

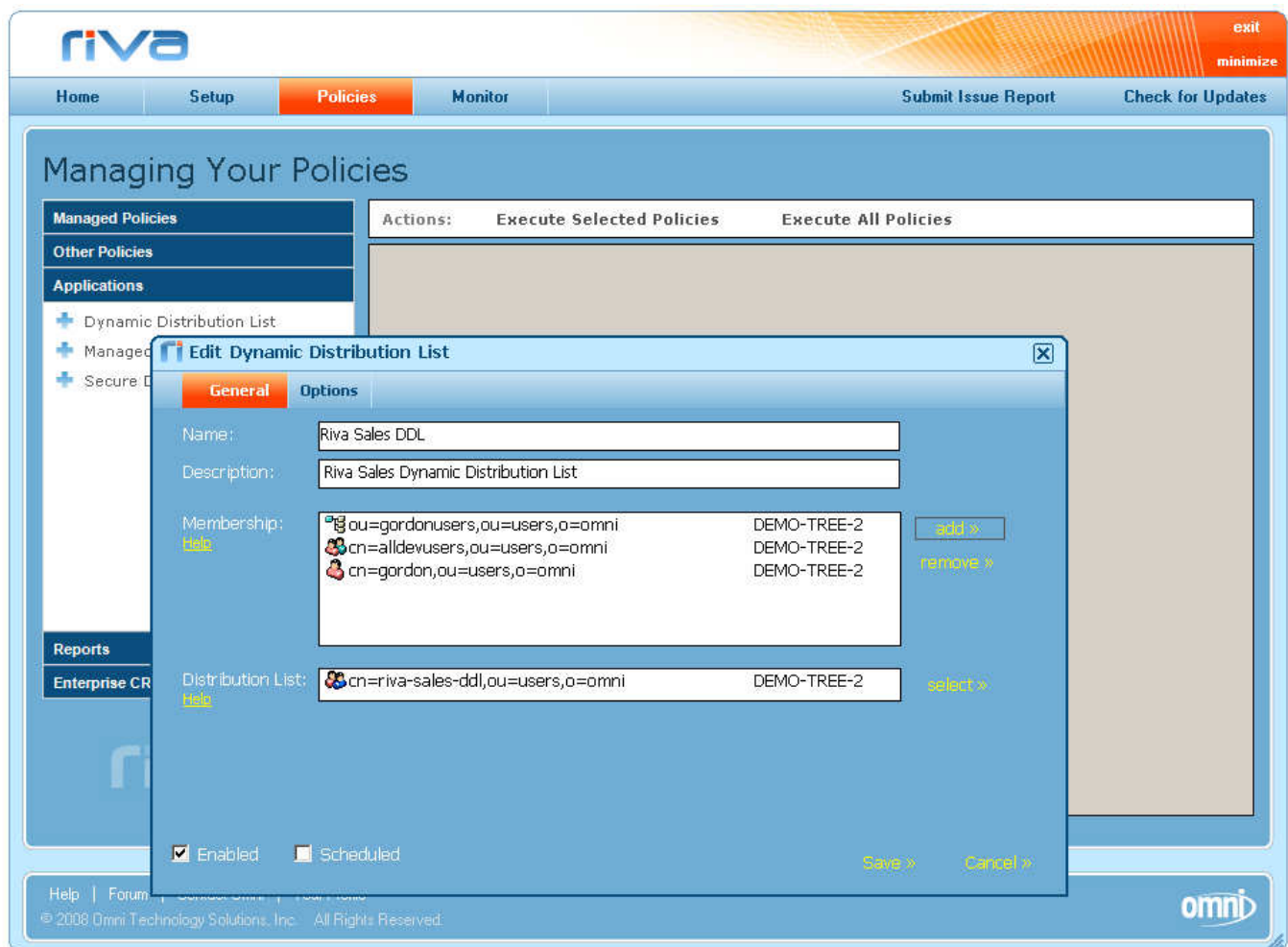


Riva Enterprise Edition Dynamic Distribution List Guide

This Guide

Welcome to Riva Managed Applications - Dynamic Distribution Lists, a policy-driven method of creating dynamically populated GroupWise distribution lists.

This guide provides information to show how to create and manage Riva Dynamic Distribution List policies.



Riva “Dynamic Distribution List” application makes use of the Riva platform which must be installed and configured. Please refer to the following **Riva** documents for installation, configuration and licensing instructions:

- **Riva Setup and Configuration Guide** - for instructions to install the Riva platform application and to run the Connection wizards to create the necessary system connectors.
- **Riva Licensing Guide** - for information on how to request trial or full licences for Riva, and instructions on how to install the license files.

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Use Dynamic Distribution List Policies

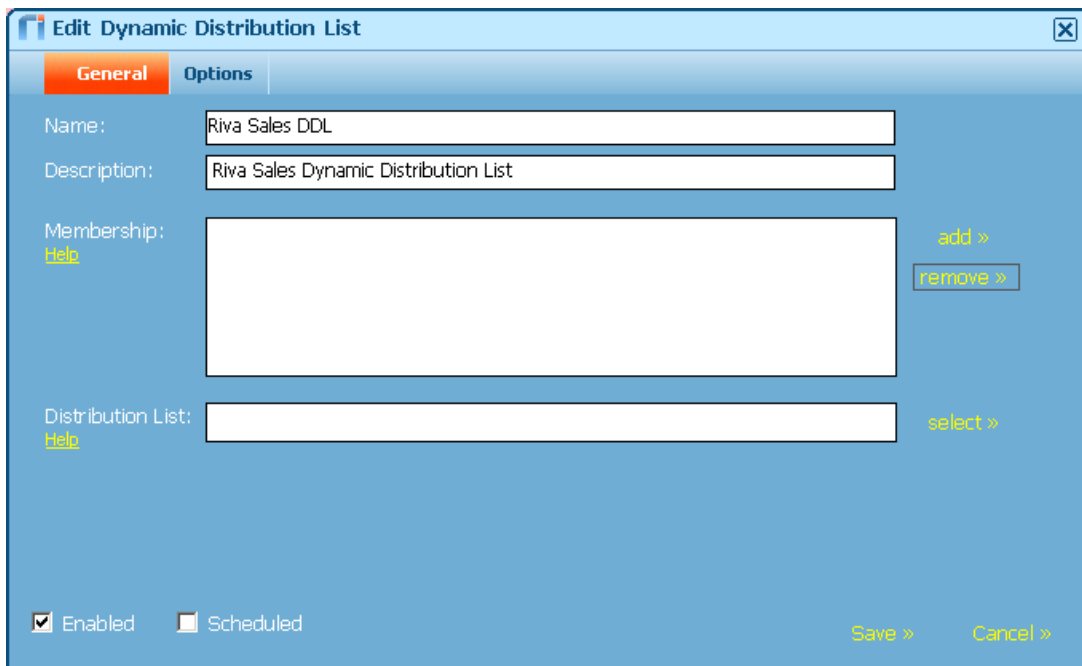
How Dynamic Distribution List Policies Work

The **Dynamic GW Distribution Lists** policy wizard allows administrators to configure dynamic distribution lists. For each dynamic distribution list, an administrator can configure one or multiple eDirectory groups or eDirectory containers and use advanced LDAP filter values to dynamically update the distribution list. When a Dynamic Distribution List policy is executed, it polls the source eDirectory groups (nested groups) or containers and/or runs the LDAP query filter and replaces the previous members of the distribution list with the new membership information.

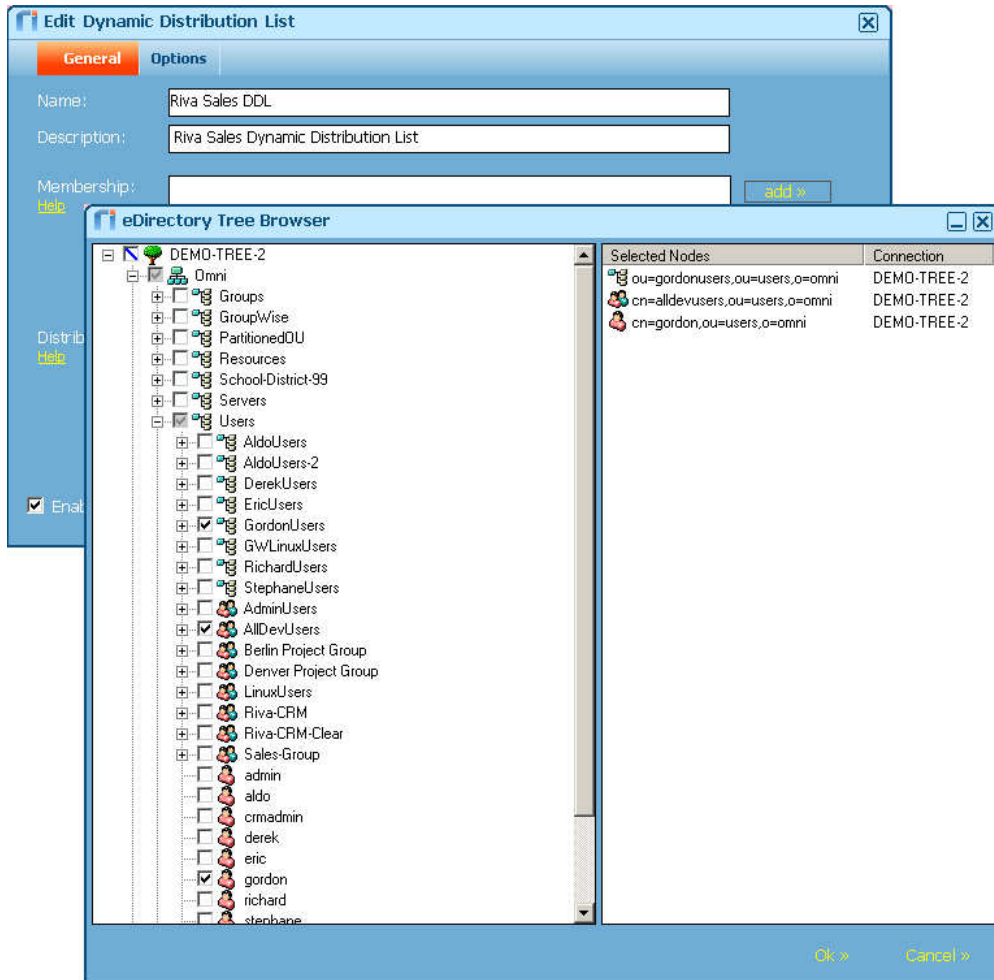
Creating Dynamic Distribution List Policies

To create a Dynamic Distribution List policy:

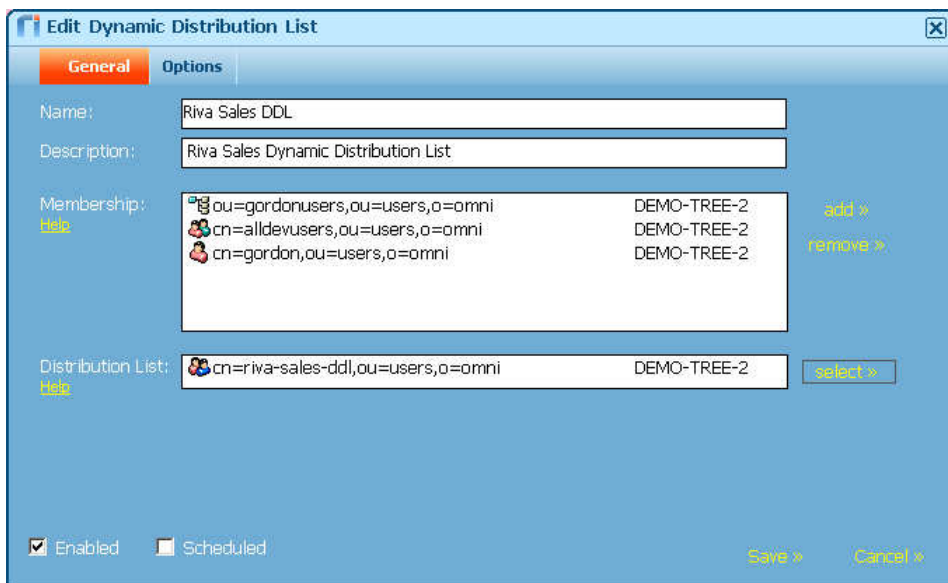
1. In the **Policies** page under **Applications**, click the **Dynamic Distribution Lists** link.
2. Provide a short name and description for the policy.



3. For **Membership**:: click the **add >>** link, browse and select the eDirectory users, groups or container objects. This will constitute the membership for the Dynamic Distribution List. Click **Ok >>**.

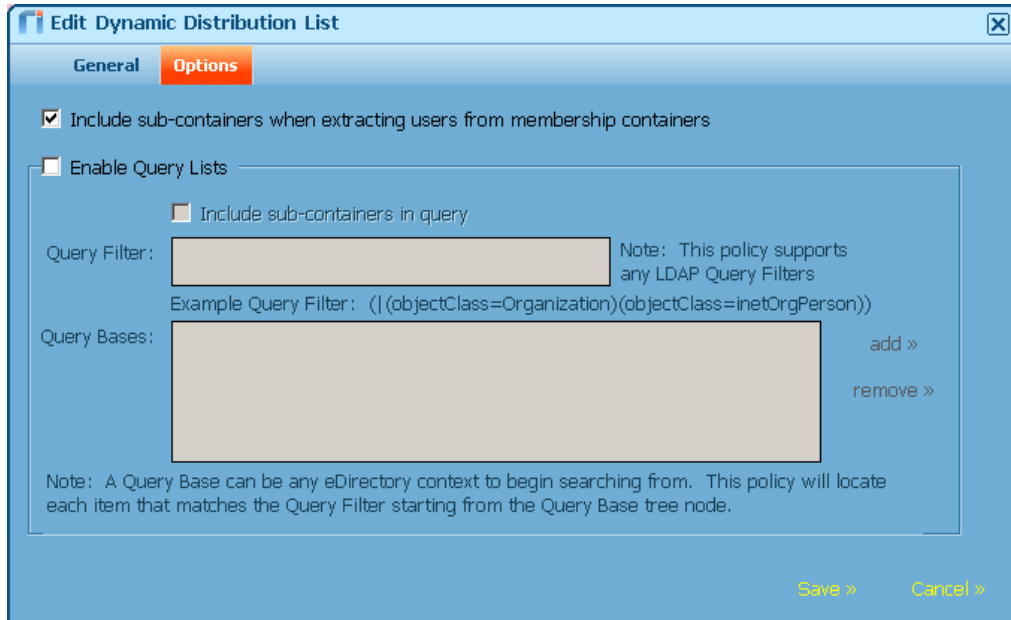


4. For **Distribution List**: click **select >>** and select the desired GroupWise Distribution List object. Click **OK>>**.



Note - Dynamic Distribution List policies assume they are the sole management point for the specified GroupWise distribution list. When a Dynamic Distribution List policy is executed, it will delete all existing users from the distribution list's membership and then add the users from the source group and query filter identified in the policy.

- If containers are used in the "Membership:" list and you want the policy to include users from child containers, select **Options** and check **Include sub-containers when extracting users from membership containers**.

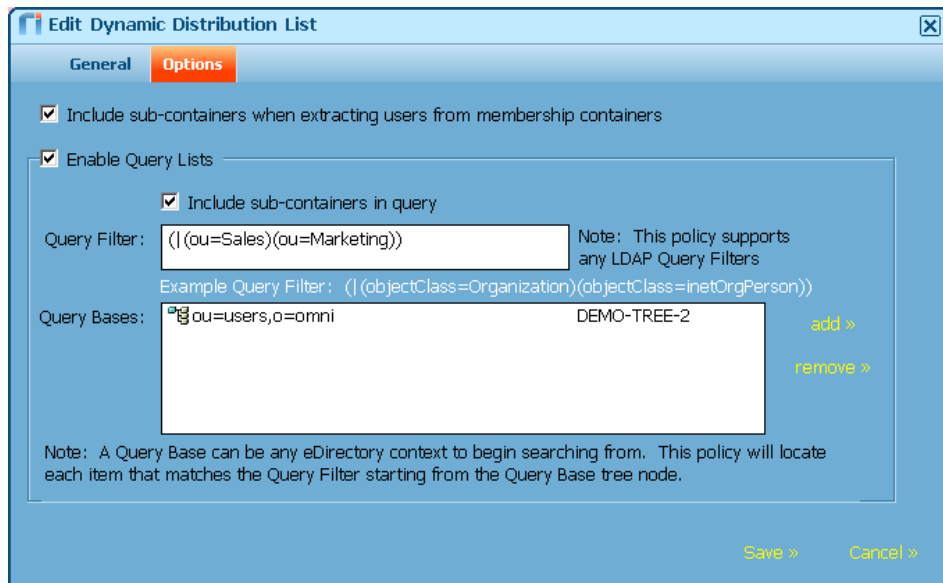


This option does not apply to LDAP query filters. This option will affect all container objects used in the "Membership:" list.

- Verify that **Enabled** is checked to enable the policy. Only enabled policies can be executed.
- Click **Save>>** to save the policy.

Use Query Lists

In addition to allowing an eDirectory group be the source of the members of a GroupWise dynamic distribution list, the "Query Lists" option allows you to create dynamic distribution lists based on multiple eDirectory attribute values. Riva DDL uses LDAP queries to extract this information from eDirectory. This requires that you understand how to build LDAP queries. Refer to www.faqs.org/rfcs/rfc2254.html for additional information. Softerra provides a free "LDAP Browser" utility at www.softerra.com/download.htm that can be used to determine the class and attribute names being used in eDirectory.



A “Query Base” is considered the “root” container object from which the LDAP query will be performed. All sub-containers are automatically searched when you perform a Query List. You can add multiple Query Bases.

To create a Query List:

1. Select **Options** and check **Enable Query Lists**.
2. Build a suitable LDAP **Query Filter**. For our example above:

((ou=Sales)(ou=Accounting))

“ | ” is the logical **OR** operator

“ **ou** ” is the LDAP attribute for “**Department**”

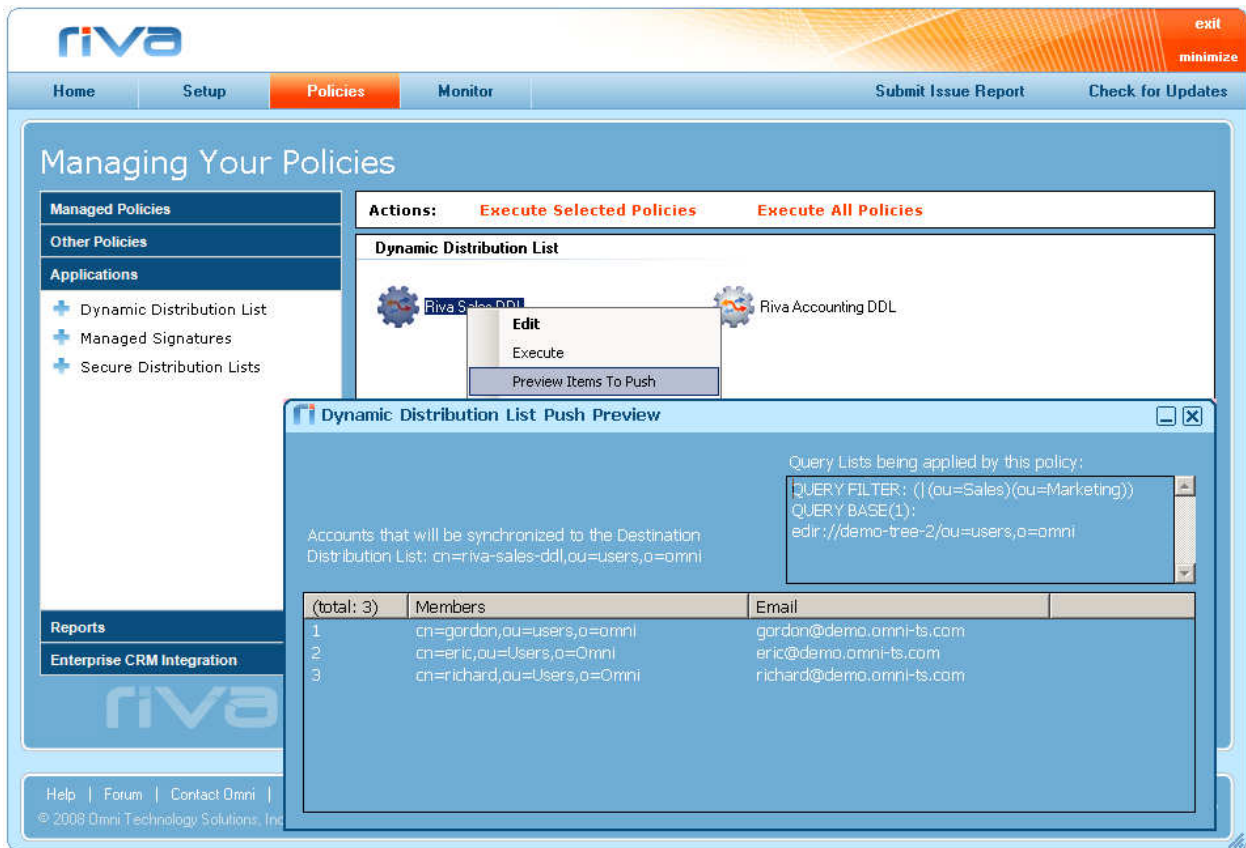
Note - The query from our example will add users which match the filter (users in “Sales” OR “Marketing” Departments) starting at the “Query Base” (ou=users,o=omni) to the users already identified in the “Membership” list specified on the “General” page. It is possible to leave the “Membership” list on the General page blank in which case the policy affects only those users that match the “Query Filter”.

3. Add one or more **Query Bases**: which are the eDirectory container objects to start from.
4. Check “**Include sub-containers in query**” if the LDAP queries is to include user objects in child containers below the “Query Base” container objects.
5. Click **Save>>** to save changes to the policy.

Please contact us if you have questions about how to create complex LDAP Query List filters..

Confirming a GroupWise Dynamic Distribution List Policy

After saving a Dynamic Distribution List policy, the quickest way to confirm it is properly configured is to right-click the policy and select “**Preview Items to Push**”. This will cause Riva to poll the eDirectory tree, extract the group and container information and run the LDAP query to provide you with the list of accounts that will be pushed to the GroupWise distribution list.



How to Execute and Schedule Riva Policies

There are two global settings which affect policy execution:



- **Enabled** - this setting controls execution from within the Riva GUI.
- **Scheduled** - this setting control execution when Riva.exe is run from the command line or using Windows Task Scheduler.

Enabled and **Scheduled** are mutually exclusive. If both are selected, then the policy can be executed from within the Riva GUI and it can be run from the command line or by using Windows Task Scheduler.

There are four ways to execute Riva policies:

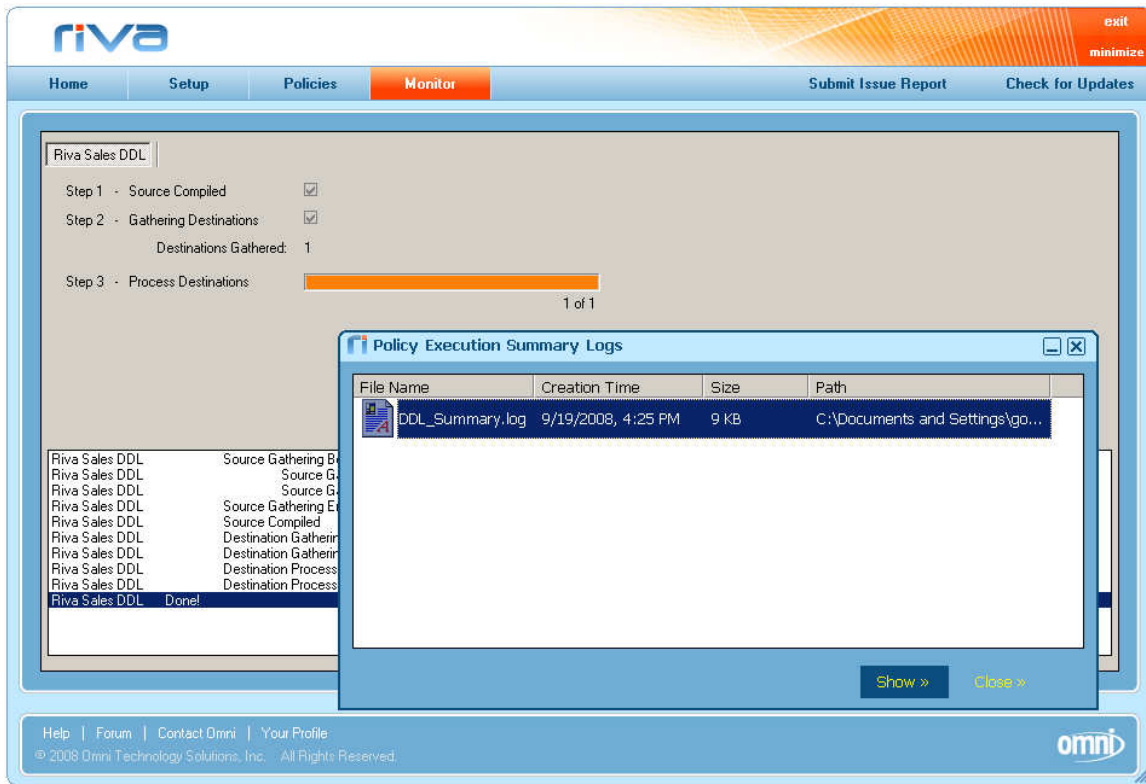
- **Execute All Policies** - click the “Execute All Policies” link in the **Actions:** tool bar. This will execute all enabled Riva policies.



- **Execute Selected Policies** - use Ctrl+click to select one or more policies and click “Execute Selected Policies” in the **Actions:** tool bar. This will execute only those selected policies that are enabled.

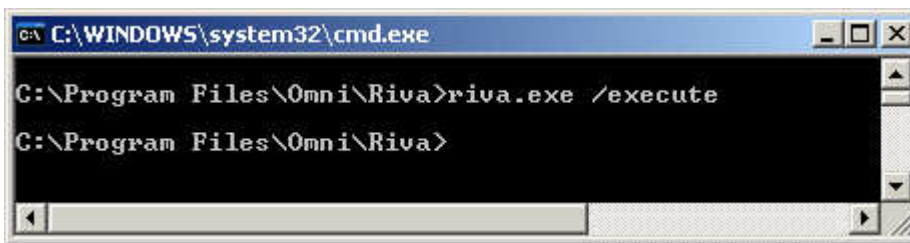


Note - When policies are executed from Riva interface, the **Monitor** tool will automatically open and display the policy execution in real-time.



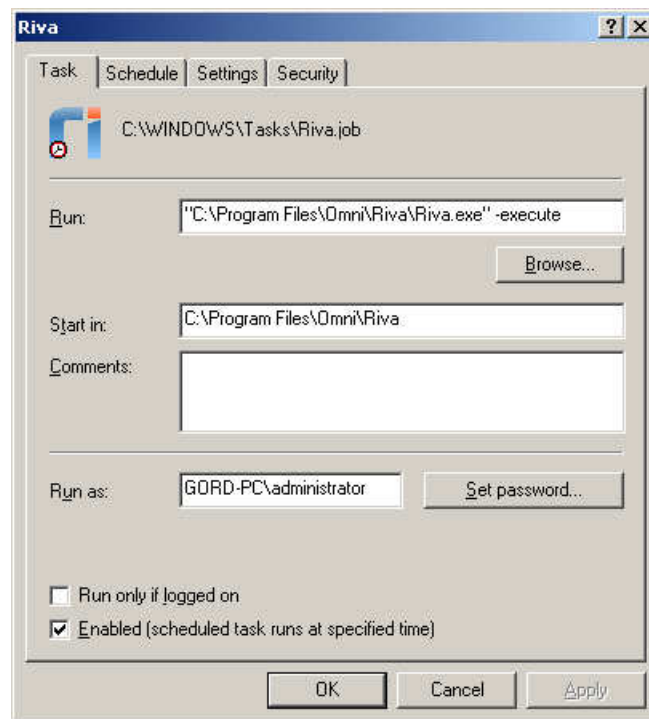
When the policy execution completes, a window will open that displays the list of summary logs for policies executed. Any of those log files can be opened using the **Show >>** button. Summary execution log files for Dynamic Distribution List policies are saved in the **\ExecutionSummaries\Dynamic Distribution List** folder of your Riva installation.

- **Command Line Execution** - You can run Riva from the command line for single execution or for scheduled updates: `c:\<path to file>\riva.exe /execute` will cause all scheduled policies to be executed.



- **Schedule a Policy** - You can schedule one or more Riva Policies using Windows Task Scheduler. To schedule Riva:
 1. Run the "Add Scheduled Task" wizard (Start > Programs > Accessories > System Tools > Scheduled Tasks). Click **Next >** and click **Browse . . .** to navigate to and select the RivaApp.exe file. Specify the frequency to run this task and click **Next >**. Complete the wizard.
 2. Open the task and modify the **Run:** value
C:\Program Files\Omni\Riva\Riva.exe to read
"C:\Program Files\Omni\Riva\Riva.exe" -execute

Place double-quotation marks around the path to the Riva.exe file and add -execute to the end of the line.



Click **OK** or **Apply** to save the changes to the task.

Best Practices for Dynamic Distribution List Policies

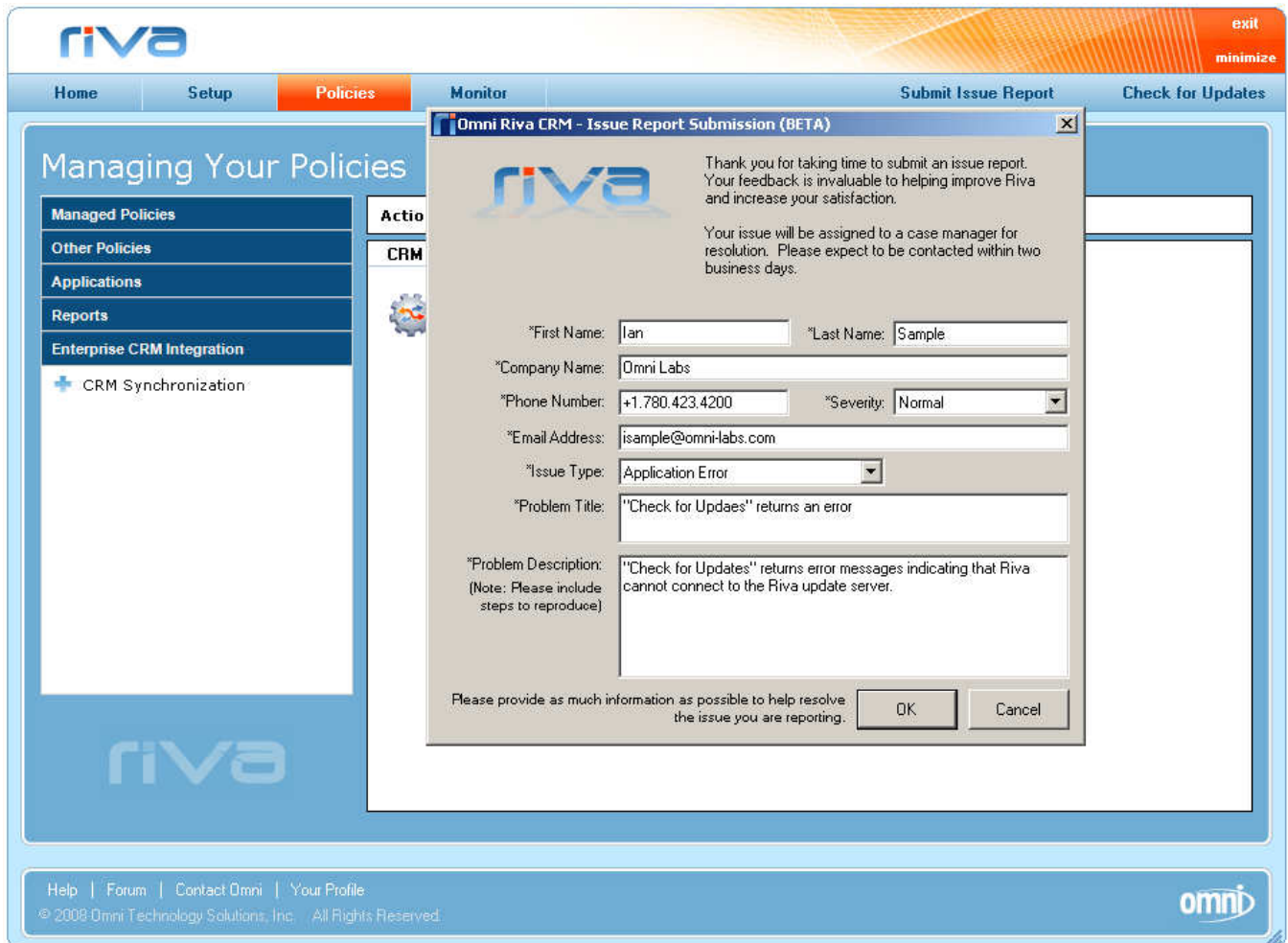
Here are recommended best practices:

- Before implementing Dynamic Distribution List policies, create an accurate list of existing distribution list memberships so those users can be added to the source eDirectory groups.
- Test, test, and test. When creating a new policy, use a sample group as the source and a “test” distribution list as the destination to ensure that the membership lists are working as desired. Once the policy is confirmed, the destination objects can be changed to identify the desired set of users.
- Create the source eDirectory Groups in the same container as the distribution lists to ease management. Ensure that you create only one source group for each distribution list.
- To change the membership in the distribution list, add / remove users in the source group and rerun the Dynamic Distribution List policy for that distribution list.
- If eDirectory templates are used to create user accounts, add Dynamic Distribution List linked groups to the appropriate eDirectory templates. This ensures that new users will be automatically assigned to dynamic distribution lists the next time the Dynamic Distribution List policy is run.
- If eDirectory templates are used to create user accounts, and if LDAP Query Filters are being used in these policies, ensure that the attribute being queried (e.g. “Department”) is being populated by the eDirectory template.

Support for Riva

Reporting a Technical Issue

Riva CRM Enterprise Edition includes a “Submit Issue Report” feature in the program. If you experience a problem with the application, click the **Submit Issue Report** link and complete the form. Please ensure that you include the correct contact information. Once the **OK** button is clicked, Riva CRM Enterprise Edition will send this issue and a copy of the application logs to our technical support team.



The screenshot displays the Riva CRM interface with a modal dialog box for submitting an issue report. The dialog box is titled "Omni Riva CRM - Issue Report Submission (BETA)". It contains the following fields and text:

- Thank you for taking time to submit an issue report. Your feedback is invaluable to helping improve Riva and increase your satisfaction.
- Your issue will be assigned to a case manager for resolution. Please expect to be contacted within two business days.
- *First Name: *Last Name:
- *Company Name:
- *Phone Number: *Severity:
- *Email Address:
- *Issue Type:
- *Problem Title:
- *Problem Description:
(Note: Please include steps to reproduce)
- Please provide as much information as possible to help resolve the issue you are reporting.

The background interface shows the Riva CRM application with a navigation menu (Home, Setup, Policies, Monitor, Submit Issue Report, Check for Updates) and a sidebar with options like Managed Policies, Other Policies, Applications, Reports, and Enterprise CRM Integration.

Upgrade and Maintenance Support Agreements

Customers who have current upgrade and maintenance support contracts are eligible to receive full email and telephone support Monday to Friday between 9:00 a.m. and 5:00 p.m. Mountain Time. Limited email support may be available during extended hours. Email and telephone support is also available to customers who are evaluating Riva. 365x7x24 support is available for optional purchase.

Free Support

Free support is limited to information available from our support forum, our web site and information contained in the user manual. Telephone and email support for customers who do not have a current support contract can be provided on a fee per incident or fee per hour basis, whichever is greater.

Contacting Support

You can contact support using the following methods. Please include as many details as possible when requesting support:

Use the “Contact Us” link in the top right corner of any page of our website and complete the online form or go to www.omni-ts.com/contact-us.html.

:: contact form

Topic:

Subject:

Product:

Your Name:

Your Email:

Contact Number:

Message:

Call or fax us:

Phone: **1-780-423-4200**
Fax: 1-780-423-4711

Online Resources

Online resources for Riva include:

- **Product Documentation:** Go to www.omni-ts.com select **Support**, follow the link for **Documentation** and select **Messaging Documentation**
- **Riva Flash Tutorials:** will be added to www.omni-ts.com/quicktours
- **Support Forum:** Go to www.omni-ts.com/Forum and:
 - Select the **Riva for GroupWise ~ Installing, Using, Support** forum
 - “**Riva Tips**” available at www.omni-ts.com/forum/post--2055--page-1.html is a collection of forum articles to provide troubleshooting and advanced management steps
- **Product FAQ:** Go to www.omni-ts.com/integration and select **Frequently Asked Questions**