## How to Import Client Portal Users From Active Directory

## **Objectives:**

- Enable SSO
- Import Client Portal Users From Active Directory

## Steps:

To enable seamless sign-in experiences for your client portal users using their Microsoft accounts, you can integrate LEXZUR with your Azure Active Directory.

The process begins with setting up and configuring your application in Microsoft Azure.

O Learn more on how to setup and configure your Azure Active Directory in this guide.

Subsequently, you need to activate Single Sign-On (SSO) within LEXZUR.

Navigate to the Single Sign-On configuration in the system settings

	User Groups Permissions	DocuSign integration	System Settings Billing and Plan
System Preferences		Email Templates	Manage Users
	User Management Reports		Add User
Setup & Configuration Notification Scheme	Users Audit Report	😲 Intellectual Property	Apps Marketplac
ook & Feel	Login History Report	Intellectual Property Rights	
tegrations	User Management Report	IP Classes	
ask & Triggers Automation		IP Subcategories	
vocument Content Search (Full Text Search)	P Internet Date	IP Statuses	
ustom integrations	b Import Data	IP Names	
	Companies	Petition/Opposition Types	
Anns	Persons	Email Templates	
,	Corporate Matters		
pps & Configurations	Intellectual Properties		
	Litigation Cases	Manage Boards	
	Matter Containers	Matter Boards	
Single Sign On	Contracts & Documents	Task Boards	
	External Advisors	Litigation Dashboard 1 - Managem	ent
etup		Litigation Dashboard 2 - Managem	ent
	🔅 Advisor Portal		
	- 4 <sup>2</sup>	T Attachments	

Here you'll input the Client ID and Client Secret, add metadata files if necessary, and decide whether to synchronize user groups.

Settings / Single Sign On Configuration		
	Configuration	
	Client ID*	123
Azure Active Directory		
	Client secret*	123
	Metadata File	Choose File No file chosen
	User Group Syncronization	No 🗸
Others		
	Save	

Now, to import client portal users from Azure AD, navigate to "Manage Client" under the Client Portal settings:

📩 Client Portal
Manage Clients
Configure Roles
Sync clients with 'Azure Active Directory'
Clients by Companies
Request Type Categories
Request Types
Permissions
Contract/Document Request Type Categories
Contracts/Documents Request Types
Contracts/Documents Permissions
Delegations

## From "Actions," click on "Import clients from Azure AD."

Settings / Clien	nt Porta	I - Manage Clients	Add Client							
				The nu	mber of licenses purchased for	"Collaborators" is (10) and the nu	umber of licenses used is (10)			
URL for Client	URL for Clients: https://site.app4legal.com/7691/modules/customer-portal/ Copy URL									
Clients	5 0.51	Search	Directory intep	Q		rai, asers rogin_iops/azare.				Advanced Search Actions -
	~	First Name	Last Name 🗸	Username v	r Email 🗸	Туре	Status	User Directory	Company	Add Client Import Clients from "Azure AD"
(	0	Tima	Andrew	Tima	TimaA@gmaill.com	Collaborator	inactive	Local Directory		Export to Excel
(		Com								
		SdIII	Abed	sa	soheir.zarzour@gmail.com	Both	inactive	Local Directory		
(	0	Jana	Abed Jana	sa Hamshou	soheir.zarzour@gmail.com jana.hamshou@app4legal.com	Both Collaborator	inactive	Local Directory		1
	•	Jana	Abed Jana Malbeck	sa Hamshou SaraM	soheir.zarzour@gmail.com jana.hamshou@app4legal.com saramalbeck1@gmail.com	Both Collaborator Both	inactive active	Local Directory Local Directory Local Directory	Global Tech	
	•	Jana Sara Alvah	Abed Jana Malbeck Scott	sa Hamshou SaraM Alvah Scott	soheir.zarzour@gmail.com jana.hamshou@app4legal.com saramalbeck1@gmail.com AlvahScott@outlook.com	Both Collaborator Both Client	inactive inactive active inactive	Local Directory Local Directory Local Directory Local Directory Local Directory	Global Tech	
	•	Jana Sara Alvah jim	Abed Jana Malbeck Scott batz	sa Hamshou SaraM Alvah Scott jimbatz@gmail.com	sohelr.zarzour@gmail.com jana.hamshou@app4legal.com saramalbeck1@gmail.com AlvahScott@outlook.com jimbatz@gmail.com	Both Collaborator Both Client Both	inactive active inactive active	Local Directory Local Directory Local Directory Local Directory Local Directory Local Directory	Global Tech	
		Jana Sara Alvah jim Adam	Abed Jana Malbeck Scott batz Christopher	sa Hamshou SaraM Alvah Scott jimbatz@gmail.com Adam	soheir.zarzour@gmail.com jana.hamshcu@app4legal.com saramalbeck1@gmail.com AlvahScott@outlook.com jimbatz@gmail.com ademchristopherr@gmail.com	Both Collaborator Both Client Both Both	inactive inactive active active active	Local Directory Local Directory Local Directory Local Directory Local Directory Local Directory	Global Tech	IT Expert

Enter the user details, including the username and access type (client, collaborator, or both).

Settings /	Client Portal -	Manage Clients	/ Import Users
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Import Clients from Azure Ac	ctive Directory
Users to import *	
	Start typing to select from possible matches.
Access type*	Client
Company	Start typing Q
Person / Company Category	Client
	Save

For importing a group of users, head to Settings, choose "Sync clients with Azure Active Directory" under the client portal section

📩 Client Portal	
Manage Clients	
Configure Roles	
Sync clients with 'Azure Active Directory'	
Clients by Companies	
Request Type Categories	
Request Types	
Permissions	
Contract/Document Request Type Categories	
Contracts/Documents Request Types	
Contracts/Documents Permissions	
Delegations	

Select the AD group and Company, and initiate the synchronization process.

Settings / Sync clients with 'Azure Active Directory'			
Sync clients with 'Azure Active Directory'			
Azure Active Directory group *	····· <	۹. ۲	To enable automatic sync on a daily basis Reach out to the support, click here.
Company	Start typing	٩,	
		×	
	Stop Syncing		

Clients will be then able to access the client portal via the link shared by administrators.

Client Portal by LEXZUR Welcome to LEXZUR Client Portal		
🖾 User Login		4
Password	0	
Keep me signed in		5
Sign In		
Or		1
Sign in using Azure Sign in using OneLogin		
Don't have an account? Sign Up		TT

The URL for clients using Azure Active Directory is accessible from the top of the manage client portal users page.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!

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