Address, Bookmark, and Journal are also created and stored based on the settings on the Roaming tab.

Question 8

Which tab in the group document is used to change the name of a group?

- A. The Groups Definition tab
- B. The Basics tab
- C. The ILOP tab
- D. The Security tab

Answer B is correct. Change the name of the group on the Basics tab of the group document and click Save & Close to save the group using the new name.

Need to Know More?



The Lotus Developers Domain: www-10.lotus.com/1dd.



Upgrading to Domino 6: Performance Benefits: www.ibm.com/redbooks.