
PeopleEnroll v1.0 Installation and Configuration Guide

Instructions to Install and
Configure PeopleEnroll
v1.0

Web Active Directory, LLC

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Overview

PeopleEnroll allows you to automatically import PeoplePassword enrollment data from another system into PeoplePassword. This Windows console utility—which runs on the Microsoft .NET platform—can be run manually or scheduled to run on a regular basis via a Windows scheduled task.

This installation and configuration guide provides instructions for installing and configuring PeopleEnroll for your environment. After installation, you must ensure to set the database connection information before you can successfully run PeopleEnroll.

NOTE

Refer to the [Import the Scheduled Task to Run PeopleEnroll Each Day and Tweak Configuration Settings](#) sections for more information.

Installation Support

Call Web Active Directory Technical Support at +1 800.747.3565 extension 200 or send an email to support@webactivedirectory.com if you need assistance with issues that arise while installing or configuring PeopleEnroll.

System Requirements

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

- Windows Server 2003 or later (including Windows Server 2008 and 2008 R2): Web, Standard, Enterprise or Datacenter Edition: Hosts PeopleEnroll application. Please ensure the server is not a domain controller and is a member server in a domain.
- .NET Framework version 2.0 SP1 or SP2: Runs Microsoft .NET applications. You must install at least Service Pack 1 of the .NET Framework and Web Active Directory recommends that you install Service Pack 2. You can download SP2 from Microsoft's download site at <http://www.microsoft.com/downloads/details.aspx?familyid=5B2C0358-915B-4EB5-9B1D-10E506DA9D0F&displaylang=en>.
- PeoplePassword v2.0 or later: Destination system for data imported using PeopleEnroll.
- Windows service account with permissions to run PeopleEnroll and connect to the PeoplePassword system database: Used by PeopleEnroll to run the utility and connect to the PeoplePassword database to import enrollment data.

IMPORTANT NOTE

Your service account must have privileges to run a Windows scheduled task and also must be in the SQL Server db_datareader and db_datawriter roles in the PeoplePassword database catalog.

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- 3 MB disk space: Stores physical files used to run PeopleEnroll

Installation

This section includes installation instructions for new installations of PeopleEnroll.

Installation Procedure

The PeopleEnroll installer includes an executable component and several resource files. The default installation directory is %Program Files%\WebActiveDirectory\PeoplePassword_EnrollmentDataImport.

The PeopleEnroll installer contains everything you need to run PeopleEnroll. Refer to the System Requirements section on page 2 for more information about prerequisites. The installation takes less than two minutes and leaves you with a clean PeopleEnroll installation that is ready for you to use in your environment after a little configuration.

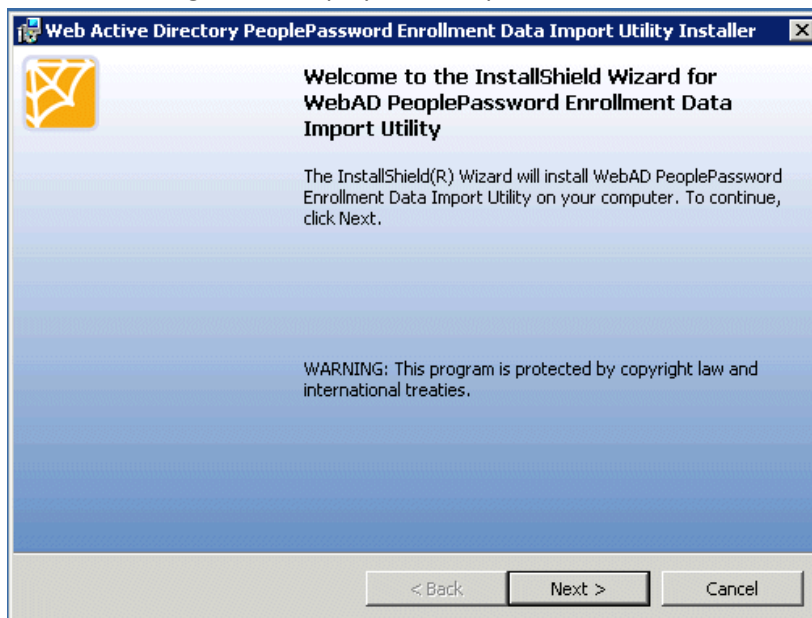
NOTE

If you are installing PeopleEnroll on Windows Server 2008, ***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_PeoplePassword_EnrollmentDataImportSetup.exe file and choose ***Run as administrator*** to install PeopleEnroll under an administrative security context.

1. Unzip the contents of the zip file you downloaded from the Web Active Directory download site to a location on your local installation system.
2. Read the important installation notes contained in the installation guide included with the download package.
3. To begin the installation, run the WebAD_PeoplePassword_EnrollmentDataImportSetup.exe file that you extracted from the zip file.

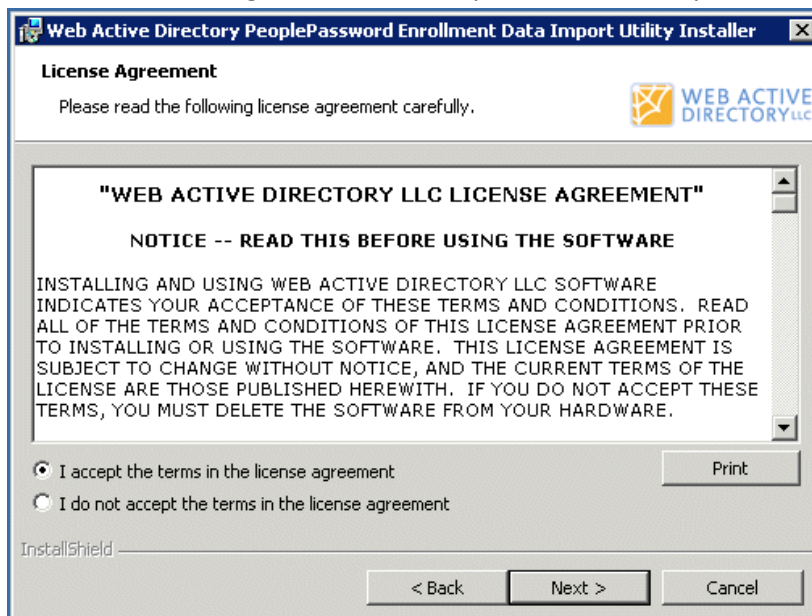
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4. The installer begins and displays the PeopleEnroll Installer Welcome Page.



Click Next to continue.

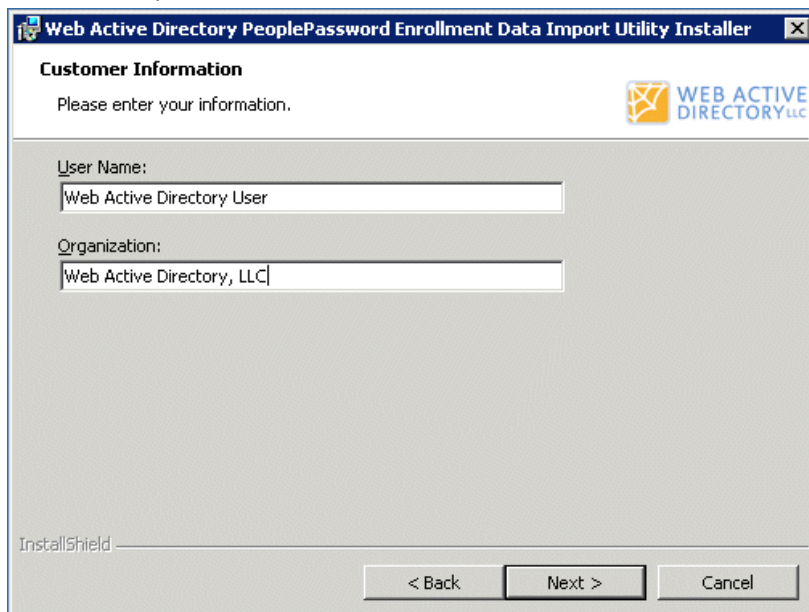
5. Review the license agreement and accept the terms after you review them.



Click Next to continue.

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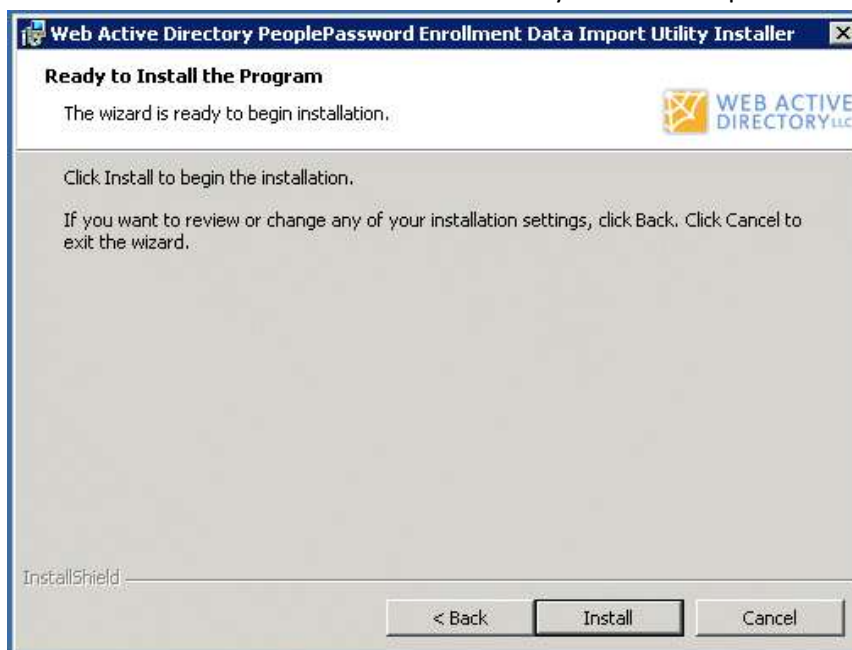
6. Enter the requested customer information.



The screenshot shows a Windows installer window titled "Web Active Directory PeoplePassword Enrollment Data Import Utility Installer". The window has a blue header bar with the title and a close button. Below the header, the text "Customer Information" is displayed in bold. Underneath, it says "Please enter your information." and the Web Active Directory logo is visible in the top right corner. There are two text input fields: "User Name:" with the value "Web Active Directory User" and "Organization:" with the value "Web Active Directory, LLC". At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Click Next to continue.

7. You have entered all the information necessary to install PeopleEnroll on your system.

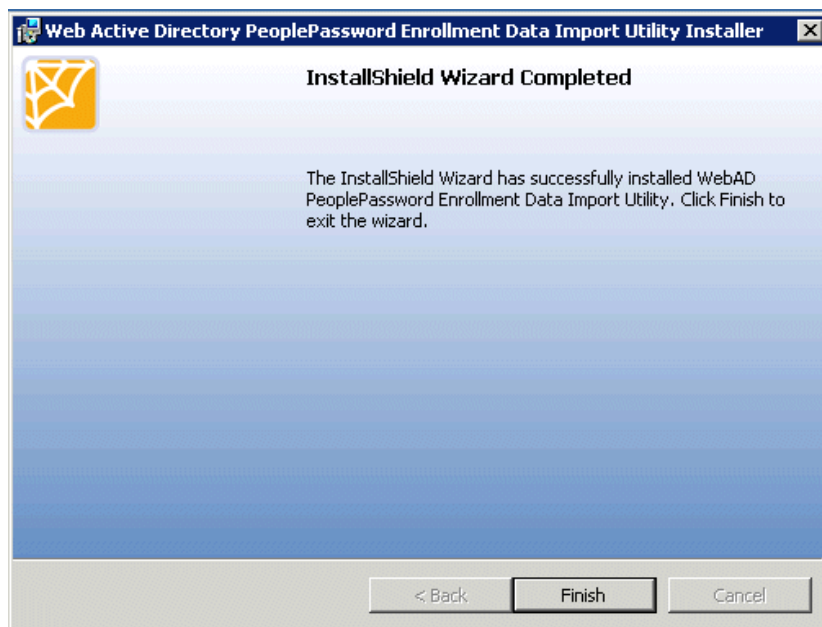


The screenshot shows the same installer window, now at the "Ready to Install the Program" step. The header bar is the same. The text "Ready to Install the Program" is displayed in bold. Below it, it says "The wizard is ready to begin installation." and the Web Active Directory logo is visible in the top right corner. The main area contains the text: "Click Install to begin the installation." and "If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard." At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Install", and "Cancel".

Click Next to install PeopleEnroll.

8. The installer installs the components you need to run PeopleEnroll. You will see the Completed Page once the installation completes.

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Click Finish to close the installer.

9. You are now ready to run PeopleEnroll.

Post-Installation Tasks

Once you complete installation of PeopleEnroll, perform the following tasks and you will be ready to run PeopleEnroll on a scheduled basis to automatically import enrollment data into PeoplePassword.

Import the Scheduled Task to Run PeopleEnroll Each Day

You need to import the appropriate scheduled task from the ScheduledTasks subdirectory of the PeopleEnroll installation directory into your Task Scheduler and set the service account and schedule for running the task. This allows the scheduled task to run PeopleEnroll on a daily basis to automatically import enrollment data into PeoplePassword. You can also tweak other scheduled task settings if you need.

- Use the *Web Active Directory PeopleEnroll - Daily Run - Win 2003.job* task for Windows Server 2003. You can drag and drop the .job file into the Scheduled Tasks directory on the server running PeopleEnroll.
- Use the *Web Active Directory PeopleEnroll - Daily Run - Win 2008.xml* task for Windows Server 2008. You can use the Import Task option in the Task Scheduler to import the task. Please create a WebActiveDirectory folder in your Task Scheduler Library to separate PeopleEnroll tasks from other tasks.

Tweak Configuration Settings in the XML Configuration File

Set common configuration file values for a couple of options before you begin using PeopleEnroll. Refer to the PeopleEnroll Configuration Files section for more information about setting these values. You can

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find the two configuration files used by PeopleEnroll in the PeopleEnroll installation directory and the files are called PeopleEnroll.config and PeopleEnroll.exe.config.

- Database Connection String: Configure the database connection string to connect to the PeoplePassword database to which you will import enrollment data.
- Import File: Set the name of the import file to specify which CSV data source file to use to import enrollment data into PeoplePassword.

PeopleEnroll Command Line Options

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

PeopleEnroll Command Line Values

The following command line parameters allow you to customize the runtime behavior of PeopleEnroll. You can also get helpful information about the parameters by just typing *PeopleEnroll.exe* with no arguments from the command line. This will not run PeopleEnroll and instead will only show you the parameters you can set. Ensure you preface each parameter using a slash (/) character.

Command Line Example

The following example imports users into PeoplePassword using the configuration values in the PeopleEnroll.config file found in the PeopleEnroll directory.

```
C:\Program Files\WebActiveDirectory\PeopleEnroll> PeopleEnroll.exe /configfile PeopleEnroll.config
```

The following example shows the license registration page for PeopleEnroll.

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

PARAMETER	VALUES EXPLANATION
?, h, or help	Shows help information for using command line parameters with PeopleEnroll.
register	Shows the license registration screen to allow you to register PeopleEnroll. Using this parameter causes PeopleEnroll 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. Using this parameter causes PeopleEnroll to ignore all other parameters except the register

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configfile	parameter. Indicates the path to the configuration file to use to run PeopleEnroll.
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PeopleEnroll Configuration Files

PeopleEnroll includes two configuration files you need to configure. You can make changes to the configuration files to customize PeopleEnroll for your environment. Refer to the sections below for specific information about the options available in each configuration file.

- **PeopleEnroll.exe.config:** Defines the database connection settings that PeopleEnroll needs to run properly.
- **PeopleEnroll.config:** Defines import data processing settings including the name of the CSV source data file to use and logging parameters.

PeopleEnroll: Database Connection Configuration Values

Use the configuration values in the `PeoplePassword_EnrollmentDataImport.exe.config` configuration file to set up the connection to the PeoplePassword database to which you are importing data.

Connection Strings Values

The only attribute value you need to set in this configuration is the database connection string value. The database connection string tells PeopleEnroll how to connect to the PeoplePassword database.

connectionStrings Element Values (<connectionStrings/>)

The `<connectionStrings />` element contains the PeoplePassword database connection information. The default connection strings element is listed below.

```
<connectionStrings>
  <add name="PeoplePassword" connectionString="Data
Source=mysqlserver;Initial
Catalog=WebActiveDirectory_PeoplePassword;Integrated Security=True;"
providerName="System.Data.SqlClient"/>
</connectionStrings>
```

You need to modify the `connectionString` attribute value in the `<add />` element to inform PeopleEnroll how to connect to the PeoplePassword database catalog. Refer to the table below for specific instructions about what to change.

ATTRIBUTE	DESCRIPTION
<code>connectionString</code>	Sets the database connection information for PeopleEnroll. Set the Data Source value to the name of the database server and set the Catalog value to the name of the database catalog. You can also change the security scheme if you like but Web Active Directory

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recommends using Integrated Security=True since this is one of the most secure connection protocols.

NOTE

You can refer to an entire list of SQL Server connection strings for both 2005 and 2008 at <http://connectionstrings.com/>.

PeopleEnroll: Import Process Configuration Values

Use the configuration values in the PeoplePassword_EnrollmentDataImport.config configuration file to set up options for importing enrollment data into PeoplePassword, including the name of the CSV source file and logging parameters for the import process.

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
LoggingLevel	Info, Verbose
LoggingMode	Overwrite, Append

ConfigurationSet Element Attribute Values (<ConfigurationSet />)

The <ConfigurationSet /> element contains attributes that you can modify to change how PeopleEnroll processes enrollment data imports.

ATTRIBUTE	DESCRIPTION
LogFile	Sets the file name for the log file that contains logging information when PeopleEnroll 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 PeopleEnroll. 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 content during a run to the end of the file. Append is the default value.
ImportFile	Sets the file name for the CSV source data file that is used to import data into the PeoplePassword database. 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 PeopleEnroll. You can also specify an absolute path with a full path name if you desire.

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Understanding the PeoplePassword Enrollment Data Export and Import Process

PeopleEnroll contains everything you need to import enrollment data into PeoplePassword...except the data you want to import! To import data into PeoplePassword, you need to create a CSV file with a specific format and export the enrollment data from your source system into the CSV file.

Fortunately, PeoplePassword provides a simple and easy way for you to create a CSV template file to use for exporting your source data and importing enrollment data into PeoplePassword. The Enrollment Data Import wizard in PeoplePassword asks you a few questions and then creates a CSV template that you can then use to export data from your source system.

Overall, the complete data export and import process looks like this:

1. Create a CSV file using the PeoplePassword Enrollment Data Import wizard.
2. Export data from your source system into the CSV file created in Step 1.
3. Run PeopleEnroll using the file populated in Step 2.
4. Verify the imported enrollment data are correct.
5. Add a scheduled task if desired to automate the import on a periodic basis.

Creating and Populating a PeoplePassword Enrollment Data Import CSV File

You can easily create the CSV template you need for Step 1 using the PeoplePassword Enrollment Data Import wizard.

1. Go to the PeoplePassword Configuration Center home page.
2. Choose the Enrollment Data Import panel to launch the Enrollment Data Import wizard.
3. Select the profile that includes the questions you want to use for the CSV template.
4. Select the questions to put into the template.
5. Create the template and save it.
6. Exit the wizard.

Once you have a CSV template, you can open it to see how you will need to structure the data you export from your source system into the CSV template file. Ultimately, when you populate the CSV file with data and then run the PeopleEnroll, the data from the file are imported into the PeoplePassword enrollment database.