How to change an existing Enterprise PDM user name to match a Windows login name

Scenarios

- You have set up a vault with users using the Enterprise PDM login type and want to change to Windows login type, but keep the existing user permissions in the vault.
- A Windows user profile has changed name and you wish to keep the existing user permissions for the renamed user in the vault as well.

Considerations

- When using the Windows login type – The username in the vault will be the same as the logged in Windows User.
- Passwords will have to be changed using the standard Windows user manager (Active Directory) instead of Enterprise PDM user manager.
- Once you have changed (if the names change) the Enterprise PDM user name to match the Windows user login name, all vault history information for files and activities will reflect the new name. (Values containing the username in file data card history for existing files are not affected.)
- The "Admin" login cannot be renamed or linked to a Windows login – it must remain as is.
- Before making any manual changes to the Enterprise PDM database you should take a complete backup of the database.
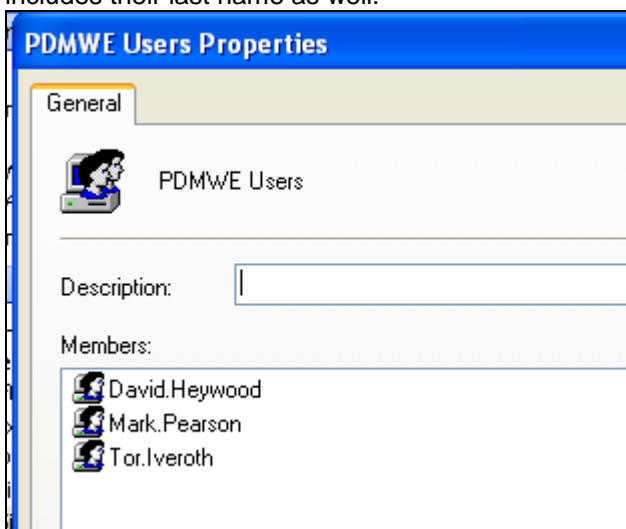
Procedure

The following will show an example of changing a vault from using Enterprise login to Windows login and matching the existing users to the Windows names
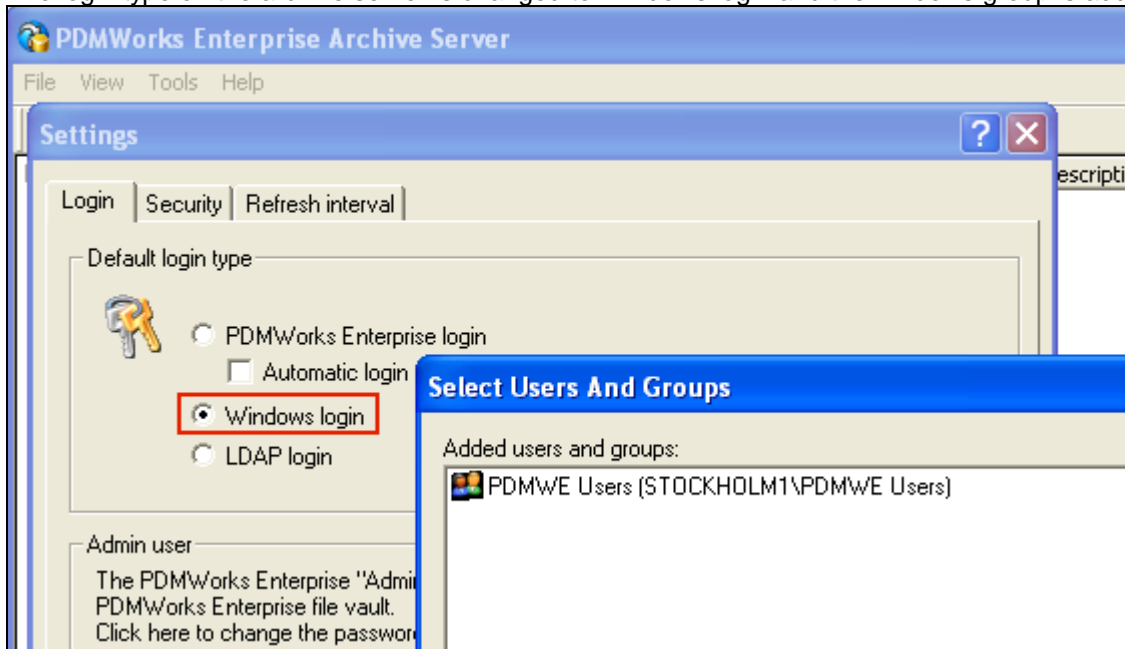
1. File vault currently has 3 users using Enterprise PDM login type.
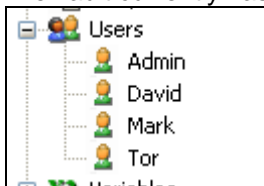
2. A Windows group (for example Active Directory group) contains the same users, but the login name includes their last name as well.

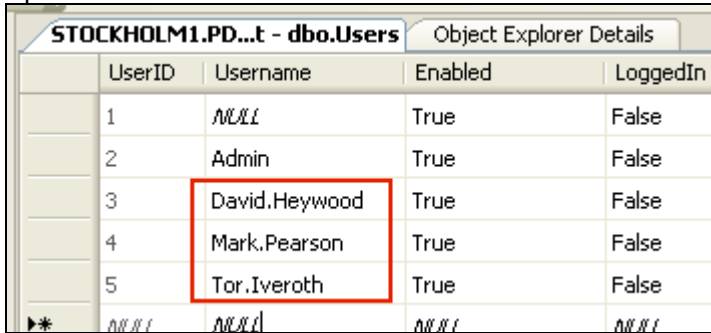3. The login type on the archive server is changed to Windows login and the windows group is added.

4. Note that since the existing usernames in the vault will not match the Windows login names exactly, they will now show up in the administration tool with red plus icons, indicating the logins might not work for these users. (i.e. they are found in the vault database, but cannot be found in the Windows group). In SWPDM 2015 SP4 and later you need to right-click the Users node and select "Validate logins" for the red plus icons to show up.
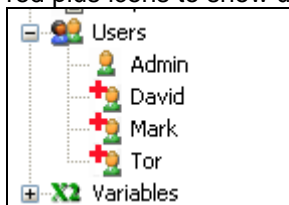
5. To "update" the users in the vault – you must update the login names to match the Windows names.

6. Start SQL management studio, expand the file vault database, expand tables, right-click Users table, select Edit Top 200 Rows. The current user names will show.
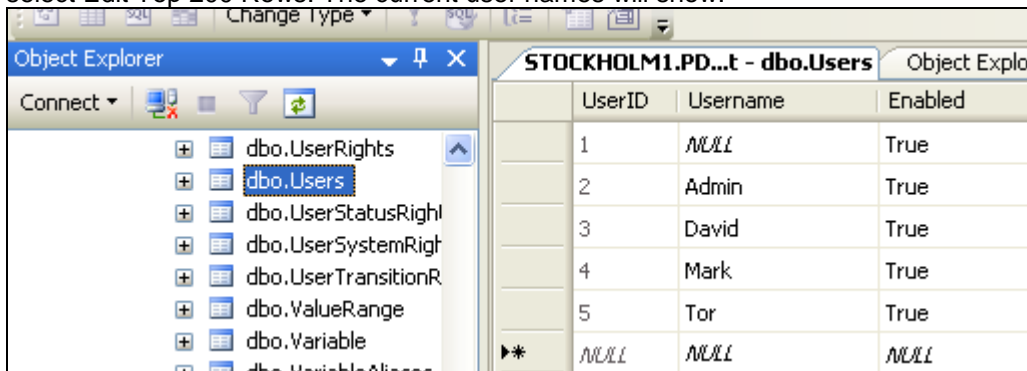
7. Update the user names to match the "new" Windows usernames in the "Username" column.

STOCKHOLM1.PD...t - dbo.Users	Object Explorer Details		
UserID	Username	Enabled	LoggedIn
1	NULL	True	False
2	Admin	True	False
3	David.Heywood	True	False
4	Mark.Pearson	True	False
5	Tor.Iveroth	True	False
▶*	NULL	NULL	NULL

- Make sure to not change the user entries called "Admin", "sa" or "<NULL>"
- Update the name to exactly match the Windows username.
- Make sure that you do not modify any other column values.
- Make sure that there are no duplicate names.

8. The windows login names should now be in effect in the vault. You may have to restart the administration tool to see the new names, then right-click the Users node and select "Validate logins" to check the names.

```
Users
    Admin
    David.Heywood
    Mark.Pearson
    Tor.Iveroth
    X2 Variables
```

If a name still show with a red plus it means that the archive server cannot find that user name in the login type.
- If using Windows Login type, check the archive configuration tool settings for the Windows login type setting and make sure the new/renamed user is part of the Windows login settings.
- If using Enterprise PDM login type, it is possible that the new/renamed user does not exist in the archive server registry yet. Double-click the user with the red plus icon and assign a new password. T
- Run the "validate logins" command again to validate the users after you have made changes.