Digi Signature Sync

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Overview

Digi Signature Sync uses the Google Gmail API to sync email signatures with dynamic information to all the users in a specific google domain. To do this it requires some preparation in your Google domain to allow secure access between the application and the google domain.

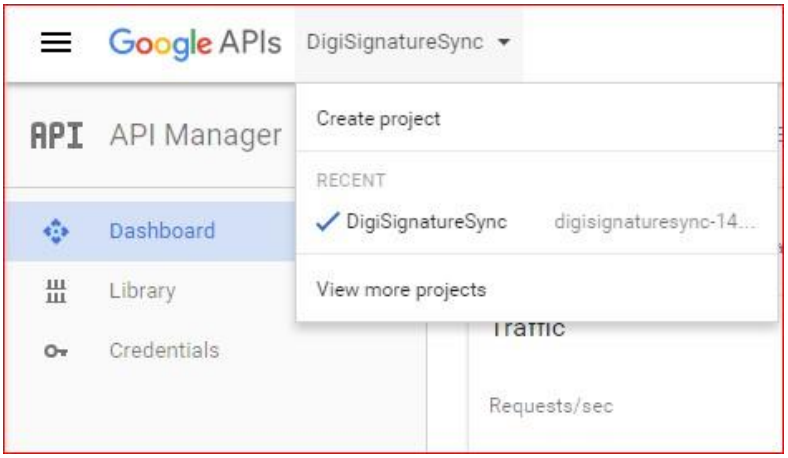
This Document is a step by step guide on how to configure both your Google domain as well as the Digi Signature Sync application.

Minimum System Requirements

- Pentium Dual Core Processor
- 2Gb Memory
- 100mb HDD Space
- 10/100 Network Card
- Internet connection with minimum 2mbps Upload speed
- Windows 7 or newer
- .Net Framework 4.5
- Active Directory Domain
- G Suite for Education or Business account

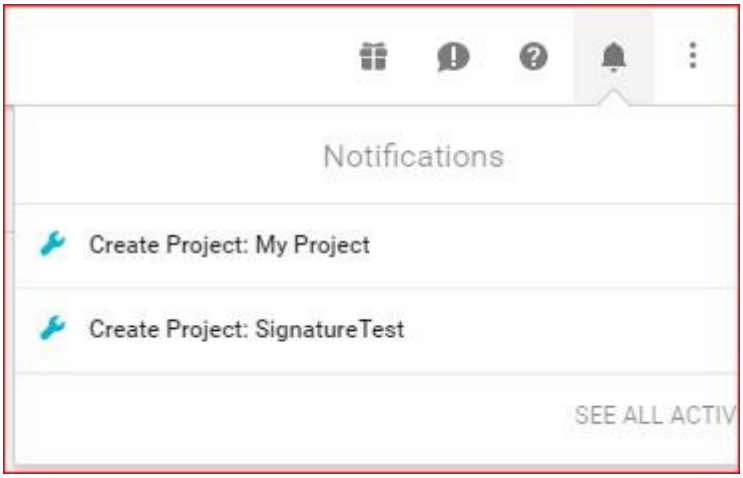
Creating a google project

- To start the process, go to https://console.developers.google.com
- Sign in with your admin account
- Please note that because of regular changes applied to the layout of the google admin console there might be changes not reflected in this document at the time of writing.
- From the Project dropdown select Create project



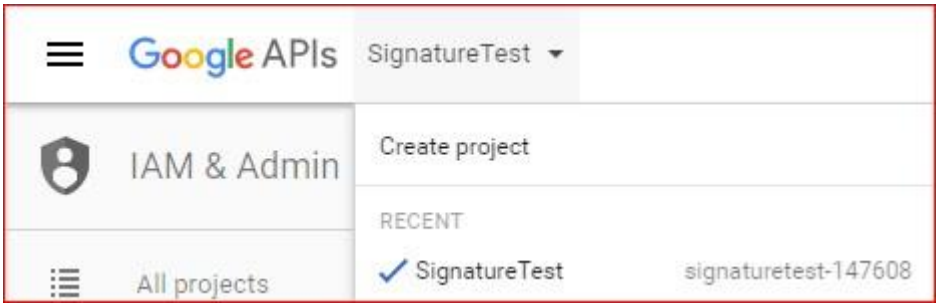
- Type in a project name, this can be any name of your choosing. Just note that this name will be used to identify the application moving forward.
- Click create

- Now you should see some activity under notifications (located on the right hand side of the page), If the project was created successfully you should see something in the line of Create Project: Your project name.

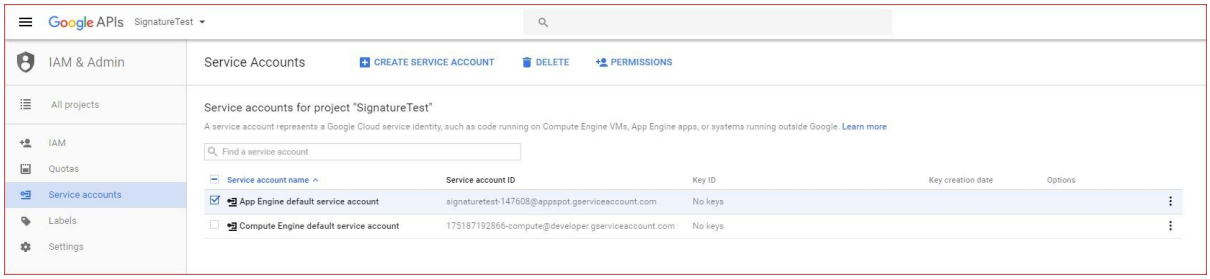


Go back to the projects drop down and select your project from the list

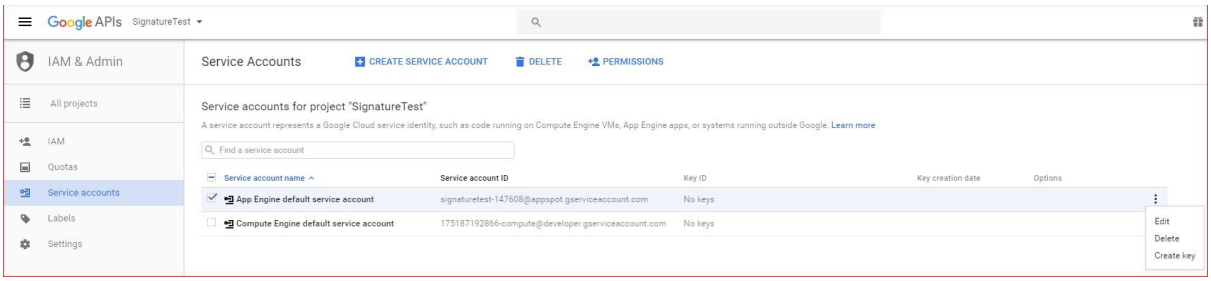
- Click on the 3 horizontal lines on the left hand side and Select IAM & Admin



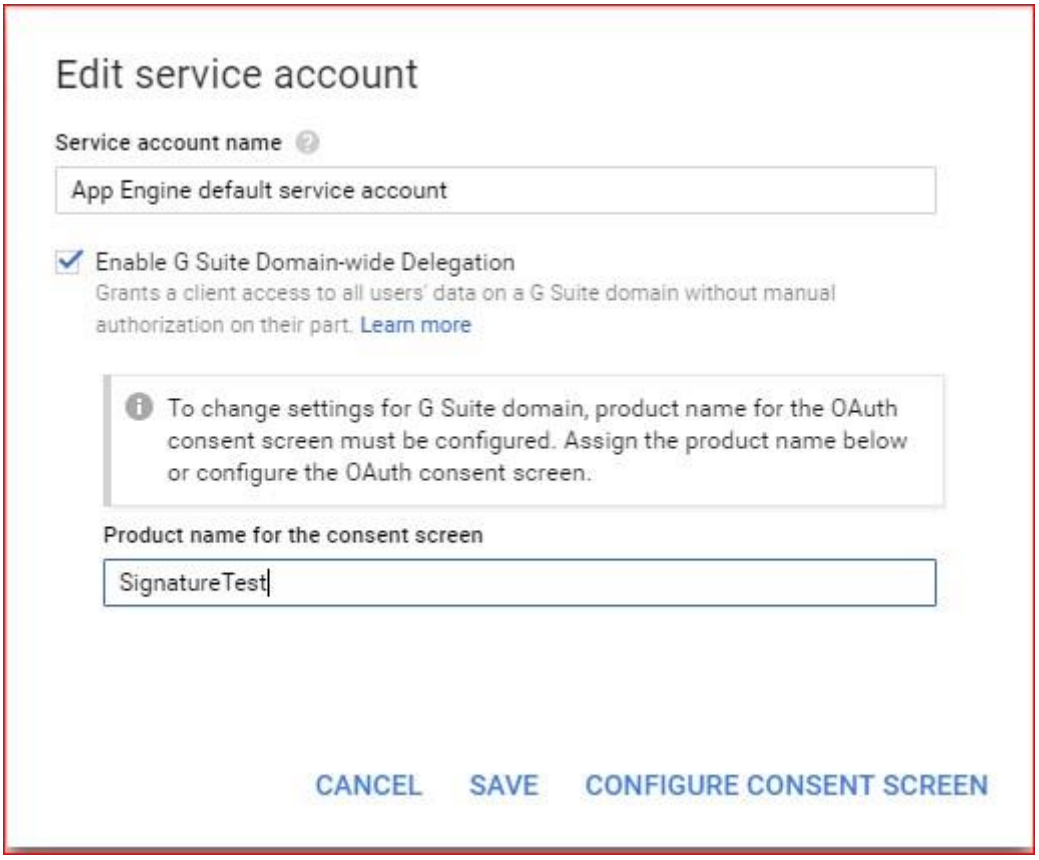
- Next you have to create a service account that will manage the communication between Digi Signature Sync and the Google mail system.
- Select Service Accounts.
- Click the App Engine default service account. (Alternatively you can create a new one as well by clicking on Create Service Account at the top of the page, under Roles you will then need to select project owner, the rest of the process should still be the same)



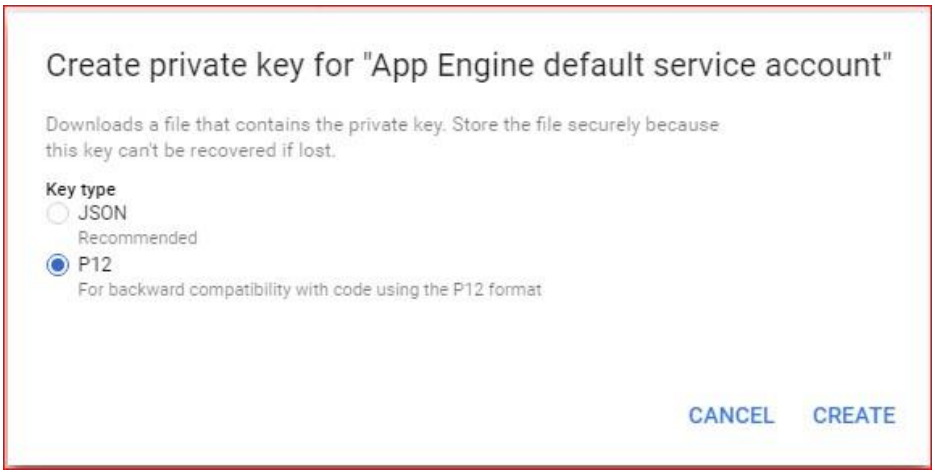
- Once selected click on the 3 dots on the right hand side of the selected service account.
- Click on edit



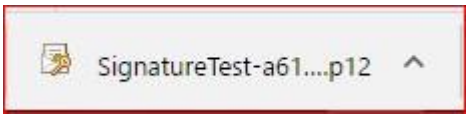
- You can leave the service account name as default
- Select Enable G Suite Domain-wide Delegation (This allows the service to interact with the user accounts without requiring their credentials or consent)
- Product name for consent screen would be the name that appears if a consent screen is used. This can be any name but preferably something to Identify the application with. - Click Save



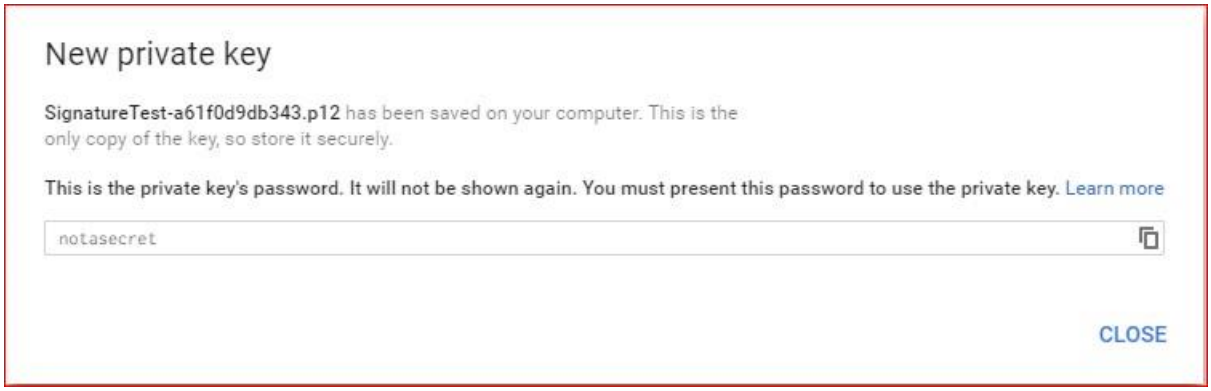
- You will be requested to create a private key
- Select P12 and click create



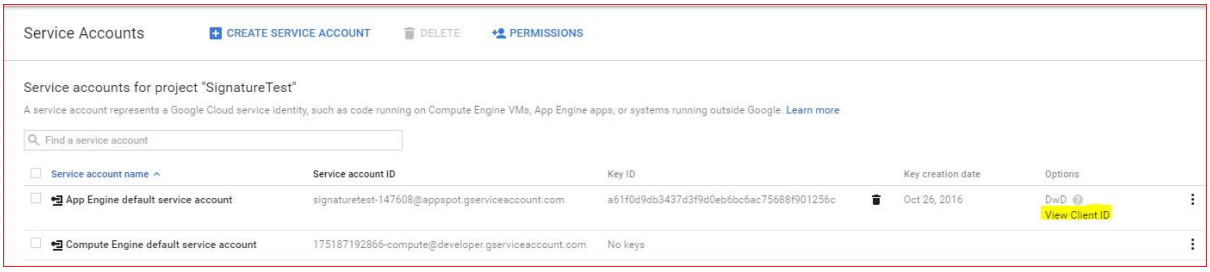
- Your browser will download a p12 certificate file



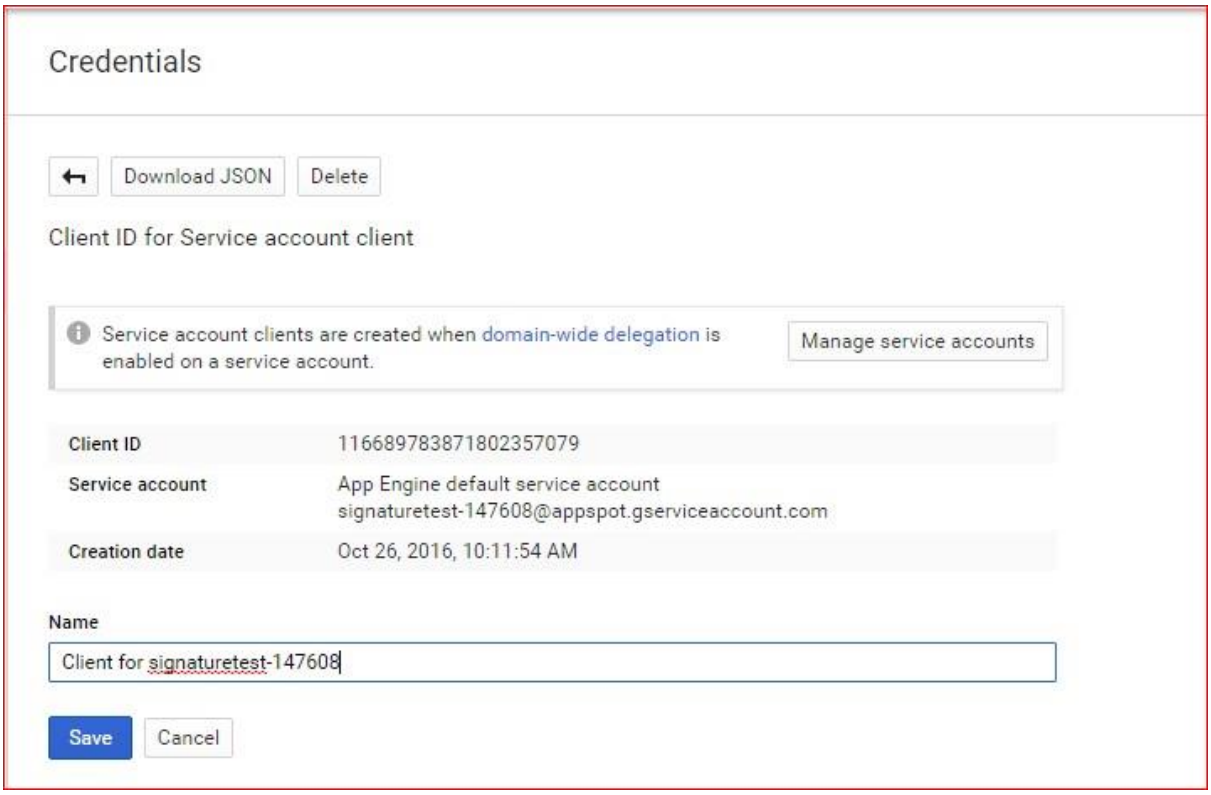
- You will be shown the secret in the certificate file, and the name of the certificate file downloaded. - Click Close



- Click on View Client ID for your Service Account

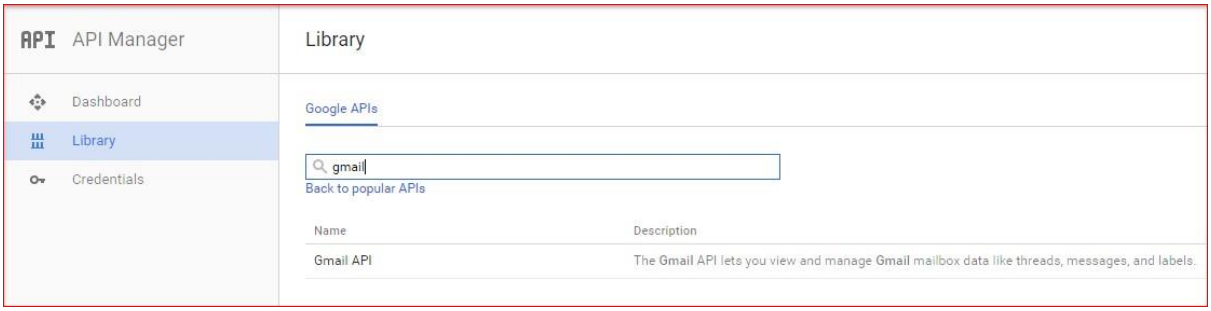


- You should see all the information required a bit later during this process.
- Take note of the Client ID and second line of the Service account information

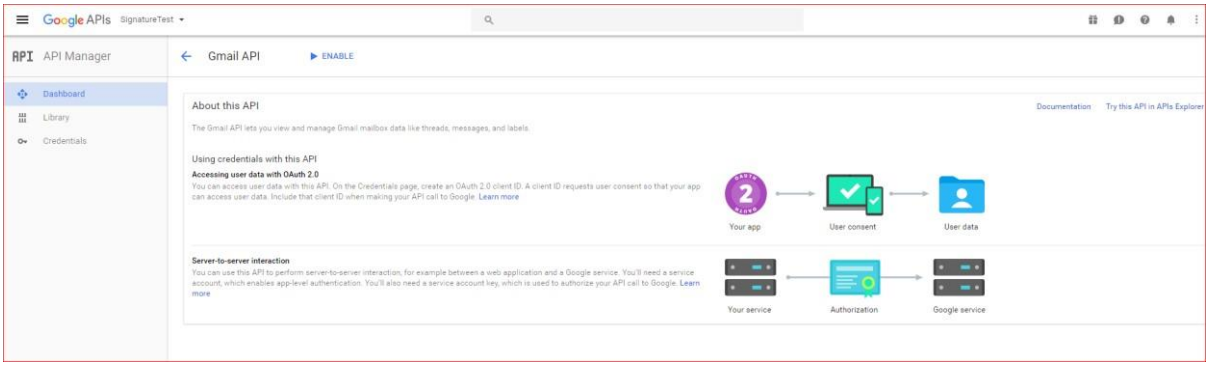


- Click on Library on the left hand side

- In the search bar type “gmail”
- Click on the Gmail API that was found

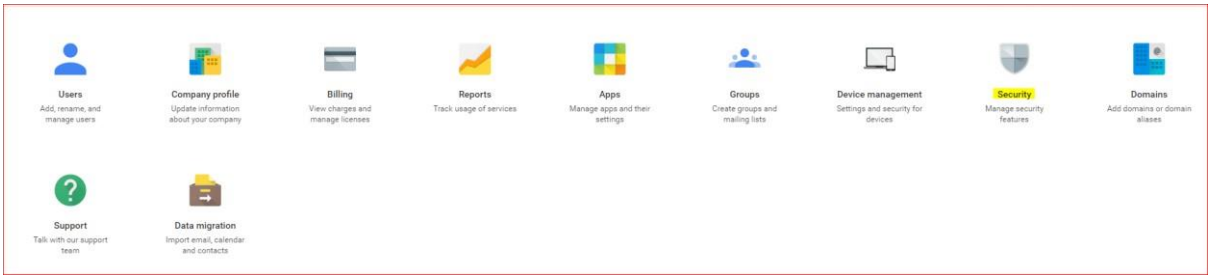


- At the top of the screen select Enable

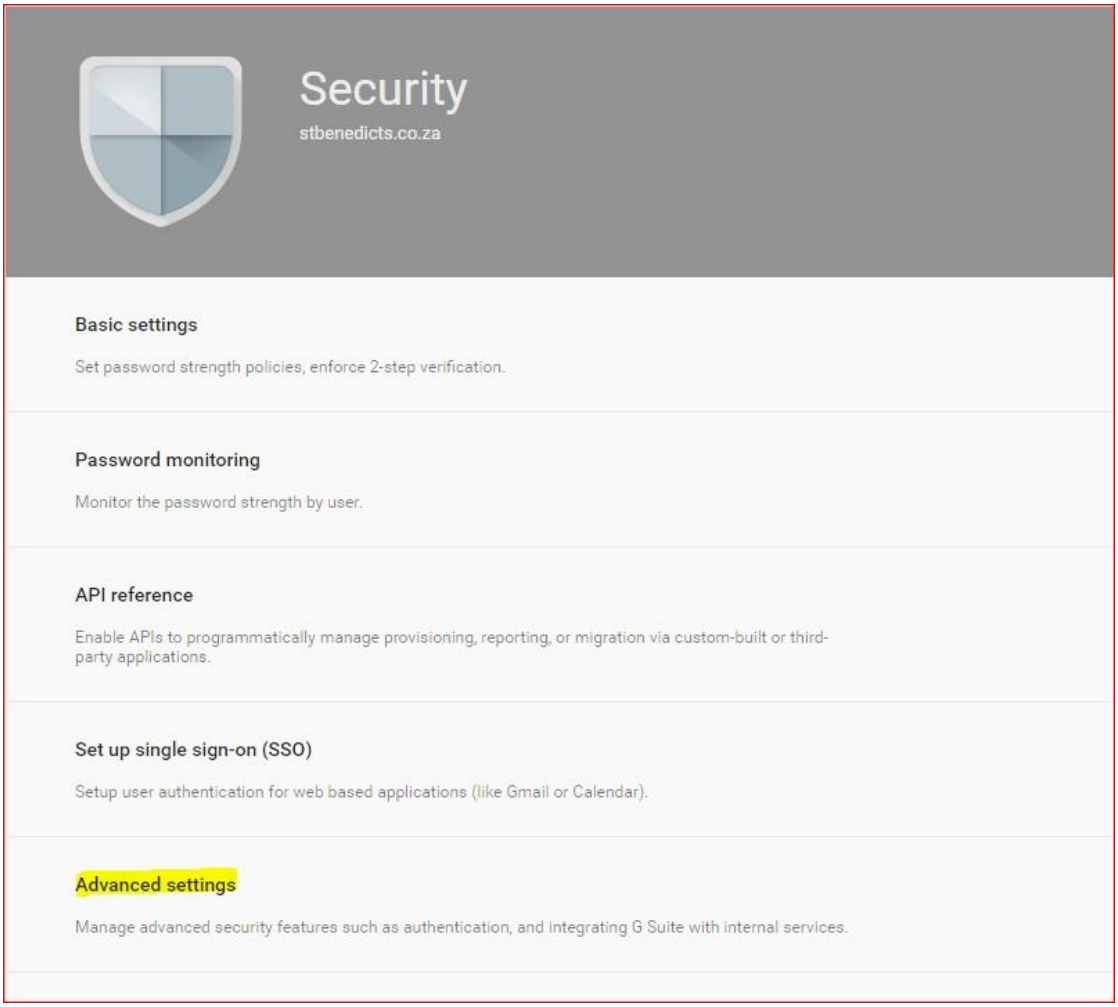


G Suite Admin Console

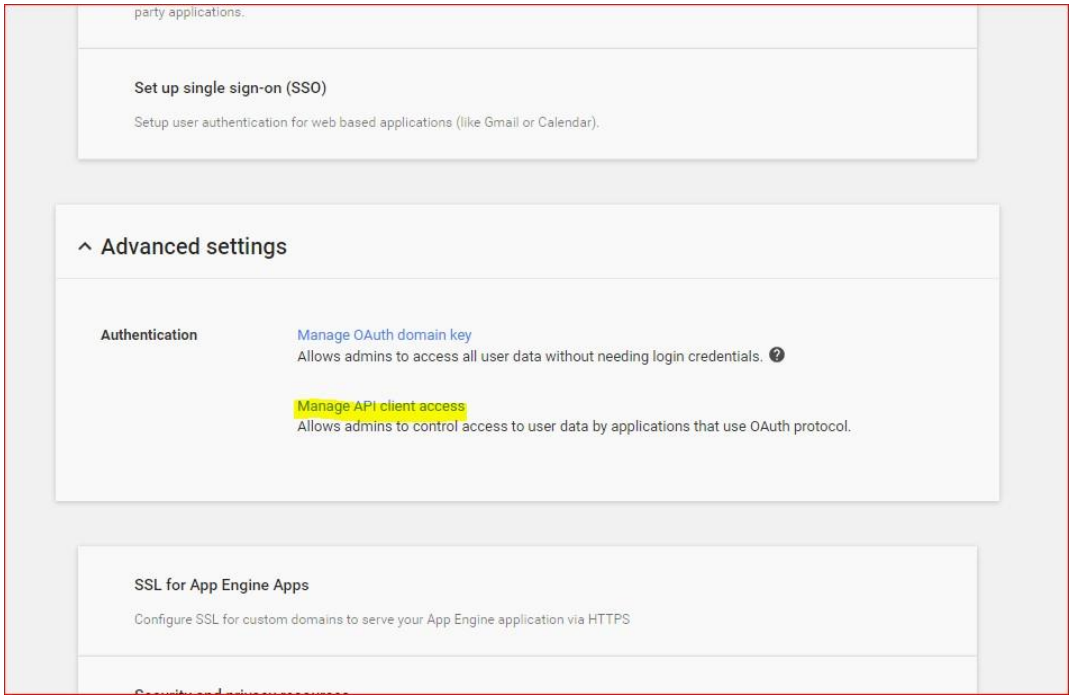
- In this second part of the process you need to configure the security settings for your application in your domain by setting a scope.
- To do this go to https://admin.google.com
- Sign in with your Admin account
- Click Security

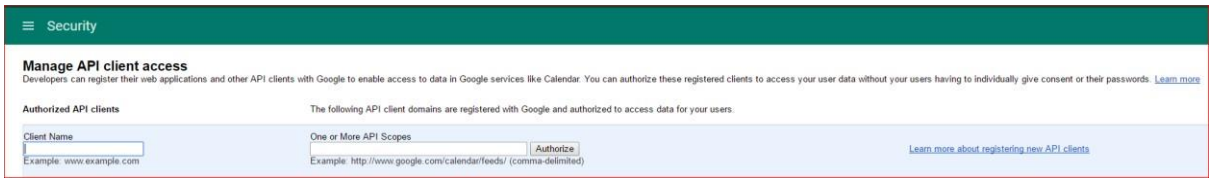


- On the security screen click on show more
- Then click on Advanced settings

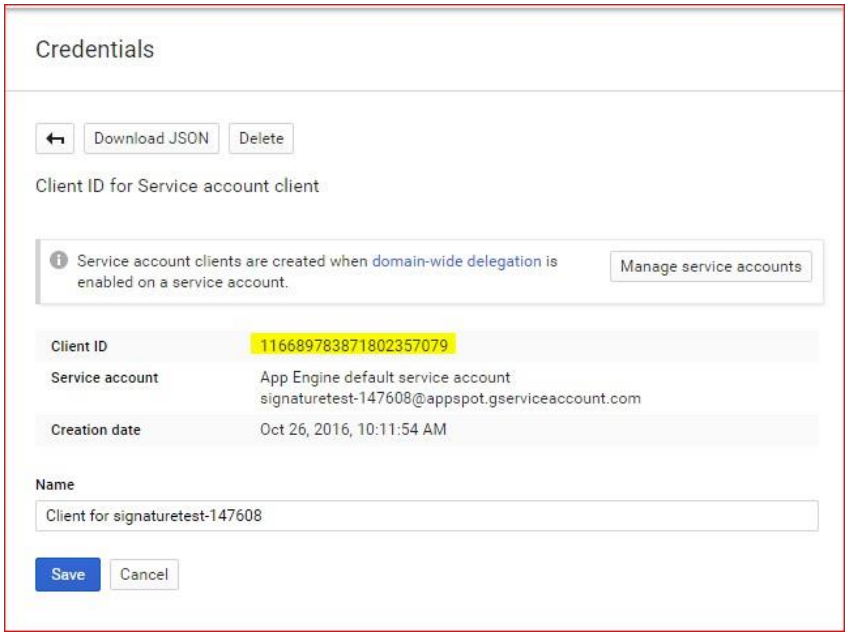


- In advanced settings click on Manage API client access





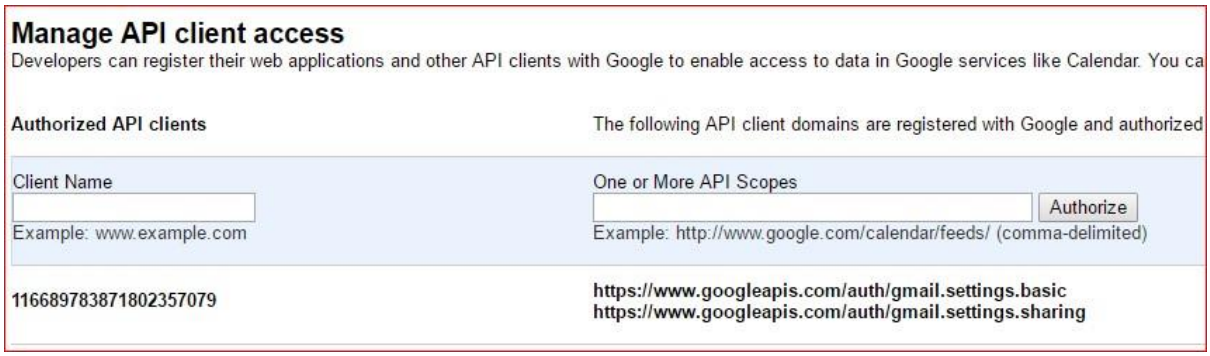
- In the Client Name field copy and paste the Client ID created earlier in this document



- In the API Scope field copy and paste the following two lines separated by a comma

https://www.googleapis.com/auth/gmail.settings.basic
https://www.googleapis.com/auth/gmail.settings.sharing

- Click Authorize
- Your Service account should now reflect in the list

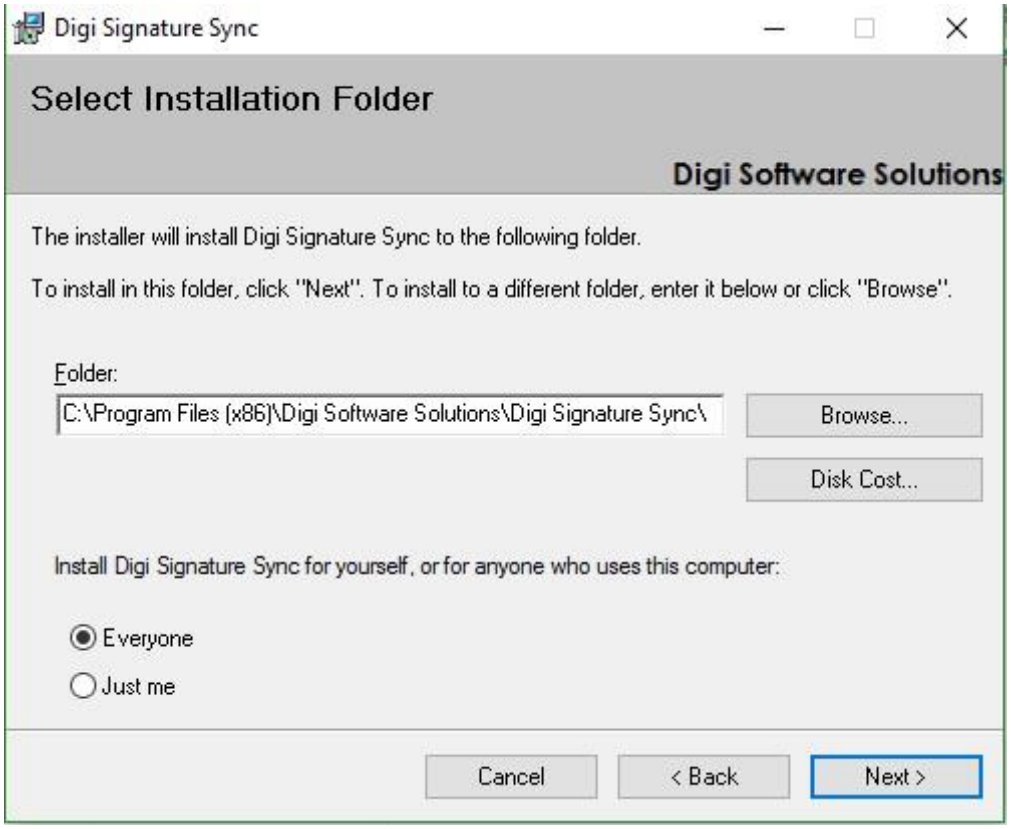


This concludes the configuration in your Google domain, it is now fully prepared to accept secure communications from the Digi Signature Sync Application.

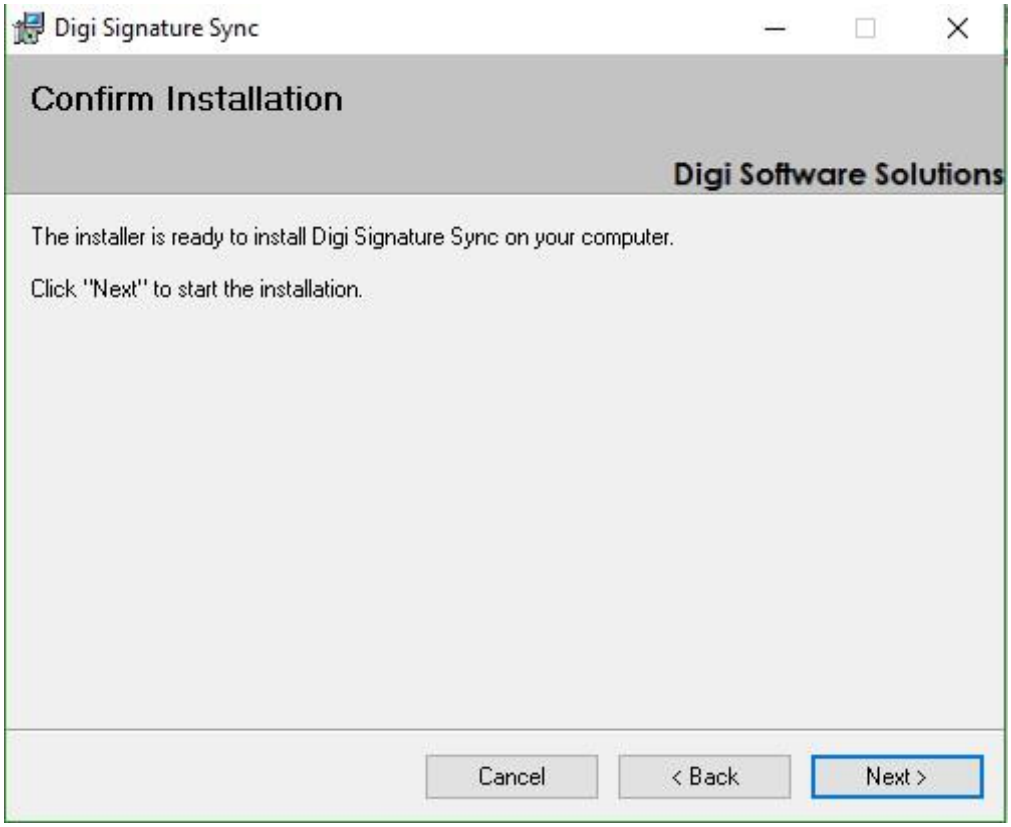
Installing Digi Signature Sync

- Run the DigiSignatureSync.msi installation file downloaded from the Digi Software Solutions website
- On the welcome page of the installer click next

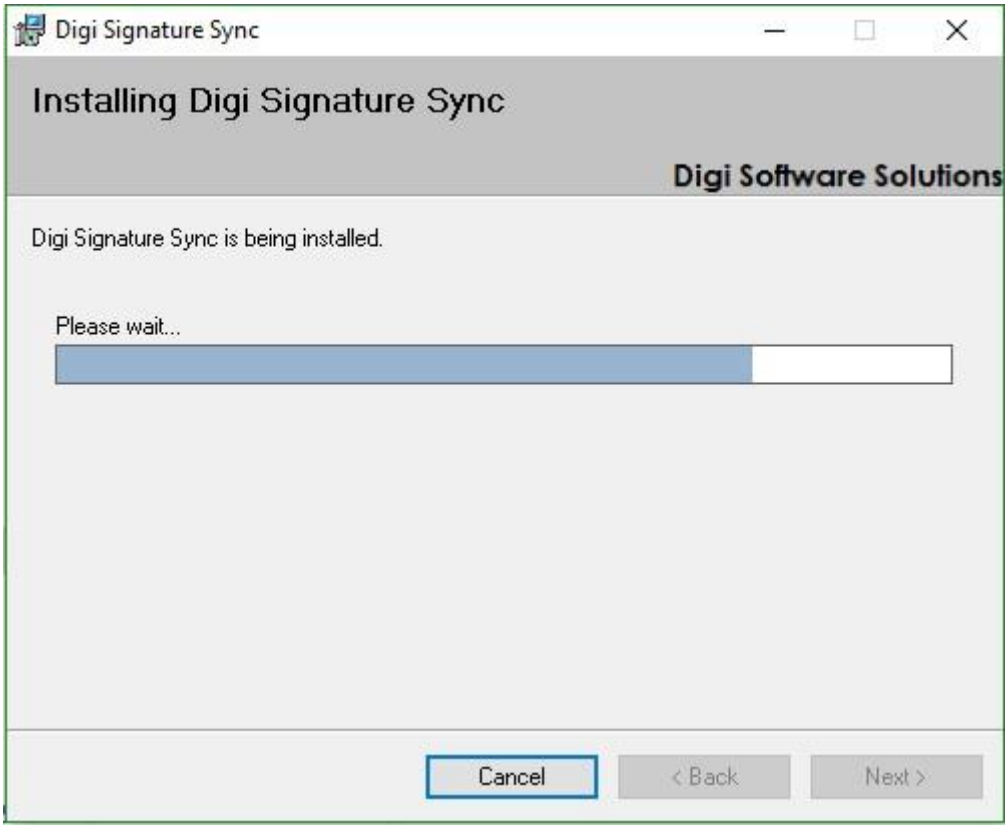
- The next screen will allow you to choose if you want to install the software for a single user or everyone that uses the computer. Select Everyone.
- You can also specify an alternate installation directory if required
- Once you are satisfied with the options click next
- On the Confirm Installation page click next again


Digi Signature Sync
Select Installation Folder
Digi Software Solutions
The installer will install Digi Signature Sync to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files (x86)\Digi Software Solutions\Digi Signature Sync\
Browse...
Disk Cost...
Install Digi Signature Sync for yourself, or for anyone who uses this computer:
Everyone
Just me
Cancel
< Back
Next >

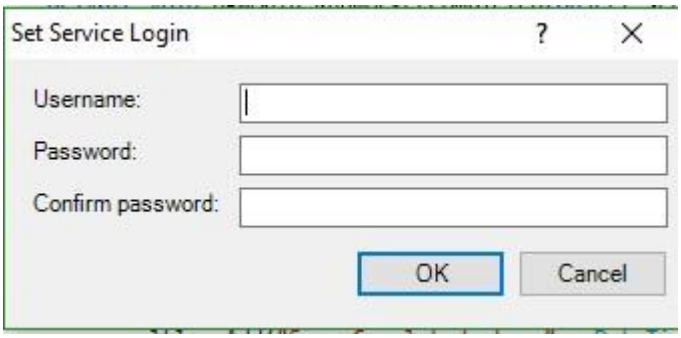
-



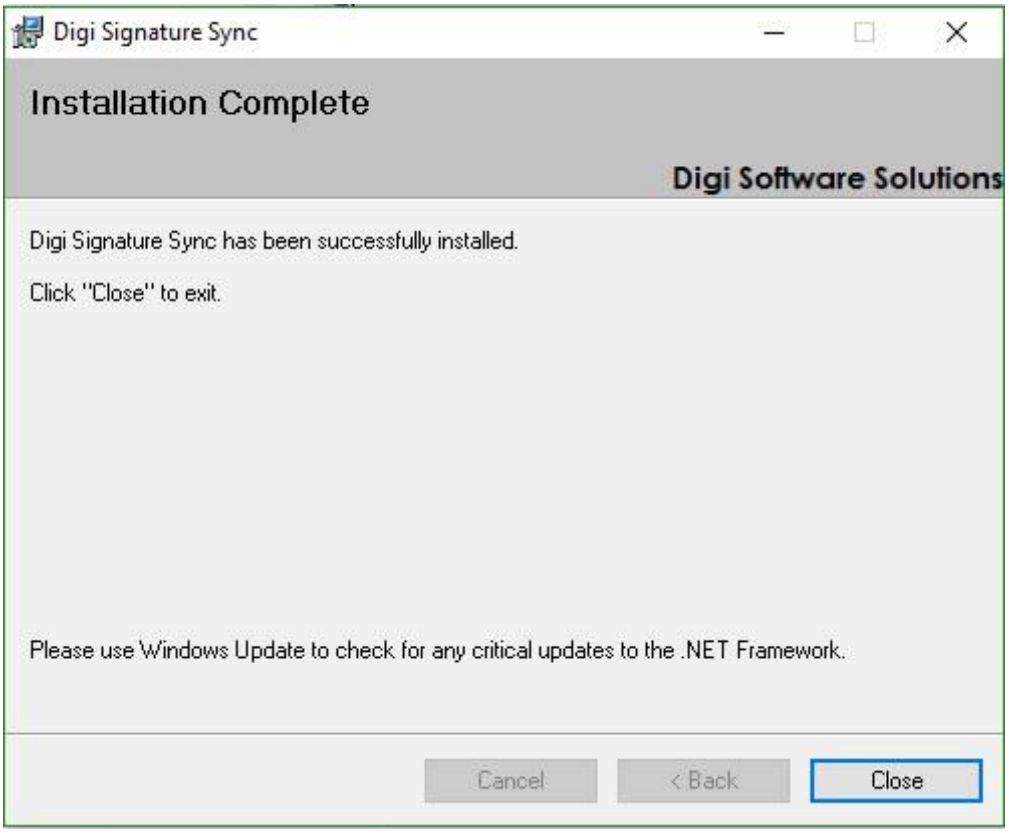
- The installation will start and just before it finishes it will request for user account information for the windows service.
- The user account the service uses needs to have Active Directory read access on all the organizational units you want to gather information from.



- Username must be entered in the following format: MyDomain\Username
- Type in the user account password
- Confirm the user account password
- Click ok



- The installation will finish and you can click on close.

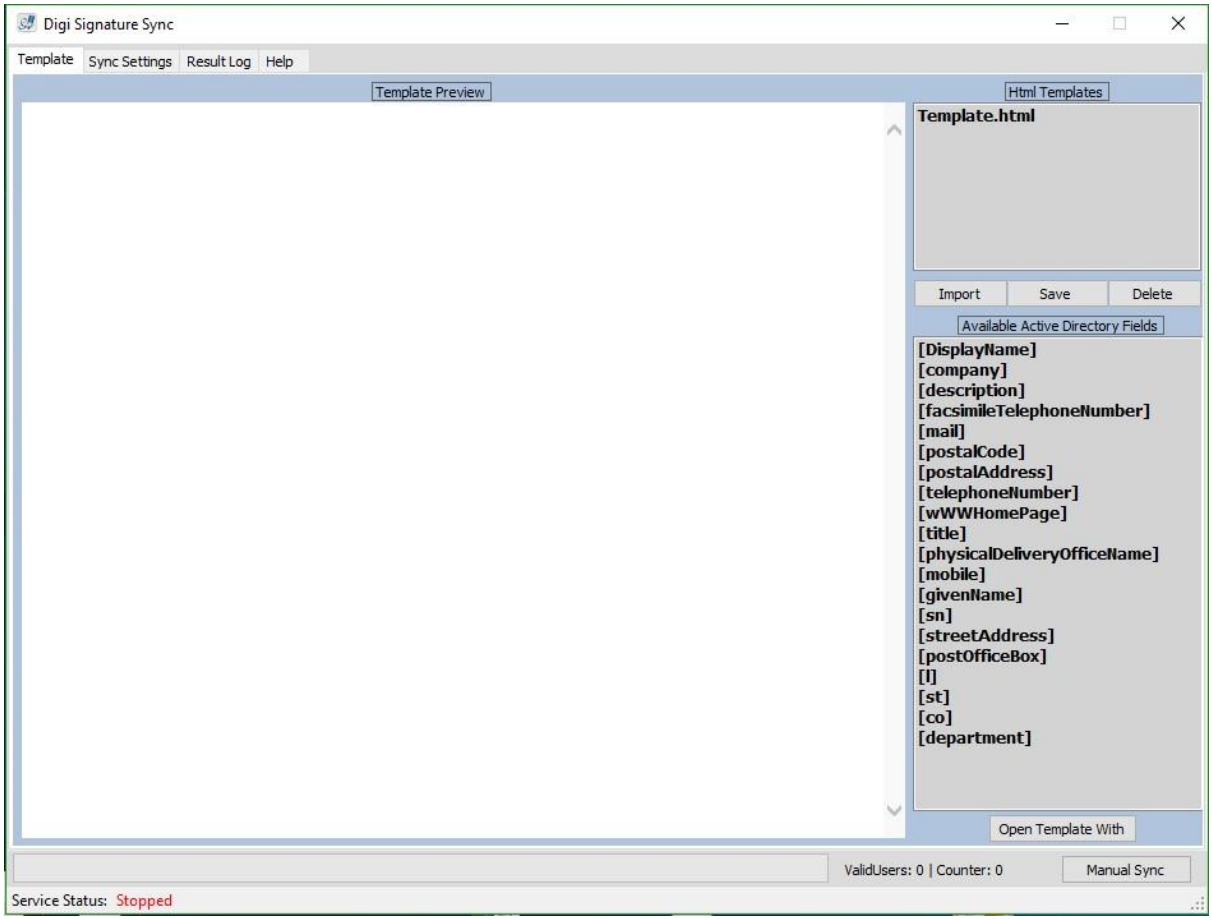


This concludes the installation portion of the software

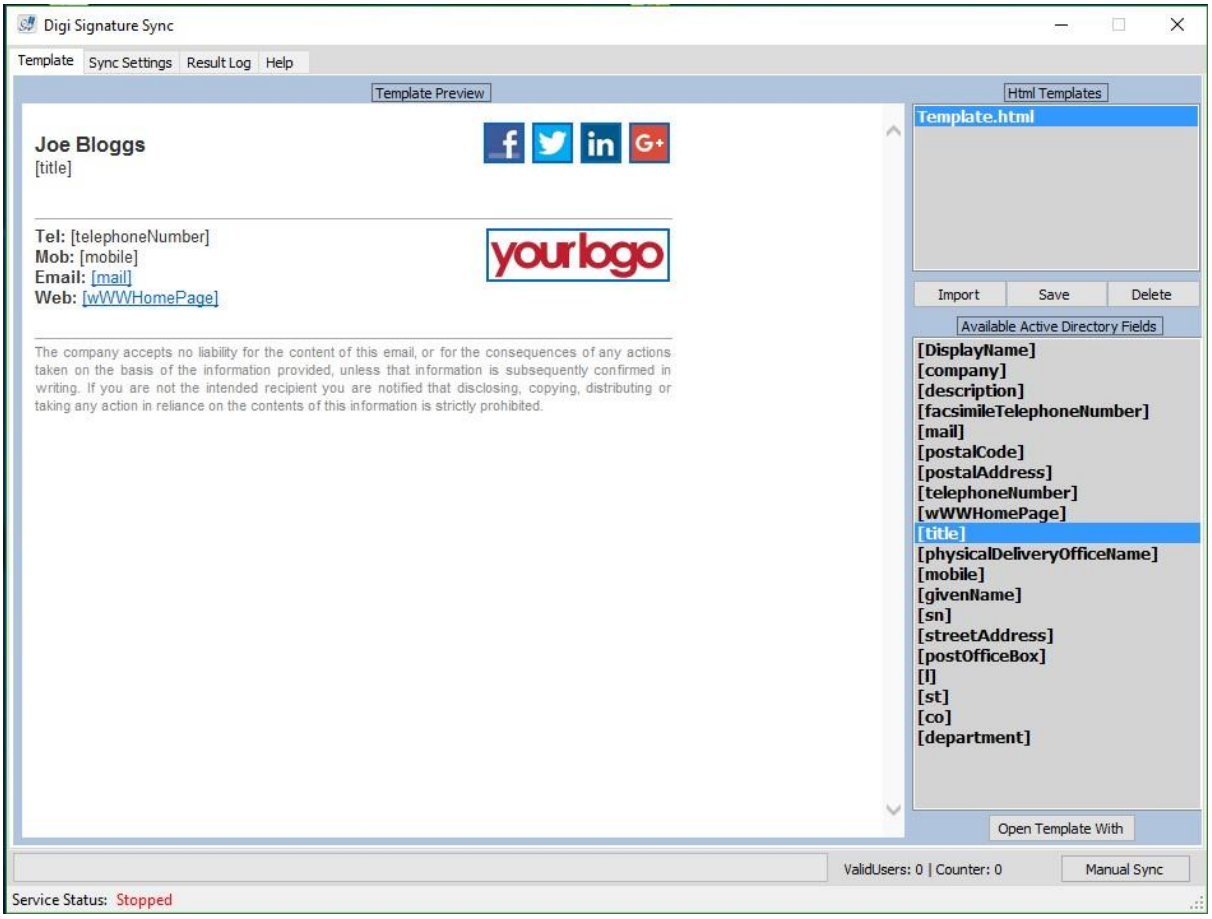
Configuring Digi Signature Sync

Templates

- Open the Digi Signature Sync application either from the desktop shortcut or the applications menu
- The application requires administrator access on the computer to be able to control the windows service and will request elevation on start up.
- The default view in the application on start-up is the Templates section where you can add, remove, edit your signature templates.



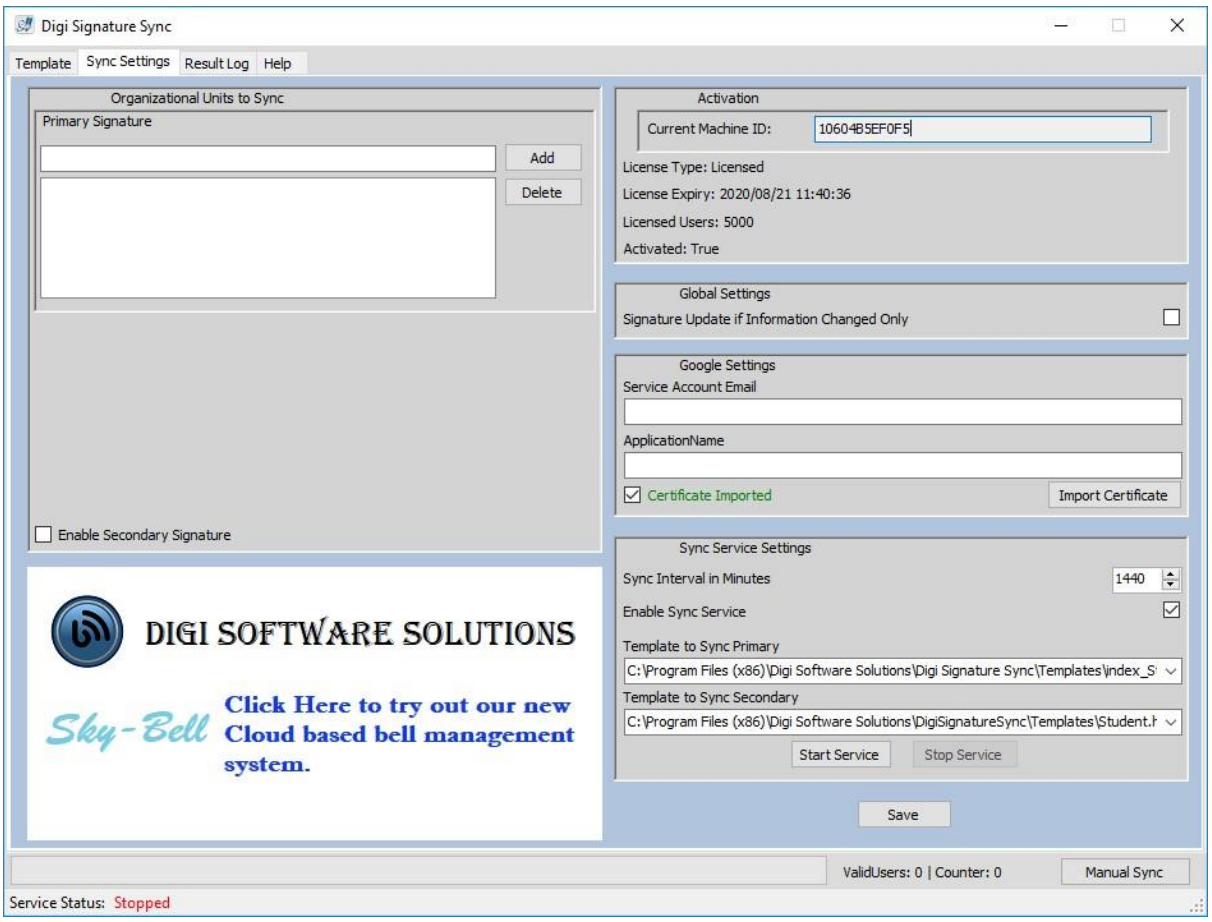
- To preview a Template, click on the Template name in the HTML Templates list
- It will load the Template into the preview pane for editing
- You can also click on Import below the HTML Templates list to select an HTML file from your local computer containing your custom signature.



- To add dynamic fields to a template, highlight the text you would like to be generated from info within Active Directory and select the desired Active Directory field you would like to retrieve the information from.
- For Example: Highlight the name “Joe Bloggs” then click on [DisplayName] from the Active Directory Fields List
- Once done this will now allow the application to dynamically add every individual users Display Name in AD into the HTML Signature before uploading it to google.
- You can also create dynamic hyperlinks.
- To create a dynamic mailto hyperlink to an individual user email address you can do the following:
- Select the user email in the template and click on the [mail] AD field, this will replace a static email in the template with the dynamic mail flag. Now select the [mail] flag in your template you just inserted and right click on the selected text, select insert hyperlink from the menu. In the resulting window select mailto from the drop down and in the textbox below right click after the mailto: flag and select paste to insert the dynamic link [mail] as the hyperlink destination. Click OK
- The link will turn blue once converted to a hyperlink
- The same procedure can be followed for website links as well.

Sync Settings

- In the Sync Settings section, you can configure all the critical components within the application, these include: Organisational Units containing users, Activation of the software, Google account authentication settings, Settings to configure auto synchronisation via the windows service.

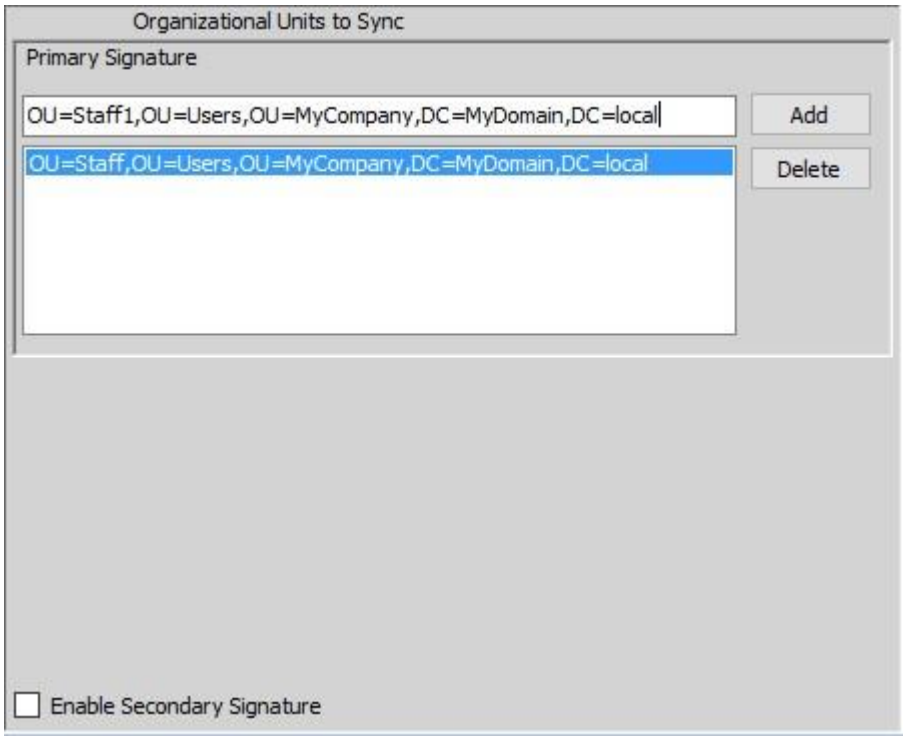


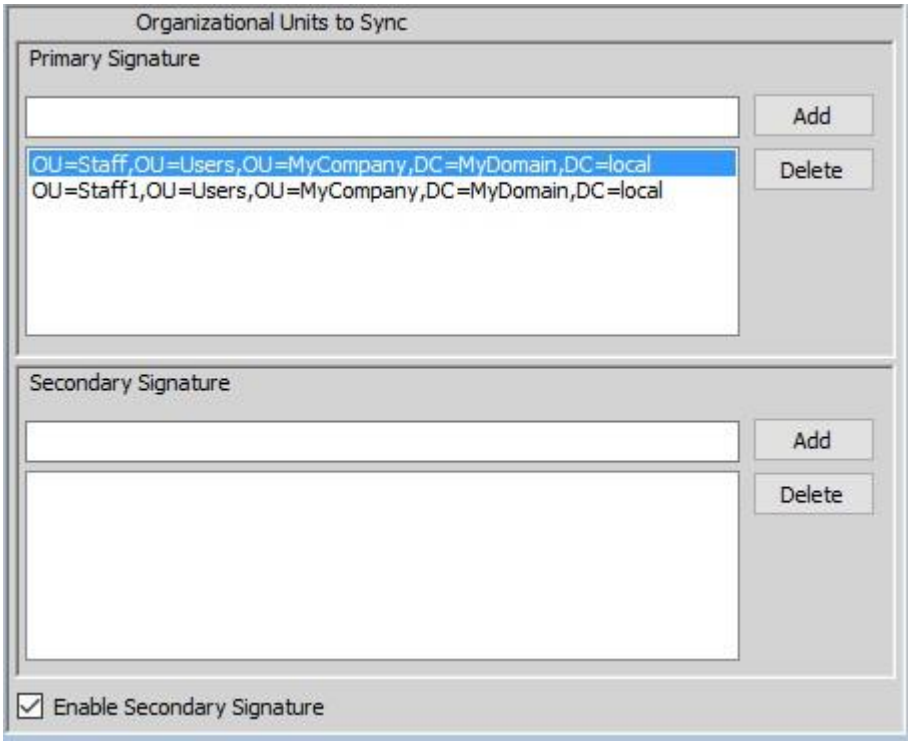
Activation

- You can activate the software in the Activation section by using the Email used when purchasing the software and the key provided by Digi Software Solutions.

Organizational Units

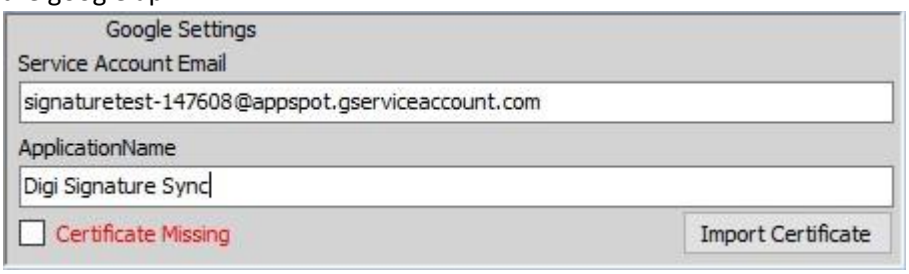
- This section is used to control which users are synced with google and if they are part of the staff (Primary Signature) or Students (Secondary Signature) in a school environment.
- To add an organizational unit, copy the distinguished Name property of the desired OU in Active Directory and paste it into the text box next to the Add button.
- Click add to insert the OU in the list
- You can add as many OU's as you require
- To enable the secondary signature click on the Enable Secondary Signature check box
- Follow the same procedure as the primary signature to add OU's you would like to sync the secondary template to





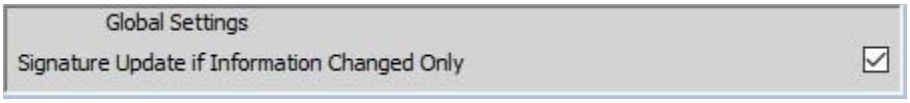
Google Settings

- Enter your service account email address obtained earlier when you created the google service account for your google domain
- The application name you can leave as Digi Signature Sync
- Click on Import Certificate and browse for the .p12 file retrieved from google during the service account setup.
- Once the certificate file is imported the check box shown below will have a tick and green text stating that the Certificate has been imported
- This section is required to setup a secure transmission channel between the application and the google api



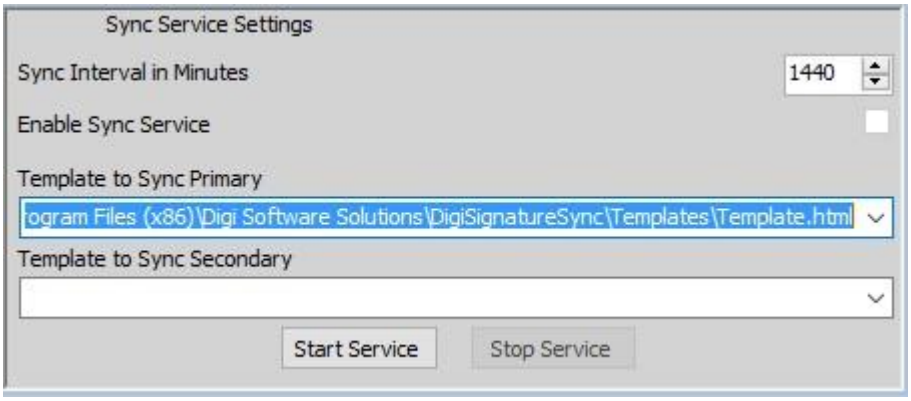
Global Settings

- Enable the “Signature Update if Information Changed Only” option to monitor changes to active directory and only update user signatures that changed since the last sync. (Recommended)



Sync Service Settings

- These settings are used to configure the auto sync interval for the windows service and to enable or disable the auto sync feature as well as setting the templates for the Primary and Secondary Sync

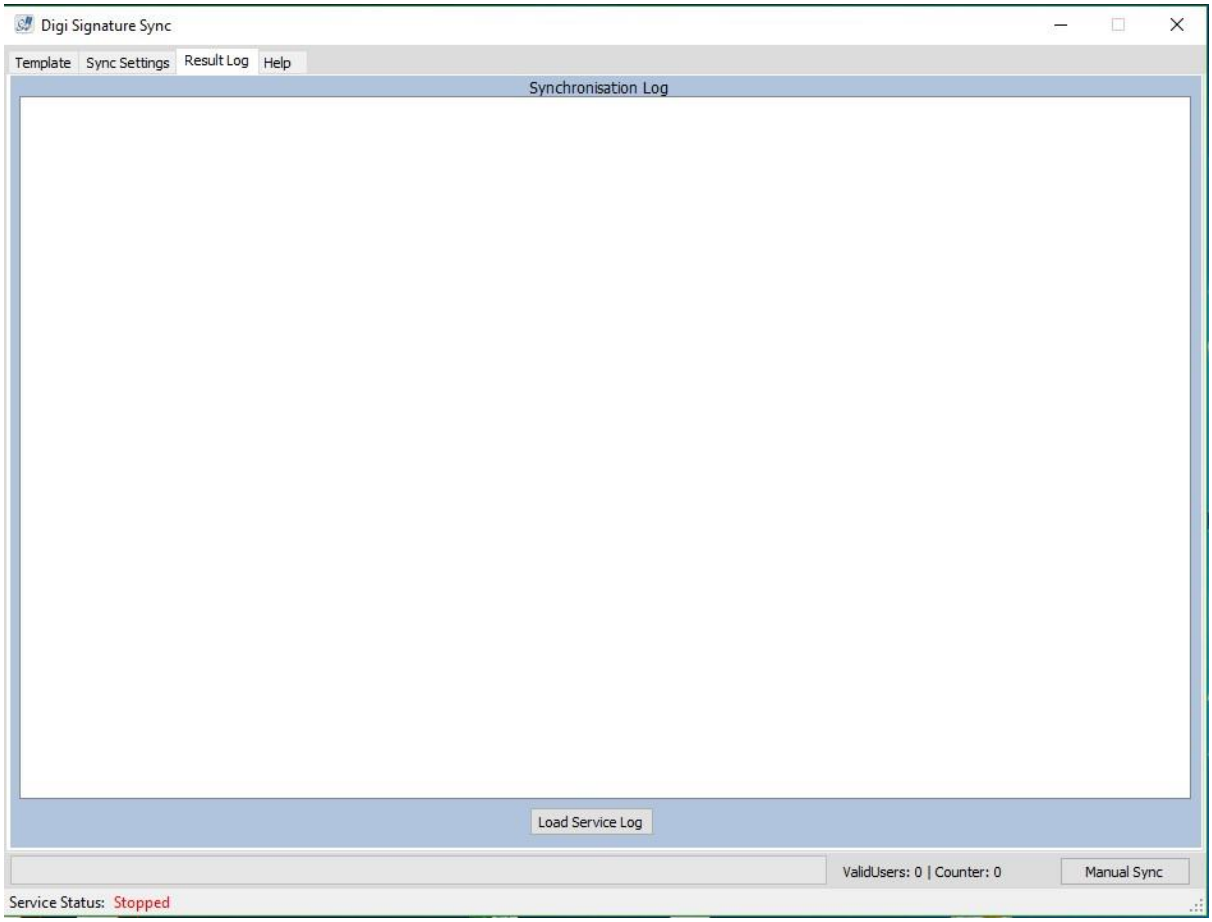


- Sync Interval is used to set the amount of minutes between each auto sync, the minimum value is 1440(24 Hours) and the maximum is 10080(7 Days). The Default setting is 1440
- Enable Sync Service is used to enable or disable the auto sync feature
- Template to Sync Primary is used to select which template to sync to all OU’s in the Primary signature list.
- Template to Sync Secondary is used to select the template to sync to all OU’s in the Secondary signature list
- Start/Stop service buttons can be used to control the windows service.

Result Log

- The result log contains the progress report of the sync process when doing a manual sync in the Digi Signature Sync application
- You can also load the windows server log into the Result log view pane by clicking on the Load Service Log button
- The windows service will update the log file at the end of each synchronization

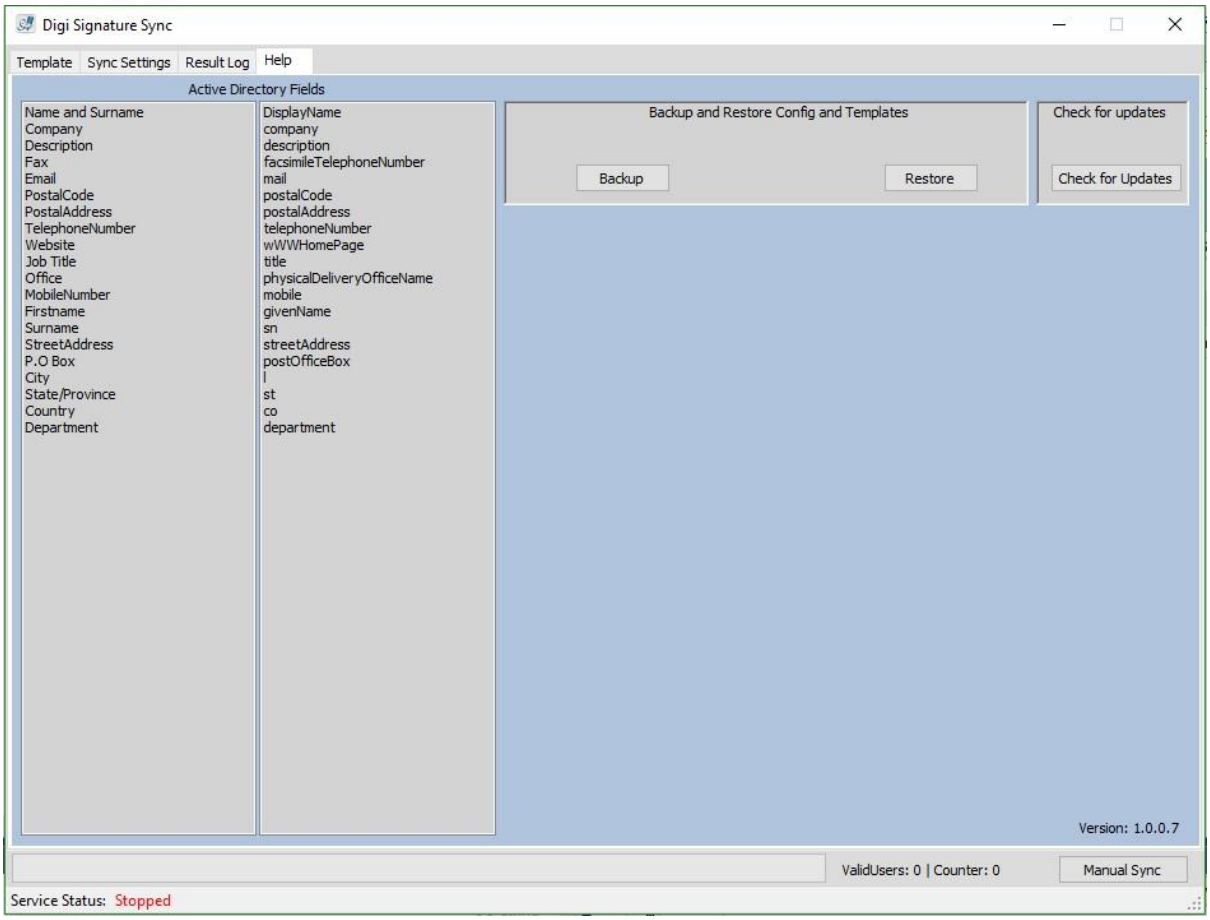
- The log will contain the following information
  - Time started
  - Templates Generated
  - Sync Threads Started
  - Each user account synched with a result (Success/Failed)
  - Time Completed



Help

- The help window is used if you are unsure what the Active Directory field equivalent is of the information you want to insert in the signature.
- A backup of the entire application configuration can be created by clicking on the Backup button, to restore a backup click on restore and point it to a .bkp file created at an earlier time.

- In the bottom left hand corner you will find the current application version of your Digi Signature Sync application



Manual Sync

- Once the application is configured you can start a manual sync by clicking on the Manual Sync button
- Once a sync is started it cannot be aborted whilst in progress

Configuration best practises

- If you don't have Secondary Signature OU's added to the list disable the feature
- Always select a single OU containing a test account first when you initially setup the application and your first Signature Template to prevent deploying a problematic signature to your entire domain
- After a sync of a new template always check in one user's signature settings in their google mailbox to ensure the signature looks as expected.
- Google does a "Clean Up" of the HTML code once received and will remove any non-supported HTML features or incorrect html structure which can lead to signatures not displaying correctly.
- The Digi Signature Sync Application has some HTML editing capabilities but should not be used as your primary HTML creation software. Its function is primarily to insert the dynamic fields into an existing template rather than being used as an editing tool.
- The sync speed of the system will depend on the complexity of the HTML signatures being imported and the speed of your internet connection's upload.
- To use the Auto Sync feature, install the software on a computer or server that will be on 24 hours a day. Alternatively, you can do manual sync's as needed.
- Ensure that any images used in the signature points to a location where the images can be accessed publicly. Usable locations would be your School/Company web server, Google drive (Share the images publicly) or uploading your images in .png format to our Digi Software Solutions server. (See Account Management Portal Section)

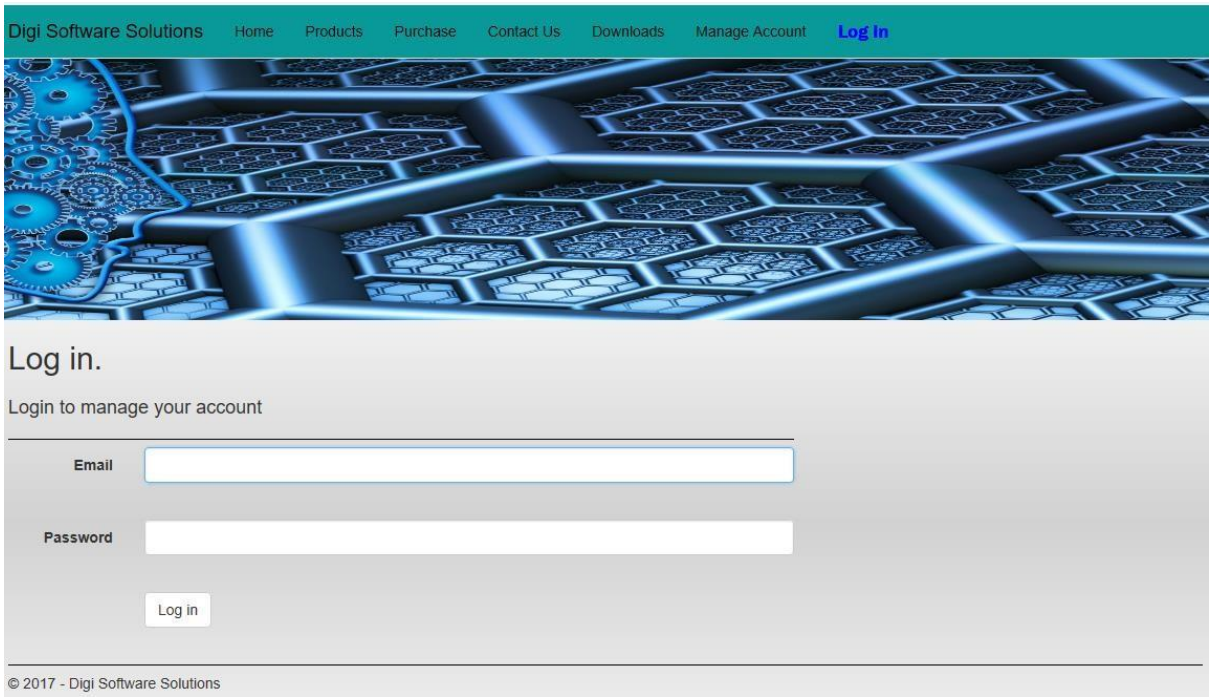
Account Management Portal

The Management Portal on the Digi Software Solutions Website can be used to do any of the following tasks.

- Release an activated license from a computer so it can be re-used on a different machine.
- Change your account password
- Purchase additional user licenses for your existing license code
- Upload images to be linked to your signatures
- Download your purchase receipts from previous purchases

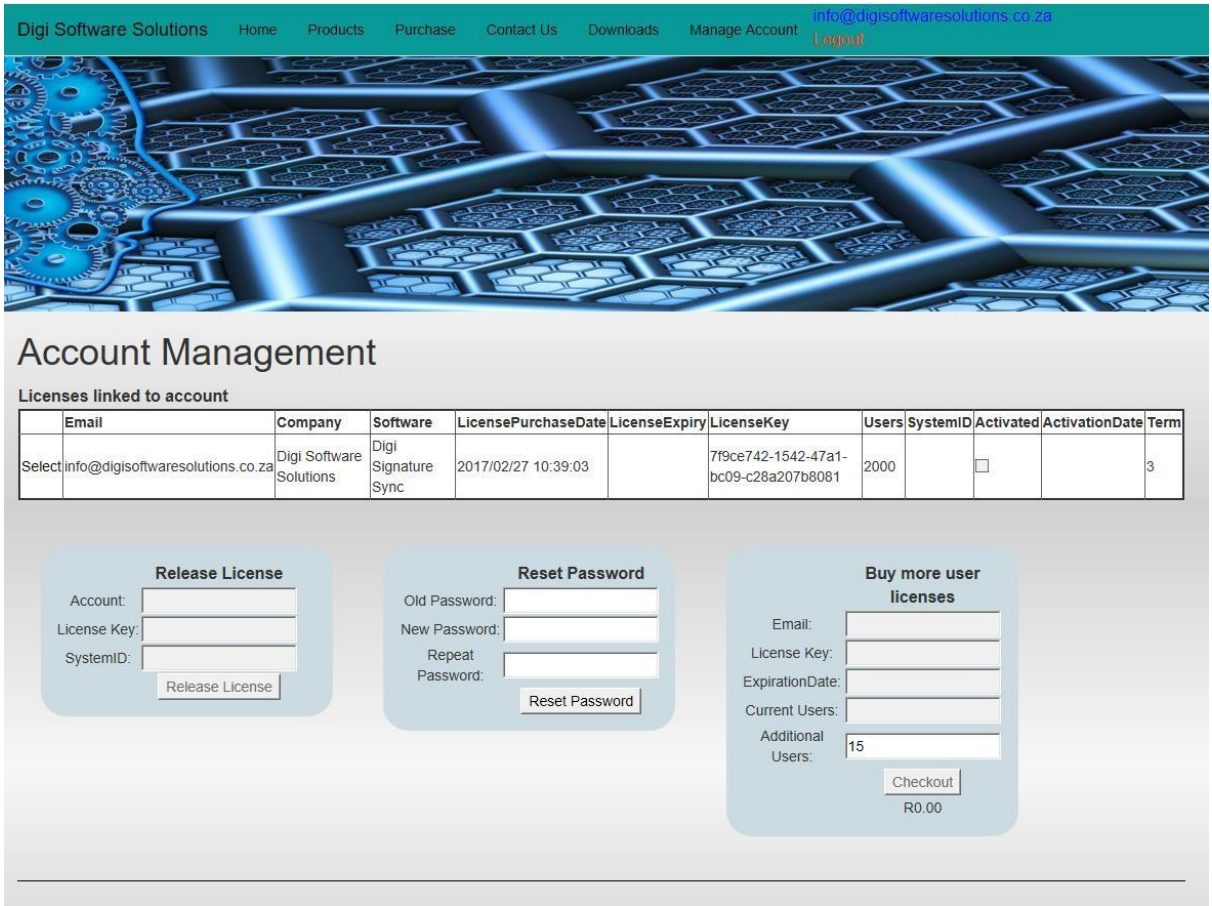
Login to the Account Management Portal

- Go to http://www.digisoftwaresolutions.co.za
- Click on Manage Account
- On the login page type in your email address and the password sent to you when you purchased your license
- Click log in

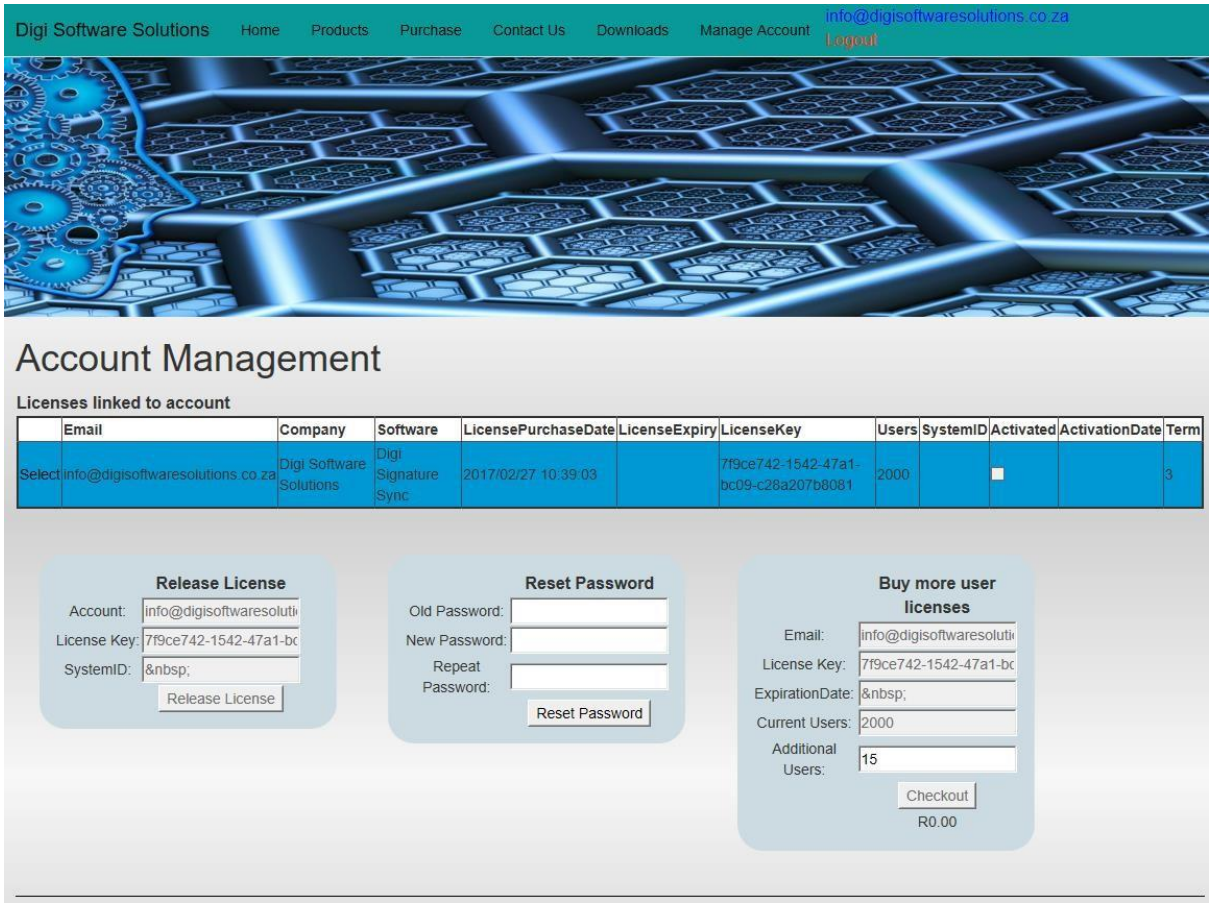


Account Management (Sky-Bell Clients Only)

- In the top table you will see all the licenses currently linked to your account, this will display all licenses including Expired, Activated and non-Activated licenses. (Sky-Bell Only)



- By clicking on the Select link next to the required license it will auto populate the text boxes below for managing that specific license.
- You can also increase your selected license user limit by changing the amount of additional license you need to add. Once you click on checkout it will calculate the remainder of your license term and the amount of the additional users required to give you an amount due.
- If you want to proceed with the payment you can click on the “Pay using Pay Fast” button and process the payment.
- Once the payment clears it will automatically increase the license limit on your application the next time you open it.



- You can reset your password for your management portal by entering your Old password, then your new password and confirming the new password.
- Click on Reset Password to commit the change.
- This password is only used to login to your Account Management Portal and does not affect your Sky-Bell licenses.

Uploading Images

- If you want to use the Digi Software Solutions servers as a public location to store your signature images you can do so by converting them to .png format and ensuring their size is less than 150kb per image
- Click browse and select the image you want to upload from a location on your computer

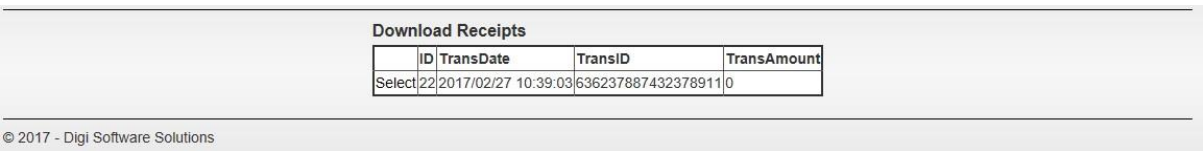
- Give it a friendly name so you can Identify the image if you have multiple images for example “Company Logo” or “Facebook Icon”
- Click the upload button to upload the image to the server

- Once the image is uploaded you will see it appear in a table
- You will see an image link displayed next to the friendly name you entered during the upload process, which you can copy to your signature template as the source of your image.
- These links will be accessible by the public which is a requirement for HTML signatures
- Every time someone opens one of your emails, the images will be retrieved from the Digi Signature Sync Server and displayed in their mail client.

- Using this feature is not a requirement for the app to function, if you prefer you can use your own company web server, google drive or any other public accessible storage location to store your images and use those links respectively in your signature templates.

Downloading Previous Receipts

- If you need to obtain a receipt of any of your previous purchases you can download it from the Download Receipts section at the bottom of the page
- Click on the Select link next to the required receipt to initiate a download of the receipt in HTML format



Thank you for choosing to use Digi Signature Sync