



DIRECTORY MANAGER V1.2

Quick Install Guide

Directory Manager is an easy-to-use, customizable, Web-based utility that allows the administrator to delegate the ability to update user's information in the Active Directory to non-admin users such as the HR department or a receptionist.

This document is intended to provide you with a quick reference for getting Directory Manager installed.

Tips

Here are some tips and information that will make your work with Directory Manager easier and more trouble-free.

- All updates to the Active Directory are done using a service / proxy account, not via the currently logged on user's credentials.
 - Create a service/proxy account that has the permissions necessary to update all users.
 - The service/proxy account's password should not expire.
 - Members of Account Operators cannot update other operator or administrative users. This is a Windows security feature.
- Users are given permission to use Directory Manager by creating a **Directory Update Managers** group in Active Directory and putting the end users in this group. No permissions need to be assigned to this group.
- Almost all customization and configuration is performed in one of three XML files found in the c:\inetpub\wwwroot\directory
 - DirectorySettings.XML contains the field/attribute configuration such as which fields show up on the Edit interface, which fields are hidden, drop-down list values, etc...
 - AppSettings.XML allows you to customize the search options, window labels, error/help messages, and narrow the scope of a search to a single OU.
 - AddressSettings.XML allows you to specify an attribute such as Office name that, when selected, will automatically read the office address (street, city, state, postal/zip code, and country) and populate that for the user.
- Get yourself a good XML editor; that will make editing the XML files much more painless. We recommend Notepad++; a very good and free text editor. <http://notepad-plus.sourceforge.net>
- Always make backup copies of your XML files.



- Photo support requires that the NETWORK SERVICE be given "Modify" permissions to the c:\inetpub\wwwroot\directorymanager\photos folder.
- You can install the evaluation version and later run the Configuration utility to add a license key so that it no longer expires.

Prerequisites

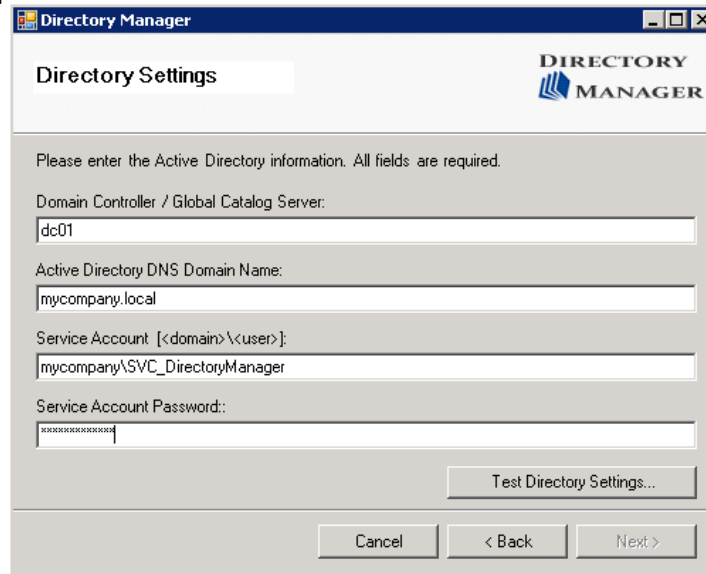
Make sure that your server meets all of the prerequisites and your installation will go much more smoothly.

- Server requirements
 - Windows Server 2003 with SP1 or later
 - IIS Web service installed
 - Microsoft .NET Framework v2.0 installed
 - Server must be a member of the domain/forest
 - In IIS Manager under Web Service Extensions, make sure that ASP.NET v2.0.50272 is visible and Allowed
- Create a service/proxy account that has permissions to update user accounts.
- Have a domain user account that is also a member of the IIS Server's local Administrators group to do the installation
- Create a **Directory Update Managers** group that will hold the authorized Directory Update users.
- Download the latest version of the software from our Web site.

Installation

Installation is usually simple and quick though the software will be installed with the default XML templates and you will need to customize these for your organization.

1. Run the **DirectoryManager.MSI** installer
2. You can take most of the defaults for the installer including the default virtual directory name (**/DirectoryManager**) and putting the site on to the Default Web Site.
3. On the Directory Settings screen, enter the domain controller name, the domain name, the service account information, and the service account password.



4. Click the Test Directory Settings button and click Next
5. Enter the organization name and the license key (or check evaluation version)
6. Finish the installation
7. If on a domain controller, give the NETWORK SERVICE account "Modify" permissions to the folder:
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files
8. If using the Photo feature, give the NETWORK SERVICE account "Modify" permissions to the folder:
c:\inetpub\wwwroot\DirectoryManager\Photos
9. Customize the XML files to suit your organization.



Customization Quick Reference

Customizing the Directory Manager interface for your specific requirements is reasonably simple once you have taken a look at the XML files that store the configuration and if you get yourself a good XML editor. The XML files are all found in the following folder:

C:\inetpub\wwwroot\DirectoryManager\Settings

Each attribute or field on the user interface has some of the same basic options:

- Each field label can be changed
- Each field type can be text, dropdown, or combo
- Each field can be hidden / unhidden
- Each field can be made read only or editable
- Each field can have a default value
- Each field can have a validation format assigned to it
- Each field can have example text

Below is an example of the Organization section and two fields (company and office.) This will give you an idea of some of the types of customization that can be done.

```
44 <!-- ORGANIZATION SECTION -->
45 <organization label="Organization" visible="yes">
46 <company label="Company" type="dropdown" visible="no" editable="yes" required="no"
validationFormat="" defaultValue="" example="">
47 <value>Ithicos Solutions</value>
48 <value>Somorita Surfboards</value>
49 <value>Volcano Surfboards & Smoothies Shop</value>
50 <value>Bob's Boogie Boards</value>
51 </company>
52 <office label="Office" type="text" visible="no" editable="yes" required="no" validationFormat=""
defaultValue="" example=""></office>
```

The DirectorySettings.XML and AddressSettings.XML files CAN be interchanged with Directory Update. The AppSettings.XML file cannot be used with our other programs.