

# Release Note

## RM Unify CSV Extraction Tool

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### About this Release Note

This Release Note is written for system administrators with Windows Server® networks, including Community Connect 4 (CC4) and CC3 networks. It gives instructions for installing or upgrading the RM Unify CSV Extraction Tool, and for using it.

# About the RM Unify CSV Extraction Tool

## What it does

RM Unify is single sign-on system, application library and management system for Cloud services.

The RM Unify CSV Extraction Tool lets you export school network user accounts from Microsoft® Active Directory (AD) for use with RM Unify, to enable students and school staff to access Cloud services with the same username as they use on the local school computers.

User accounts can be mapped from your AD to RM Unify roles using a variety of methods including User Profile location, AD Organisational Unit structure and group membership. The tool can automatically generate random secure passwords for new accounts.

## Requirements

The CSV Extraction Tool is supported on Windows Server AD networks.

On CC4 networks we recommend you install it on the CC4 First server. On other networks (including CC3) it can be installed on a domain controller or member server.

On the network:

- Microsoft Active Directory (the AD Forest and Domain functional levels must be Windows Server 2003 or above)

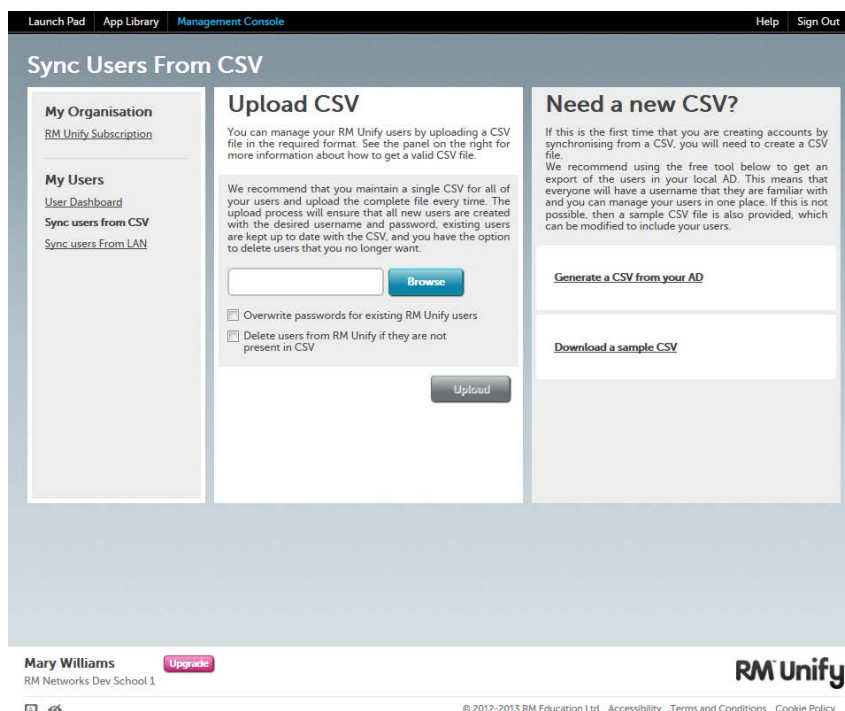
On the server where the tool is installed:

- The OS must be Windows Server® 2003, Windows Server 2008 R2 or Windows Server 2012.
- .NET Framework v3.5 SP1 must be installed.  
To check for its presence or install it, see 'Appendix I: Installing .NET Framework v3.5 SP1' for instructions.

## Downloading the CSV Extraction Tool

If you have an RM Unify account, you can download the CSV Extraction Tool from the RM Unify website:

1. Log on to RM Unify with an RM Unify Administrator account.
2. From the top menu choose Management Console.
3. Click 'Sync users from CSV' in the left-hand list.



4. Click the 'Generate a CSV from your AD' link.
5. On the download page, follow the instructions to download and extract the RM\_Unify\_CSV\_Extraction\_Tool\_vX.X.zip file.

## Installing or upgrading the CSV Extraction Tool

If you have a previous version of the CSV Extraction Tool installed, it must be uninstalled before the new version is installed.

### To check for and uninstall an existing version

1. If the RM Unify CSV Extraction Tool may have previously been installed on your network, check for its presence on your servers. On a CC4 network we recommended installing it on the CC4 First server. On other networks including CC3 networks, it could be installed on a domain controller or member server.

#### *Windows Server 2003*

- i. From the Start menu open Control Panel.
- ii. Choose Add or Remove Programs.
- iii. Check the list of installed programs for RM Unify CSV Extraction Tool.

#### *Windows Server 2008 R2*

- i. From the Start Menu open Control Panel.
- ii. Choose Programs, Programs and Features.
- iii. Check the list of installed programs for RM Unify CSV Extraction Tool.

*Windows Server 2012*

- i. From the Start screen open Control Panel.
  - ii. Choose Programs, Programs and Features.
  - iii. Check the list of installed programs for RM Unify CSV Extraction Tool.
2. If the CSV Extraction Tool is installed, uninstall the current version:
- i. In the list of installed programs, select the RM Unify CSV Extraction Tool and click Uninstall.
  - ii. If prompted, click Yes to confirm the uninstallation.
  - iii. Close the window when finished.

**To install the new version**

1. Choose the server where the CSV Extraction Tool will be installed.
  - *CC4 networks*  
We recommend that you install the extraction tool on your CC4 First server, as this allows the tools to automatically detect your network settings and to access additional information in the CC4 Database, such as the Year Of Entry and UPN / Staff ID fields. (Except in CC4 TEN/Matrix environments, the CC4 First server is the Forest Root Domain Controller.)
  - *Other networks (including CC3)*  
Install the extraction tool on a domain controller or on a member server.
2. Log on to the chosen server as the Windows administrator user (not as a CC4 system administrator).
3. Browse to the location where you extracted the files from the RM\_Unify\_CSV\_Extraction\_Tool\_vX.X.zip download file. If the extracted files are not on this server, copy them to a convenient local folder.
4. Double-click the file **RMUnifyCSV.exe**
5. Click Continue.
6. Click Finish.

The installer creates a shortcut for the tool in Programs\RM\RM Unify CSV Extraction Tool on the Start menu or Start screen.

Before using the tool, you will need to decide how to map your network user accounts to appropriate roles in RM Unify.

# Mapping users to RM Unify roles

## RM Unify Roles

RM Unify currently supports three user roles for automated provisioning:

- Students
- Teaching Staff
- Non-Teaching Staff.

When importing users to RM Unify you need to specify the mappings of Active Directory accounts to the roles above.

Some networks support additional user types, for example System Administrators and Associates. You can map multiple local roles to a single RM Unify role. For example, you may choose to map Associate user types to the RM Unify Non-Teaching Staff role.

On a CC4 network the RM Unify CSV extraction tool will automatically select appropriate role mappings to get you started. However you may want to add mappings for additional user types, for example System Administrators and Associates.

## Mapping Types

The RM Unify CSV Extraction Tool provides three alternative methods of mapping user accounts in your network to these RM Unify user roles: Profile Path, Organisational Unit and Group Membership.

### Profile Path

This method uses the AD User 'Profile Path' attribute. It detects the Windows share name used in the user's profile path and compares it with the string provided.

The Profile Path method is used by default for CC4 networks, because CC4 uses specific share names for different user types. Student user profiles, for example, are all accessed through a common share name of 'RMStudentProfiles'.

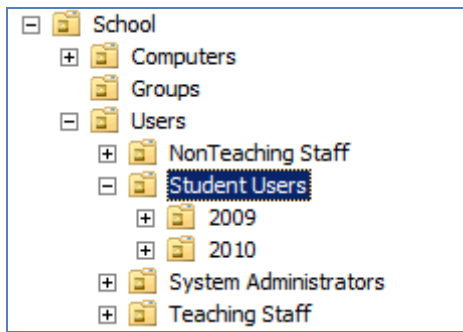
This method is also suitable for CC3 networks and other Windows Server networks that use specific share names for different user types. For a table of CC4 and CC3 default mappings, see 'Appendix II: Community Connect default role mappings'.

### Organisational Unit

This method uses your Organisational Unit (OU) structure within Active Directory. If your establishment has an AD structure that differentiates user types by OU location, this is an appropriate mapping method for you.

The string will match against any OU that appears in the path of a user account.

For example, if the OU structure is:



the common OU for all Students is 'Student Users', which includes users in all subordinate OUs. In this case the Organisational Unit rule would be to match the string "Student Users".

In the same example, for Non-Teachers you would set the Organisational Unit to match the string "NonTeaching Staff".

### Group Membership

This method maps users by AD group membership.

This method should be used if the other methods above cannot be implemented in your network – for example, if you have a flat AD OU structure and fixed profile paths for all users. You can use either your existing user groups, or create new groups specifically for RM Unify. The Group Membership rule would be to match a string that equals the group name.

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**Note** If you use the Group Membership method, checking is slower than with other methods.

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## Using the CSV Extraction Tool

Using a CSV file to create or update user accounts in RM Unify is a three-step process:

1. Run the CSV Extraction Tool to create the CSV file.
2. Open the file in a CSV editor (for example, Microsoft<sup>®</sup> Excel) to check its contents.
3. Upload the CSV file from the RM Unify Management Console.

### Creating the CSV file

To launch the RM Unify CSV Extraction Tool:

1. From the Start menu choose All Programs, RM, RM Unify CSV Extraction Tool, RM Unify CSV Extraction Tool.exe.

2. The RM Unify CSV Extraction Tool window is displayed (the illustration below is for a CC4 network.):

RM Unify Role	Mapping Type	Search Value
Student	Profile Path	RMStudentProfiles
Non-Teacher	Profile Path	RMNonTeacherProfiles
Teacher	Profile Path	RMTeacherProfiles

AD Search Path:

Initial Passwords:  
 Generate a random 8 character password for each user  
 Set a default password  
 Default Password:

CSV Output Path:

Enter the required information as follows:

- **RM Unify Role Mapping**

On a CC4 network, standard Unify Role Mapping rules are populated automatically, so you may not need to add any mappings.

On other networks, including CC3 (and on CC4 if you want to add further mappings), use the Add button to add each new rule for mapping local network user accounts to the available Unify roles (see 'Mapping users to RM Unify roles' on page 5).

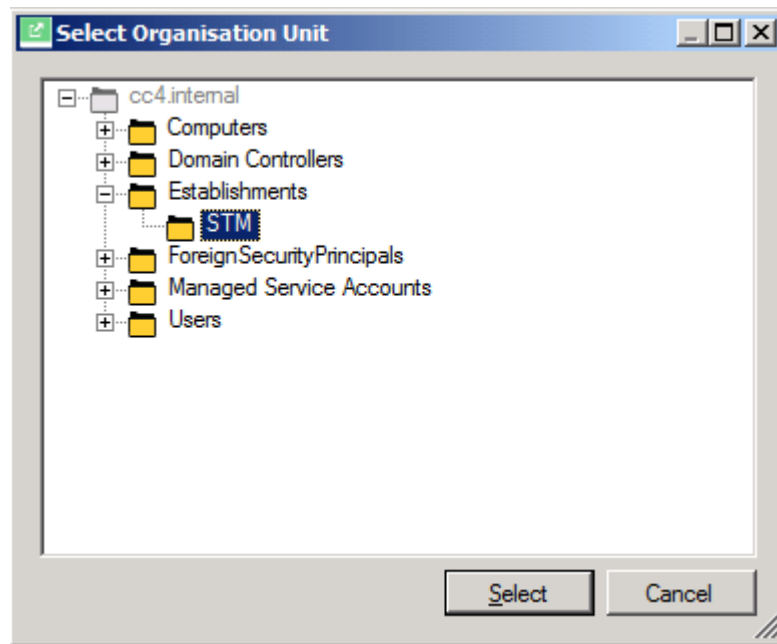
RM Unify Role:

Mapping Type:

Search Value:

On CC4 and CC3 networks, Profile Path is the recommended method for mapping users.

- **Active Directory**  
On a CC4 network AD Search Path is populated automatically.  
On other networks, use the Browse button to select the appropriate AD Search Path for your users.



- **Initial Passwords**  
Choose the option you want for setting initial passwords.
- **CSV Output Path**  
Use the Browse button to select the destination folder for your CSV file.

3. Click Extract.
4. When the extraction is finished, a summary is displayed showing the number of users extracted and mapped to each RM Unify Role.
5. Click OK and Exit to close the windows.

## Checking the CSV file

The extraction tool generates a CSV file named `rmunify_date_time.csv` which should include all the relevant information from your network.

However some information you need may not be present. Therefore it's important to review the output before using the file to populate RM Unify.

The following fields are included:  
(\*asterisks indicate mandatory fields for RM Unify)

- PersonID
- Username\*
- Password\*
- DisplayName\*



- FirstName\*
- LastName\*
- Role\*
- YearOfEntry
- HomeEmailAddress
- MisId

PersonID, Username, Password, DisplayName and Role will always be present on an Active Directory network. It is important that these fields are not altered.

FirstName and LastName may not be present in all systems. If so you must populate these fields in the CSV file before uploading it. Rather than edit the file, we recommend that you populate these fields in your network management solution, where that is supported. On CC4 networks you can do this in the RM Management Console (see Managing User Properties topics in Users Help). On other Windows Server networks this may be done using AD Users & Computers.

For YearOfEntry the convention is to enter the year that a student would enter your school if they joined in the usual entry cohort. For consistency we suggest you apply the following rules:

- For a primary school: the year if they entered at Year 1.
- For a secondary school: the year if they entered at Year 7.

This information provides a convenient way to group users into year groups within RM Unify for controlling access to cloud services.

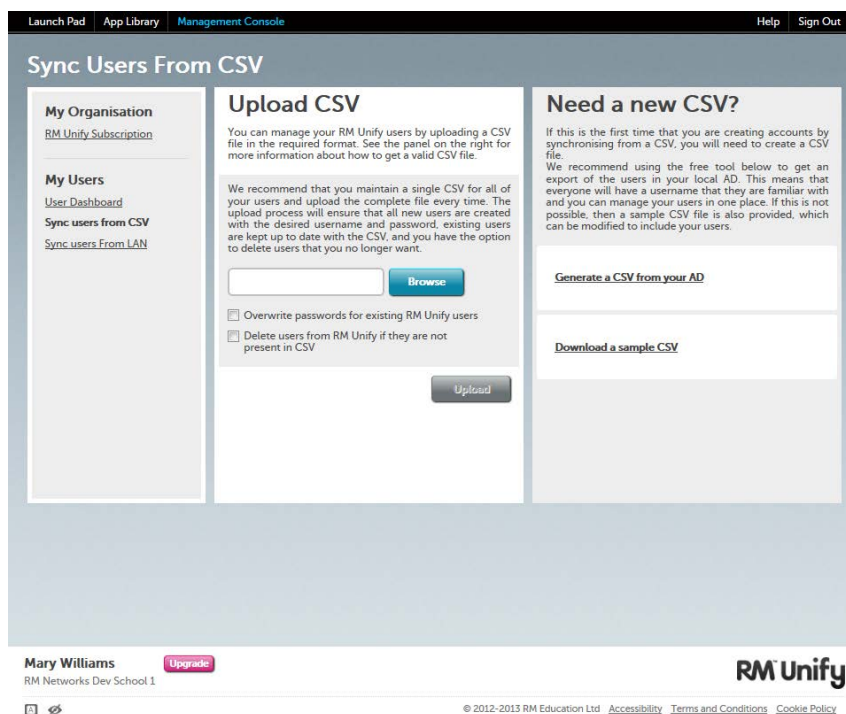
The optional fields HomeEmailAddress and MisId are not present in all systems. Do not enter data in the MisId field manually, as it uses a specific data format (it is populated automatically on CC4 networks from the 'UPN/StaffID' value).

A sample CSV file is provided for reference in the RM Unify Management Console.

## Uploading the CSV file

To upload your CSV file to RM Unify:

1. Copy your CSV file to a workstation with an Internet browser.
2. Log on to RM Unify with an RM Unify Administrator account.
3. From the top menu choose Management Console.



4. In the left-hand pane choose 'Sync users from CSV'.
5. Click Browse, locate your CSV file and select it.
6. If required, tick the box to select one or both the following import options:
  - **Overwrite password for existing RM Unify users**  
Use this if you want to reset existing RM Unify passwords to those provided in the CSV file.

If this option is not ticked, the passwords in your CSV file will only apply to new user accounts.

- **Delete user from RM Unify if they are not present in CSV**  
Use this if you want to delete existing RM Unify accounts for students that have been removed from your network, for example at the end of the school year.

If this option is not ticked, the accounts in the CSV file will be added to the existing RM Unify accounts.

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**Note** If you have a Standard Unify account and choose the 'Delete user...' option, the only RM Unify accounts that will remain are those defined in the CSV file.

**All existing Unify accounts that are not present in the CSV file will be permanently deleted.**

However if you have a Premium account and also use AD Sync to provision users, then when you choose the 'Delete User...' option the only users that are permanently deleted are CSV-created users that are not in the CSV file. Existing AD-created users are not affected.

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7. Click Upload and follow the on-screen instructions to complete the upload.  
Depending on the number of accounts, the upload may take several minutes.  
The instructions will provide further guidance in the event of an error.

This completes the import of your users into RM Unify. For each mapping type you have defined, check that a user can successfully log on to RM Unify with their initial password.

## Appendix I: Installing .NET Framework v3.5 SP1

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**Note** Depending on your current version of .NET Framework, a server reboot may be required.

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### Windows Server 2003

1. Confirm whether .NET Framework version 3.5 SP 1 is installed.

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**Note** .NET Framework 3.5 SP1 is installed by default on all CC4 SR2 servers.

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- i. From the Start menu open Control Panel.
  - ii. Choose Add or Remove Programs.
  - iii. Check the list of installed programs for 'Microsoft .Net Framework 3.5 SP1'.
2. If required, install .NET Framework version 3.5 SP1:
  - i. Download the latest version of .NET Framework version 3.5 SP1.
  - ii. Follow the instructions at this URL:  
<https://www.microsoft.com/en-gb/download/details.aspx?id=22>
  - iii. Repeat step 1 above to confirm the component has installed successfully.

### Windows Server 2008 R2

1. Confirm whether .NET Framework version 3.5 SP1 is installed.

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**Note** .NET Framework 3.5 SP1 is installed by default on all CC4 Windows Server (WS) 2008 R2 servers.

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- i. Run PowerShell by clicking the PowerShell icon on the Taskbar. Alternatively, on a WS 2008 R2 Core server, type **powershell** in the Command Prompt window and press Enter.
  - ii. Type **import-module servermanager** and press Enter.
  - iii. Type **Get-WindowsFeature -Name NET-Framework-Core | fl Installed** and press Enter.  
  
The display will indicate whether or not the component is installed.
2. If required, install .NET Framework version 3.5 SP1:
  - i. Type **Add-WindowsFeature -Name NET-Framework-Core** and press Enter.
  - ii. Repeat step 1 above to confirm the component has installed successfully.

## Windows Server 2012

1. Confirm whether .NET Framework version 3.5 SP1 is installed.

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**Note** .NET Framework 3.5 SP1 is installed by default on all CC4 Windows Server (WS) 2012 servers.

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- i. Run PowerShell by clicking the PowerShell icon on the Taskbar. Alternatively, on a WS 2012 Core server, type **powershell** in the Command Prompt window and press Enter.
- ii. Type  
**Get-WindowsFeature -Name NET-Framework-Core | fl Installed**  
and press Enter.

The display will indicate whether or not the component is installed.

2. If required, install .NET Framework version 3.5 SP1 as follows. You will need the original Windows 2012 installation media. For the following example this is assumed to be in drive E:

- i. Type  
**Install-WindowsFeature -Name NET-Framework-Core -source E:\sources\sxs**
- ii. Repeat step 1 above to confirm the component has installed successfully.

## Appendix II: Community Connect default role mappings

The default role mappings from CC4 to RM Unify are as follows:

CC4 User Type	Profile Path	RM Unify Role
Students	RMStudentProfiles	Student
Non-Teaching Staff	RMNonTeacherProfiles	Non-Teacher
Teaching Staff	RMTeacherProfiles	Teacher
Associates	RMAssociateProfiles	Not specified
System Administrators	RMSysAdminProfiles	Not specified

These rules are also relevant for CC3 networks.