PeopleMinder v2.2 Configuration Guide

Instructions to Configure PeopleMinder v2.2

Web Active Directory, LLC

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Overview

These configuration notes provide direction on configuring PeopleMinder for your environment. At a minimum, you must ensure to create the scheduled task and set up the email options before running PeopleMinder. Refer to the Import the Scheduled Task to Run PeopleMinder Each Day and Tweak Configuration Settings sections for more information.

Installation Support

Contact us using methods described here: https://webactivedirectory.com/support/ if you need assistance with issues that arise while installing or configuring PeopleMinder.

System Requirements

Please note the system requirements detailed below when installing PeopleMinder.

Requirement	Description
Windows Server 2016, Windows Server 2008 and 2008 R2, Windows Server 2012 and 2012 R2	Web, Standard, Enterprise or Datacenter Edition for Server 2008 or Foundation, Essentials, Standard or Datacenter Edition for Server 2012: Hosts PeopleMinder application.
Microsoft .NET Framework version 4.5.1	Application framework, you will be prompted to install this by installer if it's not already installed on your server.
Windows service account with permissions to run PeopleMinder, write to the file system and connect to Active Directory	Used by PeopleMinder to run the utility, write to the PeopleMinder log file and connect to Active Directory to search for users with expiring passwords. **Important Note** Your service account must have privileges to run a Windows scheduled task as well.
3 MB disk space	Stores physical files used to run PeopleMinder as well as configuration and log files

Post-Installation Tasks

Once you complete installation of PeopleMinder, perform the following tasks and you will be ready to run PeopleMinder on a scheduled basis to send email reminders to Windows users in your environment whose passwords are expiring.

Import the Scheduled Task to Run PeopleMinder Each Day

You need to import the scheduled task from the ScheduledTasks subdirectory of the PeopleMinder installation directory into your Task Scheduler and set the service account and schedule for running the task. This allows the scheduled task to run PeopleMinder on a daily basis to send out email reminders to

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users in your environment with expiring Windows passwords. You can also tweak other scheduled task settings if you need.

The *Web Active Directory PeopleMinder - Daily Run.xml* task works on Windows Server 2008 or later. You can use the Import Task option in the Task Scheduler to import the task. It's best to create a WebActiveDirectory folder in your Task Scheduler Library to separate PeopleMinder tasks from other tasks.

Tweak Configuration Settings in the XML Configuration File

Set the common configuration values for the options you want to customize before you begin using PeopleMinder. Refer to the PeopleMinder Configuration Values section for more information about setting these values. You can find the configuration file, PeopleMinder.config, in the PeopleMinder installation directory.

Focus on setting the following values first to configure PeopleMinder to send emails in your environment. You also might need to set up SSL and authentication credentials for the SMTP server and those values are documented in the Configuration Element Attribute Values (<Configuration />) section.

- **SMTP Server**: Set the SMTP server you want to use to relay email messages from PeopleMinder to users with Windows account passwords that will expire soon. Use the SmtpServer and SmtpPort attributes of the <Configuration /> element to set these values.
- **From Address**: Set the <FromAddress /> element in the message to an appropriate email address in your environment.

PeopleMinder Command Line Options

The main PeopleMinder executable, PeopleMinder.exe, resides in the PeopleMinder installation root directory typically at %Program Files%\WebActiveDirectory\PeopleMinder. You can pass a number of command line options to the PeopleMinder executable at runtime to customize the application behavior.

IMPORTANT NOTE

On Windows Server 2012 or later, when running PeopleMinder.exe, ensure you run the application as an administrator. When running from a command prompt, for example, right click on the "Command Prompt" program and choose *Run as administrator* to run PeopleMinder under an administrative security context.

PeopleMinder Command Line Values

The following command line parameters allow you to customize the runtime behavior of PeopleMinder. You can also get helpful information about the parameters by typing *PeopleMinder.exe /?* at the command line. This will show the parameters available for you to set when running PeopleMinder. Ensure you preface each parameter using a slash (/) character.

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Command Line Examples

The first example runs PeopleMinder using the configuration values in the PeopleMinder.config file, the application configuration file located in the PeopleMinder directory.

```
C:\Program Files\WebActiveDirectory\PeopleMinder> PeopleMinder.exe
```

The following example sends a test email to TestAddress@YourDomain.com using the configuration values from the PeopleMinder.config file.

```
C:\Program Files\WebActiveDirectory\PeopleMinder> PeopleMinder.exe /testemail
TestAddress@YourDomain.com
```

The following example shows the license registration page for PeopleMinder.

```
C:\Program Files\WebActiveDirectory\PeopleMinder> PeopleMinder.exe /register
```

PARAMETER	VALUES EXPLANATION
?, h, or help	Shows help information for using command line parameters with PeopleMinder.
register	Shows the license registration screen to allow you to register PeopleMinder. Using this parameter causes PeopleMinder to ignore all other parameters.
writeblankconfig	Writes a default configuration file with no values set. This allows you to begin with a new configuration file and then set values.
testemail	Sends a test email message to the address that follows the parameter.

PeopleMinder Configuration File

The PeopleMinder configuration file, PeopleMinder.config, contains all the configuration settings that PeopleMinder needs to run. You can make changes to the configuration file to customize PeopleMinder for your environment. This XML file contains configuration settings that customize settings such as which Active Directory containers are searched, how often messages are sent and the content of sent messages.

The configuration file contains a root node called <ConfigurationSet /> and this node can contain multiple <Configuration /> elements. You can have as many <Configuration /> elements as you need in the same configuration file. This allows you to highly customize PeopleMinder by specifying different

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messages for different OUs, customizing messages for the same sets of users depending on the number of days before their passwords expire, setting different reminder intervals, searching different bind paths, etc.

To create a new configuration, merely copy an existing <Configuration /> element—including the opening and closing <Configuration> and </Configuration> tags—and paste the element below existing <Configuration /> elements. PeopleMinder processes every <Configuration /> element in the configuration file in order from top to bottom and this allows you to highly customize the configuration sets to send out messages.

PeopleMinder Configuration Values

Use the configuration values in the PeopleMinder configuration file to customize how PeopleMinder works in your environment. Some values allow you to put in any text while other values require you to choose from a pre-determined set of options. You can even use full HTML markup in your message body!

Restricted Attribute Values

The following attributes only allow you to enter values from a finite set of options. Please ensure you enter the values exactly as specified in the list below or the configuration setting will be ignored or an application error will occur.

ATTRIBUTE	PERMISSIBLE VALUES
MessageMode	Send, Test
LoggingLevel	Info, Verbose
LoggingMode	Overwrite, Append
PasswordAgeUnit	Days, Minutes

ConfigurationSet Element Attribute Values (<ConfigurationSet />)

The <ConfigurationSet /> element contains several attributes that you can modify to change PeopleMinder's behavior. Note that these attributes apply to all <Configuration /> elements and you cannot change these values from one <Configuration /> element to another.

ATTRIBUTE	DESCRIPTION
LogFileName	Sets the file name for the log file that contains logging information when PeopleMinder runs. You can set this path as a relative path by only entering a file name and this will put the file into the same directory as PeopleMinder. You can also specify an absolute path with a full path name if you desire.
LoggingLevel	Sets the logging level threshold for logging errors during a run. You can set this value to Info or Verbose. The Info level logs less information than Verbose level. Info is the default value.
LoggingMode	Sets the logging mode for writing to the log file. You can set this value to Overwrite or Append. Overwrite clears all existing log file content and Append keeps existing log file content and adds new

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content during a run to the end of the file. Append is the default value.

Configuration Element Attribute Values (<Configuration />)

The <Configuration /> element contains attributes and elements that you can modify to change PeopleMinder's behavior. Note that the settings in a <Configuration /> element apply to only this configuration and do not affect other <Configuration /> elements.

ATTRIBUTE	DESCRIPTION
MaximumPasswordAge	Sets the number of time units (typically days and determined by the PasswordAgeUnit configuration value) before a password expires in your domain. This value should mirror the maximum password age value in your Active Directory domain's password policy but you can set it to a different value if you desire.
PasswordAgeUnit	Sets the unit of time for measuring password age. Valid values include Days and Minutes.
ActiveDirectoryBindPath	Sets the bind path to use when searching Active Directory for expiring accounts. If this value is not set, PeopleMinder searches all user accounts from the root of the domain in which the PeopleMinder server resides. A sample bind path would look like this: LDAP://OU=YOUROU,DC=webactivedirectory,DC=local
ActiveDirectoryUserName	Sets the name of the service account to use to bind to Active Directory and perform queries to retrieve users with expiring passwords. PeopleMinder binds to Active Directory under the service account running the scheduled task if you do not set this value.
ActiveDirectoryPassword	Password for the service account set in the ActiveDirectoryUserName value. You can leave this value blank if you do not set an ActiveDirectoryUserName value.
ActiveDirectorySearchString	An LDAP search filter to use to restrict objects searched in the directory. For example, the "(&(objectcategory=person)(objectclass=user))" filter only searches user accounts and excludes contact objects. You can leave this value blank if you desire.
ActiveDirectoryUserEmailAttribute	The Active Directory email attribute to use to look up a user's email address, typically the "mail" attribute.
SmtpServer	The IP address or DNS name of the SMTP server off which to relay outbound email messages to users when passwords expire.
SmtpPort	The SMTP port on the SMTP server. This is typically port 25.

SmtpUseSsl	Indicates whether to connect to the SMTP server using SSL. Defaults to false.
SmtpUseDefaultCredentials	Indicates whether to use the credentials of the account running PeopleMinder when connecting to the SMTP server. Defaults to false.
SmtpUserDomain	The domain to use to authenticate to the SMTP server. This value is optional.
SmtpUserName	The Active Directory account username to use to authenticate to the SMTP server.
SmtpUserPassword	The password of the account to use to authenticate to the SMTP server.

Configuration Element Child Elements

The <Configuration /> element also contains child elements that you can modify.

CHILD ELEMENT	DESCRIPTION
Schedule	Sets the number of days to send a message before a user's Windows account password expires.
Message	Sets properties for the email message sent to users whose Windows account password is expiring.

Schedule Element (<Schedule />)

Use the <Schedule /> element to customize the email reminder schedule for a configuration. You may add as many values as you desire to the element to set the reminder schedule for the number of days before the password expires.

ATTRIBUTE	DESCRIPTION
DaysBeforeExpirationToSend	Sets the schedule for sending reminder messages. You can add as many values as you need here to set the schedule used to send a message before a user's password expires. **Note** You can use negative values to send reminders after a password expires and use 0 to send a reminder on the day the password expires.

Examples

This example configuration sends six reminder emails before a password expires, including sending emails 14, seven, five, three, two and one days before the password expires.

```
<Schedule DaysBeforeExpirationToSend="14,7,5,3,2,1" />
```

The following configuration sends seven reminder emails before and after a password expires, including sending emails 14, seven, three, two, one and zero days before the password expires as well as one, three and five days after it expires. Use negative values to send reminders after a password expires and use 0 to send a reminder on the day the password expires.

```
<Schedule DaysBeforeExpirationToSend="14,7,3,2,1,0,-1,-3,-5" />
```

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Message Element (<Message />)

The <Message /> element contains the configuration settings for the email message you want to send to users in this <Configuration /> element. It contains an attribute and several child elements.

ATTRIBUTE	DESCRIPTION
MessageMode	Sets the mode for sending messages. You can set this value to Send or Test. The Send mode actually sends an email message and the Test mode writes information about emails that it would send to the PeopleMinder log file. Test is the default value.

Message Element Child Elements

You can use the %NumberOfDays% variable to display information in the email message about the number of days remaining before a user's password expires. Ensure that you surround the variable name, NumberOfDays, with the % (percent) characters or the value will not be substituted in the message. You can use this variable in the subject or message body.

CHILD ELEMENT	DESCRIPTION
Subject	The text of the subject line.
FromAddress	The source address that originates the message. This value shows up in the user's email Inbox as the sender of the message.
MessageBody	The message body for the email. You can use full HTML markup here as long as the markup is within a <![CDATA[...]] section. You may also use a few variables in the message body to provide information to the message recipient. Each variable must be surrounded at the front and back with the % (percent) character as shown below. • %NumberOfDays% - The actual number of days before a user's Windows password is set to expire • %Mail% - The recipient's email address • %UserPrincipalName% - The recipient's user principal name • %SAMAccountName% - The recipient's SAM account name