



Onboarding FAQs - Stage 2: Basic Training

Introduction

Welcome to the *Basic Training & Build* section of the Claromentis onboarding FAQs. This section is designed specifically for customers who are currently going through onboarding or about to begin the process.

Here, you'll find answers to common questions about training, learning the platform, and building out the foundations of your site as part of the guided build experience.

You'll also note that these questions are separated into 5 sections for each stage of Claromentis onboarding:

1. [Kick Off & Install](#)
2. [Basic Training & Build](#)
3. [Content Creation](#)
4. [Pre-Launch](#)
5. [Go Live](#)

2. Basic Training

We want to use a full active directory sync - if we create local accounts for now, will that be fine?

- Yes that is fine, but we need to ensure that local account usernames match what it is in the active directory.
- It is better in this case to run the sync asap.
- Usernames for LDAP accounts will be handled by the sync when it runs and whatever is set in AD is what the Intranet will create - either a new user profile if the username is unique or update an existing user if the username is already in use.

For the site build, what would be the best way to proceed with adding in Users? If we are syncing with our active directory, would it be useful to have the users integrated into the system before we build out the site, as some features depend on having a larger database of people?

- If an LDAP sync is going to be used our recommendation is to not add any local end users to begin with, as the sync, once set up, will handle their account creation in totality.
- Instead, local accounts can be created for your administrators by the onboarding team so they can build out the site.
- If you must use any local users ahead of a sync, the requirement here is that the usernames you are using to set them up MUST match what is in your Active Directory.
- This means once the sync is set up and runs for the first time their accounts can be automatically changed from local to LDAP.
- We recommend your team set up the LDAP connection as soon as possible following our guides, [1](#) & [2](#).
- Once the connection has been set up you can either enable this to bring in all the end user profiles straight away (but not advertise the Intranet URL so users can't try to login) or this can remain disabled until a few days before launch at which point it can be turned on, a sync run and the user profiles created.
- The username and password for LDAP accounts is stored in the client's Active Directory and not Claromentis, so their team can make users aware of their login details outside of the Intranet if they do not already know these.
- For intranets not using any sort of Active Directory, we would recommend uploading all your users via CSV file, which will enable you to build out your site with a large group of users, and you can set up permissions via roles/groups that way.

Can you elaborate more about syncing Groups with the Active Directory?

- You have the option to sync your pre-existing Groups and permissions (within your active directory) with Claromentis. The other option is to create Groups locally/manually.
- If you want to set up the connection but the AD structure is being edited to be ready to sync, you can disable group sync and still bring in the users when the sync runs - updating the group sync feature at a later date.
- If you are unsure about Group sync, but want to start setting up permissions we would advise syncing the user accounts with group sync disabled and create People Roles to add users to instead and place these in permission boxes. They are not tied to the sync in any way so can be used independently to give/restrict access before they decide what's happening with groups.

Do I have to sync Groups with the active directory/LDAP? What if we want to make our own Groups?

- That is absolutely fine. You can disable this easily when you are establishing the LDAP connection in Admin > System > LDAP > Section 4
- Select 'disabled' and save the connection.
- If the group sync is disabled groups are manually created, managed and user membership of them controlled by People Administrators in the Intranet.

We want to connect to the active directory, but will this mean that all end-users will be sent their password as soon as we sync? What if we want to hold off on this?

- LDAP user creation (profile sync) does not send a notification to any users.
- End users will only be given an opportunity to log in if they know of the Intranet, can open its address and attempt to login with their AD credentials (if known to them) So, to control this the client can be advised not to share the URL with any end users until launch.
- The username and password for LDAP accounts is stored in Active Directory and not Claromentis, so you can make users aware of their login details outside of the Intranet if they do not already know these.
- As a reminder, you can set up the LDAP connection and either choose to start the sync and bring in all user profiles (and groups too if syncing these) or they can set the connection up and leave this disabled (so it doesn't run and create any profiles)
- Then when they are ready to sync the profiles before launch they can enable the connection, run the sync and create the profiles.
- For local account creation, or bulk user import, you will have the choice to send a credential email when the users are created, or not.

How much time should we put aside to do the training, and then the build? Is there an expected timeframe?

- We'd probably recommend spending about 4-6 hours on the build. Obviously this will be dependent on what you have on during your day to day.
- Should we need to push back the next call due to how you are getting on, that is completely fine.
- Furthermore, if you're stuck with anything, and it is too complicated to explain via the Dashboard, then please do let us know and we can add it to the agenda of the next Onboarding Call.
- On the training, it depends on what we've put on your curriculum! The recommended time spent is within the E-Learning application courses at the start, which should help you plan accordingly!

If we needed a live session for assistance with some of the minimum set up, is that chargeable?

- 5 Onboarding calls is sufficient to create a viable site ready for launch - particularly because there is dedicated time for a live Q&A and demos within each call.
- We also welcome continuous questions regarding Content Creation via Discover Projects correspondence, and many of the answers to your questions will also be found within the Claromentis University Courses and Knowledgebase articles.
- That said, we understand that there are some instances where this may not be possible within the dedicated Onboarding Calls or via self-learning, and a few of our customers do require a bit of extra support during the Content Creation Phase, where you may need additional calls/training/live demos to fine-tune the system and ensure it's ready for launch.
- As such, in this instance, we would be happy to schedule some additional calls in to run through specific set up queries.
- As a first step, we would direct you to the Project dashboard, and if we cannot answer there, we will liaise with you to schedule something in.

[Click here to access 3. Content Creation FAQs](#)