

# **PeoplePassword Administration and User Guide**

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# Welcome to PeoplePassword

Web Active Directory's PeoplePassword solution empowers your organization's users to take control of Windows password management. Your users can now recover their Windows passwords and unlock their Windows accounts without calling your help desk, making your valuable help desk staff available for other activities. PeoplePassword puts the power of Windows password and account management into the hands of those who need it most—your users!

## Benefits

PeoplePassword provides lots of benefits in your organization.

- Cuts costs in your IT organization by decreasing the number and frequency of help desk calls
- Empowers your users to quickly and easily recover their Windows password without spending lots of time on a support call
- Securely validates user identities to cut down on fraudulent imposters trying to impersonate another person on a help desk call
- Allows your help desk staff to assist users with recovery activities while requiring the help desk to verify each user's identity
- Increases the productivity of users in your organization by allowing them to quickly recover a password or unlock an account instead of losing time waiting on help desk personnel to assist them with the recovery process

## Getting Started

Web Active Directory constructed PeoplePassword from the ground up to make it easy for your users to enroll and recover passwords as well as to ease the burden of customizing your PeoplePassword configuration for your environment. Many of the activities are wizard-driven actions and walk you through the tasks you need to complete step by step.

Before diving right into PeoplePassword, take a few minutes to examine the following topics to familiarize yourself with PeoplePassword. This will help you get the most out of your PeoplePassword solution right from the start.

- Understand how the PeoplePassword components fit together for the whole solution
- Gain an understanding of the administrative activities you need to customize your PeoplePassword configuration
- Look at how easy it is to have your users enroll in PeoplePassword and then recover Windows passwords using PeoplePassword



# PeoplePassword Components

PeoplePassword includes four core components and two optional components, each of which may be installed separately and even distributed across multiple servers. These components give you ultimate flexibility to determine how you want to deploy and secure PeoplePassword in your environment. You can install all of these components except the Windows Loin Component using the PeoplePassword installer.

## Core Components

You must install all four core components to operate PeoplePassword.

### SQL Server Database

Stores configuration data for PeoplePassword, including the encrypted questions and answers for your users to use when recovering passwords or unlocking accounts.

### Administration Center Home

Allows authorized system administrators to configure PeoplePassword for your unique environment.

- **Configuration Center:** Customize PeoplePassword settings for your environment.
- **Help Desk Center:** Allow help desk personnel to assist users with Windows password recovery and account unlocks.
- **Reports Center:** View information about how your organization's users are employing PeoplePassword in recovery processes.

### Enrollment Center

Provides a web interface for your users to answer questions required to enroll in PeoplePassword.

### Recovery Center

Allows your users to unlock their Windows accounts and recover Windows passwords.

## Optional Components

You don't have to install the optional components to run PeoplePassword but you may want to use them if you would like to extend the utility of PeoplePassword.

### Enrollment Status Web Service

Returns the status of whether a user is properly enrolled in PeoplePassword.

### Windows Loin Component

Provides an extra option on the Windows logon screen to allow users to access PeoplePassword without needing to log on to a computer with their locked or forgotten account credentials. The Windows Logon component has its own installer file and is not part of the regular PeoplePassword installer.





# Optional Components

## Enrollment Web Service

PeoplePassword includes an optional web service that allows you to check the enrollment status of a user in your organization. You can use this service, for example, in a Windows logon script to check if a user is enrolled and route the user to the PeoplePassword Enrollment Center if the user is not enrolled.

## Using the Enrollment Web Service

The Enrollment Web Service provides a method called `IsUserEnrolled()` that you can call to determine if a user is enrolled in PeoplePassword. The `IsUserEnrolled()` method takes a string argument that is a search filter for finding the user in Active Directory. Most often, this search filter uses the Windows account name and is formed in the following manner:

```
sAMAccountName=<YourAccountName>
```

The web service returns a boolean value of true or false indicating whether the user has a current valid enrollment in PeoplePassword. You can view a sample of VBScript code that you might use from your Windows logon script to check enrollment status and then perform an action. This sample file, `VerifyCurrentUserEnrolled.vbs`, is available in the `WebServices` directory where you installed PeoplePassword, typically `C:\Program Files\WebActiveDirectory\PeoplePassword`.

## Windows Logon Component

Web Active Directory partners with a leading technology provider of Windows logon solutions to give you an intuitive way to allow your users to access the PeoplePassword Recovery Center. When users are locked out of their Windows computer, they can use an integrated Windows 2000/XP component (GINA) or Vista component (Credentials Provider) to recover their Windows password or unlock their Windows account. This component adds a button to the Windows logon screen that takes the user to the PeoplePassword Recovery Center when clicked. And the user doesn't even have to log in to Windows!

## Using PRIME Self Password Reset Manager

PRIME Self Password Reset Manager adds a `Forgot Password` button to the Windows logon screen.

- Click `Forgot Password` to launch the `Forgot Password` command set in the `PRIME Self Password Reset Manager MSI`
- Enter a `User name` and `Password` to log on

## Controlling the Recovery Center Link on User Computers

You have two options to customize the Recovery Center URL link that is used to load when a user clicks `Forgot Password`. You can use Windows Group Policy to control the URL or you can customize the MSI installer package before deploying the Windows Logon Component to your organization's PCs.

### Using Group Policy

You can control the URL of the Recovery Center on PCs where you deploy the Windows Logon Component with PeoplePassword's Self Password Reset Manager through Group Policy. Contact Web Active Directory support for the `.adm` and `.admx` resource files you need to use to import the appropriate settings into your environment.

### Customizing the MSI Package

If you choose not to use Group Policy for customizing your environment, you can also customize the MSI package using an MSI editor prior to deployment in your environment.

1. To set appropriate URL information you must have an MSI Editor. We recommend using the Microsoft Orca editor.
2. After installing an MSI editor like Orca, right click the MSI file and click Edit with Orca or use the context menu item appropriate to your MSI editing tool.
3. Set the ForgotCmd Registry value in the MSI database to the URL for the PeoplePassword Recovery Center.
4. Save the MSI package changes and test the installer on a test PC to ensure it sets the Recovery Center URL properly. You will know it's correct when you click the Forgot Password button and you go to the PeoplePassword Recovery Center web application.

# Administration and Configuration

## Administration Center Home

The PeoplePassword Administration Center Home centralizes administrative activities for your PeoplePassword installation. The Administration Center Home includes three Administration Centers: the Configuration Center, Help Desk Center and Reports Center. You can configure distinct security for each of these Centers to allow only authorized personnel to access the functionality they need.

## Administration Centers

The three Administration Centers in PeoplePassword allow you to configure the solution as well as gather information about PeoplePassword's usage by your organization's users.

### Configuration Center

The Configuration Center allows authorized system administrators to configure PeoplePassword to meet your organization's needs. Use the Configuration Center to configure:

- **Profiles:** Segment different groups of users to customize questions and answering requirements for each profile.
- **Questions:** Add your own questions or modify existing ones. You can even have your users write their own custom questions.
- **Question Lists:** Allow users to answer a few questions from a larger list of candidate questions.
- **Notifications:** Customize how application events are emailed and logged.
- **Global Settings:** Configure settings that apply across PeoplePassword.
- **LDAP Configuration:** Create LDAP configurations to connect to Active Directory for finding users, recovering passwords and unlocking accounts.
- **Localization:** Create localized Help Desk Center content for each language in your environment.

You can learn how to secure the Configuration Center in this topic.

### Help Desk Center

The Help Desk Center empowers authorized help desk users to assist your organization's users to recover their Windows passwords and unlock their Windows account. PeoplePassword enforces security for these operations by requiring your help desk staff to ask users to answer enrollment questions to verify their identity. This cuts down on identity fraud and allows your help desk to assist users who do not have access to the PeoplePassword Recover Center.

In addition to assisting users with Windows password reset and account unlock operations, help desk personnel can use the Help Desk Center to unlock user accounts that have been locked out of the PeoplePassword application.

You can learn how to secure the Help Desk Center in this topic.

### Reports Center

The Reports Center gives authorized users access to reports that show the return on your organization's PeoplePassword investment. View the number of users enrolled in PeoplePassword, the number of times that PeoplePassword has been used to recover or change a password, or to unlock an account. Check out whose enrollments have expired and who is locked out of the PeoplePassword application.

You can learn how to secure the Reports Center in this topic.

## Accessing the Center Home Pages

The default PeoplePassword installation creates new IIS web sites for each Center: the Administration Center, Enrollment Center and Recovery Center. PeoplePassword uses unique port numbers to allow you to access these Centers and you may also access them from the Programs menu on the Windows server on which the Centers are installed.

- **Administration Center (port 8300):** `http://<YourServerName>:8300/`
- **Enrollment Center (port 8301):** `http://<YourServerName>:8301/`
- **Recovery Center (port 8302):** `http://<YourServerName>:8302/`

## Securing the Administration Centers

By default, all Administration Centers are available to everyone. Check out the following topics to secure each Administration Center so that only authorized users have access.

- Configuration Center
- Help Desk Center
- Reports Center

## Configuration Center

### Configuration Center

The PeoplePassword Configuration Center provides a simple, secure way to customize PeoplePassword settings for your organization's needs. Using the Configuration Center, you can configure how users enroll in PeoplePassword and how they recover passwords as well as a host of other options about PeoplePassword.

The information in this help topic will help you set up security to ensure that only the right people may access the Configuration Center. This topic also contains a brief overview of each Configuration Center page and its purpose. You can get more detailed information about each page in the individual page topics.

### Securing the Configuration Center

You can secure the PeoplePassword Configuration Center to only allow authorized system administrators to access it. This ensures that only the individuals you want to make configuration changes can access PeoplePassword to change configuration settings.

#### To secure the Configuration Center:

1. Navigate to the PeoplePassword installation directory on the server on which the PeoplePassword Administration Center is installed. The default installation location is `C:\Program Files\WebActiveDirectory\PeoplePassword\AdminCenter`.
2. Using a text or XML editor, open the `Web.config` file in the PeoplePassword Administration Center root directory.
3. Locate the `<location path="Admin">` element near the end of the configuration file.
4. Modify the `<allow roles="Everyone" />` element to change the roles attribute to include the Windows groups whose members you want to be able to access the PeoplePassword Configuration Center. You may put multiple groups into the roles attribute using the semicolon character (";") as a separator for each group.

*Example:* <allow roles="YOURDOMAIN\Domain Admins;YOURDOMAIN\Information Technology Administrators" />

5. Save the changes to the Web.config file.
6. Test the security by accessing the Configuration Center as a user in an authorized group as well as accessing it as an unauthorized user. You might have to have an unauthorized user test this functionality for you.

## Configuration Center Pages

The Configuration Center contains pages that allow you to customize many aspects of your PeoplePassword solution.

### Profiles

Configure the profiles that control how different groups of users can use PeoplePassword. You can create a profile for each custom set of questions and answers you need for different user groups.

Get more information about profiles.

### Questions

Create, edit and delete questions used by PeoplePassword to verify a user's identity during a Windows password recovery or account unlock operation. PeoplePassword includes questions that you write as an administrator as well as custom user-created questions that users write themselves.

Get more information about questions.

### Question Lists

Create, edit and delete lists of questions that allow a user to choose a few questions to answer from a larger set of questions.

Get more information about question lists.

### Notifications

Control how notifications originating from application events should be routed to email recipients and logged in the server event log.

Get more information about notifications.

### Global Settings

Set values for parameters used to configure global PeoplePassword settings that apply across PeoplePassword.

Get more information about global settings.

### LDAP Configuration

Configure Active Directory parameters for searching for users in the Help Desk and Recovery Centers and for groups in the Configuration Center. The LDAP configurations are also used to locate groups for the Profile wizard as well as to actually reset Windows passwords and unlock Windows accounts.

Get more information about LDAP configuration.

### Localization

Customize the Help Desk Center content for each language in your environment.

Get more information about localization.

## Profiles

Profiles allow you to segment different groups of users in your organization so you can highly customize the questions each profile members sees and must answer to enroll in PeoplePassword. You can create a profile for each custom set of questions and answers to enforce the security you need for different user groups.

### Profiles Home Page

The Profiles home page shows you all the profiles configured for PeoplePassword. At a glance, you can see the profile names and Windows groups in each profile. In addition, you can view the Permissions available to profile members.

Because a user can be a member of multiple profiles because user's can be members of multiple Windows groups, PeoplePassword uses the concept of a profile priority to determine which profile to employ when a user enrolls. The Priority arrow allows you to move a profile up and down in the list and higher priority profiles are determined by being nearer to the top of the Profiles list.

**Important Note:** The default PeoplePassword configuration uses the Default user profile for everyone.

### Profile Information

You can easily view detailed profile information by rolling your mouse cursor over the Profile Information column and causing a pop-up window to show that displays more information about the profile. You can even move your mouse cursor into the pop-up window to access more information!

Profile information that shows in the pop-up window includes the following:

- **PeoplePassword lockout policy:** Shows the number of failed logon attempts available to a user before being locked out of using the PeoplePassword Recovery Center. Logon attempts are tracked within the specified time period and a user fails a logon attempt when she fails to answer her questions correctly. The lockout policy also shows the amount of time to wait until the PeoplePassword account is automatically unlocked and allows the user to attempt to use the Recovery Center again.
- **Profile Enrollment Expiration:** PeoplePassword uses the concept of enrollment expiration to determine how long an enrollment is valid. This concept allows you to force a user to enroll again in PeoplePassword once the enrollment expires. Set this value when you need to change a profile, for example, to add or change questions, and you want to ensure your users are enrolled with an updated profile.
- **Questions are available for the Help Desk to use:** Indicates if an authorized Help Desk Center user can view the question text when assisting users who are members of this profile.
- **Answers are visible to the Help Desk:** Indicates if an authorized Help Desk Center user can view the answer text when assisting users who are members of this profile.
- **Required Questions:** Shows the list of required questions that profile members must answer.
- **Custom Questions:** Shows the list of custom questions for which profile members must write a question as well as the answer.
- **Question Lists:** Shows the question lists associated with this profile and the number of questions in each list that users in the profile must answer

### Add/Edit Profile Wizard

This wizard allows you to create a new profile or modify an existing profile.

## Profile Wizard Pages

The Profile wizard pages allow you to easily create or modify a profile.

### Profile Information Page

Enter profile information to configure basic information about the profile. This information includes how to lock a user out of PeoplePassword as well as how to expire a profile.

- **Profile name:** Name of the profile
- **Number of failed logon attempts before a user is locked out:** Maximum number of incorrectly-answered recovery attempts through the PeoplePassword Recovery Center. This value is judged within the time frame specified by the *Time between first and last failed logon attempt* value
- **Time between first and last failed login attempt:** Time frame in which the *Number of failed login attempts before a user is locked out* is judged
- **Time before an account is automatically unlocked:** Amount of time that must elapse from the moment a user is locked out and when the user's account is automatically unlocked. This value has no bearing on the Windows account lockout status and only indicates whether a user can use the PeoplePassword Recovery Center to reset a Windows password or unlock a Windows account
- **Days until a user's enrollment expires:** Number of days from successful enrollment that a user's enrollment is valid. This value allows you to force re-enrollment when making significant profile changes like adding new questions to a profile. Set this value to 0 (zero) to have no expiration time.

### Select Groups Page

Select Windows groups whose members are members of this profile. The Available Groups list is populated based upon the LDAP configuration associated with the ProfileWizardGroupSearch resource. See the Configuration Center LDAP Configuration topic for more information about configuring this.

- **Available Groups:** Candidate list of groups available to add to the profile
- **Included Groups:** Selected groups whose members will be associated with the profile

### Configure Permissions Page

Set the permissions available for profile members.

- **AllowAccountUnlock:** Members can have their Windows account unlocked
- **AllowChangePassword:** Members can have their Windows password changed
- **AllowResetPassword:** Members can have their Windows password reset

### Help Desk Options Page

Configure the options available for Help Desk Center users when managing members of this profile.

- **Questions are available for the Help Desk to use:** Indicates if a Help Desk Center user may view the questions that profile members used to enroll
- **Answers are visible to the Help Desk:** Indicates if a Help Desk Center user may view the answers that profile members used to enroll

- **Force the user to change his or her password after a Help Desk reset:** Indicates whether profile members must reset their Windows password when first logging into Windows after a Help Desk Center user assists them with a password reset
- **Allow Help Desk to override whether to force the user to change his or her password after a Help Desk reset:** Indicates if a Help Desk Center user may override forcing a password reset when assisting a user

#### Recovery Center Options Page

Set options for Recovery Center users.

- **Force the user to change his or her password after a Recovery Center reset:** Indicates whether profile members must reset their Windows password when first logging into Windows after using the Recovery Center for a password reset operation

#### Select Questions Page

Select the required and custom questions for this profile. Questions selected on this page *must* be answered by profile members when enrolling in PeoplePassword using the Enrollment Center. Using custom question here is a great idea and allows the user to write her own question as well as answer.

You should only associate required questions with a profile when all your organization's users will be able to answer the question. For example, you might use the "What is your employee ID" as a required question associated with a profile as long as all employees have an ID, know their ID, and keep their ID secret from other employees.

#### Select Question Lists

For each question list that you want to associate with this profile, set the number of Answers Required for each question list. If you leave the Answers Required value blank for a question list, the question list will not be associated with the profile.

#### Finished

Verify that the information you have entered is correct and then finish the wizard to save the profile.

## Questions

Questions allow you to customize the questions users answer when they enroll in PeoplePassword. You can create two types of questions.

- **Required Questions:** Administrators write the text for these questions and include these questions in question lists or as required questions in a profile
- **Custom Questions:** User write the question and answer for these questions. You can associate a profile with a custom question but you cannot include a custom question in a question list.

#### Questions Home Page

The Questions home page shows you all the required and custom questions configured for PeoplePassword. At a glance, you can see the custom question description and question text for each required question. You can view more detailed information about each question by rolling your mouse cursor over the custom question description or required question text.

You can associate a custom question with one or more profiles but you cannot associate a custom question with a question list because there is no guarantee that a user will select to use a custom question from the list during enrollment. You can associate a question with both a profile and a question list.



## Add/Edit Custom Question Wizard

This wizard allows you to create a new custom question or modify an existing question.

### Custom Question Wizard Pages

The Custom Question wizard pages allow you to easily create or modify a custom question.

#### Question Information Page

Enter information about the custom question.

- **Custom Question Description:** A description of the custom question. This value is not displayed to the user and merely allows administrators to recognize the custom question with which they are working. You can enter multiple values here, one for each country or region you're using for localization.
- **Minimum response length:** The minimum number of characters a user must enter during enrollment to ensure a valid answer.

#### Select Profiles Page

Select the profiles that you want to associate with this custom question.

#### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the custom question.

## Add/Edit Required Question Wizard

This wizard allows you to create a new required question or modify an existing question.

### Required Question Wizard Pages

The Required Question wizard pages allow you to easily create or modify a required question.

#### Question Information Page

Enter information about the custom question.

- **Question Text:** The text of the question. This value is displayed to the user in the Enrollment and Recovery Centers. You can enter multiple values here, one for each country or region you're using for localization.
- **Minimum response length:** The minimum number of characters a user must enter during enrollment to ensure a valid answer.

#### Select Profiles Page

Select the profiles that you want to associate with this question. Profiles associated with a required question force the enrolling user to answer the question. You should only associate questions with profiles when all your organization's users will be able to answer the question. For example, you might use the "What is your employee ID" as a required question associated with a profile as long as all employees have an ID, know their ID, and keep their ID secret from other employees.

#### Select Question Lists Page

Select the question lists that you want to associate with this question.

### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the required question.

## Question Lists

Question lists allow you to provide a list of questions to answer from a larger set of questions for enrolling users in PeoplePassword. You can create a question list for each set of questions you would like and specify the number of answers required for each list. You may connect a question list to multiple profiles and you can even change the number of answers required for each profile!

**Note:** You must first create questions to use in a question list. See the Configuration Center Questions topic for more information about creating questions.

### Question Lists Home Page

The Question Lists home page shows you all the question lists configured for PeoplePassword. At a glance, you can see the question list names and you can view more detailed information about each question list by rolling your mouse cursor over the name. You can associate a question list with one or more profiles and you can set a custom number of answer required for each profile associated with a question list.

### Add/Edit Question List Wizard

This wizard allows you to create a new question list or modify an existing question list.

#### Question List Wizard Pages

The Question List wizard pages allow you to easily create or modify a question list.

#### Question List Information Page

Enter the name of the question list.

- **List name:** Name of the question list. This value is not displayed to the user and merely allows administrators to recognize the list with which they are working.

#### Select Questions Page

Select the questions that you want to use in this question list. You should select a fairly large number of questions to use as a candidate set.

#### Select Profile Page

For each profile that you want to associate with this question list, set the number of Answers Required for each profile. If you leave the Answers Required value blank for a profile, the profile will not be associated with the question list.

### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the question list.

## Notifications

PeoplePassword provides a powerful capability to customize notifications and control how these notifications should be routed. You can send notifications, raised when certain events like password

resets and account unlocks occur in PeoplePassword, to either an email address or the PeoplePassword event log on the web server.

## Notifications Home Page

The Notifications home page shows you the events and related notifications configured for PeoplePassword. At a glance, you can see the available events and notifications tied to each event as well as the custom variables used by the notifications. As you roll your mouse cursor over the email and event log notifications for each event, you can see more detail about the notifications.

PeoplePassword allows you to use a combination of system variables, custom variables that you create, and static text to configure notifications. You may have zero, one or many notifications for each event. Notifications can also be tied to a profile so that certain profiles may trigger special notifications for an event while other profiles have a smaller set of notifications.

You may click on an individual event to drill down and view the notifications for only that event. This makes it easy to add and edit notifications for a particular event.

## System Notification Variables

PeoplePassword provides several pre-defined system notification variables for you to use in your notifications. You should surround your variable names using percent characters (%) to indicate that you want to use a variable in a notification.

**Example:** The user's name is %AffectedUser.Name%.

### Host Variables

- **Host.IP:** IP address of the connecting authenticated user
- **Host.Browser:** Browser version of the connecting authenticated user
- **Host.ComputerName:** Computer name of the connecting authenticated user

### Affected User Variables

- **AffectedUser.Email:** Email address of the user being operated on by PeoplePassword
- **AffectedUser.Name:** Name of the user being operated on by PeoplePassword
- **AffectedUser.Profile:** Current profile of the user being operated on by PeoplePassword
- **AffectedUser.EnrollmentDate:** Enrollment date of the user being operated on by PeoplePassword
- **AffectedUser.EnrollmentExpiration:** Enrollment expiration date of the user being operated on by PeoplePassword

### Affected User Variables

- **AuthenticatedUser.Email:** Email address of the authenticated user who is working with PeoplePassword
- **AuthenticatedUser.Name:** User name of the authenticated user who is working with PeoplePassword

### Event Variables

- **Event.Name:** Name of the event raised to cause the notification

- **Event.Time:** Time of the event raised to cause the notification

#### Product Variables

- **Product.Name:** Name of the PeoplePassword product

### Custom Notification Variables

You can create your own custom notification variables to use in your notification messages. Each custom notification variable includes a name and a value and you reference a custom notification variable by name in the same way that you reference system variables, by surrounding the custom notification variable name with the percent symbol (%).

**Example:** My custom notification variable name is %MyCustomVariable.Name%.

PeoplePassword includes four default custom notification variables and you should customize at least the email addresses before using the system. Default notification messages use these values to send messages to the event log and email addresses.

- **Administrator.Email:** The email address to use for email notifications routed to your administrator. This can be any valid SMTP address, including a distribution group.
- **HelpDesk.Email:** The email address to use for email notifications routed to your help desk. This can be any valid SMTP address, including a distribution group.
- **HelpDesk.Name:** The name of the Help Desk in your organization.
- **OperatingSystem.Name:** The name of the operating system in your environment, typically Windows.

### Add/Edit Custom Notification Variable Wizard

This wizard allows you to create a new custom notification variable or modify an existing variable.

#### Custom Notification Variable Wizard Pages

The Custom Notification Variable wizard pages allow you to easily create or modify a custom notification variable.

##### LDAP Configuration Information Page

Enter the custom notification variable information for this variable.

- **Variable Name:** Name of the custom notification variable. This name is used to reference this variable in notifications.
- **Variable Value:** Value for the variable

##### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the custom notification variable.

### Event Notifications

The Event Notifications list shows you all PeoplePassword events that you can use to send notifications. PeoplePassword contains two types of notifications and you can configure different properties about each notification.

- **Email Notification:** Sends an email message based upon the notification configuration

- **Event Log Notification:** Adds an entry to the server event log based upon the notification configuration

**Important Note:** You must set up an SMTP server for email notifications to work properly. Review the Configuration Center Global Settings topic for more information about setting an SMTP server for email notifications to use.

### Add/Edit Email Notification Wizard

This wizard allows you to create a new email notification or modify an existing notification.

#### Email Notification Wizard Pages

The Email Notification wizard pages allow you to easily create or modify an email notification.

##### Email Notification Information Page

Enter the email notification information for this notification.

- **To address:** Destination email address for the notification. You can put static addresses or use variables (surrounded by the %% characters) and separate multiple addresses using the semicolon (;) character.
- **From address:** Source email address for the notification. You can put static addresses or use variables (surrounded by the %% characters) and separate multiple addresses using the semicolon (;) character.
- **Subject:** Subject line of the email notification
- **Message body:** Text of the email message. You can use variables, surrounded by the %% characters, in your message as well as static text.

##### Select Profiles Page

Tie the profiles that you want to use with this notification on this page by checking each profile to associate.

##### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the email notification.

### Add/Edit Event Log Notification Wizard

This wizard allows you to create a new event log notification or modify an existing notification.

#### Email Notification Wizard Pages

The Email Notification wizard pages allow you to easily create or modify an email notification.

##### Event Log Notification Information Page

Enter the email notification information for this notification.

- **Log level:** Type of event to add in the event log
- **Message:** Text of the event log message. You can use variables, surrounded by the %% characters, in your message as well as static text.

### Select Profiles Page

Tie the profiles that you want to use with this notification on this page by checking each profile to associate.

### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the event log notification.

## Global Settings

You can set values for parameters used to configure global PeoplePassword settings. The settings here include email server configuration as well as search settings for controlling how Help Desk and Recovery Center users can search for users.

### Global Settings Fields

The Global Settings section allows you to set an SMTP server.

- **SMTP server:** Designates the email server to use when sending outbound notifications. Look at the Configuration Center Notifications topic for more information about configuring email notifications.

### Help Desk Center Settings

The Help Desk Center Settings section allows you to configure settings that apply to the Help Desk Center Assist User wizard.

- **Prompt For User Name:** Shows or hides the Logon name text box on the Find Account page
- **Prompt For E-Mail:** Shows or hides the Email address text box on the Find Account page
- **Show Name in Results:** Shows or hides the user display name column on the Select Account page
- **Show E-Mail in Results:** Shows or hides the Email address column on the Select Account page

### Recovery Center Settings

The Recovery Center Settings section allows you to configure settings that apply to the Recovery Center wizard.

- **Enable Wildcard Searches:** Indicates whether to automatically append the LDAP wildcard character of "\*" to searches in the Recovery Center. This allows you to prevent open-ended searching for users in your Active Directory since it requires an exact match of the email or user name attributes.
- **Maximum Results:** Restricts the number of results allowed to show after executing a search. This decreases the load on your Active Directory server as well as allows you to prevent gathering of user data in scenarios where you publicly expose the Recovery Center. Set this value to 0 (zero) to show all search results.
- **Prompt For User Name:** Shows or hides the Company Login ID text box on the Find Your Account page
- **Prompt For E-Mail:** Shows or hides the Company Email Address text box on the Find Your Account page
- **Show Name in Results:** Shows or hides the user display name column on the Select Account page

- **Show E-Mail in Results:** Shows or hides the Email address column on the Select Account page

## LDAP Configuration

LDAP configurations allow you to specify how to connect to your Active Directory for performing searches and account modifications. PeoplePassword connects to Active Directory to search for users and groups as well as to reset and change passwords and unlock accounts. You can create multiple LDAP configurations for different components of PeoplePassword and you can even search multiple forests to find users and groups.

### LDAP Configuration Home Page

The LDAP Configuration home page shows you all the LDAP configurations available in PeoplePassword. At a glance, you can see the LDAP configuration description. You can roll over the description to view more information about an LDAP configuration.

**Important Note:** The LDAP configuration password is encrypted using a secret key and stored in the configuration database so that no one can view it using a database tool.

PeoplePassword includes two LDAP configurations in the default installation.

- **Default User Configuration:** Specifies LDAP information for searching for users in the Enrollment, Help Desk, Recovery and Reports Centers
- **Default Group Configuration:** Specifies LDAP information for searching for groups in the Configuration Center Add/Edit Profile wizard

### Add/Edit LDAP Configuration Wizard

This wizard allows you to create a new LDAP configuration or modify an existing configuration.

#### LDAP Configuration Wizard Pages

The LDAP Configuration wizard pages allow you to easily create or modify an LDAP configuration.

##### LDAP Configuration Information Page

Enter the LDAP configuration information necessary to connect to Active Directory for this configuration. All data except the description is optional.

- **Description:** LDAP configuration description
- **Bind path:** Bind path (LDAP or GC provider, typically) to the Active Directory bind object
- **Filter:** LDAP filter to use for searching. This filter is ANDed with any other search filters provided from the user interface.
- **User Name:** Fully-qualified Windows account name, in either NETBIOS or UPN format, to use to bind to Active Directory. PeoplePassword will bind under the IIS application pool account, typically NETWORK SERVICE, if you leave this value blank.
- **Password:** The password for the user specified in User Name. This password is encrypted using a secret key and stored in the configuration database so that no one can view it using a database tool.

##### LDAP Configuration Resources Page

PeoplePassword includes a collection of LDAP configuration resources which you can use to connect to one or more LDAP configurations. This allows you fine granularity to configure which LDAP configurations apply to which resources. To associate a resource with multiple LDAP configurations, you merely need to create the LDAP configurations and associate them with the resource.

Move the resources you'd like to associate with this LDAP configuration from the Available Resources list box to the Included Resources list box. The resources below use LDAP configurations to search for users and groups as well as to update data.

**Note:** All resources except the ProfileWizardGroupSearch perform searches for user information.

- **EnrollmentCenter:** Search for the authenticated user information to determine which profile to use for displaying enrollment questions
- **HelpDeskSearch:** Search for users to assist through the Help Desk Center's Assist User Wizard
- **ProfileWizardGroupSearch:** Search for groups available to be added to a profile
- **RecoveryCenterSearch:** Search for users to answer questions in the Recovery Center
- **ReportCenterSearch:** Search for users to display in enrollment reports

#### Finish Page

Verify that the information you have entered is correct and then finish the wizard to save the LDAP configuration.

## Localization

You can configure localized languages for PeoplePassword to display based upon the user's local country. PeoplePassword displays an intuitive form to allow you to configure localization for each country and/or region you would like. You can only configure Help Desk Center localization using the Localization page in the Configuration Center.

### Localization Home Page

The Localization home page shows you the localization sets configured for PeoplePassword. At a glance, you can see the languages in each localization set. When you click on a language, the Help Desk edit option appears and you can click it to show the edit form to change the items in the localization set.

#### Adding a Localization Set

You can add new localization sets for different languages.

#### Editing a Localization Set

You can edit an existing localization set by choosing a language and then a localization set under that language.

## Help Desk Center

### Help Desk Center

The PeoplePassword Help Desk Center allows authorized users to reset Windows passwords and unlock Windows accounts for other users in your organization. PeoplePassword secures the process of resetting passwords and unlocking accounts by requiring help desk personnel to enter answers to questions that users completed when enrolling in PeoplePassword, thus verifying each user's identity before taking action.

The information in this help topic will help you set up security to ensure that only authorized help desk personnel may access the Help Desk Center. This topic also contains a brief overview of each Help Desk Center page and its purpose. You can get more detailed information about each page in the individual page topics.



## Securing the Help Desk Center

You can secure the PeoplePassword Help Desk Center to only allow authorized help desk staff to access it. This ensures that only the individuals you want to assist users with password recovery and account unlocks can access PeoplePassword to use the Help Desk Center.

### To secure the Help Desk Center:

1. Navigate to the PeoplePassword installation directory on the server on which the PeoplePassword Administration Center is installed. The default installation location is `C:\Program Files\WebActiveDirectory\PeoplePassword\AdminCenter`.
2. Using a text or XML editor, open the `Web.config` file in the PeoplePassword Administration Center root directory.
3. Locate the `<location path="HelpDesk">` element near the end of the configuration file.
4. Modify the `<allow roles="Everyone" />` element to change the roles attribute to include the Windows groups whose members you want to be able to access the PeoplePassword Help Desk Center. You may put multiple groups into the roles attribute using the semicolon character ("`;`") as a separator for each group.

*Example:* `<allow roles="YOURDOMAIN\Domain Admins;YOURDOMAIN\Information Technology Administrators" />`

5. Save the changes to the `Web.config` file.
6. Test the security by accessing the Help Desk Center as a user in an authorized group as well as accessing it as an unauthorized user. You might have to have an unauthorized user test this functionality for you.

## Help Desk Center Pages

The Help Desk Center contains pages that allow you to assist users with Windows password recovery and Windows account lockouts as well as to unlock users who are locked out of PeoplePassword itself.

### Assist User Wizard

The Assist User wizard allows help desk personnel to assist a user with a Windows password reset or account unlock.

Get more information about the Assist User wizard.

### Application Lockout Report

The Application Lockout report shows PeoplePassword user accounts that may not currently use the PeoplePassword Recovery Center. These accounts become locked out when too many failed attempts occur to answer questions for a user account through the Recovery Center.

Get more information about the Application Lockout report.

## Assist User Wizard

The Assist User wizard allows authorized users to locate a user account and reset a Windows password or unlock a Windows account. The wizard allows you to search for a user by email address or login ID, which is the user's Windows account name. Once you locate a user, you can select the action to take to assist the user. This wizard behaves very much like the Recovery Center wizard. The wizard appears by default when you access the Help Desk Center.

Help desk personnel have several actions available through the Help Desk Center. Some actions may not be available depending on the help desk user's profile configuration. Available actions may include:

- Resetting a user's Windows password.

- Unlocking a user's Windows account. This option will only be available if the user's Windows account is currently locked out.
- Unlocking the user's PeoplePassword account to allow Recovery Center access. This option is only available if the account has had too many incorrect attempts to answer questions in the Recovery Console and has been locked out from using PeoplePassword.

### Wizard Configuration Resources

- See the Configuration Center Profiles topic for more information about configuring Help Desk Center actions for each profile, including configuring PeoplePassword account lockout policies.
- See the Configuration Center Global Settings topic for more information about setting Help Desk Center search options.

## Application Lockout Report

This report shows enrolled PeoplePassword user accounts that are currently locked out from using the PeoplePassword Recovery Center. These accounts become locked out when there are too many failed attempts to answer questions in the Recovery Center. Settings for automatic unlock and sensitivity to lockout are configured on a per-profile basis and you can get more information in the Configuration Center Profiles topic.

## Reports Center

### Reports Center

The PeoplePassword Reports Center provides authorized users with operational data about how your organization's users are using PeoplePassword. You can access reports that show enrollment numbers and frequency of use to determine the return on your investment into PeoplePassword as well as the cost savings your organization is realizing by reducing help desk calls and increasing employee productivity.

The information in this help topic will help you set up security to ensure that only authorized users may access the Reports Center. This topic also contains a brief overview of each Reports Center page and its purpose. You can get more detailed information about each page in the individual page topics.

### Securing the Reports Center

You can secure the PeoplePassword Reports Center to only allow authorized system administrators to access it. This ensures that only the individuals you want to make configuration changes can access PeoplePassword to change configuration settings.

#### To secure the Reports Center:

1. Navigate to the PeoplePassword installation directory on the server on which the PeoplePassword Administration Center is installed. The default installation location is C:\Program Files\WebActiveDirectory\PeoplePassword\AdminCenter.
2. Using a text or XML editor, open the Web.config file in the PeoplePassword Administration Center root directory.
3. Locate the <location path="Reports"> element near the end of the configuration file.
4. Modify the <allow roles="Everyone" /> element to change the roles attribute to include the Windows groups whose members you want to be able to access the PeoplePassword Reports Center. You may put multiple groups into the roles attribute using the semicolon character (";") as a separator for each group.

*Example:* <allow roles="YOURDOMAIN\Domain Admins;YOURDOMAIN\Information Technology Administrators" />

5. Save the changes to the Web.config file.
6. Test the security by accessing the Reports Center as a user in an authorized group as well as accessing it as an unauthorized user. You might have to have an unauthorized user test this functionality for you.

## **Reports Center Pages**

The Reports Center contains a number of pages with reports to allow authorized employees to gather data about how your users are using PeoplePassword.

### **Recovered Passwords Report**

The Recovered Passwords report shows information about users in your organization who have used PeoplePassword to reset their Windows password.

### **Changed Passwords Report**

The Changed Passwords report shows information about users in your organization who have used PeoplePassword to change their Windows password.

### **AD Accounts Unlocked Report**

The AD Accounts Unlocked report shows information about users in your organization who have used PeoplePassword to unlock their Windows account.

### **Enrolled User Report**

The Enrolled Users report shows information about users in your organization who have properly completed PeoplePassword enrollment.

### **Users Not Enrolled Report**

The Users Not Enrolled report shows information about users in your organization who have not completed PeoplePassword enrollment.

### **Expired Enrollments Report**

The Expired Enrollments report shows information about users in your organization whose PeoplePassword enrollment period has expired.

### **Locked Out Users Report**

The Locked Out Users report shows information about users in your organization who are locked out of the PeoplePassword application.



# User Enrollment and Recovery

## PeoplePassword Enrollment Center

The PeoplePassword Enrollment Center allows users to enroll in PeoplePassword using a web browser. An intuitive wizard interface walks users through the enrollment process to ensure a quick and easy method to enroll.

### Enrollment Center Wizard

Enrollment Center users go through a two- to four-step process to enroll in PeoplePassword. The number of steps depends on each user's profile configuration.

#### Enrollment Center Wizard Pages

The Enrollment Center wizard pages allow users to easily and quickly enroll in PeoplePassword. Wizard pages may or may not show in the Enrollment Center wizard, depending on the user's profile configuration.

##### Answer Questions Page

The Answer Questions page shows as the first step if the profile has required questions associated with it. Users must answer all questions on the Answer Questions page. The length of each answer must satisfy the minimum number of characters required in the required question configuration.

##### Create Your Own Questions Page

The Create Your Own Questions page shows as the first or second step if the profile has custom questions associated with it. Users must create questions and answers for all custom questions on the Create Your Own Questions page. The length of each answer must satisfy the minimum number of characters required in the custom question configuration.

##### Choose Questions Page

The Choose Questions page shows as the first, second or third step if the profile has at least one question list associated with it. Users must choose to answer the number of questions specified in the profile for each question list. The length of each answer must satisfy the minimum number of characters required in the required question configuration.

**Important Note:** Users cannot answer required questions that appear in a question list. The wizard page will disable any required questions from being answered and display an explanation why the question is not available.

##### Complete Your Enrollment Page

The Complete Your Enrollment page shows as the last step of the Enrollment Center wizard. Users should verify that the information they have entered is correct and then finish the wizard to save the enrollment information.

## Installation

The PeoplePassword Enrollment Center can be installed as a separate component independent of other components like the Administration Center, Recovery Center, Database and Enrollment Web Service. This type of configuration allows you to use load-balanced web server installations as well as deployment of the Enrollment Center to separate internal and external web servers.

## IIS Settings

Your users can use the Enrollment Center via a web browser to enroll in PeoplePassword. The Enrollment Center uses IIS Windows integrated authentication to establish the user's identity. The questions the user must answer to enroll are determined based on the user's profile membership, which is in turn based on the user's Windows group membership. Look at the Configuration Center Profiles topic for more information about configuring profiles.

### Application URL

By default, you can access the PeoplePassword Enrollment Center using a URL like `http://<YourServerName>:8301/`. PeoplePassword uses port 8301 and you can change this if necessary for your environment.

You may also access the Enrollment Center on the web server where it is installed by using the Programs menu.

## PeoplePassword Recovery Center

The PeoplePassword Recovery Center allows users to easily reset or change their Windows password or unlock their account using a web browser. The intuitive wizard interface walks users through the recovery process to ensure a quick and pleasing experience.

**Important Note:** Recovery Center action availability depends on the profile configuration for a user. Some actions may not be available for certain profile members.

## Recovery Center Wizard

Recovery Center users complete a multi-step process to establish their identity and perform a recovery action in PeoplePassword. The number of steps might vary if the user's enrollment has expired.

### Recovery Center Wizard Pages

The Recovery Center wizard pages allow users to establish their identity and reset or change their Windows password or unlock their Windows account. Wizard pages may or may not show in the Enrollment Center wizard, depending on the user's profile configuration.

#### Find Your Account Page

The Find Your account page allows users to search for their account by email address or account name. The user's profile determines how they can search from this page.

#### Select Account Page

The Select Account page shows search results for the email address or account name entered in the Find Your Account page. The user's profile determines which data shows on this page. Users can select their account and continue once they find their account.

#### Select Action Page

The Select Action page allows users to choose from a set of available actions. The user's profile determines which actions are available on this page.

**Important Note:** The Unlock Account action is only available if the user's Windows account is currently locked.

#### Verify Identity Page

The Verify Identity page shows the questions the user completed when enrolling in PeoplePassword using the Enrollment Center. The user must correctly answer all questions on this page to move forward and complete the action. Answers are *not* case sensitive.

If the user incorrectly answers the questions too many times, as determined in the user's profile configuration, then the user will be locked out of the PeoplePassword Recovery Center for the period of time specified in the profile. Help Desk administrators can use the Help Desk Center to manually unlock a PeoplePassword user account before the automatic expiration. See the Application Lockout Report for more information about this procedure.

**Important Note:** This page does not show for Change Password actions because this action requires knowledge of the current password, which is sufficient for identity verification and thus does not require the answering of enrollment questions.

### Action Page

The Action page depends on the action selected in the Select Action page. This page allows the user to reset or change her password. Windows account unlock actions do not have an Action page because the user does not need to take any action at this point; merely verifying the user identity is sufficient and the unlock actually occurs automatically after the identity verification succeeds.

Once the action is completed, a status message displays and the user may then close the Recovery Center and browser.

## Installation

The PeoplePassword Recovery Center can be installed as a separate component independent of other components like the Administration Center, Enrollment Center, Database and Enrollment Web Service. This type of configuration allows you to use load-balanced web server installations as well as deployment of the Recovery Center to separate internal and external web servers.

## IIS Settings

Your users can use the Recovery Center via a web browser to perform recovery actions in PeoplePassword. The Recovery Center uses IIS anonymous authentication to allow any user into the web application. Once in, the Recovery Center wizard enforces verification of the user's identity by requiring the user to correctly answer enrollment questions.

### Application URL

By default, you can access the PeoplePassword Recovery Center using a URL like `http://<YourServerName>:8302/`. PeoplePassword uses port 8302 and you can change this if necessary for your environment.

You may also access the Recovery Center on the web server where it is installed by using the Programs menu.





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