



Click Studios

Passwordstate

Local Logins to Active Directory Migration

Table of Contents

- 1 INTRODUCTION.....3
- 2 MIGRATION PROCESS4

1 Introduction

This document will describe the steps required to convert to Active Directory authentication from Local Logins authentication. These steps are primarily required due to the way the UserID field is encrypted throughout the database, with the format being different for both types of authentication.

2 Migration Process

Step 1:

1. Upgrade Passwordstate to the latest build available, using this document as a guide: https://www.clickstudios.com.au/downloads/version9/Upgrade_Instructions.pdf. If you are running Passwordstate build 9435 or higher, this step is not required.

Step 2:

1. Go to the screen **Administration** -> **Email Templates**, and disable all templates
2. Go to the screen **Administration** -> **Privileged Account Credentials**, and specify a domain account which has read access to Active Directory for the account '**Read Active Directory Security Groups and User Accounts**'. Typically the Security Group "Domain Users" will provide read access to your Active Directory environment.
3. Go to the screen **Administration** -> **Active Directory Domains**, and add in the new domain information and set it as the default domain. Select the appropriate Privileged Account from the step above
4. Now go to the screen **Administration** -> **User Accounts**, and click the **Add From AD** button to create an account for yourself from the new domain – if you don't have enough licenses for this, you can disable any one of the existing user accounts as disabled accounts don't count against licensing
5. With this new account, go to the screen **Administration** -> **Security Administrators**, and grant the account access to all Roles – If this option is greyed out, please see this forum post for more information about how to enable this: [Using Emergency Access to Grant new Security Administrator Roles - General FAQs - Click Studios Community](#)
6. Now log out of Passwordstate, and then try logging back in with this new account
7. If the login with the new account was successfully, then move on to **Step 3** below

Step 3:

1. Go to the screen **Administration** -> **User Accounts**, and disable all the other Local Accounts – this is so that you have sufficient licenses to create the new domain accounts
2. Now create the new accounts you need for the new domain by using the '**Add from AD**' button (If you have a large number of accounts, you can instead add an Active Directory Security Group that contains all the users. Adding a Security Group will sync all those users into the system. This can be performed under **Administration** -> **Security Groups**)
3. While still on the User Accounts screen, click on the '**Clone User Permissions**' button, and clone permissions between the domain accounts as appropriate (note this will clone permissions only, not any of the user's Preferences settings). If you have a large number of users, we have introduced a "**Bulk Clone**" feature as of Build 8215. This can be found on the "**Clone User Permissions**" screen and requires you to generate and populate a .csv file, and reimport it back into Passwordstate. Ensure when cloning each user, you select the '**Move any Private Password Lists from the Source user to the Destination user**'
4. Once this is done, if you are using Security Groups at all for applying permissions, you now go to the screen **Administration** -> **Security Groups**, add the appropriate Security Groups from the Active Directory domain, and then clone permissions between the security groups, just like you did for users. Note: This step is not required if you prefer to continue using "Local" security groups, as opposed to domain groups
5. Now you can delete any old User Accounts or Security Groups
6. Go to the Screen **Administration** -> **Email Templates**, and enable all templates
7. Restart the Passwordstate Windows Service

Step 4:

There may be a few other things you need to check as well i.e.

1. Screen **Administration** -> **System Settings** -> **Email Alerts & Options**. Possibly your email server settings may need changing
2. Screen **Administration** -> **Backups and Upgrades**. If you're using this feature, you may need to change the account here which is used to perform the backups
3. If you are using any of the Password Reset features/scripts, go to the screen **Administration** -> **Privileged Account Credentials**, and update each of the records here with accounts in the new domain as appropriate