
PeopleUpdate v4.4 Installation Guide

Instructions to Install
PeopleUpdate v4.4

Web Active Directory, LLC

PeopleUpdate v4.4 Installation Guide

Contents

| | |
|--|----|
| Overview | 3 |
| First-Time Installations..... | 3 |
| Upgrades of Previous Versions of PeopleSearch and PeopleUpdate | 3 |
| Installation Support..... | 3 |
| System Requirements | 3 |
| Installation Notes | 5 |
| PeopleUpdate Components..... | 5 |
| Upgrade Considerations | 6 |
| Upgrades from post-v3.4 SR #1 Releases | 6 |
| Upgrades from Releases Prior to v3.4 SR #1..... | 6 |
| Upgrade Tasks Prior to Installing the Latest PeopleUpdate Release..... | 7 |
| Post-Upgrade Tasks..... | 9 |
| Upgrade Notes | 11 |
| Changes from Previous Versions to v3.4 SR #1..... | 11 |
| Combined PeopleSearch and PeopleUpdate | 12 |
| Added New Licensing System | 12 |
| Changed IIS Configuration for PeopleUpdate Web Application | 12 |
| Updated PeopleSearch Authentication | 12 |
| Reconfigured File Locations | 13 |
| Changed File Names..... | 14 |
| Updated Resource File Location Pointers..... | 14 |
| Removed Registry Keys | 15 |
| Marked Files as Permanent | 15 |
| Installation Procedure..... | 15 |
| Important Upgrade Considerations | 15 |
| Installing PeopleUpdate..... | 16 |
| Running PeopleUpdate after Installation | 22 |
| Configuring PeopleUpdate..... | 23 |
| Registering PeopleUpdate with a Valid Serial Number | 23 |

PeopleUpdate v4.4 Installation Guide

Evaluation Serial Numbers..... 23

PeopleUpdate v4.4 Installation Guide

Overview

This guide includes instructions to help you install PeopleUpdate quickly and easily. Ensure that you meet all the System Requirements as detailed on page 3 before installing PeopleUpdate.

First-Time Installations

If you are installing PeopleUpdate for the first time, first review the System Requirements topic on page 3 and then go to the Installing PeopleUpdate section on page 16 and complete the quick process to install PeopleUpdate on your system.

Upgrades of Previous Versions of PeopleSearch and PeopleUpdate

If you are upgrading from a previous version of PeopleSearch or PeopleUpdate, first review the System Requirements topic on page 3 and then review the important Upgrade Considerations section on page 6 before upgrading. To preserve your current settings if you are upgrading from a release prior to this version you will need to copy at least your configuration file to a new location after you install PeopleUpdate.

NOTE

The v3.4 SR #1 and later releases of PeopleUpdate include significant changes to core components that require you to manually migrate files to the new PeopleUpdate application structure if you are upgrading from a release prior to v3.4 SR #1. Please ensure to review all upgrade-related notes prior to beginning the upgrade process.

Installation Support

Send an email to support@webactivedirectory.com if you need assistance with issues that arise while installing or configuring PeopleUpdate.

System Requirements

Please note the important system requirements detailed below before installing PeopleUpdate.

CRITICAL NOTE

You must ensure that you have properly installed both IIS and ASP.NET before installing PeoplePassword.

Windows Server 2008, 2012: IIS and ASP.NET Installation

For Windows Server 2008 and 2012, reference the IIS Requirement section in the table below. You can also check out the Web Active Directory Knowledge Base article to install the correct Windows Roles and Role Services for IIS 7 and 7.5: <http://www.webactivedirectory.com/support>, click on our knowledge base, then search for “server 2008”.

PeopleUpdate v4.4 Installation Guide

| Requirement | Description |
|---|--|
| Windows Server 2008 and 2008 R2, Windows Server 2012 and 2012 R2 | <p>Web, Standard, Enterprise or Datacenter Edition: Hosts PeopleUpdate application. Please ensure the server is not a domain controller and is a member server in a domain.</p> <p>Important Note Please ensure the server is not a domain controller and is only a member server in the domain.</p> |
| IIS 7 or later | <p>Hosts ASP.NET processes and web applications.</p> <p>Important Note for Windows Server 2008 and later You might need to set up IIS and ASP.NET on Windows Server 2008 to run .NET web applications. The default Windows Server 2008 installation does not include these components and the procedure below describes how to install the features.</p> <p>Install IIS and ASP.NET on Windows Server 2008 and 2008 R2</p> <ol style="list-style-type: none">1. Launch the Server Manager by choosing Start > Run and typing in CompMgmtLauncher.exe.2. In the left pane of Server Manager, select the node that represents the server that you are currently working on.3. In the right pane, expand the Roles Summary section and then click Add Roles. The Add Roles Wizard appears.4. Click Next. The wizard moves to the Select Server Roles step.5. Select the Web Server (IIS) check box and then click Next. The next wizard step that appears is information that guides you in the installation.6. Click Next. The wizard moves to the Role Services step. A list of available role services is displayed. If you click the name of a role, a short description of the role is displayed.7. Select the Application Development role service, and then select the ASP.NET check box. Note: You will be prompted with the related options that are also required for Web application development. Click Add Required Role Services.8. Select Windows Authentication under the Security role service.9. Click Next and verify the role service selections.10. Click Install to start the IIS and ASP.NET installation process.11. When the installation is complete, click Close. <p>For any questions regarding installing these components, please contact Web Active Directory support at support@webactivedirectory.com.</p> <p>Installing IIS on Windows Server 2008 http://learn.iis.net/page.aspx/29/install-iis-7-on-windows-server-2008-or-windows-server-2008-r2/</p> <p>Installing IIS 8 and 8.5 on Windows Server 2012 and 2012 R2</p> |

PeopleUpdate v4.4 Installation Guide

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|--|---|
| | <ul style="list-style-type: none">Server 2012 (IIS 8): http://www.iis.net/learn/get-started/whats-new-in-iis-8/installing-iis-8-on-windows-server-2012 Server 2012 R2 (IIS 8.5): http://www.iis.net/learn/install/installing-iis-85/installing-iis-85-on-windows-server-2012-r2 |
| Microsoft .NET Framework version 4.5.1 | Runs .NET applications. You must install at least version 4.5.1 of the .NET Framework. You can download the framework from Microsoft's download site at https://www.microsoft.com/en-us/download/details.aspx?id=40779 . |
| Windows service account with permissions to update attribute data in Active Directory | Used by PeopleUpdate to update data in Active Directory. Refer to Step 10 of the Installing PeopleUpdate section on page 19 for more information about how to configure your service account |
| 15 MB disk space | Stores physical files used to run PeopleUpdate |

NOTE

PeopleUpdate installs its web application on port 8100 of the web server on which you choose to install the PeopleUpdate solution. You can change the PeopleUpdate web application configuration after installation if you already have an application running on port 8100 on the web server.

Installation Notes

This section includes installation notes about PeopleUpdate, including information about the PeopleUpdate application components and important notes if you are upgrading from a previous version of PeopleSearch or PeopleUpdate.

PeopleUpdate Components

The PeopleUpdate solution includes an ASP.NET web application, a configuration component that stores configuration information about your PeopleUpdate environment and log files for troubleshooting. PeopleUpdate stores its configuration data in an XML file that makes it easy to back up your installation, which is especially useful in disaster recovery (DR) scenarios.

| Component | Description |
|---|--|
| Administration Console Web Application | Allows you to customize the PeopleUpdate configuration for your environment. The Administration Console is installed by default on port 8100 and you can access it using the <a href="http://<YourServerName>:8100/AdminPage.aspx">http://<YourServerName>:8100/AdminPage.aspx page. |
| Search Console Web Application | Allows end-users to search and update information in Active Directory using PeopleUpdate. The Search Console is installed on port 8100 and you can access it using <a href="http://<YourServerName>:8100/Default.aspx">http://<YourServerName>:8100/Default.aspx page. |

PeopleUpdate v4.4 Installation Guide

| | |
|----------------------|--|
| File System | Contains directories and files necessary to run the PeopleUpdate solution. The directories include: <ul style="list-style-type: none">• Configuration: Stores configuration files and other resources to help customize your PeopleUpdate installation.• Logs: Contains error log and trace log files.• Web: Contains the ASP.NET web application files for PeopleUpdate. |
| Programs Menu | Provides shortcuts to launch the PeopleUpdate Administration and Search Centers from the web server where you installed PeopleUpdate. |

Upgrade Considerations

Depending on the PeopleUpdate version from which you are upgrading, you may need to take a couple of different paths. Please refer to the appropriate topics for your upgrade path.

Upgrades from versions prior to v4.x

Web Active Directory made changes to update PeopleUpdate from a 32-bit application to a 64-bit application with the release of v4.0. These changes cause PeopleUpdate to install into a different directory (64 bit Program Files directory rather than 32) than previous versions and you need to follow the guidelines below to properly migrate to the new version. If you're moving from v3.4 SR#1 or later to v4.x there isn't a significant change in the format or contents of the files described below.

Upgrades from post-v3.4 SR #1 Releases

The upgrade path from releases included and after v3.4 SR #1 is very straightforward and no special considerations are needed. All you need to do is run the installer file as detailed in the Installing PeopleUpdate section on page 16.

Upgrades from Releases Prior to v3.4 SR #1

The upgrade process for upgrades from releases prior to PeopleUpdate v3.4 SR #1 allows you to install the latest PeopleUpdate release alongside your current PeopleUpdate installation. This scenario gives you an advantage when upgrading because it allows you to run both your previous and current PeopleUpdate releases at the same time since both application instances run independently. You can then migrate and upgrade files from your previous version to the current version at your convenience and ensure everything works properly in the new release of PeopleUpdate before removing the previous version.

Note the following upgrade tasks to help you perform your upgrade in the smoothest manner possible. You may contact Web Active Directory Support at +1 800.747.3565 extension 200 or send an email to support@webactivedirectory.com if you would like upgrade assistance or have a question.

PeopleUpdate v4.4 Installation Guide

NOTE

Before upgrading from a version of PeopleSearch or PeopleUpdate prior to v3.4 SR #1, you may refer to the Changes from Previous Versions to v3.4 SR #1 section on page 11 for detailed information about the changes introduced in PeopleUpdate v3.4 Service Release #1. This section shows very detailed notes about the changes between versions. You may also jump straight to the upgrade tasks if you are comfortable with performing those tasks.

Upgrade Tasks Prior to Installing the Latest PeopleUpdate Release

Complete the following tasks prior to installing PeopleUpdate if you are upgrading from a release prior to v3.4 SR #1. Many of these tasks are for insurance purposes since the PeopleUpdate installer should not affect the current PeopleUpdate installation. Finishing these tasks will also help you become more familiar with the changes introduced in PeopleUpdate v3.4 SR #1 and later.

Note File Locations from the Registry Key

You may need to reference the file locations for the current PeopleUpdate configuration and error log file locations so you can back up these files before upgrading. You can find the locations in the web server system registry where PeopleUpdate is installed under the following keys. Refer to the proper subkey based upon if you have PeopleSearch or PeopleUpdate installed on your system.

NOTE

The TraceFilePath registry value is not used in either PeopleSearch or PeopleUpdate. You can ignore the value while noting file locations during this process because the actual trace file path location value used by PeopleSearch and PeopleUpdate is stored in the Web.config file.

| Product | Registry Key | Values |
|---------------------|---|--|
| PeopleUpdate | HKEY_LOCAL_MACHINE\SOFTWARE\WebActiveDirectory\PeopleUpdate | <ul style="list-style-type: none">• ConfigFilePath: Path to the PeopleUpdate configuration file.• ErrorFilePath: Path to the PeopleUpdate error log file.• TraceFilePath: Path to the PeopleUpdate trace log file. This value is not actually used in the application so it's not important to note its value. |
| PeopleSearch | HKEY_LOCAL_MACHINE\SOFTWARE\WebActiveDirectory\PeopleSearch | <ul style="list-style-type: none">• ConfigFilePath: Path to the PeopleUpdate configuration file.• ErrorFilePath: Path to the PeopleSearch error log file.• TraceFilePath: Path to the PeopleSearch trace log file. This value is not actually used in the application so it's not important to note its value. |

PeopleUpdate v4.4 Installation Guide

Back Up Current Files

You need to back up your current configuration files to ensure that you do not lose the investment of work you have put into your current PeopleUpdate application configuration. You can back up the following files to a directory outside of the PeopleUpdate web application directory and Program Files directory to ensure the files are not affected by upgrading to the new release of PeopleUpdate.

Current configuration files

Back up the following configuration files so you can migrate your current configuration settings to the new file structure in PeopleUpdate.

| Product(s) | File Path | Notes |
|--------------------------------------|--|---|
| PeopleSearch | <Program Files>\WADPSConfiguration.xml | Stores application configuration information for PeopleSearch. |
| PeopleUpdate | <Program Files>\WADPUConfiguration.xml | Stores application configuration information for PeopleUpdate. |
| PeopleSearch and PeopleUpdate | <IIS Application Root>\Web.config | Contains custom security information and other configuration data. You may need to update parts of this file if you are running PeopleSearch since the latest release uses Integrated Windows authentication in IIS as the default setting instead of Anonymous authentication. |

Log files

Back up the following log files to preserve the current content of those files. You do not need to back up these files if you want to start with empty files in your new PeopleUpdate installation.

| File Path | Notes |
|------------------------------|---|
| <Program Files>\WADError.log | Error information generated while PeopleUpdate is running. |
| <Program Files>\WADTrace.log | Trace logging information generated in special scenarios for usage by Web Active Directory support engineers. |

Other customized files

You might have changed other files that you want to migrate to your new installation, especially if you made changes beyond the default PeopleUpdate installation. The file list below shows other files that you might want to back up to use for migrating to PeopleUpdate.

| File(s) | File Path | Notes |
|---------------------------|---|---|
| Localization files | <Program Files>\WadLocalizationTemplate.xml | Stores localization information for the application. You do not need to back up this file if you have not made any localization changes. You also may have multiple localization files if you have localized multiple tabs and ensure you back up all of these files. |
| LDAP mapping file | <Program Files>\ | Stores custom mappings to LDAP attributes in |

PeopleUpdate v4.4 Installation Guide

| | | |
|-------------------------------|---|--|
| | LdapMapping.xml | Active Directory. You do not need to back up this file if you have not made any mapping changes. |
| ISO country code file | <Program Files>\Iso3166-1List_en.xml | Stores ISO country code mappings used by PeopleUpdate. You do not need to back up this file if you have not made any mapping changes. |
| Image files | <IIS Application Root>\Images\Branding | Back up your custom logo image. |
| Style sheets | <IIS Application Root>\Styles | Back up customized CSS style sheets for the application. You do not need to back up this file if you have not made any style sheet changes. |
| Other customized files | <IIS Application Root>\ and <IIS Application Root>\UserControls | Back up files you've customized, including ASPX pages and ASCX controls. You do not need to back up any of these files if you have not made any changes. Web Active Directory highly recommends that you do not make changes to any of these files although there are special situation where you may have to do this. |

Obtain a New Serial Number from Web Active Directory Support

Contact Web Active Directory Support at support@webactivedirectory.com to obtain a new serial number if you have forgotten your old one or your old one doesn't work. With new major versions you may need a new serial number.

NOTE

PeopleUpdate installs without a fully-registered serial number. Once the installation completes, you will be running an evaluation version of the solution until you obtain and register a valid serial number to run the full version. If you are running an evaluation version, refer to the Evaluation Serial Numbers section on page 23 for the correct evaluation serial numbers to use.

Post-Upgrade Tasks

After you install PeopleUpdate—described in the Installation Procedure section on page 15—you need to accomplish a few tasks to complete the upgrade to the new release. The following sections describe the tasks and you can contact Web Active Directory support if you need additional assistance.

Register PeopleUpdate

You need to enter a valid serial number to run the fully-registered version of PeopleUpdate. Refer to the Registering PeopleUpdate with a Valid Serial Number section on page 23 for more information about license registration in PeopleUpdate.

Migrate Current Files

The PeopleUpdate v3.4 SR #1 and later installers create a new file structure for the application. You need to migrate your current customized files into this structure if you want to preserve your customizations when upgrading from a release prior to v3.4 SR #1.

PeopleUpdate v4.4 Installation Guide

NOTE

The files you are migrating have not changed significantly from v3.4 to the latest PeopleUpdate release. Instead, the file names and locations have changed and this is why you need to complete the migration process manually.

The notes below describe the files you might want to migrate and the changes to make to each file.

| Files to Migrate | Changes | Comments |
|---|--|--|
| WADPSConfiguration.xml OR WADPUConfiguration.xml | Rename the file to WebADConfiguration.xml and put it into the <Program Files>\WebActiveDirectory\PeopleUpdate\Configuration directory | Stores configuration data for the application. Both PeopleSearch and PeopleUpdate use the new file name. |
| WADError.log | Rename the file to WebADError.log and put it into the <Program Files>\WebActiveDirectory\PeopleUpdate\Logs directory | Contains error information logged while PeopleUpdate is running. |
| WADTrace.log | Rename the file to WebADTrace.log and put it into the <Program Files>\WebActiveDirectory\PeopleUpdate\Logs directory | Contains trace log information used by Web Active Directory support engineers to troubleshoot issues. |
| WadLocalizationTemplate.xml | Rename the file to WebADLocalizationTemplate.xml and put it into the <Program Files>\WebActiveDirectory\PeopleUpdate\Configuration directory | Stores localization data for the application. |
| Iso3166-1List_en.xml AND LdapMapping.xml | Leave the file names the same and put them into the <Program Files>\WebActiveDirectory\PeopleUpdate\Configuration directory | Contains country code and LDAP attribute mappings. |
| Web application files | Move the customized images, style sheets and other resources to the matching location in the <Program Files>\WebActiveDirectory\PeopleUpdate\Web directory | Contains the Web application files that PeopleUpdate uses. |

PeopleUpdate v4.4 Installation Guide

Uninstall the Previous Version of PeopleSearch or PeopleUpdate Using Add/Remove Programs

Once you complete the migration process and test everything in the new PeopleUpdate application to ensure it works as you desire, you can remove the previous version of PeopleSearch or PeopleUpdate. Use the Add/Remove Programs option (Programs and Features in Windows Server 2008) to uninstall the previous version of PeopleUpdate—called WAD PeopleUpdate <Version Number> in contrast to later releases that are called WebAD PeopleUpdate—and ensure you remove all files and registry keys when prompted. This should completely remove all application artifacts from previous versions of PeopleUpdate.

If you want to ensure all artifacts have been removed after the uninstallation process completes, you can check the following file locations and registry keys and delete anything remaining.

| Component | Notes |
|-----------------------------|---|
| Legacy Files | <ul style="list-style-type: none">• C:\Inetpub\wwwroot\PeopleUpdate: Contains old web application• C:\Program Files\WebActiveDirectory (or other location of configuration directory if you changed it): Contains configuration files. Only delete files in the root of the directory and leave the subdirectories intact. |
| Legacy Registry Keys | Delete the WebActiveDirectory registry key if it was not removed during uninstallation. You can find the key at HKEY_LOCAL_MACHINE\SOFTWARE\WebActiveDirectory. No other Web Active Directory products use registry keys so you can safely delete the WebActiveDirectory key and all subkeys without affecting other applications. |

NOTE

Be careful when cleaning out the WebActiveDirectory directory. You do not want to delete the new PeopleUpdate application you just installed. The directory also may not be empty if you are running another Web Active Directory product like PeoplePassword.

Upgrade Notes

You need to consider a number of factors when upgrading to the latest version of PeopleUpdate from a version of PeopleUpdate prior to v3.4 SR #1, including upgrading from PeopleSearch or PeopleUpdate v3.4. In v3.4 Service Release #1, Web Active Directory made significant changes to core product components for this release—including employing a new product installer program, adding a new licensing system, updating the web application settings in IIS and changing the PeopleUpdate file system structure—and these changes might require you to move files or change other settings to comply with the new components.

Changes from Previous Versions to v3.4 SR #1

To improve the experience of installing and using PeopleUpdate, Web Active Directory made changes to the installer and licensing systems used with the PeopleUpdate solution. These changes do not have much of an impact on the current Administration Console configuration interface or application

PeopleUpdate v4.4 Installation Guide

behavior. However, with changes to how the application is installed and how its resource files are stored you will need to consider several factors when you upgrade to v3.4 SR #1 from a previous release.

The following list of changes highlights the major differences between v3.4 SR #1 and the previous release, v3.4. You should review these changes if you are upgrading so that you have an understanding of how these changes will impact your upgrade activities. Once you review the changes, refer to the Upgrade Considerations section on page 6 for detailed information to actually perform your upgrade.

Combined PeopleSearch and PeopleUpdate

PeopleSearch and PeopleUpdate no longer exist as separate installations and products. You can choose which product you want to install when you run the product's installer package and you can even change the installed product after you install PeopleUpdate. Combining the two products into one simplifies the management of either system and allows you to easily upgrade from PeopleSearch to PeopleUpdate.

Added New Licensing System

Web Active Directory introduced a new licensing system for v3.4 Service Release #1. This licensing system allows you to easily register an evaluation edition of a product using a serial number to upgrade to a licensed version. You can also switch between the PeopleSearch and PeopleUpdate products by changing the serial number.

NOTE

Your existing serial number will not work with the new licensing system. Please send an email to support@webactivedirectory.com to obtain a valid serial number so you can register your product.

Changed IIS Configuration for PeopleUpdate Web Application

To isolate the PeopleUpdate web application from other web applications on the web server where PeopleUpdate is installed, Web Active Directory no longer installs the PeopleUpdate web application under the Default Web Site in IIS. Instead, the installer now installs PeopleUpdate as a web site running on port 8100. In addition, the installer creates a dedicated application pool to use to run PeopleUpdate, further isolating PeopleUpdate from affecting or being affected by other web applications on the web server.

NOTE

You cannot change the default port used to run PeopleUpdate until after the installation completes. You may then alter the IIS configuration using IIS Manager, including changing the TCP port number.

Updated PeopleSearch Authentication

The changes made to combine the PeopleSearch and PeopleUpdate applications also affect the default configuration for the PeopleSearch IIS web site application settings. PeopleSearch now uses Integrated Windows authentication in IIS instead of Anonymous authentication. You can change the authentication

PeopleUpdate v4.4 Installation Guide

type back to Anonymous if you like. You will also need to update the Web.config file for the application if you want to use forms authentication instead of Windows authentication for PeopleSearch.

NOTE

Web Active Directory recommends using Integrated Windows authentication with PeopleSearch unless you are exposing PeopleSearch to unauthenticated users over the Internet or other unsecure connection.

Reconfigured File Locations

Every component of PeopleUpdate—including the web application and resource files—now installs under the default Program Files location on your system at *%PROGRAM FILES%\WebActiveDirectory\PeopleUpdate*. This implementation follows Microsoft best practices for installing products and allows you to easily manage backups and other aspects of PeopleUpdate in one directory location.

NOTE

You cannot change the default installation location until after the installation completes. Web Active Directory highly recommends that you do not change this file location. If you do change the location, you need to update the IIS configuration to use the new directory for the web site root directory.

PeopleUpdate's resource files—including configuration files and log files—have moved to the new Program Files location. The installer automatically applies NTFS permissions to the product directory to ensure the application pool identity service account has the necessary rights it needs to run PeopleUpdate.

Refer to the details below for more information about the file changes. You will need to be aware of these changes as you go through the upgrade process since you might want to migrate files from your existing installation into the new directory and file arrangement.

| File Set | Old Location | New Location | Comments |
|------------------------------|------------------------------------|--|--|
| Configuration files | <Program Files>\WebActiveDirectory | <Program Files>\WebActiveDirectory\PeopleUpdate\ Configuration | Application configuration files including custom settings, localization sets and LDAP attribute mappings |
| Log files | <Program Files>\WebActiveDirectory | <Program Files>\WebActiveDirectory\PeopleUpdate\ Logs | Error log and trace log files |
| Web application files | <Inetpub>\<wwwroot>\PeopleUpdate | <Program Files>\WebActiveDirectory\PeopleUpdate\ Web | All web application files and related resources |

PeopleUpdate v4.4 Installation Guide

Changed File Names

Some of the resources used by the PeopleUpdate solution have new names in addition to residing in different locations than in releases prior to v3.4 Service Release #1. These file name changes reflect innovations in the application as well as the combining of PeopleSearch and PeopleUpdate resources.

Refer to the information below so you know how to rename any files you are migrating to the new release of PeopleUpdate.

| File | Old Name | New Name | Comments |
|------------------------------|--|-------------------------------|---|
| Configuration file | WADPSConfiguration.xml OR WADPUConfiguration.xml | WebADConfiguration.xml | Combined PeopleSearch and PeopleUpdate configuration file that stores configuration settings for PeopleUpdate |
| Log file | WADError.log | WebADError.log | Error log file |
| Trace file | WADTrace.log | WebADTrace.log | Trace log file |
| Localization template | WadLocalizationTemplate.xml | WebADLocalizationTemplate.xml | Template for localizing the application interface |
| Other files | Iso3166-1List_en.xml AND LdapMapping.xml | Names did not change | Application resource files |

Updated Resource File Location Pointers

PeopleUpdate now stores all references to its application resource files in the Web.config file in the web application root directory. This simplifies application management and consolidates the configuration from several locations to one.

The changes to the Web.config include adding keys for the application configuration and error log file locations. You will need to update your current Web.config file to include these keys and the upgrade procedure in the Upgrade Considerations section on page 6 has instructions to do this.

The new Web.config keys include the following.

| Web.config Key | Description |
|---|--|
| WebAD.ResourceFiles.ConfigFilePath | Path to the PeopleUpdate configuration file. |
| WebAD.ResourceFiles.ErrorLogFilePath | Path to the PeopleUpdate error log file. |

PeopleUpdate v4.4 Installation Guide

NOTE

The trace log file path is stored in the assert element's logfilename attribute of the system.diagnostics section of the Web.config file. This is the same configuration as in previous versions of PeopleSearch and PeopleUpdate.

Removed Registry Keys

Web Active Directory engineers further simplified PeopleUpdate configuration by removing all registry keys formerly used to indicate paths to the application's configuration, error log and trace log files. These values are now stored in the Web.config file and you can get more information in the Updated Resource File Location Pointers section on page 14.

NOTE

The PeopleUpdate installer will remove the registry keys along with other configuration files when you uninstall versions of PeopleUpdate prior to v3.4 SR #1. Make sure you choose to remove all registry keys and configuration values when prompted by the uninstaller.

Marked Files as Permanent

The PeopleUpdate installer marks certain files as permanent to ensure these files are not overwritten during subsequent upgrades. The following files marked as permanent will remain on your file system even after a complete uninstallation of PeopleUpdate v3.4 SR #1 and you will need to remove these files manually if you want to remove all PeopleUpdate artifacts.

| File Path | Notes |
|--------------------|---|
| /Configuration/*.* | All files in the Configuration directory are retained. |
| /Logs/*.* | All files in the Logs directory are retained. |
| /Web/Web.config | The Web.config file is retained in the web application. |

Installation Procedure

The PeopleUpdate installer contains everything you need to run PeopleUpdate. The installation takes less than five minutes and leaves you with a clean PeopleUpdate installation that is ready for you to use in your environment.

NOTE

The PeopleUpdate installer should not restart IIS or affect any other applications or processes on the web server. However, you might want to schedule an application outage to be safe if you are installing on a production system.

Important Upgrade Considerations

If you are upgrading to the latest version of PeopleUpdate from a release prior to v3.4 SR #1, please refer to the Upgrade Considerations section on page 6 for more information about migrating your

PeopleUpdate v4.4 Installation Guide

current configuration settings and application customizations to the new release format. You can install the latest PeopleUpdate release side by side with versions of PeopleSearch and PeopleUpdate prior to v3.4 SR #1 and this allows you to easily migrate settings from a previous version.

NOTE

If you are upgrading from a release including or after v3.4 SR #1, you can easily upgrade by running the installer and following the one-step upgrade procedure in the installer wizard.

Installing PeopleUpdate

Follow the simple instructions below to install PeopleUpdate. You must be logged in to the installation server as an administrator to properly install PeopleUpdate.

NOTE

You can successfully install the latest release of PeopleUpdate alongside versions of PeopleSearch and PeopleUpdate prior to v3.4 SR #1 and run both versions simultaneously. This makes it very easy to migrate settings from a previous release to the new release.

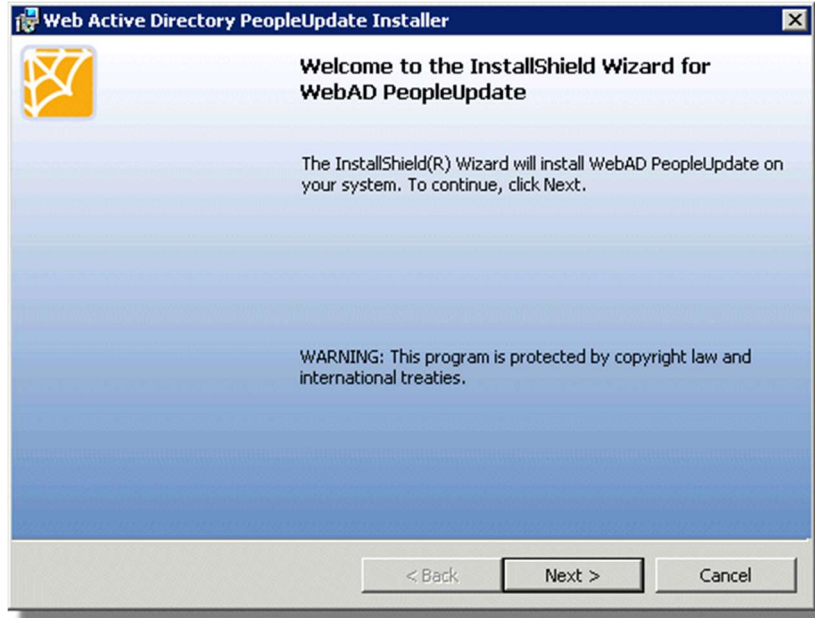
1. Before you begin, please ensure the Computer Browser service is running on the server where you're installing PeopleUpdate. You can turn this service off after you finish the PeopleUpdate installation.
Computer Browser Service: Collects and distributes the list of workgroups and domains and the servers within them. This service allows the installation wizard to locate domain controllers and verify the user account's existence when setting the AD service account in the wizard. Make sure to enable and start this service on the server where you install PeopleUpdate. You also might have to turn on the service on at least one domain controller if you have problems verifying the account in the installation wizard.
2. Unzip the contents of the zip file you downloaded from the Web Active Directory download site to a location on your local installation system.
3. As noted below, run the installer as an administrator.

NOTE

If you are installing PeopleUpdate on Windows Server 2008 or Windows Server 2008 R2, ***you must run the installer as an administrator*** or the installation will not complete all the setup tasks. Even if you are logged in to the installation server as an administrator, the operating system will not run the installation under the administrator account's privileged security context unless you explicitly run it this way. Ensure you right-click the WebAD_PeopleUpdateSetup.exe file and choose ***Run as administrator*** to install PeopleUpdate under an administrative security context.

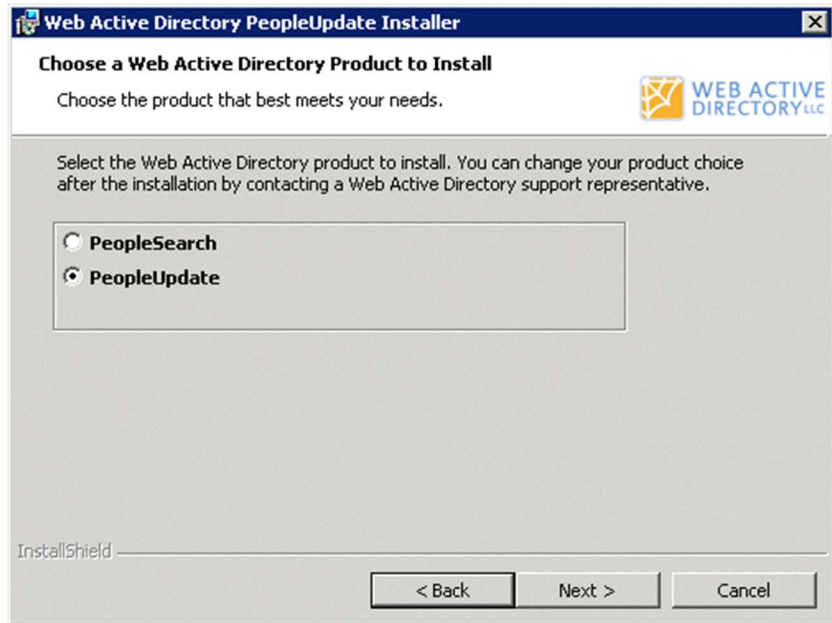
PeopleUpdate v4.4 Installation Guide

4. The installer begins and displays the PeopleUpdate Installer Welcome Page.



Click Next to continue.

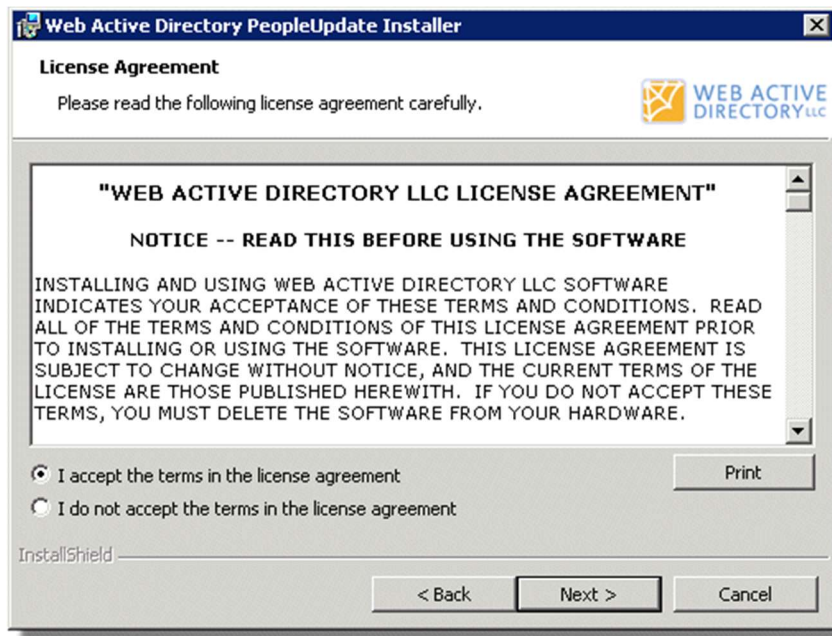
5. Choose the product to install: PeopleSearch or PeopleUpdate. You can change the installed product after you complete installation by entering a different licensing serial number that you can obtain from Web Active Directory.



Click Next to continue.

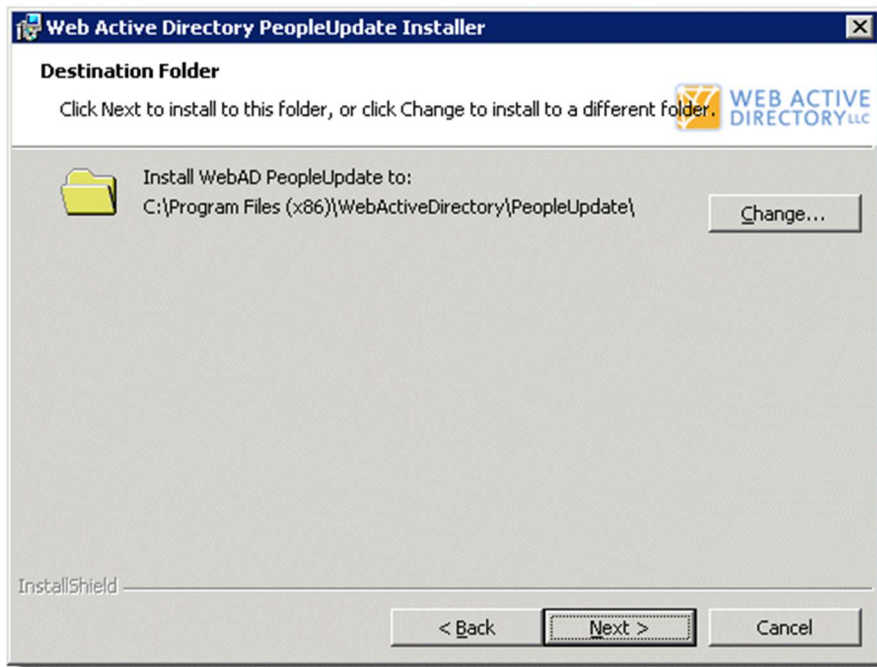
6. Read the license agreement and indicate that you agree to the terms to continue installing PeopleUpdate.

PeopleUpdate v4.4 Installation Guide



Click Next to continue.

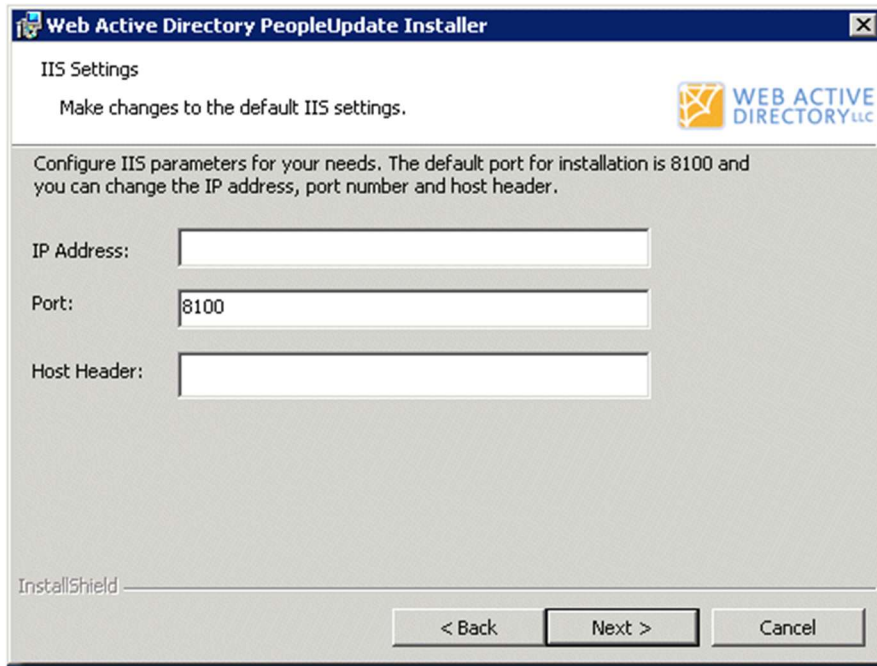
7. You may leave the default destination folder or change the destination folder where PeopleUpdate is installed.



8. Customize the default IIS settings if you would like. By default, PeopleUpdate installs on port 8100 with no IP address or host header specified. If you make changes to the configuration, the Programs menu shortcuts in Windows will not work for PeopleUpdate and you will need to access the application directly using a web browser. You can also update the web application shortcuts to

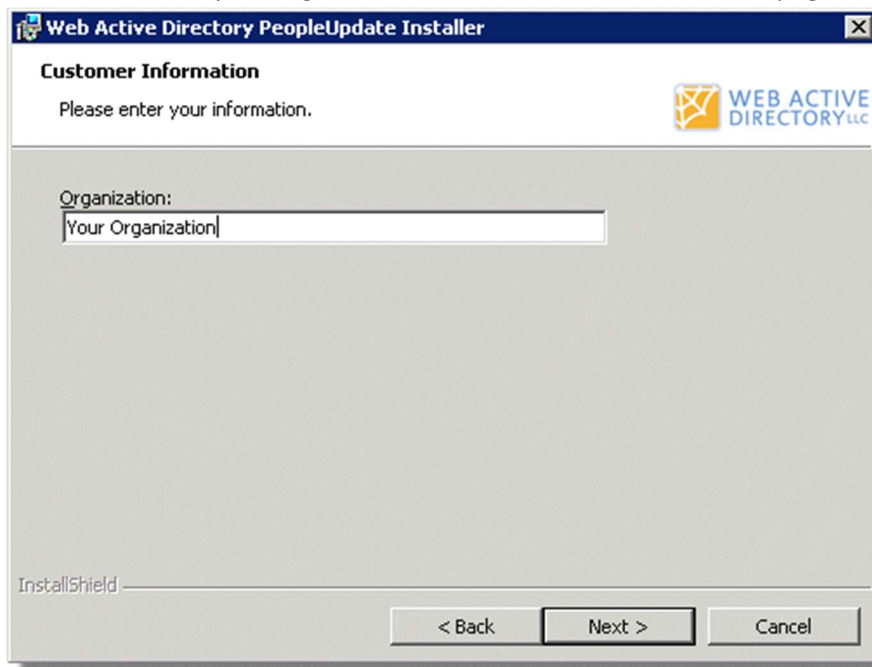
PeopleUpdate v4.4 Installation Guide

match your IP address, port number and host header by changing the properties of the shortcuts in the PeopleUpdate Web directory after the installation completes.



The screenshot shows the 'Web Active Directory PeopleUpdate Installer' window. The title bar includes the application icon and the text 'Web Active Directory PeopleUpdate Installer'. The window has a standard Windows XP-style title bar with minimize, maximize, and close buttons. The main content area is titled 'IIS Settings' and contains the instruction 'Make changes to the default IIS settings.' followed by a brief explanation: 'Configure IIS parameters for your needs. The default port for installation is 8100 and you can change the IP address, port number and host header.' Below this text are three input fields: 'IP Address:', 'Port:', and 'Host Header:'. The 'Port:' field is pre-filled with '8100'. At the bottom of the window, there is a status bar with the text 'InstallShield' and three buttons: '< Back', 'Next >', and 'Cancel'. The 'Web Active Directory' logo is visible in the top right corner of the main content area.

9. Enter the name of your organization in the Customer Information page.



The screenshot shows the 'Web Active Directory PeopleUpdate Installer' window. The title bar includes the application icon and the text 'Web Active Directory PeopleUpdate Installer'. The window has a standard Windows XP-style title bar with minimize, maximize, and close buttons. The main content area is titled 'Customer Information' and contains the instruction 'Please enter your information.' followed by a brief explanation: 'Configure IIS parameters for your needs. The default port for installation is 8100 and you can change the IP address, port number and host header.' Below this text are three input fields: 'IP Address:', 'Port:', and 'Host Header:'. The 'Port:' field is pre-filled with '8100'. At the bottom of the window, there is a status bar with the text 'InstallShield' and three buttons: '< Back', 'Next >', and 'Cancel'. The 'Web Active Directory' logo is visible in the top right corner of the main content area.

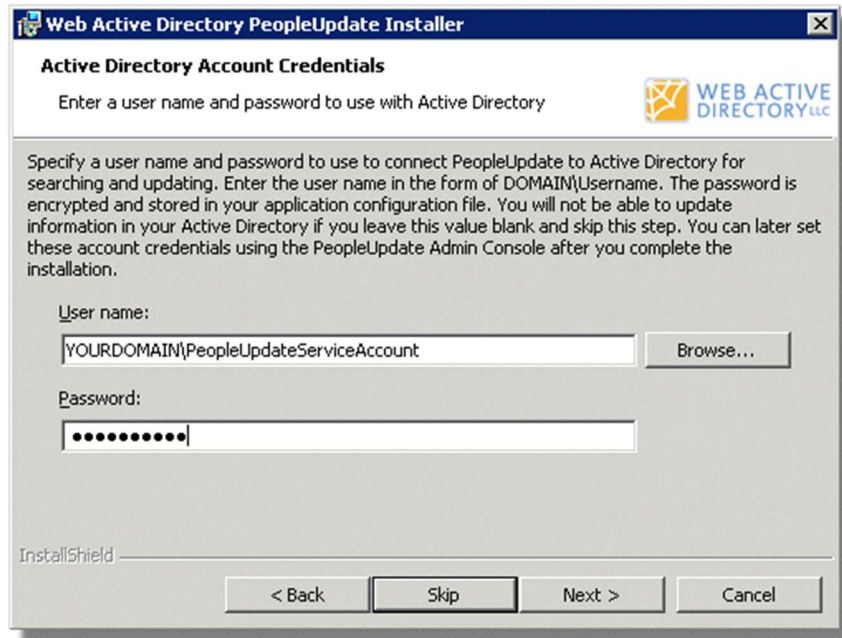
Click Next to continue.

10. Specify the Windows user account to use when updating Active Directory passwords or unlocking Windows user accounts. You can create a service account to use for this operation in Active Directory Users & Computers and—once you've created the account—you can run the Delegation of

PeopleUpdate v4.4 Installation Guide

Control wizard to give the proper privileges to the service account. The service account requires privileges to update Active Directory object data or PeopleUpdate edits will not work. Refer to the Delegating administration topic on Microsoft's TechNet site for more information about the wizard: [http://technet.microsoft.com/en-us/library/cc778807\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc778807(WS.10).aspx)

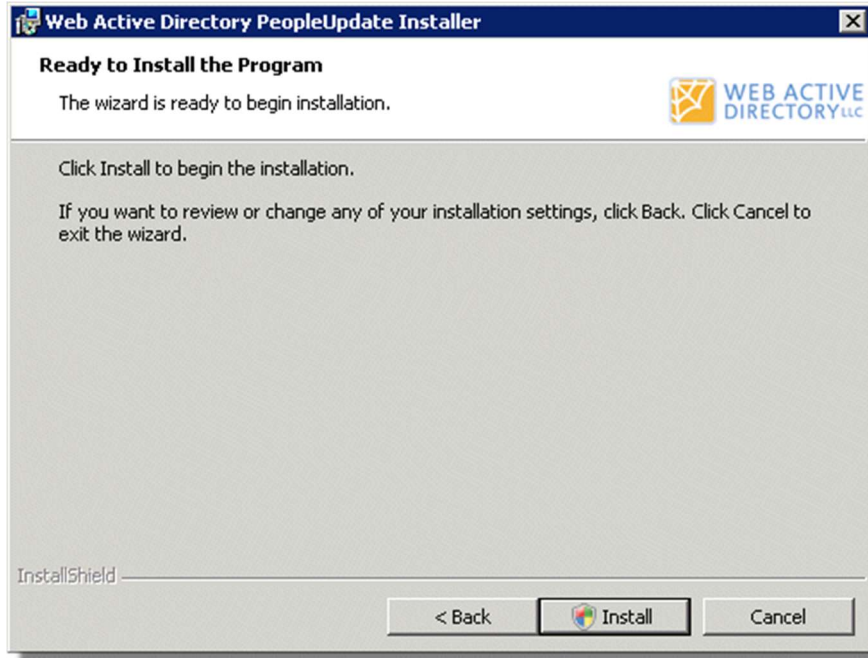
Note: Type the User name in using the NetBIOS domain. For example, type MYDOMAIN\MyServiceAccount instead of just MyServiceAccount.



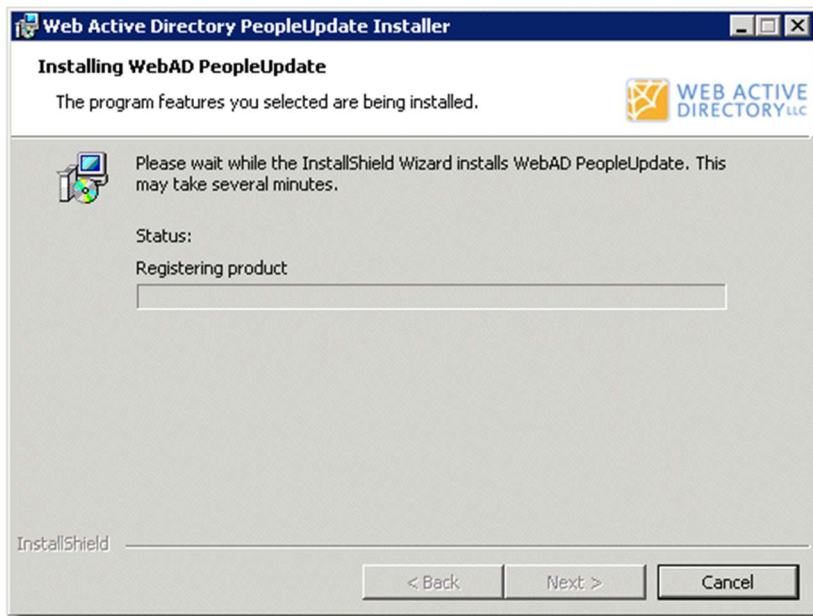
The installer verifies that the account password is correct. Click Next to continue.

PeopleUpdate v4.4 Installation Guide

11. You have entered all the information necessary to install PeopleUpdate on your system.



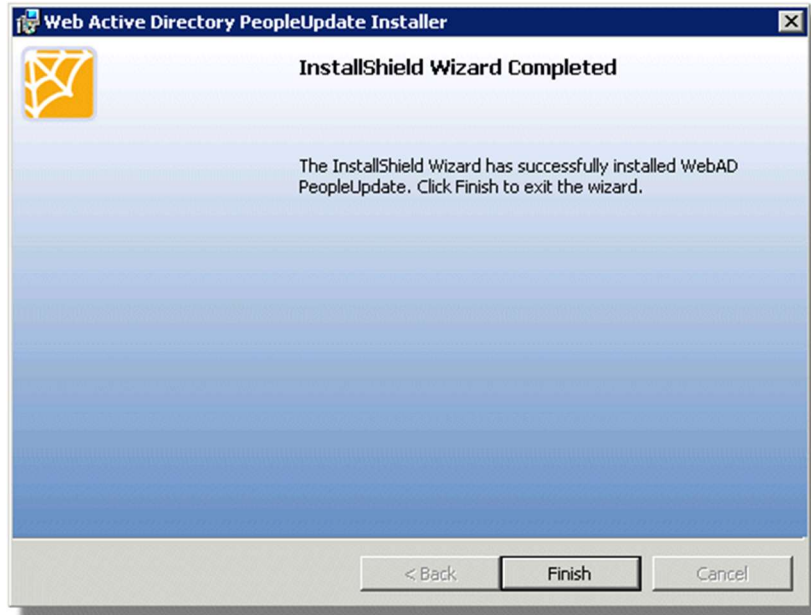
Click Next to install PeopleUpdate. The installer creates the components you need to run PeopleUpdate, including the web application and configuration and log components.



Click Cancel if you want to cancel the installation and roll back changes made during the installation process.

PeopleUpdate v4.4 Installation Guide

12. You will see the Completed Page once the installation finishes.



Click Finish to close the installer.

13. You are now ready to run PeopleUpdate.

Running PeopleUpdate after Installation

Once the installation completes, you will have a production-ready PeopleUpdate instance on your system. The installer creates a Programs menu item called Web Active Directory PeopleUpdate on the web server and this item contains shortcuts to the Admin Console and Search Console. You can also manually type the URL into your browser as long as you access the correct port number of 8100.

NOTE

In certain cases, the Programs menu shortcuts may display an error message when clicked. In this case, manually access each web application on the server by the port number. For example, you can type in a URL like <http://localhost:8100/AdminPage.aspx> to access the PeopleUpdate Administration Console. The default URL will not work if you made changes to the IIS configuration during installation.

When first installed, PeopleUpdate runs as a 30-day evaluation version until you obtain a valid serial number. Refer to the Registering PeopleUpdate with a Valid Serial Number section on page 23 for more information about license registration in PeopleUpdate.

NOTE

The first time you access the PeopleUpdate web application, there is a delay loading the page because the application must be compiled and loaded into memory by the ASP.NET run-time environment. Subsequent accesses of compiled ASP.NET applications are much faster than the first time an

PeopleUpdate v4.4 Installation Guide

application is loaded since the compilation has already been completed. The application remains resident in memory until the application has had no page requests for a certain period of time, typically 20 minutes. You can change this value in the Application Pool settings in IIS.

Configuring PeopleUpdate

Once you access the PeopleUpdate Admin Console, you can customize the PeopleUpdate configuration to best meet your organization's needs for searching and updating Active Directory information. Refer to the Help documentation on the left navigation menu of the Admin Console for details on how to configure PeopleUpdate. You may also call Web Active Directory Support at +1 800.747.3565 extension 200 or send an email to support@webactivedirectory.com if you need assistance.

Registering PeopleUpdate with a Valid Serial Number

After you install PeopleUpdate, you may need to change the serial number to run the fully-registered edition of the product instead of evaluation edition. Contact Web Active Directory Support by sending an email to support@webactivedirectory.com to obtain a valid serial number for your installation. You can then enter the serial number on the license registration page available from the Licensing menu of the Administration Console.

Evaluation Serial Numbers

If you are running an evaluation version of the software, use the following serial numbers for the product you are evaluating.

- PeopleSearch Evaluation Serial Number: TRY-UF9EE-CHX12-MQ3R-5AYJ
- PeopleUpdate Evaluation Serial Number: TRY-DJGLH-UM12U-0V9G-5QD9