

NHSmail - TANSync Filter Guide

Version 1.0

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1 Overview

1.1 Document's Intended Audience

NHSmal delivers a national directory service enabling day to day communications across health and social care organisations. The service enables organisations to provide regular and automated updates to people data from a wide variety of sources.

This document has been produced for a technical audience who have an understanding of the installation of Microsoft products and have experience working with identity products such as ILM, FIM or MIM and have the TANSync solution installed e.g:

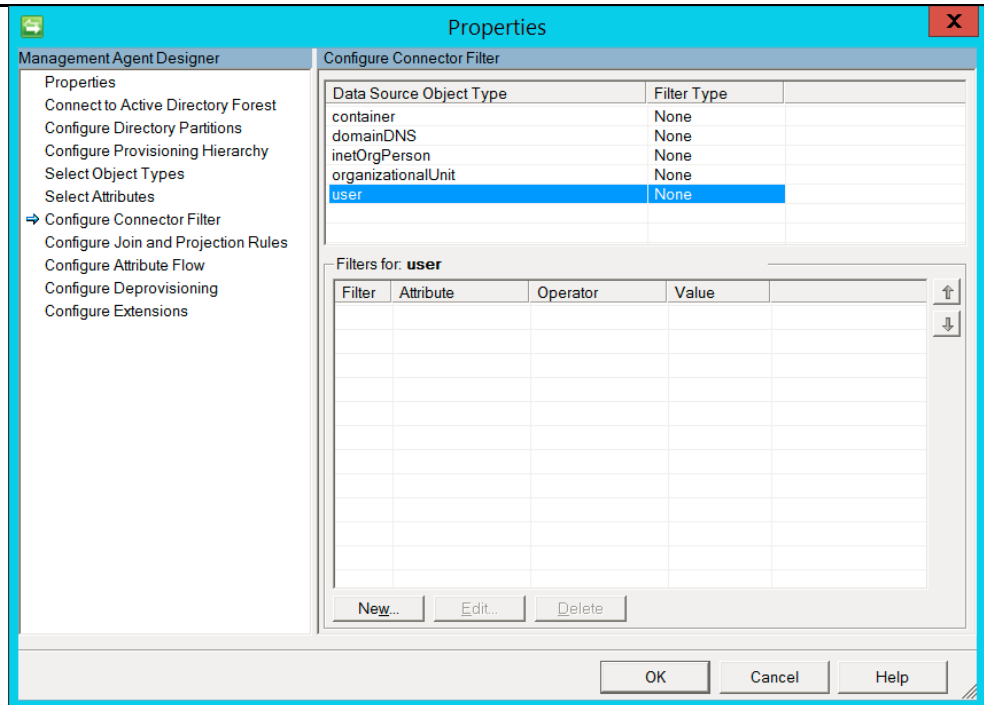
- End Users
- Training and Business Change Managers
- Local Administrators (LAs)
- IT Managers

It is recommended that readers also reference the TANSync Overview Guide and the TANSync Deployment Guide for context before reading this document. These documents can be located on the NHSmal Support Site.

2 Introduction

Organisations can use TANSync to automatically provision both mailbox users and Contacts by pushing information from a local Active Directory or SQL Database, into the NHS Portal. The Portal then syncs the information into the NHSmal Exchange and Active Directory servers. There may be cases when user information stored within the local Active Directory or SQL should not be used to provision new NHSmal mailboxes. During your installation you can create a filter on the management agents (ADMA/SQLMA) within TANSync to stop these users from being provisioned mailboxes. Any user who meets the conditions specified in the filters will become a "filtered disconnecter", meaning they will not be synced into the Portal and therefore will not get an NHSmal mailbox. This allows the TANSync configuration to have a greater amount of control on how users are provisioned into the Portal, without needing to change the local Active Directory or SQL Database. This document provides an overview of how to set these filter requirements, both simple filters and advance filters.

From the “Data source Object Type” list, select “user” and click “New” at the bottom

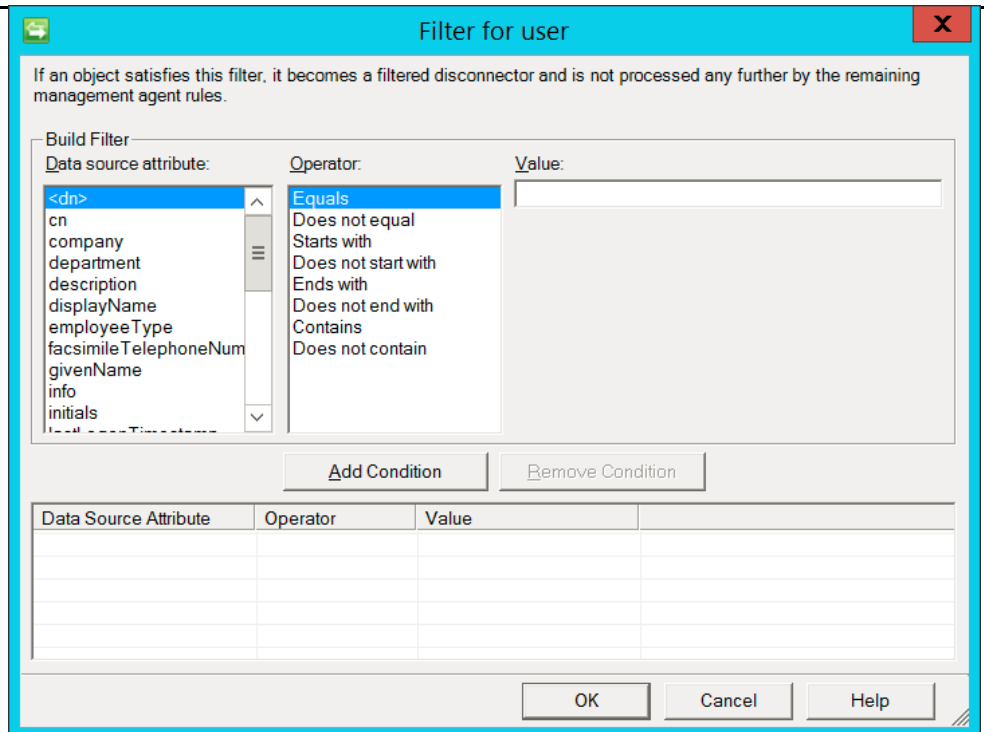


On this screen you can set up your filter.

On the right in the “Data Source Attribute” section, select the attribute you wish to use as a filter.

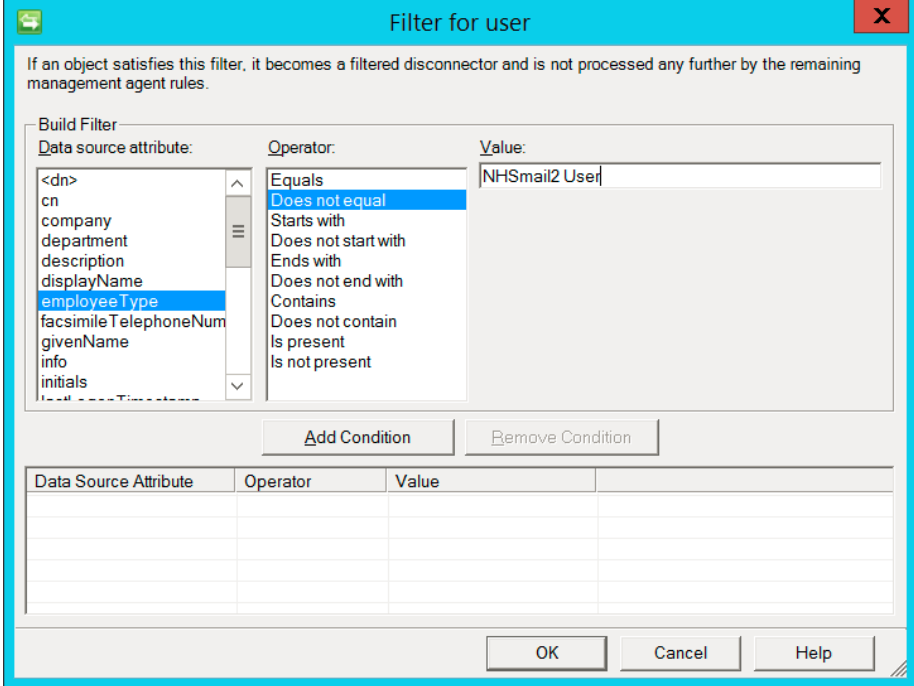
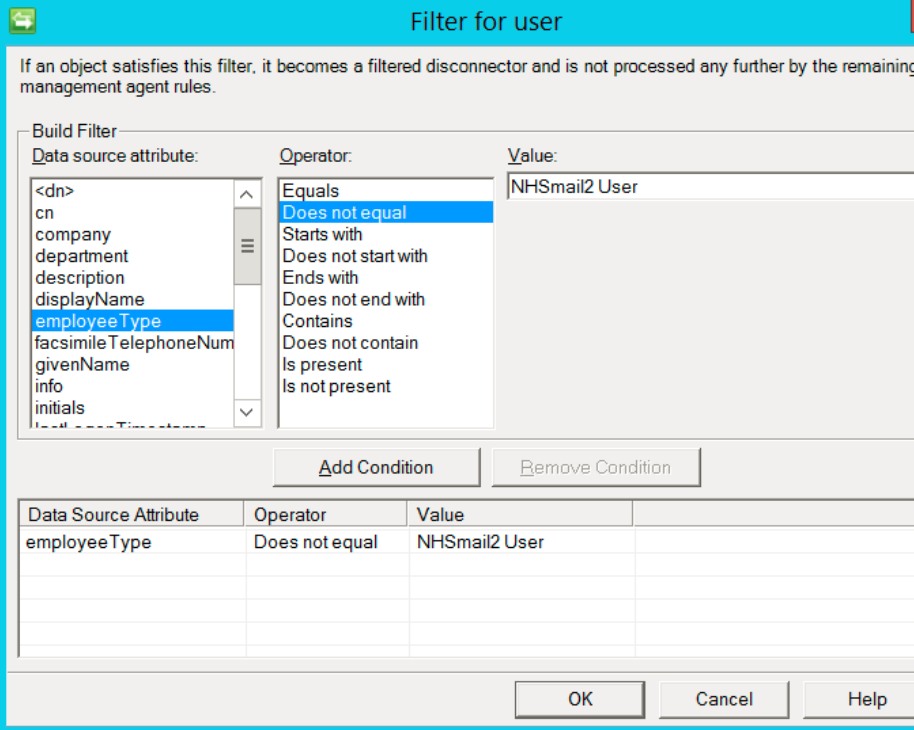
In the middle in “Operator” section, this is where you select what filter you wish to use.

In the middle in “Value” section, this is where you input the value of the attribute you wish to search for.



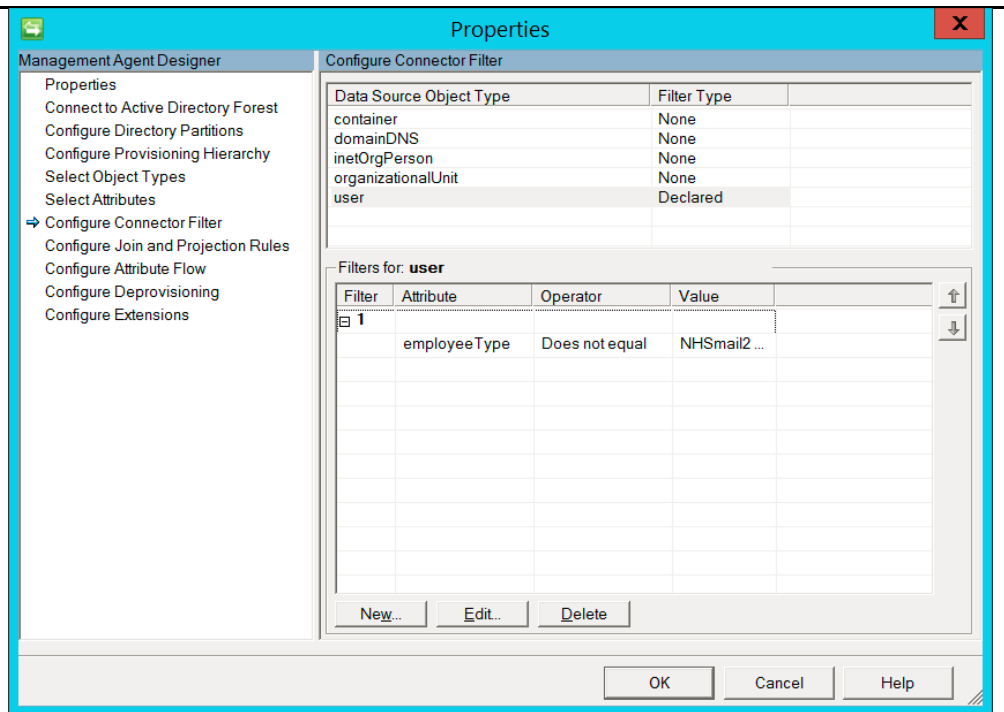
4 Configuring Simple Connector Filters

ADMA/SQLMA allows you to configure the filter which contains only one rule criteria to which AD/ SQL information must comply to, in order to be considered a filtered disconnector. These are known as simple filters, below details steps to configure a simple filter:

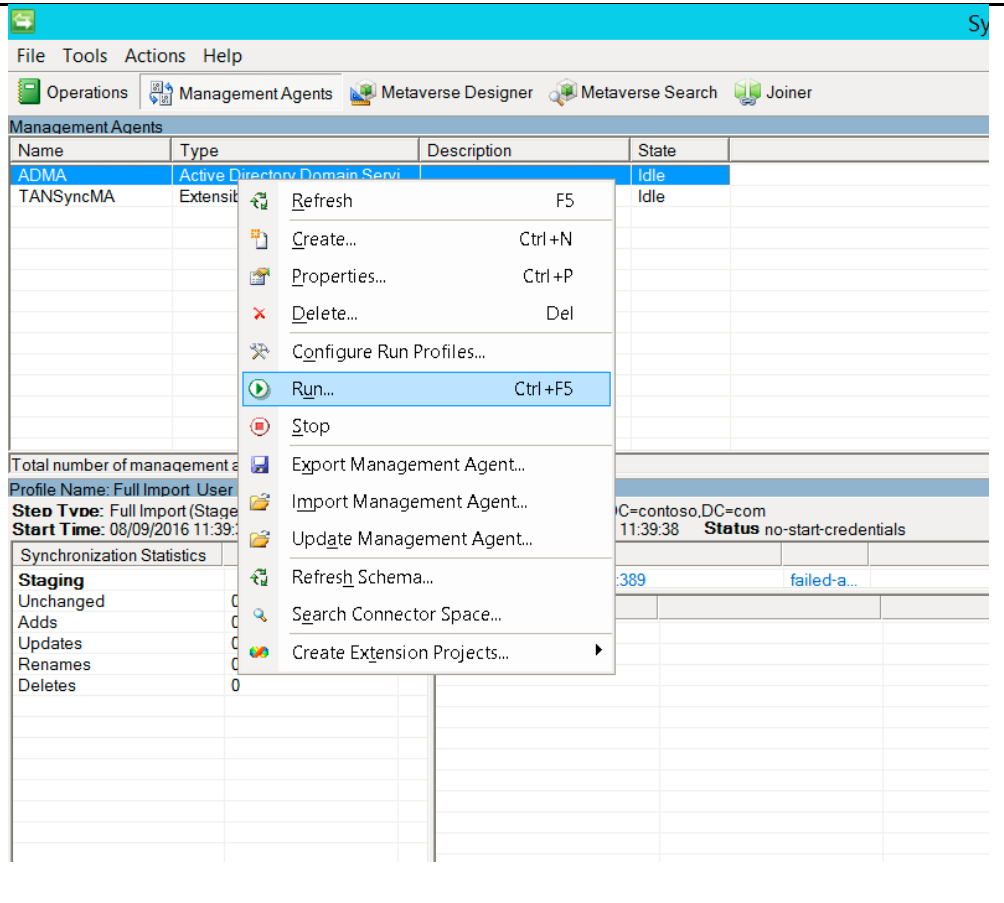
Step	Description
<p>In this example we are going to be filtering out all users that do not have a value of "NHSmal2 User" in their "employeeType" attribute.</p>	 <p>The screenshot shows a dialog box titled "Filter for user". At the top, it states: "If an object satisfies this filter, it becomes a filtered disconnector and is not processed any further by the remaining management agent rules." Below this is a "Build Filter" section with three columns: "Data source attribute:", "Operator:", and "Value:". The "Data source attribute:" column has a list of attributes with "employeeType" selected. The "Operator:" column has a list of operators with "Does not equal" selected. The "Value:" column contains the text "NHSmal2 User". Below the build filter section are two buttons: "Add Condition" and "Remove Condition". At the bottom of the dialog is a table with three columns: "Data Source Attribute", "Operator", and "Value". The table is currently empty.</p>
<p>Click "Add Condition" and this will create the filter in the table below.</p>	 <p>This screenshot is identical to the previous one, but the "Add Condition" button has been clicked. The table at the bottom of the dialog now contains one row with the following data: "employeeType" in the "Data Source Attribute" column, "Does not equal" in the "Operator" column, and "NHSmal2 User" in the "Value" column.</p>

This will create a new filter and add the condition you have just created to the filter.

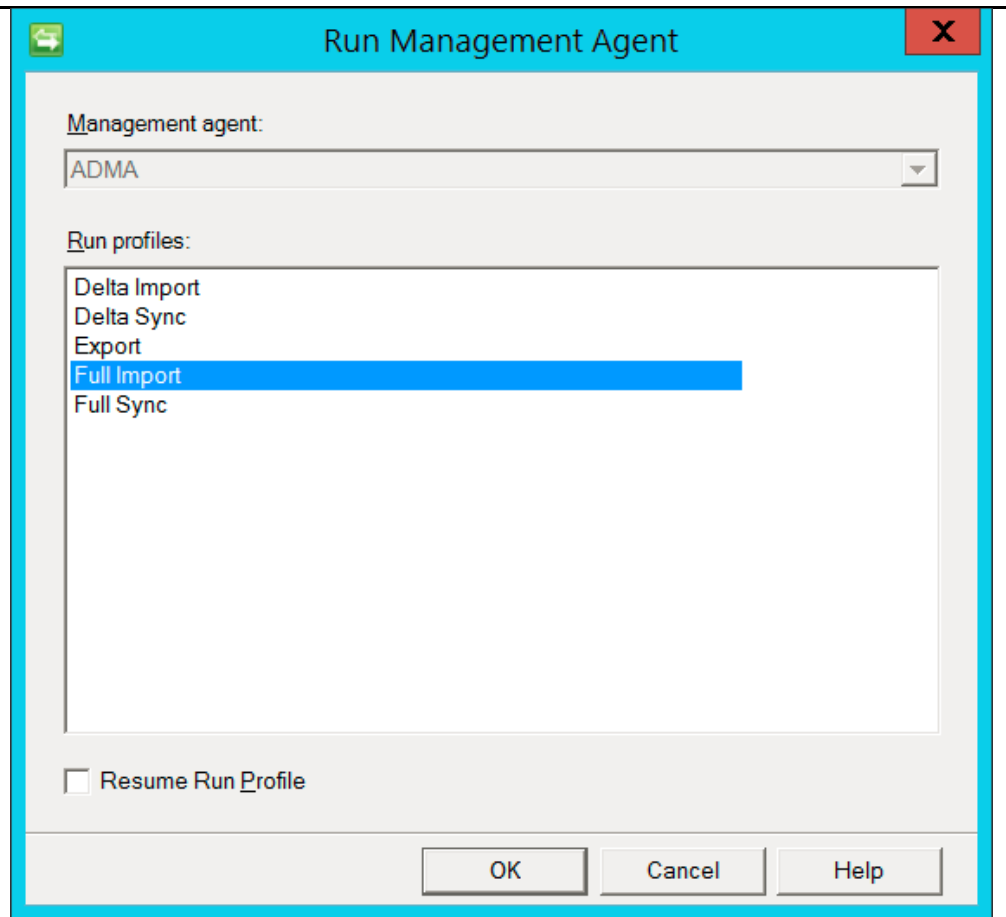
Click "OK" and your filter is now set up.



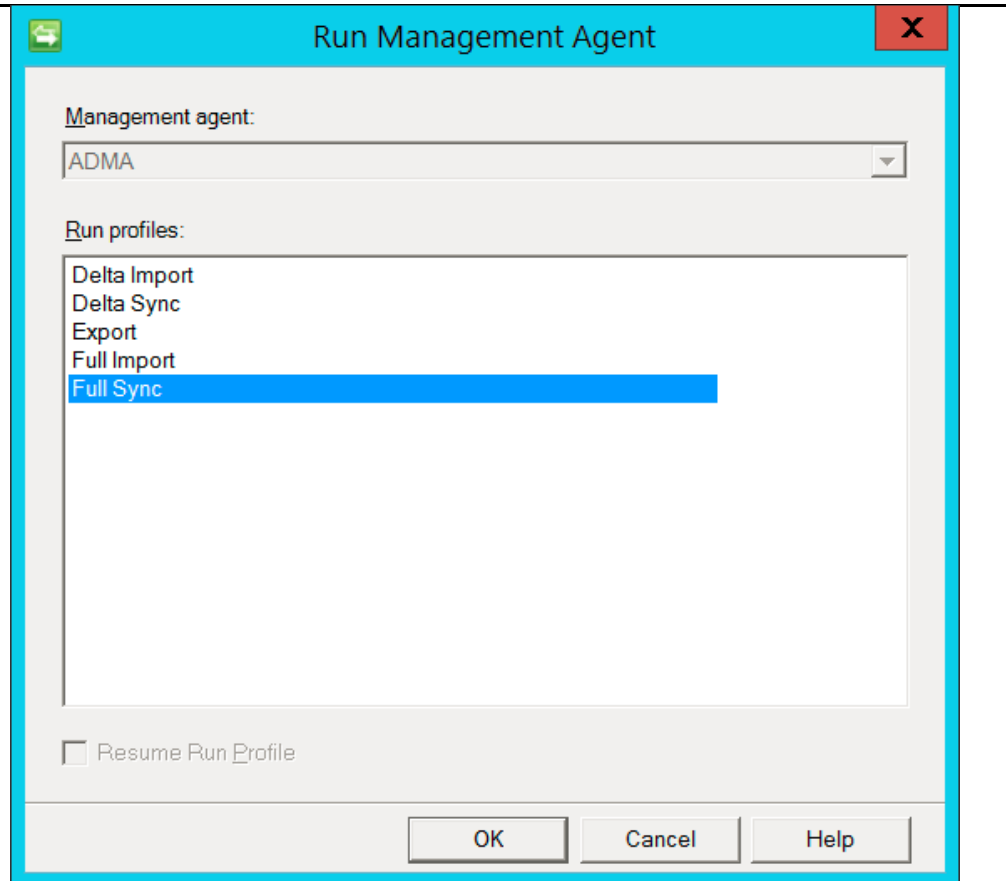
Right click "ADMA/SQLMA" and click "Run"



Click "Full Import" and then click "OK"



Once that is complete, right click "ADMA/SQLMA" and click "Run" and then click "Full Sync" and click "OK"

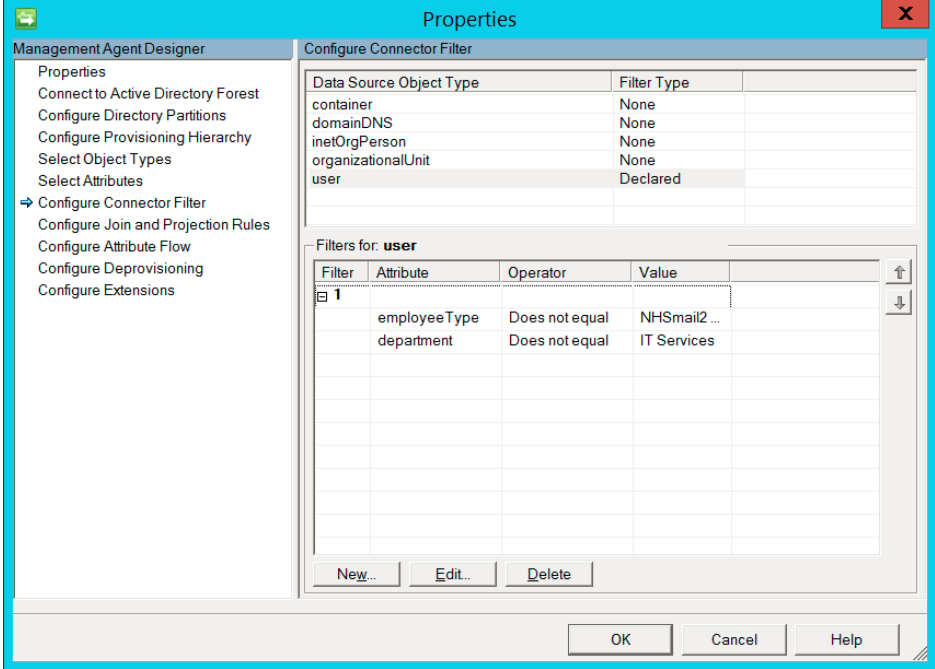


5 Configuring Advanced Connector Filters

ADMA/SQLMA filtering also allows for the creation of more advanced filters using multiple criteria to create logic gate for filtered disconnectors. Advanced filters can be set to have either an AND or an OR advanced filter.

5.1 AND filter

If you need to set a filter where more than two rule criteria **must** apply, you can set a filter that contains an 'AND' command. Below details how to set an advanced filter with an AND requirement:

Step	Description												
<p>The first is an AND filter where 2 or more values must be met in order to be a filtered disconnector</p>	 <p>The screenshot shows the 'Properties' dialog box for 'Configure Connector Filter' in Management Agent Designer. The left pane shows a tree view with 'Configure Connector Filter' selected. The right pane shows a table of 'Data Source Object Type' and 'Filter Type'. Below this is a section for 'Filters for: user' containing a table with two filter rules:</p> <table border="1" data-bbox="778 947 1348 1243"> <thead> <tr> <th>Filter</th> <th>Attribute</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>employeeType</td> <td>Does not equal</td> <td>NHSmal2...</td> </tr> <tr> <td></td> <td>department</td> <td>Does not equal</td> <td>IT Services</td> </tr> </tbody> </table> <p>Buttons for 'New...', 'Edit...', and 'Delete' are visible below the filter table. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.</p>	Filter	Attribute	Operator	Value	1	employeeType	Does not equal	NHSmal2...		department	Does not equal	IT Services
Filter	Attribute	Operator	Value										
1	employeeType	Does not equal	NHSmal2...										
	department	Does not equal	IT Services										

Edit your first filter and then select the data and click “Add Condition” and then click “OK”

Your new condition has been added to your filter and users must satisfy both Conditions to become a filtered disconnecter.

In this example, users who do not have “employeeType” or “department” equalling the set values, they will be a filtered disconnecter.

Filter for user
X

If an object satisfies this filter, it becomes a filtered disconnecter and is not processed any further by the remaining management agent rules.

Build Filter

Data source attribute:	Operator:	Value:
<div style="font-size: x-small; padding: 2px;"> <dn> cn company department description displayName employeeType facsimileTelephoneNumber givenName info initials postalAddress </div>	<div style="font-size: x-small; padding: 2px;"> Equals Does not equal Starts with Does not start with Ends with Does not end with Contains Does not contain Is present Is not present </div>	<input style="width: 90%; height: 20px;" type="text" value="IT Services"/>

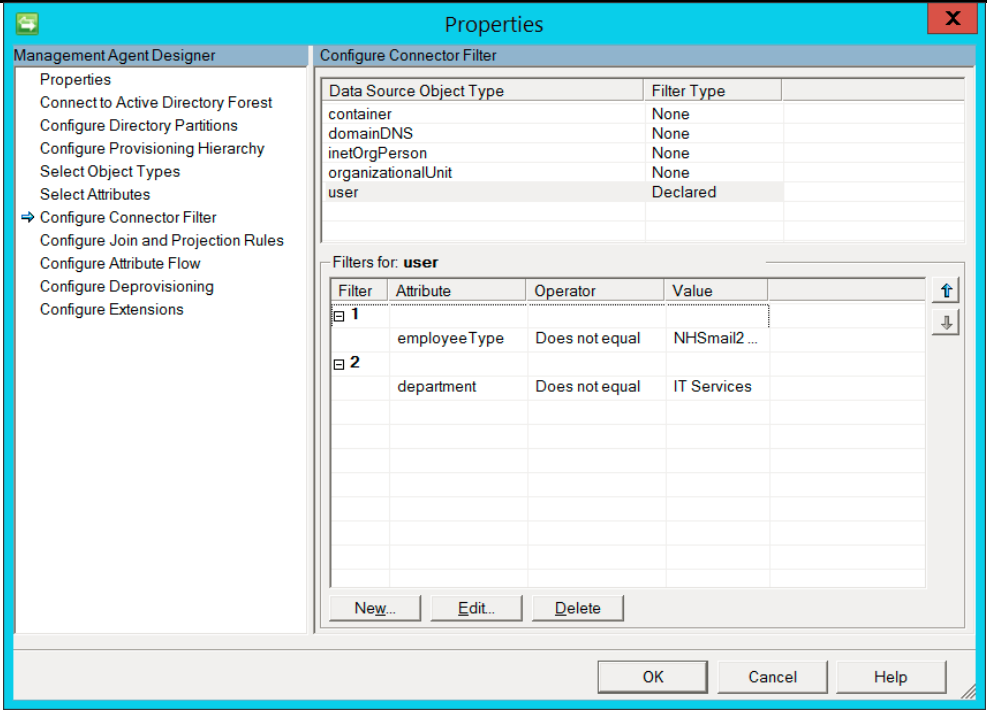
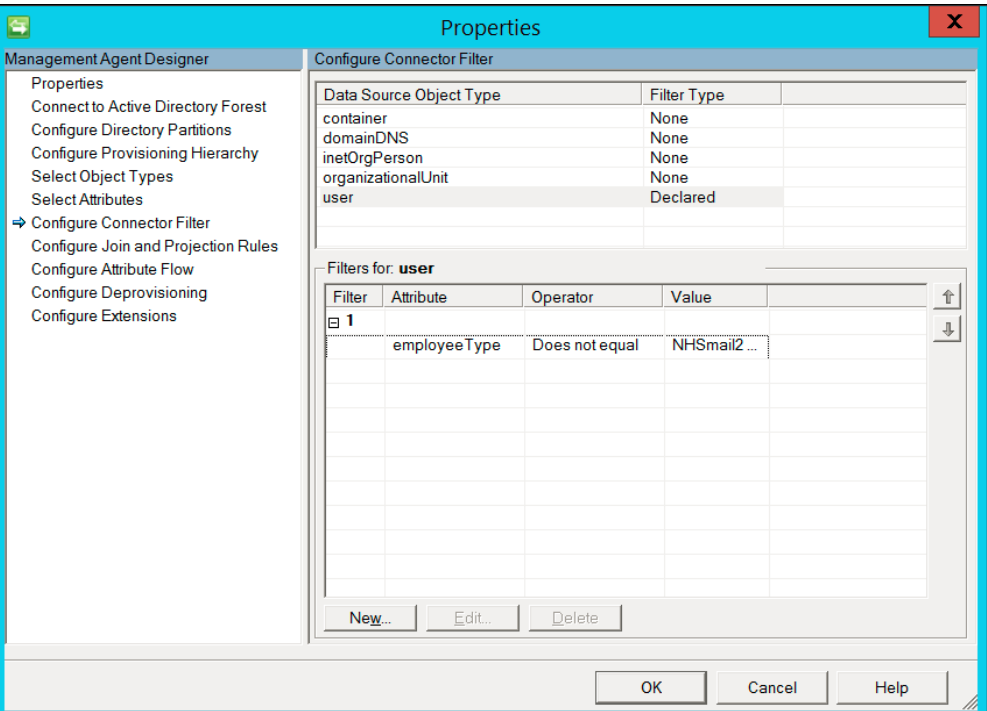
Add Condition
Remove Condition

Data Source Attribute	Operator	Value
employeeType	Does not equal	NHSmal2 User
department	Does not equal	IT Services

OK
Cancel
Help

5.2 OR filter

If you need to set a filter where at least one of multiple rule criteria must apply, you can set a filter that contains an 'OR' command. Below details how to set an advanced filter with an OR requirement:

Step	Description
<p>This filter is an OR filter, where either one of the filters needs to be satisfied for the user to become a filtered disconnecter.</p>	 <p>The screenshot shows the 'Configure Connector Filter' dialog box. On the left is a tree view with 'Configure Connector Filter' selected. The main area has a table for 'Data Source Object Type' and 'Filter Type'. Below that is a section for 'Filters for: user' containing a table with columns 'Filter', 'Attribute', 'Operator', and 'Value'. Two filters are listed: Filter 1 (employeeType, Does not equal, NHSmal2...) and Filter 2 (department, Does not equal, IT Services). Buttons for 'New...', 'Edit...', and 'Delete' are at the bottom of the filter list.</p>
<p>Click "New"</p>	 <p>This screenshot is identical to the previous one, but the 'Filters for: user' table now only contains the first filter (Filter 1: employeeType, Does not equal, NHSmal2...). The second filter (Filter 2) has been removed, illustrating the result of clicking the 'New' button.</p>

Add your new condition and click "OK"

Now users who are either in the "IT Services" department or have "NHSmail User" in the "employeeType" attribute will become a filtered disconnecter.

If an object satisfies this filter, it becomes a filtered disconnecter and is not processed any further by the remaining management agent rules.

Build Filter

Data source attribute: Operator: Value:

<dn> cn company department description displayName employeeType facsimileTelephoneNum givenName info initials

Equals Does not equal Starts with Does not start with Ends with Does not end with Contains Does not contain Is present Is not present

IT Services

Add Condition Remove Condition

Data Source Attribute	Operator	Value
department	Does not equal	IT Services

OK Cancel Help